Better Connections by Design

COEO EmpowerUC™ WebApp

Business User Guide

COEO Solutions

July 2026

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Getting Started

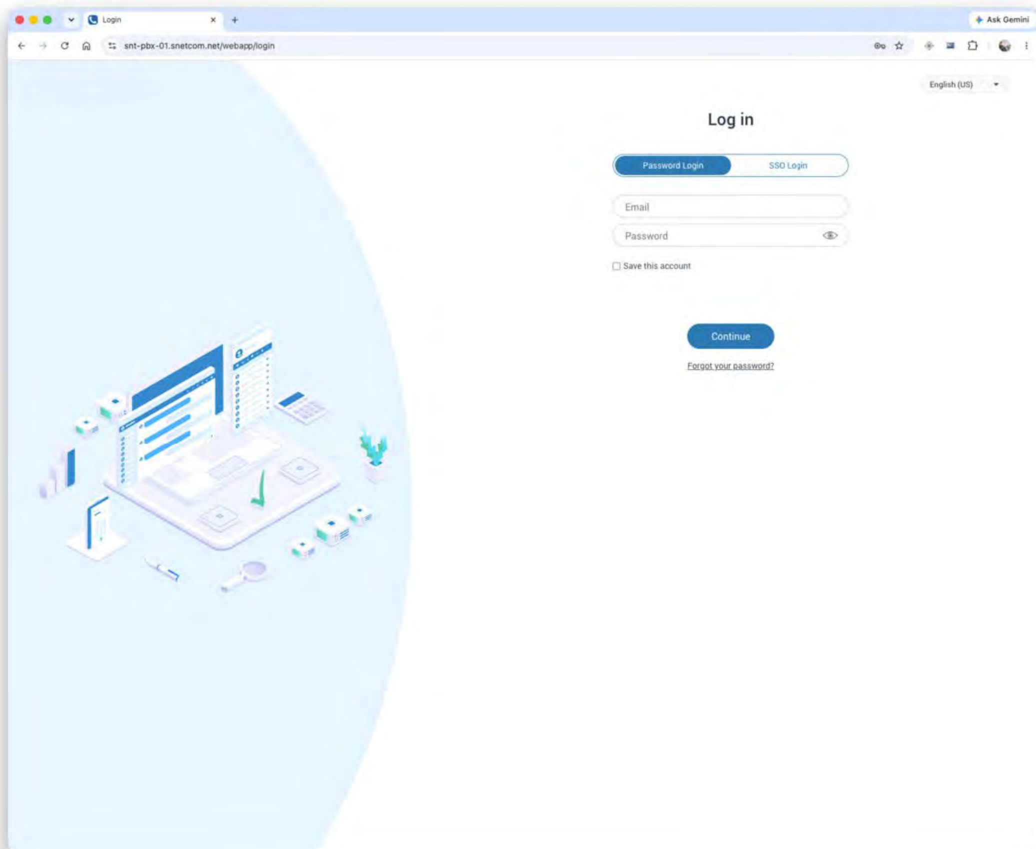
Accessing the App

COEO EmpowerUC™ WebApp works right in your browser — no installation required. It's compatible with all major browsers, including Chrome, Edge, Firefox, and Safari.

Your unique login URL is provided by your COEO Project Manager when your service is activated. Simply open your browser and navigate to that URL to get started.

Logging In

When you arrive at the login page, you'll have two ways to sign in depending on how your organization is set up.



The EmpowerUC™ WebApp login screen

Option 1: Password Login

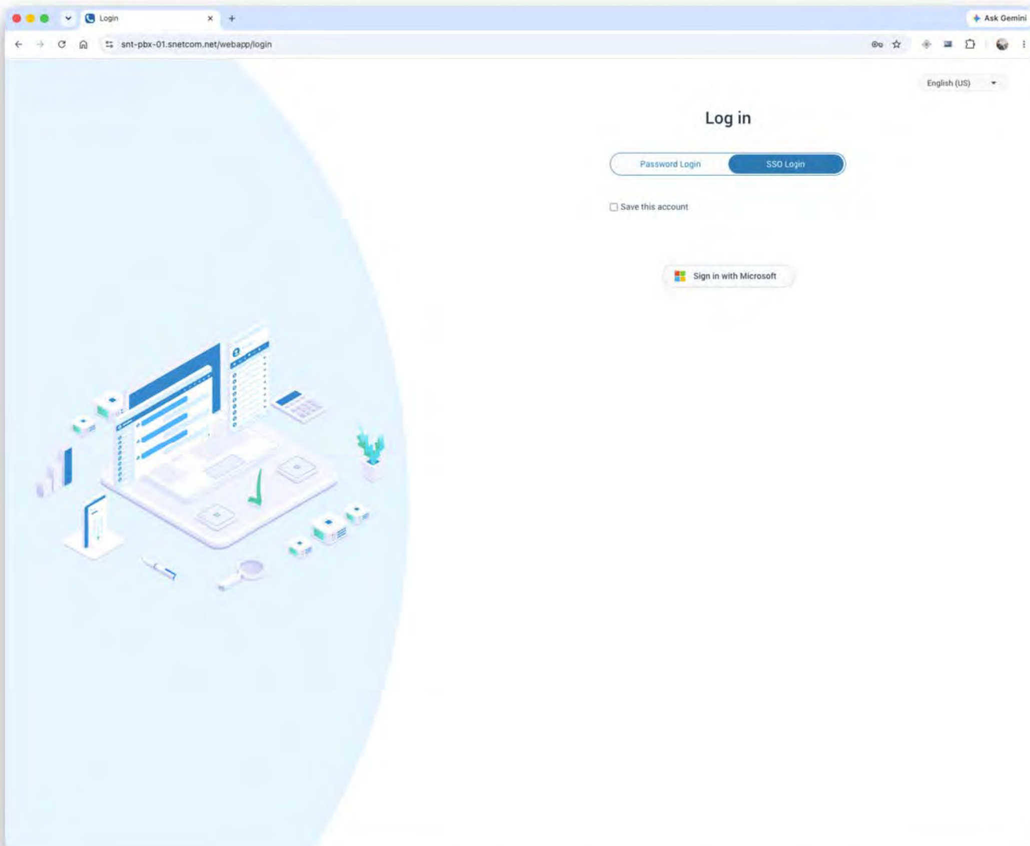
This is the standard login method. Enter your email address and password, then click Continue.

