

# Contact App for Microsoft Teams

User manual

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# New Functions

This section provides an overview of the new features presented by Contact App for Microsoft Teams.

Function	Explanation
<b>Shomi</b>	AI assistant for communication and productivity within the application
<b>Call analysis</b>	Provides contextual summaries and supports post-call follow-ups
<b>Call recordings</b>	Records conversations and creates transcripts for later follow-up
<b>Call summaries</b>	Generates summaries of calls for a quick overview.
<b>Chat with Shomi</b>	Interactive chat feature with Shomi for further processing of call content
<b>Home screen with...</b>	<p>Redesigned home screen with improved widgets and faster access to key features.</p> <ul style="list-style-type: none"> <li>● Presence and identity widgets Displays real-time availability and identity of contacts.</li> <li>● Reachability widgets Shows your current REACH status</li> <li>● Agent widget Central control and overview for agent-related functions.</li> <li>● Summaries widget Quick access to generated summaries</li> <li>● Missed call widget Overview of missed calls with direct callback option</li> <li>● Favorite contacts widget Quick access to frequently used contacts</li> </ul>

Function	Explanation
<b>More improvements...</b>	<p>Additional enhancements and improvements to the user experience.</p> <ul style="list-style-type: none"> <li>● Voicemail transcriptions Automatic transcription of voicemails into text</li> <li>● Call control and CRM UI Improved call control and optimized CRM user interface</li> <li>● Themes Customizable themes for individual user preferences</li> <li>● Layout reworked Redesigned layout for better clarity and usability</li> </ul>

# 1 Introduction

The Contact App for Microsoft Teams gives you access to the same features as the Contact Desktop Client, including your contacts, viewing your colleague's presence, editing your own presence, reachability management and the AI assistant Shomi. Calls can be initiated and answered via the Contact Desktop Client, Contact Mobile apps or desk phones.



You need an Contact subscription and the respective add-on to use the Contact App for Microsoft Teams.

The following features are available:

- Full access to your contacts
- Viewing your colleague's presence
- Editing your own presence
- Managing your reachability by setting call forwardings or REACH status override
- AI assistant Shomi
- Logging in to or logging out from queues
- Voicemail transcription
- Single Sign On with your Microsoft 365 account



To use the single sign-on function, the administrator must grant permission in the Microsoft Enterprise Portal.

## Further Online Help

Online Help	URL
<b>Contact Desktop</b>	<a href="https://help.summa.io/desktop/1.00/web/Neutral/en-US/#page/help/Title_Copy.html">https://help.summa.io/desktop/1.00/web/Neutral/en-US/#page/help/Title_Copy.html</a>
<b>Contact Mobile Android</b>	<a href="https://help.summa.io/umc/1.00/Android/Neutral/en-US/#page/help/Title_Copy.html">https://help.summa.io/umc/1.00/Android/Neutral/en-US/#page/help/Title_Copy.html</a>

Online Help	URL
<b>Contact Mobile iOS</b>	<a href="https://help.summa.io/umc/1.00/iOS/Neutral/en-US/#page/help/Title_Copy.html">https://help.summa.io/umc/1.00/iOS/Neutral/en-US/#page/help/Title_Copy.html</a>

## 2 Installation

The Contact App for Microsoft Teams can be downloaded directly in the Microsoft Teams app store.



In order to use the Contact App for Microsoft Teams you need to have the Contact Desktop client installed on your computer.



The Microsoft Teams web app is not supported for the Contact App for Microsoft Teams. You need to use the Microsoft Teams desktop app.



The email address, you use to sign in to Microsoft365 must be the same as your Operator web user. If you have any questions, please contact your administrator.

### To install the Contact App for Microsoft Teams from the app store

- 1 Open Microsoft Teams.
- 2 Click on **Apps**.
- 3 Search for **Contact** and click on **Add** next to the Contact icon.
  - ✓ The Contact App for Microsoft Teams is added to your Microsoft Teams interface.



To open the Contact App for Microsoft Teams you might have to click on ●●● in the menu bar. You can avoid this by right clicking on the app and clicking on **Pin**.

## 2.1 Uploading the Contact App for Microsoft Teams

As an administrator, you can upload the Contact App for Microsoft Teams in the company's internal area of the Microsoft Teams App Store to provide it to all employees in your company. For more information, see also <https://learn.microsoft.com/en-us/microsoftteams/platform/concepts/deploy-and-publish/apps-upload>.

### To upload the app in the Microsoft Teams Admin Center

- 1 Download the Contact App for Microsoft Teams.zip file.  
<https://desktop.summa.io/> under **Additional downloads**.



