CALLISTO

# CALLISTO OPERATOR CONSOLE

COC CLIENT MANUAL

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# System overview

For the system to function, CUCM needs to be set up and running. Terminals also need to be defined on the CUCM. Those terminals need to be assigned to a CUCM application user in order to be usable by Callisto.

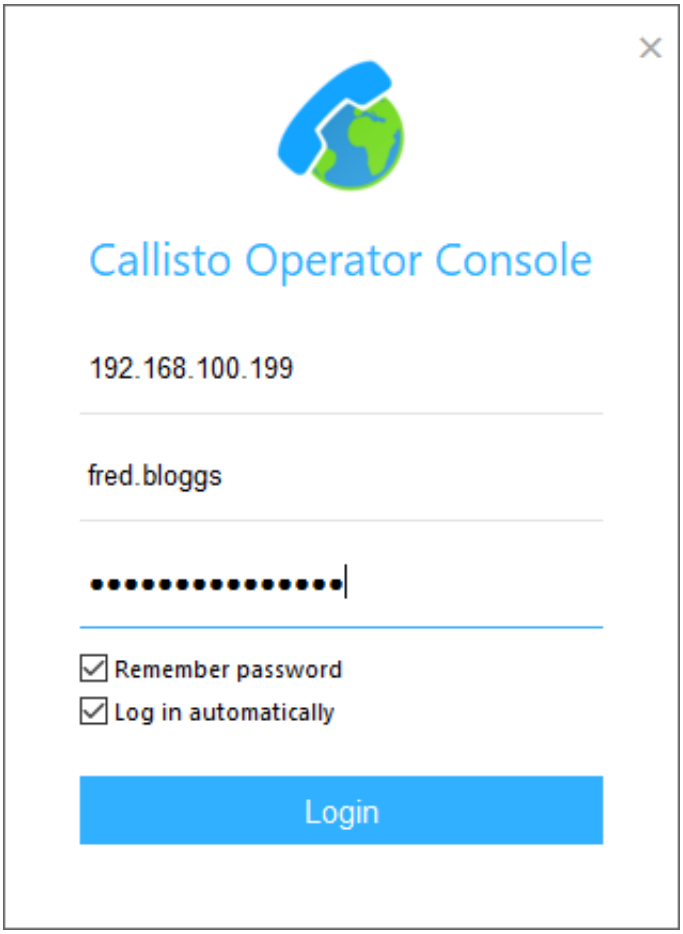
End users can be defined on CUCM and imported to Callisto afterwards, or they can be defined on Callisto directly. After importing the phones from CUCM to Callisto, terminals can be assigned to users. At this point, users need to be imported into the COC system. This can be done either manually or automatically at a defined interval (see COC Configurator manual – Users).

Based on the imported users, clients need to be created for all the users that need to be able to controll the phones (i.e. agents). These clients are necessary for the operators to connect to COC. Client creation is described in the COC Configurator manual – Clients. Every client needs to be assigned to a user, otherwise no device (line) will be assigned to the client. Without a device (line), an operator will not be able to place or receive calls, and the COC Client cannot be used.

# COC Client overview

COC Client is a software which operators use to control telephone calls. In order to be able to connect to COC Client, a *client* entity needs to be defined in the COC Configurator (see COC Configurator manual – Clients).

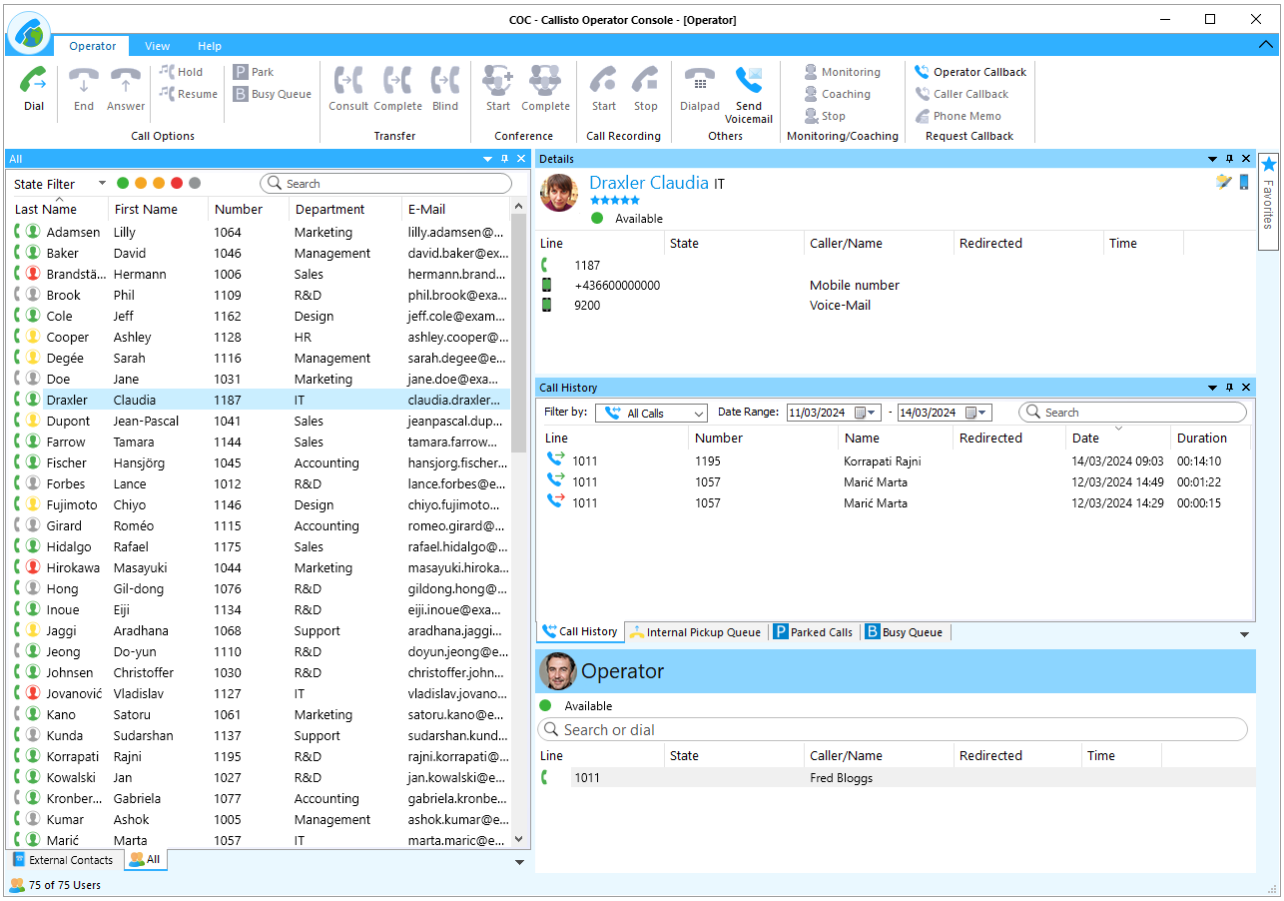
Upon launching the COC Client, the user is presented with the login dialog. In this dialog, operators need to enter the Callisto IP address and their user credentials.



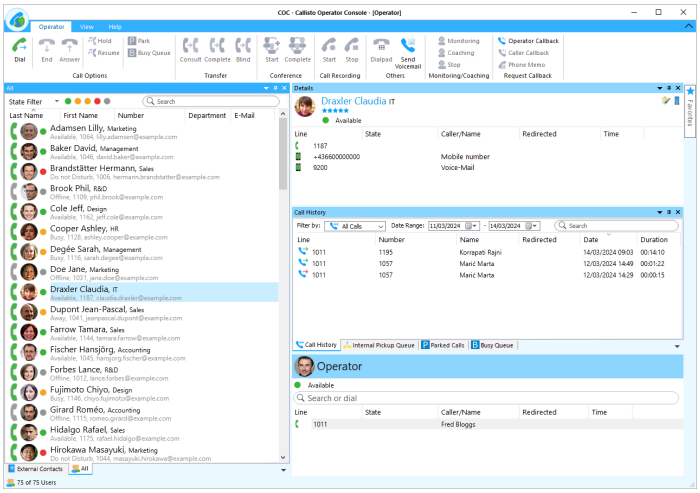

After filling in the required fields, the COC Client is started and the main view is displayed.

