

click2dial5

User's Guide

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Following short form is used: c2d5 = click2dial5

Sign In

Starting the client there are two types to sign in. The options which are available depend on the configuration of the c2d5 server.

- **©Windows Credentials**
The signed in ©Windows user will be signed in at c2d5 automatically.
- **Manual Registration**
Regardless of the ©Windows user who is logged in, the user can sign in with the own login data.

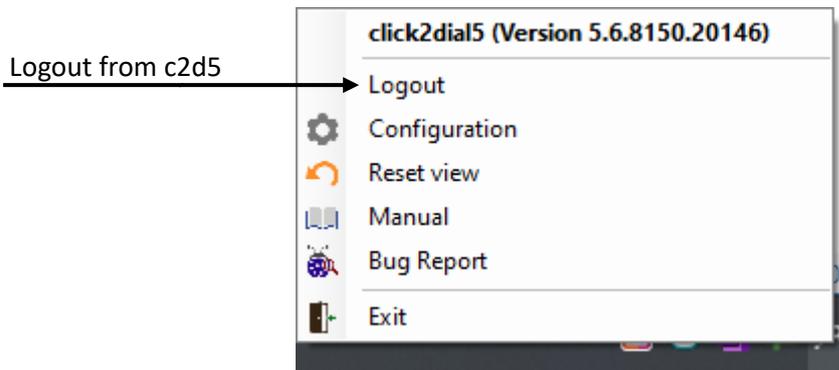
The login data can be saved.

Logout

Logged in users have the option “Logout” in the profile in the **Home Tab**.

A security request follows. If the logout is not confirmed within 10s, the user remains logged in.

Logging out is also available by right-clicking on the **c2d5 Icon** in the taskbar:

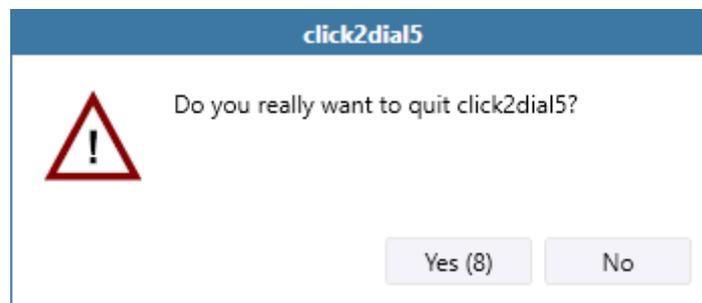


A security request follows. If the logout is not confirmed within 10s, the user remains logged in.

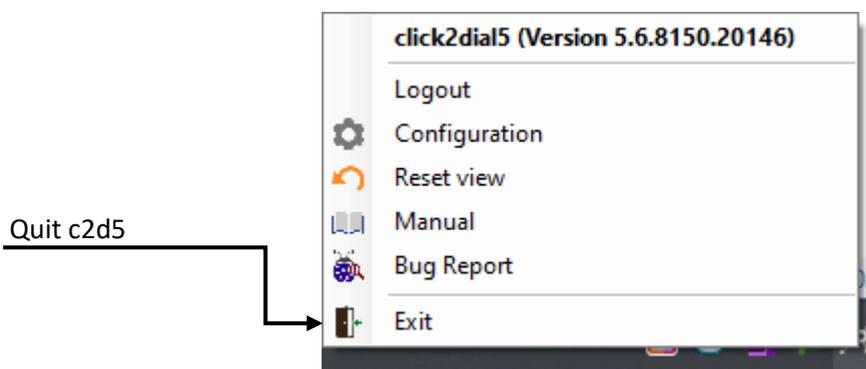
Quit Client

To quit the client, click on the cross  in the upper right corner of the **Main Window**.

A security request follows. If c2d5 should not be closed, a confirmation of “**No**” must be given within 10s, otherwise the client will be closed.



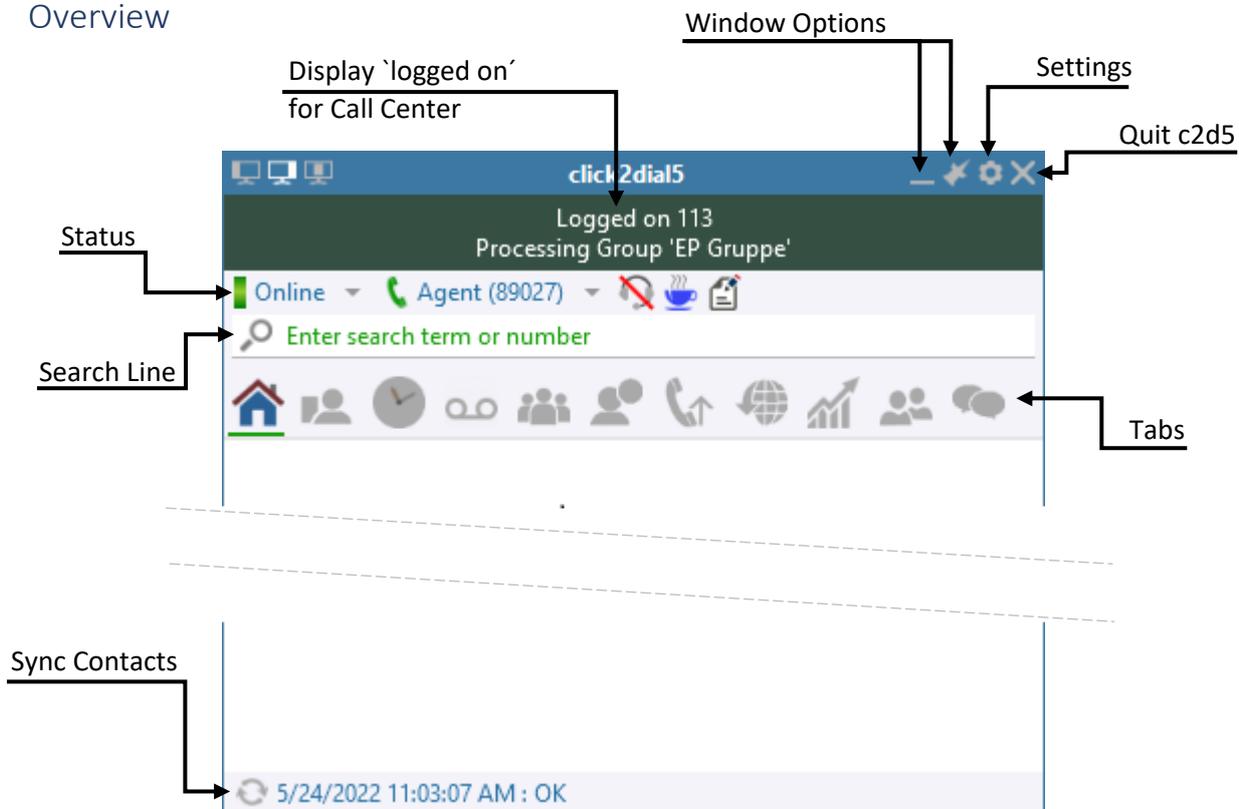
Quitting the client is also available by right-clicking on the **c2d5 Icon** in the taskbar:



No security request follows. The client is closed immediately.

Main Window

Overview



Search Line

The search line is always available regardless of the selected tab.

If a phone number is entered in the search line, it can be directly called by pressing the enter key.

In the settings there is the possibility to empty the search line after one minute. See the chapter **Settings/Configuration -> Further Display Options**.

When entering names, company, and phone numbers, depending on the selected tab these are searched in the **Contacts Tab** or in the **Journal Tab** and displayed if available. Different criteria must be separated with a space.

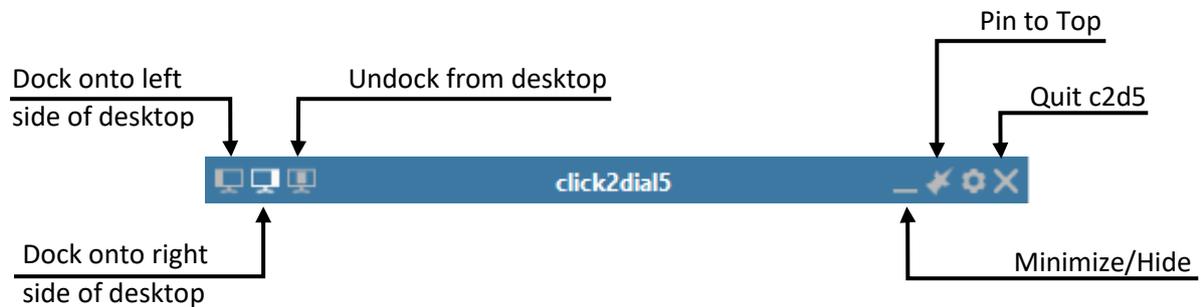
Example:



If you had searched in the **Journal**, you could search for the entry directly in the **Contacts** by pressing the enter key.

Window Options

Overview



 **Dock Left** – The window is displayed on the left side of the screen.

 **Dock Right** – The window is displayed on the right side of the screen.

 **No Dock** – The window can be placed anywhere on the screen.

 **Minimize** – The window will be hidden.

With a click on the **c2d5 Icon**  in the taskbar, it is displayed again.

 **Always on Top** – The window is kept permanently in the foreground and is always displayed.

 **Exit** – The window is closed and c2d5 is quitted.

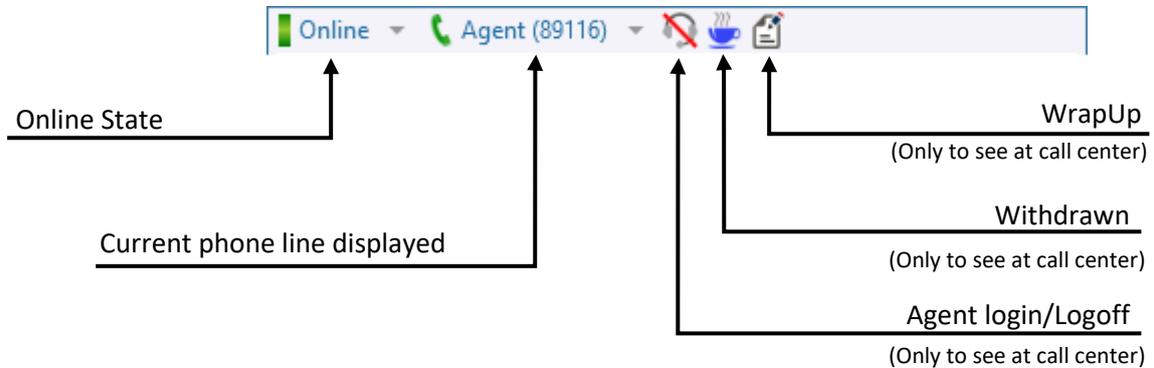
 **Configuration** – Opens the client settings menu. See chapter [Settings/Configuration](#).

Change Window Size

To resize the client window, you first must undock the window from the desktop.  Resize the undocked window by dragging the edge of the window with the mouse. When the window is docked again, it keeps the changed size.

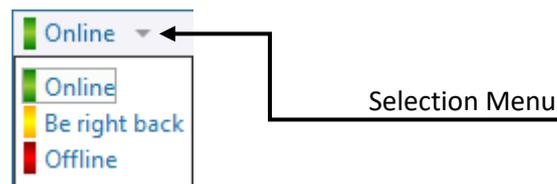
Status Indicator

Overview

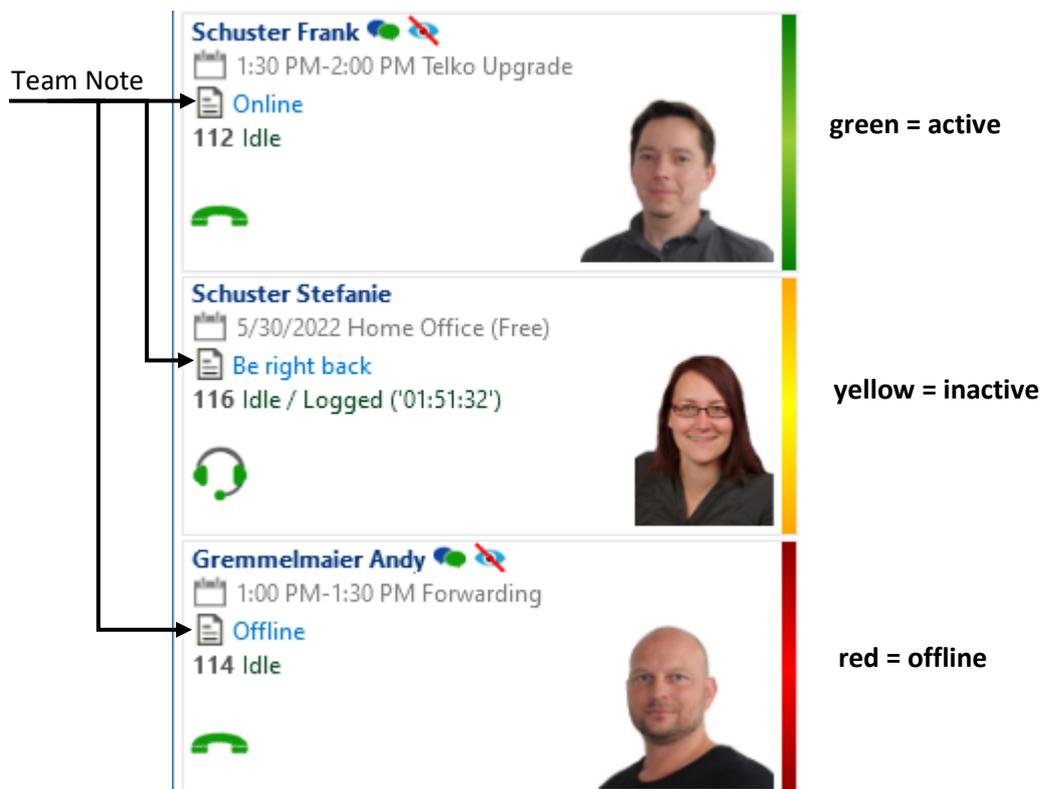


Online State

The Online State can be changed to **“Online”**, **“Be right back”** or **“Offline”**. If the user is inactive for a certain period of time, the status automatically changes to inactive. The time after which this happens can be configured on the c2d5 server. The next time the user is active, **“Online”** will be displayed again.

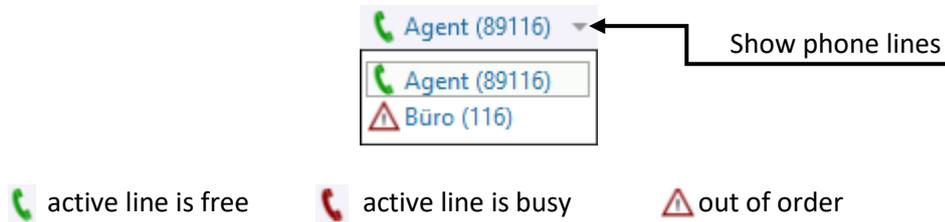


The color of the **Online State** is displayed in the **Team Tab** and written in the **Team Note**.



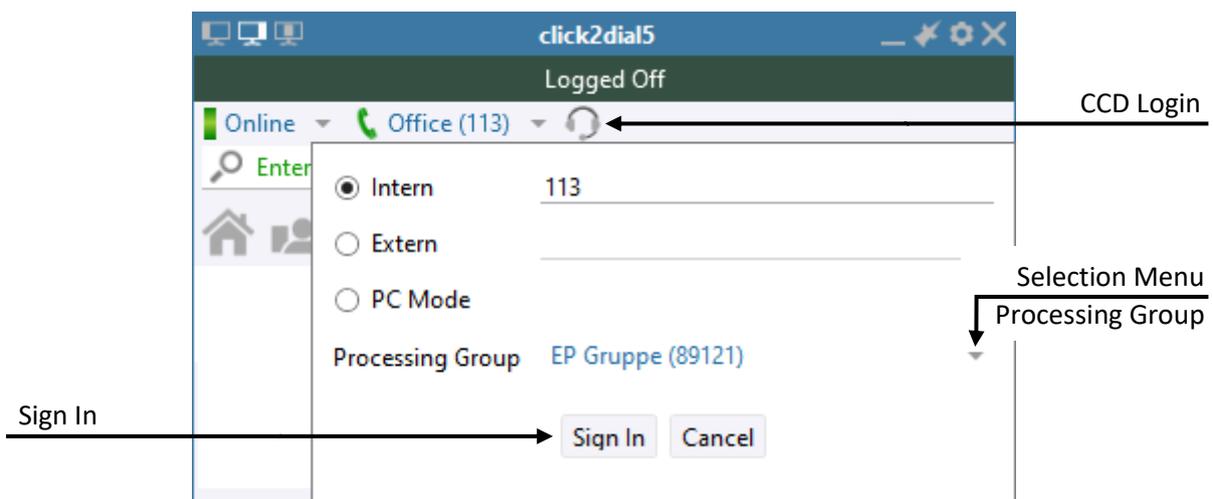
Current Phone Line

The current used phone line is displayed on top. If the user has several phone lines, it's status can be seen here. Active lines can be chosen.



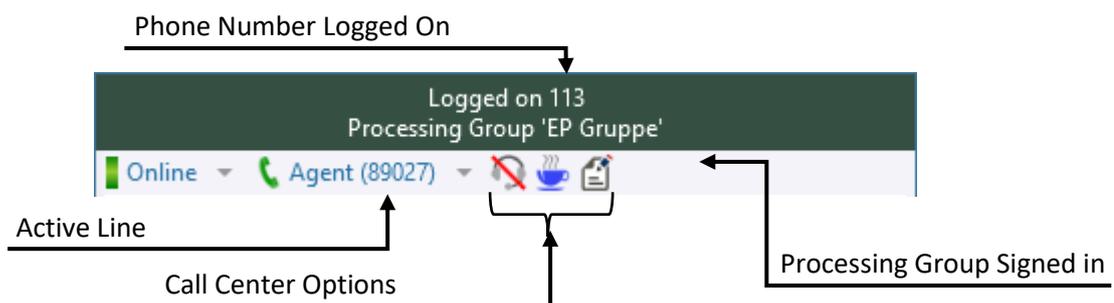
CCD Login

Clicking on the **CCD Login Icon** in the **Main Window** opens a window to choose different logging on options. Choose one and click the **Sign In** button to log in agent at call center.



- Intern** Use your office phone to make calls.
- Extern** Use an external phone number to login. Calls will be received on this.
- PC Mode** Use the PC and a head set to make calls without an extra device.

After signing in the logging information is shown in the top of the client. Example:



Intern

Enter your office phone number to sign in.

Enter Office Phone Number →

Intern 113
 Extern 00151 xxxxxxx
 PC Mode

Processing Group EP Gruppe (89121)

Sign In → Sign In Cancel

Selection Menu Processing Group

Extern

To sign in with an external number, type a 0 in front of the used number:

Enter External Number →

Intern 113
 Extern 00151 xxxxxxx
 PC Mode

Processing Group EP Gruppe (89121)

Sign In → Sign In Cancel

Selection Menu Processing Group

Incoming calls can be accepted on the registered external device. If calls are made, this device rings. Accept the call to start the conversation on this device.

Select Processing Group

Agents with the right to choose the processing group they sign in, have a drop-down menu to select from. If an Agent wants to sign in without being assigned to a processing group, they choose: ---- ()

Intern 113
 Extern
 PC Mode

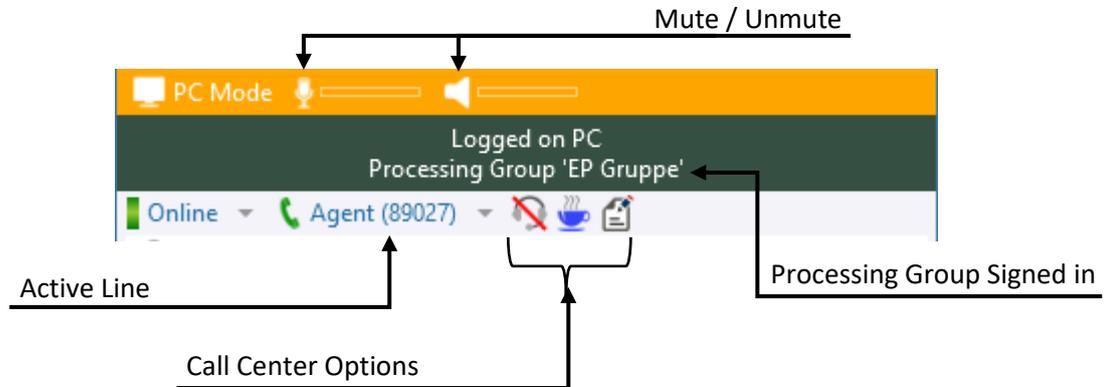
Processing Group EP Gruppe (89121)

Selection Menu Processing Group

---- ()
 CCD Test1 (895001)
 EP Gruppe (89121)

PC Mode

If you signed in your call center agent in **PC Mode**, a yellow bar is shown in the top of the client.



To activate/deactivate muting of the microphone or speaker, click on the corresponding icon:

activate muting: / deactivate muting: /

To quit **PC Mode**, log off the agent by clicking on this icon:

Call Center Options

Click on the icons to do following actions:

- CCD Login** - Agent will be signed in at call center.
- CCD Logoff** - Agent will be signed off at call center.
- Withdrawn** – Agent is not available for CCD. Team gets message that he is taking a break.
- WrapUp** - Agent is not available for CCD. Team gets message that he is doing after call work.

Contact Sync



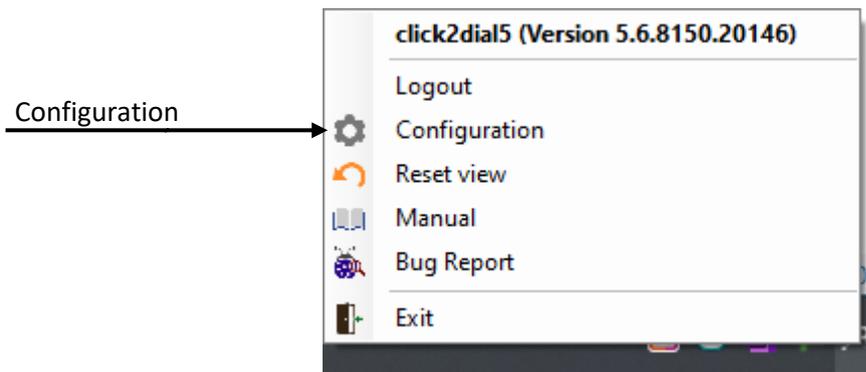
To start **Contact Sync**, click on this icon in the bottom of the window:

Settings/Configuration

Clicking on the gear  in the **Main Window** will open the **Settings Menu**.