.zip files may be blocked by Windows after downloading. Right-click on the file and activate **Allow** under **Properties** to disable blocking of the file.

- 2 Open the Microsoft Teams Admin Center.
- 3 In the menu, click **Teams apps**.
  - ✓ A dropdown menu opens.
- 4 Click on **Manage apps**.
  - ✓ The **Manage apps** page appears.
- 5 Click on **+Upload**.
  - ✓ The **Upload a custom app** window appears.
- 6 Click on **Select a file**.
- 7 Select the Contact App for Microsoft Teams .zip file and click on **Open**.
  - ✓ The Contact App for Microsoft Teams has been uploaded to the company-wide App Store and is available to your employees.



The status of the app must be set to **Allowed**. To do so, enter Contact in the search field and check that the status is set to **Approved**.

## 2.2 Automatic distribution of the Contact App for Microsoft Teams

When distributing the Contact App for Microsoft Teams you have two options:

*Company-wide distribution*

*Distribution to groups*

For more information, see also <https://learn.microsoft.com/en-us/microsoftteams/platform/concepts/deploy-and-publish/apps-upload>.

### 2.2.1 Company-wide distribution

You can provide the Contact App for Microsoft Teams to the entire company.

#### To deploy the Contact App for Microsoft Teams across your entire organisation

- 1 Open the Microsoft Teams Admin Center.
- 2 In the menu, click **Teams apps**.
  - ✓ A dropdown menu opens.
- 3 Click on **Setup policies**.
  - ✓ The **App setup policies** page appears.
- 4 Click on **Global (Org-wide default)**.
  - ✓ The **Global** page appears.
- 5 Click on **Add apps**.
  - ✓ The **Add installed apps** window appears.
- 6 Enter Contact in the search field and click on the app that appears.
- 7 Click on **Add**.
  - ✓ The Contact App for Microsoft Teams appears in the list **Installed Apps**.
- 8 Click on **Save**.
  - ✓ The Contact App for Microsoft Teams is available to the entire company.

#### To add a pinned app for the entire company

- 1 Follow steps **(1)-(4)** under *To deploy the Contact App for Microsoft Teams across your entire organisation*, page 4.
- 2 Click on **Add Apps** under **Pinned apps**.
  - ✓ The **Add pinned apps** window appears.
- 3 Enter Contact in the search field and click on the app that appears.
- 4 Click on **Add**.
  - ✓ The Contact App for Microsoft Teams appears in the list **Pinned Apps**.
- 5 Click on **Save**.
  - ✓ The Contact App for Microsoft Teams is provided to the entire company as a pinned app.

### 2.2.2 Distribution to groups

You can provide the Contact App for Microsoft Teams to individual groups.

#### To provide the Contact App for Microsoft Teams to specific groups

- 1 Follow steps **(1)-(3)** under *To deploy the Contact App for Microsoft Teams across your entire organisation*, page 4.
- 2 Click on **Add**.
  - ✓ You can create a new setup policy.
- 3 Enter a name for the setup policy under **Description**.
- 4 Click on **Add apps**.
  - ✓ The **Add installed apps** window appears.
- 5 Enter Contact in the search field and click on the app that appears.
- 6 Click on **Add**.
  - ✓ The Contact App for Microsoft Teams appears in the list **Installed Apps**.
- 7 Click on **Save**.
  - ✓ The Contact App for Microsoft Teams is available to the respective group.

## 2.3 Deleting the Contact App for Microsoft Teams

You can delete the Contact App for Microsoft Teams in your company.