The main view consists of four panes:

- The Users pane (left): Contains tabs for all user lists, outlook contacts, directories, and groups you have access to.
- The Details pane (top right)
- The Calls pane (middle right): Contains the *Call History*, *Internal Pickup Queue*, *Parked Calls* and *Busy Queue* tabs
- The Operator pane (bottom right).



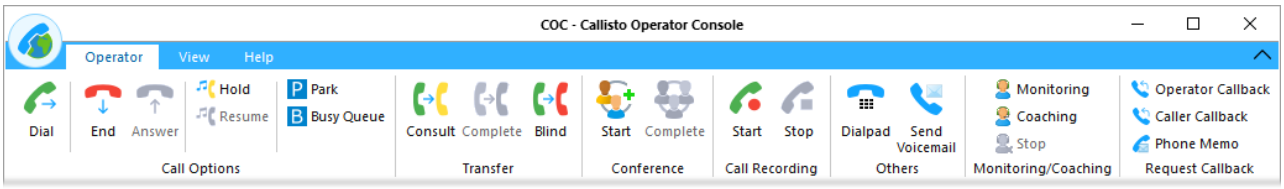

COC main window (*Users* pane in *Detailed* view)



COC main window (*Users* pane in *Photo-List* view)

# Sections in main view

## Call controls (ribbon bar)




The ribbon at the top of the main window is the main area of the COC Client. This is where all the most important call-related operations are performed.

All options related to IP telephony are available here and will be described in detail in the following chapters.

## Pane “Users”

This section provides details about all the users and groups the client has access to. At the bottom strip of this section, you find all the groups that are assigned to this client (see COC Configurator – Groups) and additionally, a tab for the contacts available via Microsoft Outlook. Outlook contacts are fetched from the local Microsoft Outlook application. Switching to a group-related tab will show the users that are assigned to the respective group.

Users in the list can be sorted by any of the values for which columns exist (last name, first name, number, department, email address). Clicking on a column label will sort the contacts by this value in ascending order, clicking the same column again will sort the contacts in descending order.

The search field in the top right corner of the section can be used to search for users by any of the values provided. The search algorithm uses partial word matching, providing greater flexibility.

Every entry in the list features a handset icon on the very left. This icon the status of the device which the user controls. There are four statuses:

The device status is not directly set by the user, but is determined by the user's usage of the terminal.

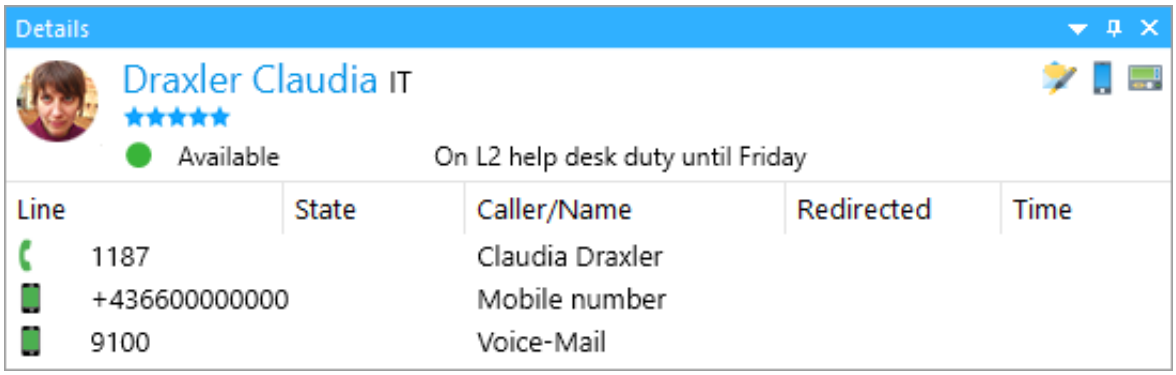
In addition, the handset icon may feature a blue arrow next to it, indicating that the device is set to forward incoming calls. If you call such a device, your call will be forwarded to the number set by the device owner, regardless of the device status.

A second status can be set manually. This user status is represented as a colored user icon in *Detailed* view, or as a colored circle to the right of the user's picture in *Photo-List* view.

This status can be set by the users themselves, or by any user who has permission to change user statuses (see COC Configurator – Clients).

## Pane "Details"

If a user is selected from the *Users* pane, the user's details are displayed.



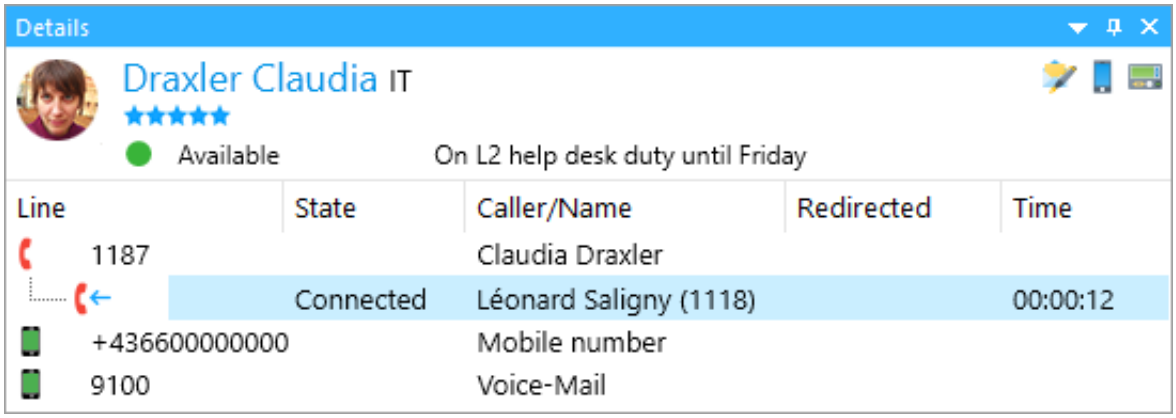

The top left corner shows the profile picture, name, and department of the user. Below the name is the VIP status, followed by the presence status and the personal status message. Operator users may have the privilege to change the presence state and personal status message of other users. This privilege can be enabled or disabled in the COC Configurator (see COC Configuration – Clients).

On the right side are buttons dedicated to the email, mobile phone and pager of the selected user, if the respective means of communication are available. Clicking on the email icon allows for a direct email conversation with the user, and clicking on the pager or mobile phone symbol will directly access the

respective numbers in the number box.

The lower half of this pane contains information about lines which are assigned to the user. In the screenshot above, the four-digit number at the top of the list is a CUCM line originating from the terminal assigned to the user. The number below is a Callisto line (see COC Configuratior – Callisto lines). The names of the Callisto lines are configured in CUCM.

If a line is making or receiving a call, the columns State, Caller/Name, and Time show values regarding the call and the connected line.

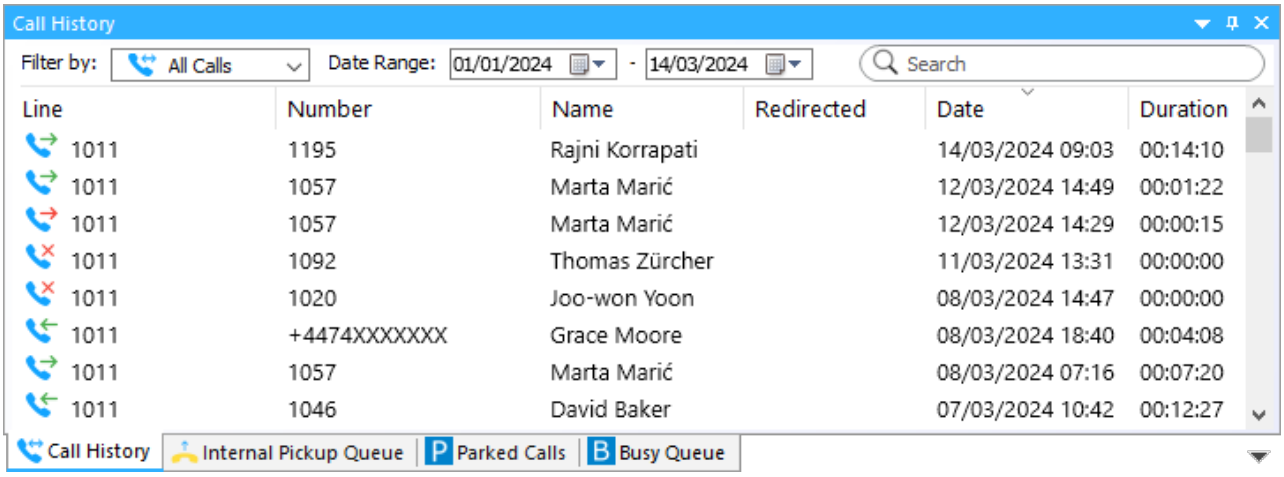



The handset icon right below the line in use represents the state of the call. A red icon means that a phone call is currently connected, an orange means that the device is either ringing or waiting for an outgoing call to be answered. The blue arrow next to the handset icon indicates the direction of the call; an arrow pointing towards the handset indicates an incoming call, an arrow pointing away from the handset indicates an outgoing call.

