

CONTACT DESKTOP

USER MANUAL

Date: March 2026

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1 FROM UNIFIED COMMUNICATIONS TO TEAM COLLABORATION

Increasing efficiency in the workplace goes beyond the boundaries of UC. The integration of instant messaging, voice, video and conferencing is crucial to this. Team Collaboration is taken to a new level by logging conversations and all exchanged data. Discussions are extended beyond the boundaries of meetings. The popularity of collaboration software with additional web communication functions shows that the currently available communication solutions do not meet the requirements.

Contact Desktop meets these requirements - a client solution that combines team collaboration functions with web communication (voice/video group calls).

Further documentation

Product	Link
Contact	help.summa.io/contact/1.00/web/Neutral/en-US/
Contact Mobile iOS	help.summa.io/umc/1.00/iOS/Neutral/en-US/
Contact Mobile Android	help.summa.io/umc/1.00/Android/Neutral/en-US/
Contact Connect	help.summa.io/contactconnect/1.00/web/Neutral/en-US/
Contact for Web	help.summa.io/contactweb/1.00/web/Neutral/en-US/

2 CONTACT DESKTOP


Contact Desktop extends your PBX functionalities on the desktop by seamlessly integrating team collaboration.

The program is available to download for Windows and macOS.

You can initiate, receive and manage calls, regardless of whether you use the integrated softphone, a desk phone or a mobile device. You can also see the presence status of your colleagues.

After downloading, the Contact Desktop icon will appear in the taskbar.

The application is automatically launched from the login screen. If the

icon is white , it indicates the availability status. If the symbol lights up red, there is no connection.



Some screenshots in this document may differ from the actual (current) implementation of Contact Desktop.

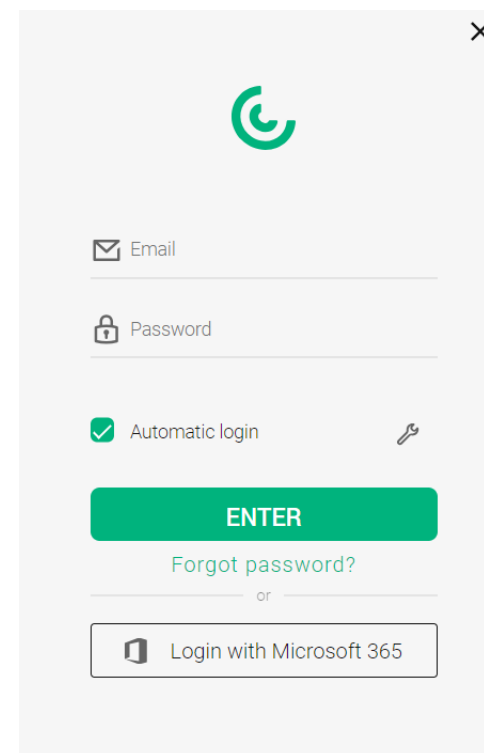
2.1 FEATURES

Contact Desktop offers the following functions, among others:

- Chat, see [2.5.5 Chat](#), page 15
- Queue management, see [3.6 Queues & Tools](#), page 26
- Outlook and Google integration, see [3.8.5 Integration settings](#), page 31
- Call control, see [4 Calling with Contact Desktop](#), page 39
- AI assistant Shomi, see [5 Shomi - Your Personal Assistant](#), page 46
- Meeting Room integration, see [6 Meetings](#), page 54

2.2 LOGIN

Contact Desktop allows you to log in either with credentials provided by your administrator or with your Microsoft account.



Login with Contact Credentials

To log in to Contact Desktop, you need the login details provided by your administrator.

To log in with your Contact credentials

- 1 Start Contact Desktop by clicking on the Contact Desktop icon on your desktop or screen (Mac).
- 2 Enter your user name and password and click on **Enter**.
 - ✓ You will be logged in to Contact Desktop.



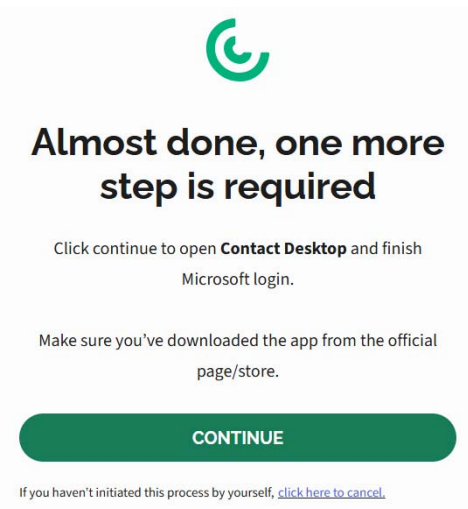
Select the **Automatic Login** checkbox to automatically log in to Contact Desktop when you start your computer.

Login with Microsoft 365 Credentials

Sign in directly with your Microsoft account for seamless integration with Microsoft services. If you have already logged in once with your Microsoft account, you no longer need to re-authenticate when enabling the Microsoft integration as described in *3.8.5.2 Microsoft integration*, page 32.

To log in with your Microsoft 365 Credentials

- 1 Start Contact Desktop by clicking on the Contact Desktop icon on your desktop or screen (Mac).
- 2 Click on **Login with Microsoft 365**.
 - ✓ The default browser on your system opens.
- 3 Enter your Microsoft credentials.
 - ✓ The following dialogue appears:



- 4 Click on **Continue**.
 - ✓ You are being logged in to Contact Desktop.
- 5 You may need to give your browser permission to open Contact Desktop, in this case your browser asks permission. Click on **Open Contact**.
- 6 You can close the window.
 - ✓ Contact Desktop opens and you are logged in with your Microsoft credentials.



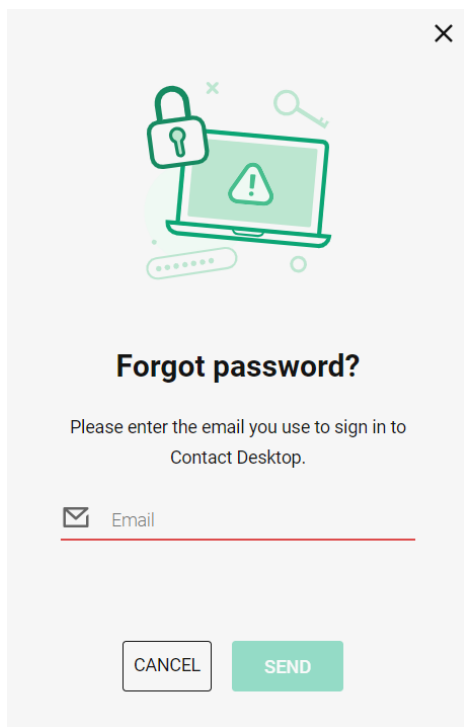
If the message **Your authentication has expired** appears, you need to re-authenticate with your Microsoft account. Microsoft may ask you to sign in more frequently until the application is recognized as a trusted app.

2.3 PASSWORD RESET

In case you forgot your password, you can use the **Forgot Password** function to securely reset it and regain access to your account.

To reset your password

- 1 Click on **Forgot password?** in the Contact Desktop login dialogue.
 - ✓ The following window appears:



- 2 Enter the email address associated with your Contact account.
- 3 Click on **Send**.
 - ✓ A password reset email will be sent to the provided address.



If the password reset email does not appear in your inbox, check your spam or junk mail folder before requesting a new reset link.

- 4 Click the link in the email.
- 5 Enter a new password.
- 6 Confirm the new password by entering it again.




When creating a new password, choose a strong and secure password that includes a combination of uppercase and lowercase letters, numbers, and special characters.

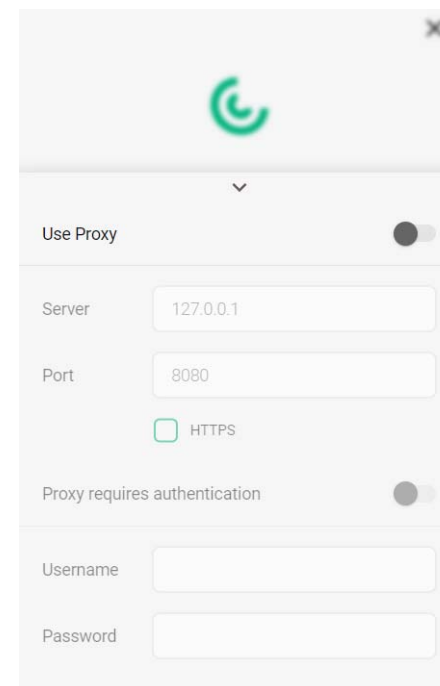
- 7 Click on **Send**.
 - ✓ Your password is changed and you can log in to Contact applications with your new password.

2.4 SUPPORT FOR HTTP/HTTPS PROXY

Contact Desktop is also supported in http/https proxy environments.

To set up Contact Desktop in http/https proxy environments

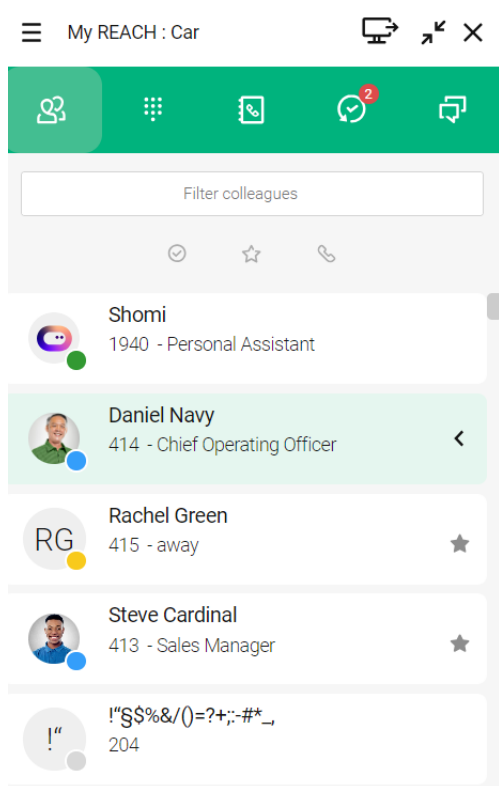
- 1 Click on  in the Contact Desktop login dialogue.
 - ✓ The following window appears:



- 2 Activate **Use Proxy**.
- 3 Enter the server and the port and, if necessary, activate HTTPS for the HTTPS proxy.

- If the respective proxy requires authentication, activate the lower switch and enter your user name and password.

2.5 USER INTERFACE



The Contact Desktop user interface is divided into five sections that allow you to perform different actions:

- [Internal Phonebook](#)
- [Dialer](#)
- [Phonebook](#)
- [Call history](#)
- [Chat](#)

2.5.1 INTERNAL PHONEBOOK

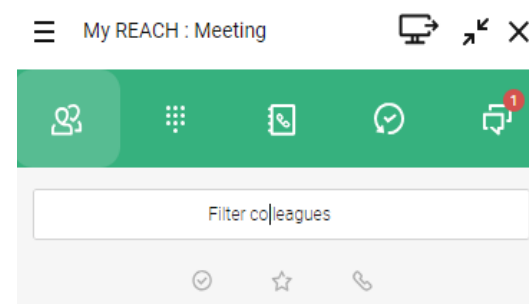
To get an overview of your colleagues and their availability, click on



The Internal Phonebook can be edited only with administrator rights and is available to all users in your company.

Search bar


In the search bar you can search by name and phone number. The search query is remembered when you navigate between the tabs.




You can also filter the entries according to various criteria.


- Activate to show colleagues who are online.
- Activate to show your Favorites.
- Activate to show colleagues who are available for calls.
- Activate to filter by groups.



If you disable the option **Show groups** in the colleague list settings, the icon  to filter groups in the phonebook will not be displayed. See [3.8.6 Colleagues list settings](#), page 37.

- Activate  to filter by queues.




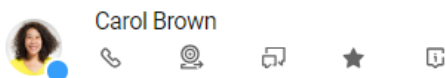
If you disable the option **Show queues** in the colleague list settings, the icon  to filter queues in the phonebook will not be displayed. See [3.8.6 Colleagues list settings](#), page 37.









If you have set contacts in the phone book as favorites, they are displayed at the top. The remaining contacts are listed below in alphabetical order.

To expand the options for a contact

- 1 Move the mouse over a contact.
- 2 Click on .
 - ✓ The options for the contact will open.



- 3 Click an icon to perform an action.
 - Click on  to call the subscriber.
 - Click on  to send an invitation to a Contact Meeting.
 - Click on  to open the chat.
 - Click on  to add a contact to your Favorites or click on  to remove a contact from your Favorites.






- Click on  to access the contact information.

You can set the behaviour when you click on a colleague in your contact list, see [To set the option "Click on a colleague in the list to"](#), page 37.

Status Display

The status of your contacts is indicated by a coloured dot on the profile picture.

You can set whether to show your status, see [3.3 Presence overwrite](#), page 25.

Symbol	State	Explanation
	Available for calls	Contacts that are not logged in to Contact Desktop but can be reached on a phone or mobile
	Online	Contacts that are logged in to Contact Desktop
	Away	Contacts who have manually set their presence override to Away .
	Busy	Contacts that are in a call, in a Meeting Room session, in an MS Teams call, or have their presence status set to Do Not Disturb
	Offline	Contacts that are not logged in to Contact Desktop or a device; contacts that have disabled the transmission of their presence status or manually set their status to Show as offline via client

Notification when a contact is available




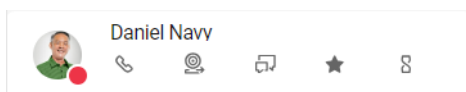
To see how your status in Contact synchronizes with your status in Microsoft Teams, and vice versa, see [Microsoft Teams Presence Synchronization](#), page 32.


You can set to receive a notification when a colleague in your contact list becomes available again after a call or meeting.

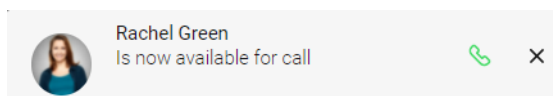
To set a notification about the availability of a contact


Your desired call partner is currently on the phone or in a meeting and has the status Busy (red).

- 1 Move the mouse over the contact in your contact list.
- 2 Click on .
 - ✓ The options for the contact will open.



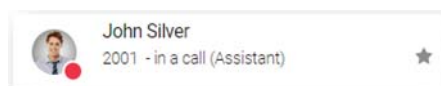
- 3 Click on .
 - ✓ You have set the notification about the availability of the contact. The other party ends the call and the status changes to online (green).
 - ✓ You will receive a notification about the availability of the contact.



- 4 Click on  to call the contact directly.

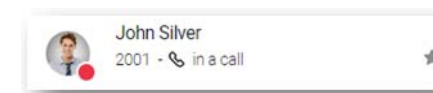
Presence state for Manager

There is a presence status for managers in the event that an assistant is handling a call on behalf of the manager. Instead of shown as **busy** or **in a call** the manager is shown as **in a call (assistant)**.



The assistant establishes that the manager (John Silver) is actually available as the assistant is handling a call on behalf of the manager. This allows him to forward a call to the manager if necessary.

If the manager (John Silver) is on a call himself, the assistant observes that he is busy.

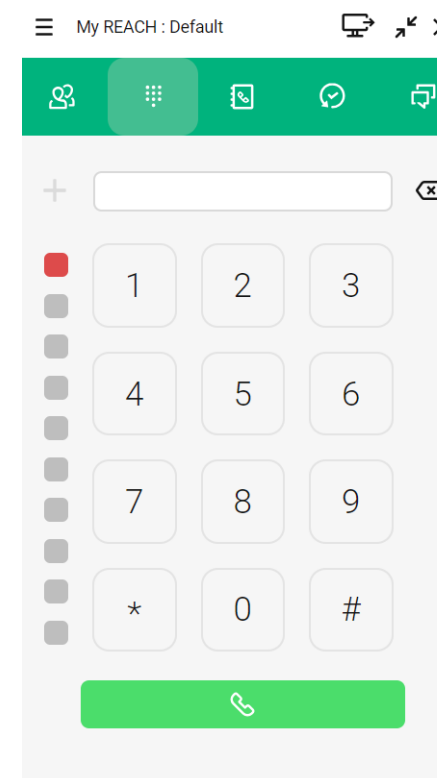


In this scenario, the assistant will not forward a call to the manager as the manager is already in a call.

