

ENREACH CONTACT DESKTOP

USER MANUAL

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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.

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

Further documentation

Product	Link
Enreach Contact	https://help.enreach.com/contact/1.00/web/Enreach/en-US/#page/help/Title_Copy.html
Enreach Contact iOS	https://help.enreach.com/umc/1.00/iOS/Enreach/en-US/
Enreach Contact Android	https://help.enreach.com/umc/1.00/Android/Enreach/en-US/
Enreach Contact Connect	https://help.enreach.com/contactconnect/1.00/web/Enreach/en-US/
Enreach Contact for Web	https://help.enreach.com/contactweb/1.00/web/Enreach/en-US/


2 ENREACH CONTACT DESKTOP

Enreach 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 Enreach Contact Desktop icon will appear in the taskbar.

The application is automatically launched from the Enreach login screen. If the Enreach 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 Enreach Contact Desktop.

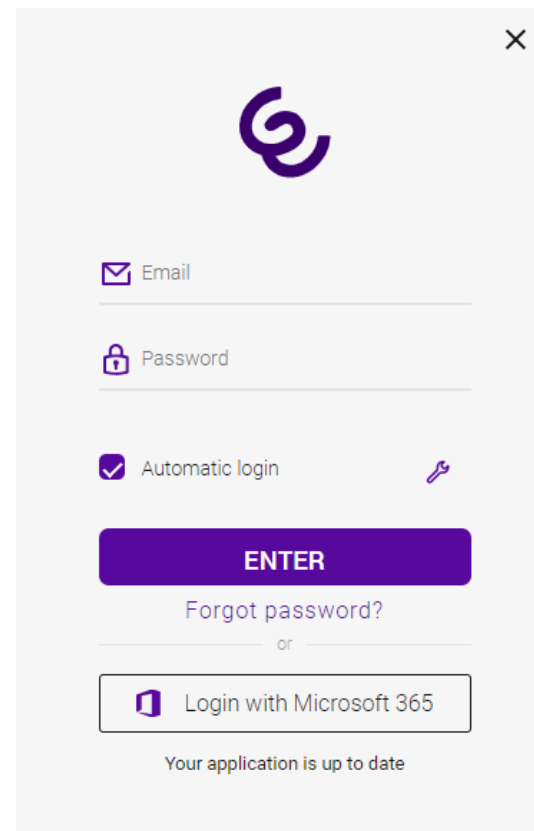
2.1 FEATURES

Enreach Contact Desktop offers the following functions, among others:

- Chat, see [2.5.5 Chat](#), page 16
- Queue management, see [3.6 Queues & Tools](#), page 29
- Call control, see [4 Calling with Enreach Contact Desktop](#), page 40
- AI assistant Shomi, see [5 Shomi - Your Personal Assistant](#), page 48
- Enreach Meetings integration, see [6 Enreach Meetings](#), page 56
- Outlook and Google integration, see [3.8.5 Integration settings](#), page 33

2.2 LOGIN

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

The image shows a login window for Enreach Contact Desktop. At the top right is a close button (X). Below it is the Enreach logo, a stylized 'e' inside a circle. There are two input fields: 'Email' with an envelope icon and 'Password' with a lock icon. Below these is a checkbox for 'Automatic login' with a key icon to its right. A large blue button labeled 'ENTER' is below the inputs. Underneath the button is a link 'Forgot password?'. Below that is a separator line with the word 'or' in the center. At the bottom is a button with the Microsoft 365 logo and the text 'Login with Microsoft 365'. At the very bottom, it says 'Your application is up to date'.

Login with Enreach Contact Credentials

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

To log in with your Enreach Contact credentials

- 1 Start Enreach Contact Desktop by clicking on the Enreach 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 Enreach Contact Desktop.



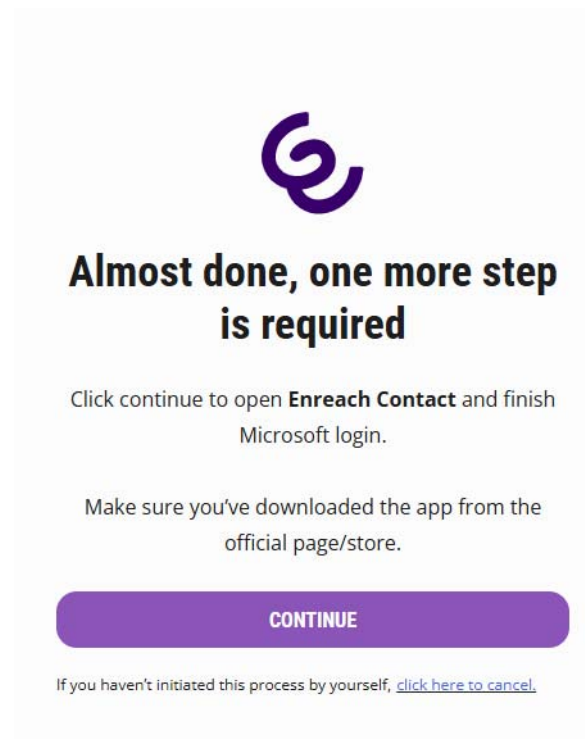
Select the **Automatic Login** checkbox to automatically log in to Enreach Contact Desktop when you start your computer.

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 34.

To log in with your Microsoft 365 Credentials

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



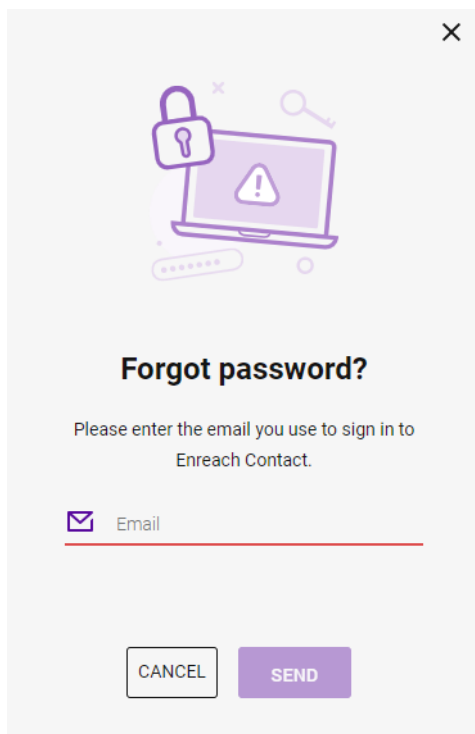
If the message **Your authentication has expired** appears, you need to re-authenticate with your Microsoft account. Microsoft may ask you to sign in more frequently until the application is recognized as a trusted app.

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 Enreach Contact Desktop login dialogue.
✓ The following window appears:



- 2 Enter the email address associated with your Enreach 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 Enreach Contact applications with your new password.