## Pane “Calls”

This pane consists of four tabs:

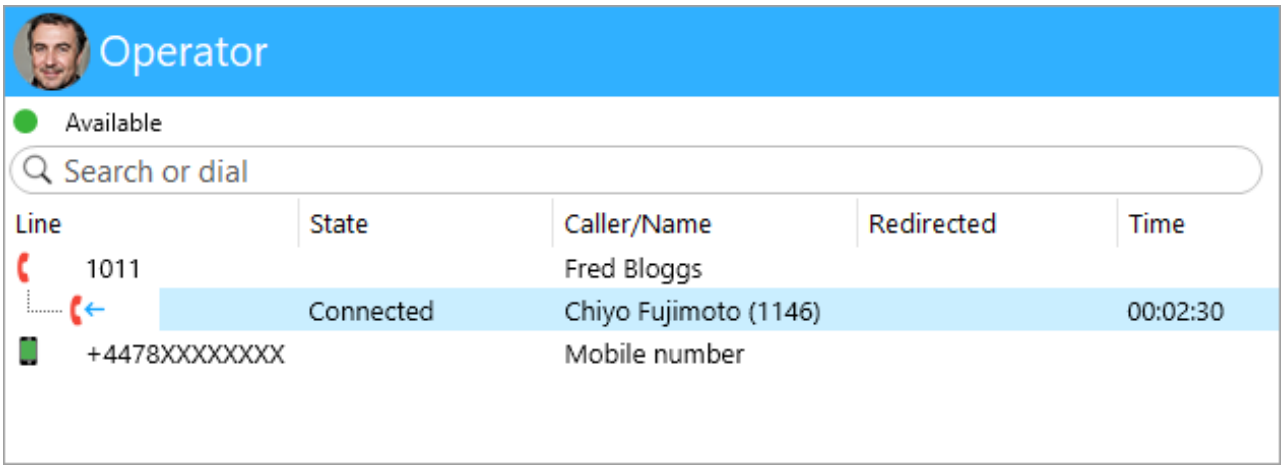
- Call History: Shows all the operator’s finished calls.
- Internal Pickup Queue: All incoming calls directed at a group which the user is part of will be listed here. These calls can be answered by the operator.
- Parked Calls: Shows all calls that are currently parked in the Callisto system (see Call options).
- Busy Queue: Shows all calls currently in Busy Queue (see Call options).




The call history can be filtered by type of call (received, called, missed and not answered), and by date. Additionally, the history can be searched by any known value (line, number, name, date, or duration). The search algorithm will show results that *start with* the search string.

## Pane “Operator”

This section shows information about the operator, i.e. the user currently logged into COC at this machine.




Besides setting the presence state and status message of the operator, this pane features a search field labeled Search or dial. This is the global search field where the operator can search for contacts or directly dial a phone number.

The lower half of this pane contains information about the lines which are assigned to to the operator. In the screenshot above, the four-digit number at the top of the list is a CUCM line originating from the terminal assigned to the user. The number below is a Callisto line (see COC Configuratior – Callisto lines). The names of the Callisto lines are configured in CUCM.

The operator will see all incoming and outgoing calls in this section. If multiple lines are available, the operator needs to choose line which the call will be placed on: select a line by clicking on it and then dial the number.

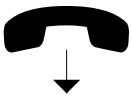
# Call operations

The following operations call all be accessed from the Call Options section in the ribbon bar.

## Place a call

*Shortcut: Ctrl + Shift + D*

To place a call, enter the destination number in the number box/search field in the Operator section and click the Dial button or press the return key. You can also select this option by right-clicking any line and choosing Dial from the context menu.



## Hang up a call

*Shortcut: Ctrl + Shift + E*

Once call is active (either while dialing or being connected), you have the possibility to hang up the call by clicking the End button. You can also select this option by right-clicking the line and choosing End Call from the context menu.

## Answer a call

*Shortcut: Enter key*

If there is an incoming call, you can answer it by clicking the Answer button. You can also select this option by right-clicking the call and choosing Answer Call from the context menu.

## Hold a call

*Shortcut: Ctrl + Shift + H*

To put a call on hold, simply select it from the list in the Operator section and then click the Hold button. You can also select this option by right-clicking the call and choosing Hold Call from the context menu.

## Resume a call

*Shortcut: Ctrl + Shift + R*

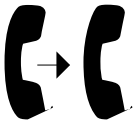
Select a call which is currently on hold and click the Resume button. You can also select this option by right-clicking the call and choosing Resume Call from the context menu.

# Routing operations

In a scenario where an agent is talking to a customer and needs to consult with another agent, the initial agent can initiate consultation transfer. In that case, the original call is put on hold and a new call is placed between the first and second agent. After the agents have finished consulting, there are two possible options:

- The first agent ends the call with the second agent and resumes the call with the customer.
- The first agent transfers the customer to the second agent.

The respective operations are located in the Transfer section of the ribbon bar.



## Initiate a consultation

*Shortcut: Ctrl + Shift + T*

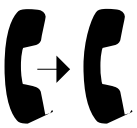
To initiate consultation transfer, enter the number of the agent with whom to consult and click the Consult button. At this point, the call with the customer is put on hold and the call with the other agent is started. This can also be done by dragging and dropping the call on the desired agent in the user list section on the left side. You can also select this option by right-clicking the call and choosing Consultation Transfer from the context menu.

## Complete a transfer

*Shortcut: Retrun key (while on call with the second agent)*

To completely transfer the call to the other agent (i.e. initiating a call between the customer and the second agent and end the original call with the first agent), click the Complete button. You can also select this option by right-clicking the call and choosing Complete Transfer from the context menu.

If you don’t want to transfer the customer’s call to the second agent and resume the call with the customer instead, simply hang up the call with the second agent. The initial call can then be resumed normally.



## Blind transfer

*Shortcut: Ctrl + Shift + B*

To transfer the customer to a second agent directly without first consulting with the second agent yourself, enter the number to transfer the customer to and press the Blind button. This way, you can also transfer the customer to numbers which are not in the contact list. You can also select this option by right-clicking the call and choosing Blind Transfer from the context menu.

Alternatively, hold down the control key, then drag and drop the phone call on an agent to whom the customer shall be transferred.

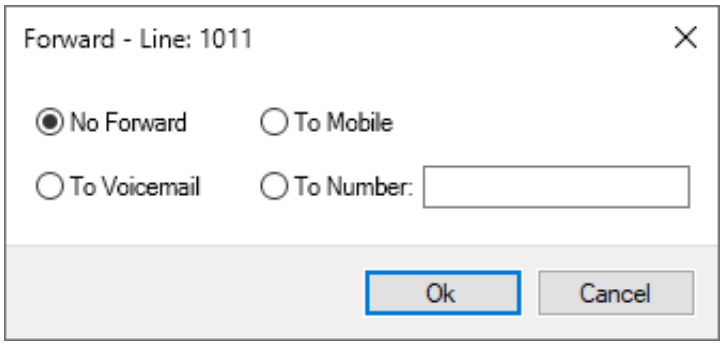
## Redirect a call

Instead of transferring a call, the first agent can also redirect a call to a second agent while the prone is ringing: the call gets immediately directed to the second agent without initiating a call between the customer and the first agent.

To do so, drag a ringing call and drop it on the agent you wish to redirect the call to.