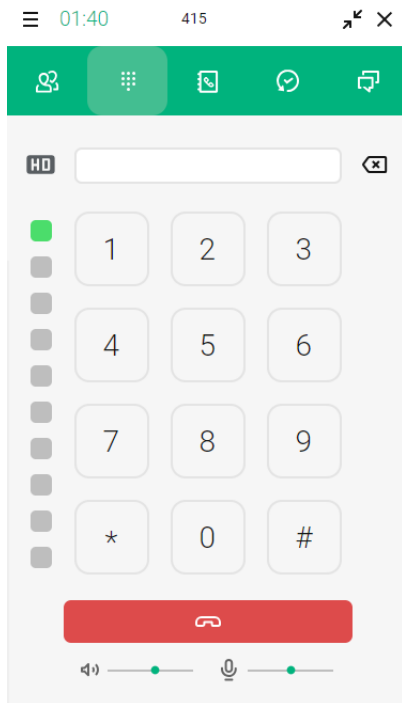
2.5.2 DIALER

To open the dialer, click on .


You can use the Dialer as on a smartphone, initiating calls to fixed and mobile numbers and company extensions.

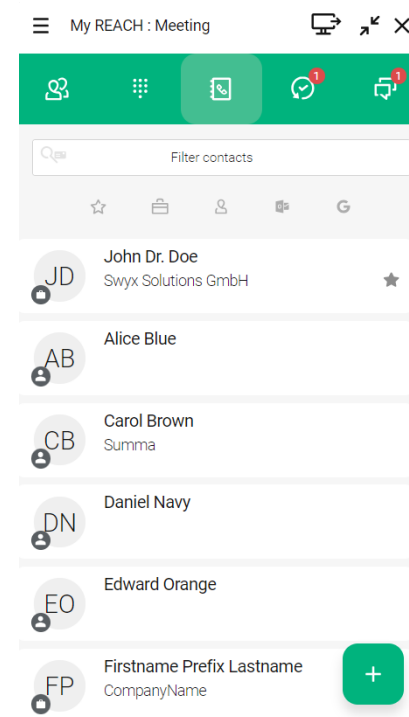


During a call, you can adjust the audio and microphone volume and use the Line keys on the softphone. See also [4.3 Use of two simultaneous softphone calls](#), page 42.



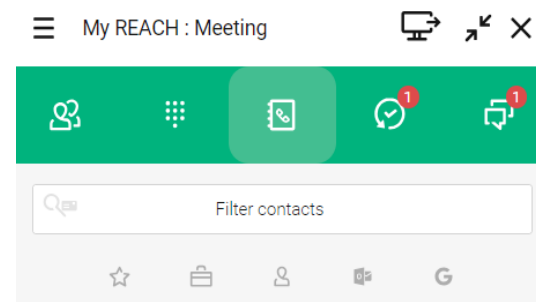
2.5.3 PHONEBOOK

To open the Phonebook, click . The Phonebook contains your external and personal contacts. You can add, modify and remove entries.








Search bar

In the search bar you can search by name and phone number. The search query is remembered when you navigate between the tabs.











You can also filter the entries according to various criteria.

- Activate  to show your Favorites.
- Activate  to show company contacts.
- Activate  to show personal contacts.
- Activate  to show Outlook contacts, if applicable. See 3.8.5.2 *Microsoft integration*, page 32.
- Activate  to show Google contacts, if applicable. See 3.8.5.3 *Google Integration*, page 34.



If you have set contacts in the phone book as favorites, they are displayed at the top. The remaining contacts are listed below in alphabetical order.



To expand the options for a contact

- 1 Move the mouse over a contact.
 - 2 Click on .
 - ✓ The options for the contact will open.
-
- 3 Click an icon to perform an action.
 - Click on  to call the subscriber.
 - Click on  to edit the contact information.
 - Click  to delete the contact.
 - Click on  to add a contact to your Favorites or click on  to remove a contact from your Favorites.
 - If an email address has been provided for the contact, click on  to send an email.
 - Click on  to access the contact information.

Manage personal contacts

You can add a new personal contact to your phonebook and edit or delete an existing personal contact.



To add a new personal contact

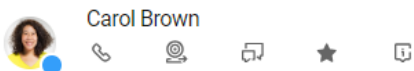
- 1 On the user interface, click on .
 - ✓ The Phonebook opens.
- 2 Click on .
- 3 Enter the desired contact details.
- 4 Click on **Add number**.
- 5 Select the type of number you want to add.
- 6 Click on **OK**.
- 7 Click in the field **Enter number** and enter the phone number of the contact.
- 8 Click on **Save**.
 - ✓ The newly created contact will be added to your Personal Contacts.




The execution of the action may take some time.

To edit an existing personal contact

- 1 On the user interface, click on .
 - ✓ The Phonebook opens.
- 2 Move the mouse over a contact.
- 3 Click on .
 - ✓ The options for the contact will open.



- 4 Click on .
- 5 Update the desired fields.
- 6 Click on **Save**.
 - ✓ The existing contact will be updated.





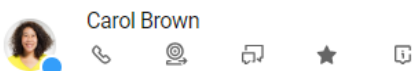
The execution of the action may take some time.




You can edit only personal contacts that are found within Operator. Personal contacts from third-party sources such as Microsoft, Google or a CRM system cannot be edited.

To delete an existing personal contact

- 1 On the user interface, click on .
- ✓ The Phonebook opens.
- 2 Move the mouse over a contact.
- 3 Click on .
- ✓ The options for the contact will open.





- 4 Click on .
- 5 Click on **Yes**.
 - ✓ The contact will be deleted.

Search for contacts within your CRM









Make sure that Contact Connect is activated and that you have a link with your CRM of choice. For further information see [3.8.5.1 Contact Connect](#), page 31.




To search for contacts within your CRM

- 1 On the user interface, click on .
- ✓ The Phonebook opens.
- 2 Enter your search query in the search bar.
- 3 Click on .
 - ✓ You search within your CRM and up to five best fitting results are shown.
 - ✓ Click on the name of the contact to make a direct call.

2.5.4 CALL HISTORY

To open the call list, click . The call list provides an overview of your calls. All missed, received, outgoing calls, received voicemails forwards are displayed.

Symbol	Explanation
	Missed call
	Received call
	Outgoing call
	New voicemail
	Voicemail

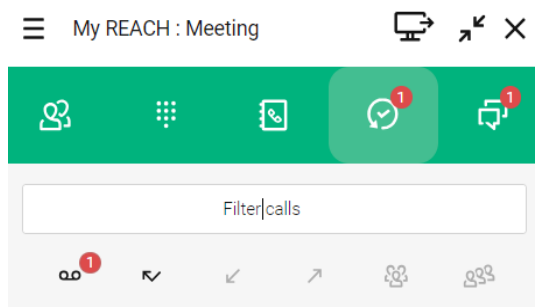
Symbol	Explanation
	Shomi call summary or transcription
	Answered call after forwarding
	Unanswered call after forwarding






Click on the profile picture of an entry to view the contact's user profile and to start a call.




Search bar

In the search bar of the Call History, you can search by name and phone number. The search query is remembered when you navigate between the tabs.



You can also filter the entries according to various criteria.



- Activate  to show all Voicemails.
- Activate  to show all missed calls.
- Activate  to show all received calls.


- Activate  to show all outgoing calls.
- Activate  to show all inbound group calls.
- Activate  to show all calls offered to a queue.







Voicemails

The Call History provides access to your voicemails. You can select individual messages to listen to or remove them.

To listen to your Voicemails

- 1 Click on .
 - ✓ The Call History opens.
- 2 Filter the entries in the Call History by clicking .
 - ✓ All voicemails are displayed.
- 3 Move the mouse over the entry of the voicemail you want to listen to.


 Steve Cardinal
01m 59s





- 4 Click on  to listen to the voicemail or
Click on  to delete the voicemail.

Unresolved phone numbers

You can add contact details to an unresolved phone number in your Call History and add the contact to your Personal Contacts.

To add contact information to an unresolved phone number from the Call History


- 1 On the user interface, click on  .
 - ✓ The Call History opens.
- 2 Move the mouse over the entry with the unresolved phone number.
- 3 Click on +.
- 4 Select the type of number you want to add.
- 5 Click on **OK**.
- 6 Enter the desired contact details.
- 7 Click on **Save**.
 - ✓ The newly created contact will be added to your Personal Contacts.

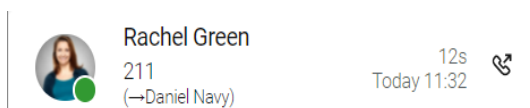



The execution of the action may take some time.

Forwarded calls


The call history displays information about forwards. If you have activated call forwarding and an incoming call is forwarded, an entry appears in the call list.

Example: Rachel Green called you. You have active forward to Daniel Navy. The call is forwarded. Daniel Navy answered the call  :



Example: Rachel Green called you. You have active forward to Daniel Navy. The call is forwarded. Daniel Navy did not answer the call  :

2.5.5 CHAT

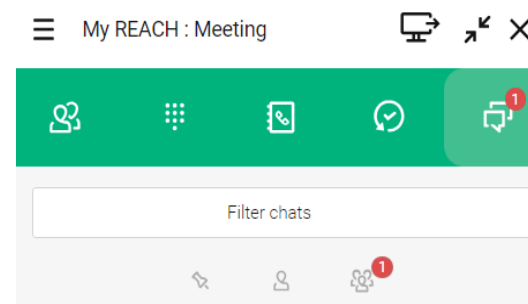
To open the chat, click on  . In the chat you can send messages, start calls and send Meeting Room invitations. Web pages shared in Contact Desktop are displayed as links, shared locations are displayed with Google Maps recognition.






All your messages are also available via Contact Mobile.

Search bar

In the search bar you can search for chats with specific contacts. The search query is remembered when you navigate between the tabs.



You can filter the entries according to various criteria.

- Activate  to show chats that you have pinned.
- Activate  to show single chats or activate  to show group chats.

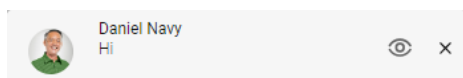


If you have pinned chats, they are displayed at the top. The remaining chats are listed below according to their topicality.



Single Chats

In a single chat, you exchange messages with one participant.

When you receive a chat message, you will get a notification.



To start a single chat


- 1 Click on .
- 2 In the search bar, enter the name of the contact you want to start a chat with.
- 3 Click on the respective Contact.
 - ✓ The chat window opens.
- 4 Enter your message in the message box.
- 5 Click on .
 - ✓ Your message is sent to the respective contact.

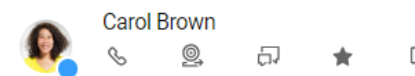
To start a call from a single chat









- 1 Click on .
 - ✓ The chat participant is called.

To expand the options for a Single Chat

- 1 Move the mouse over a chat.

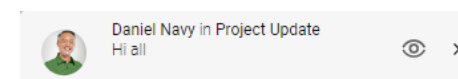
- 2 Click on .
 - ✓ The options for the chat will open.





- 3 Click an icon to perform an action.
 - Click on  to call the subscriber.
 - Click on  to send an invitation to Meeting Room.
 - Click on  to open the chat.
 - Click  to delete the chat.
 - Click on  to pin the chat or on  to unpin the chat.
 - Click on  to mute the chat or on  to unmute and receive notifications in this chat.

Group Chats

In a group chat you exchange messages with several participants. When you receive a message in a group chat, you will get a notification.



To start a new group chat


- 1 Click on  and then on .
- 2 Use the filter function and select the contacts you want to start a group chat with.











- 3 Click on **OK**.

- 4 Enter the group chats name.
- 5 Click on **OK**.
 - ✓ The group chat is created and you can send messages to the participants.


To expand the options for a group chat

- 1 Move the mouse over a group chat.
- 2 Click on .
 - ✓ The options for the chat will open.





- 3 Click an icon to perform an action.
 - Click on  to send a Meeting Room invitation to the members of the group chat.
 - Click on  to open the chat.
 - Click on  to delete the chat, if applicable. You must be the administrator of the group chat to be able to delete it.
 - Click on  to pin the chat or on  to unpin the chat.
 - Click on  to mute the chat or on  to unmute and receive notifications in this chat.
 - Click on  to view the group chat information and edit the group chat, if applicable.

To edit a group chat

- 1 In an group chat, click on .
 - ✓ The name and members of the group chat are displayed.




You can edit the group chat only if you are the administrator of the group chat and have created the group.

- 2 Click on **Edit**.
 - ✓ You can change the name of the group chat, add members  and delete members .
- 3 Click on **OK**.
 - ✓ Your settings are saved.

Meeting Room Invitations

You can send invitations to Meeting Room to participants of a single or group chat.

To invite chat participants to Meeting Room

- 1 In a single or group chat, click on .
 - ✓ The invitation is sent.




An invitation to Meeting Room expires after 15 minutes.

For further information on Meeting Room see *6 Meetings*, page 54.

Sharing files

You can share images, videos and files with your colleagues.

To share files



- 1 In a single or group chat, click on .
- 2 Select the file you want to share.

- 3 Click on **Open**.
 - ✓ The file is sent to the respective contact(s).

Editing and deleting messages

You can edit or delete your own messages.

To edit or delete a message

- 1 Move the mouse over a message in a single or group chat.
- 2 Click on **⋮**.
 - ✓ You can edit  or delete  your message.



Sent files can also be deleted in this way.

2.6 STATUS BAR



You can quickly access important functions via the function bar.

- Menu
- Device selection
- Minimize/Maximize
- Close

2.6.1 MENU

To open the menu, click on **☰**.

You can change various settings in the menu, see [3.8 Settings](#), page 28.

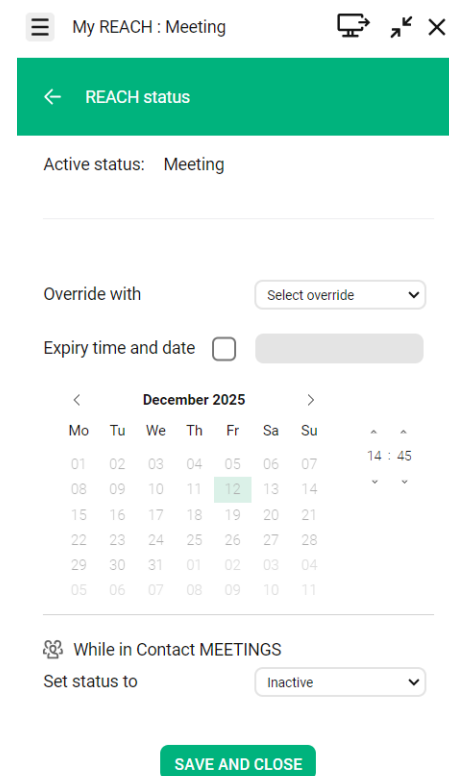
2.6.2 MY REACH OVERRIDE

My REACH shows your current REACH status. Your REACH status depends on the configuration made in the REACH app or in Operator.



You can create one or more status(es) in the REACH app (for Android or iOS) or online (Operator). For more information about REACH, see the documentation for REACH.

To open the REACH status settings, click on your current My REACH Status.



Set manual status override

You can overwrite your current status with a manually set status.

To activate the manual status overwrite

- 1 Click on your **My REACH** status.
- 2 Select the status you want to set manually from the **Override with** dropdown list.
- 3 If required, select the day and time when the manually set status expires.
- 4 Click on **Save and Close**.
 - ✓ Your manually set status override is active.