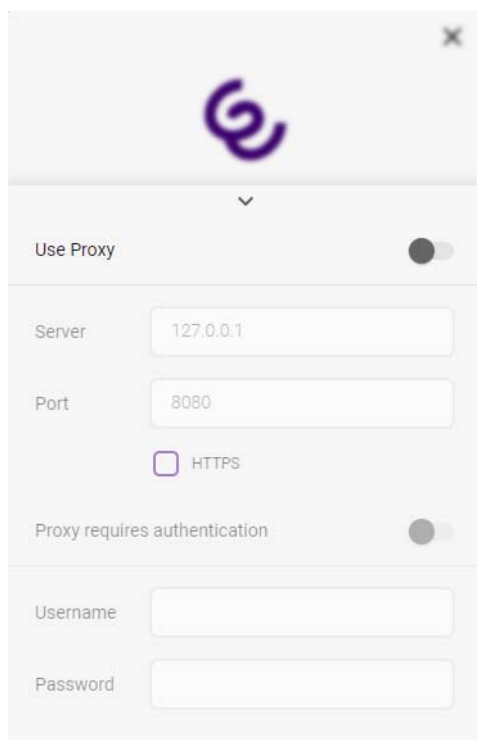
2.4 SUPPORT FOR HTTP/HTTPS PROXY

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

To set up Enreach Contact Desktop in http/https proxy environments

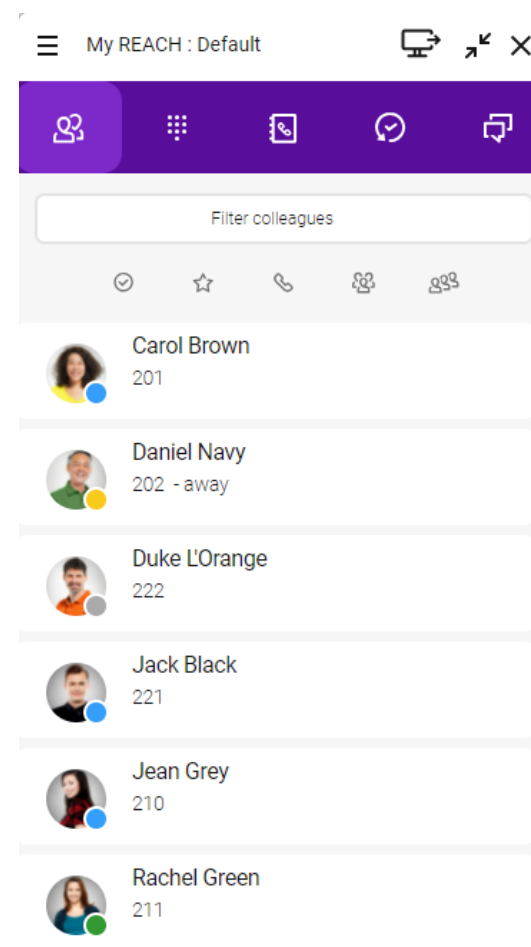
- 1 Click on  in the Enreach Contact Desktop login dialogue.
✓ The following window appears:

2.5 USER INTERFACE



The screenshot shows a configuration window for the Enreach Contact Desktop application. It features a purple logo at the top left. Below the logo is a 'Use Proxy' toggle switch, which is currently turned off. Underneath the toggle are input fields for 'Server' (containing '127.0.0.1') and 'Port' (containing '8080'). There is also a checkbox for 'HTTPS' which is currently unchecked. Below these fields is another 'Proxy requires authentication' toggle switch, which is also turned off. At the bottom of the window are input fields for 'Username' and 'Password'.

- 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.



The Enreach 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

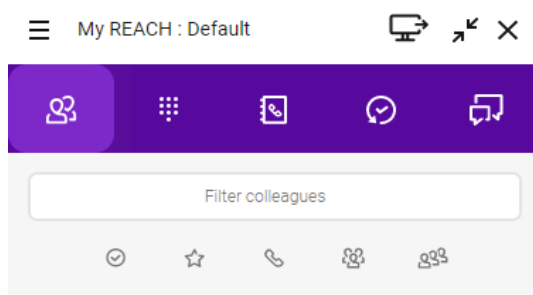
To get an overview of your colleagues and their availability, click on



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.



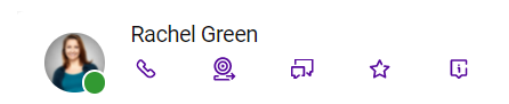
If you disable the option [Show queues](#) in the colleague list settings, the icon to filter queues in the phonebook will not be displayed. See [3.8.6 Colleagues list settings](#), page 37.




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 an Enreach 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 27.

Symbol	State	Explanation
	Available for calls	Contacts that are not logged in to Enreach Contact Desktop but can be reached on a phone or mobile
	Online	Contacts that are logged in to Enreach Contact Desktop
	Away	Contacts who have manually set their presence override to Away .
	Busy	Contacts that are in a call, in a Enreach Meetings session, in an MS Teams call, or have their presence status set to Do Not Disturb
	Offline	Contacts that are not logged in to Enreach 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




To see how your status in Enreach Contact synchronizes with your status in Microsoft Teams, and vice versa, see *Microsoft Teams Presence Synchronization*, page 35.

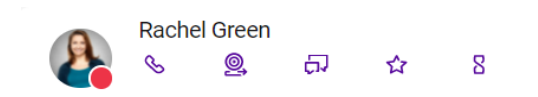
Notification when a contact is available


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

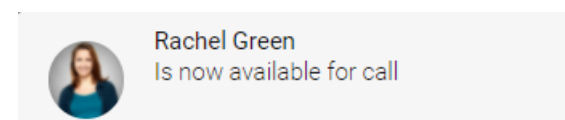
To set a notification about the availability of a contact


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

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



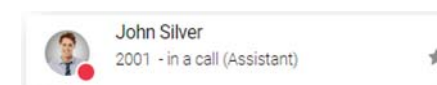
- Click on .
 - You have set the notification about the availability of the contact. The other party ends the call and the status changes to online (green).
 - You will receive a notification about the availability of the contact.



- Click on  to call the contact directly.

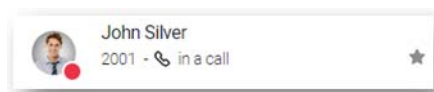
Presence state for Manager

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.

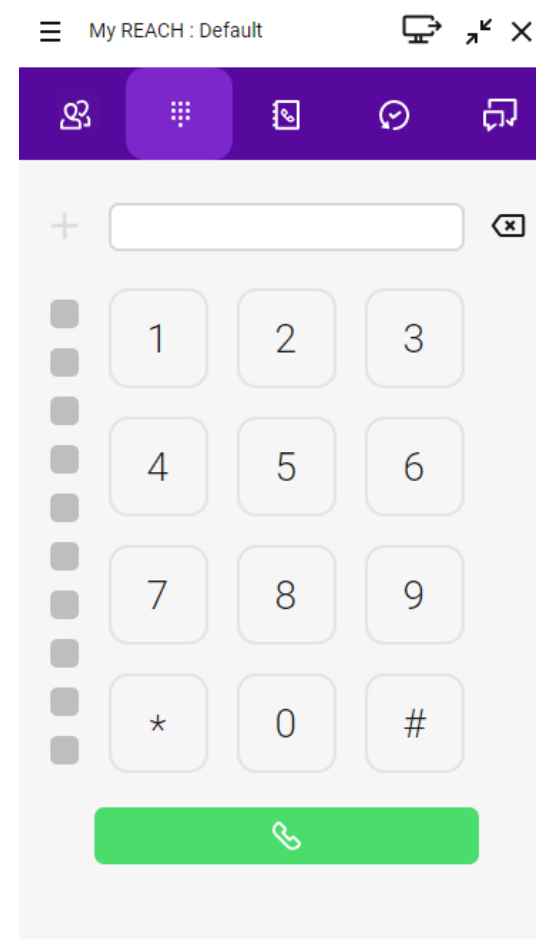


In this scenario, the assistant will not forward a call to the manager as the manager is already in a call.

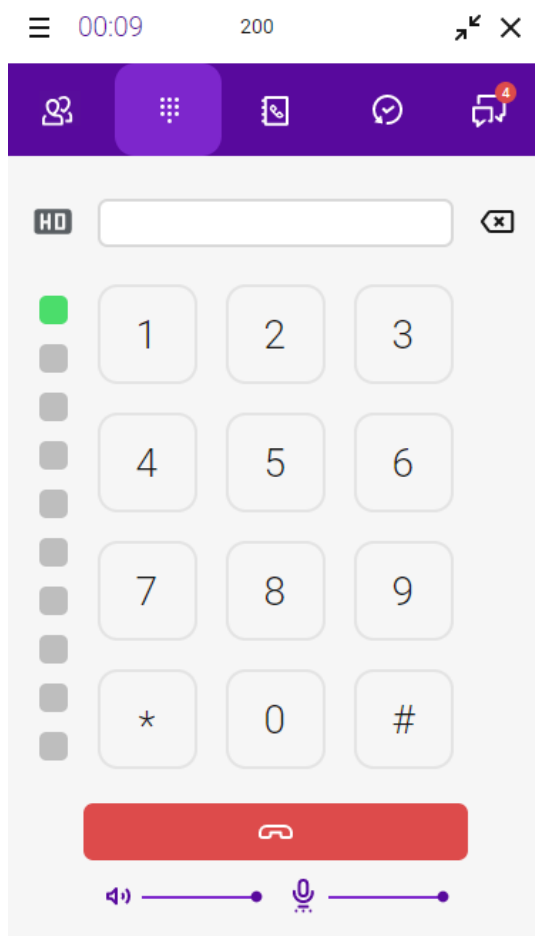
2.5.2 DIALER

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.