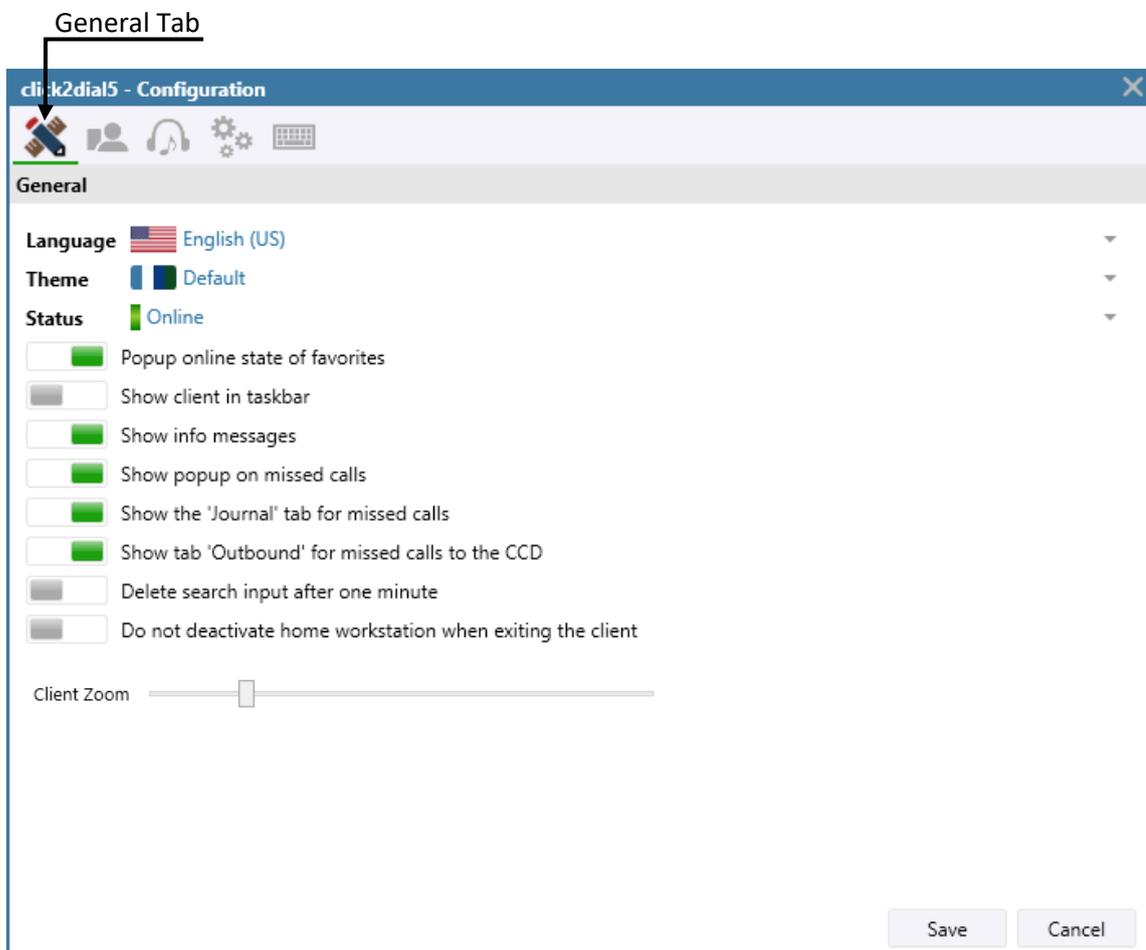


Right-clicking on the **c2d5 Icon**  you can also find the **Settings Menu**.



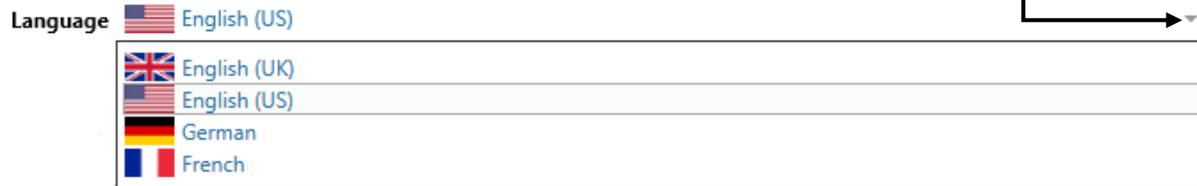
General

Overview



Language

Following languages are available:



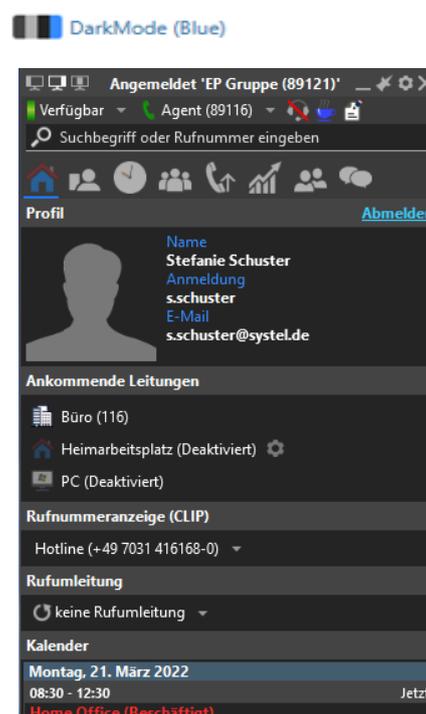
The client must be restarted to apply the new setting.

Color Theme

To change the window colors following themes are available:



Examples:



Status

Here you can choose which online state is displayed when starting c2d5.



Further Display Options

In the **General Tab** following display settings can be made and popups can be activated:

Show client in taskbar

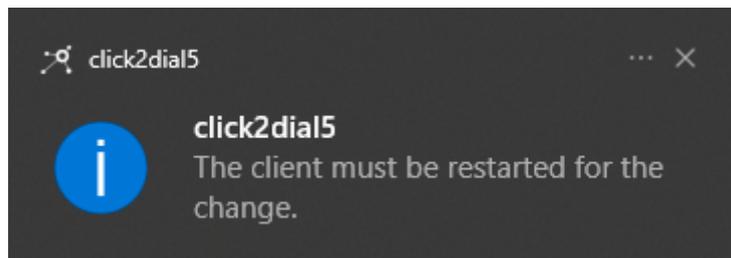
If you set this, the client icon is shown in the ©Windows taskbar when it's active:



Show info messages

Program hints of the client can be set here.

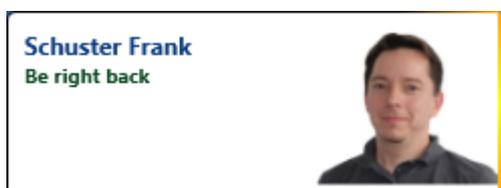
Example of info message:



Popup online state of favorites

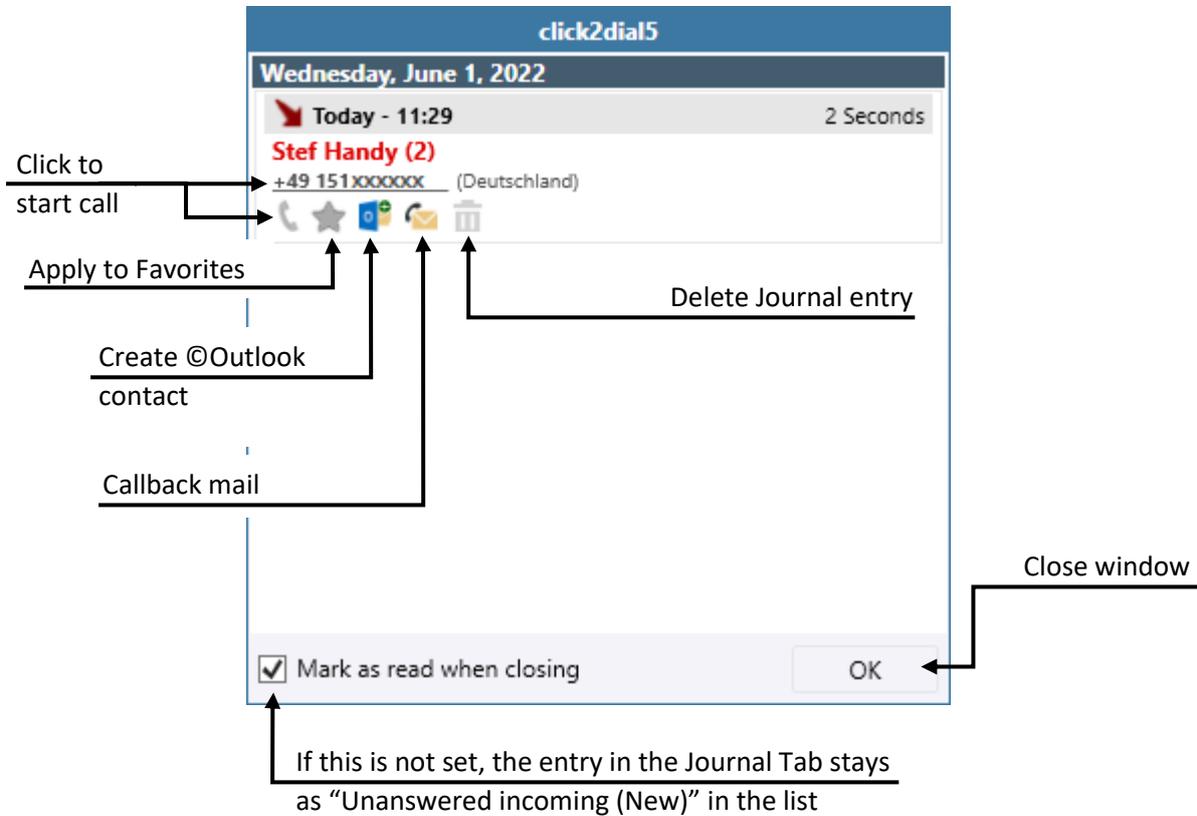
If you set this, a little popup window shows up on the upper left of your screen when favorites change their online state.

Examples:



Show popup on missed calls

If this is set, a popup appears when you missed calls. Otherwise, these are only in the **Journal Tab**.



Show the 'Journal' tab for missed calls

If the client should switch to the **Journal Tab** automatically when there are missed calls, this has to be set.

Show tab 'Outbound' for missed calls to the CCD

If the client should switch to the **Outbound Tab** automatically when there are missed call center calls, this must be set.

Delete search input after one minute

If this is set, the search input will be deleted after one minute.

Active Home Workstation

Do not deactivate home workstation when exiting the client

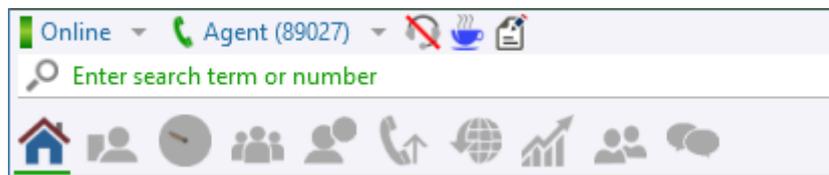
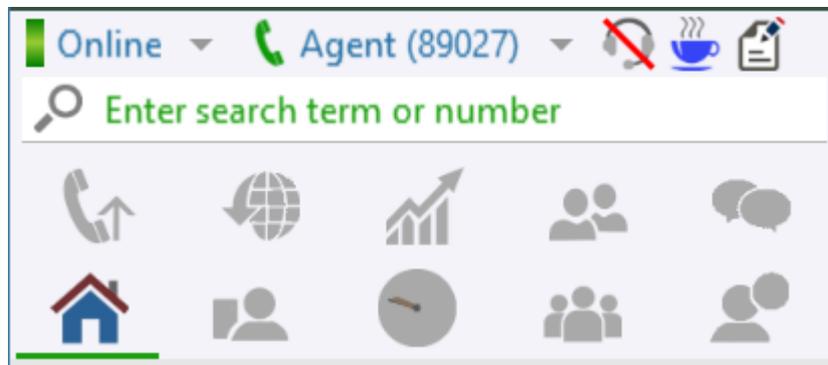
If this is set, the home workstation will not be deactivated when exiting the client. The nomadic connection can still be used after quitting the client. This does not work for call center agents.

Client Zoom



The client zoom can be used to adjust the font and icon size. The further to the right the controller is pulled, the larger the display is.

Examples:



Contacts

Overview

For each available contact database, it has an own tab. Which contact databases are available, is configured on the c2d5 server. By setting checkmarks the directories are chosen. Chosen directories are available in the **Contacts Tab** of the client.

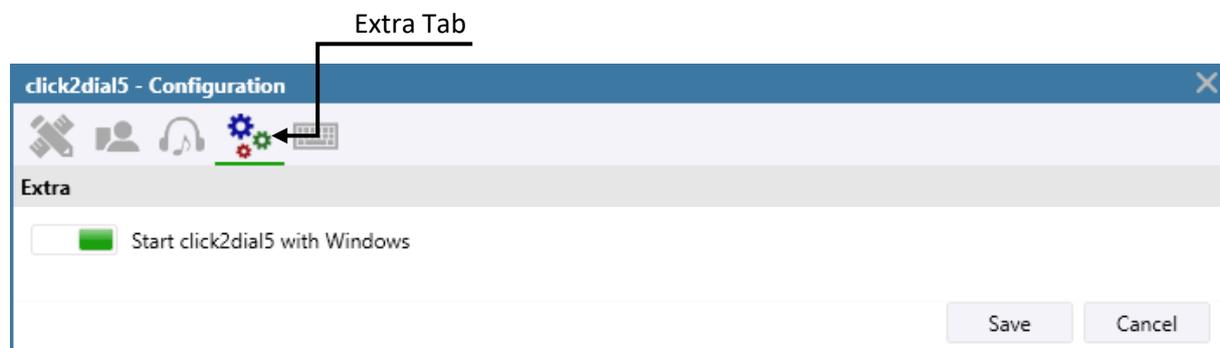


Possible client contact databases are: ©Outlook, ©IBM Lotus Notes, and ©DasTelefonbuch.

Extra

Start c2d5 with ©Windows

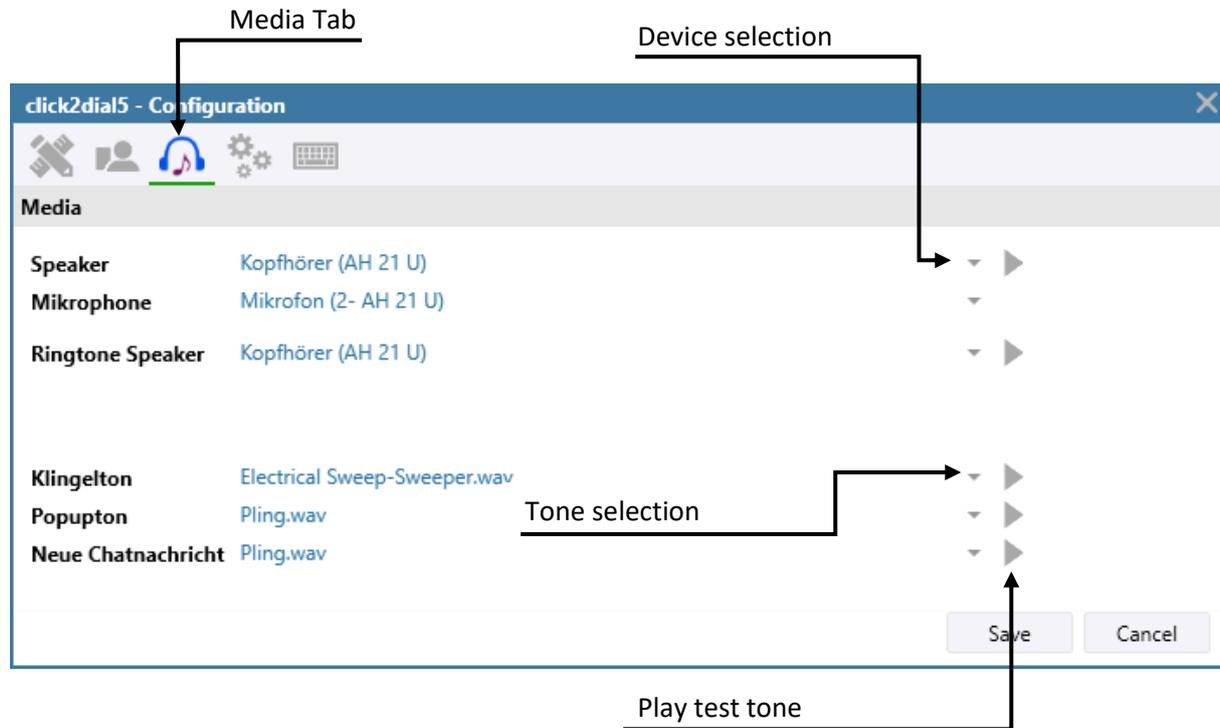
If the client should start with ©Windows, you can set it here.



Media

Here you can choose and test media devices and ringtones for the **PC-Mode** and system tones. Available media devices depend on your system.

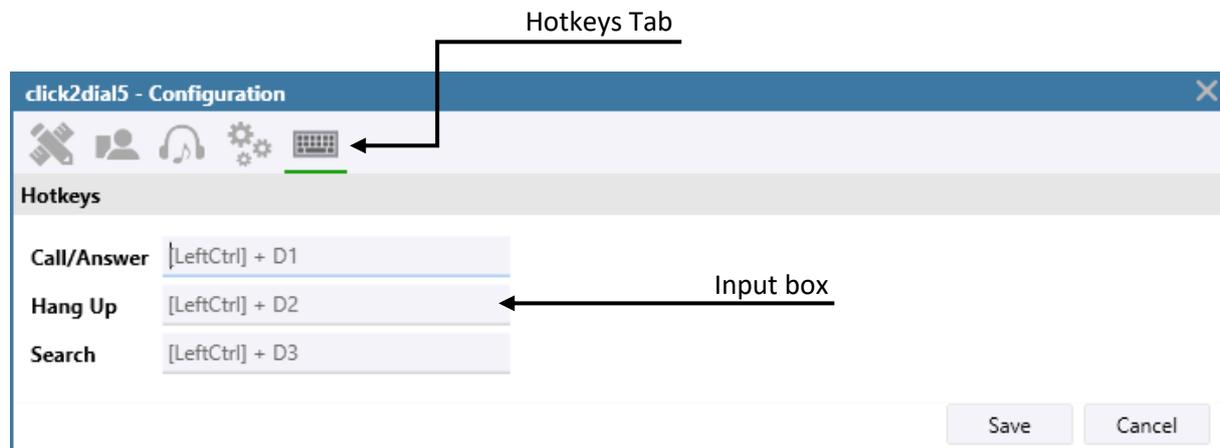
Overview



Hotkeys

The right to choose or adjust hotkeys must be configured on the c2d5 server, otherwise this window is greyed out.

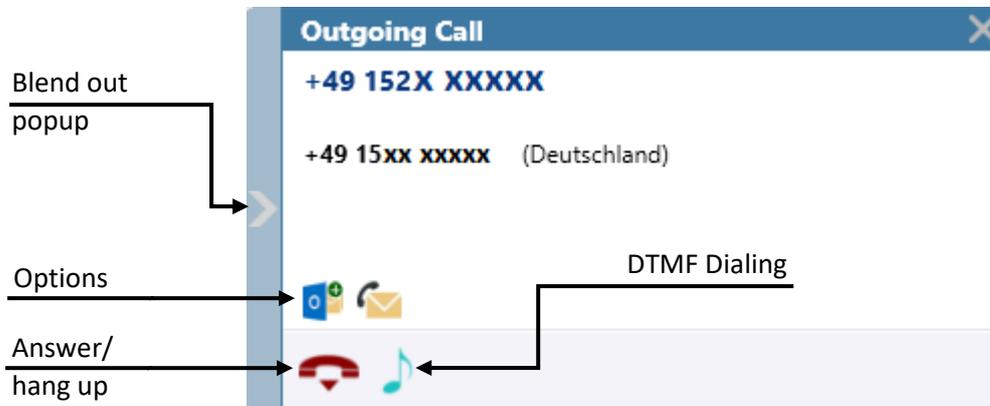
To define a key combination, click in the input box and then press the key combination you want to use. In this example LeftCtrl+2 to hang up. Make sure that the hotkey is not used by other systems.



Call, Answer, and Hang up

Calls can be done as usual by dialing on your desk phone or softphone.

At outgoing and incoming calls, a popup appears:



To accept or hang up a call, click on the **Telephone Receiver Icon**:



answer



hang up

Or use the configured hotkey. See chapter **Settings/Configuration -> Hotkeys**.

Click 2 Dial

Calling is from any application possible that allows copying a marked text to the clipboard. Mark the telephone number that you want to call and press the configured hotkey. See also chapter **Settings/Configuration -> Hotkeys**

Telefon **07031 416168-0** → For example: left ctrl+1

The formatting of the number is recognized automatically by c2d5.

Telephone Links

Telephone links on the internet can be clicked to start calls with the client.

[+49 7031 416168-0](tel:+4970314161680)

Enter in Search Line

In the **Search Line** entered telephone numbers can be called by pressing the enter button.



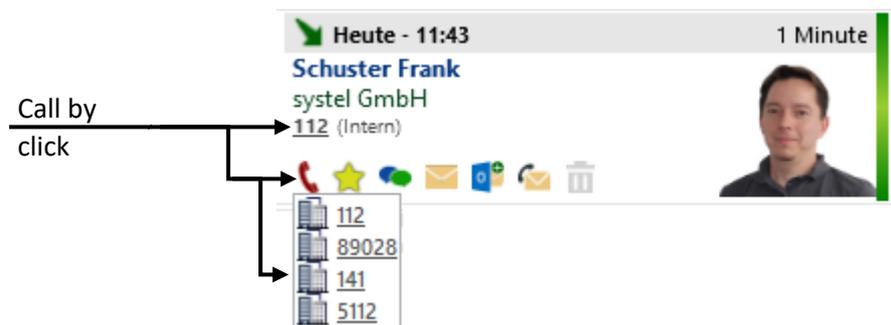
Call Client Contacts

To make calls you can also click on phone numbers in the c2d5 window or double click on team members in the **Team Tab**.

Example Contacts:



Example **Journal**:



Example **Team**:



Pick Up Calls

Calls can be picked up from team members by double clicking on the called person.