If the manually set status is activated, the selection of the status "While in Meeting Room" is deactivated or overridden. To use the status "While in Meeting Room", the manually set status must be deactivated.

To deactivate the manual status overwrite

You have set a manual status override.

- 1 Click on your **My REACH** status.
- 2 Click on **Disable override**.
- 3 Click on **Save and Close**.
 - ✓ Your manually set status override is deactivated.

Set status "While in Meeting Room or MS Teams call"

If you can choose between one or more REACH status(es), you can link your status to Meeting Room or MS Teams. The set status with corresponding routing is automatically set as soon as you are in a Meeting Room session or in an MS Teams call. This prevents you from being disturbed by incoming calls during a meeting.



To link your status to Meeting Room or MS Teams, you or your administrator have to create at least one status in the REACH App (for Android or iOS) or online (Operator). For more information about REACH, see the documentation for REACH.

To link your status with Meeting Room or MS Teams

- 1 Click on your **My REACH** status
or
- 1 Click on **Meetings | Status during meeting** in the menu.
 - ✓ The REACH status menu opens.
- 2 At **While in Meeting Room or MS Teams call**, select the status to be set automatically as soon as you are in a Meeting Room session.
- 3 Click on **Save and Close**.
 - ✓ Your REACH settings are saved.
 - ✓ The selected status becomes active as soon as you are in a Meeting Room session or in a MS Teams call.



If you join a Meeting Room session as a guest in a web browser, you must first log in as a moderator in the same web browser to activate your availability and the corresponding REACH status **While in Meeting Room or MS Teams call**.



If you are logged in as a moderator in your meeting room, your availability and the corresponding REACH status "While in Meeting Room" will become active as soon as at least one guest joins your Meeting Room session.




If a manual REACH status override is set, it will remain active while you are in a Meeting Room session or in a MS Teams call. To activate your availability and the corresponding REACH status **While in Meeting Room or MS Teams call**, you must deactivate the manual status override, see *To deactivate the manual status overwrite*, page 19.

To deactivate the linking of your status to Meeting Room and MS Teams





- 1 Click on your **My REACH** status
or
- 1 Click on **Meetings | Status during meeting** in the menu.
 - ✓ The REACH status menu opens.

- 2 At **While in Meeting Room or MS Teams call**, select the status **Inactive** from the drop-down list.
- 3 Click on **Save and Close**.
 - ✓ Your status is no longer linked to Meeting Room or MS Teams.

2.6.3 DEVICE SELECTION


To specify from which device you want to start a call (mobile phone, desk phone or desktop), click on .


To select the device from which you start a call

- 1 In the toolbar, click on “Device selection”  to switch to the end device with which a call is to be made.
 - ✓  Calls are initiated via Contact Desktop.
 - ✓  Calls are initiated via GSM.
 - ✓  Calls are initiated via a desk telephone.


It is also possible to select the device for incoming calls, see [3.2 Incoming device override](#), page 25.

2.6.4 MINIMIZE/MAXIMIZE

To minimize Contact Desktop, click on . The toolbar remains in the foreground if you have selected the corresponding option in the settings.

To enlarge Contact Desktop to the entire user interface, click on .

2.6.5 CLOSE

To close the window of Contact Desktop, click . Contact Desktop will continue to run.

2.7 SOFTPHONE SUPPORT IN A TERMINAL SERVER ENVIRONMENT

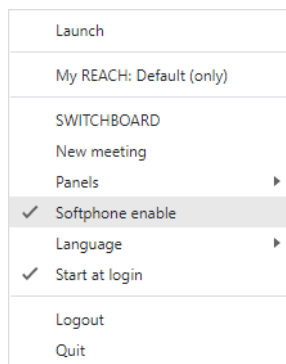
Contact Desktop can also be used on a terminal server to control a softphone on a users computer.

This local softphone is mainly used for voice output and recording via a handset or a headset.

The remote calls via the app on the terminal server are made and received in the exact way as if the calls are made when using Contact Desktop locally. All interactions take place both locally and remotely. The softphone and the locally used audio output devices, such as a headset, are handled by the local Contact Desktop instance.

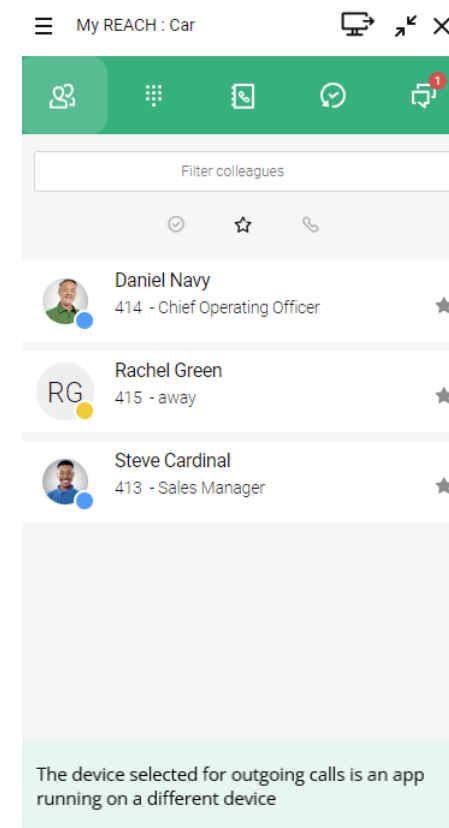
To enable softphone support in terminal server

- 1 Install Contact Desktop on your local device. This local device is connected e. g. with your headset or other audio device you use in combination with Contact Desktop.
- 2 Install Contact Desktop on your terminal server (e. g. Windows Server or Citrix).
- 3 Login with the same credentials to both Contact Desktop instances (local and remote).
- 4 Disable the softphone on your remote Contact Desktop instance. You can do this via the context menu in the tray and unmark **Softphone enable**.



In case your terminal server does not have audio driver, the softphone on your remote Contact Desktop instance is already disabled.

- ✓ After every login to the remote Contact Desktop instance or when changing the outgoing device to **Softphone**, the application will recognize it is running in a remote setup.



2.8 CONTEXT MENU OPTIONS

You can access the context menu by right-clicking on the Contact Desktop icon in the notification area of your Windows PC or by clicking on the Contact Desktop icon in the menu bar of your Mac.

Option	Explanation
Starting	The application is launched and Contact Desktop opens.

Option	Explanation
My REACH override	You can set your manual REACH status if necessary or deactivate the override of your status, see <i>Set manual status override</i> , page 18.
SWITCHBOARD	The SWITCHBOARD interface opens, see <i>To log in to SWITCHBOARD</i> , page 27.
Meetings	Your Meeting Room room opens, see <i>Meetings</i> , page 54.
Panels	You can expand your Contact Desktop interface with additional windows, see <i>Panels</i> , page 22.
Softphone enable	To start and receive calls, your softphone must be enabled. You can tell that your softphone is enabled by the tick in front of this option.
Language	You can select the language in which Contact Desktop should be displayed.
Start at Login	Enable this option to start Contact Desktop automatically every time you start your PC.
Help	The online help for Contact Desktop opens.
Log out	Logs the current user off from Contact Desktop.
Quit	Exits the Contact Desktop application.

Panels


You can select, which panels you want to open besides your Contact Desktop window. You can drag and drop the windows to the desired position on the screen and you can scale the windows.

- Show all
- Online (Show colleagues who are online)
- Favorites
- Colleagues (only for SWITCHBOARD users)
- My queues
- Queue Login



To open the panel “Colleagues” you need a valid license for the SWITCHBOARD option. SWITCHBOARD can optionally be added to Contact Desktop as an add-on.


How to open Panels

- 1 Right-click on the Contact Desktop icon  in the notification area of your Windows PC or click on the Contact Desktop icon in the menu bar of your Mac.
 - ✓ The Contact Desktop context menu opens.
- 2 Select **Panels**.
- 3 Click on the panel you want to open.
 - ✓ The panel opens.

2.9 SHORTCUTS

You can perform certain functions using shortcuts.



Mac users must press the Command key (Cmd)  instead of "Ctrl" for the shortcuts.

General shortcuts (Contact Desktop is active but in the background)

Action	Shortcuts
bringing Contact Desktop to the foreground	Ctrl + Alt + C
bringing Contact Desktop to the foreground and answer an incoming call	Ctrl + Alt + A
bringing Contact Desktop to the foreground and rejecting an incoming call	Ctrl + Alt + H


Call control on incoming call (Contact Desktop in foreground)

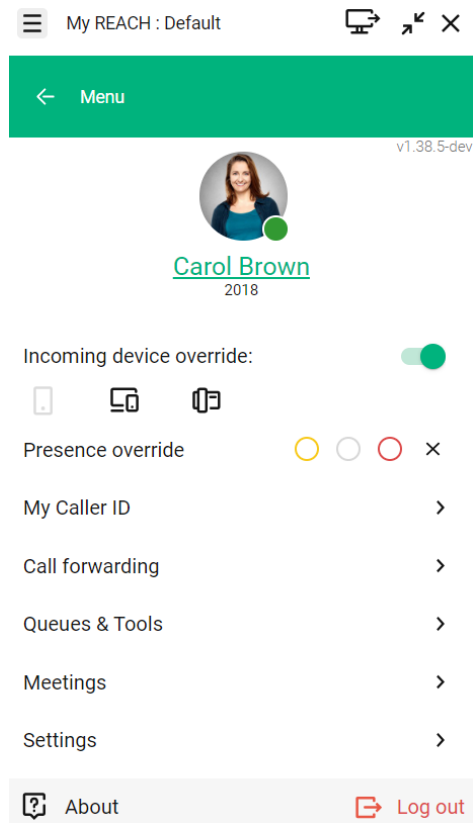
Action	Shortcuts
Answer incoming call	Ctrl + Alt + A
Reject incoming call	Ctrl + Alt + H
Transfer incoming call to a contact (without consultation)	Ctrl + Alt + F
Start transfer without consultation	Ctrl + Alt + B
Forward incoming call to your voicemail	Ctrl + Alt + V

Call control on active call (Contact Desktop in foreground)

Action	Shortcuts
End a call	Alt + H
Switch end device	Alt + D
Hold Switch	Alt + P
Transfer to a contact (opens the options for selecting the transfer type)	Alt + F
Start transfer with consultation	Alt + C
Confirm transfer after consultation	Alt + T
Start transfer without consultation	Alt + B
Start or merge audio call with 3 participants	Alt + M
Toggle between calls during consulted transfer	Alt + Up arrow or Alt + Down arrow

3 CONFIGURE CONTACT DESKTOP

Click on  to open the menu.



You can make various configurations.

[Profile](#)

[Incoming device override](#)

[My Caller ID](#)

[Presence overwrite](#)

[Queues & Tools](#)

[Meetings](#)

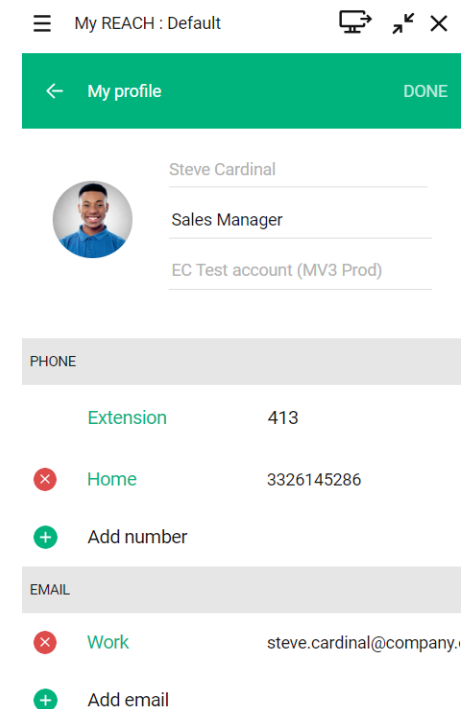
[Settings](#)

3.1 PROFILE

Your profile contains user-specific information. You can change your profile picture, job title and add phone numbers or email addresses.

To edit your profile

- 1 In the menu, click on your name.
- 2 Click on **Edit**.



- You can customize your profile picture, job title, phone number(s) and email address.
- Click on **Save** to save your changes.
 - ✓ Your changes are saved and are visible to your contacts.

3.2 INCOMING DEVICE OVERRIDE

You can configure on which device incoming calls are offered.

To select which device will signal incoming calls

- Activate the **Incoming device override** option in the menu.
- Click on the device on which you want to receive calls for you.

Incoming device override:



Symbol colour	Explanation
Grey	The device is available but is not selected.
Black	The terminal device is selected. Incoming calls are signalled on this terminal.
Greyed out	The device is not available.

3.3 PRESENCE OVERWRITE

You can change your presence status manually via Contact Desktop. If you manually configure your status, the system will present you to other users in your organization as defined in *Status Display*, page 9.

To set your presence status

- In the line **Presence override**, select one of the following options:

Icon	Explanation
	Click on the yellow circle to set your status to Away (Yellow).
	Click on the grey circle to set your status to Show as offline (grey). Select this function to hide their presence.
	Click on the red circle to set your status to Busy (red).
	Click the cross icon to stop overwriting the presence status manually via Client. Your presence is automatically updated again and falls back to the status Available (green) when you are available in Contact Desktop. Your status is changed to Busy (red) when you have a voice call or a meeting via Meeting Room.



To see how your manually selected status in Contact synchronizes with your status in Microsoft Teams, and vice versa, see *Impact of Microsoft Teams Status on Contact Status*, page 33 and *Impact of Contact Status on Microsoft Teams Status*, page 33.

3.4 MY CALLER ID

You can specify whether your phone number should be signalled by default for external calls. And if so, which of your phone numbers is displayed to your call partner.

To hide your caller ID

- Click on **My Caller ID** in the menu.
- Activate the option **Hidden**.
- Click on **SAVE**.
 - ✓ Your phone number will no longer be displayed when you are making external calls.

To define which of your numbers is to be signalled by default

- 1 Click on **My Caller ID** in the menu.
- 2 If you want your default number displayed, activate **Automatic**. If you want a specific number of yours displayed, deactivate the option **Automatic** and activate the option **Manual**.
- 3 You can filter by **Personal** or **Company** numbers.
- 4 Select the number you want to display for outgoing external calls by activating the radio button for the desired number.
- 5 Click on **SAVE**.
 - ✓ The number you chose is now displayed when you are making external calls.

3.5 CALL FORWARDING

You can set conditional or unconditional call forwarding to your voicemail or a phone number.

To set an Unconditional Forward

- 1 Click on **Call forwarding** in the menu.
- 2 Move the **Enable** slider to the right.
- 3 Select **Activate Unconditional Forward**.
- 4 Select **Voicemail** to forward calls to your voicemail or
- 4 Select **Number** to forward calls to a phone number or to a colleague in your contact list.
- 5 Select a contact from the drop-down list or enter a phone number.
- 6 Click on **Save**.
 - ✓ Call forwarding is active.



You can tell that unconditional forwarding is active by the changed status on the user interface. This also indicates that calls are being forwarded to

voicemail or one of your contacts   

To set Conditional Forward

- 1 Click on **Call forwarding** in the menu.
- 2 Move the **Enable** slider to the right.
- 3 Select **Activate Conditional Forward**.
- 4 Enter a timeout (between 1 and 90 seconds) that determines when incoming calls are forwarded.
- 5 Select **Voicemail** to forward calls to your voicemail or
- 5 Select **Number** to forward calls to a phone number or to a colleague in your contact list.
- 6 Select a contact from the drop-down list or enter a phone number.
- 7 Click on **Save**.
 - ✓ Call forwarding is active.

3.6 QUEUES & TOOLS

Queues & Tools gives you an overview of all Contact Queue Management Tools. You can access your DialoX Inbox, Qboard and Switchboard directly from here. You can also log in to or log out of queues.

The queue tools give you a graphical overview of all waiting fields (queues) in your company for efficient and convenient call management in a challenging environment.