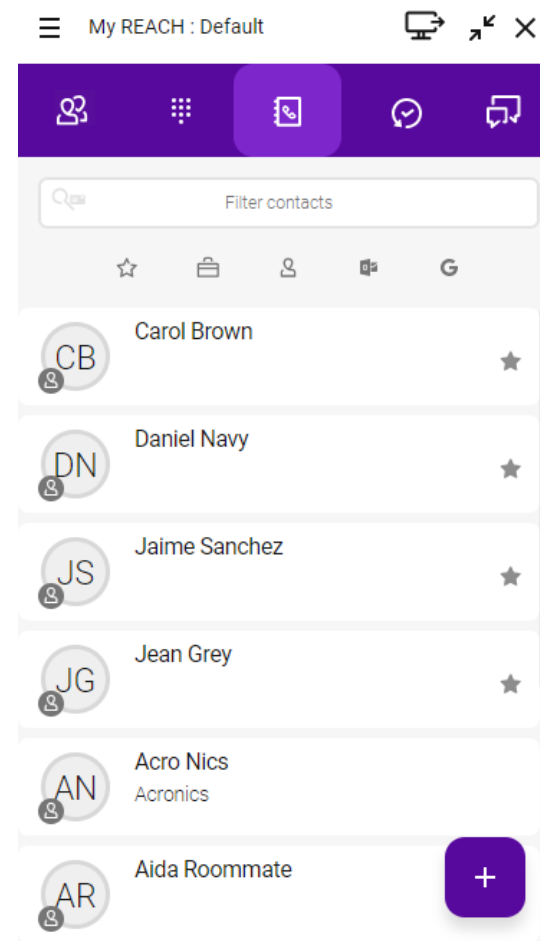


During a call, you can adjust the audio and microphone volume and use the Line keys on the softphone. See also [4.3 Use of two simultaneous softphone calls](#), page 43.



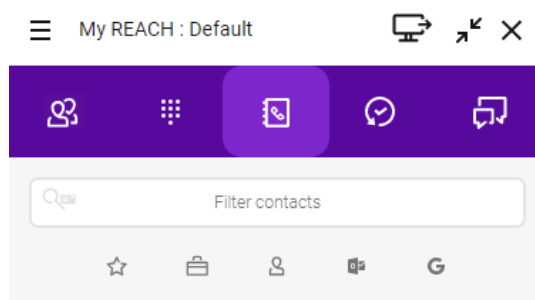
2.5.3 PHONEBOOK

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.

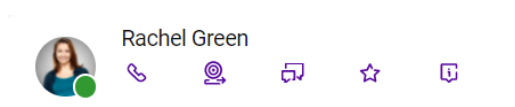
- Activate  to show your Favorites.
- Activate  to show company contacts.
- Activate  to show personal contacts.
- Activate  to show Outlook contacts, if applicable. See 3.8.5.2 *Microsoft integration*, page 34.
- Activate  to show Google contacts, if applicable. See 3.8.5.3 *Google Integration*, page 36.










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

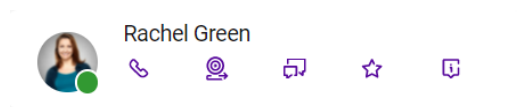
- 1 On the user interface, click on .
 - ✓ The Phonebook opens.
- 2 Click on .
- 3 Enter the desired contact details.
- 4 Click on **Add number**.
- 5 Select the type of number you want to add.
- 6 Click on **OK**.
- 7 Click in the field **Enter number** and enter the phone number of the contact.
- 8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





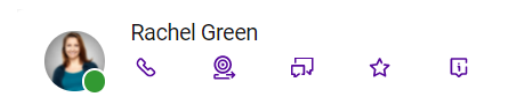
The execution of the action may take some time.



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 Enreach 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 33.

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.

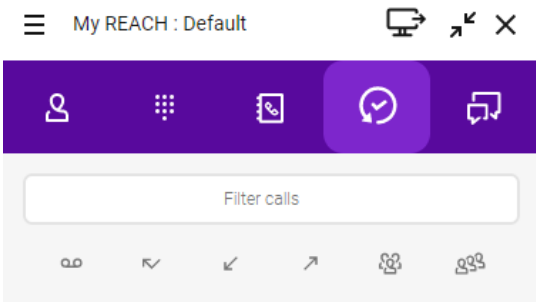
Symbol	Explanation
	Missed call
	Received call
	Outgoing call
	New voicemail
	Voicemail
	Shomi call summary or transcription
	Answered call after forwarding
	Unanswered call after forwarding









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.

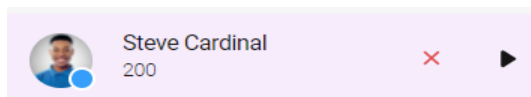
Voicemails



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.

- Filter the entries in the Call History by clicking .
 - ✓ All voicemails are displayed.
- Move the mouse over the entry of the voicemail you want to listen to.




- 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


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

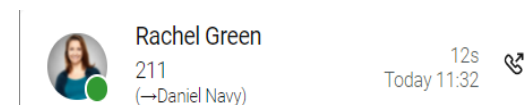



The execution of the action may take some time.

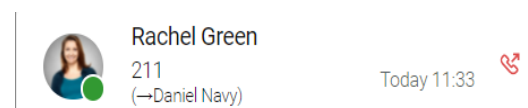
Forwarded calls

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

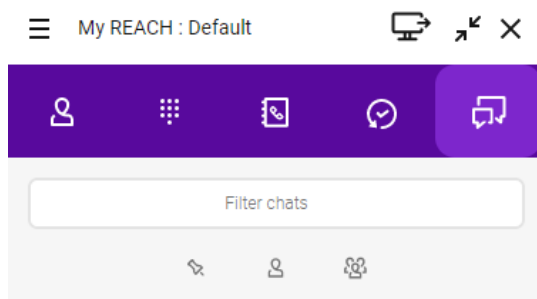
To open the chat, click on . In the chat you can send messages, start calls and send Enreach Meetings invitations. Web pages shared in Enreach Contact Desktop are displayed as links, shared locations are displayed with Google Maps recognition.






All your messages are also available via Enreach 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.

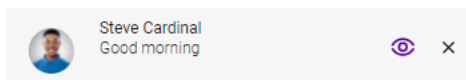
- Activate  to show chats that you have pinned.
- Activate  to show single chats or activate  to show group chats.




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 .

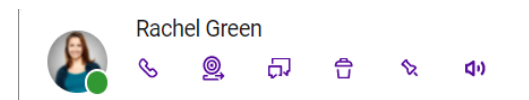
- 2 In the search bar, enter the name of the contact you want to start a chat with.
 - 3 Click on the respective Contact.
✓ The chat window opens.
 - 4 Enter your message in the message box.
 - 5 Click on .
- ✓ Your message is sent to the respective contact.









To start a call from a single chat

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

To expand the options for a Single Chat

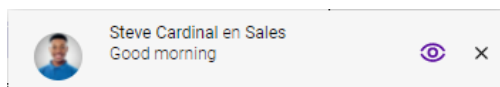
- 1 Move the mouse over a chat.
 - 2 Click on .
- ✓ The options for the chat will open.





- 3 Click an icon to perform an action.
 - Click on  to call the subscriber.
 - Click on  to send an invitation to Enreach Meetings.
 - 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.

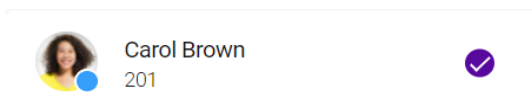
Group Chats

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

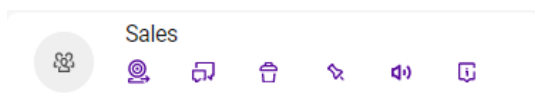
- 1 Click on  and then on .
- 2 Use the filter function and select the contacts you want to start a group chat with.




- 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 Enreach Meetings 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.

Enreach Meetings Invitations

You can send invitations to Enreach Meetings to participants of a single or group chat.

To invite chat participants to Enreach Meetings

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




An invitation to Enreach Meetings expires after 15 minutes.

For further information on Enreach Meetings see *6 Enreach Meetings*, page 56.

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 31.

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.

My REACH : Work

← REACH status

Active status: Work

Override with Select override

Expiry time and date ☐

August 2023								
Mo	Tu	We	Th	Fr	Sa	Su		
31	01	02	03	04	05	06	15 : 00	
07	08	09	10	11	12	13		
14	15	16	17	18	19	20		
21	22	23	24	25	26	27		
28	29	30	31	01	02	03		
04	05	06	07	08	09	10		

While in Enreach MEETINGS

Set status to Inactive

SAVE AND CLOSE

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 Enreach Meetings" is deactivated or overridden. To use the status "While in Enreach Meetings", 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 Enreach Meetings or MS Teams call"

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



To link your status to Enreach Meetings 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 Enreach Meetings 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 Enreach Meetings or MS Teams call**, select the status to be set automatically as soon as you are in a Enreach Meetings session.
- 3 Click on **Save and Close**.
 - ✓ Your REACH settings are saved.
 - ✓ The selected status becomes active as soon as you are in a Enreach Meetings session or in a MS Teams call.