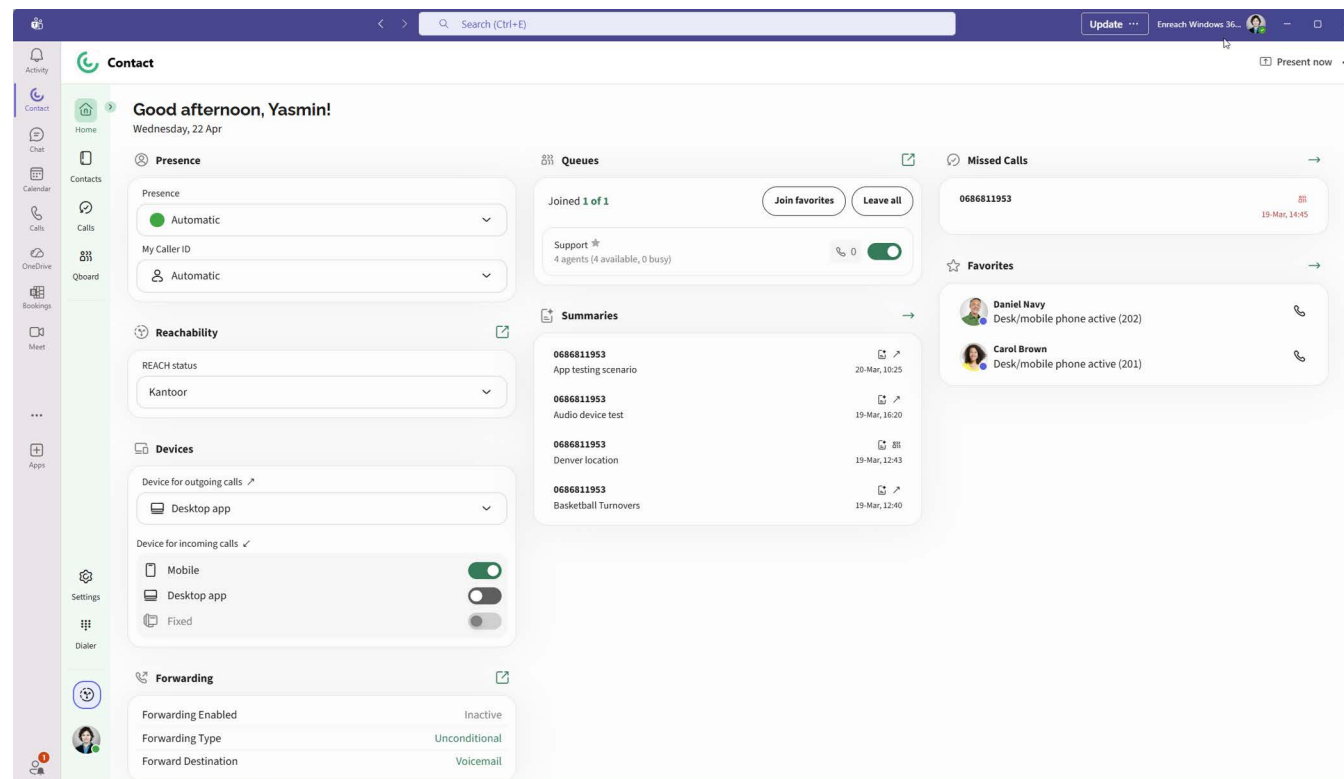
### To delete the Contact App for Microsoft Teams

- 1 Open the Microsoft Teams Admin Center.
- 2 In the menu, click [Teams apps](#).
  - ✓ A dropdown menu opens.
- 3 Click on [Manage apps](#).
  - ✓ The list of all apps available in your company appears.
- 4 Enter Contact in the search field and click on the app that appears.
  - ✓ Information about the app appears.
- 5 Click on [Delete](#) to delete the Contact App for Microsoft Teams.
  - ✓ The app is deleted from the company's internal app store and is no longer available to your employees.


## 3 User Interface

The user interface of the Contact App for Microsoft Teams is designed to be clear and intuitive, giving you quick access to all essential communication features directly within Microsoft Teams.

- Overall overview on the **Home** screen. Here you can find all information, such as presence, call forwarding, missed calls, active call queues, REACH status, favorites as well as summaries generated by *Shomi - Your Personal Assistant*
- Manage your **Contacts** - search and view contact details
- View recent **Calls** - see your call history and quickly redial or return missed calls
- Use **Qboard** - monitor and manage queue activity (if included in your subscription)
- Adjust **Settings** - customize how calls are handled, integrate external services, manage your availability, and configure audio devices to suit your needs
- Access your **Profile** – adjust your presence status, choose devices for incoming and outgoing calls, set your REACH status (override), and change the interface language




## 3.1 Home

With the new Home Screen under , you have access to a central and clearly structured start page. Relevant information and frequently used functions are placed exactly where needed, making them visible at all times and quickly accessible with a single click.