Calls per Command Prompt Console

To make calls with console insert the command **-dial + telephone number**:

Example:

```

C:\> Command Prompt
Microsoft Windows [Version 10.0.19044.1766]
(c) Microsoft Corporation. All rights reserved.

C:\Users\s.schuster>"C:\Program Files (x86)\systemel\click2dial5\click2dial5.exe" -dial 116
    
```

Hold

To put conversations on hold, press the **Hold Icon** in the caller popup:

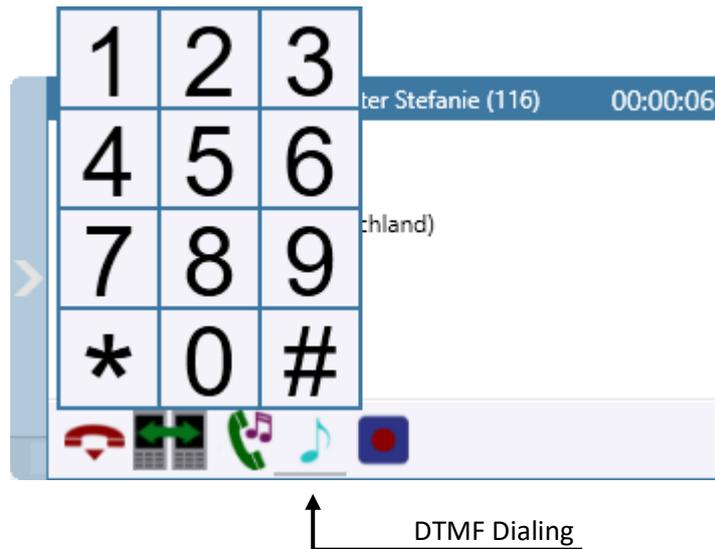


DTMF Dialing

To send key tones use **DTMF Dialing** by clicking on the **Note Icon**:



A keyboard appears. Here you can dial per mouse click:



Automatic Callback

Permission is required for this function. If the called c2d5 user is busy or doesn't answer, you can click this icon  in the **Caller Popup** to set an automatic callback. If the called user hangs up, your phone will ring, and you can start a call by answering the call. Unreached user's phones will flash to indicate a callback request.



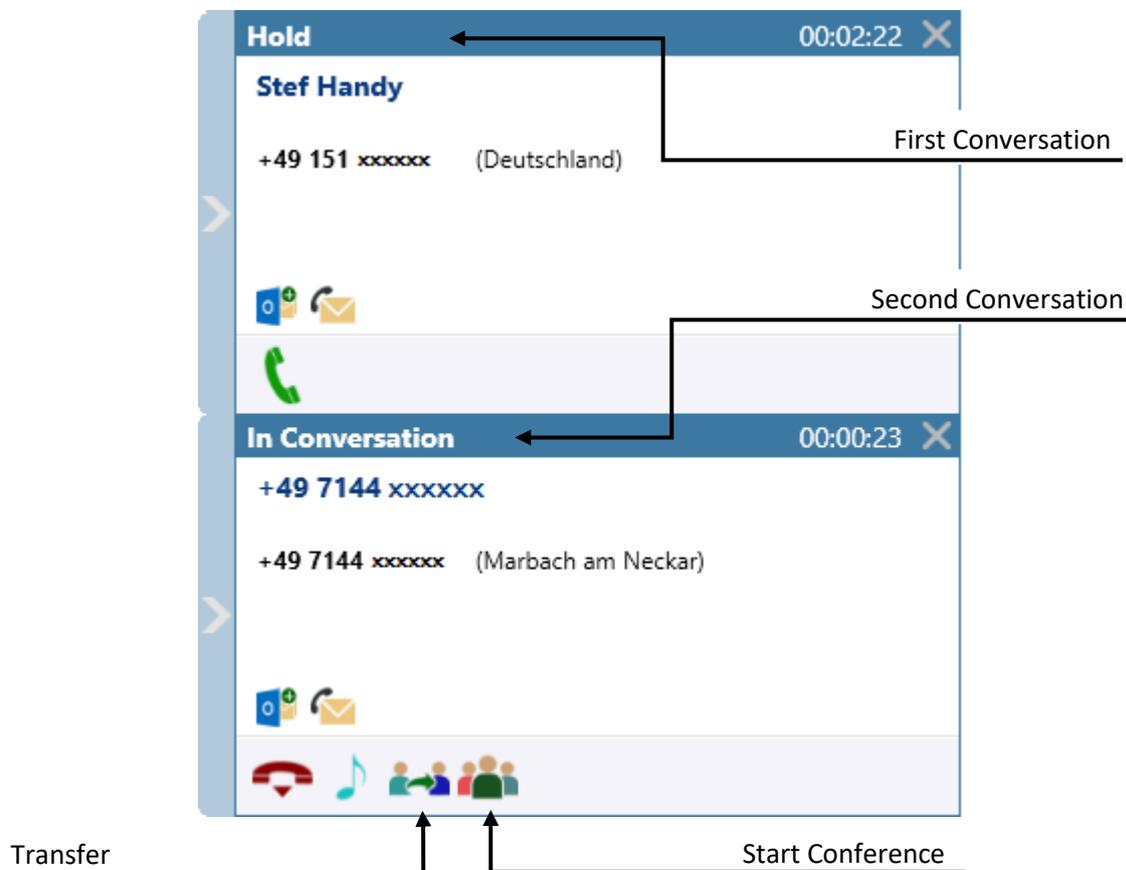
Record Conversations

If the user has an answering machine and the permission, conversations can be recorded. Click on the **Record Icon**  in the **Caller Popup** to record them. The recordings will be on the own answering machine as messages from the user himself. See also chapter **Answering Machine**.



Connect / 3-Party Conference

At another conversation another caller popup appears. Now it is possible to transfer the call or start a **3-Party Conference**.



Blend out/in Caller Popup

Clicking the arrow,  the caller popup is blends out. A bar remains, by clicking on the arrow  it is blended in again.

Close and Open Caller Popup

Clicking on the cross  the caller popup closes.

To open it again, click on the **c2d5 Icon** in the taskbar in the right lower corner:

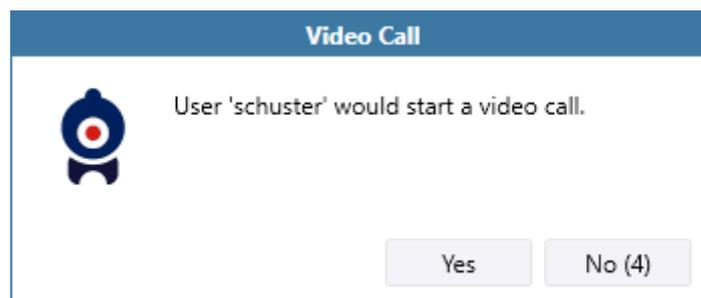


Video Call and Desk Sharing

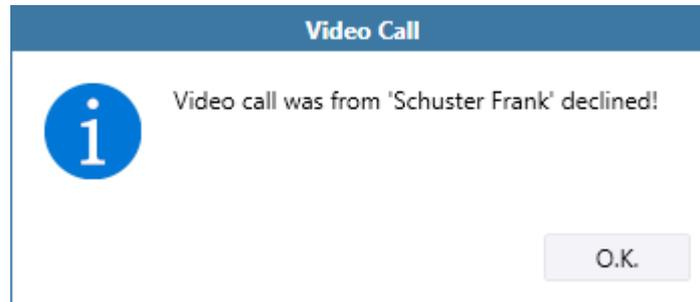
At calls with other c2d5 users there is **Video Call** or **Desk Sharing** as an additional function. For video calls an integrated or connected camera is needed. To start a video call, click on this icon  in the **Caller Popup**.



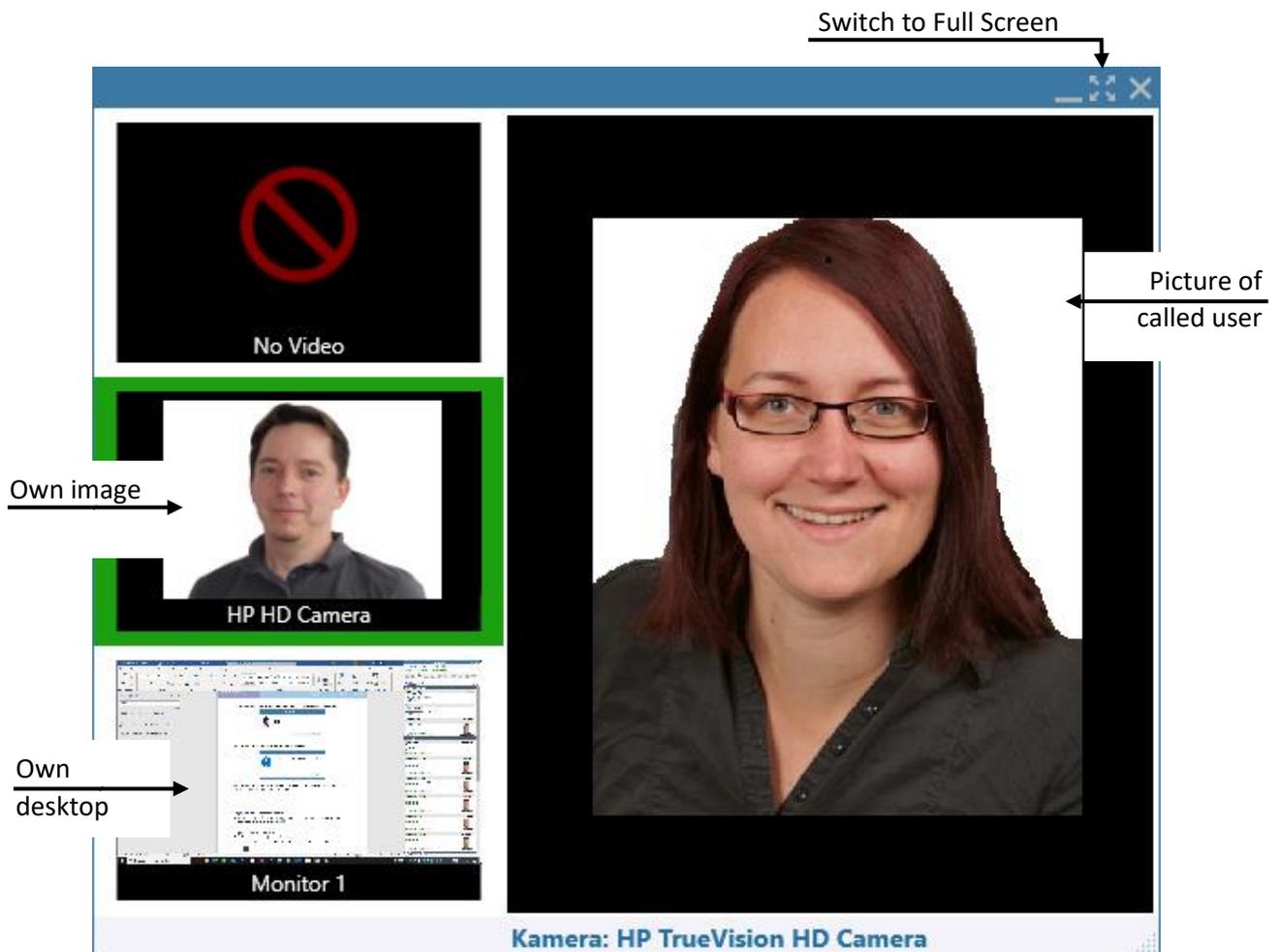
The called person gets an invite for the video call. This must be accepted in the next 10s or the video call will be rejected.:



If the called user rejects the video call you receive a message.



If the video call is accepted, a window will open to choose by clicking on the picture if the camera or the desktop is shared.



The marked window has a green outline. This content is seen by the other person.

If you don't want an image to be transmitted, click on "No Video".

To set the window on full screen click on . To return to normal screen size click on .

Options

Create @Outlook Contact

Clicking on this icon,  a window to create an @Outlook Contact opens.

In first choose where the contact is saved:



When clicking **OK** @Outlook opens. The contact can be edited before saving.

Open @Outlook / @IBM Lotus Notes Contact

If the contact is already saved, you get the opportunity to open the business card of the contact by clicking on the corresponding icons:

 Open @Outlook Business Card

 Open @IBM Lotus Notes Business Card

Please Call Back E-mail

Clicking on this icon  a new email with the existing data of the caller is created. The format for this can be configured on the c2d5 server. To edit and send the e-mail, click in the taskbar on it to open it.

Example:



Tabs

Home

Overview

Home Tab

Profile

Incoming lines

Externally displayed number

Call forward

Appointments

The screenshot shows the 'click2dial5' application window. At the top, it displays 'Online' status and 'Office (113)'. Below this is a search bar with the placeholder text 'Enter search term or number'. A navigation bar contains several icons, with the Home icon (a house) highlighted. The main content area is titled 'Profil' and includes a 'Logout' link. The profile section shows a photo of Stefanie Schuster and lists her details: Name (Stefanie Schuster), Login (s.schuster), and Mail (s.schuster@systemel.de). Below the profile is a section for 'Incoming Lines' with entries for Office (116), Mobile (Deactivated), Homeoffice (Deactivated), and PC (Deactivated). Further down are sections for 'Calling Line Identification Presentation (CLIP)' (Hotline +49 7031 416168-0), 'Forward' (No Forward), and 'Calendar' (Tuesday, June 21, 2022, 8:30 AM - 12:30 PM, Home Office (Free) in 3 Days).

Profile

In the **Home Tab** you can see the profile information.

Overview

Home Tab

Profile Picture

Take Photo

Search Photo

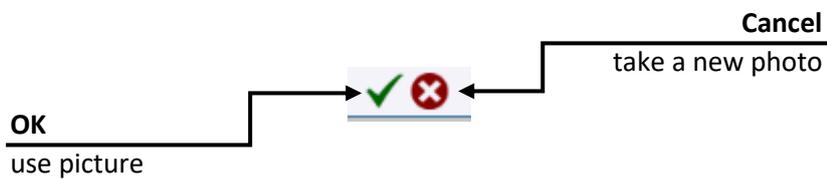
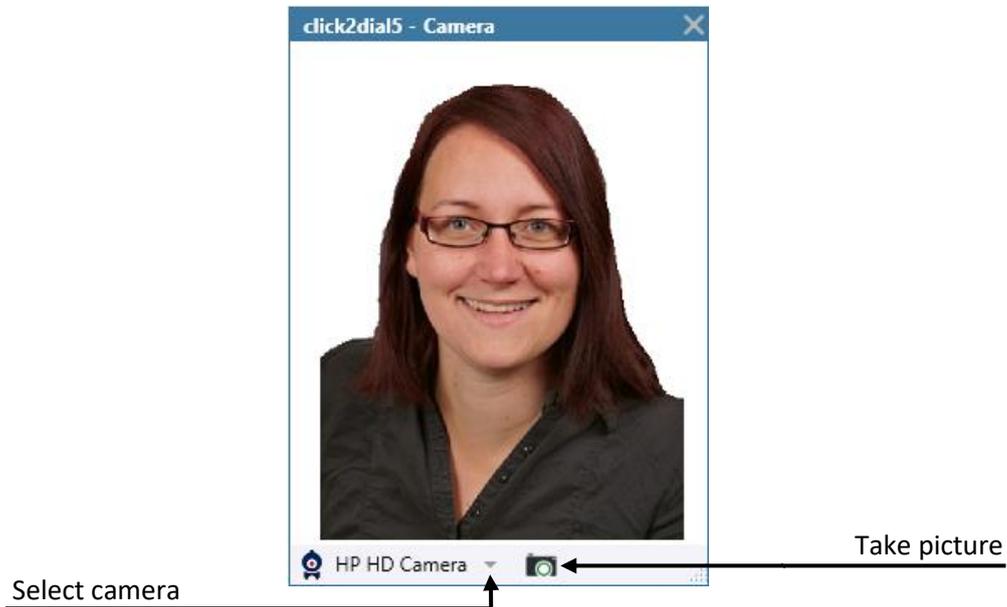
Delete Photo

This screenshot focuses on the 'Profile' section of the 'click2dial5' interface. It shows the 'Home Tab' icon highlighted in the navigation bar. The profile picture area is highlighted, showing a silhouette of a person. Below the silhouette are three icons: a camera (labeled 'Take Photo'), a magnifying glass (labeled 'Search Photo'), and a trash can (labeled 'Delete Photo'). The profile information to the right of the picture is: Name (Stefanie Schuster), Login (s.schuster), and Mail (s.schuster@systemel.de).

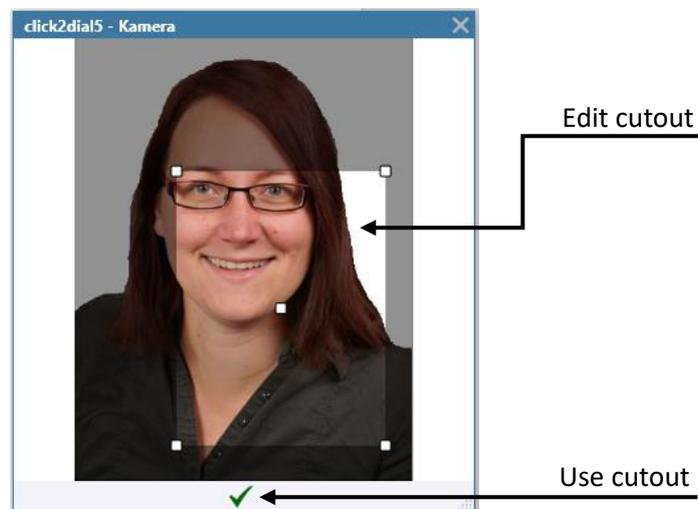
Change Profile Picture

In the **Home Tab** the profile picture can be taken, changed, or deleted.

 **Take photo** – Take a photo for the profile picture.



 **Search photo** - Use an existing photo on your PC as your profile picture.

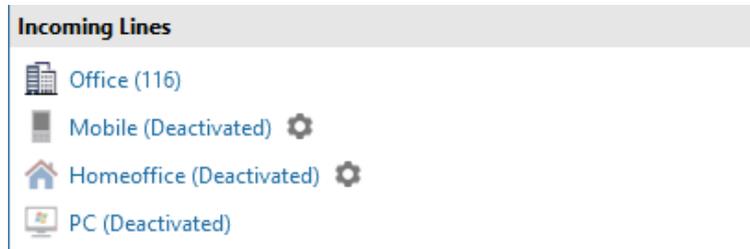


 **Delete photo** – Delete profile picture.

Incoming Lines

In the **Home Tab** you can choose with a click on which line you want to accept calls. The incoming lines, which are available, are configured on the c2d5 server.

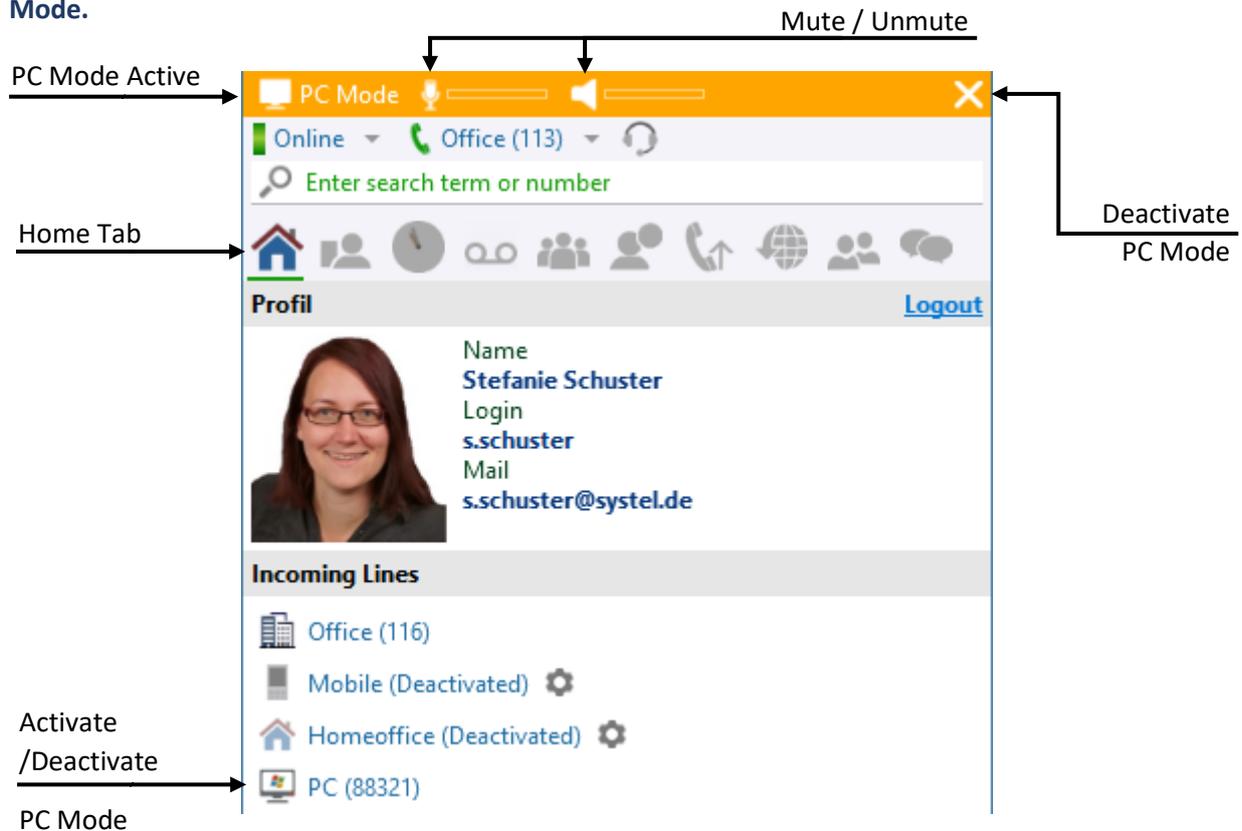
Example:



Office (116) The standard used line is the office line.

PC Mode

PC (Deactivated) In **PC Mode** you can make calls with c2d5 without a telephone set. The client acts like a softphone in this case. To choose this line, click on it in the **Home Tab**. You can see a yellow bar in the top of the client, if the **PC Mode** is active. This **PC Mode** cannot be used as a call center agent. To use **PC Mode** as a call center agent, see chapter **Main Window-> CCD Login-> PC Mode**.