If you join a Enreach Meetings 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 Enreach Meetings 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 Enreach Meetings" will become active as soon as at least one guest joins your Enreach Meetings session.




If a manual REACH status override is set, it will remain active while you are in a Enreach Meetings session or in a MS Teams call. To activate your availability and the corresponding REACH status **While in Enreach Meetings or MS Teams call**, you must deactivate the manual status override, see *To deactivate the manual status overwrite*, page 20.

To deactivate the linking of your status to Enreach Meetings 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 Enreach Meetings 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 Enreach Meetings 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 Enreach 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 27.

2.6.4 MINIMIZE/MAXIMIZE

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

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

2.6.5 CLOSE

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

2.7 SOFTPHONE SUPPORT IN A TERMINAL SERVER ENVIRONMENT

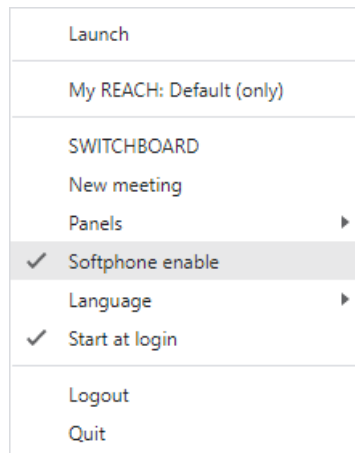
Enreach Contact Desktop can also be used on a terminal server to control a softphone on a users computer.

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 Enreach 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 Enreach Contact Desktop instance.

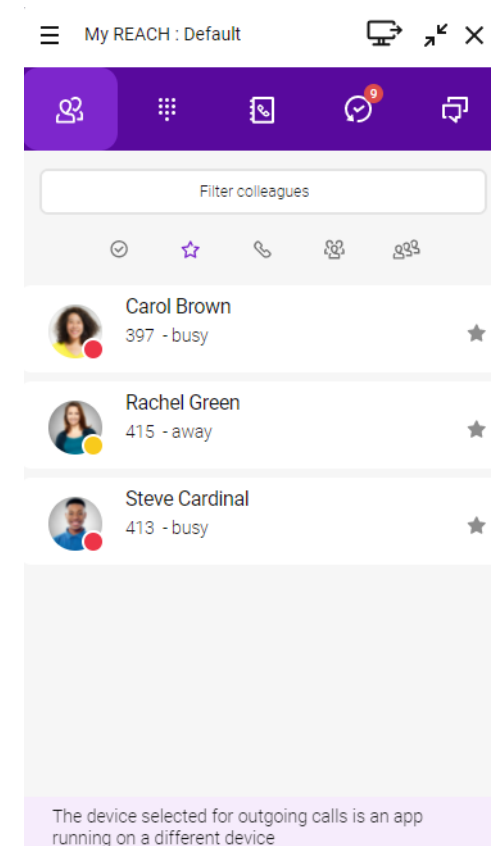
To enable softphone support in terminal server

- 1 Install Enreach 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 Enreach Contact Desktop.
- 2 Install Enreach Contact Desktop on your terminal server (e. g. Windows Server or Citrix).
- 3 Login with the same credentials to both Enreach Contact Desktop instances (local and remote).
- 4 Disable the softphone on your remote Enreach 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 Enreach Contact Desktop instance is already disabled.

- ✓ After every login to the remote Enreach 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 Enreach Contact Desktop icon in the notification area of your Windows PC or by clicking on the Enreach Contact Desktop icon in the menu bar of your Mac.

Option	Explanation
Starting	The application is launched and Enreach Contact Desktop opens.
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 20.
SWITCHBOARD	The SWITCHBOARD interface opens, see <i>To log in to SWITCHBOARD</i> , page 29.
Meetings	Your Enreach Meetings room opens, see <i>6 Enreach Meetings</i> , page 56.
Panels	You can expand your Enreach Contact Desktop interface with additional windows, see <i>Panels</i> , page 23.
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 Enreach Contact Desktop should be displayed.
Start at Login	Enable this option to start Enreach Contact Desktop automatically every time you start your PC.
Help	The online help for Enreach Contact Desktop opens.
Log out	Logs the current user off from Enreach Contact Desktop.
Quit	Exits the Enreach Contact Desktop application.

Panels


You can select, which panels you want to open besides your Enreach 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 Enreach Contact Desktop as an add-on.


How to open Panels

- 1 Right-click on the Enreach Contact Desktop icon  in the notification area of your Windows PC or click on the Enreach Contact Desktop icon in the menu bar of your Mac.
 - ✓ The Enreach 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 (Enreach Contact Desktop is active but in the background)

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


Call control on incoming call (Enreach Contact Desktop in foreground)

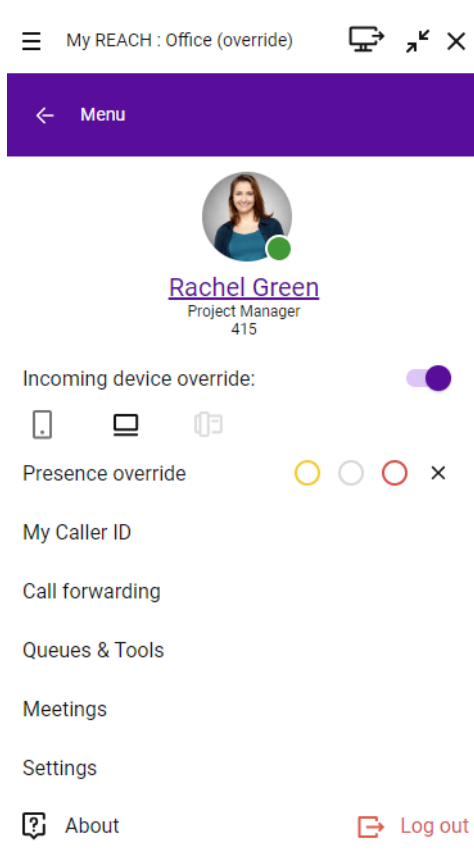
Action	Shortcuts
Answer incoming call	Ctrl + Alt + A
Reject incoming call	Ctrl + Alt + H
Transfer incoming call to a contact (without consultation)	Ctrl + Alt + F
Start transfer without consultation	Ctrl + Alt + B
Forward incoming call to your voicemail	Ctrl + Alt + V

Call control on active call (Enreach 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 ENREACH 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](#).

My REACH : Default

← My profile DONE

Carol Brown

Job title

Colour.Com

PHONE

Extension 201

Work mobile 0659842615

Add number

EMAIL

Work carol@colour.com

Add email

- 3 You can customize your profile picture, job title, phone number(s) and email address.
- 4 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

- 1 Activate the **Incoming device override** option in the menu.
- 2 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 Enreach 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 10.

To set your presence status

- 1 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).

Icon	Explanation
	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 Enreach Contact Desktop. Your status is changed to Busy (red) when you have a voice call or a meeting via Enreach Meetings.



To see how your manually selected status in Enreach Contact synchronizes with your status in Microsoft Teams, and vice versa, see *Impact of Microsoft Teams Status on Enreach Contact Status*, page 35 and *Impact of Enreach Contact Status on Microsoft Teams Status*, page 35.

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

- 1 Click on **My Caller ID** in the menu.
- 2 Activate the option **Hidden**.
- 3 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

☰  Voicemail

   .

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 Enreach 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/
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 Enreach 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.

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 Enreach Meetings during or outside a call. For more information on starting meetings, see *6 Enreach Meetings*, page 56.

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 Enreach Meetings, see the documentation for Enreach Meetings.

Set status "While in Enreach Meetings"

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



To link your status to Enreach Meetings, 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 Enreach Meetings

- 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 Enreach Meetings**, select the status to be set automatically as soon as you are in a Enreach Meetings session.
- 3 Click on **Save and Close**.
 - ✓ Your REACH settings are saved.
 - ✓ The selected status becomes active as soon as you are in a Enreach Meetings session.



If you join a Enreach Meetings 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 Enreach Meetings**.



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



If a manual REACH status override is set, it will remain active while you are in a Enreach Meetings session. To activate your availability and the corresponding REACH status [While in Enreach Meetings](#), you must deactivate the manual status override, see *To deactivate the manual status overwrite*, page 21.