## Call forwarding

If call forwarding is activated on a line, any incoming call to that line will be automatically redirected to the configured destination. To set call forwarding on a particular line, right click on a line and choose Forward from the context menu to access the forwarding configuration dialog box.



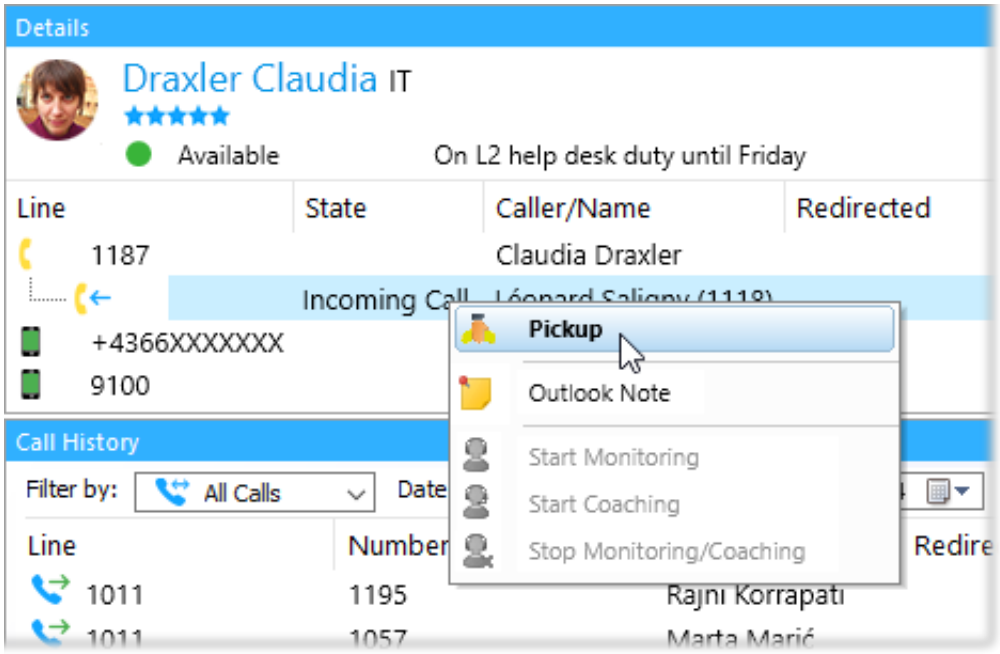

From this dialog box, forwarding to a pre-configured mobile number, voicemail, or a custom number can be set. The To Mobile option will forward calls to a Callisto line associated with the operator.

If multiple Callisto lines are available, you need to select the line you want  to use for forwarding before opening the forwarding configuration dialog box.

If there are no Callisto lines associated with the operator, the To Mobile option will be disabled.

## Intercept a call

If you select any agent from the *Users* pane, the current status of the agent's devices can be seen in the *Details* pane. If you observe an incoming call on one of the agent's devices, you can intercept the call by right-clicking it and choosing Pickup from the context menu. This way, the call will be connected to you directly without any action from the original agent's device.




All currently ringing calls that you have permission to intercept can also be seen in the *Internal Pickup Queue* tab in the calls-related pane.

# Conference operations

## Start a conference

*Shortcut: Ctrl + Shift + C*

If a call is currently connected, you have the option to start a conference. Enter the number of the contact you want to invite and then click the Conference button to initiate a conference. The first call will go on hold and a new call will be placed towards the invitee.

Alternatively, you can drag and drop any contact from the *Outlook*, *Users*, *Call History* or *Favorites* tabs on the connected call to start a conference.

You can also start a conference by right-clicking the call and choose Conference from the context menu.

## Complete a conference

*Shortcut: Enter key*

Once you started a conference and selected all participants, you can initiate the conference call by clicking the Complete button.

You can also immediately complete a conference by holding down the control key while dragging a contact.

Once the conference call started successfully, all conference participants and their information details like number, nameThe name is available for internal contacts, or may be provided by CUCM., and duration in the call will be displayed inside the *Operator* pane.

The conference owner is indicated by a crown icon.

During a conference call, additional participants can be added, and the conference can be recorded. These options are available by right-clicking on the conference inside the *Operator* pane. The End Conference option is only available if you are the owner of the conference. This will remove all parties from the call.

You can remove any specific conference participant by right-clicking the participant and choosing Remove Participant from the context menu.

# Call parking and busy queue

## Park a call

*Shortcut: Ctrl + Shift + P*

Call parking is a feature where the agent puts a call on a special kind of hold from where it can be picked up by any other agent.

To put a ongoing call on hold, select it and click the Park button. You can also right-click the call and choose Park Call from the context menu.

Alternatively, you can drag the call and drop it on the *Parked Calls* tab(inside the calls-related pane) to immediately park the call.

## Pick up a parked call

To retrieve a parked call, go to the *Parked Calls* tab and double click on the parked call which you want to retrieve. Alternatively, you can dial the park number which can be found in the *Parked Calls* tab next to the corresponding call.

## Busy queue

*Shortcut: Ctrl + Shift + W*

If you want to redirect a call to an agent whose phone is currently busy, you can place the call in the agent's busy queue. The call will be on hold until the agent is available: once the agent ends the current call, he will be connected to the call in the busy queue immediately.

You can also put a call on the busy queue by right-clicking it and choosing Put Call on Busy Queue from the context menu. Alternatively, drag the call while holding the Shift key and drop it on the *Busy Queue* tab in the calls-related pane.

Once you put the call on the busy queue, it will appear in the *Busy Queue* tab in the calls-related pane. Here, the agent can see all calls he put on the busy queue, and if he has permission to see other agents' queued calls, they will be visible in the list as well.

If you redirect a call to an agent who is currently in a call or conference, the redirected call is placed automatically in the agent's busy queue as well. The answer will not be disturbed during the call and will get connected to the transferred call in the busy queue once the previous call has ended.

Any call can be picked up by double-clicking it.

# Call recording

In order to be able to record calls, *Built-In-Bridge* needs to be enabled on all involved devices via CUCM. Call recording will automatically stop when a call is hung up. All call recordings can be found on Callisto.

In most countries, recording telephone calls is subject to legal restrictions regarding privacy and data protection. Make sure to adhere to any applicable national and international laws when conducting call recordings.

## Start a recording

*Shortcut: Ctrl + Shift + S*

To record an ongoing call, click the Start button in the ribbon bar's *Call Recording* section. You can also initiate a recording by right-clicking the call and choosing Start Recording from the context menu.

## Stop a recording

*Shortcut: Ctrl + Shift + Q*

To stop a call recording, click the Stop button in the ribbon bar's *Call Recording* section. You can also stop the recording by right-clicking the call and choosing Stop Recording from the context menu.

# Monitoring and coaching operations

Operators have the possibility to monitor calls and to coach other agents.

- *Monitoring* means an operator is observing a call without actively participating in it, i.e. neither of the two other callers can hear the operator.
- *Coaching* allows an operator to coach another agent while the agent is in a call with a customer. The coach can only be heard by the agent, allowing the coach and the agent to talk to each other while the customer communicates only with the agent.

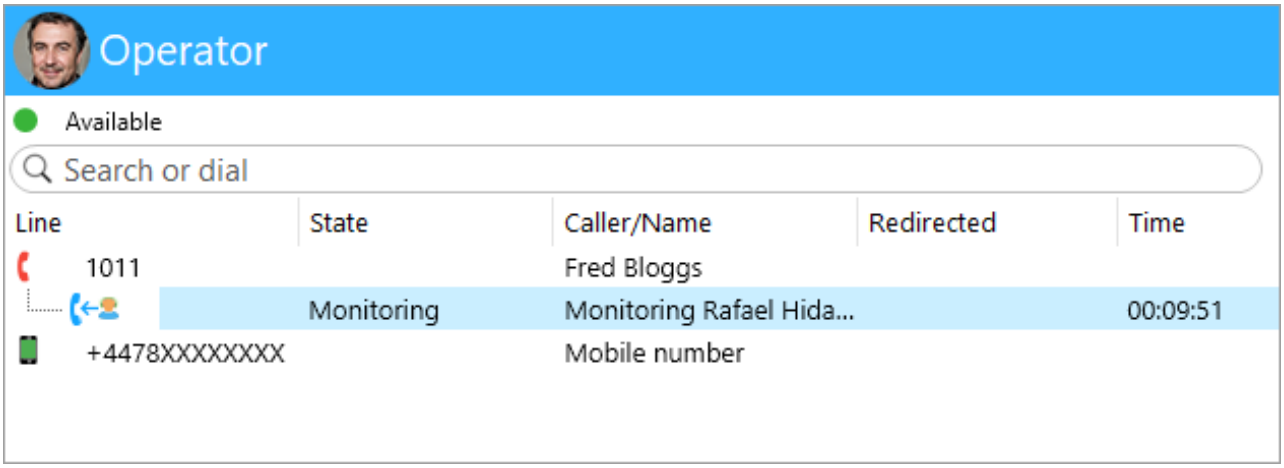
In order to be able to use monitoring and coaching operations, *Built-In-Bridge* needs to be enabled on all involved devices via CUCM.