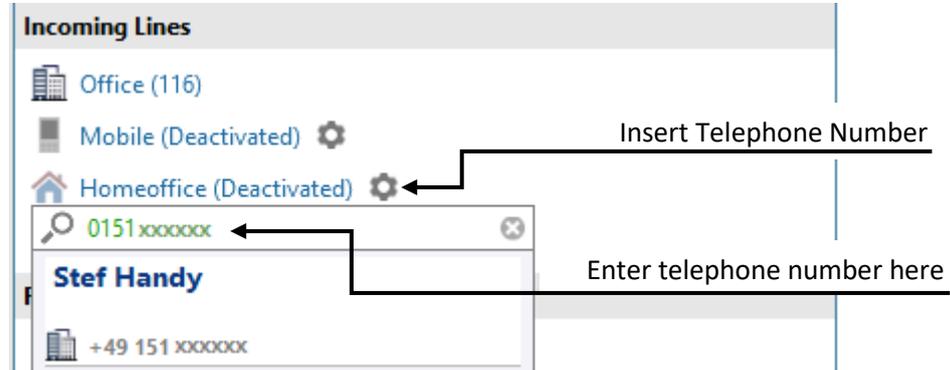
To activate/deactivate muting of the microphone or speaker, click on the corresponding icon:

activate muting: / deactivate muting: /

To quit the **PC Mode** click on the cross or choose an other incoming line.

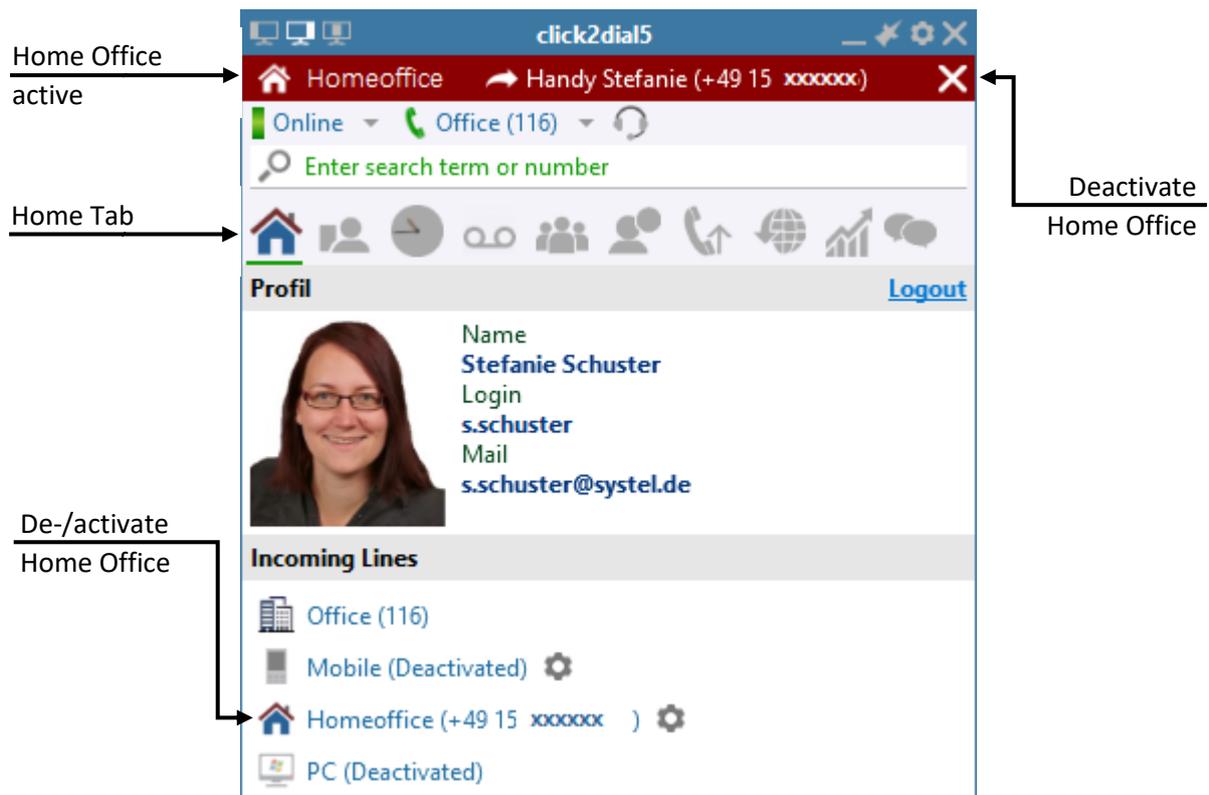
Home Office – Nomadic

 **Homeoffice (Deactivated)**  When using this line, the first time, a telephone number must be inserted to take calls at. For this click on the **Gear Icon**,  enter a phone number and press the enter key.



If there is already a telephone number registered, the **Home Office Line** can be activated directly by clicking on it.

If the **Nomadic Connection** is active, the used telephone number is displayed in a bar in the **Main Window**.



To deactivate the **Nomadic Connection**, click on the cross  or choose another incoming line to accept calls at.

By clicking on the **Gear Icon**,  the phone number for the **Nomadic Connection** can be changed.

To use this line the user must not be logged in at a call center. To use Nomadic as a call center agent, see chapter **Main Window-> CCD Login-> Extern**

Remote Extension

The **Remote Extension** is used to make calls on a mobile device.

 **Mobil (Deaktiviert)**  If the user has a remote extension installed, he can switch it on and off in the **Home Tab** underneath **Incoming Lines**. This is not able for call center. To activate/deactivate click on „Mobile“.

To enter the number of the used mobile device, click on the **Gear Icon**. 



If the **Remote Extension** is active, incoming calls can be accepted on the deposited mobile phone.

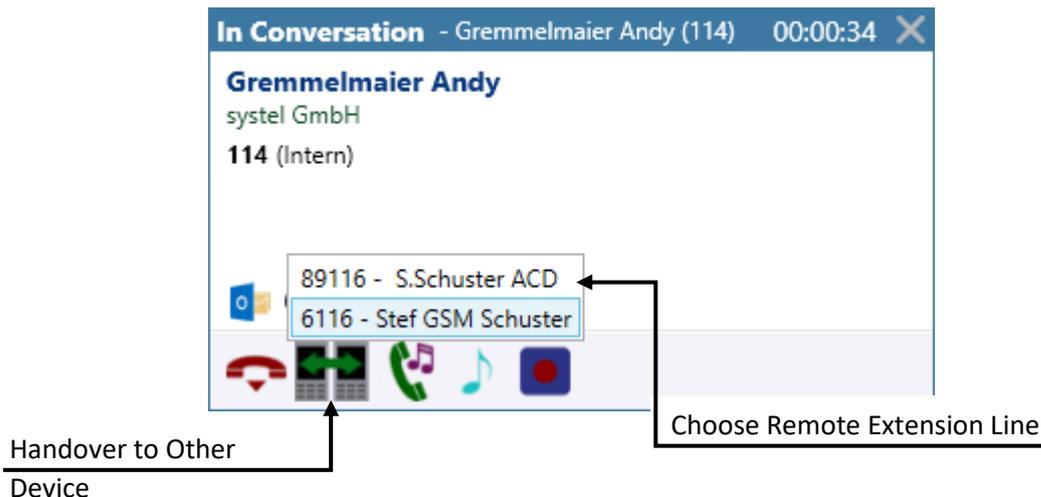
If outgoing calls are made, the deposited mobile phone rings, accept this call to start the call on this device.

Handover Call to a Mobile Device

With an installed remote extension, it is possible to handover calls to a mobile device without interruption. To do this, the user must not be logged on to the call center.

In the **Caller Popup** you have the option to handover to a mobile device while being in a conversation.

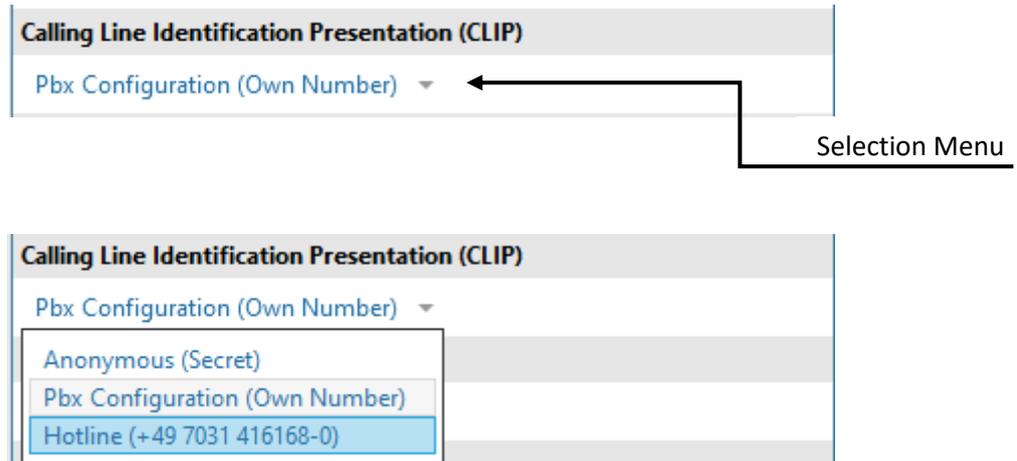
Click on this icon:  and choose the remote extension line.



The deposited mobile phone rings now, accept the call here, to carry on the conversation on this device.

Displayed Phone Number (CLIP)

Depending on the configuration on the c2d5 server, users have the option to change the extern displayed phone number on the **Home Tab**. The rights to do this also are set on the c2d5 server. Different profiles can be created.



Following options can be available:

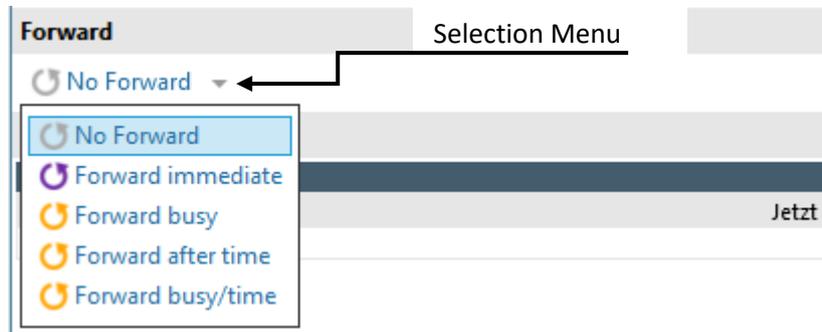
Anonymous (Secret) No phone number is transmitted.

Pbx Configuration (Own Number) The number configured in the phone system is transmitted. Standard is the own phone number.

Hotline (+49 7031 416168-0) Example for a phone number configured on the c2d5 server.

Call Forward

A call forward can be set in the **Home Tab**. To set a call forwarding, the user must not be logged in as a call center agent. Following call forward options are available:



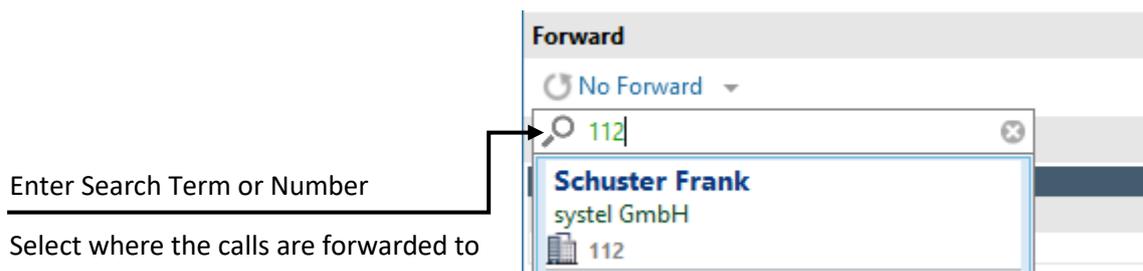
No Forward Calls will not be forwarded.

Forward immediate Calls will be forwarded immediately.

Forward busy Calls will be forwarded when the line is busy.

Forward after time Calls will be forwarded after a certain time. The time is configured on the telephone system.

Forward busy/time Calls will be forwarded after a certain time and when the line is busy.



If the call forward is active, you can see it in the red line on the top of the **Main Window**. To deactivate it, click on the cross or set the call forward to “no forward” in the **Home Tab**.



Calendar

In the **Calendar** you can see the ©Outlook appointments. This function is configured on the c2d5 server. Depending on the setting the appointments of the next 3, 5, or 7 days are displayed.



The current or next appointment is also displayed in the **Team Tab** and for team members visible.

Example:



If the mouse cursor is moved over the **Calendar Icon**  all appointments of the next 3, 5, or 7 days, depending on the configuration on the c2d5 server, are displayed.

Example:



Contacts

Overview

The screenshot shows the 'Contacts' overview page. At the top, there is a navigation bar with icons for home, contacts, search, and other functions. Below this is a toolbar with icons for favorites, filter, and view, along with a dropdown arrow and the text '633/633'. The main area displays a list of contacts, each with a star icon, a group icon, and a phone icon. The contacts listed are: Schuster GSM (systemel GmbH, 6412), Schuster IDS Frank (systemel GmbH, 212), Schuster SIP (systemel GmbH, 312), Schuster SIP2 (89114, schuster_sip2@systel.de), and Schuster Stefanie (116, 89116, s.schuster@systel.de). To the right of the list is an alphabetical index from A to Z, with the letter 'S' highlighted in blue. A red vertical bar is next to 'Schuster SIP2' and a green vertical bar is next to 'Schuster Stefanie'. Annotations with arrows point to various elements: 'Contacts Tab' points to the contacts icon in the top bar; 'Display Options' points to the toolbar icons; 'Contacts List' points to the contact entries; 'Account Displayed/Total' points to '633/633'; 'Direct Selection First Sign' points to the highlighted 'S' in the index.

Display Options

Overview

This close-up shows the toolbar area. It contains a star icon (Favorites), a filter icon, a view icon, and a dropdown arrow. The text '0/633' is displayed on the right. Annotations with arrows point to: 'Favorites' pointing to the star icon; 'Filter' pointing to the filter icon; 'View' pointing to the view icon; and 'Group' pointing to the dropdown arrow.

Favorites

Change the selection with clicking on the star:

★ **Not selected**

All contacts are displayed.

★ **selected**

Only favorites are displayed.

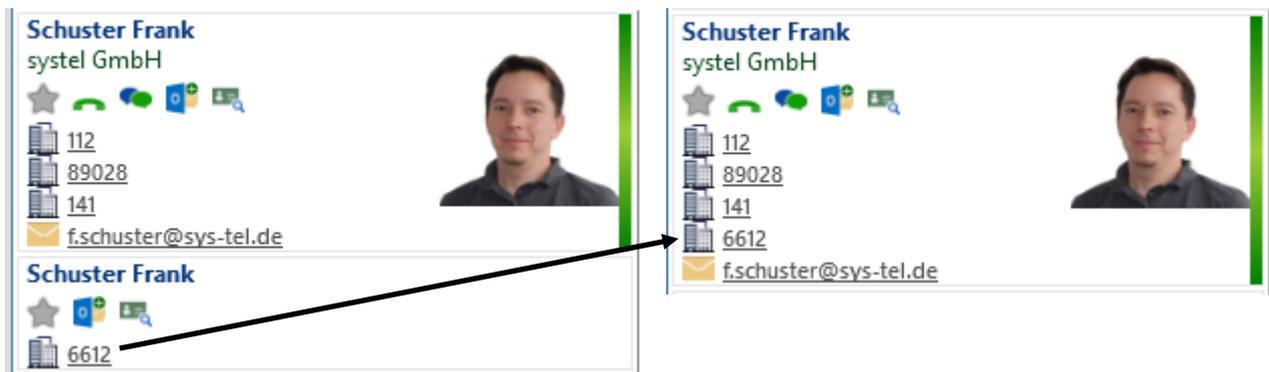
Group

Contacts with the same name, which are found in several address books, can be grouped to one entry. By clicking on the **Grouping Icon**  this is activated/deactivated.

Example:

 **not grouped**

 **grouped**



Filter

By clicking on the **Filter Icon**,  a menu opens to choose the address books from which the contacts should be displayed.

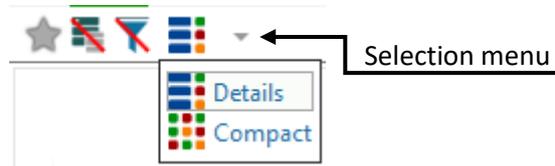


When the filter is active, the icon looks like this: 

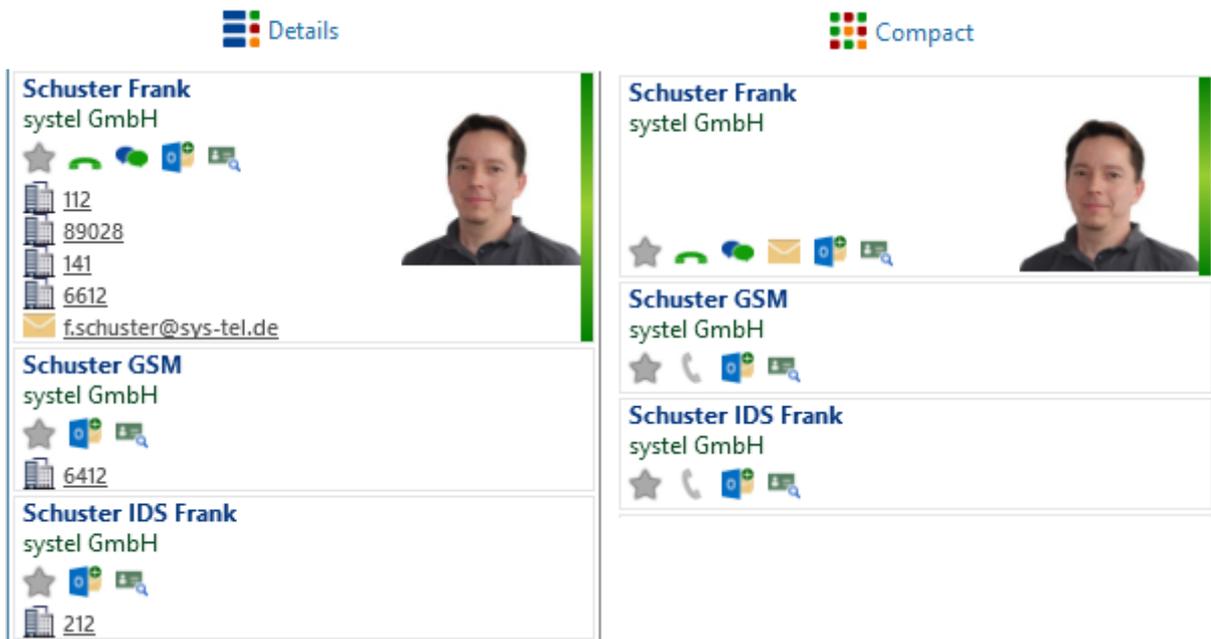
These databases are supported: ©Outlook, ODBC, ©Das Telefonbuch, LDAP, ©IBM Lotus Notes, Open Touch, OXE Enterprise

View

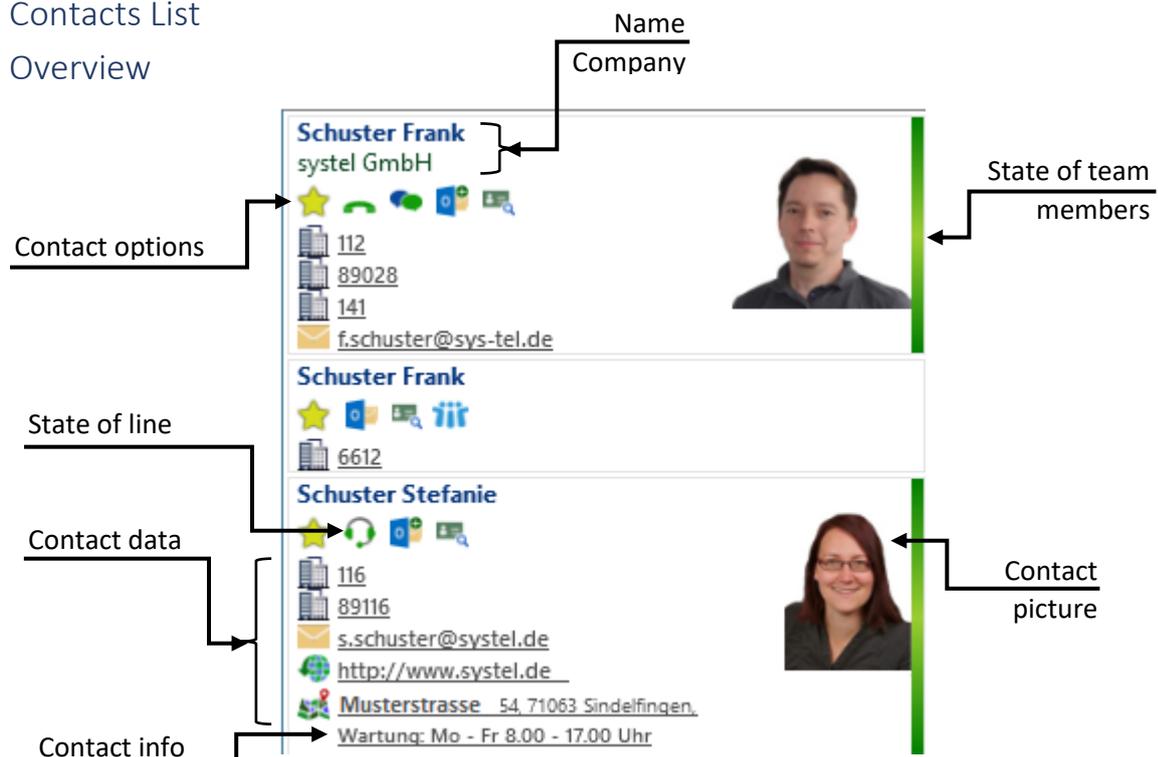
Die representation of the view of the **Contacts Tab** can be detailed or compact.



Example:



Contacts List Overview



Contact Data

Contacts can have following data:

 Telephone number

 E-Mail address

 Web address

 Address

By clicking on the telephone number, the contact is called immediately.

By clicking on the e-mail address a new email to the contact is opened in the e-mail program.

By clicking on the web address the internet page of the contact will be opened in the browser.

By clicking on the address of the contact ©Google Maps will be opened in the browser and a route to the contact can be planned. The **Address Icon** can be configured on the c2d5 server.

Contact Info

Contact entries can have further information as text. These can be copied in the clipboard by clicking on the text. For example: „Maintenance: Mo – Fr 8.00AM – 17.00PM“ or „Customer number 1234“

State of the Line

 Active line free  Active line busy  Out of order
 Call Center Agent free  Call Center Agent busy  CC Agent out of order

Picture of Contact

At team members the profile picture is displayed. At other contacts the pictures can be stored in the database, for example company logos.