To deactivate the linking of your status to Enreach Meetings

- 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 Enreach Meetings](#), select the status [Inactive](#) from the drop-down list.
- 3 Click on [Save and Close](#).
✓ Your status is no longer linked to Enreach Meetings.

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 Enreach 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 43.
 - 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 43.

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.

3.8.5.1 CONTACT CONNECT

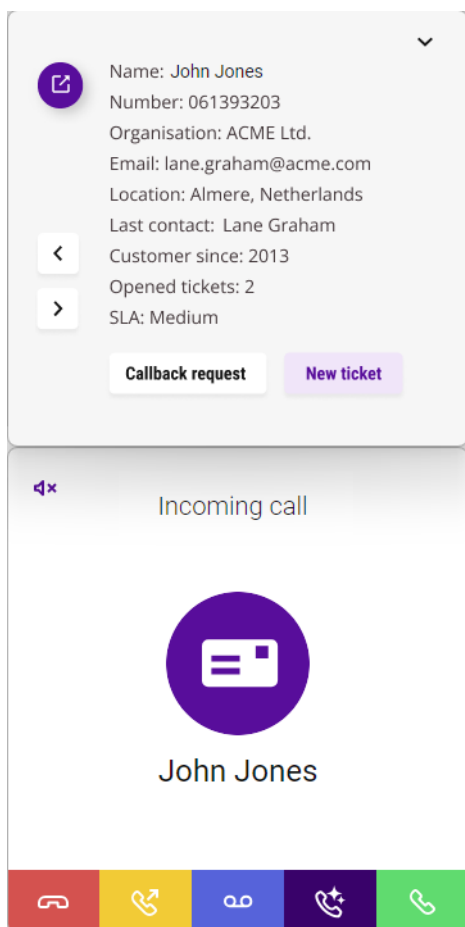
Contact Connect allows you to integrate Enreach Contact Desktop with your Customer Relationship Management (CRM) or Enterprise Resource Package (ERP) or with your contacts database.



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

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 at <https://help.enreach.com/contact-connect/1.00/web/Enreach/en-US/>.

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 Enreach 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 Enreach Contact Desktop. Incoming calls from one of your Outlook contacts are displayed with the Microsoft integration in Enreach Contact Desktop. You can also find your Outlook contacts in the phonebook in Enreach Contact Desktop.

In addition, you can synchronize your presence status with Microsoft Teams. Status changes in Enreach Contact Desktop are reflected in Microsoft Teams, and vice versa. See *Microsoft Teams Presence Synchronization*, page 34 and *Impact of Enreach Contact Status on Microsoft Teams Status*, page 35.



This functionality is only available with the add-on Enreach Engage or 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

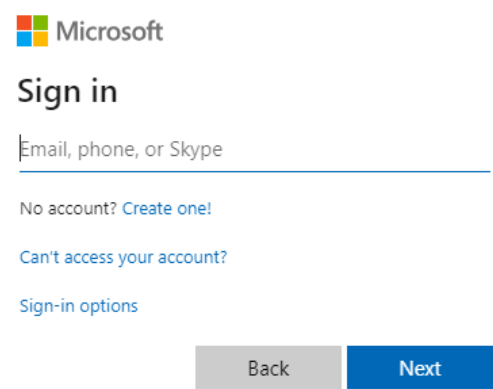
To activate the integration with Microsoft, you must log in to the Microsoft portal once.

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

- 2 Select **Integration settings**.

- 3 Activate the option **Integration with Microsoft**.

✓ The following dialog appears:



- 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 Enreach Contact Desktop.

Microsoft Teams Presence Synchronization

The Microsoft Teams presence synchronization ensures that your current status is consistently aligned between Enreach 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.

To enable Microsoft Teams presence synchronization

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

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



If you have already used Enreach 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 Enreach Contact, and how an Enreach Contact status is reflected in Microsoft Teams.

Impact of Microsoft Teams Status on Enreach ContactStatus

Teams Status (set by user)	Teams Status (set automatically, based on activity)	Resulting Enreach Con- tact Status
Available	Available	Available
	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

Teams Status (set by user)	Teams Status (set automatically, based on activity)	Resulting Enreach Con- tact Status
	Away last seen <time>	Away
Be right back		Away
Appear offline		No synchronization
	Offline	No synchronization

For more information on how your Enreach Contact status is displayed to users in your organization, see *Status Display*, page 10.

Impact of Enreach Contact Status on Microsoft Teams Status

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

For more information on how to override your status in Enreach Contact, see *3.3 Presence overwrite*, page 27.

3.8.5.3 GOOGLE INTEGRATION

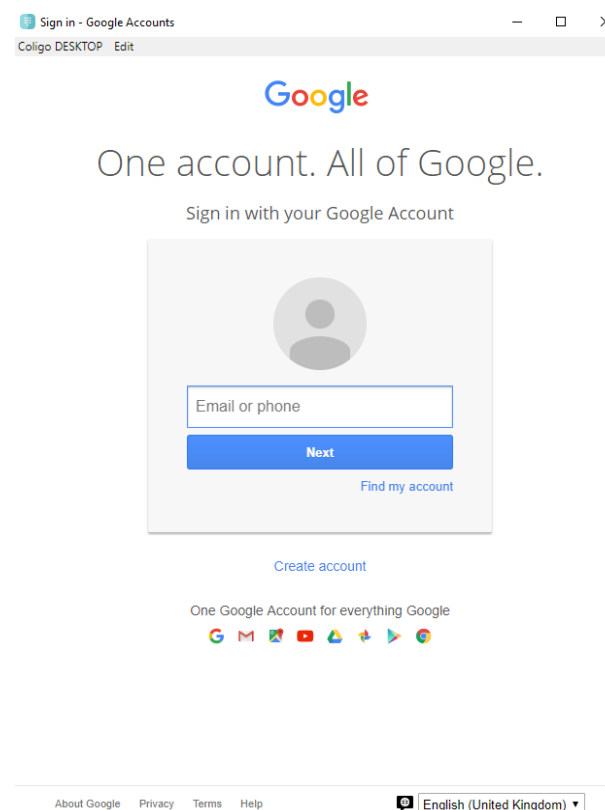
Google Integration allows you to integrate your Google contacts with Enreach Contact Desktop. An incoming call from one of your Google contacts is displayed with the contact's name in Enreach Contact Desktop using Google integration. All your Google contacts can also be found in Enreach Contact Desktop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

This functionality is available with the Enreach Engage add-on.

To enable Google Integration

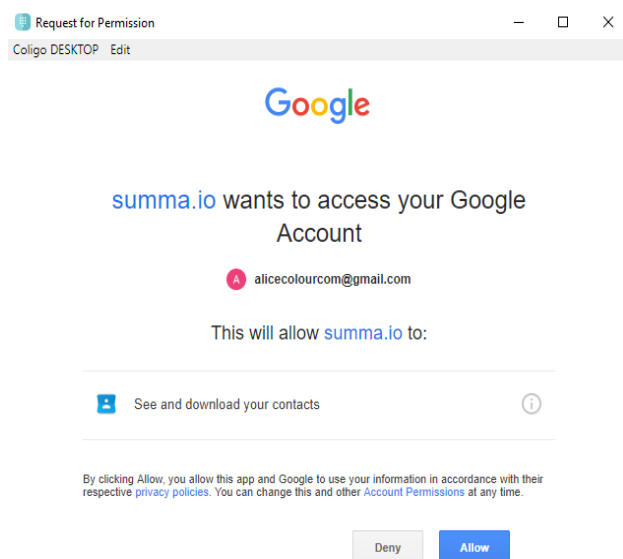
To activate the integration with Google, you have to register once at the Google portal.

- 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 Enreach Contact Desktop.

3.8.6 COLLEAGUES LIST SETTINGS

You can specify which action Enreach 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.

Option	Explanation
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 Enreach 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 Enreach 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?

-  Google Chrome
-  MakeCall
-  Microsoft Edge

☒ 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 Enreach 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 Enreach Contact Desktop

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

4 CALLING WITH ENREACH CONTACT DESKTOP

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

Enreach 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 an 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.