Option	Explanation
Inbox	Opens the DialoX Inbox platform, if the licences required are available. For more information see manuals.dialox.ai/inbox/inbox/

Option	Explanation
Qboard	Opens the Qboard Dashboard
Switchboard	Opens Switchboard
Queue Login	Opens all queues you can log in to or out of.
Back to previous queues	Logs you in to the previous queues you logged out from.
Log out of all queues	You will be logged out from all queues. You have to confirm.

To log in to QBOARD

- 1 Click on **Queue Tools** in the menu.
- 2 Click on **QBOARD**.
✓ You will be automatically logged on to QBOARD.

For more information about QBOARD, see the documentation for QBOARD.

To log in to SWITCHBOARD



You need a valid license for the SWITCHBOARD option. SWITCHBOARD can optionally be added to Contact Desktop as an add-on.

- 1 Click on **Queues & Tools** in the menu.
- 2 Click on **SWITCHBOARD**.
✓ You will be automatically registered with SWITCHBOARD.

For more information about SWITCHBOARD, see the documentation for SWITCHBOARD.

To log in and off queues

- 1 Click on **Queues & Tools** in the menu.

- 2 Click on **Queue Login**.
✓ The list of all queues appears.
- 3 Slide the slider next to each queue to the right (activated) to log in to a queue or to the left (deactivated) to log out of a queue.
- 4 Click on **Save**.
✓ You are logged on to the queue or logged off from the queue.



The number of logged-in users in a queue is displayed next to the corresponding switch. If the icon is red and the number 1 is shown, you are the last logged-in participant in this queue.

To log off from all queues simultaneously

- 1 Click on **Queues & Tools** in the menu.
- 2 Click on **Log out of all queues**.
✓ You are logged off from all queues.



When you have logged out of all queues, you can log in again to the queues you were previously logged in to by clicking the "Back to the previous queues" button. The number of queues concerned is shown in the brackets.

3.7 MEETINGS

You can start a meeting with Meeting Room during or outside a call. For more information on starting meetings, see *6 Meetings*, page 54.

To log in as a moderator

- 1 Click on **Meetings** in the menu.
- 2 Select **New meeting**.
✓ The conference room of the meeting opens.

To copy your meeting link

- 1 Click on **Meetings** in the menu.

- 2 Select **Copy room link**.
 - ✓ The link to your conference room has been copied to the clipboard and you can send it by pasting it e.g. in an e-mail.

To join a meeting as a guest

- 1 Click on **Meetings** in the menu.
- 2 Select **Join meeting**.
- 3 Enter the meeting ID or name.
- 4 Click on **OK**.
 - ✓ The meeting waiting room opens.

For more information about Meeting Room, see the documentation for Meeting Room.

Set status "While in Meeting Room"

If you can choose between one or more status(es), you can link your status to Meeting Room. The set status with corresponding routing is automatically set as soon as you are in a Meeting Room session. This prevents you from being disturbed by incoming calls during a meeting.



To link your status to Meeting Room, you or your administrator have to create at least one status in the REACH App (for Android or iOS) or online (Operator). For more information about REACH, see the documentation for REACH.

To link your status with Meeting Room

- 1 Click on your **My REACH** status
or
Click on **Meetings | Status during meeting** in the menu.
 - ✓ The REACH status menu opens.
- 2 At **While in Meeting Room**, select the status to be set automatically as soon as you are in a Meeting Room session.

- 3 Click on **Save and Close**.
 - ✓ Your REACH settings are saved.
 - ✓ The selected status becomes active as soon as you are in a Meeting Room session.



If you join a Meeting Room session as a guest in a web browser, you must first log in as a moderator in the same web browser to activate your availability and the corresponding REACH status **While in Meeting Room**.



If you are logged in as a moderator in your meeting room, your availability and the corresponding REACH status **While in Meeting Room** will become active as soon as at least one guest joins your Meeting Room session.



If a manual REACH status override is set, it will remain active while you are in a Meeting Room session. To activate your availability and the corresponding REACH status **While in Meeting Room**, you must deactivate the manual status override, see *To deactivate the manual status overwrite*, page 19.

To deactivate the linking of your status to Meeting Room

- 1 Click on your **My REACH** status
or
- 1 Click on **Meetings | Status during meeting** in the menu.
 - ✓ The REACH status menu opens.
- 2 At **While in Meeting Room**, select the status **Inactive** from the dropdown list.
- 3 Click on **Save and Close**.
 - ✓ Your status is no longer linked to Meeting Room.

3.8 SETTINGS

You can configure various settings.

Numbering plans

Audio settings

[Video settings](#)[Notification settings](#)[Integration settings](#)[Colleagues list settings](#)[Shomi settings](#)[Further settings](#)

3.8.1 NUMBERING PLANS

You can manage accessibility in your company using the numbering plans option. In a numbering plan, your organization's phone numbers can be linked to internal extensions to route incoming calls in a controlled manner. By setting up time configurations linked to numbering plans, you can automatically manage how and at what time your organization can be reached.

To make changes in numbering plans

- 1 Click on **Settings** in the menu.
- 2 Select **Numbering plans**.
- 3 If applicable, select the numbering plan scheme for which you want to make changes.



If your organization provides only one numbering plan scheme, this step will be skipped.

- ✓ The available numbering plans of the selected numbering plan scheme are displayed, as well as the type of activation and the currently active numbering plan.
- 4 Select an available numbering plan or select **Use timetable**.
 - 5 Click on **Save**.
 - ✓ The changes in the numbering plan are saved and the numbering plan scheme becomes active.



To access the options in numbering plans in Contact Desktop, users must have the **Time Configuration** permission. This permission can be granted by an administrator in the Operator web portal. For more information, refer to the Managed Voice 3 manual.

Possible types of activation

Depending on the selection you have made, you have various options for making changes to the numbering plan. The type of activation is displayed in green when you select a numbering plan scheme.

Display	Explanation
Plan is activated by timetable	The numbering plan is activated according to a configured timetable. Deactivate by manually selecting another numbering plan.
Plan is activated manually	The numbering plan was activated manually. You can select another numbering plan or use the "Use timetable" option.
Plan is activated by holiday table	The numbering plan can only be activated and deactivated in the Operator web portal. For more information, refer to the Managed Voice 3 manual.

3.8.2 AUDIO SETTINGS

You can set whether you want to use the loudspeaker and microphone of your end device or a connected headset for making calls. You can choose how an incoming call is signalled and select ringtones for calls.

To specify the audio settings

- 1 Click on **Settings** in the menu.
- 2 Select **Audio Settings**.
 - Microphone
Specify which microphone you want to use for making calls.
 - Start echo test

Click on **Start Echo Test** to test the audio output

- Speakers
Specify which speaker you want to use for making calls.
 - Headset control
Specify whether you want to use headset control and which headset control you want to use. For more information on using a headset, see *4.4 Using a headset*, page 42.
 - Ringing
Specify the device for ringtone output.
- 3 Use the slider to set the desired volume for each.
 - 4 Click on **Save**.
✓ Your settings are saved.



If you are using a headset, under Ringing, select "Communication" | "<Headset type>" if you want to hear the ring tone through your headset, see also *4.4 Using a headset*, page 42.

To set ringtones

- 1 Click on **Settings** in the menu.
- 2 Select **Audio Settings**.
- 3 Activate the ringtone by selecting **Softphone ringing sound**.
- 4 Specify the desired ringtone in the respective drop-down list.
 - Internal call
 - External call
 - Second call
- 5 If desired, deactivate the **Dialpad audio feedback** option if you want to mute the sound of the dialpad.
- 6 Click on **Save**.
✓ Your settings are saved.


3.8.3 VIDEO SETTINGS

You can select the camera for video calls and take a picture that you can use as a profile picture.

To set the video settings for the camera

- 1 Click on **Settings** in the menu.
- 2 Select **Video Settings**.
- 3 From the drop-down list, select the video source you want to use to make video calls.
- 4 Click on **Save**.
✓ Your settings are saved.

To take a profile picture

- 1 Click on **Settings** in the menu.
- 2 Select **Video Settings**.
- 3 Click on .
 - ✓ The web camera takes a picture.
- 4 Click the button again to take a new photo.
 - ✓ The web camera takes another photo. The previous photo is deleted.
- 5 Click on **Use as profile picture**.
✓ The photo is saved as your profile picture.

3.8.4 NOTIFICATION SETTINGS

You can specify how notifications for events are displayed or disable notifications.

You can specify the following notification settings:

- Call control
- Meeting notifications
- Missed call notifications
- Voicemail notifications
- Transcription notifications
- Desktop chat notifications

Activate the check box next to the notifications you would like to get and click on **SAVE**.

3.8.5 INTEGRATION SETTINGS

Under Integration Settings you will find an overview of available integrated applications. Slide the switch to the right to activate an application or to the left to deactivate it.

Contact Connect

Microsoft integration

Google Integration

URL-Based Call Control Integration

3.8.5.1 CONTACT CONNECT

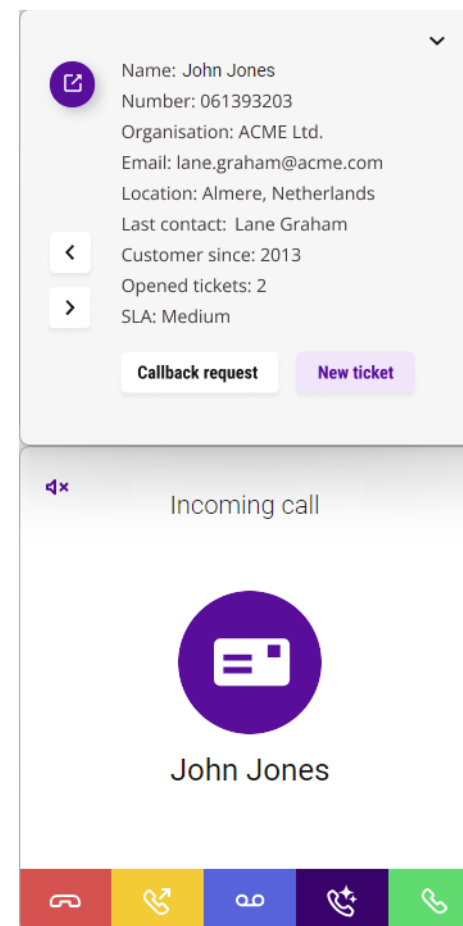
Contact Connect allows you to integrate Contact Desktop with your Customer Relationship Management (CRM) or Enterprise Resource Package (ERP) or with your contacts database.



To use the Contact Connect integration in the Contact Desktop client, you will need the Contact Connect Tool, which can be downloaded from <https://desktop.summa.io>, or alternatively, you can use the webconfigurator available at <https://contactconnect.summa.io>.

You can use Contact Connect to configure various display settings and up to two action buttons. For more information, please refer to the Contact Connect documentation.

When activated, incoming calls are recognized and if the caller's phone number exists in your CRM, ERP or contact database, the name and company name and, if applicable other details of the respective contact will be displayed in a notification.



If you have multiple CRM or ERP systems linked to Contact Desktop, click on **<** or **>** to switch between applications.



This functionality is available with the Contact Connect add-on.

To enable the Contact Connect Integration

- 1 Click on **Settings** in the menu.

- 2 Select **Integration settings**.
- 3 Activate the option **Contact CONNECT**.
 - ✓ The integration with your CRM or ERP system is active.

3.8.5.2 MICROSOFT INTEGRATION

Microsoft Integration allows you to integrate your Microsoft 365 contacts within Contact Desktop. Incoming calls from one of your Outlook contacts are displayed with the Microsoft integration in Contact Desktop. You can also find your Outlook contacts in the phonebook in Contact Desktop.

In addition, you can synchronize your presence status with Microsoft Teams. Status changes in Contact Desktop are reflected in Microsoft Teams, and vice versa. See *Microsoft Teams Presence Synchronization*, page 32 and *Impact of Contact Status on Microsoft Teams Status*, page 33.



This functionality is only available with the add-on Contact Connect.



If you have already logged in once with your Microsoft 365 account, see *Login with Microsoft 365 Credentials*, page 6, you no longer need to re-authenticate when enabling the Microsoft integration.

To enable Microsoft Integration

To activate the integration with Microsoft, you must log in to the Microsoft portal once.

- 1 Click on **Settings** in the menu.
- 2 Select **Integration settings**.
- 3 Activate the option **Integration with Microsoft**.
 - ✓ The following dialog appears:

The screenshot shows the Microsoft sign-in interface. At the top left is the Microsoft logo. Below it is the heading 'Sign in'. There is a text input field with the placeholder text 'Email, phone, or Skype'. Underneath the input field are three links: 'No account? Create one!', 'Can't access your account?', and 'Sign-in options'. At the bottom right, there are two buttons: a grey 'Back' button and a blue 'Next' button.

- 4 Enter your Microsoft e-mail address.
- 5 Click on **Next**.
- 6 Enter your password.
- 7 Click on **Log in**.
- 8 It is recommended to enable the **Do not show again** option so that you don't have to log in every time you use the integration with Microsoft.
- 9 Click on **Yes**.
 - ✓ The interface is set up. Your Microsoft contacts are displayed in Contact Desktop.

Microsoft Teams Presence Synchronization

The Microsoft Teams presence synchronization ensures that your current status is consistently aligned between Contact and Microsoft Teams. This includes busy, available, away, and in-call states, and works in both directions so that changes in either application are reflected in the other.

Requirements for presence synchronization

To ensure that presence synchronization between Contact Desktop and Microsoft Teams works correctly, the username must be identical in both systems.

- The username used in Contact Desktop must exactly match the User Principal Name (UPN) of the Microsoft Entra ID account (e.g. first-name.lastname@company.com).
- Microsoft aliases are not supported, when used no presence synchronization will take place.

To enable Microsoft Teams presence synchronization

You can synchronize your Microsoft Teams presence status with your Contact Desktop presence status.

- 1 Click on **Settings** in the menu.
- 2 Select **Integration settings**.
- 3 Activate the **Presence integration** option.
 - ✓ Your Contact Desktop presence status is synchronized with your Microsoft Teams presence status.



If you have already used Contact Desktop with a previous presence integration, you must disable both Microsoft and presence integration in the integration settings and then re-enable them to update your presence in Microsoft.

The following tables describe the synchronization rules. How a status set in Microsoft Teams (manually or automatically) is reflected in Contact, and how an Contact status is reflected in Microsoft Teams.

Impact of Microsoft Teams Status on Contact Status

Teams Status (set by user)	Teams Status (set automatically, based on activity)	Resulting Contact Status
Available	Available	Available

Teams Status (set by user)	Teams Status (set automatically, based on activity)	Resulting Contact Status
	Available, out of office	Available
Busy	Busy	Busy
	in a call	in MS Teams call
	in a meeting	in calendar meeting
Do not disturb	in a call, out of office	in MS Teams call
		Busy
	Presenting	in MS Teams call
Away	Away	Away
	Away last seen <time>	Away
Be right back		Away
Appear offline		No synchronization
	Offline	No synchronization



Presence synchronization only works if the username in Contact Desktop matches the User Principal Name (UPN) of the Microsoft Entra ID account. Microsoft aliases are not supported. See *Requirements for presence synchronization*, page 33.

For more information on how your Contact status is displayed to users in your organization, see *Status Display*, page 9.

Impact of Contact Status on Microsoft Teams Status

Contact Status (set by the user)	Contact status (set automatically, based on the activity or via REACH)	Resulting Microsoft Teams Status
	Available	No synchronization

Contact Status (set by the user)	Contact status (set automatically, based on the activity or via REACH)	Resulting Microsoft Teams Status
Busy		No synchronization
	In a call	In a call
	In Meeting Room	In a call
Appear away	Away	No synchronization
Appear offline	Offline	No synchronization



Presence synchronization only works if the username in Contact Desktop matches the User Principal Name (UPN) of the Microsoft Entra ID account. Microsoft aliases are not supported. See *Requirements for presence synchronization*, page 33

For more information on how to override your status in Contact, see 3.3 *Presence overwrite*, page 25.