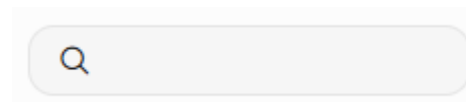
- **Presence**  
You can change your presence directly on the Home screen.
- **Reachability**  
Your current REACH status is displayed here. It depends on the configuration made in the REACH app or in operator. See also *REACH status override*, page 14.  
You can overwrite your current status with a manually set status.
- **Devices**  
Under **Devices**, you can define which devices should ring for incoming calls and which devices you prefer to use for outgoing calls
- **Forwarding**  
You can set conditional or unconditional call forwarding to your voicemail or a phone number.
- **Queues**  
In the **Queues** section, you can see your favorite queues as well all queues you are logged in directly on the home screen. With a single click, you can join all your favorite queues or log out of all queues -both your favorites and those you are currently logged into. Even without a Qboard license, users will still receive a widget to log in and log out. Full statistics, especially real-time statistics, are only available with a Qboard license. See also *6.6 Queues*, page 21.
- **Summaries**  
In the **Summaries** section, you can find all summaries generated by *Shomi - Your Personal Assistant*.
- **Missed Calls**  
Here you can see all missed calls and call back immediately.
- **Favourites**  
Here you can see all your favourite contacts and can directly call them from.

## 3.2 Contacts



Click on  to open your contact list. Here all your contacts with their current presence are displayed. You can view and set favourites. You can also start calls from the contact list, see **4 Contact App for Microsoft Teams options**, page 10.

### Search bar

In the search bar you can search for names and extension numbers.



### Filtering

Click on  to display multiple options when filtering contacts. If a filter is active, the icon changes to .

Option	Explanation
<b>Favourites</b>	You can display all contacts that you marked as favourite.
<b>Available</b>	Shows all contacts that are available.
<b>Colleagues</b>	Shows your colleagues.
<b>Company</b>	Shows all contacts that are within your company.
<b>Personal</b>	Shows your personal contacts.
<b>Microsoft</b>	Shows all your Microsoft contacts.

## Presence

The status of your contacts is indicated by a coloured dot on the profile picture. The following presence statuses are available:



When you are in a Contact Mobile or Microsoft Teams call, your presence is synchronized between both Microsoft Teams and Contact Mobile.

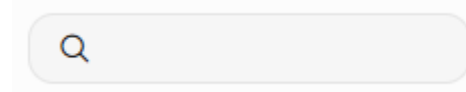
Status	Symbol	Explanation
Automatic		<b>Available</b> This status signals to your contacts that you are logged on to a desk phone or that an Contact Mobile SIM card is linked to your user and you can therefore be reached on a mobile phone. You are not logged in to the Contact Desktop or mobile app.
		<b>Online</b> This status indicates that you are logged in to Contact Desktop and Contact Mobile.
		<b>Offline</b> This status indicates that you are not logged in to any device or client.
Away		This status indicates that you are currently unavailable.
Busy		This status indicates that you are currently busy, for example on a call or in a meeting.
Offline		With this option, your status is signalled as logged out on all devices and on Contact Mobile and Desktop.

## 3.3 Calls

Click on to open the Recents list. All your incoming, outgoing and missed calls are displayed here. You can also start calls from the recents list, see **4 Contact App for Microsoft Teams options**, page 10.

### Search bar

In the search bar you can search for names, extension numbers, queues and groups.




### Filtering

Click on to display multiple options when filtering calls. If a filter is active, the icon changes to .

Option	Explanation
<b>Queue</b>	Activating this filter shows all your incoming, outgoing and missed queue calls.
<b>Group</b>	This filter shows all your incoming, outgoing and missed group calls.
<b>Outgoing</b>	This filter shows all outgoing calls you have made.
<b>Incoming</b>	This filter shows all incoming calls you have received.
<b>Missed</b>	This filter shows all calls you did not answer.
<b>Redirected</b>	This filter shows all calls that were redirected to another destination.

Option	Explanation
<b>Voicemail</b>	This filter shows all calls that were forwarded to your voicemail.
<b>Summary</b>	This filter shows all calls that have been analyzed and summarized by Shomi.

## 3.4 Qboard

Click on  to open the Qboard dashboard. The overview of your queues provides a real-time overview of department performance and utilisation, agent availability, and overall statistics.

## 4 Contact App for Microsoft Teams options

You can make phone calls, set your forwardings and manage your queues and REACH settings from the Contact App for Microsoft Teams.



In order to use the Contact App for Microsoft Teams, it is recommended to have the Contact Desktop App open. The client can be downloaded from the following download link: <https://desktop.summa.io/>

### 4.1 Telephoning

You can start calls directly from the Microsoft Teams interface. You have several options for starting a call:

- From your contact list
- From the recents list
- From a contact's profile
- From the dialpad



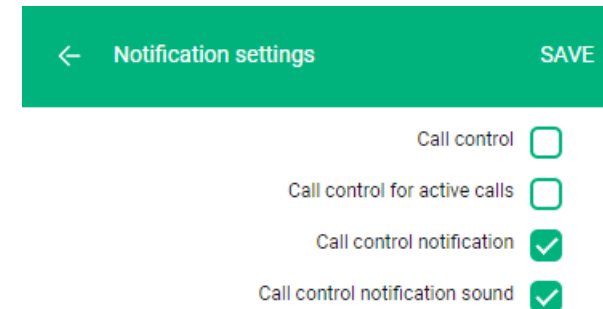
Calls that are started via the Contact App for Microsoft Teams are carried out on the device that you set under *Device for outgoing calls*.