Contact Options

By clicking on the icon:

-  /  Remove from favorites / add to favorites
-  Open @Lotus Notes business card
-  Open @Outlook contact
-  Make an @Outlook contact
-  Open contact details

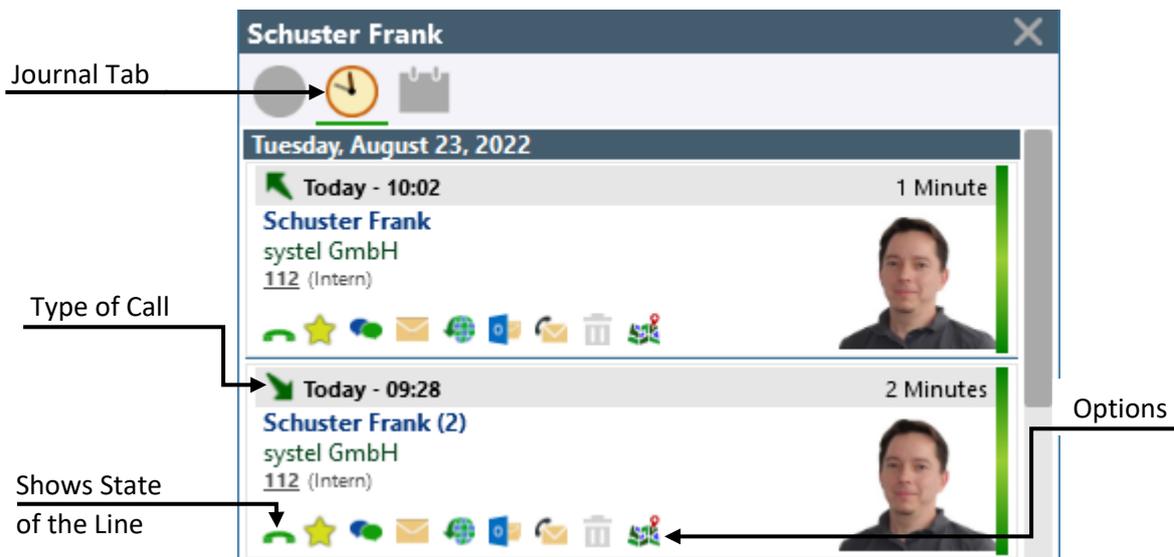
Contact Details

The **Contact Details** show further information:



Calling List/Journal

If calls were made with this contact, a **Journal Tab** is available in the contact details. Here you can see a list with calls made with this contact. Company intern missed calls, while the user was busy, are not registered.



The different types of calls are displayed like this:

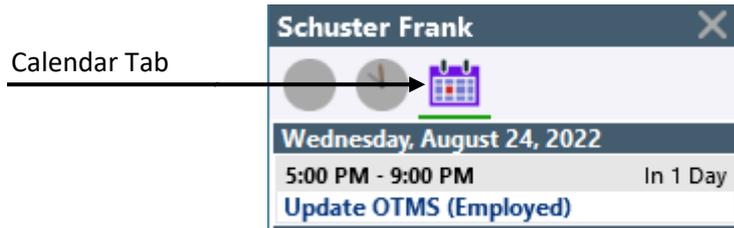
-  answered outgoing
-  unanswered outgoing
-  answered incoming
-  unanswered incoming
-  conference

Options

See chapter **Journal-> Contact Options**

Calendar

At team members the **Calendar Tab** is available. Here you can see the @Outlook appointments of the next 3, 5, or 7 days of the contact. Depending on the configuration of the c2d5 server.



Journal

In this list made calls, answered calls, and missed calls are displayed. Intern of the company missed calls are not displayed.

Overview

Journal Tab

List Options

Call Info

Contact Options

Telephone Number

Amount of Calls Displayed / Total

169/222

Today - 09:35 2 Seconds

Schuster Frank
systel GmbH
112 (Intern)
Busy

Monday, June 20, 2022

Yesterday - 09:30 24 Minutes

Schuster Frank
systel GmbH
112 (Intern)
+49 711 (Stuttgart)
Conference

Yesterday - 07:58 1 Minute

Schuster Frank
systel GmbH
112 (Intern)

Telephone Number

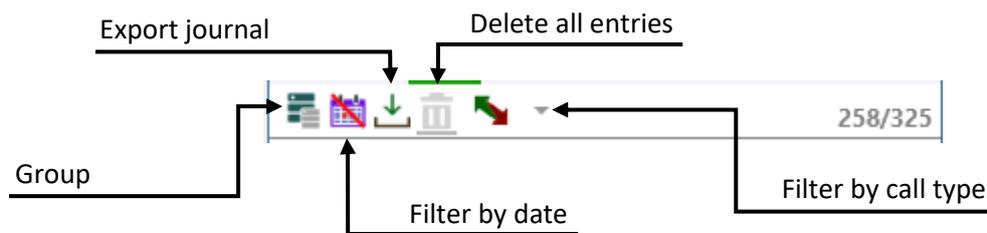
Telephone numbers in the **Journal** can be called directly by clicking on them. To copy the number, click with the right mouse button on them.

Call Info

Call info like call type, date, time, and duration of the call are displayed here. The different call types are displayed like this:



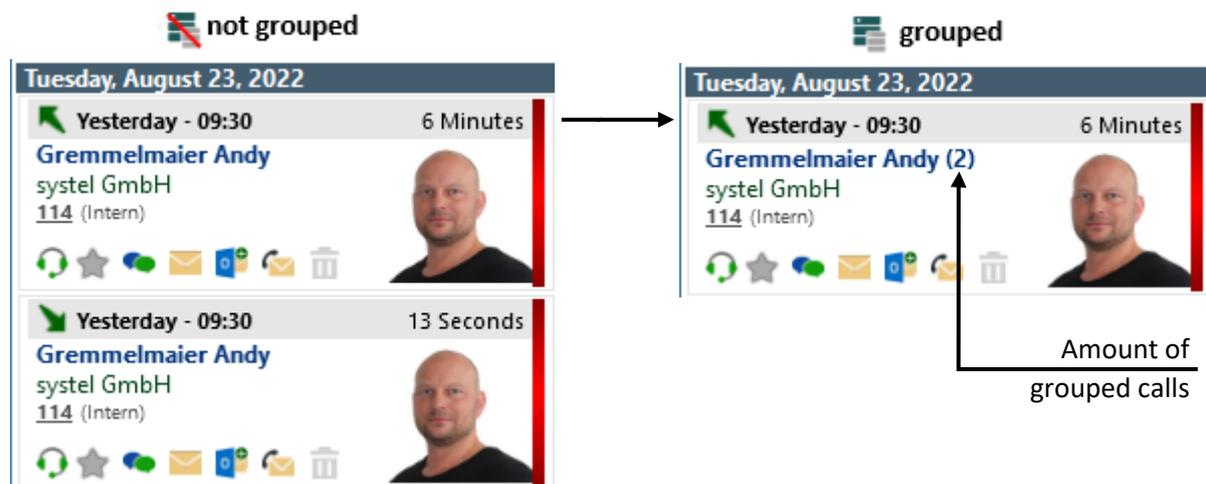
Journal Options



Group

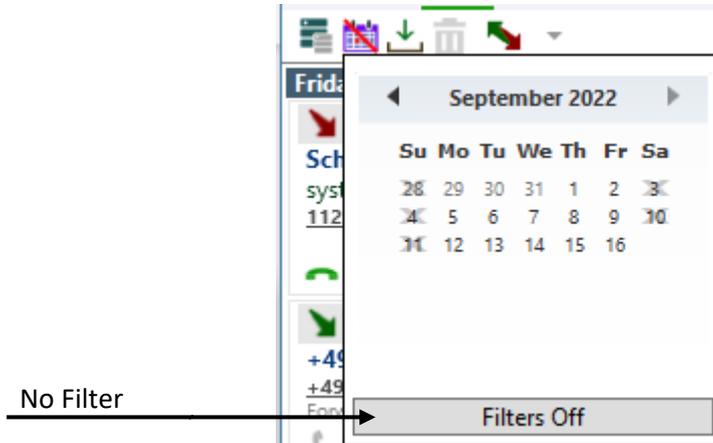
Clicking on the **Grouping Icon** calls with the same contact are grouped and displayed as one entry. The info of the last call is shown, and the number of calls is displayed after the name.

Example:



Filter by Date

By clicking on the **Calendar Icon**,  the calendar will open to filter the journal by date. Choose the date which calls you want to be displayed. To deactivate the filter, click on the **Filters Off Button**.



If this filter is active, the icon looks like this: 

Export Journal

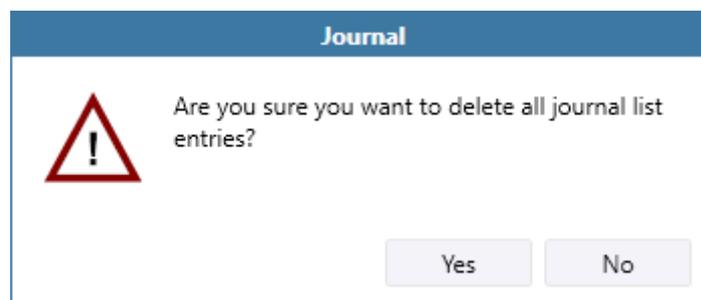
By clicking on this icon,  the journal can be exported as a .txt-file.

Example:

Date	Time	Direction	Number	Name	Company	Duration
6/21/2022	9:35:13 AM	Unanswered outgoing	112	Schuster Frank	systemel GmbH	2 Seconds
6/20/2022	9:30:54 AM	Conference	112	Schuster Frank	systemel GmbH	24 Minutes
6/20/2022	7:58:36 AM	Answered outgoing	112	Schuster Frank	systemel GmbH	1 Minute
6/17/2022	10:37:50 AM	Answered outgoing	112	Schuster Frank	systemel GmbH	4 Minutes

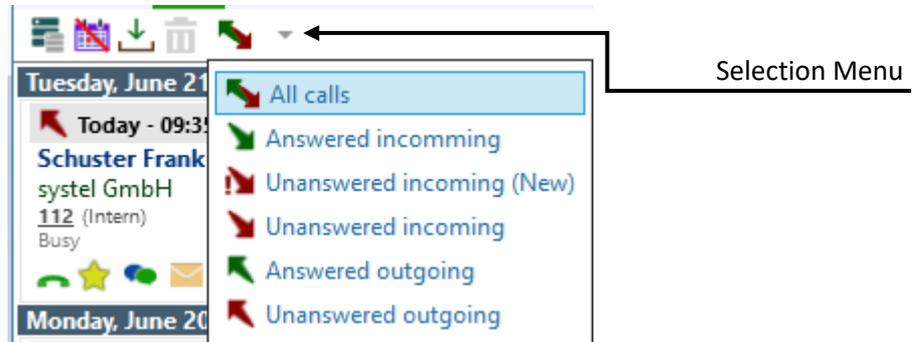
Delete all Journal Entries

By clicking on the **Trashcan Icon**,  the complete calling list will be deleted. A security request follows:



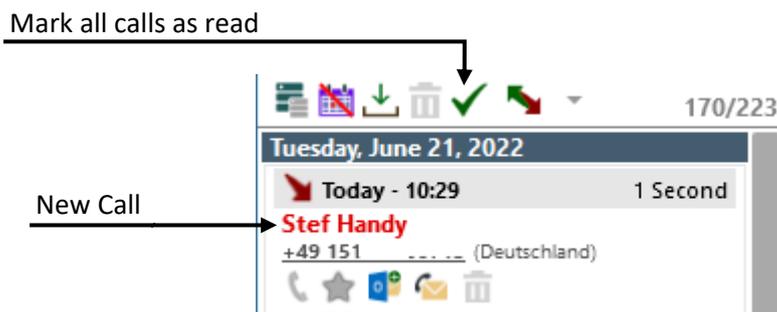
Filter by Call Type

The **Journal** can be filtered by call type. Following call types can be selected:



Unanswered incoming (New)

Unanswered incoming new calls that haven't been read yet (new) are marked red in the **Journal**. Clicking on the green checkmark  marks them as read.



The amount of new missed calls is displayed in the **Journal Tab Icon**:



Contact Options

By clicking on these icons, following options are selected:

 Show all telephone numbers, these can be called by click
(team members  / call center )

 /  Remove from favorites / add to favorites

 Chat – only available for team members

 Write e-Mail

 Make @Outlook contact

 Open @Outlook contact

 Open @Lotus Notes business card

 Show websites. By clicking on the link, they will be opened in your browser.

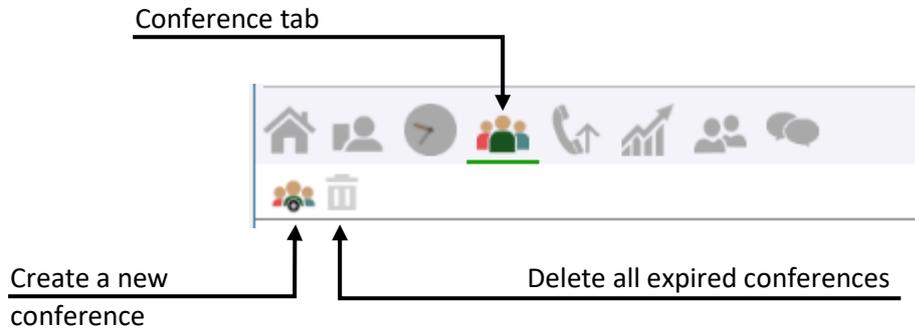
 Make a please call back e-mail. For more see chapter **Call, Accept, and Hang up -> Options -> Please Call Back E-mail**

 Delete single journal entry

 Open @Google Maps in browser, to plan a route to the address of the contact.

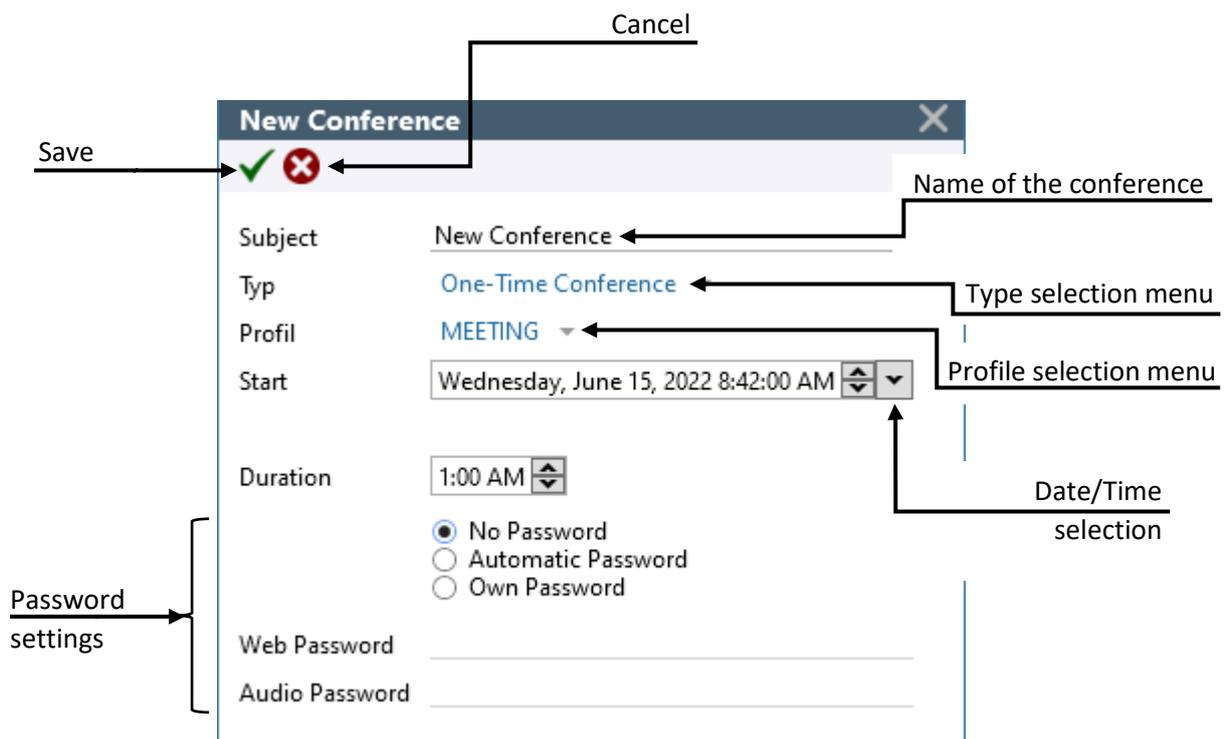
Conference

Overview



Create a New Conference

Clicking on this icon  opens a window to create a new conference.



Enter the conference name in the subject input box:

Subject

Choose the conference type:

Typ One-Time Conference ▾ ← Type selection menu

Profil

Start

One-Time Conference
 Recurring Conference
 Reservationless Conference

:00 AM ▴ ▾ ▾

One-Time Conference Is taking place once

Start Wednesday, June 15, 2022 8:42:00 AM ▴ ▾ ▾

Recurring Conference Daily, weekly, or monthly repeating

Start Wednesday, June 15, 2022 8:42:00 AM ▴ ▾ ▾

End Friday, July 15, 2022 8:42:00 AM ▴ ▾ ▾

Daily
 Weekly
 Monthly

Reservationless Conference This conference can stay up to six months. It is allowed to call in any time you wish with the same login data.

Start Wednesday, June 15, 2022 8:42:00 AM ▴ ▾ ▾

End Friday, July 15, 2022 8:42:00 AM ▴ ▾ ▾

Select duration of conference: Duration 1:00 AM ▴ ▾

(Except for "Reservationless Conference")

Choose conference type:

The right to choose different profile types is configured on the c2d5 server.

Profil MEETING ▾ ← Selection menu profile

Start

Duration

MEETING
 WEBINAR
 TRAINING
 CONFCALL

MEETING The profile corresponds to a standard meeting. The main characteristics of such profile are:

- Callers names are recorded and announced when joining the conference.
- No limitations on conversation between members (except the ones specific to leader / participant role).
- All members can control their audio (mute / unmute ...).
- All members can join on their preferred way (audio only, web only, audio and web).

WEBINAR This profile is designed for a webinar session. The main characteristics of such profile are:

- Only leaders can interact with participants. Participants can not see each other.
- Participants join the audio conference as muted and can not change it.
- The audio conference will end as soon as the last leader leaves.
- Callers names are not recorded, nor announced (not even join tones).

CONFCALL This profile corresponds to an audio only conference session.

TRAINING This profile is designed for a training session. The main characteristics of such profile are:

- The presentation is led by the owner (the 'trainer').
- Trainees join the audio conference as muted, but they can not change it.
- The audio conference will end as soon as the last leader leaves.
- Callers names are recorded and announced (no join tones).

Set a password

No Password No password needed to participate conference

Automatic Password A password is set from click2dial5

Web Passwort ●●●●●●●●

Audio Passwort ●●●●●●●●

Own Password Set an own password for the conference

Web Passwort ●●●●●●●●

Audio Passwort ●●●●●●●●

Save the conference by clicking on the green checkmark:



Created conferences appear in the list:

Invite Participants

To invite participants by e-mail, click on the envelope or create an @Outlook appointment by clicking on the clock.

The invitations can have these types:

- Invitation Audio (Participants)
- Invitation Web (Participants)
- Invitation Web & Audio (Participants)
- Invitation Audio (Leader)
- Invitation Web (Leader)
- Invitation Web & Audio (Leader)

Audio – telephone call conference

Web – participation by website

The invited participants receive via e-mail or @Outlook appointment the access data. These are configured on the c2d5 server.

Example:

Conference 'New Conference'

Start: 6/21/2022 12:18:00 PM
End: 6/21/2022 1:18:00 PM
Duration: 1 Hour

Weblink
<https://conference.sys-tel.de/call/0188543>

Web Password
2Kv7Kb8?

Participate with one click on your smartphone:
[+4970314161688870](tel:+4970314161688870)

Audio Password
7000111

Conference Details

To open the **Conference Details**, click on this icon: 

Name of the conference

New Conference ✕

Info Tab   

Subject	New Conference
Profile	MEETING
Start	6/21/2022 12:18:00 PM
End	6/21/2022 1:18:00 PM
Duration	1 Hour
Recurrence	One-Time Conference
Weblink	https://conference.sys-tel.de/call/0188543
Leader Access Code	0127080
Participant Access Code	0188543
Web Password	2Ky7Kb8?
Audio Password	78229444

Add Participants

In the **Users Tab**  of the **Conference Details** participants can be added to the conference per drag and drop from the **Contacts List**. Also, you can select a participant to be the conference leader. You can search in the **Contacts List** for names. To delete participants, click on the **Trashcan Icon**.

Name of the conference

Integration CCD Dashboard ✕

Users Tab  

Users
You can drag and drop people from your contact list or Outlook.

Contacts

Name Search

Schuster Frank
systemel GmbH
f.schuster@sys-tel.de

Conference participants

Participant

Schuster Frank
systemel GmbH
f.schuster@sys-tel.de

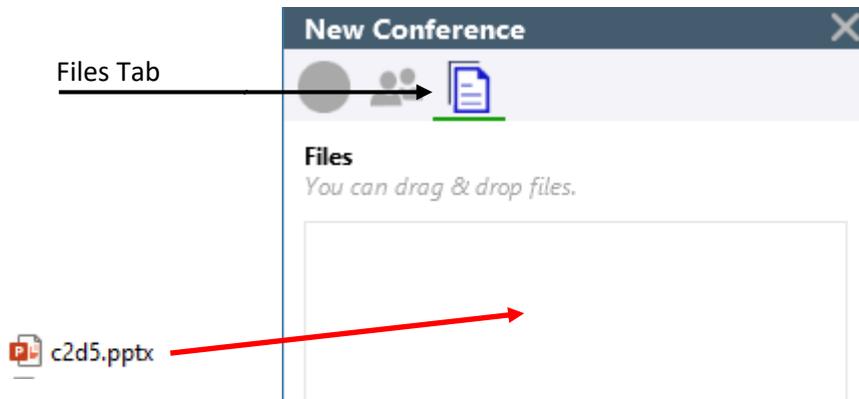



Delete participant

Select to be conference leader

Files

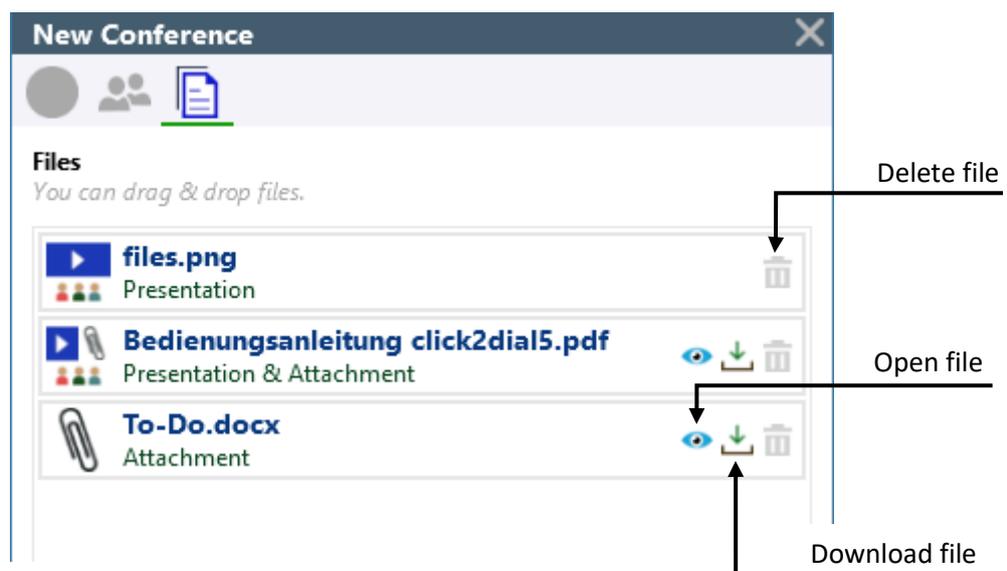
At the **Files Tab**  of the **Conference Details** files can be added to conferences by drag and drop.