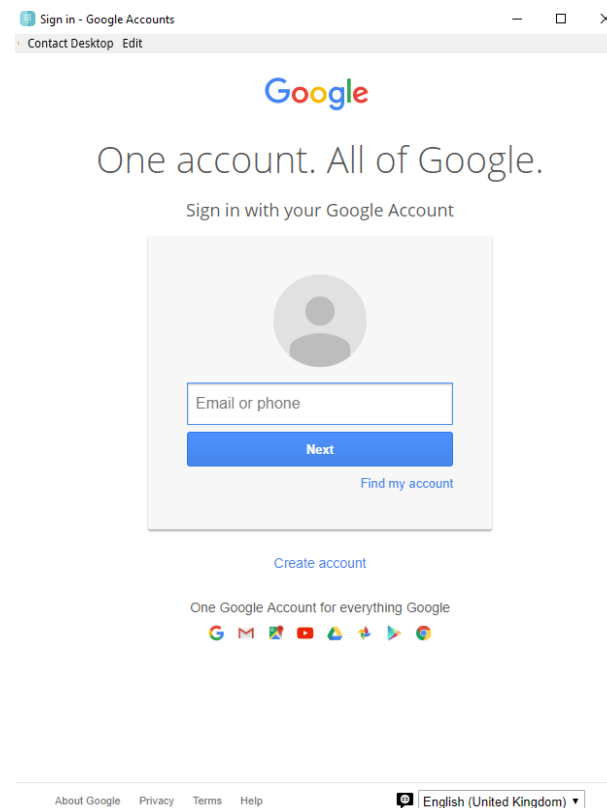
3.8.5.3 GOOGLE INTEGRATION

Google Integration allows you to integrate your Google contacts with Contact Desktop. An incoming call from one of your Google contacts is displayed with the contact's name in Contact Desktop using Google integration. All your Google contacts can also be found in Contact Desktop under **Phonebook**.

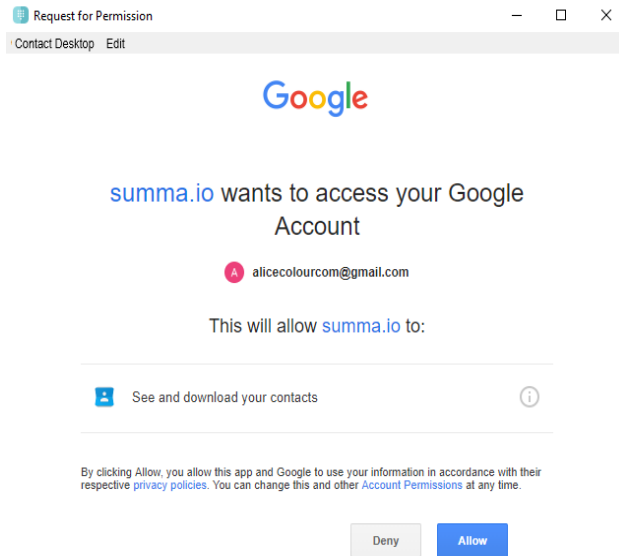
To enable Google Integration

To activate the integration with Google, you have to register once at the Google portal.

- 1 Click on **Settings** in the menu.
- 2 Select **Integration settings**.
- 3 Activate the option **Integration with Google**.
 - ✓ The following dialog appears:



- 4 Enter the email address associated with your Google Account.
- 5 Click on **Next**.
- 6 Enter your password.
- 7 Click on **Registration**.
- 8 It's recommended to enable the **Stay signed in** option so that you don't have to sign in every time you use Google integration.
- 9 Click on **Log in**.
 - ✓ The following dialog appears:

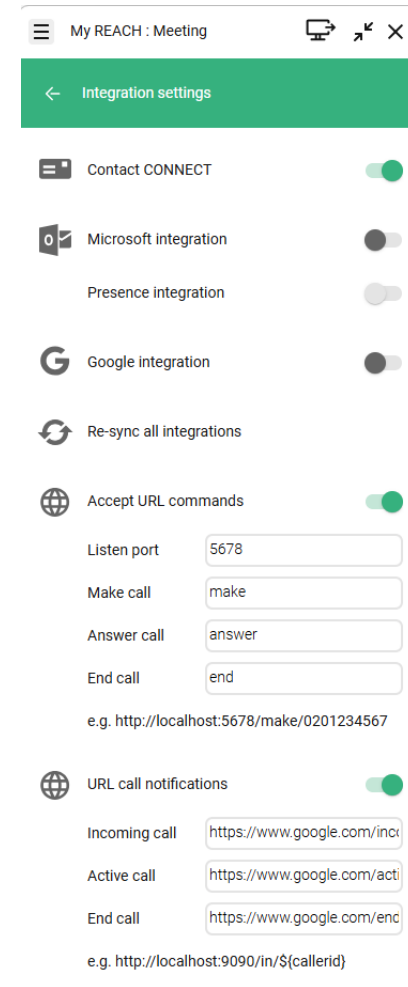


- 10 Click on **Allow**.
 - ✓ The interface is set up. Your Google contacts are displayed in Contact Desktop.

3.8.5.4 URL-BASED CALL CONTROL INTEGRATION

These features enable URL-based interaction and allow seamless integration with third-party software such as CRM and enterprise systems. The application supports two complementary mechanisms: receiving command URLs for remote call control and sending webhook notifications to forward call events to external services.

These URL commands can also be triggered locally on a Mac using AppleScript. This allows macOS users to start, answer, or end calls directly from small scripts,



Function	Direction	Purpose
Accept URL Commands	Third-party application (e.g. CRM) → Contact Desktop Client	Allows third-party applications to control call actions via HTTP requests. The URL commands must match the exact format expected by the Contact Desktop Client.

Function	Direction	Purpose
URL Call Notifications	Contact Desktop Client → Third-party application (e.g. CRM)	The client automatically informs other applications when calls start, become active, or end. The configured URLs must follow the format required by the receiving third-party application to ensure proper processing.

This makes it possible to control calls from other applications and to keep systems synchronized automatically.



All applications have to run on the same computer (PC or Mac).

Accept URL Commands

With **Accept URL Commands**, other systems can control calls in the application by sending simple web requests (URLs).

When this option is enabled, the application opens a local HTTP listener on the specified port and waits for incoming command URLs. These commands can trigger call actions remotely.

Option	Explanation
Listen Port	The network port the application uses to receive commands. The external system must send requests to this port.

Option	Explanation
Make Call	This field defines the command segment used to trigger an outbound call through a URL request. To dial a number, the third-party sends an HTTP request to the listener port, including both the command keyword and the destination phone number. Example: <i>http://localhost:5678/make/020123456</i> When accessed, this URL causes the application to immediately start dialing 020123456.
Answer Call	This field defines the command used to accept incoming calls via a URL request. When a call is ringing, the third-party system can trigger this endpoint to instruct the application to answer the call automatically. Example: <i>http://localhost:5678/answer</i> When executed, the application answers the current incoming call.
End Call	URL path used to end the current call. Example: <i>http://localhost:5678/end</i>

URL Call Notifications

With **URL Call Notifications**, the application automatically informs other systems when certain call events occur.

When enabled, the application sends a notification (HTTP request) to a predefined URL. These notifications can include information such as the caller number.

Option	Explanation
Incoming Call	Sends a notification when a new call is received. A request is sent to the configured URL Example: <code>https://example.com/incoming?callerid=\$callerid</code>
Active Call	Sends a notification when a call is answered. Example: <code>https://example.com/active?callerid=\$callerid</code>
End Call	Sends a notification when a call ends. Example: <code>https://example.com/end?callerid=\$callerid</code>

3.8.6 COLLEAGUES LIST SETTINGS

You can specify which action Contact Desktop will perform when you click on a colleague in the contact list. You can filter the information that will be displayed.

To set the Colleagues list settings

- 1 Click on **Settings** in the menu.
- 2 Select **Colleagues list settings**.
- 3 Select the desired setting:

Option	Explanation
Show groups	Click the check box to enable or disable the display of groups in your contact list.
Show queues	Click the check box to enable or disable the display of Queues in your contact list.

- 4 Click on **Save**.
✓ Your settings are saved.

To set the option "Click on a colleague in the list to"

- 1 Click on **Settings** in the menu.
- 2 Select **Colleagues list settings**.
- 3 Select one of the following options from the drop-down list:
 - Expand tile
 - Call user ext
 - Open chat
- 4 Click on **Save**.
✓ Your settings are saved.

3.8.7 SHOMI SETTINGS

You can customize different settings and behaviors of Shomi.

To customize Shomi settings

- 1 Click on **Settings** in the menu.
- 2 Select **Shomi**.
- 3 Select the desired setting:

Option	Explanation
Shomi on top of the list	Click the check box to enable to always display Shomi at the top of your contact list.
Automatically email the summaries	Click the check box to automatically send the summaries generated by Shomi via email.

3.8.8 FURTHER SETTINGS

Start at login

If you have activated the **Start at login** option Contact Desktop will be started automatically every time you start your computer.

Status bar on top

Enable this option to see the status bar in the foreground when you minimize Contact Desktop.

Call control shortcuts

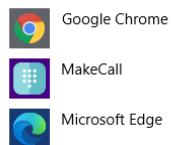
Enable this option to control calls using keyboard shortcuts.

Click to dial

Enable this option to make a call by clicking a phone number in the web browser.

For the use of the application "Dialer" a one-time permission is requested.

How do you want to open this?



Always use this app

OK

- 1 Select "MakeCall" and activate the checkbox **Always use this app**.
- 2 Click on **OK**.
 - ✓ The call is set up.

Dial hotkey

Specify which hotkey you want to use to dial a highlighted phone number and make a call.

Select language

Select the language in which Contact Desktop should be displayed:

- Danish
- German
- English
- Spanish
- Latvian
- Dutch

Tooltips

Enable this option to see tooltips when hovering over specific icons.

3.9 ABOUT

You can view the version of your desktop app and access the online help, the Data Privacy Statement and the End User Licence Agreement.

3.10 LOG OUT

To log out from Contact Desktop

- 1 Click on **Log out** in the menu.
 - ✓ You are no longer logged in to Contact Desktop and will no longer receive calls and notifications.

4 CALLING WITH CONTACT DESKTOP

In this chapter you will find detailed descriptions of the Contact Desktop telephony functions.

Contact Desktop has a softphone that allows you to receive and initiate calls via the desktop and to use various call control options. The basic scenarios are explained below.



Calls are managed via the softphone. If you are logged on to a alternative device, a window opens when a call comes in on one of the additionally connected devices. The call can be transferred, forwarded and terminated. You can change the device without interrupting the call.

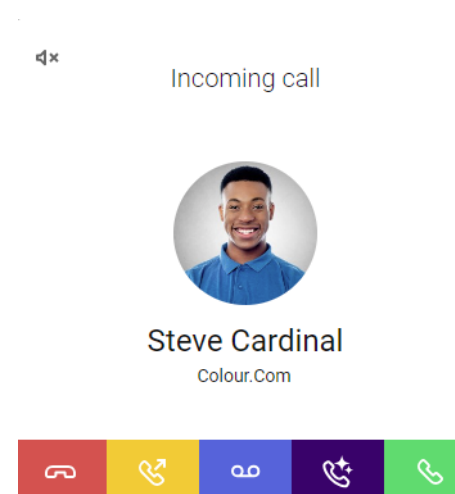


Calls made in HD voice quality are indicated by an icon in the call control




4.1 INCOMING CALL

If you receive a call, a call is forwarded to you, or a call is received by a group of which you are a member, an **Incoming Call** pop-up window appears containing the caller's contact information.




To answer a call

- 1 When you receive an incoming call, click the  icon in the pop-up window or on the toolbar.
 - ✓ You can now make calls to your call partner via the integrated input and output devices or via a headset.




Privacy group members can see the status of other members in the list and answer a call on their behalf.

To reject a call

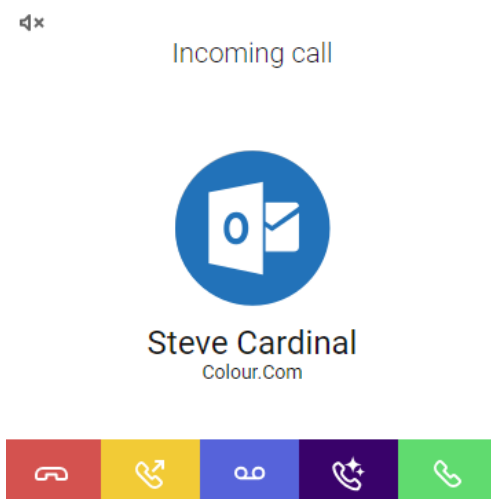
- 1 When you receive an incoming call, click the  icon in the pop-up window or on the toolbar.
 - ✓ The call attempt is interrupted immediately.

To mute the ringtone on an incoming call

- 1 When you receive an incoming call, click the  icon at the upper left of the pop-up window.
 - ✓ The ringtone is muted.

Incoming calls from Outlook or Google contacts


With Microsoft and Google integration, incoming calls from one of your Outlook or Google contacts are displayed with names in Contact Desktop.



For further information see also [3.8.5 Integration settings](#), page 31.

To forward an incoming call to your voicemail


You are receiving a call.

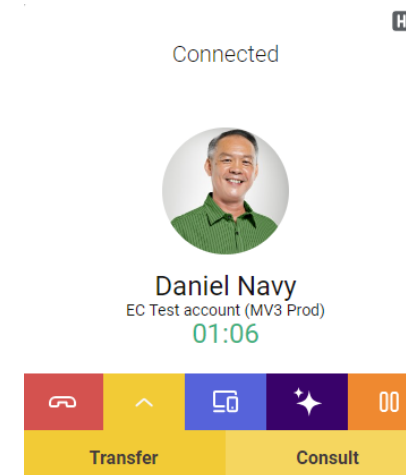
- 1 Click on  .
 - ✓ The call is immediately forwarded to your voicemail.

4.2 TRANSFERRING CALLS

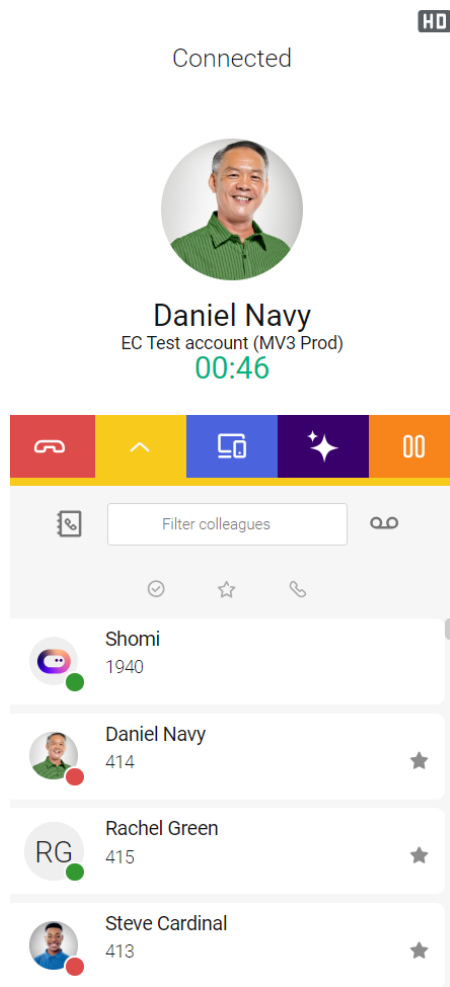
With Contact Desktop you can easily transfer an incoming or answered call to another contact or to another device.

To transfer an active call to another contact



- 1 During a call, click on  .
 - ✓ The contact selection menu appears.