If you want to use the Contact Mobile softphone (e.g. with a headset) in combination with the Contact App for Microsoft Teams, you will still need to install the Contact Desktop Client. This is necessary as Contact is not allowed to use the WebRTC capabilities of Microsoft Teams.

Contact is not allowed to send push notifications to Microsoft Teams, for example, on an incoming call to your softphone.

To ensure that you don't miss an incoming call to your softphone with the Contact App for Microsoft Teams, please use the following notification settings in the Contact Desktop Client (if you are using a fixed or mobile device, you will of course be notified by the ringing event of these devices instead).



#### To start a call from a contact's profile

- 1 Click on **Contacts**.  
✓ Your contact list appears.
- 2 Click on the contact you want to start the call with.
- 3 Click on in the upper right corner.  
✓ The call is initiated and you can make the call on your selected device, see **Device for outgoing calls**, page 13.

#### To start a call from the dialpad

- 1 Click on **Contacts** or **Calls**.
- 2 Click on .  
✓ The dialpad appears.

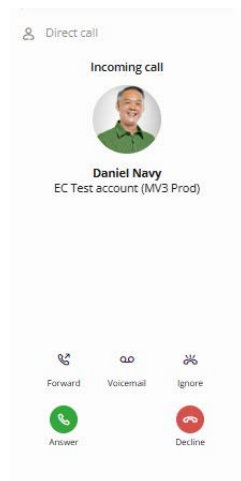
- 3 Type in the extension of the user or the external number you want to call.
  - ✓ The call is initiated.



### 4.1.1 Options during an incoming call

When you receive an incoming call on the device you have selected, see *Device for incoming calls*, page 14, you have several options. You can accept the call, forward it to another destination, such as a colleague or your voicemail, or reject it.

#### To forward an incoming call to another destination


You are receiving an incoming call.



- 1 Click on  and select the destination you want to forward the call to.
  - ✓ The call is forwarded directly.
  - or
  - ✓ Click on  to forward the call directly to your voicemail.

#### To ignore an incoming call

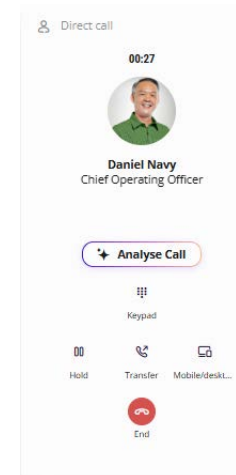
You are receiving an incoming call.

- 1 Click on  .


- ✓ The call control window disappears in the background. The caller hears the dialling tone until the timeout is reached.


### 4.1.2 Options during an active call

Once a call is established, you can open the keypad to enter DTMF digits, transfer the active call to another destination, put the call on hold, and perform a device switch to seamlessly transfer an active call to another device.





#### To transfer an active call to another contact without consultation (Blind transfer)

- 1 During an active call, click  .
- 2 Click on **Blind transfer** to transfer the call without consultation.
  - ✓ A menu for contact selection appears.
- 3 Select a contact from the list. You can also search by typing in the search field.


- 4 Click on  to execute the transfer.
  - ✓ The call is transferred directly to the selected contact.

### To transfer an active call to another contact with consultation (Attended transfer)


- 1 During an active call, click  .
- 2 Click on **Attended transfer** to start a consultation call.
  - ✓ A menu for contact selection appears.
- 3 Select a contact from the list. You can also search by typing in the search field.
  - ✓ The first subscriber is put on hold and you can call and consult with the other subscriber.
- 4 Click on  to execute the transfer.
  - ✓ Both participants are connected.

### To start a conference


You have at least two conversations, one **active** and one **on hold**. This provides you with the option of creating a conference between these subscribers and yourself.

- 1 Click on  .
  - ✓ All subscribers are brought together in a conference.


### To transfer an active call to one of your devices

- 1 During the 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.



### To put a call on hold

- 1 During an active call, click  .
  - ✓ The call will be put on hold and your conversation partner will hear music on hold.
- 2 Click this icon again to re-activate the held call.

## 4.2 Voicemail

You can receive and listen to voicemails. This is indicated by  in the recents list.