In most countries, monitoring telephone calls is subject to legal restrictions regarding privacy and data protection. Make sure to adhere to any applicable national and international laws when monitoring calls.

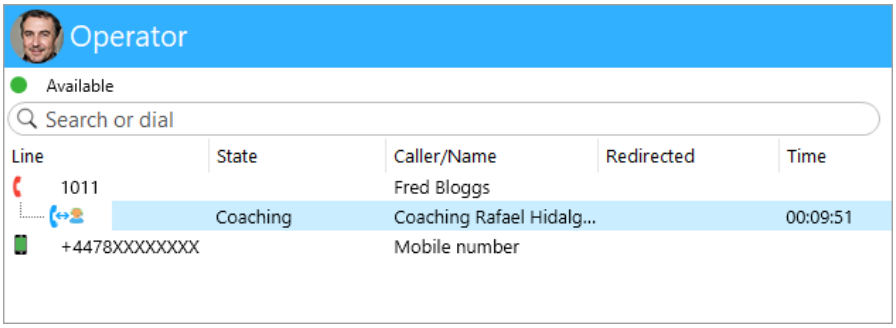
To start monitoring or coaching, select an agent who has an active call. Then click on the call an click either Monitoring or Coaching from the ribbon bar to start the respective action. Alternatively, right-click on the call in the *Details* pane and select either Start monitoring or Start coaching from the context menu. Switching between monitoring and coaching is possible by clicking the respective button on the ribbon bar.

To stop monitoring or coaching a call, click the Stop button on the ribbon bar's *Monitoring/Coaching* section. Alternatively, the monitoring/coaching session can be stopped by right-clicking the call and choosing Stop Monitoring/Coaching from the context menu, or by disconnecting from the call.

You can see the call you're monitoring or coaching in the *Operator* pane.




*Operator* pane: Monitoring a call

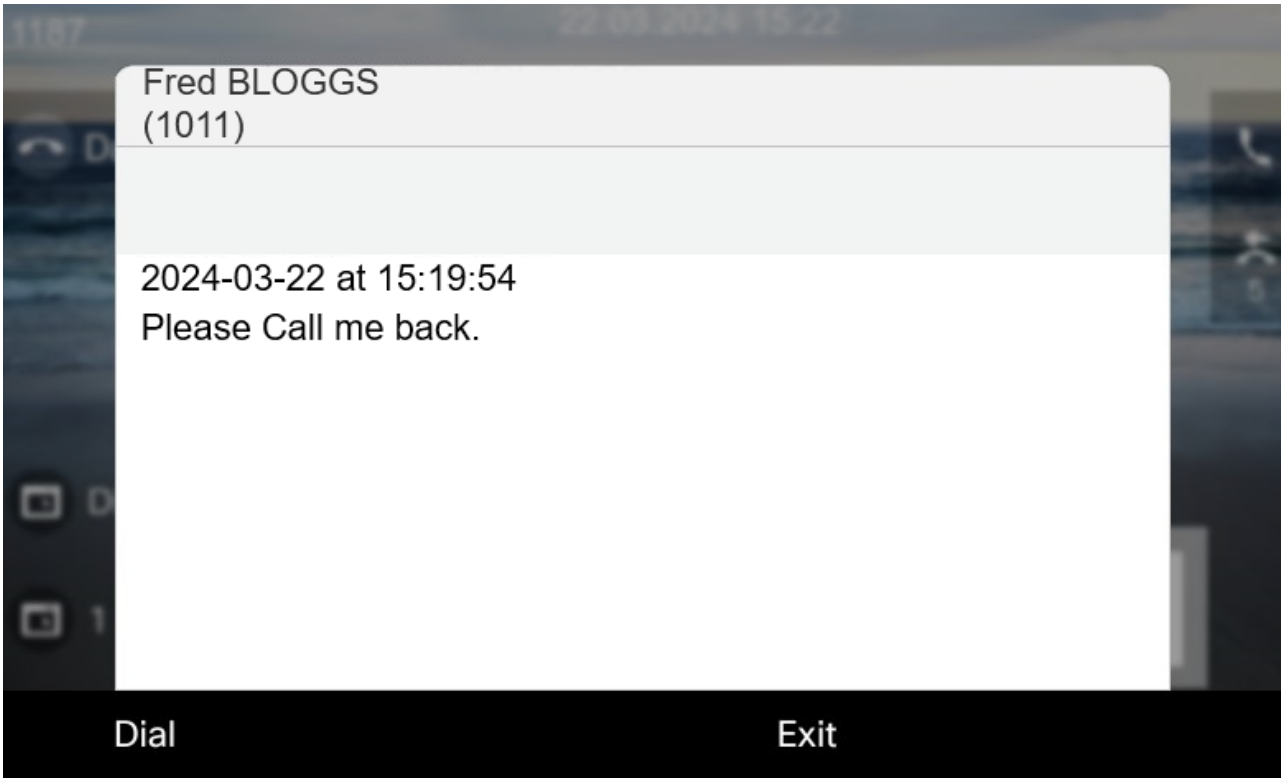



*Operator* pane: Coaching a call

# Callback and voicemail

## Send a callback request

With the COC Client, operators have the possibility to send callback requests to users. Select the user you want to send the request to and click the Operator Callback button from the ribbon bar. Alternatively, you can right-click the user and choose Send Callback Request option.

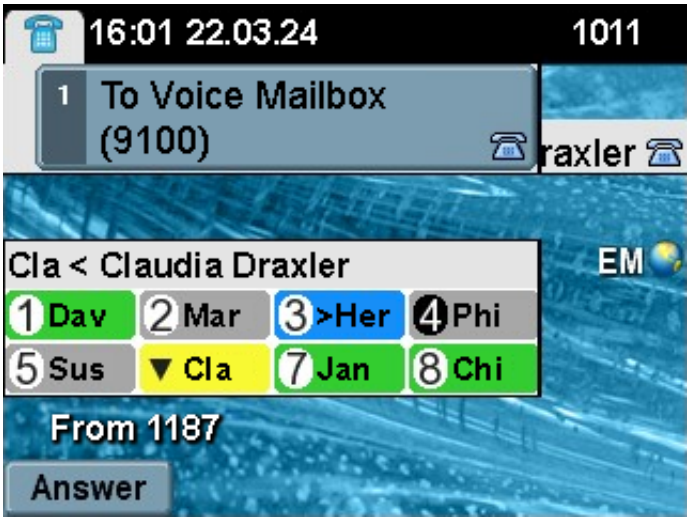



The callback message as seen on the addresse's phone.

After sending the callback request, the user will receive a text message on their Cisco IP Phone, containing the request message, details of the senderThe details contain the name and number of the sender, as well as the date and time when the callback message was sent., and two options: Dial and Exit. Choosing Dial initiates a callback to the sender immediately while Exit ignores the request and will return to the phone's previous screen.

## Send a voicemail

The operator can also send a voicemail instantly by selecting the user and clicking the Send Voicemail button.




An incoming call for recording a voicemail, as seen on the operator's phone.

After clicking the button, the operator will receive an incoming call from voicemail. Answer the call to record the message.

After hanging up, the voicemail will be delivered to the user, receiving a notification and the option to listen to the voicemail.