A popup appears to choose how the files are provided to the conference.



Uploaded files appear in the list.



Participate Conference

To participate click on the icons of the conference in the list of the c2d5 **Conference Tab**:

 Participate by phone  start web conference

Or follow the link in the e-mail invitation to start the web conference. To participate by phone, call the number saying in the invitation.

The conference leader has its own access code. You can see it in the **Conference Details**.

Example:

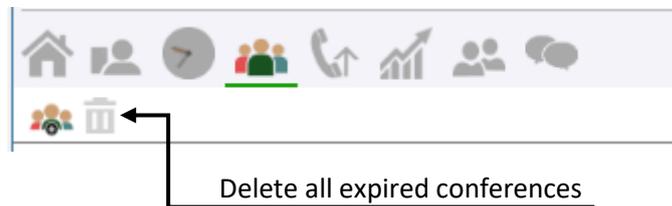
Leader Access Code 0161310

Edit Conference

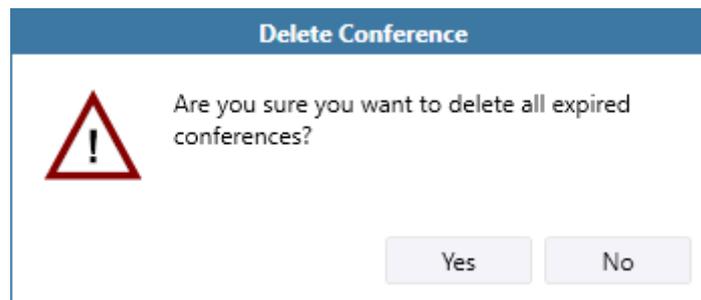
To change conferences afterwards, click on the **Pencil Icon**: 

Delete Conference

To delete all expired conferences, click on the **Trashcan Icon** in the **Conference Tab**: 



A security request follows:



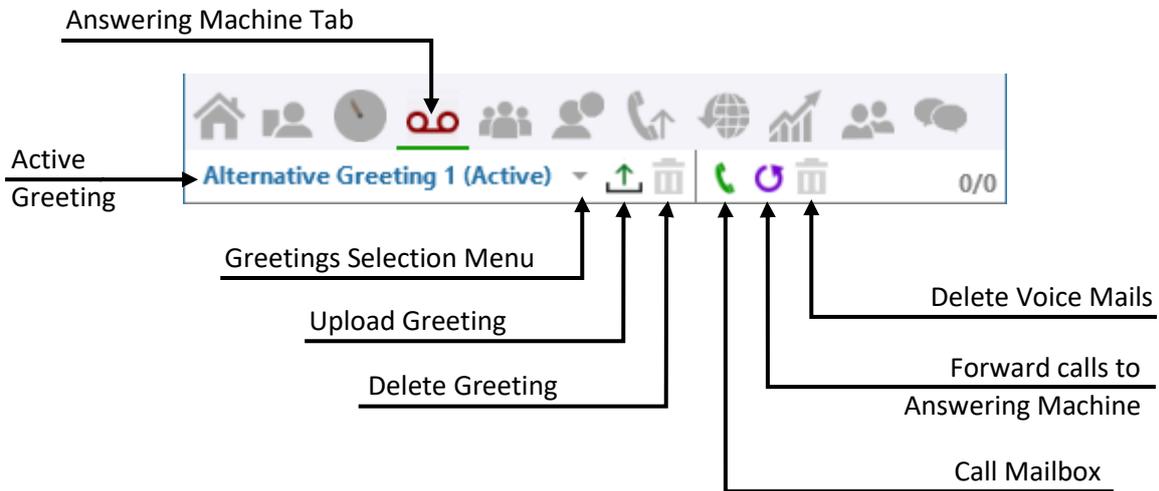
To delete single conferences, click on the **Trashcan Icon**  of the single conference in the list. A security request follows.



Answering Machine

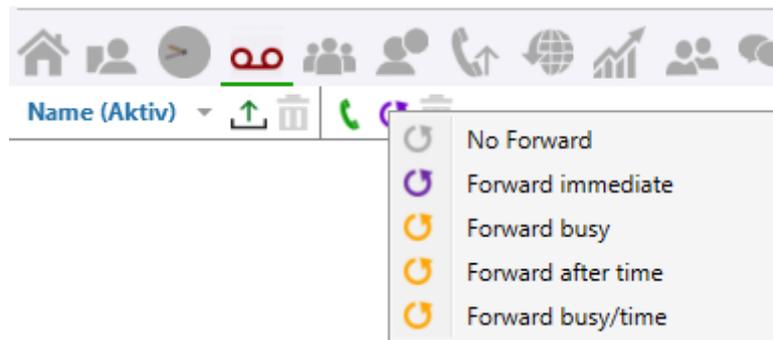
If the user has an answering machine, it can be handled with this tab.

Overview



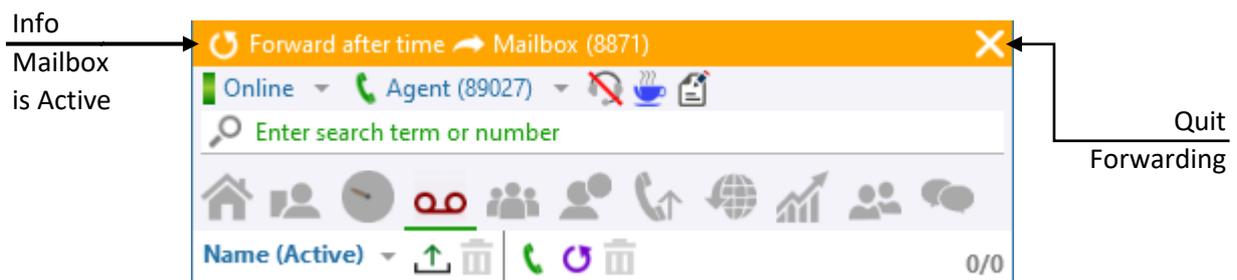
Activate Answering Machine

To activate the answering machine a call forward to the answering machine must be set. Click on the **Call Forward Icon**  and choose when the call forward is active.



Otherwise set a call forward in the **Home Tab** to the number of the answering machine. See chapter **Tabs-> Home-> Call Forward**.

If a call forward to the answering machine is active, you can see a bar in the **Main Window**.

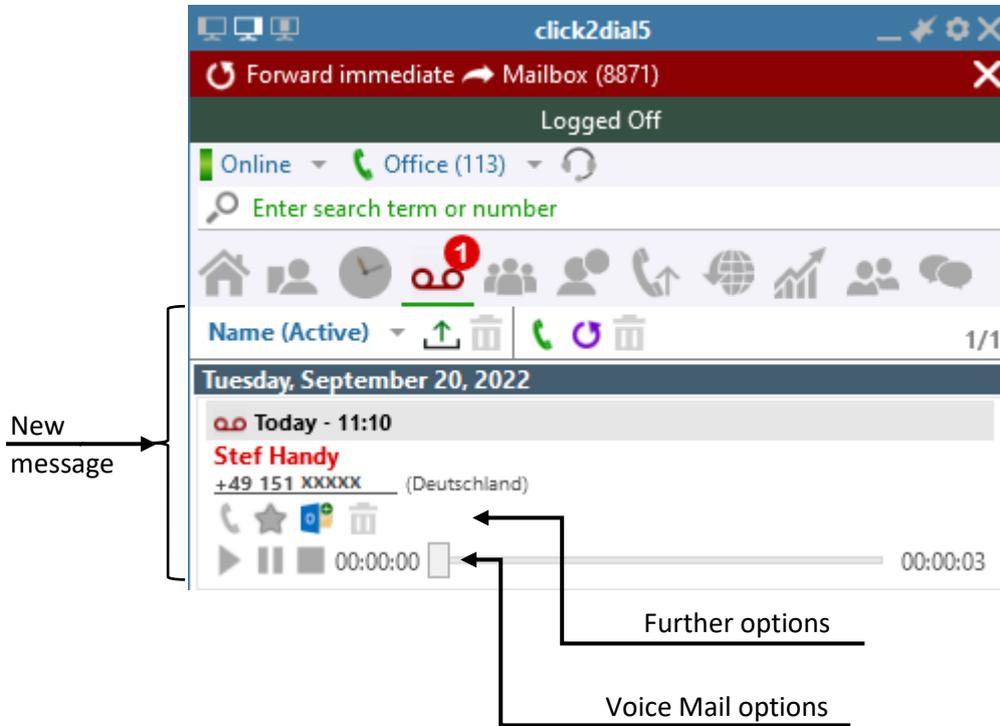


Voice Mails

The amount of new voice mails is shown in the **Answering Machine Icon** of the tab.



Recorded calls are in the list as a voice mail from the user itself.



Voice Mail Options

Following possibilities are started by clicking on the corresponding icons:

- ▶ A call to the answering machine follows to play the message.
- || Pause playing message.
- Stop playing message.

While playing a message it can be fast forwarded or rewinded by holding and drawing the slider with the mouse.

Further Options

By clicking on the corresponding icons:

- ★ / ☆ Add/remove from favorites
- 📄 Open @Outlook business card
- 🗑️ Delete Voice Mail
- 📞 / 🔄 Call
- 👤 Open @Lotus Notes business card
- 📄 Create an @Outlook contact
- 💬 Chat (only possible with c2d5 user)
- ✉️ Write e-mail

Upload/Change/Delete Greetings

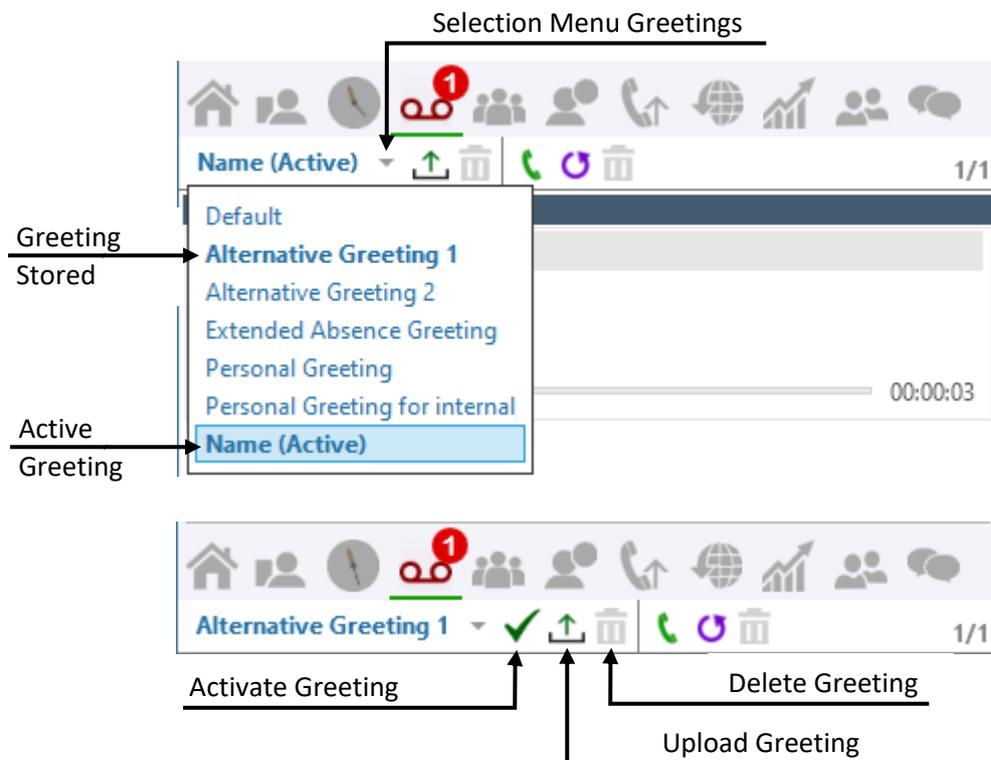
If there is no greeting uploaded the caller hears the standard greeting from the telephone system. Then the client shows you that the **Default Greeting** is active.



As standard the answering machine asks you to record your name when it is installed. If this is done the active greeting is the **Name Greeting**.



On the answering machine you can record several voicemail greetings. **Alternative Greeting 1+2**, **Extended Absence Greeting**, **Personal Greeting** and **Personal Greeting for Internal** can be selected. If an announcement is stored behind a greeting, the font of it is bold. To choose a greeting click on it and activate it by clicking the green checkmark. ✓ Default can only be chosen if there are no other greetings stored.



To upload a voicemail greeting, it must be in .wav format. Choose the greeting und click on this icon  to choose the file which you want to upload.

By clicking on the **Trashcan Icon**  uploaded voicemail greetings are deleted.

Team

Teams are configured on the c2d5 server. Single c2d5 users can be added to several teams. For each team there is an own tab.

Overview

The screenshot shows the 'Team Overview' window. At the top, there is a 'Team Tab' with a group of people icon. Below it is a 'Team Note' field containing 'Note for your team' and an 'Undock Window' button. A toolbar with various icons is visible. The main area is a 'Team List' showing three team members:

- Schuster Frank**: 5:00 PM-9:00 PM Update OTMS (Employed), Online, 112 Idle. Status indicator is green.
- Schuster Stefanie**: 8/25/2022 Frei Überstunden (Absent), Online, 113 Idle / Logged ('02:52:24'). Status indicator is green.
- Gremmelmaier Andy**: 8/25/2022 Homeoffice (Free), Online, 114 Idle / Logged ('02:51:19'). Status indicator is green.

Annotations point to: 'Team Note', 'Team Options', 'Team Tabs', 'Team List', 'Online State', 'Undock Window', and 'Chapter: Main Window ->Status Indicator'.

Team Note

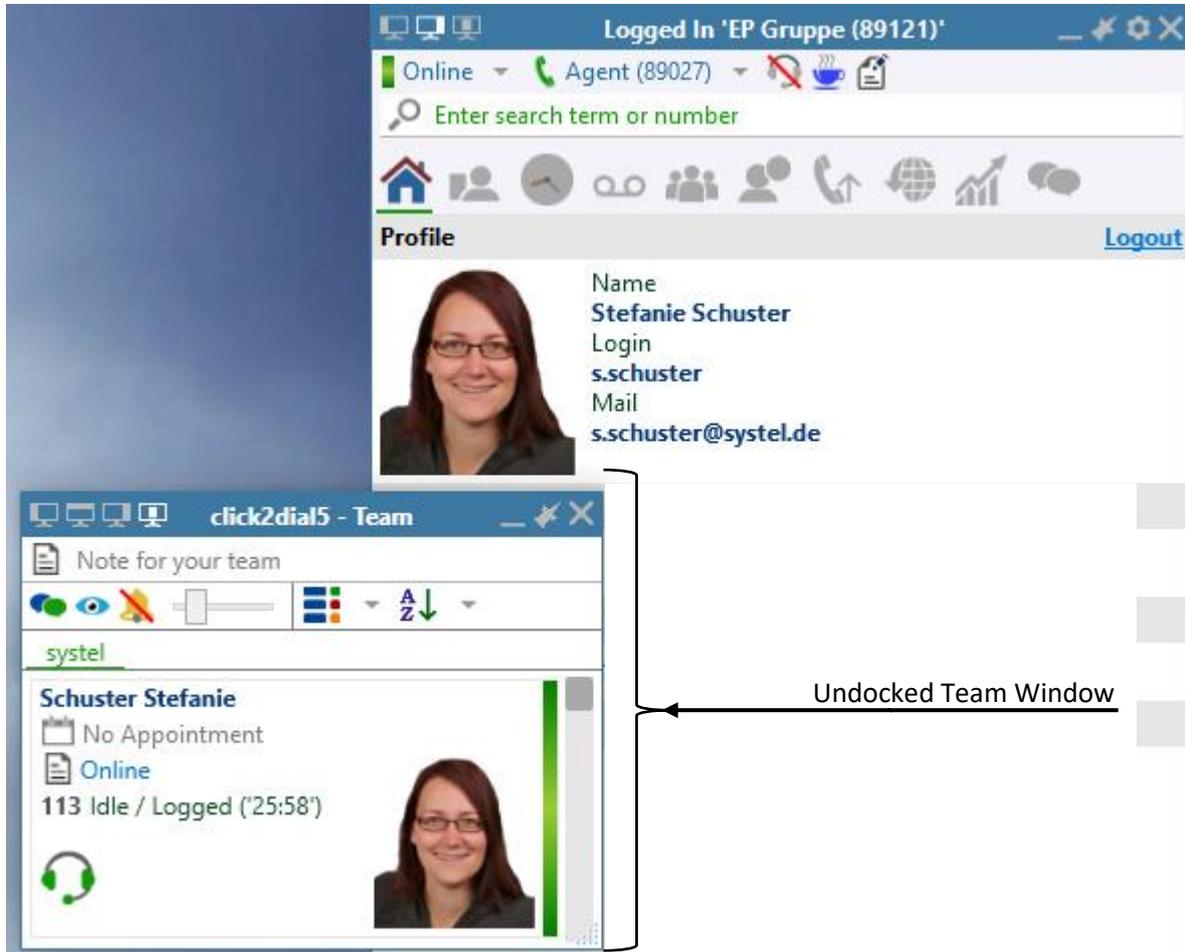
In the **Team Note** line you can write a short note for your team. This info appears instead of the online state. Entering is released with the enter button. To delete the note click on the cross .

Example:

The screenshot shows the 'Team Note' field with the text 'I am in a meeting till 11 O'Clock' and a 'Delete Team Note' button (cross icon). Below, the team member 'Schuster Stefanie' is shown with the same note displayed in her profile, replacing her online status. Her status is '113 Idle / Logged ('02:44:36')'.

Undock Team Window

Clicking on this icon  undocks the team window. Instead as a tab in the **Main Window** the **Team Window** is now in a separate window.

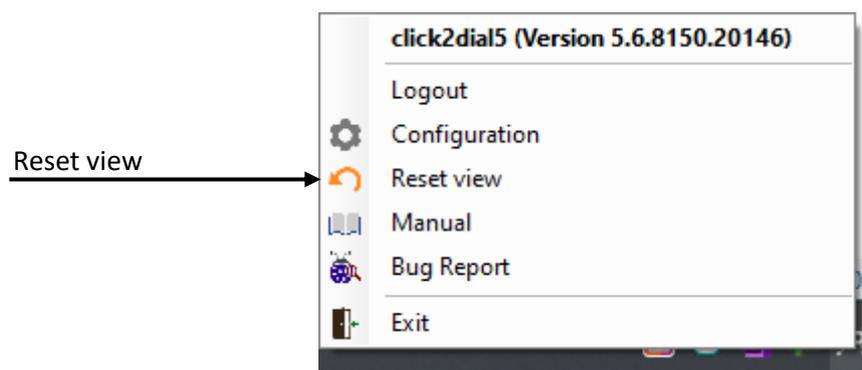


Next to the window options you already have in the **Main Window**, the **Team Window** can be docked to the upper top of the desktop by clicking on this icon. 

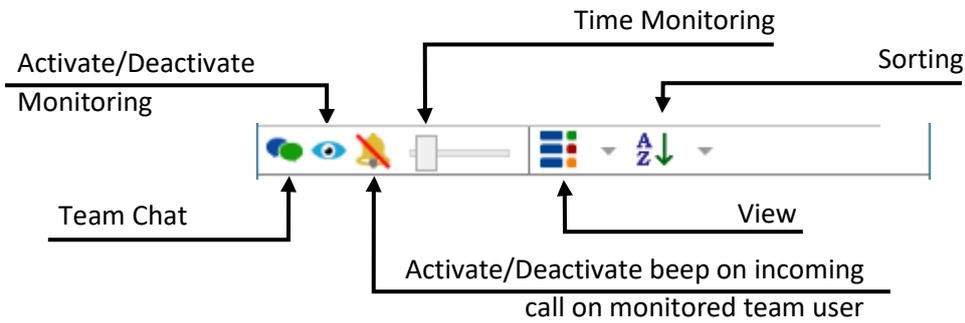
If the **Team Window** is closed  it will be a tab in the **Main Window** again.

The complete view can be reset to default. To do this click with the right mouse button on the **c2d5 Icon**  in the taskbar to reach the **Taskbar Menu** and choose **Reset view**.

Also see chapter **Taskbar Menu**.