### To listen to a voicemail

- 1 Click on  **Calls**.
  - ✓ The **Calls list** appears.
- 2 Click on the entry with the voicemail.
- 3 Click on  .
  - ✓ The voicemail is played and automatically transcribed via Shomi.





You can slow down or speed up voicemail playback by tapping the 1.0x button. Available speeds: 0.5x, 1.0x, and 1.5x

### To download a voicemail

- 1 Click on  **Calls**.
  - ✓ The **Calls list** appears.
- 2 Click on the entry with the voicemail.

- Click on 
  - ✓ The voicemail is downloaded to your device.

### To delete a voicemail

- Click on  **Calls**.
  - ✓ The **Calls list** appears.
- Click on the entry with the voicemail.
- Click on .
- Click on **Yes, delete it**.
  - ✓ The voicemail is deleted.

## 4.3 Profile Options




In your profile menu, you can adjust your availability and select which devices you want to use for incoming and outgoing calls.

The available options include:

- Presence – Set your availability (Automatic, Available, Busy, etc.).
- Devices – Choose which device to use for outgoing and incoming calls (mobile, desktop app, or fixed device).
- REACH status (override) – Manually override your current status.
- Language – Change the interface language.

### Presence

You can overwrite your presence status. You have the following options:




-  Away
-  Busy
-  Offline

### To overwrite your presence status

- Click on your **profile picture** in the bottom left corner.
- Under **Presence** select the status you want to set from the dropdown list.
  - ✓ Your current presence status is overwritten with the selected status.

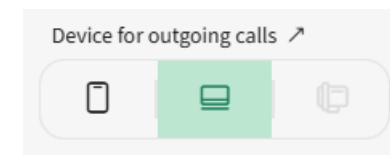
### Device for outgoing calls

You can set on which device your calls should be carried out. You have the following options:

Icon	Explanation
	If you select this option, calls are made via Contact Mobile.
	If you select this option, calls are made via the softphone of the Contact Desktop.
	If you have a deskphone installed and linked with Contact Mobile, you can select this option to make calls via your deskphone.

### To select which device will be used for outgoing calls

- Click on your **profile picture** in the bottom left corner.
- Click on the device which you want to use for your outgoing calls.






Symbol colour	Explanation
Green	This device is selected.
Black	The device is available, but not selected.

Symbol colour	Explanation
Greyed out	The device is not available

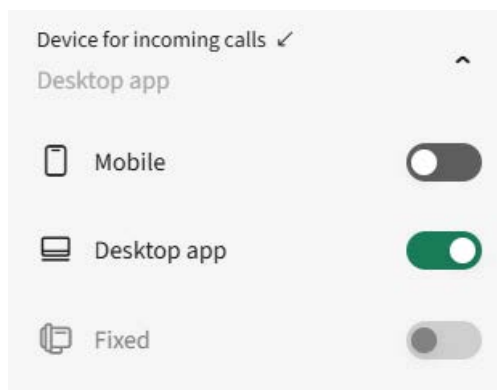
### Device for incoming calls

You can select on which device(s) incoming calls should be signalled.

Icon	Explanation
	Activate this option to have incoming calls signalled on your Contact Mobile application.
	Activate this option if you want incoming calls to be signalled on the Contact Desktop client.
	If you have a deskphone installed and linked with Contact Mobile, you can select this option to have incoming calls signalled on your deskphone.

### To select which device will signal incoming calls

- 1 Click on your [Profile Picture](#).
- 2 Click on the device on which you want to receive calls.



An incoming call can be signalled on several devices.

### REACH status override

You can manually override your current REACH status to control how incoming calls are handled, regardless of your calendar or automatic status settings.

### To manually change your REACH status

- 1 Click on your [Profile Picture](#) in the bottom left corner.
- 2 Open the dropdown menu under [REACH status](#) and select a REACH status.
  - ✓ Your current REACH status is overwritten with the selected status.

### Change language

You can change the language of Contact App for Microsoft Teams.

### To change the language of Contact Mobile

- 1 Click on your [Profile Picture](#).
- 2 Select the desired language in the language field.
  - ✓ The language is changed directly.

# 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](#)

[Interactive Transcription Capabilities](#)

[Language output](#)

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

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

[Chat with Shomi](#)

[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 **5.4.1 Call analysis**, page 16.

### Smart Voicemail Transcription

- Text-based Voicemail: Converts voicemail messages into text format.
- Context Preservation: Ensures critical information is accurately documented and easily accessible.



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 Contact Mobile.

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

The language in which Shomi speaks to the user is the language set under **Settings**, see **6.1 General**, page 20.