# Outlook and Exchange operations

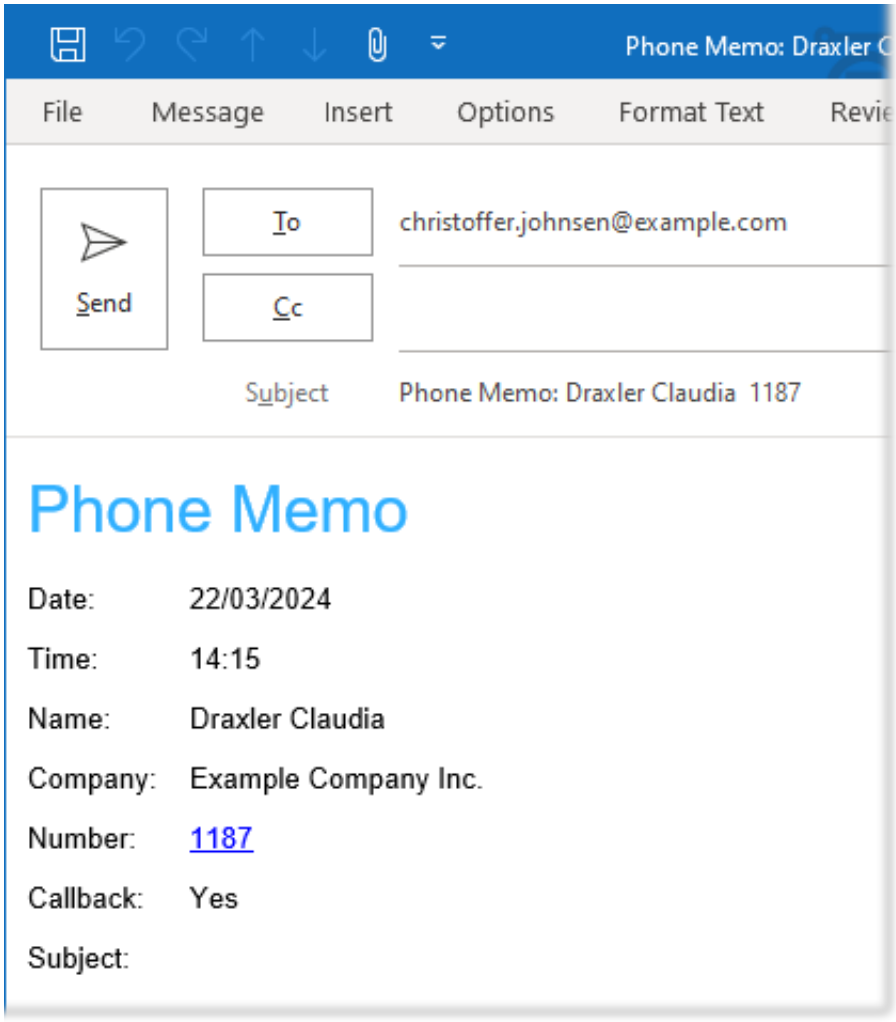
The following functionalities are only available if Outlook features are enabled. Go to Settings > Outlook and make sure that Enable Outlook Features is checked.

## Create an Outlook contact

You can create an Outlook contact from the remote party of a call by right-clicking the call and choosing Create Outlook Contact from the context menu. Microsoft Outlook's *New Contact* window will appear, the Phone number field being populated with the phone number of the call. Any other info can be entered manually. This option is available for current calls as well as completed calls (i.e. call history entries).

## Phone memo

The operator can write a phone memo during or after the call. Select a call from either the *Calls* or *Operator* pane and click the Phone Memo button from the ribbon bar. Alternatively, you can right-click the call and choose Phone Memo from the context menu. Microsoft Outlook will open a *New Email* window with the mail body containing several call details in a pre-formatted view. If you also have a user selected in the *User* pane, the mail's To field will be populated with the user's mail address. You can edit the mail manually before sending it.




## Customize phone memo template

You can customize the template of the phone memo by creating a template file using HTML and embedded CSS.

The following code shows the the default template used by COC, which you can use as a base for your custom template.

```
<html>
    <head>
        <style type="text/css">
            td {height: 28px; font-family: Arial; font-size: 10pt;}
        </style>
    </head>
    <body bgcolor="#ffffff">
        <table border="0" cellspacing="0" cellpadding="0">
            <tr>
                <td colspan="2" style="padding-bottom:10px;">
                    <h2><font color="#30B0FF" face="Arial">Phone Memo</font></h
2>
                </td>
            </tr>
            <tr>
                <td>Date:</td>
                    <td width="800px">@Date@</td>
            </tr>
```

```
            <tr>
                <td>Time:</td>
                <td>@Time@</td>
            </tr>
            <tr>
                <td>Name:</td>
                <td>@Name@</td>
            </tr>
            <tr>
                <td>Company:    </td>
                <td>@Company@</td>
            </tr>
            <tr>
                <td>Number:</td>
                <td>@PhoneNumber@</td>
            </tr>
            <tr>
                <td>Callback:</td>
                <td>Yes</td>
            </tr>
            <tr>
                <td>Subject:</td>
                <td></td>
            </tr>
        </table>
    </body>
</html>
```

You can use the following wildcards to insert the call details into the template:

| | |
|---|---|
| @Date@ | The date of the call |
| @Time@ | The time of the call |
| @Name@ | The name of the caller |
| @Company@ | The company of the caller |
| @PhoneNumber@ | The phone number of the call |

Safe the HTML file under the name PhoneAnnotation.htm at the location <*user directory*>\Documents\CTModule\COC\.

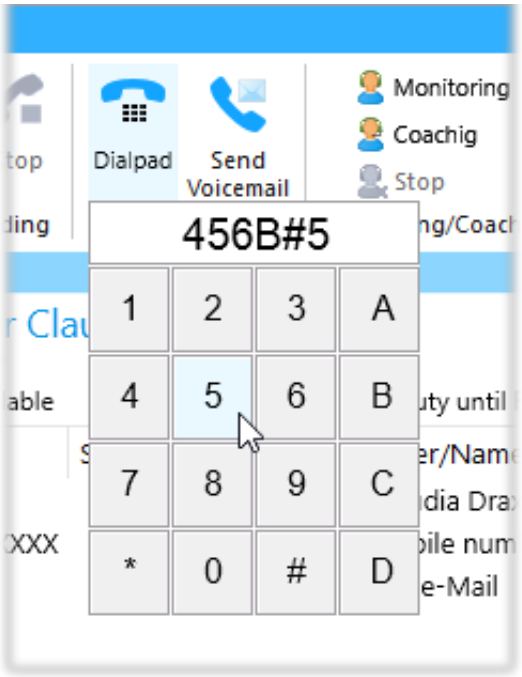
The file extension needs to be .htm, not .html.

The custom HTML code will be used as email template whenever you create a new phone memo.

## Exchange synchronization

COC Clients can synchronize with Microsoft Exchange through Callisto: Users can have their presence state automatically changed based on their Exchange calendar. For example, if a user has an appointment entered in his Exchange calendar, the COC Client will set his presence state to “busy” during the time of the appointment. Additionally, during Outlook meetings, details such as the meeting description, location and the time are displayed in the *Details* pane and the *Operator* pane.

# Miscellaneous operations




## Use DTMF signaling

COC has the capability to send DTMFDual-tone multi-frequency signaling digits, for example when navigating IVRInteractive voice response menus. Click on the Dialpad button and dial pad will appear where you can send DTMF digits by clicking on the corresponding button.

## Delete call history

Call history entries can be deleted by selecting one or multiple entries, right-clicking the selection and choosing Delete Record(s) from the context menu. A confirmation dialog will appear and after confirming the action, the selected call history entries will be deleted.

## Set a presence state and status message

To change your own presence state, click on the presence state icon in the *Operator* pane. A drop-down menu will appear and to choose the presence state. The personal status message can be changed by clicking the text field next to the presence state icon. Save the status message by either pressing the Enter key or by clicking away from the text field. If no status message is set, the following placeholder text will be displayed instead:

*<Enter personal status message>*

If you have permission to change other users' presence states and status messages, you can do so by selecting a user from the *Users* pane and changing the presence state and status message in the *Details* pane.

# Favorites

You can add users to the *Favorites* list by right-clicking a user and choosing Add to Favorites from the context menu. Alternatively, you can drag a contact from the *Users* pane and drop it on the *Favorites* pane.