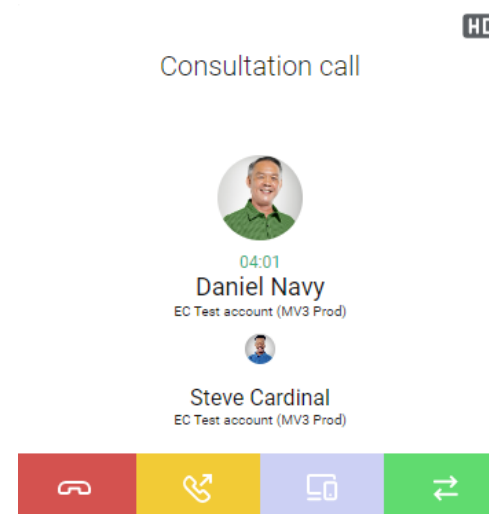
- 2 Click on **Transfer** to transfer the call without consultation or click on **Consult** to start a consultation call.
 - ✓ In any case a menu for contact selection appears.





You can choose whether to select a contact from your phonebook or from your colleague list.


- 3 Click  next to the search bar to display your phonebook.
- Click  next to the search bar to view your list of colleagues.
- 4 Click on the respective contact.

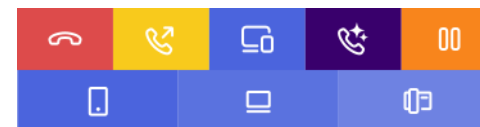
If you have decided to consult, the first subscriber is put on hold and you can call and consult with the other subscriber.



- 5 Click on  to switch between parties.
- 6 Click on .
- 7 Click on **Transfer** to connect the participants with each other. or
- 8 Click on **Conference** to start a conference with both participants.

To transfer an active call to one of your devices

- 1 During a call, click on .
- 2 Select the device to which you want to forward the call from the list displayed.



✓ The selected device rings.

- 3 Answer the call on the device.
 - ✓ You can continue the call.

4.3 USE OF TWO SIMULTANEOUS SOFTPHONE CALLS

The Contact Desktop softphone has two lines.

You can easily put a call on hold and start a second call and switch between lines at the click of a mouse.




You can manage the lines using the dialer, see 2.5.2 *Dialer*, page 10.

Hold

Use the **Hold** function to put the currently active call on hold, for example if you want to make an enquiry or start a second call. When a call is put on hold, your conversation partner hears music on hold.

To put a call on hold

You are having a telephone conversation on a line.

- 1 Click on .
 - ✓ The Dialer opens.
- 2 Click on the line with the active call .
 - ✓ The call will be placed on hold, and your conversation partner will hear music on hold. The line symbol turns red .

Click once again on this line to re-activate a connection on hold.


Switch between Lines


You can switch between your lines. If you have a call on a line and switch to another line, your call will be held. The subscriber will hear music on hold.


Switching between different lines is also called Call Swap.

Switch between Lines

If you have two connections, you can switch between the active connection and the connection on hold.

The active line is indicated by the green line key . The line on

hold is indicated by the red line key .

- 1 Click on the line with the held connection .
 - ✓ The active call is now on hold and the previously held call now becomes active.

4.4 USING A HEADSET

You can set up preferences that allow you to perform various call control functions using the buttons on your headset. You can use the buttons on your headset to answer, end, reject, and mute calls.



You must select the preferred device in the audio settings in Contact Desktop. This is mandatory for Headset control. The selection **System default** will not allow headset integration.



The **General** setting under **Headset control** connects headsets to Contact Desktop based on Human Interface Device (HID) support. Headsets also connect to Microsoft Teams based on HID support. If multiple applications attempt to use the headset at the same time, calls may be interrupted or the headset controls may be temporarily unavailable.

Jabra headsets

If you have a Jabra headset, it is recommended to select **Jabra** under **Headset Control**. This provides the best experience for Jabra headsets (see *List of supported Jabra headsets*, page 44).

If you regularly make calls with Microsoft Teams in addition to Contact Desktop, it is recommended that you use a Jabra headset and set **Headset control** to **Jabra**. With Jabra, Contact Desktop and Microsoft Teams can work side by side without interrupting or dropping calls.

Headsets from other vendors

If you use a headset from another vendor, you can select the **General** setting under **Headset control** (various headsets from Poly and Yealink, among others, are supported, see *Support for headsets from other manufacturers*, page 45). This setting is used to connect headsets with HID (Human Interface Device) support to Contact Desktop.

For example, if you have a Poly or Yealink headset and never or rarely make calls with Microsoft Teams, you can set the **Headset control** to **General**. As long as you are not calling through Microsoft Teams, calls from Contact Desktop will not be disconnected.

For example, if you have a Poly or Yealink headset and make regular calls with Microsoft Teams, you can set the **Headset control** to **Disabled** if desired. Then, Contact Desktop and Microsoft Teams can work side by side without interrupting or dropping calls. However, you will then not be able to use the headset buttons in Contact Desktop (to answer, end, reject and mute calls via the headset buttons).




Currently, Microsoft Teams does not yet offer an option to disable headset controls within Teams (if it did, headset buttons could still be used within Contact Desktop).

Headset support

You can use features of headsets in Contact Desktop. For example, if you want to answer a call, you can do so directly from your headset. Below is an example of what is possible with the Jabra Evolve 65 and 75.

Jabra Evolve 65

RIGHT EARCUP








Turn headset on/off	Slide the On/Off/Bluetooth switch to On or Off
---------------------	---

Jabra Evolve 75

Answer call	Press the Answer/End call button
End call	Press the Answer/End call button
Play/pause music	Hold (1 sec) the Answer/End call button
Reject call	Double-tap the Answer/End call button
Volume up/down	Press the Volume up or Volume down button
Next track	Hold (1 sec) the Volume up button
Previous track	Hold (1 sec) the Volume down button
Battery status	Press the Volume up or Volume down button, when not on a call or listening to music

Jabra Evolve 75

Function	Action
 Headset on/off	Slide the On/off/connect switch
Answer/end call	Tap the Multi-function button
Reject call	Double-tap the Multi-function button
 Battery and connection status	Tap the Multi-function button when not on a call
Enable/disable Voice prompts	Press and hold the Multi-function button while turning on the headset
 Adjust volume	Tap the Volume up or Volume down button
Manual busylight on/off	Simultaneously tap the Volume up and Volume down buttons
 Enable/disable Busylight function	Simultaneously press and hold (3 secs) the Volume up and Volume down buttons
 Mute/unmute microphone	Press and hold (2 secs) the Volume down button

List of supported Jabra headsets



Note that you select the **Jabra** option under **Headset Control** in the audio settings.

Biz	Engage	Evolve	Evolve 2	Link	Pro	Speak
Biz 1500	Engage 50	Evolve 20	Evolve 2 40	Link 360	Pro 930	Speak 410
Biz 2300	Engage 65	Evolve 30	Evolve 2 55	Link 370	Pro 935	Speak 510
Biz 2400	Engage 75	Evolve 40	Evolve 2 65	Link 380	Pro 9450	Speak 710
		Evolve 65	Evolve 2 80		Pro 9470	Speak 750
		Evolve 65e				Speak 810
		Evolve 65t				
		Evolve 75				
		Evolve 75e				
		Evolve 80				



You can find all manuals for the above supported Jabra headsets and features at <https://www.jabra.com/support>.



It is recommended to use the dongle of the Jabra headset, which may be included in the delivery, in combination with Contact Desktop.

Support for headsets from other manufacturers



Note that you select the **General** option under **Headset Control** in the audio settings.

Poly/Plantronics				
Blackwire	BT	Calisto	D series	Savi
Blackwire C420	BT300C	Calisto 3200	D100	Savi 8200 UC
Blackwire C510	BT600	Calisto 5300		
Blackwire C520	BT700			
Blackwire C725				
Blackwire 3315				
Blackwire 5210				



It is recommended to use the dongle of the Poly headset, which may be included in the delivery, in combination with Contact Desktop.

Yealink			
CP	UH	WDD	WH
CP700	UH36	WDD60	WH62
	UH38		WH66



It is recommended to use the dongle of the Yealink headset, which may be included in the delivery, in combination with Contact Desktop.

Gigaset
ION



It is recommended to use the dongle of the Gigalink headset, which may be included in the delivery, in combination with Contact Desktop.

5 SHOMI - YOUR PERSONAL ASSISTANT

Shomi is an advanced communication enhancement tool designed to streamline interactions, improve productivity, and facilitate efficient information retrieval. The platform offers automated features that optimize call handling, voicemail management, and in-person meeting documentation.

Overview

Shomis intelligent transcription and analysis features ensure that users can efficiently interact with recorded content, extract actionable insights and maintain continuity in their communications.

The following features are available:

[Call Recording & Analysis](#)

[Smart Voicemail Transcription](#)

[Intelligent Call Screening](#)

[In-Person Meeting Capture](#)

[Interactive Transcription Capabilities](#)

[Language output Using Shomi Personal Assistant via Feature Codes](#)

[Start Shomi call-analysis automatically via Reach](#)

[Chat](#)

[Data Protection & AI Model Usage](#)

5.1 FEATURES

Call Recording & Analysis

- **Transcription:** Calls are transcribed after the call, eliminating the need for manual note-taking.
- **Conversation Analysis:** Extracts key insights, action items and sentiment analysis from call transcripts.
- **Call analysis:** Provides contextual summaries to streamline post-call actions.

See [5.4.2 Call analysis](#), page 49.

Smart Voicemail Transcription

- **Text-based Voicemail:** Converts voicemail messages into text format.
- **Quick preview:** Gives a brief summary as a headline of what the voicemail is about.
- **Context Preservation:** Ensures critical information is accurately documented and easily accessible.

Intelligent Call Screening

- **AI-assisted call answering:** Responds to incoming calls and gathers caller details.
- **Caller Identification:** Recognizes the caller and captures their intent.
- **Smart Routing:** Enables informed decision-making before answering or redirecting calls.

See [5.4.1 Call screening](#), page 48.

In-Person Meeting Capture

- **Real-time Recording:** Records and transcribes conversations to write minutes for later reference
- **Automated Organization:** Categorizes and stores conversations in an accessible history.
- **Retrieval & Searchability:** Enables seamless recall of key moments and decisions.

See [5.4.3 Record a meeting](#), page 51



When using Shomi, additional costs may be incurred depending on your subscription. If you have any questions, please contact your administrator.

Interactive Transcription Capabilities

Shomi enhances user engagement with recorded conversations by providing:

- **Advanced Search Functions:** Locate specific topics or phrases within transcriptions.
- **Contextual Insights:** Offers deeper analysis and connections between conversations.
- **Follow-up Integration:** Assists in tracking pending actions based on conversation history.

Language output

Shomi uses the language of the country code of the caller or would fall back to the language of the user set in the backend.

The transcription and the summary will be in the language spoken.

The language in which Shomi speaks to the user is the language set in Contact Desktop, see [Select language](#), page 38.



You can have Shomi translate the transcribed text into a language of your choice.

Using Shomi Personal Assistant via Feature Codes

When users have no access to the Contact Desktop client, users can also start or stop Shomi with recording the conversation by dialling the following feature access codes during the call:

Function	Key combination
Start Shomi call-analysis	*4
Stop Shomi call-analysis	*5

Start Shomi call-analysis automatically via Reach

Users can also automatically start Shomi call-analysis when they answer a call. This can be enabled by enabling the 'Auto start call-analysis' option in a Reach profile. When this Reach profile is active all calls will be automatically be answered when the call starts. See [10.2 Setting up the REACH profile](#), page 83 in the Contact Documentation for more information on how to configure Reach.




If the administrator has activated the [Auto start call-analysis](#) option for a REACH profile of yours, you will receive an e-mail notification that all calls will be answered by Shomi as soon as the REACH profile is activated.

5.2 CHAT

The Shomi Chat currently offers a basic functionality: it provides a self-description within the chat.

To chat with Shomi

- 1 Click on  to open the chat.
- 2 Click on the entry [Shomi - Personal Assistant](#), to open the chat with Shomi.
- 3 You can ask questions about the Shomis functionality and possibilities, e. g. "How can I record a meeting?"
 - ✓ Shomi responds on the basis of this documentation.






The Shomi Chat feature is currently under further development. Upcoming improvements may be deployed automatically. Please stay tuned for further enhancements.

5.3 DELETING CONVERSATION DATA

It is possible to delete conversation data (audio and text) that is no longer needed.

To delete conversation data from a call summary

- 1 On the user interface, click on .
 - ✓ The Call History opens.
- 2 In the entry you want to delete the conversation data from, click on .
- 3 Click on .
 - ✓ You are asked to confirm, to delete all conversation data (audio and text) from this call.
- 4 Click on **YES**.
 - ✓ All conversation data from this called is deleted and no longer accessible.

5.4 EXAMPLES

Shomi enhances your daily workflow in multiple ways, making tasks more efficient and seamless. Explore the examples below to see how.

[Call screening](#)

[Call analysis](#)

[Record a meeting](#)

5.4.1 CALL SCREENING

You receive an incoming call while busy. You can let Shomi answer the call and ask what the calling reason is to decide whether you want to take it or forward it, e.g. to a colleague or to your voicemail.



If somebody calls with a suppressed or unknown number, let Shomi answer the call, and learn who and why you are being called. This way you can sort out spam calls.

To let Shomi answer a call

You receive an incoming call.




Incoming call



Carol Violet
+31 123 456 789

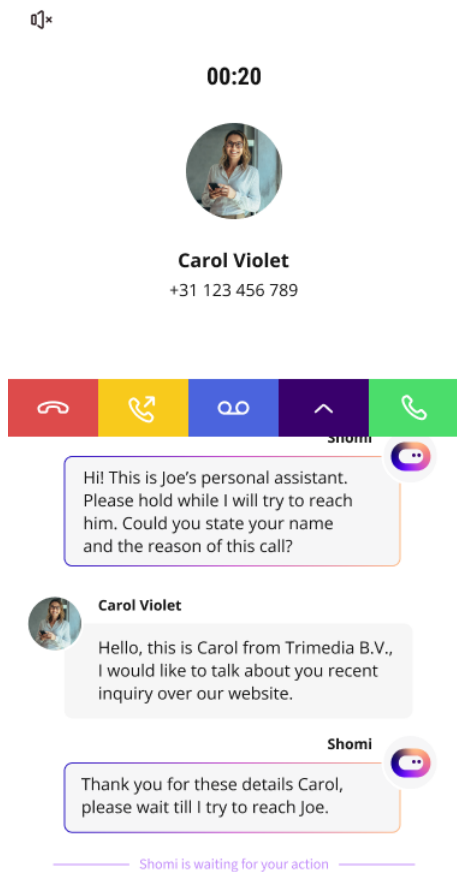


- 1 Click on .
 - ✓ The Shomi dialogue appears.
- 2 Click on **YES, PLEASE**.

Shomi answers the call and asks the caller about the intention of the call.

The caller can now provide their name and intent.

- ✓ Shomi analyses the callers description and transcribes it into a text message for you.




- ✓ The call will be put on hold, for you to decide what to do. You have multiple options:

- 3 To forward the call to a colleague or number, click on .

To forward the call to your voicemail, click on .

To accept the call click on .

To deny and end the call, click on .

5.4.2 CALL ANALYSIS

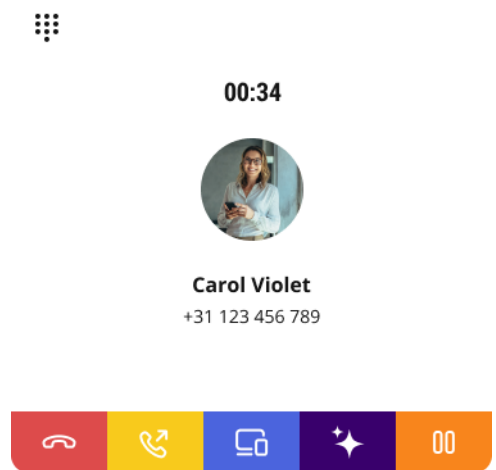
You are in a phone call. You would like to have the information from the call summarized after the call.