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

### 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 Mobile 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 with Shomi

The Shomi Chat currently offers a basic functionality: it allows you to ask targeted questions about the content. It can also translate the summary, send it by email, or transfer it to a CRM system to facilitate further processing.

### To chat with Shomi

- 1 In the Summary dialogue, click on  to open the chat.
  - ✓ The [Personal Assistant](#) opens.
- 2 You can ask questions about the conversation.
  - ✓ Shomi responds.
 In addition to chat with Shomi you can
  - ask for translation
  - ✓ Shomi translates.
  - send the Summary to your CRM system




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 [Calls](#).
  - ✓ The Call History opens.
- 2 Click the trash icon  in the top right corner of the interface to delete the conversation data of the selected entry.
  - ✓ You are asked to confirm, to delete all conversation data (audio and text) from this call.
- 3 Click on [Delete](#).
  - ✓ All conversation data from this call 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 analysis](#)

[Call analysis](#)

[Record a meeting](#)

### 5.4.1 Call analysis

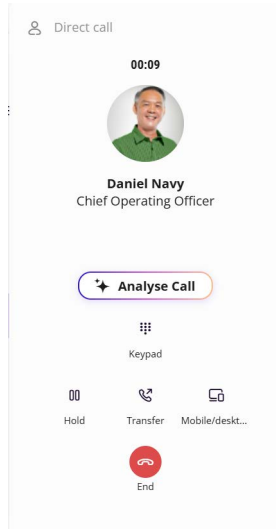
You are in a phone call. You would like to have the information from the call summarized after the call.

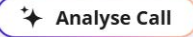


Ensure that you inform the person you are talking to that the call is being recorded and ask for their consent. For more information on data protection, see [5.5 Data Protection & AI Model Usage](#), page 18. Please also comply with the policies of your company and the data privacy laws of your country.

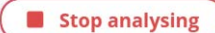
### To let Shomi analyse a call

You are in an active call.



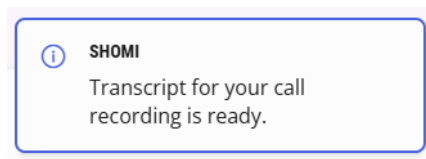
- 1 Click on .
  - ✓ Both parties hear the announcement, that the call recording has started. This may vary depending on the settings and country.


- 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 Go to **Calls**, click on the entry with the  icon.
  - ✓ Shomi shows a call summary.

You have multiple options:

- 4 Click on one of the **suggestions** Shomi offers:

Command	Explanation
<b>Shomi</b>	You can start a chat with Shomi and ask further questions about the call..See also <i>5.2 Chat with Shomi</i> , page 16.
<b>Translate</b>	Shomi translates the call summary. Choose the language you want the call summary translated to.
<b>E-Mail</b>	Shomi will send you the call summary via email.
<b>Push to CRM</b>	Shomi will push the summary to your integrated CRM.



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

## 5.4.2 Record a meeting

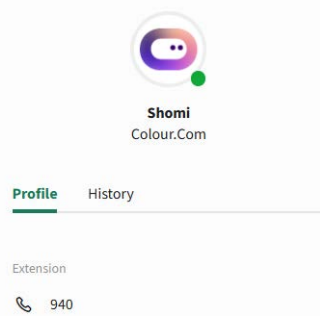
With Shomi it is particularly easy to record meetings, summarize them and send meeting minutes.




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 18. 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 Go to the [Call history](#), and click on the entry with the  icon.
  - ✓ Shomi shows a call summary.

You have multiple options:

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

Command	Explanation
<b>Shomi</b>	You can start a chat with Shomi and ask further questions about the call.
<b>Translate</b>	Shomi translates the call summary. Choose the language you want the call summary translated to.
<b>E-Mail</b>	Shomi will send you the call summary via email.
<b>Push to CRM</b>	Shomi will push the summary to your integrated CRM.

### 5.4.3 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.

#### 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.

## 5.5 Data Protection & AI Model Usage

### 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

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

- Service operated by Google and Microsoft in Europe

## Data Usage & Retention

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- As Shomi leverages paid services from Microsoft and Google, all hosted in Europe, user data is not used for AI model training.
- Transcripts and recordings are stored in 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

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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 Mobile EULA

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

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

## Contact Mobile Data Privacy Statement

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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 Settings

In the Settings menu, you can customize how the application behaves, adjust audio and device preferences, manage integrations, and set your availability to match your daily workflow.

Click on  [Settings](#) to open the menu and adjust your call, audio, and account preferences.