You can access your favorites from the *Favorites* pane, which is by default located on the far right side of the COC window. Right-clicking on the pane shows a context menu where you can add a new favorite, edit or delete an existing one (if one is selected), or you can import favorites from a CSV file.

## Import favorites

Favorites can be imported from a CSV file. Applications like Microsoft Excel allow for export in the CSV format.

The file needs to have the following properties:

- The separator must be a semicolon (;). This is the standard separator when exporting an Excel file to CSV.

- Every line represents one contact, containing the following values:

    1. Phone number
    2. Last name
    3. First name
    4. Company
    5. Type of phone number (can be either BUSINESS, PRIVATE, or MOBILE)
- The phone number and either the first or last name need to have a non-empty value. The other values may be empty.
- The line ending must be of the format \r\n. While this is standard in Windows, different line endings are used in Unix and Unix-like systems. Make sure that the correct line endings are used, especially when the file was created on macOS or Linux.

If a row is not valid, it will be skipped during import. Any duplicate rows in the CSV file or contacts that already exist in the COC favorite list will be skipped as well.

The import process is as follows:

1. Prepare a CSV file with your favorites entries as specified above.
2. In the *Favorites* pane, right click inside the pane and choose Import Favorites from the context menu.
3. In the *Import Favorites* dialog, click on the Browse button and locate the CSV file.
4. Click on the Import button to start importing your favorites.
5. During the import, a progress bar on the *Import Favorites* dialog will show the progress of the import. Once the import has finished, the dialog will close and all the imported favorites will be visible in the *Favorites* pane.

# User groups

Operators can create custom user groups that are only be visible to them. (These groups can contain users that are in groups which are already visible to the operator.)

## Create a group

To create a user group, click the COC icon in the top-left corner and choose Manage User Groups from the pull-down menu. A new window will open, containing the three areas *User Groups*, *Assigned* and *Users*.

Right-click on the *User Groups* area (on the very left) and select New User Group from the context menu. After that, the *Users* area (on the very right) will be populated with all the available users. Select one or multiple users and click on the blue leftwards arrow to add them to the group. After clicking the Ok button in the bottom-right corner of the dialog, the new user group will be created and assigned to the operator. It will appear as a new a tab at the bottom of the *Users* pane.

## Delete a group

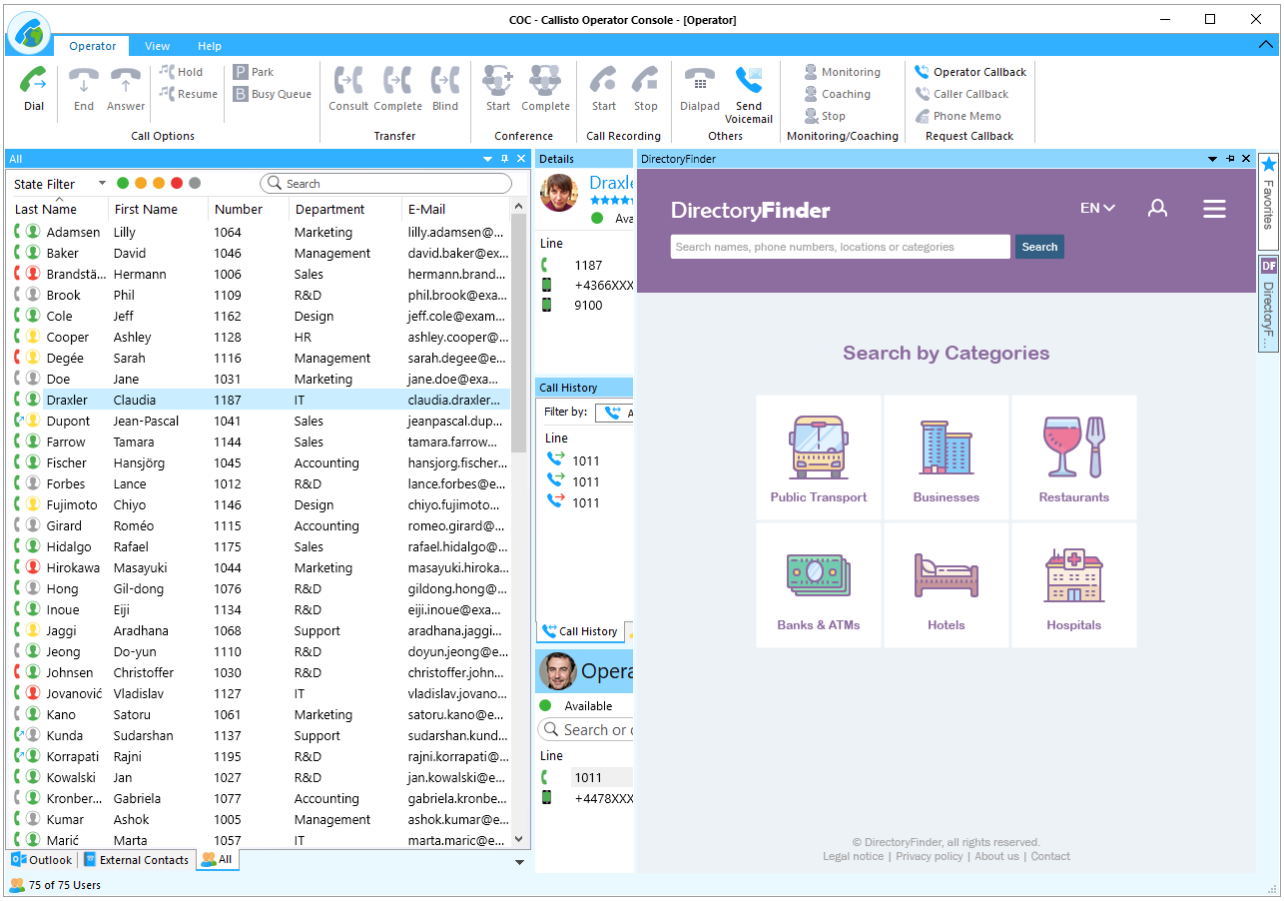
To delete a user group, click the COC icon in the top-left corner and choose Manage User Groups from the pull-down menu. In the *User Groups* area, right-click the group you wish to delete and choose Delete User Group from the context menu. After confirming the action, the user group will be deleted.

## Rename a group

To rename a user group, click the COC icon in the top-left corner and choose Manage User Groups from the pull-down menu. In the *User Groups* area, right-click the group you wish to rename and choose Rename User Group from the context menu. The new name will be saved by either pressing the Enter key or by clicking outside the text box.

# HtmlPanes

The COC client allows to display web pages inside the application with HtmlPanes. Administrators can determine which pages can be displayed using the COC configurator (see COC Configurator manual – Settings and Assignments). Once a web page is defined, you can access it by the tabs at the rightmost side of the COC client's main view.




Example of an external website as HtmlPane in the COC client.

To hide an HtmlPane, click anywhere outside the pane.

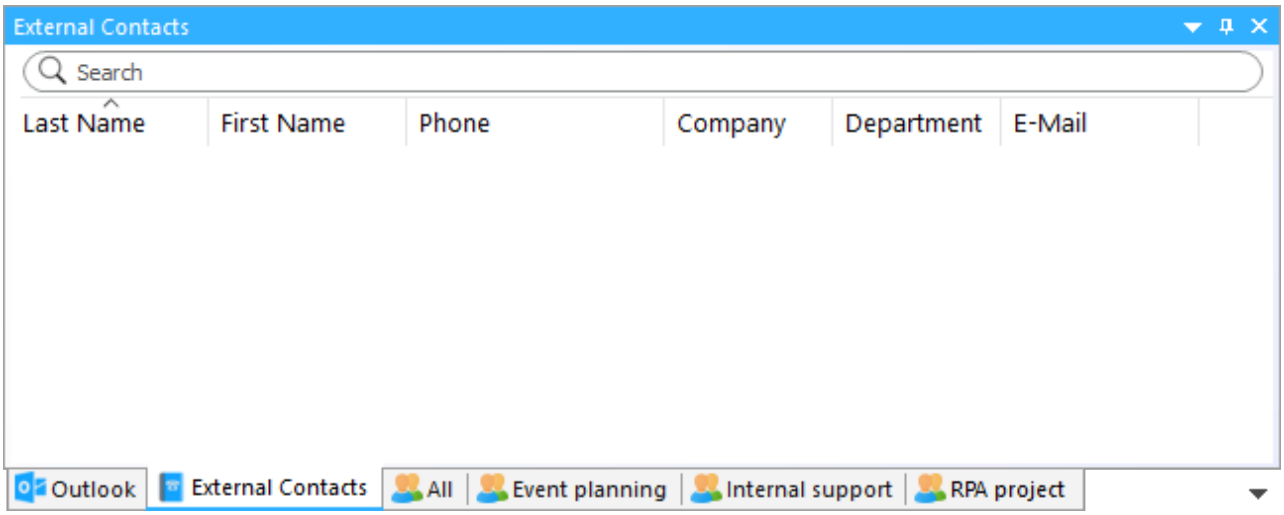
Some Callisto modules like ProfACD use HtmlPanes, so their functionalities can be used from within the COC client. Refer to the respective modules' manuals on their HtmlPane integration.