Ensure that you inform the person you are talking to that the call is being recorded and ask for their consent. For more information on data protection, see *5.5 Data Protection & AI Model Usage*, page 52. Please also comply with the policies of your company and the data privacy laws of your country.

To let Shomi analyse a call

You are in an active call.



1 Click on .

- ✓ Both parties hear the announcement, that the call recording has started. This may vary depending on the settings and country.



2 When you want to pause or stop the call recording, click on



- ✓ Both parties hear a beep, to signal that the call recording has stopped.

After a certain time, depending on the length of the conversation, you'll get a notification that the call summary is ready.



3 Click on  in the notification or go to the [Call history](#), hover over the call and click on .

- ✓ Shomi shows a call summary and asks you how you want to process the summary.

You have multiple options:

4 Click on one of the [suggestions](#) Shomi offers:

Command	Explanation
Extended summary	Shomi gives you a more detailed call summary.
Translate	Shomi translates the call summary. Choose the language you want the call summary translated to.
E-Mail	Shomi will send you the call summary via email.
Action Points	Shomi will summarize the call in action points

or



Ask Shomi any question about the call.

- ✓ Shomi will answer you in a chat message.

Call summary actions

In addition to the suggestions Shomi offers, you can work directly with the call summary.

To edit the call summary

1 Click on  in the notification or go to the [Call history](#), hover over the call and click on .



2 Click on .


3 You can now review the text and make manual adjustments, if needed.

4 Click on .

- ✓ Your changes are saved and Shomi sends the edited version of the call analysis to the chat.

To share the call summary

1 Click on  in the notification or go to the [Call history](#), hover over the call and click on .

2 Click on .

3 Choose one of the following options:

- **SEND TO CRM**

- ✓ The call summary will be send directly to your linked CRM tool, including all call information.



This functionality is available with the CRM integration and Contact Connect add-on.



- **EMAIL**


- ✓ The call summary will be send to your email address.

- **CANCEL**

- ✓ The sharing process is cancelled and no data is sent.

To copy the call summary

- 1 Click on  in the notification or go to the [Call history](#), hover over the call and click on .

- 2 Click on .
 - ✓ The call analyses is copied to your clipboard. You can now paste the text into any application.



The Shomi - Personal Assistant feature is currently under further development. Upcoming improvements may be deployed automatically. Please stay tuned for further enhancements.

5.4.3 RECORD A MEETING

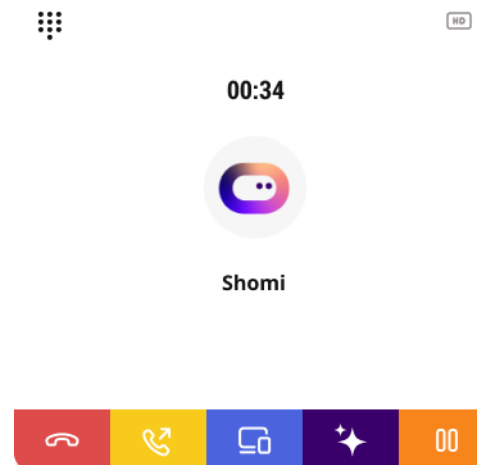
With Shomi it is particularly easy to record meetings, summarize them and send meeting minutes.



Ensure that you inform the person you are talking to that the call is being recorded and ask for their consent. For more information on data protection, see [5.5 Data Protection & AI Model Usage](#), page 52. Please also comply with the policies of your company and the data privacy laws of your country.



To let Shomi record a meeting

- 1 Call Shomi from your contact list.



- ✓ Shomi starts recording and analysing.
- 2 Leave the call open during the meeting.
 - 3 When the meeting is finished, end the call with Shomi. After a certain time, depending on the length of the meeting, you'll get a notification that the call summary is ready.



- 4 Click on  in the notification or go to the **Call history**, hover over the call and click on .
- 5 Click on **Action Points** to get meeting minutes.
- 6 Click on **E-Mail** and confirm the email address you want the meeting minutes send to or type in another email address.
 - ✓ The meeting summary and or meeting minutes are send to you via e-mail.

5.4.4 SMART VOICE TO TEXT

You receive a voicemail or have Shomi summarize a call. Based on the transcription a Quick preview is automatically generated.

Functionality:

Automatic Transcription

Incoming voicemails or recorded calls are processed using speech-to-text technology to produce an accurate transcript of the spoken content.

Conversation Analysis

The transcript is analyzed to identify important keywords, topics, and conversational context. This metadata is used to enhance searchability and insights.

Quick Preview Generation

A concise text summary (Quick Preview) is created from the transcription. This allows users to quickly understand the purpose or topic of the call without listening to the full recording. Hover the mouse over the call history entry to see the quick preview.

5.5 DATA PROTECTION & AI MODEL USAGE

Searchable Call List

The Quick Preview can be used as a filter or keyword for locating calls in the call history. Users can search using phrases or key terms derived from the preview content.

Compliance with Data Protection Policies

Shomi ensures full compliance with Data Protection Policies in all its operations. The transcription process utilizes:

- Service operated by Microsoft in Europe
- Service operated by Google in Europe
- Service operated by Speechmatics in Europe

For interaction with Shomi on a transcript, the following AI model is used:

- Service operated by Google and Microsoft in Europe

Data Usage & Retention

- As Shomi leverages paid services from Microsoft, Google and Speechmatics, all hosted in Europe, user data is not used for AI model training.
- Transcripts and recordings are stored in Enreach data centers as part of the service, with a current retention period of one month. The retention policy is under continuous evaluation and updates will be provided as necessary.
- Voicemail transcripts are retained for a period of 90 days.

AI Model Assessment & Optimization

In response to the evolving AI landscape, Shomi continuously evaluates AI models to identify more efficient and cost-effective solutions while maintaining strict adherence to Data Protection Policies.

Contact EULA

Please find the latest Contact End User Licence Agreement under the following web link:

<https://summa.io/contact-eula/>

Contact Data Privacy Statement

We value your privacy and are committed to protecting your personal data.

Please find the latest Data Privacy statement under the following web link:




<https://summa.io/privacy-policy/>

6 MEETINGS

Contact Desktop offers a seamless integration with the Meeting Room solution, allowing users to easily access all virtual meeting and communication features. By linking both solutions, users can schedule, start and manage meetings directly from the application without having to switch between different platforms. This facilitates daily collaboration and increases the efficiency of communication.

6.1 STARTING A MEETING

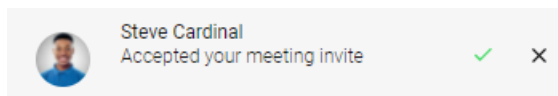
To invite a contact from your contact list to Meeting Room


- 1 Open the contact list  .
- 2 Expand the options for the contact you want to invite to Meeting Room by clicking on  .
- 3 Click on the meeting invitation icon  .
 ✓ The invitation is sent.

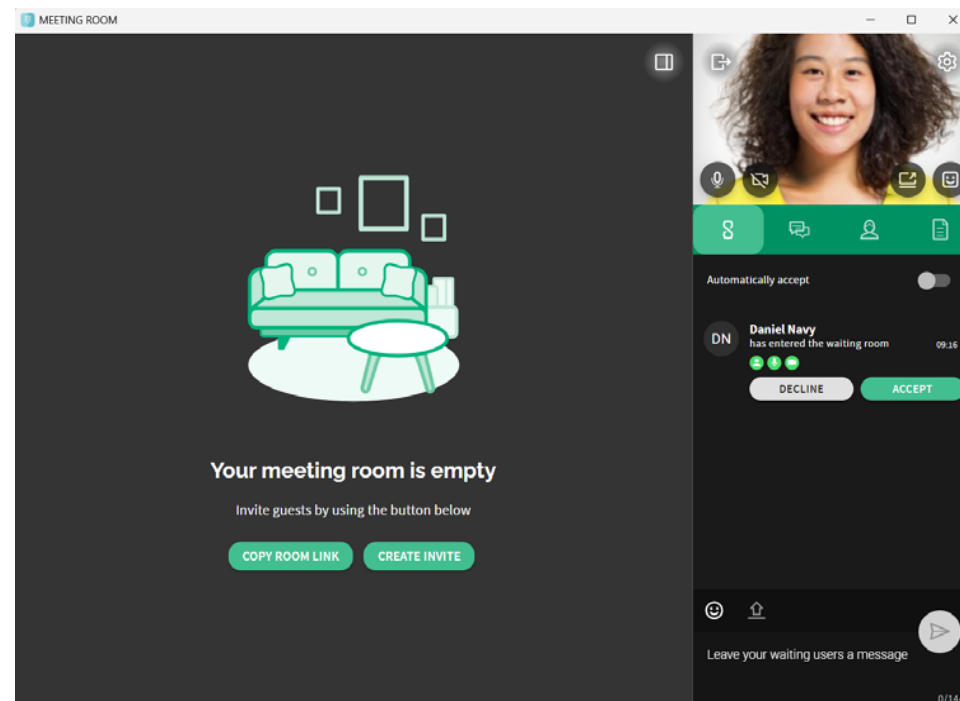


You can view, edit or delete the invitation in the chat of the contact.

- 4 If the invited guest has accepted the Meeting Room invitation, you will receive a notification.



- 5 Click on  .
 ✓ The conference room of the meeting opens.






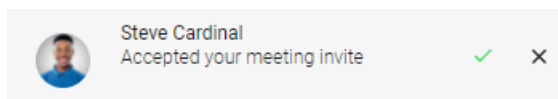
- 6 Click on **ACCEPT** to accept the guest's participation.
 ✓ The guest attends the meeting.
 or
- 7 Click **DECLINE** to decline the guest's participation.
 ✓ The guest will receive a notification of rejection, but can request to participate again at any time.




To ensure that you are not disturbed during a Meeting Room session, you can set a "While in Meeting Room" status. The status is activated as soon as you are in a meeting with at least one participant. You will not be disturbed by incoming calls during the meeting, as these will be routed depending on the configuration in the REACH app or in Operator, see *Set status "While in Meeting Room or MS Teams call"*, page 19.




To start a meeting from a single chat

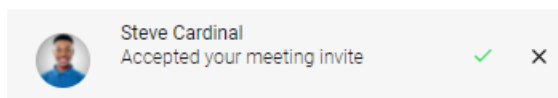
- 1 Open the chat .
- 2 Expand the options for the contact you want to invite to Meeting Room by clicking on .
- 3 Click on the meeting invitation icon .
 - ✓ The invitation is sent.
- 4 If the invited guest has accepted the Meeting Room invitation, you will receive a notification.




- 5 Click on .
 - ✓ The conference room of the meeting opens.

To start a meeting from a group chat

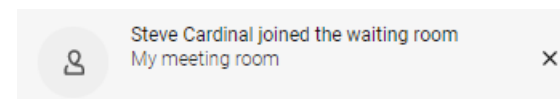
- 1 Open the chat .
- 2 Expand the options for the group you want to invite to Meeting Room by clicking .
- 3 Click on the meeting invitation icon .
 - ✓ The invitation is sent to all members of the group chat.
- 4 If the invited guest has accepted the Meeting Room invitation, you will receive a notification.



- 5 Click on .
 - ✓ The conference room of the meeting opens.

To accept or decline guests outside your organization

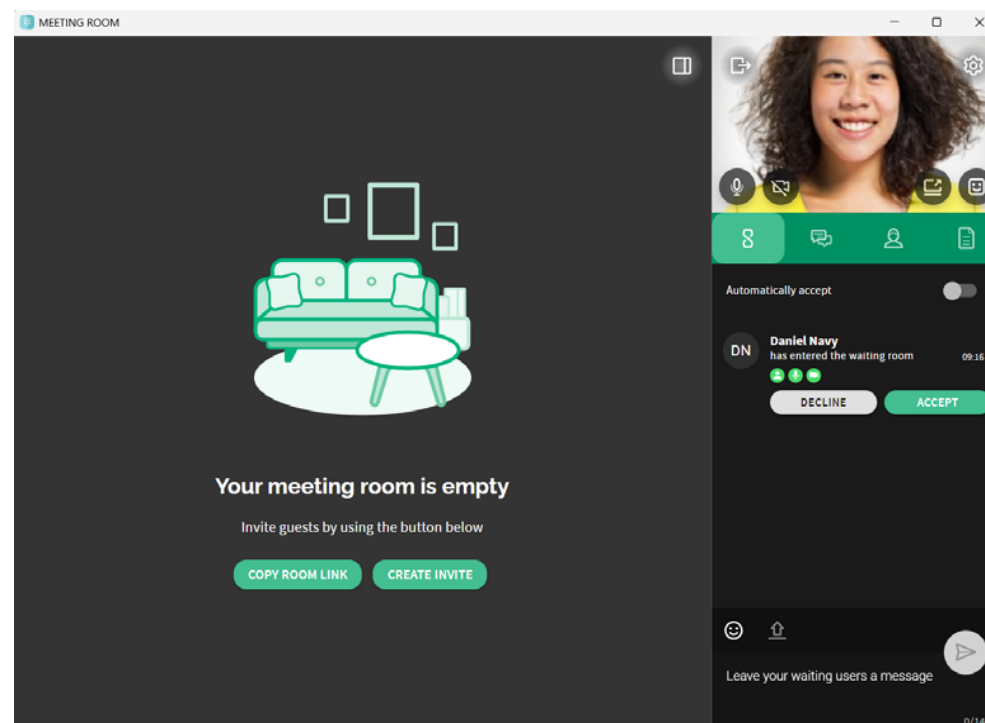
- 1 You will receive a notification that someone outside your organization is entering the waiting room.



- 2 Click on  to ignore the request.

or

- 2 Click on the grey area to go directly to the meeting room.



- 3 Click on **ACCEPT** to accept the guest's participation.
 - ✓ The guest attends the meeting.
- or
- 4 Click **DECLINE** to decline the guest's participation.
 - ✓ The guest will receive a notification of rejection, but can request to participate again at any time.

6.2 JOINING A MEETING

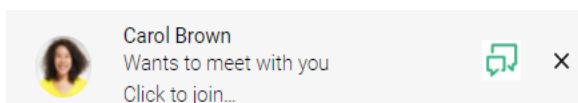
You can accept a Meeting Room invitation directly through Contact Desktop.





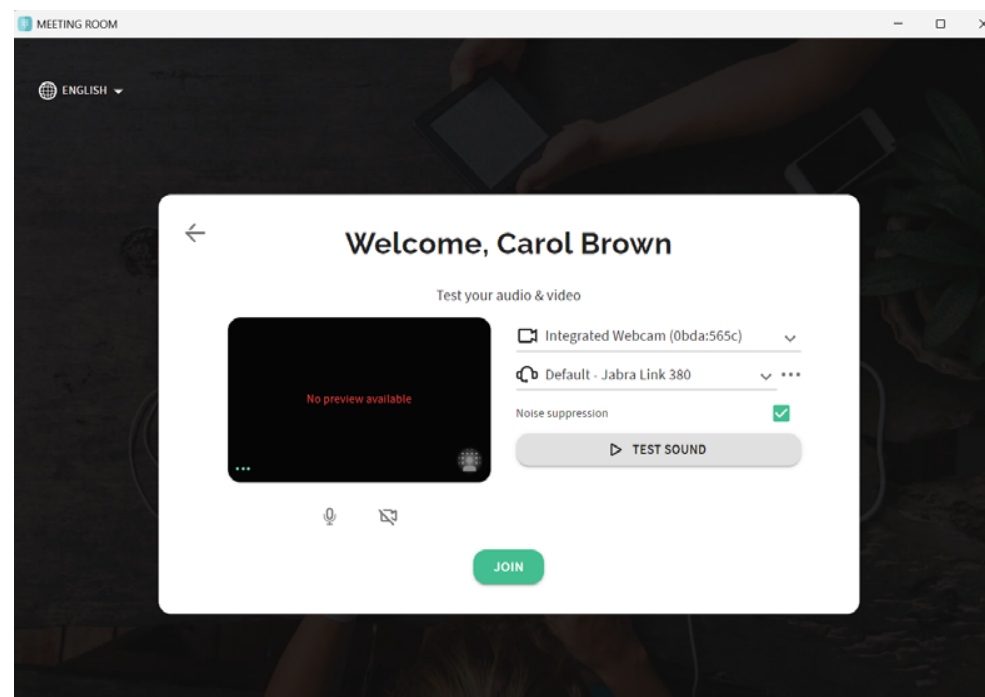
You will find all Meeting Room invitations in the chat. This way you can attend a meeting later. An invitation expires after 15 minutes.