### 6.1 General

These options allow you to personalize the appearance and functionality of the application according to your preferences.

#### App

Choose the theme of the interface by selecting Light, Dark, or System, which automatically follows the operating system's appearance settings.

You can also change the application language using the language dropdown menu.

### 6.2 Forwarding

Set up unconditional or conditional call forwarding to voicemail or another number or extension.

#### To manage your forwarding settings

- 1 Click on [Settings](#) in the menu.
- 2 Click on [Forwarding](#).
- 3 Activate [Enable call forwarding](#).
- 4 Click on [Conditional](#) to set a conditional forwarding.

- 5 Select the time after which calls should be forwarded from the dropdown list.  
or
- 6 Click on [Unconditional](#) to set an unconditional forwarding.
- 7 Select if you want to forward calls to your voicemail or to an phone number/extension.
- 8 If applicable, enter the respective extension or phone number.
- 9 Click on [Save](#).  
✓ Your forwarding settings are saved.

### 6.3 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

- 1 Click on [Settings](#) in the menu.
- 2 Click on [My Caller ID](#).
- 3 Activate the option [Hidden](#).  
✓ Your phone number will no longer be displayed when you are making external calls.

#### To define which of your numbers is to be displayed by default

- 1 Click on [Settings](#) in the menu.
- 2 Click on [My Caller ID](#).
- 3 If you want your default number displayed, activate [Automatic](#).
- 4 If you want a specific number to be displayed, deactivate [Automatic](#) and activate [Manual](#).
- 5 You can filter between [Personal](#) or [Company](#) numbers.
- 6 Select the number you want to display for outgoing external calls or enter it in the search field.  
✓ The selected number will now be displayed when you make external calls.

## 6.4 Integrations

Activate or deactivate Contact Connect.

### Contact Connect

Contact Connect allows you to integrate Contact App for Microsoft Teams 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 App for Microsoft Teams, 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.

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 App for Microsoft Teams, click on or to switch between applications.



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

### To manage your integration settings

- 1 Click on [Settings](#) in the menu.
- 2 Click on [Integrations](#).
- 3 Activate the integration you want to set up.
  - ✓ The Integration with your contact database, your CRM or ERP system is active.

## 6.5 REACH

Override your current status or configure automatic status changes during meetings.

### To manage your REACH settings

- 1 Click on [Settings](#) in the menu.
- 2 Click on [REACH](#).

Label	Explanation
<b>Active status</b>	Here you can see the status that is currently active for your user. Your REACH profile is managed by your administrator.
<b>Override with</b>	You can select a status which overrides your currently active status from the dropdown list.
<b>Expiry time and date</b>	Activate the checkbox and set the expiry time and date for the status override.
<b>While in Meetings</b>	Specify which status should be shown to your contacts while you are in Meetings.

- 3 Click on [Save](#).
  - ✓ Your settings are saved.



You can change your REACH status manually. See [REACH status override](#), page 14.

## 6.6 Queues

Log in or out of the queues you are assigned to, manage your queue preferences, and use favorites to quickly join selected queues or leave all queues at once.

## To log in or out of your queues

- 1 Click on [Settings](#) in the menu.
- 2 Click on [Queues](#).
  - ✓ All queues in which you are a member, are displayed here. You can see how many queues you are currently logged into.
- 3 Activate the [slider](#) next to the queues you want to log into.
  - ✓ You are logged into the respective queues.
 or
- 4 Deactivate the [slider](#) next to the queues you want to log out of.
  - ✓ You are logged out of the respective queues.

## To mark a queue as a favorite

- 1 Click on [Settings](#) in the menu.
- 2 Click on [Queues](#).
  - ✓ All queues in which you are a member, are displayed here. You can see how many queues you are logged into.
- 3 Click the [star icon](#) next to a queue.
  - ✓ The queue is added to your favorite queues and appears on the dashboard for quicker access.

## To join all favorite queues

- 1 Click on [Settings](#) in the menu.
- 2 Click on [Queues](#).
- 3 Click [Join Favorites](#).
  - ✓ You are logged into all queues that are marked as favorites.

## To leave all queues

- 1 Click on [Settings](#) in the menu.
- 2 Click on [Queues](#).
- 3 Click [Leave All](#).
  - ✓ You are logged out of all queues.

## 6.7 Shomi

You can customize different settings and behaviours 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.
Automatically push summaries to CRM	Click the check box to automatically send the summaries generated by Shomi to your CRM.

## 6.8 About

View key details about your app version, browser, and platform, and access log downloads along with links to help resources and legal documents.