Incoming call




Steve Cardinal

Colour.Com




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

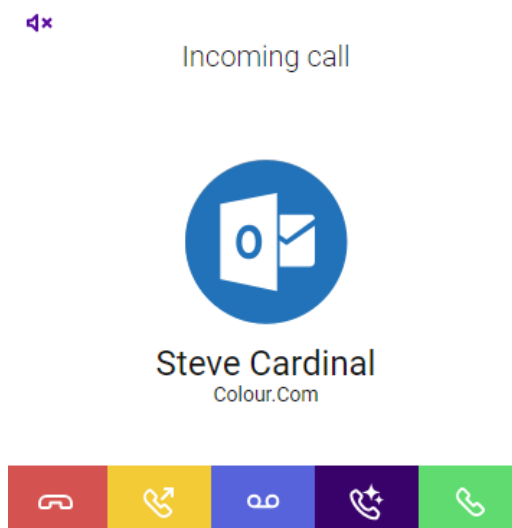
- 1 When you receive an incoming call, click the  icon in the pop-up window or on the toolbar.
 - ✓ The call attempt is interrupted immediately.

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 Enreach Contact Desktop.



For further information see also *3.8.5 Integration settings*, page 33.

To forward an incoming call to your voicemail


You are receiving a call.

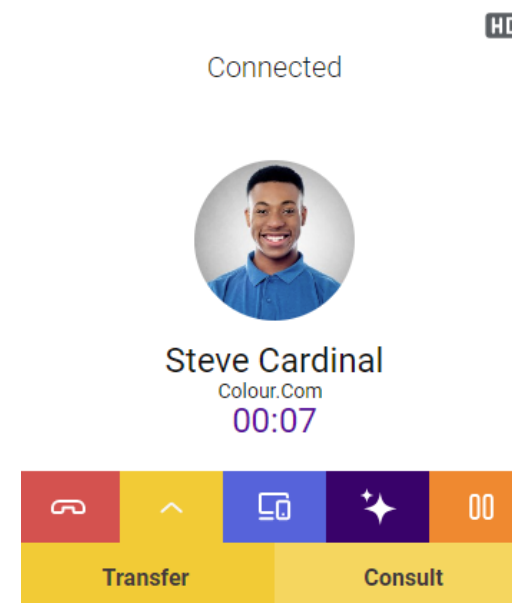
- 1 Click on .
✓ The call is immediately forwarded to your voicemail.

4.2 TRANSFERRING CALLS

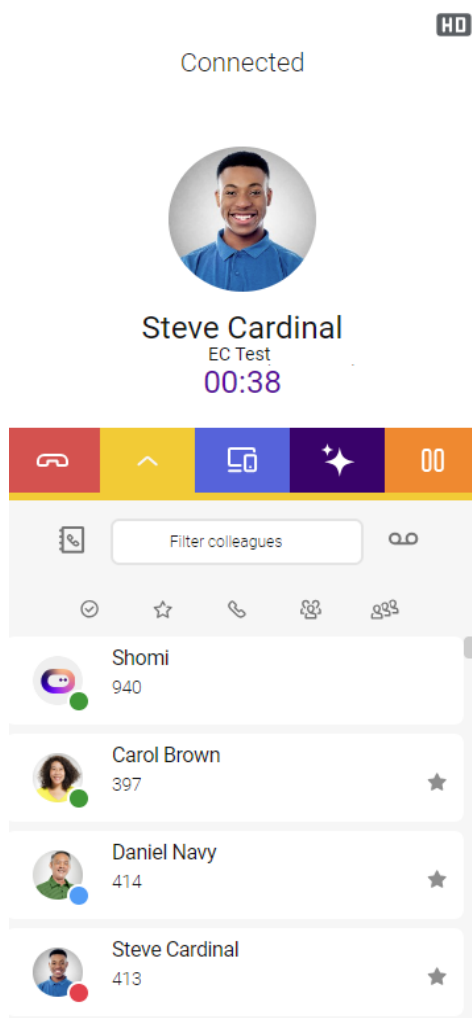
With Enreach Contact Desktop you can easily transfer an incoming or answered call to another contact or to another device.

To transfer an active call to another contact



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



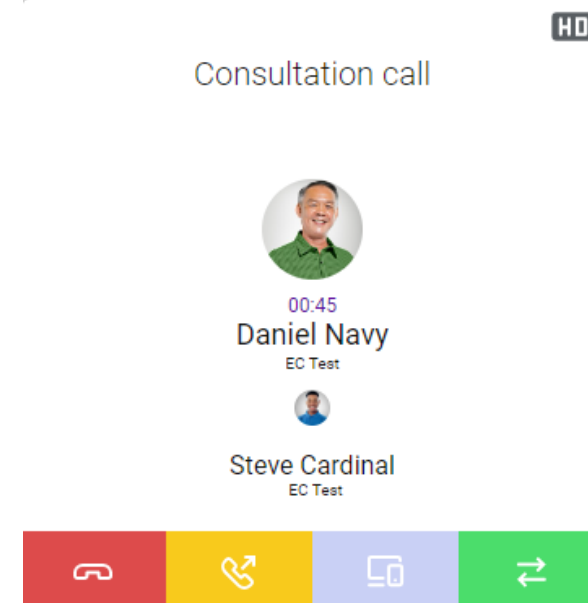
- 2 Click on **Transfer** to transfer the call without consultation or click on **Consult** to start a consultation call.
✓ In any case a menu for contact selection appears.





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 Enreach 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 11.

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 Enreach Contact Desktop. This is mandatory for Headset control. The selection **System default** will not allow headset integration.

My REACH : Default

← Audio settings SAVE

We are using echo to test audio devices. You should hear everything your microphone collects on your speakers.

[start echo test](#)

Microphone System default

Speakers System default

Headset control Jabra

Ringing System default

Softphone ringing sound ☒

Internal call modern formal

External call modern informal

Second call modern discrete

Dialpad audio feedback ☒



The **General** setting under **Headset control** connects headsets to Enreach 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 46).

If you regularly make calls with Microsoft Teams in addition to Enreach Contact Desktop, it is recommended that you use a Jabra headset and set **Headset control** to **Jabra**. With Jabra, Enreach 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 47). This setting is used to connect headsets with HID (Human Interface Device) support to Enreach 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 Enreach 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, Enreach 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 Enreach Contact Desktop (to answer, end, reject and mute calls via the headset buttons).

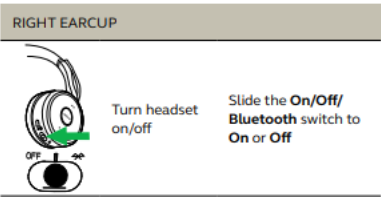


Currently, Microsoft Teams does not yet offer an option to disable headset controls within Teams (if it did, headset buttons could still be used within Enreach Contact Desktop).

Headset support

You can use features of headsets in Enreach 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



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 65	Link 370	Pro 935	Speak 510
Biz 2400	Engage 75	Evolve 40	Evolve 2 80	Link 380	Pro 9450	Speak 710
		Evolve 65			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 Enreach 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 Enreach 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 Enreach 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 Enreach 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 outputUsing 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 51.

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 50.

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 53



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 Enreach 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 Enreach 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 82 in the Enreach 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

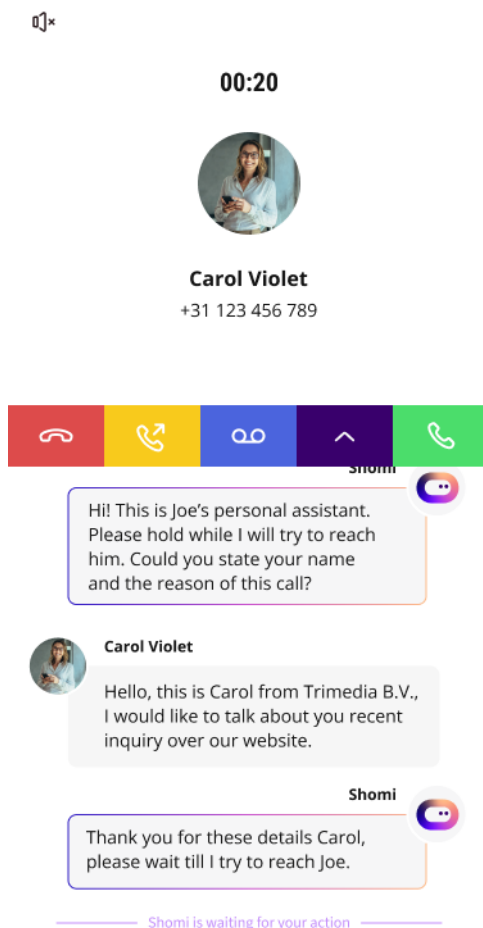


- 1 Click on .
 - ✓ The Shomi dialogue appears.
- 2 Click on **YES, PLEASE**.