# Microsoft Dynamics CRM integration

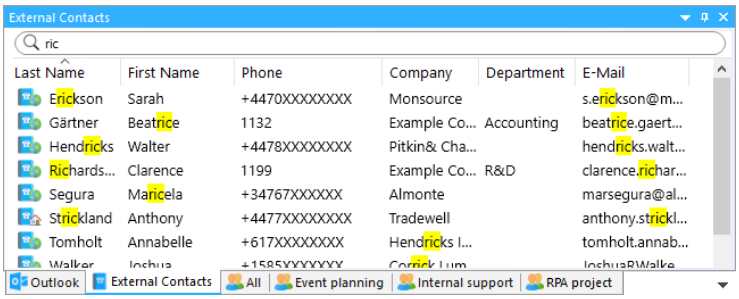
Callisto allows for Microsoft Dynamics pop-ups to appear during incoming calls. Based on the phone number of the incoming call, information on the related contact or lead will be shown. If the number is ambiguous (e.g. because multiple contacts or leads match the number), an additional pop-up will display a list of all contacts and/or leads that match the number. You can select the appropriate contact or lead from either pop-up.

# External contacts

In the *External Contacts* tab of the *Users* pane, you can search for external directory entries which are available on Callisto.




The default view of the *External Contacts* tab.



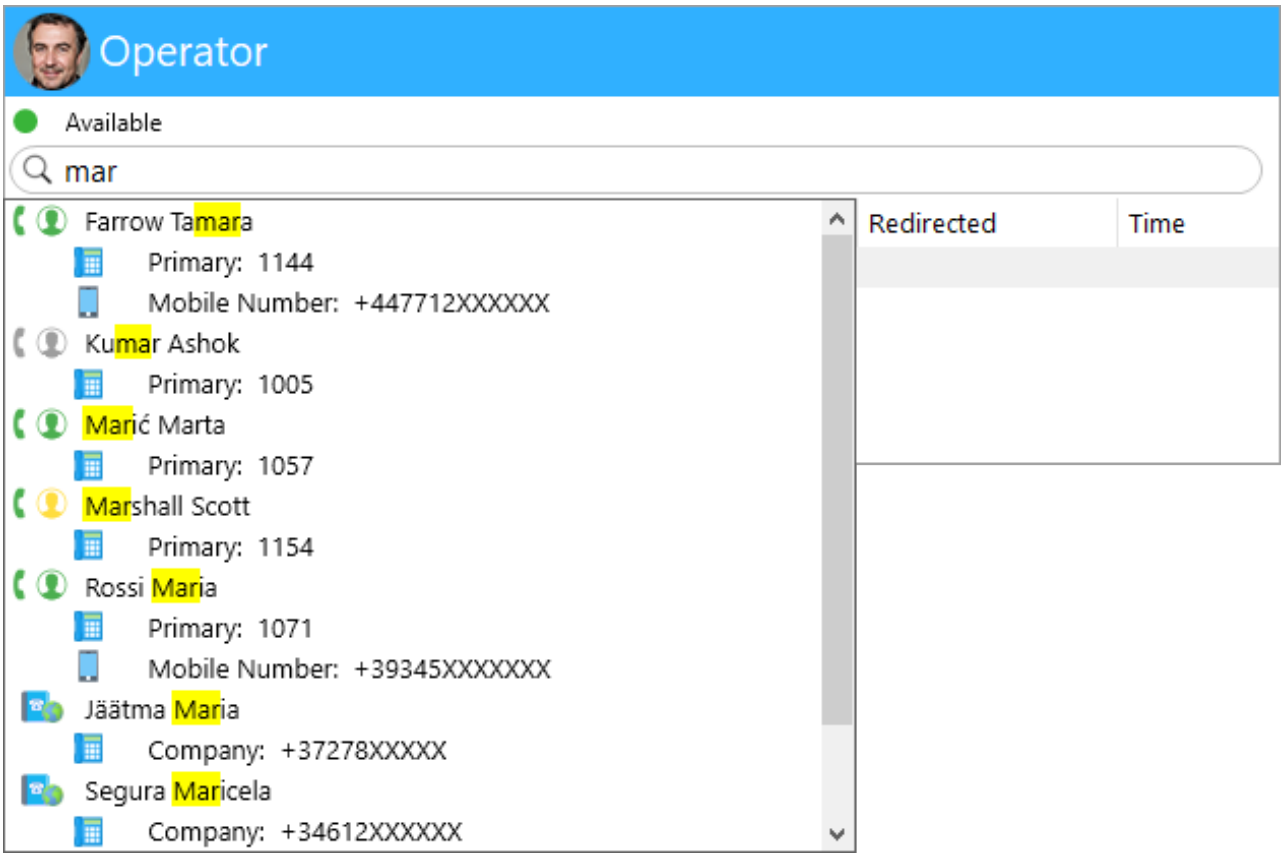

Search results in the *External Contacts* tab.

By default, the list appears empty. If you type a query in the search field at the top of the pane, matching results will be listed immediately. To list all external contacts, type the * wildcard in the search field.

Depending on the number of contacts saved in Callisto, listing all external contacts can take some time.

# Global search

The global search field is located in the *Operator* pane and has the capability to search any contact in a single place. Typing in this text field will show all matches from any entity.




The search results are sorted by kind of entity and are displayed in the following order:

1. COC users
2. Favorites
3. Outlook contacts
4. External contacts

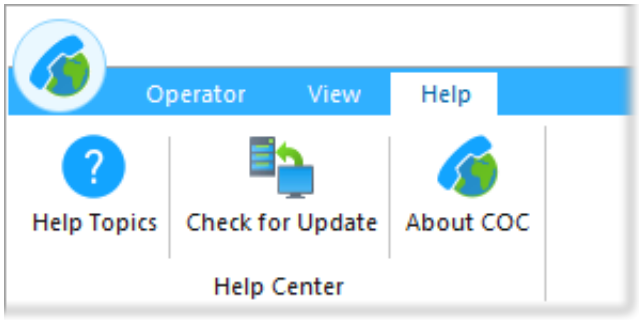
The fields searched during global search include the first and last name, phone number, email address, company name, and department name.

Clicking on a contact from the search results will reveal and select the contact in its respective pane, e.g. in the *User* pane's *All* tab if it is a COC user or in the *Favorites* pane if it is a Favorite entry.

Furthermore, the global search field can be used to dial a phone number. By entering a phone number and pressing the Enter key, a call will be initiated using your primary device.

# Help menu

In the ribbon bar, select the Help tab to access the following options.



## Help Topics

This option opens up a help document  containing information about navigating and using features in the COC client.

## Check for Update

As the name suggests, this option checks for updates and if there are updates available, it will prompt you if you want to update COC Client. Click Yes to update the COC client to the latest version. To check for updates, an Internet connection is required.

## About COC

This option shows information about the current COC client version and build number. This information is useful for COC support and the development team to solve any problems that might occur.

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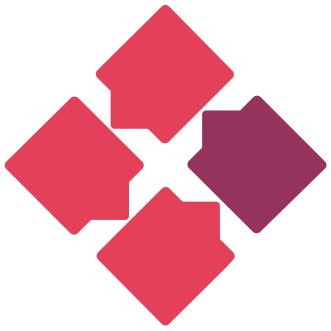

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