To accept a Meeting Room invitation

You have received a Meeting Room invitation from a colleague.



- 1 Click the chat icon  to open the meeting request in chat and send a message to the host.
- 2 Click on the cross symbol  to ignore the request.
- 3 Click on the grey area to join the meeting.
 - ✓ The meeting waiting room opens.




- 4 Specify your audio and video settings.
 - ✓ The host will receive a request for your participation. Once your participation has been confirmed, you will be taken to the meeting room.



For more information about Meeting Room, see the documentation for Meeting Room.

7 SOFTWARE UPDATE

When a new version of Contact Desktop is available, you will be notified on the login page. From there you can view the notes on the change log and start the update installer with one click.

If you are already logged into the app, you will see a notification with a red dot on the tray icon  and an update notice in the dropdown list.

Contact Desktop supports automatic updates without requiring a manual logout. The client downloads and installs the new version in the background.

During the update process, you will be logged out and automatically logged in again once the installation is complete. No manual password entry or re-authentication is required. This ensures a seamless update process with minimal disruption to your ongoing work.

7.1 WHAT'S NEW

Contact Desktop offers additional features, more flexibility and ease of use with each new version.

[Version 1.39](#)

[Version 1.38](#)

[Version 1.37](#)

[Version 1.36](#)

[Version 1.35](#)

[Version 1.34](#)

7.1.1 VERSION 1.39

This new version of Contact Desktop contains the following improvements:

[Login & Logout queue improvements](#)

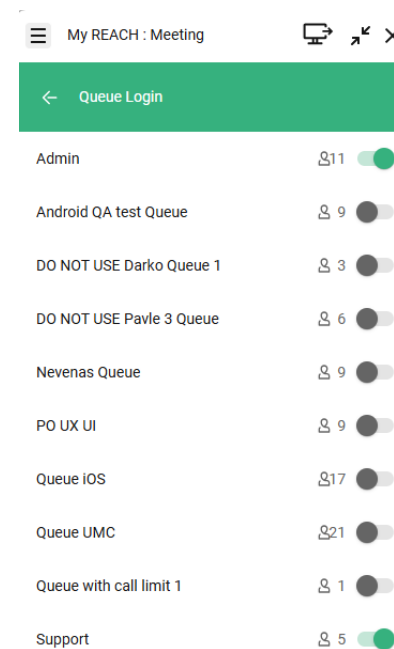
[Click2dial Support for MacOS](#)

[URL-based Call Control](#)

[Missed Queue Call Improvement](#)

Login & Logout queue improvements

To provide clearer guidance on when to log in to or log out of a queue, the number of agents currently logged in is now displayed in the Queue login section. This helps users make better-informed decisions and prevents queues from being left unattended. For more information, see [3.6 Queues & Tools](#), page 26.



Queue Name	Agents	Status
Admin	11	Active (Green)
Android QA test Queue	9	Inactive (Grey)
DO NOT USE Darko Queue 1	3	Inactive (Grey)
DO NOT USE Pavle 3 Queue	6	Inactive (Grey)
Nevenas Queue	9	Inactive (Grey)
PO UX UI	9	Inactive (Grey)
Queue IOS	17	Inactive (Grey)
Queue UMC	21	Inactive (Grey)
Queue with call limit 1	1	Inactive (Grey)
Support	5	Active (Green)

Click2dial Support for MacOS

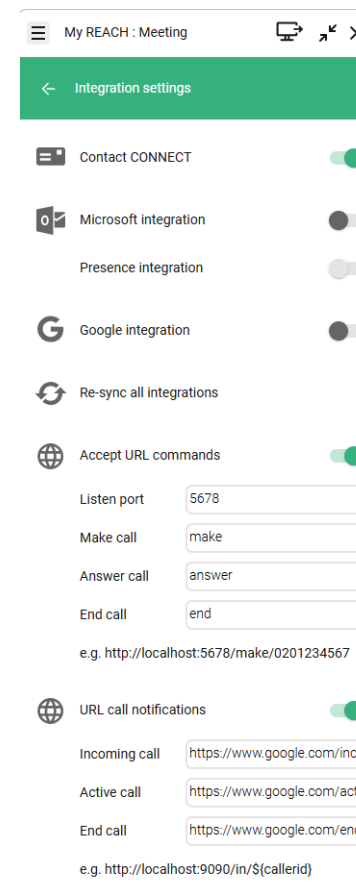
From this release onwards, Click2dial is also supported on MacOS.

Callto: and tel: URLs are now fully supported on MacOS. When clicking on a telephone number on a website or in another application, Contact Desktop will automatically set up a call to the selected number. This ensures a seamless calling experience across platforms.

URL-based Call Control

This release introduces URL-based interaction for seamless integration with third-party systems such as CRM and enterprise applications.

Contact Desktop now supports remote call control via command URLs and can send webhook notifications to external services for call event handling. Additionally, on macOS, URL commands can be triggered locally using AppleScript, allowing users to start, answer, or end calls directly from scripts. For more information, see [3.8.5.4 URL-Based Call Control Integration](#), page 35.



Missed Queue Call Improvement

In cases where a queue call is not offered during the first ringing event but during a subsequent one, the call will now be correctly displayed as a missed call if it was not answered. It will no longer incorrectly appear as an answered call.

7.1.2 VERSION 1.38

This version of Contact Desktop is updated with the following features and improvements:

[Update of Personal Assistant Shomi](#)

[New Client Features](#)

[Further improvements](#)

Update of Personal Assistant Shomi

- New option to automatically upload summaries into connected CRM
- URLs are opened in a browser

New Client Features

- Release Notes available in the logged-in Client

Further improvements

- Panels resizable
- Headset Plantronics D100-M support
- Headset Plantronics D400-M support
- Headset Plantronics APU76 support
- Support of large phone books
- Faster interaction on Headset button press when used in a remote mode

7.1.3 VERSION 1.37

This version of Contact Desktop is updated with the following features and improvements:

[Password reset](#)

[Seamless Client Updates](#)

[Shomi improvements](#)

[Further improvements](#)

Password reset

You can now reset your password directly from the login screen. Use the **Forgot Password** option to securely create a new password and

regain access to your account. For more information, see [2.3 Password reset](#), page 6.

Seamless Client Updates

Contact Desktop now supports automatic updates without requiring a manual logout. Updates are downloaded and installed and you are automatically logged back in without re-entering your password.

Shomi improvements

Work directly with Shomi call summaries:

- Edit the transcript and save changes.
- Share via CRM (with Contact Connect add-on) or by email.
- Copy the summary or transcript to your clipboard for use in other applications.

For more information, see [Call summary actions](#), page 50.

Shomi can now be customized in the settings menu. Options include:

- Display Shomi always on top of the contact list.
- Automatically send call summaries via email.

For more information, see [3.8.7 Shomi settings](#), page 37.

Shomi introduces an improved interaction flow powered by Large Language Models (LLM). This enhancement offers:

- Improved interaction process in Shomi
- More natural and context-aware responses
- Smoother handling of user input and suggestions

Further improvements

- Qboard position is now remembered.
- Microsoft Teams presence synchronization has been extended to support additional status mappings, see [Microsoft Teams Presence Synchronization](#), page 32.
- DTMF tones are available in call control via the dialpad.

7.1.4 VERSION 1.36

This version of Contact Desktop is updated with the following features and improvements:

Contact AI assistant Shomi

Further improvements

Contact AI assistant Shomi

With Shomi - your personal assistant you will get the following options:

- Call Shomi from colleague list
- Get Shomi notifications
- Call screening of incoming calls
- Call recording
- Get extended call summary and analysis
- Ask for action points of the call
- Translate the chat content
- Send the call summary via email
- Ask any question about the call

For more information on how to use Shomi, please see *5 Shomi - Your Personal Assistant*, page 46.

Further improvements

Headset Yealink WH64 support

Contact Connect with more CRM fields and CRM action buttons

7.1.5 VERSION 1.35

This new version of Contact Desktop is updated with the following improvements:

Support for HTTP/HTTPS proxy

Caller ID override for outgoing calls

New presence state for Manager


MacOS support for Apple (ARM) processors

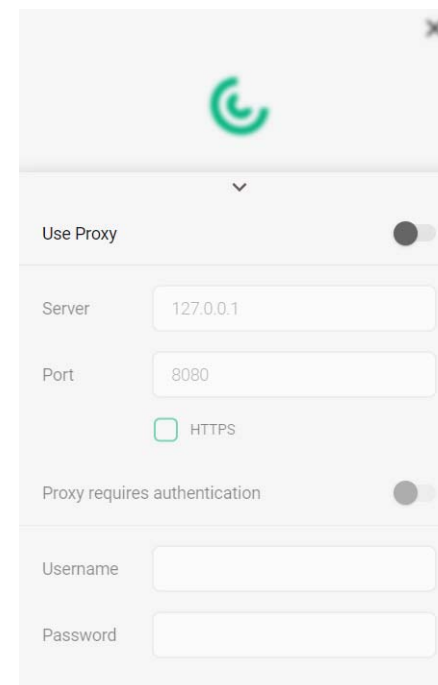
Further improvements

Support for HTTP/HTTPS proxy

From now on Contact Desktop is also supported in http/https proxy environments.

To set up Contact Desktop in http/https proxy environments

- 1 Click on  in the Contact Desktop login dialogue.
 - ✓ The following window appears:



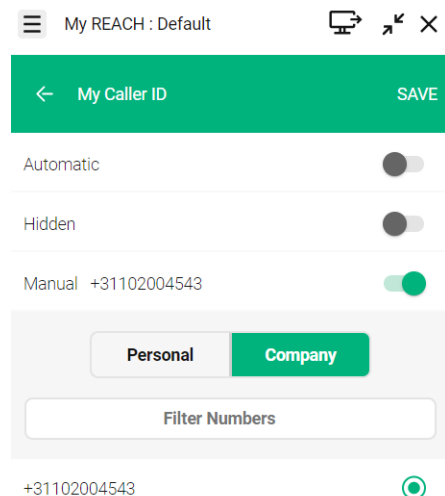
- 2 Activate **Use Proxy**.
- 3 Enter the server and the port and, if necessary, activate HTTPS for the HTTPS proxy.
- 4 If the respective proxy requires authentication, activate the lower switch and enter your user name and password.

Caller ID override for outgoing calls

You have the option of defining your caller ID, which is used for all outgoing calls.

To set your caller ID for outgoing calls

- 1 Select **My Caller ID** in the menu.
 - ✓ The following window appears:



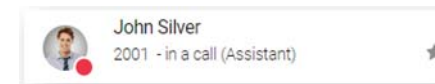
- 2 Select one of the following options:
 - **Automatic:** uses your REACH configuration to determine the caller ID used for all outgoing calls
 - **Hidden:** hides your caller ID so that you are shown anonymously for all outgoing calls
 - **Manual:** a number you choose, either your personal or company number, is used as the caller ID for all outgoing calls

New presence state for Manager

There is a new presence status for managers in the event that an assistant is handling a call on behalf of the manager. Previously, the manager was also shown as busy/in a call for active assistant calls. The assistant

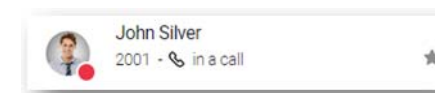
could therefore not see when the manager was available to forward an assistant call to the manager, for example.

This has been improved by introducing the presence of busy/in a call (assistant).



The assistant establishes that the manager (John Silver) is actually available as he is handling a call on behalf of the manager. This allows him to forward a call to the manager if necessary.

If the manager (John Silver) is on a call himself, the assistant observes that he is busy.



In this scenario, the assistant will not forward a call to the manager as the manager is already in a call.

MacOS support for Apple (ARM) processors

Beginning with the M1 processor, Apple has started to implement ARM architecture in their MacBooks. For MacOS end users with ARM architecture based laptops or desktops, we introduce and recommend to install the Contact Desktop macOS ARM build.

Further improvements

- Copy voicemail transcription to your clipboard - this nice feature is expanded with copy the transcription to your clipboard. Simply select **Copy** on the respective voicemail transcription.
- Redialing the last number dialed - an existing function is redialing

the last number dialed by clicking on



in the dialer. This feature has been improved by even remembering the last dialed number after you logged out and logged in again.

- Redirect incoming to voicemail intermittent not working – in rare cases redirect incoming call to voicemail does not work, this has been fixed.
- Edit button missing intermittent on group chats – in rare cases the **Edit** button was missing on (mainly old) group chats, this has been fixed.

- Presence override improved: In case you set a presence override (such as Busy or Away) this is now stored server side. This ensures consistent presence state across all devices.
- Manager/Assistant improvements: Intermittently a redundant call control window for call pickup was presented. This has been addressed.

7.1.6 VERSION 1.34

This version of Contact Desktop contains the following improvements:

MSI in machine context

Further improvements

MSI in machine context

The installation process for the Contact Desktop MSI was improved. The benefits are:

- Single installation on terminal server for all users
- User data is still saved in user context for each user

For existing installations of previous MSI version, please deinstall previous MSI and install this new MSI. You can find the new MSI via desktop.coligo.com.

Further improvements

- Special characters allowed and resolved when entering number during transfer: special characters such as brackets are allowed, recognized and resolved when entered during transfer flow.
- Client framework updated: The client framework of Contact Desktop has been updated (Electron 30) to be up to par with contemporary standards.
- Answer button missing for group calls within remote Contact Desktop setup: When using Contact Desktop in remote setup (eg terminal server) the answer button was not available on the remote instance of Contact Desktop. This has been fixed.

8 REQUIREMENTS

To use Contact Desktop, you must meet the following network requirements. Make sure your IT administrator is aware of these requirements. If the requirements are not met, Contact Desktop will not function or will function only partially.

Operating Systems

Starting from Contact Desktop version 1.34, at least Windows 10 (64-bit only) or macOS 10.15 (Catalina) is required.

Network Requirements



The websocket and signaling endpoint iam.voipoperator.eu will no longer be supported. Please upgrade to aim.voipoperator.eu if you upgrade to Contact Desktop version 1.26.3 or later.

Description	IP address domain	Protocol	Port
TURN/STUN	stun.voipoperator.tel	TCP, UDP	443, 3478
STUN Google One	stun.l.google.com	UDP	19302
Automatic update processes	desktop.coligo.com	TCP	443
WebSocket API connections	Update to: aim.voipoperator.eu	TCP	443
Reach API	reachapi.ispworks.nl	TCP	443
Media	89.184.190.0/24	UDP	16384 - 32768
Signalling	Update to: aim.voipoperator.eu	TCP	443, 4006
File transfer	iamfile.voipoperator.eu	TCP	4006

Description	IP address domain	Protocol	Port
Contact Connect Login and Recognition Service (only required when using the Contact Connect Addon)	Update to: 51.144.182.8	TCP	443
Contact Connect Download Service (only required when using the Contact Connect Addon)	52.239.140.202 52.239.142.100 13.80.19.225	TCP	443
Contact Connect Remote Log Service (only required when using the Contact Connect Addon)	137.117.182.212	TCP	1339
Microsoft integration	login.microsoftonline.com graph.microsoft.com	TCP	443
Google integration	accounts.google.com content-people.googleapis.com	TCP	443
Queues	api.q.infinity.k8s.ispworks.nl	TCP	443
Call recordings	ecp.ispworks.nl	TCP	443