Team Options

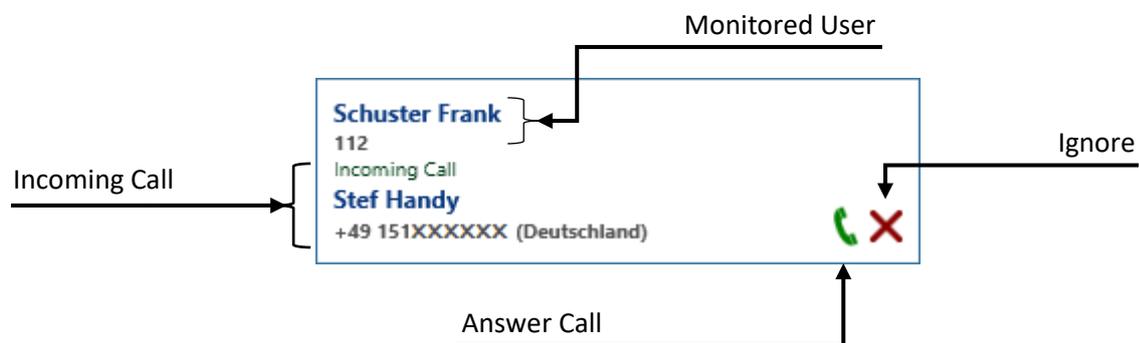


Monitoring

To monitor calls, click on this icon  at the team member. If the monitoring is active the icon looks like this: 



If the monitored user gets a call a popup appears on which the call can be answered:

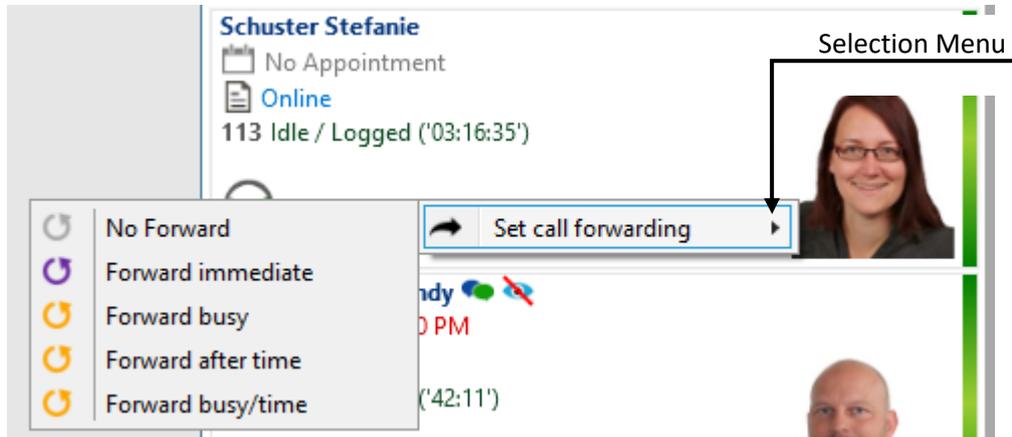


To activate/deactivate a beep sound, click on the **Bell Icon:**  /  (off/on)

To set the time after when the popup should appear, click on the slider,  and hold it to drag. The time can be adjusted between 0 and 30s.

Call Forward

By clicking with the right mouse button on a team member or yourself, you can set a call forward. Move the mouse cursor over the arrow to see the selection menu and choose the needed call forward option. Also see chapter **Tabs-> Home Tab-> Call Forward**.



There are following call forward options:

No Forward Calls are not forwarded.

Forward immediate Calls are forwarded immediately.

Forward busy Calls will be forwarded when the line is busy.

Forward after time Calls will be forwarded after a certain time. The time is configured on the telephone system.

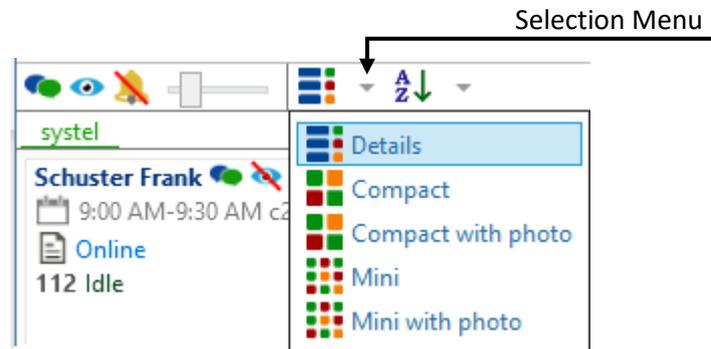
Forward busy/time Calls will be forwarded after a certain time and when the line is busy.

After choosing an option, a window opens. Enter a number or search term and choose where calls are forwarded to by clicking on the entry.

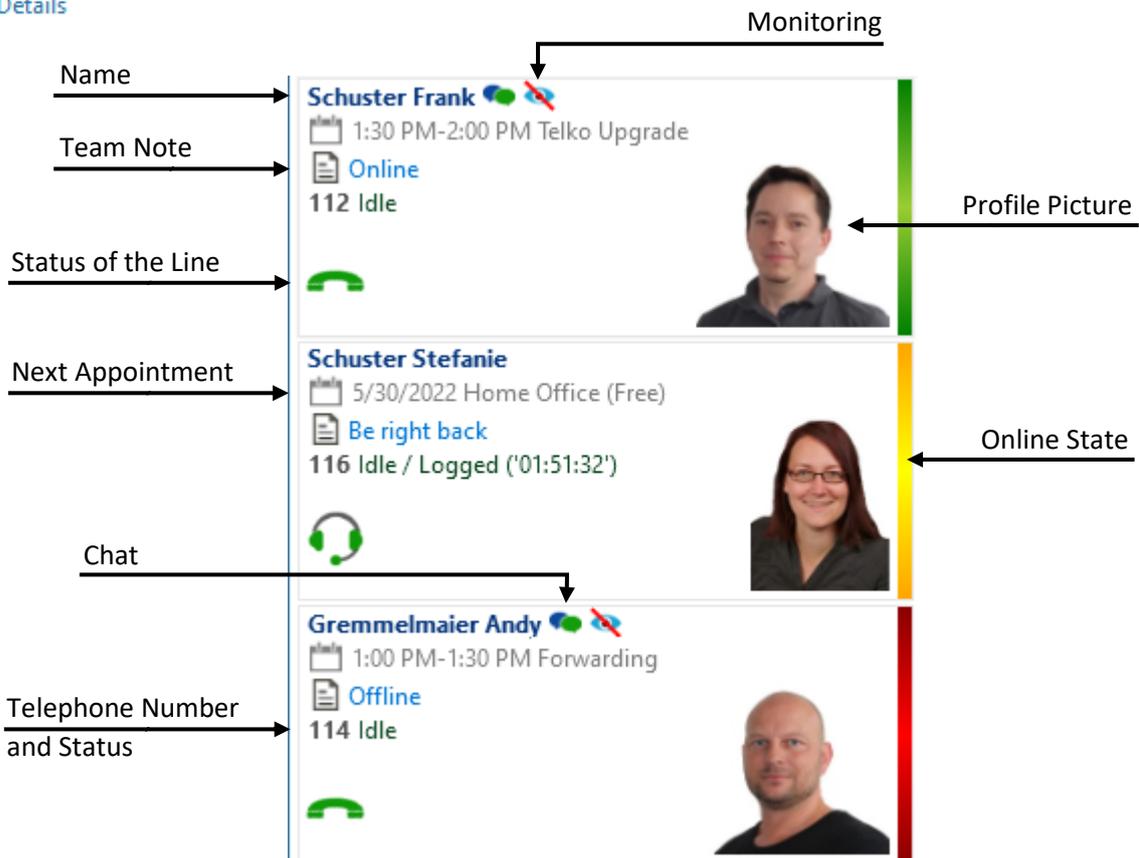


Team View

To display the team there are various options:



Examples:



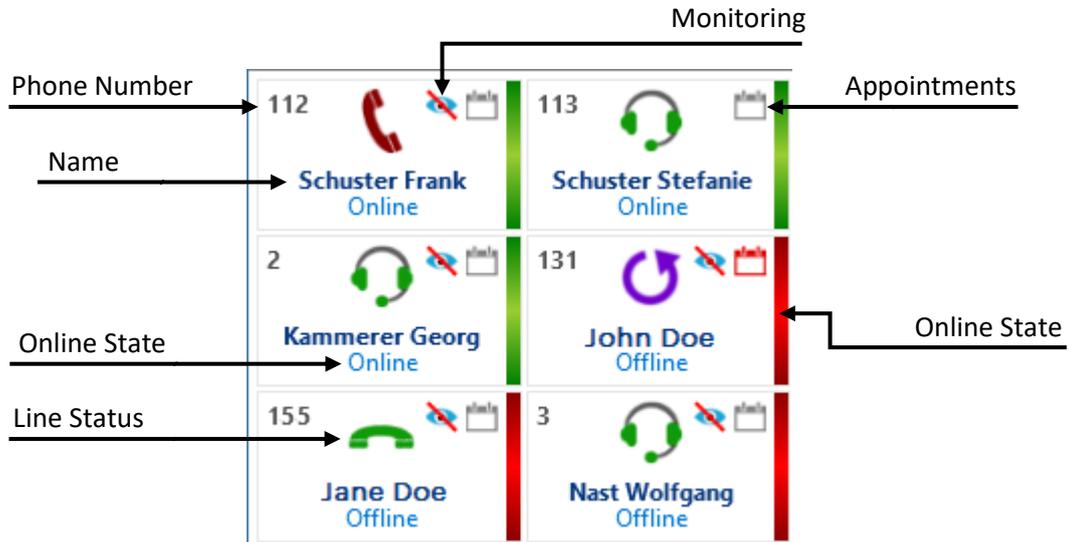
By double-clicking a team member or clicking on the **Line Status Icon** you start a call to this person.

The **Line Status** can have following appearance:



Appointments can be seen when the mouse cursor is moved over the **Calendar Icon**.

 Compact



 Compact with photo



 Mini

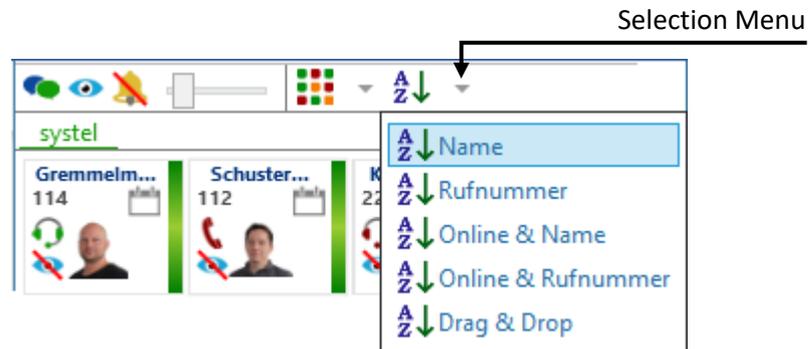


 Mini with photo



Sorting

These sorting how the team members are sequenced in the view are available:



A/Z ↓ Name Sorting names in alphabetical order.

A/Z ↓ Rufnummer Sorting phone number numerically.

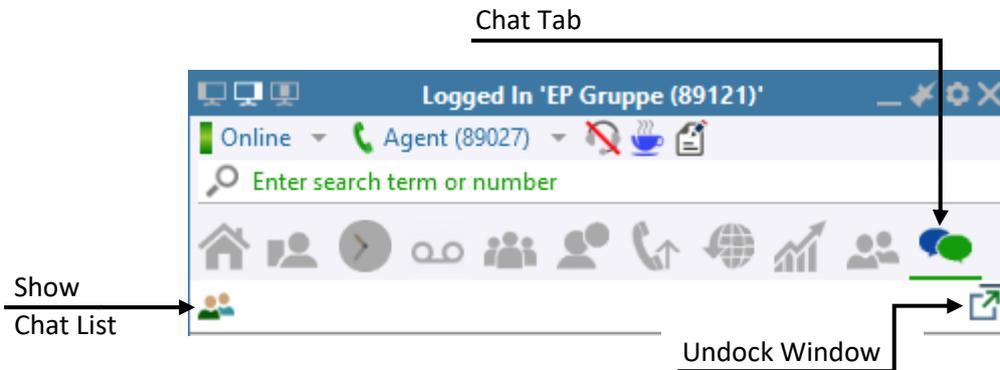
A/Z ↓ Online & Name Sorting by online status and name. Team members which are offline are shown in the bottom of the list. The names are sorted in alphabetical order in each online state.

A/Z ↓ Online & Rufnummer Sorting by online status and phone number. Team members which are offline are shown in the bottom of the list. The phone numbers are sorted in numerical order in each online state.

A/Z ↓ Drag & Drop The list can be sorted individually by drag & drop. Click on the team member and hold the mouse button to move the entry on a position you wish.

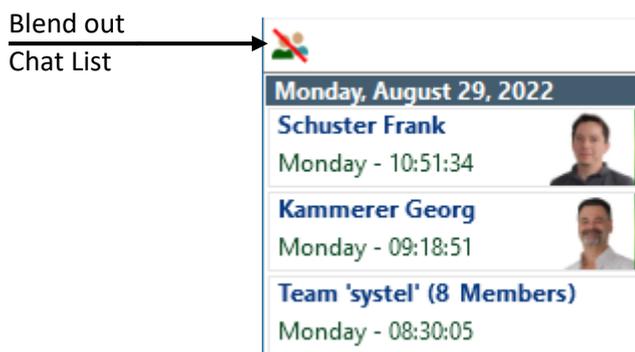
Chat

Overview

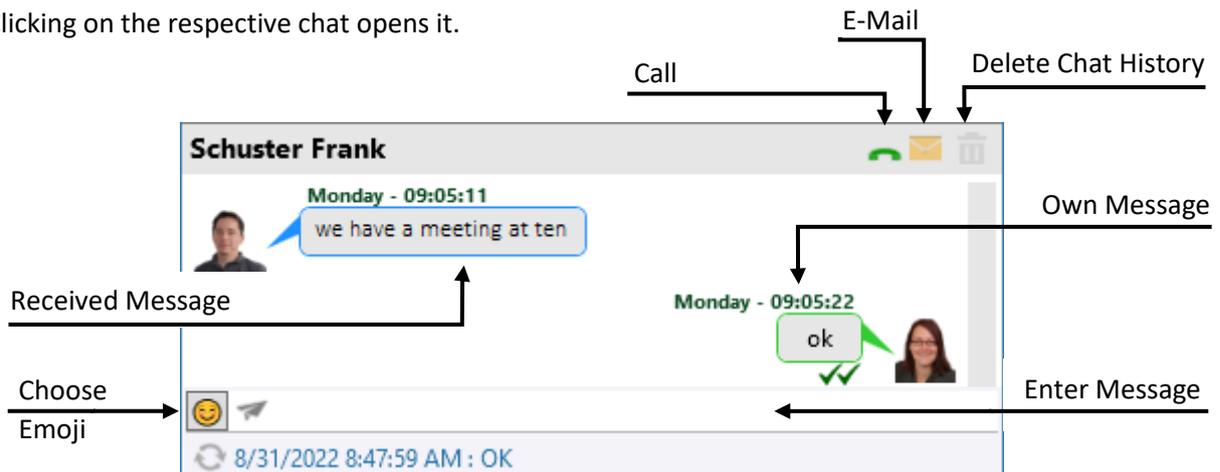


Clicking on the **Chat Tab Icon** opens the last chat.

In the **Chat List** are all existing chats.



Clicking on the respective chat opens it.



Own messages that the addressed person has received have a green checkmark. ✓ If the message is read, two green checkmarks ✓✓ can be seen under the message. To be registered as read, the addressed person must move with the mouse cursor over the message or switch to the corresponding chat window.

To start a chat, click on the **Chat Icon**  at c2d5 users in the **Contacts Tab** or the **Team Tab**.

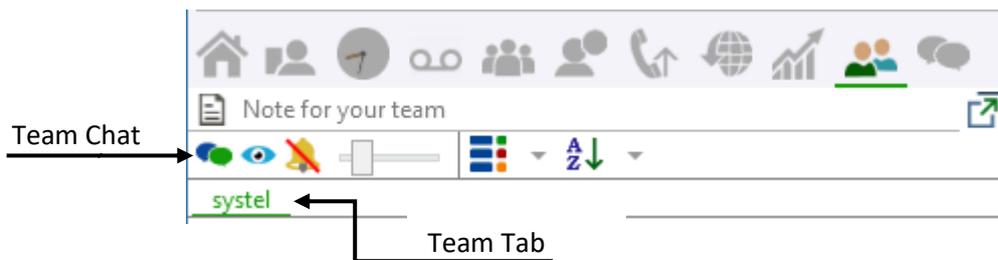
Example **Contacts Tab**:



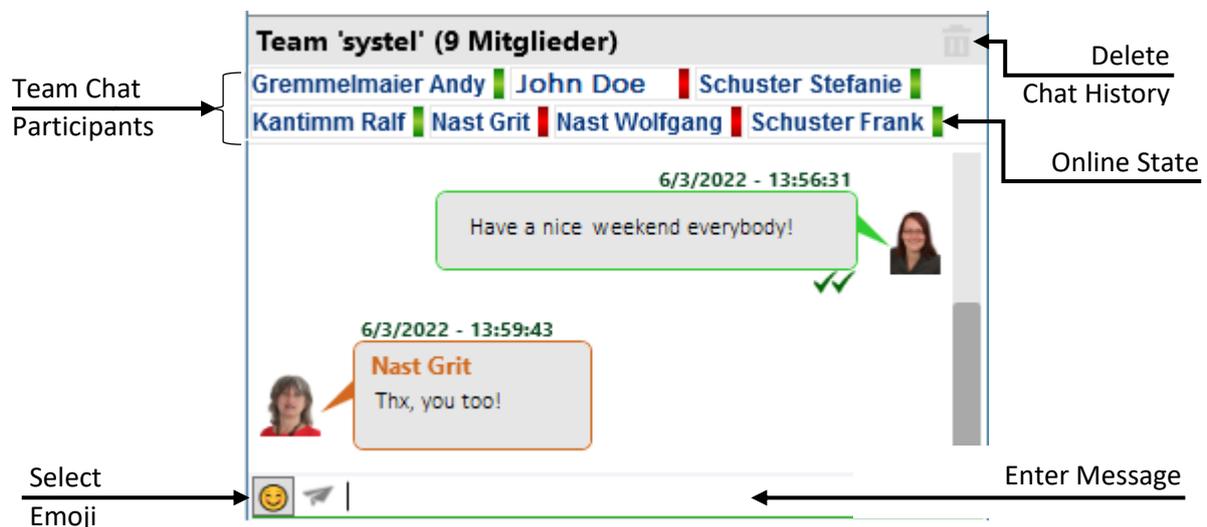
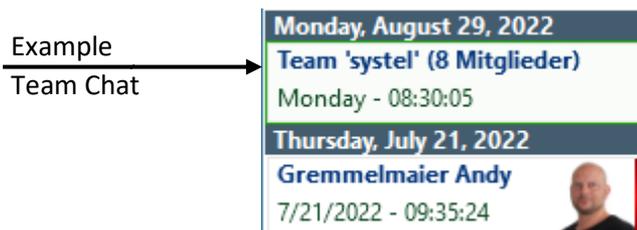
Team Chat

Each team has an own team chat.

To open the **Team Chat** window, click on the **Chat Icon**  in the corresponding **Team Tab**.

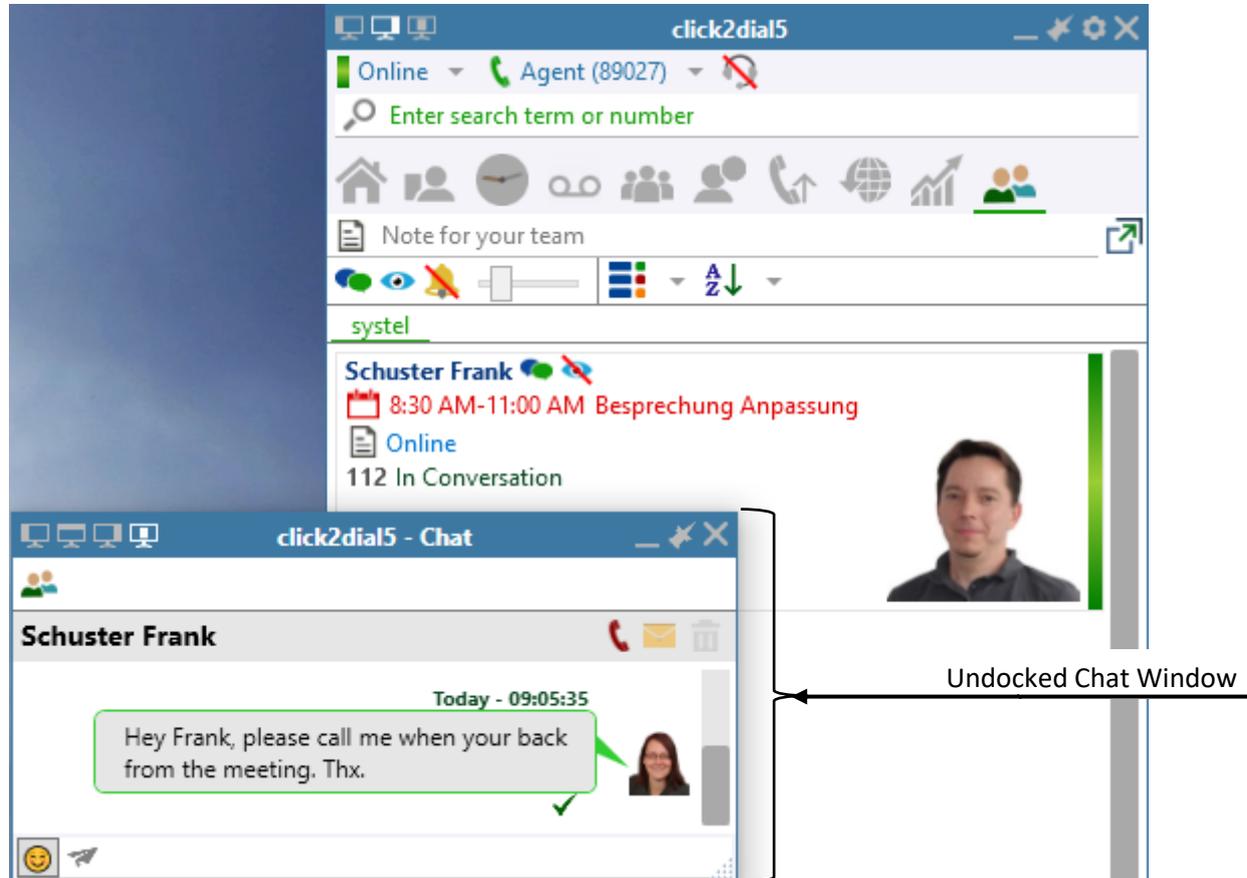


Or click on the **Team Chat** in the **Chat List**:



Undock Chat Window

Clicking on this icon  undocks the chat window. Instead as a tab in the **Main Window** the **Chat Window** is now in a separate window

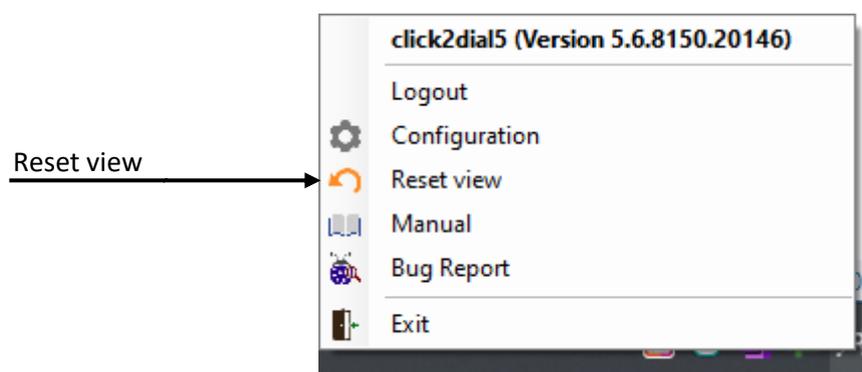


Next to the window options you already have in the **Main Window**, the **Chat Window** can be docked to the upper top of the desktop by clicking on this icon. 