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

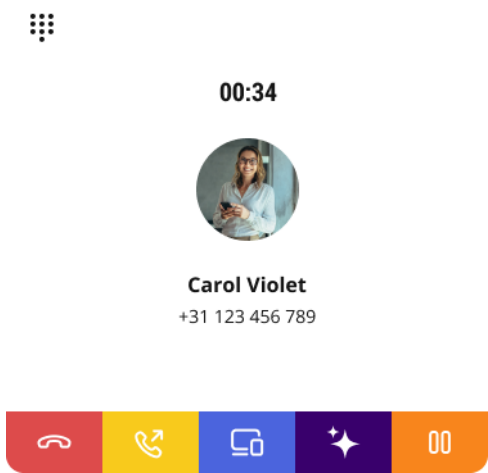
You are in a phone call. You would like to have the information from the call summarized after the call.



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 54. 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

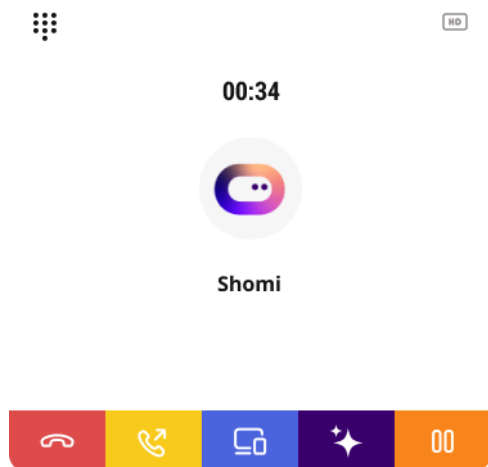
With Shomi it is particularly easy to record meetings, summarize them and send meeting minutes.



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 54. 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.

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
- 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.

Enreach Contact EULA

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

<https://www.enreach.com/en/enreach-contact-eula>

Enreach Contact Data Privacy Statement

At Enreach, we value your privacy and are committed to protecting your personal data.

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




<https://www.enreach.com/en/security-privacy/privacy/enreach-contact-privacy-statement>

6 ENREACH MEETINGS

Enreach Contact Desktop offers a seamless integration with the Enreach Meetings 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

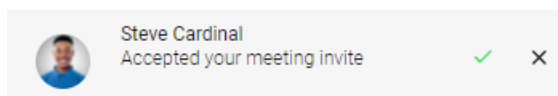
To invite a contact from your contact list to Enreach Meetings


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

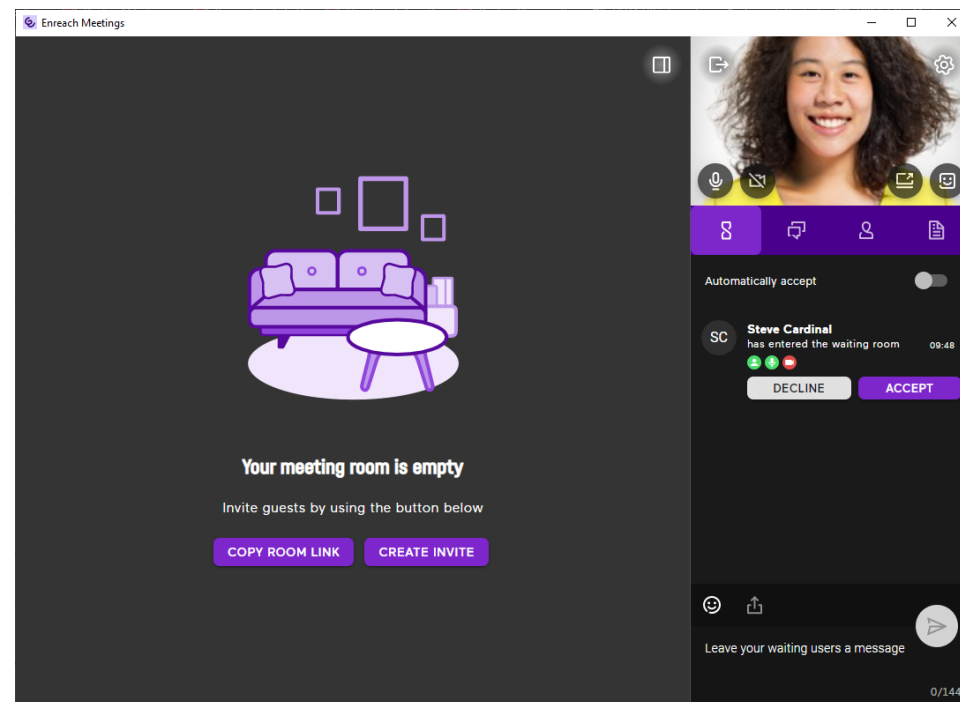


You can view, edit or delete the invitation in the chat of the contact.

- 4 If the invited guest has accepted the Enreach Meetings 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.



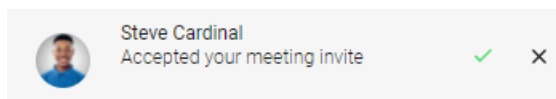
To ensure that you are not disturbed during a Enreach Meetings session, you can set a "While in Enreach Meetings" status. The status is activated as soon as you are in a meeting with at least one participant. You will not be disturbed by incoming calls during the meeting, as these will be routed depending on the configuration in the REACH app or in operator, see *Set status "While in Enreach Meetings or MS Teams call"*, page 21.


To start a meeting from a single chat

- 1 Open the chat .
- 2 Expand the options for the contact you want to invite to MEETINGS by clicking on .




- 3 Click on the meeting invitation icon .
- ✓ The invitation is sent.

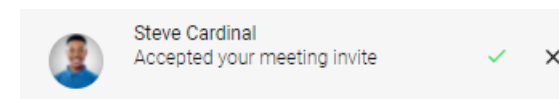
- 4 If the invited guest has accepted the MEETINGS invitation, you will receive a notification.




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

To start a meeting from a group chat

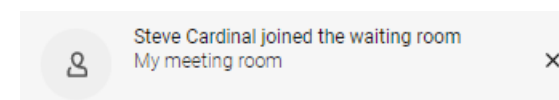
- 1 Open the chat .
- 2 Expand the options for the group you want to invite to MEETINGS by clicking .
- 3 Click on the meeting invitation icon .
- ✓ The invitation is sent to all members of the group chat.
- 4 If the invited guest has accepted the MEETINGS invitation, you will receive a notification.




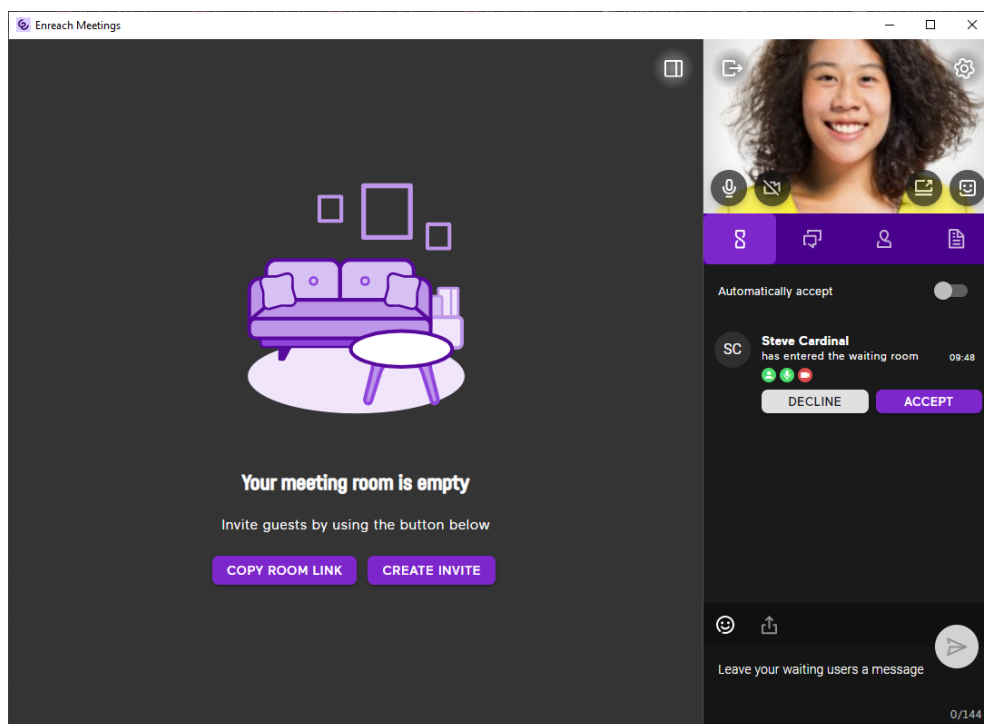
- 5 Click on .
- ✓ The conference room of the meeting opens.