If the **Chat Window** is closed  it will be a tab in the **Main Window** again.

The complete view can be reset to default. To do this click with the right mouse button on the **c2d5 Icon**  in the taskbar to reach the **Taskbar Menu** and choose **Reset view**.

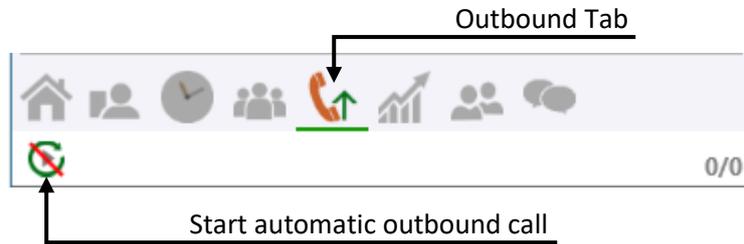
Also see chapter **Taskbar Menu**.



Outbound

This tab is configurable on the c2d5 server for call centers.

Overview

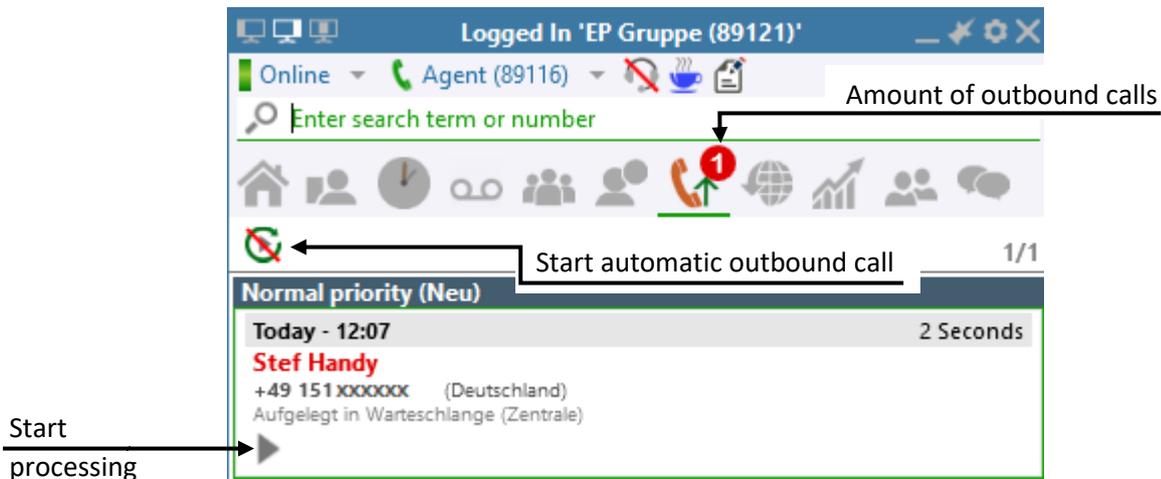


Outbound List

Call center calls, which are hung up while ringing or in the waiting queue, are listed here.

Also, there is the option to import contact lists to be called. The assignment of users to different lists can be done on the c2d5 server. Contact lists can come from ODBC databases, CCD of the PBX or from the IVR of the sys-Voice Gateway. If an ODBC database is used, predefined data can be written back to the database after hanging up the call. The results will be monthly summarized and saved as a CSV-file on the c2d5 server.

The next call can be started automatically or by hand.



Automatic Outbound Call

Clicking on this icon, , starts the automatic outbound call.

A countdown of 15s will start before the editing window opens.



When the editing window is closed the countdown starts again and a new editing window is opened.

To stop the automatic outbound calls, click on the icon again: 

Edit an Outbound Call

Example of an outbound call:

click2dial5

Name: Stef Handy

Info: In Processing (Schuster Stefanie)

Creation date: 6/14/2022 11:36:16 AM

Number: +49 151 xxxxxx

Start call

State: Successfully closed

Info:

Save Cancel

To start the call, click on the **Telephone Receiver Icon**: 

The processing can have these types:

State: Successfully closed

Selection Menu

- Successfully closed
- Unsuccessfully closed
- Not reached

To finish editing the info field must be filled. To end the processing press the save button.

Info:

Save Cancel

While editing an outbound call the other group members are informed about the processing state:

State of the Editing

In processing

Today - 10:53 1 Second

Stef Handy

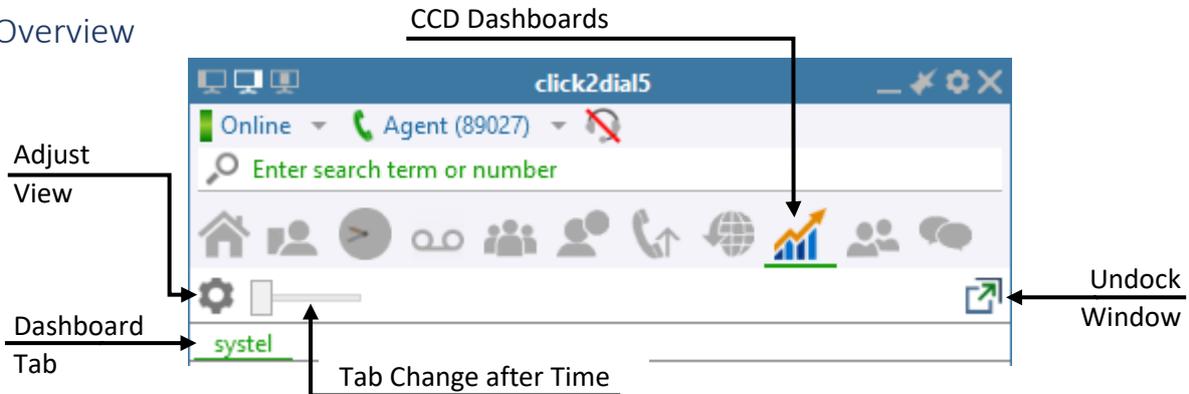
+49 151 xxxxxx (Deutschland)

In Processing (Nast Wolfgang)

CCD Dashboards

To see clear information and statistics about pilots and processing groups, dashboards are available for call centers. Dashboards can be configured on the cd25 server. Each dashboard has its own tab.

Overview



Undock CCD Dashboards Window

Clicking on this icon  undocks the **CCD Dashboards Window**. Instead of the **CCD Dashboards Tab** in the **Main Window** the **CCD Dashboards Window** is in a separate window.

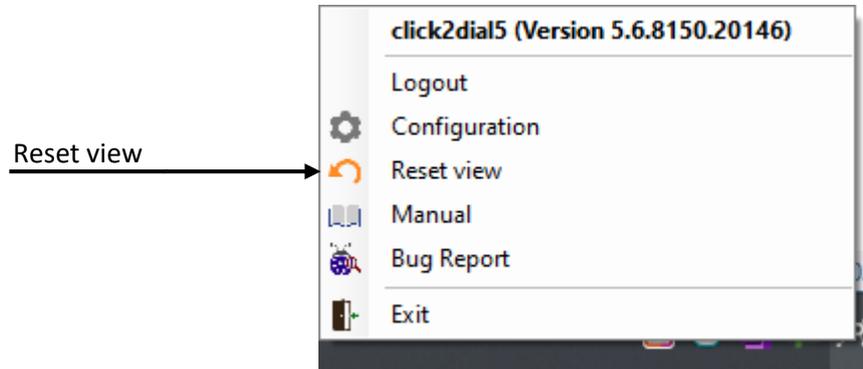


Next to the window options you already have in the **Main Window**, the **CCD Dashboards Window** can be docked to the upper top of the desktop by clicking on this icon. 

If the **CCD Dashboards Window** is closed  it will be a tab in the **Main Window** again.

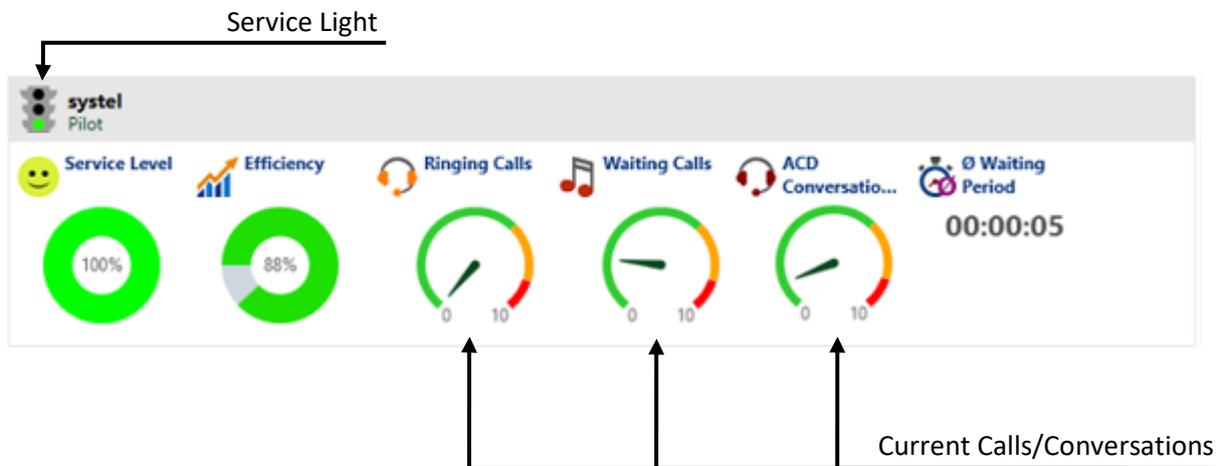
The complete view can be reset to default. To do this click with the right mouse button on the **c2d5 Icon** in the taskbar to reach the **Taskbar Menu** and choose **Reset view**.

Also see chapter **Taskbar Menu**.



Element Pilot

Here you see general current information about conversations. The data **Efficiency** and **Service Level** are taken over from the CCS.



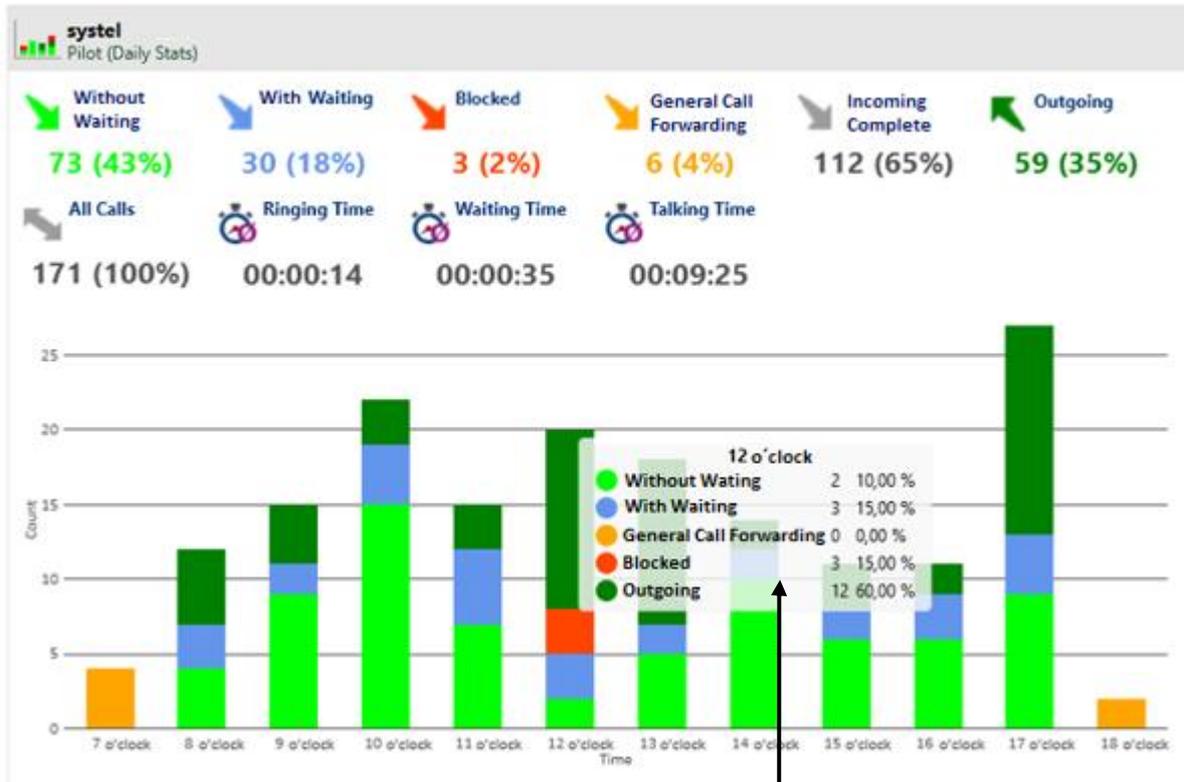
Service Light

The **Service Light** shows the current state of the dashboard elements. If, for example, agents are online and free the **Service Light** is green.



Element Pilot (Daily Stats)

Detailed information about calls and conversations are displayed here. If the mouse cursor is moved over a bar, details to the respective hour is displayed.



Info From Chosen Hour

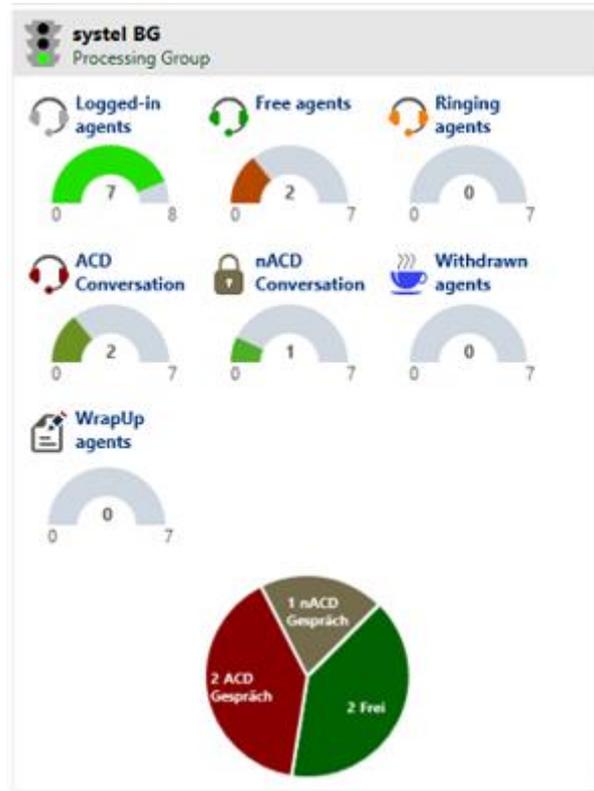
Element Queue

Current statistics to waiting conversations are displayed in this overview.



Element Processing Group (Agents)

Current information about agents is displayed here.



Tab Change after Time

If there are several dashboards, you can set on the slider after which time the view changes to an other **Dashboard Tab**. (0-60 seconds). To move the slider, click and hold to drag.

Adjust Dashboard View

Clicking on the **Gear Icon**  opens the view settings. The sorting and size of the dashboard elements and the display of the instruments can be set here.



 Move Element to the Left

 Enlarge Element Horizontally

 Move Element to the Right

 Shrink Element Horizontally

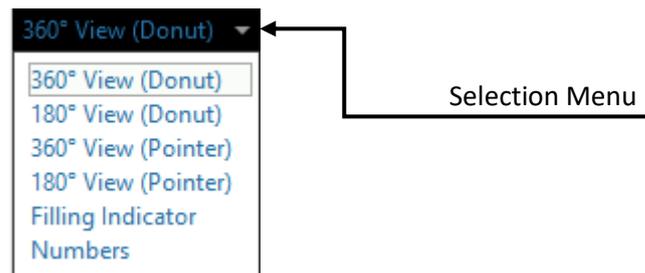
 Move Element Up

 Enlarge Element Vertically

 Move Element Down

 Shrink Element Vertically

The presentation of the instruments can be changed to following:



Examples:

360° View (Donut)



180° View (Donut)



Filling Indicator



360° View (Pointer)



180° View (Pointer)



Numbers



Internet Phonebook

A connection to ©DasTelefonbuch can be set on the c2d5 server, so this tab is available. Then access to an actual telephone number database is enabled.

Overview

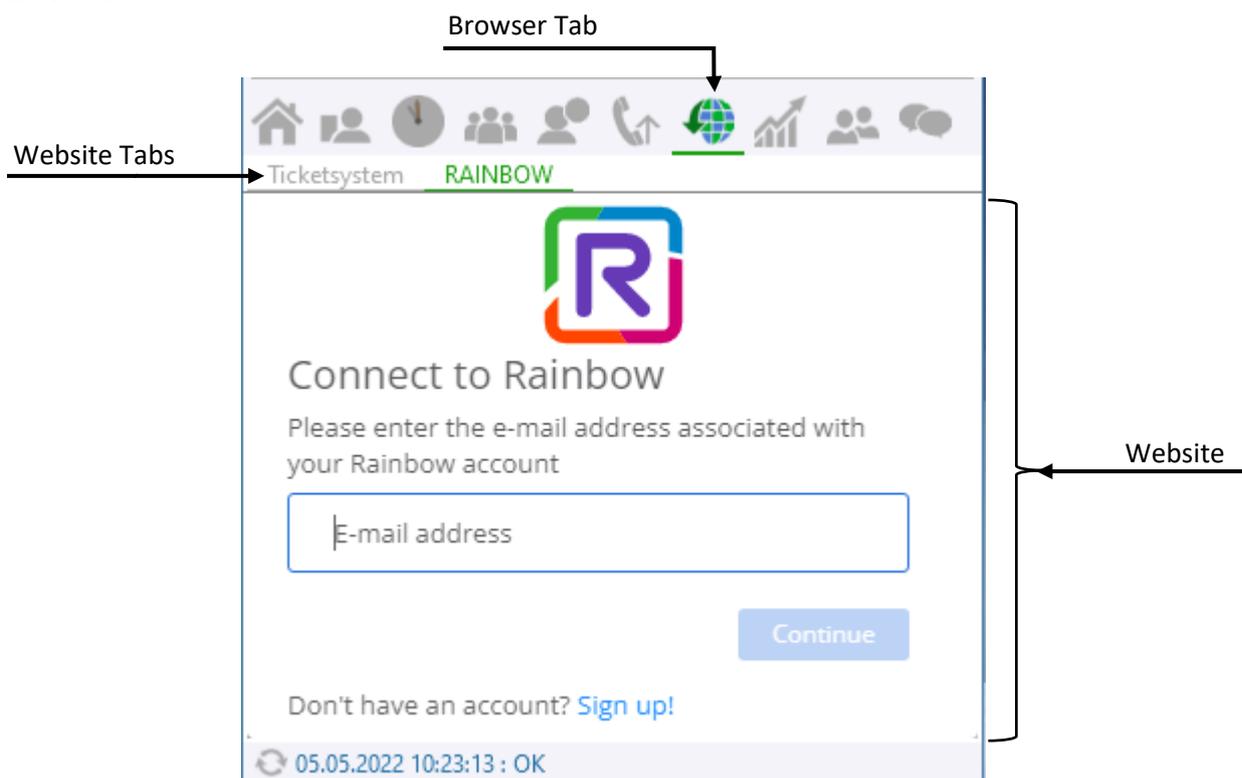


To search enter name, telephone number, city, postcode and/or phone prefix in **Search Fields** and press return.

Browser

Websites like a ticket system or time management tool can be integrated here. On the c2d5 server this tab can be configured.

Overview



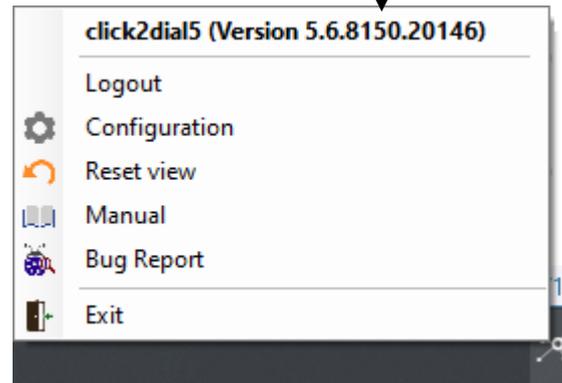
Taskbar Menu

To reach the **Taskbar Menu** click with the right mouse button on the **c2d5 Icon** on the right in the taskbar:



Overview

Info Software Version



Logout The user will be logged out. See also chapter **Logout**.

 **Configuration** The Settings menu will be opened. See also chapter **Settings/Configuration**.

 **Reset view** The view settings of the client will be reset to the origin settings. This is helpful when you can't find the c2d5 window anymore, for example when using a second monitor which is not available after a new login.

 **Manual** This is a link to the systemel knowledge base website.

 **Bug Report** This is a link to the systemel bug report website, to report errors of the software. We also appreciate suggestions to new features.

 **Exit** c2d5 will be quit without a security request.

Taskbar Info

New missed calls, outbound list entries, voice mails on the answering machine or chat messages are shown with a blinking number in the **Taskbar Icon** of the client:



Busylight

c2d5 automatically recognizes a connected **Busylight** by USB. This light shows your colleagues your communication status visually. Depending on the status it changes the color of the LED.

Following color standard is used:

blinking green = incoming call
red = active call
blinking blue = new message

Busylights can be bought at systel.



Door Camera

c2d5 supports the usage of door cameras. Pictures of the door camera can be assigned to users with the c2d5 manager. Then the door camera is an extra tab in the **Browser Tab**.

If the doorbell rings, the door cam picture appears in a separate popup window and the caller popup appears. By accepting the call, a conversation to the door intercom is made. By clicking on the **Door Opening Icon** in the door cam picture the door can be opened. Also, by the predefined **DTMF Tones** the door can be opened. See chapter **Call, Answer, and Hang up-> DTMF Dialing**