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

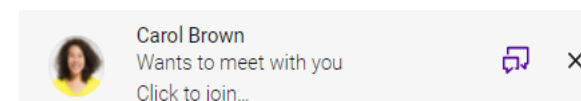
You can accept a MEETINGS invitation directly through Enreach Contact Desktop.





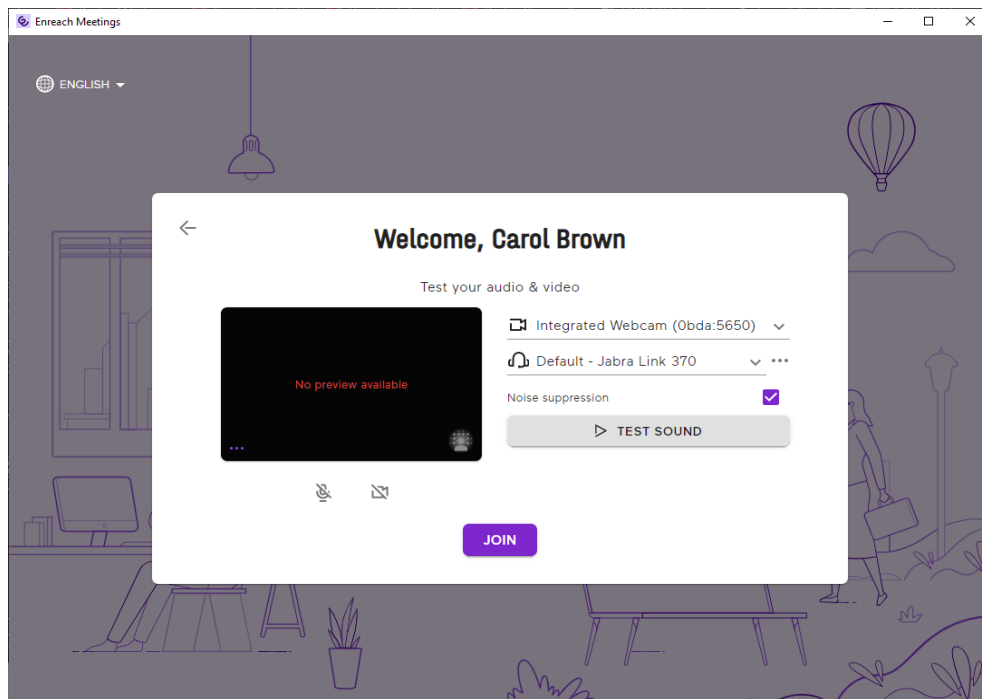
You will find all MEETINGS invitations in the chat. This way you can attend a meeting later. An invitation expires after 15 minutes.

To accept a Enreach Meetings invitation

You have received a MEETINGS 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 Enreach Meetings, see the documentation for Enreach Meetings.

7 SOFTWARE UPDATE

When a new version of Enreach 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.

Enreach 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

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

[Version 1.37](#)

[Version 1.36](#)

[Version 1.35](#)

[Version 1.34](#)

7.1.1 VERSION 1.37

This new version of Enreach 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 7.

Seamless Client Updates

Enreach 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 52.

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.
- DTMF tones are available in call control via the dialpad.

7.1.2 VERSION 1.36

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

Enreach Contact AI assistant Shomi

Further improvements

Enreach Contact AI assistant Shomi

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

- Call Shomi from colleuage 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 48.

Further improvements

Headset Yealink WH64 support

Conatct Connect with more CRM fields and CRM action buttons

7.1.3 VERSION 1.35

This new version of Enreach 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

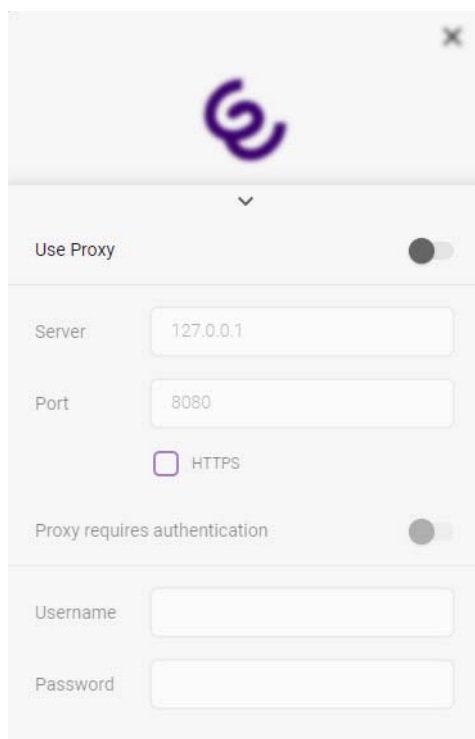
Further improvements

Support for HTTP/HTTPS proxy

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

To set up Enreach Contact Desktop in http/https proxy environments

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



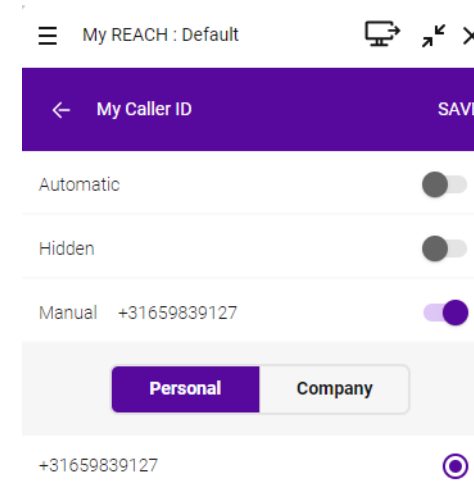
- 2 Activate **Use Proxy**.
- 3 Enter the server and the port and, if necessary, activate HTTPS for the HTTPS proxy.
- 4 If the respective proxy requires authentication, activate the lower switch and enter your user name and password.

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:



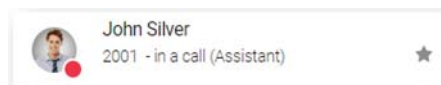
- 2 Select one of the following options:
 - **Automatic**: uses your REACH configuration to determine the caller ID used for all outgoing calls
 - **Hidden**: hides your caller ID so that you are shown anonymously for all outgoing calls
 - **Manual**: a number you choose, either your personal or company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

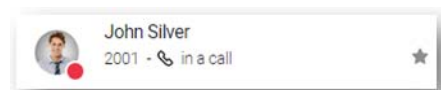
could therefore not see when the manager was available to forward an assistant call to the manager, for example.

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 Enreach 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.

7.1.4 VERSION 1.34

This version of Enreach Contact Desktop contains the following improvements:

MSI in machine context

Further improvements

MSI in machine context

The installation process for the Enreach 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 uninstall 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 Enreach Contact Desktop has been updated (Electron 30) to be up to par with contemporary standards.
- Answer button missing for group calls within remote Enreach Contact Desktop setup: When using Enreach Contact Desktop in remote setup (eg terminal server) the answer button was not available on the remote instance of Enreach Contact Desktop. 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.

8 REQUIREMENTS

To use Enreach 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, Enreach Contact Desktop will not function or will function only partially.

Operating Systems

The latest Enreach Contact Desktop version (v1.34) requires at least Windows 10 (64 bit only) or macOS 10.15 (Catalina).

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 Enreach 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	iam.voipoperator.eu Update to: aim.voipoperator.eu	TCP	443
Reach API	reachapi.ispworks.nl	TCP	443
Media	89.184.190.0/24	UDP	16384 - 32768
Signalling	iam.voipoperator.eu Update to: aim.voipoperator.eu	TCP	443, 4006

Description	IP address domain	Protocol	Port
File transfer	iamfile.voipoperator.eu	TCP	4006
Enreach Connect Login and Recognition Service (only required when using the Enreach Connect Addon)	Update to: 51.144.182.8	TCP	443
Enreach Connect Download Service (only required when using the Enreach Connect Addon)	52.239.140.202 52.239.142.100 13.80.19.225	TCP	443
Enreach Connect Remote Log Service (only required when using the Enreach 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