A few things worth knowing on this screen:

- **Save this account** — Check this box to store your credentials on this device so you don't have to re-enter them every time you log in.
- **Forgot your password?** — Click this link to kick off a self-service password reset. Instructions will be sent to your email address.

- **Show/Hide Password** — Click the eye icon in the password field to toggle password visibility.

Option 2: SSO Login (Single Sign-On)



SSO Login tab with Sign in with Microsoft option

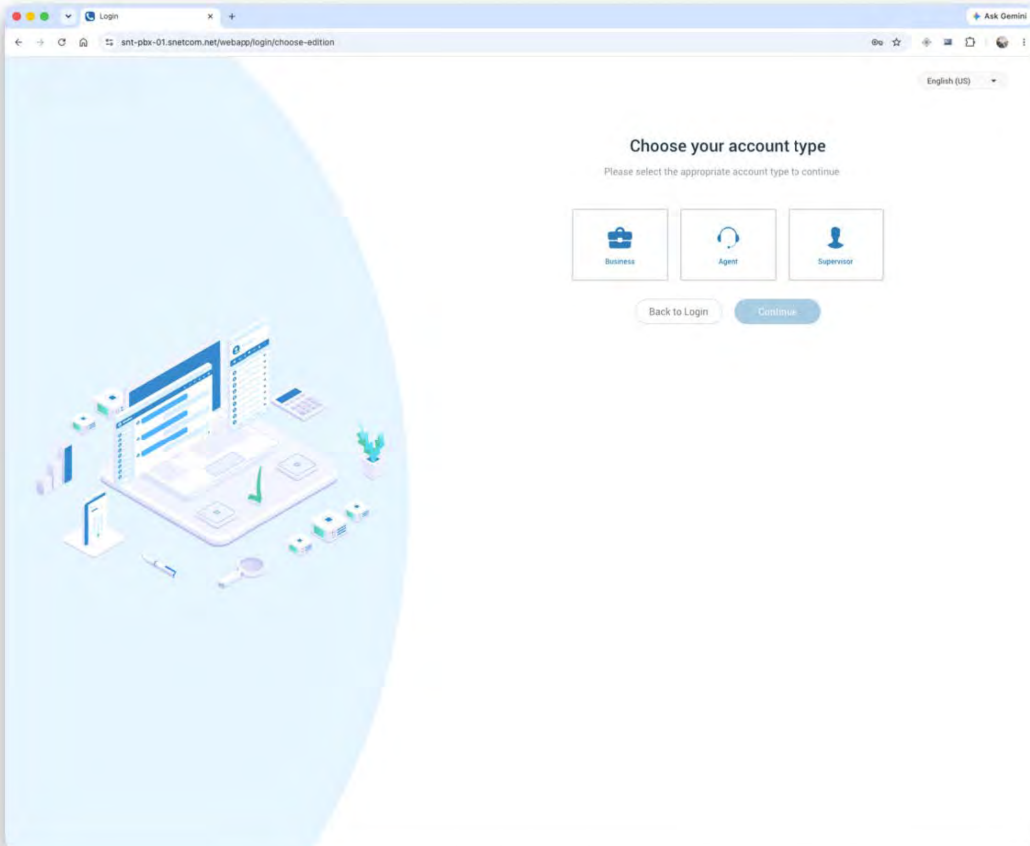
If your organization has Single Sign-On enabled, click the SSO Login tab and then click Sign in with Microsoft to authenticate using your existing Microsoft credentials. If you're not sure whether SSO applies to you, check with your IT administrator.

Language Options

In the top-right corner of the login page, you'll find a language selector. The app supports the following languages: Català, English (UK), English (US), Español, Français, Italiano, Nederlands, Português, and Português (Brasil). Select your preferred language before logging in.

Choosing Your Account Type

After logging in, you'll be prompted to select your account type. The options you see here are based on the licensing assigned to your account — most users will only have one option available.



Account type selection screen

Select your account type and click Continue. Here's a quick breakdown of what each option means:

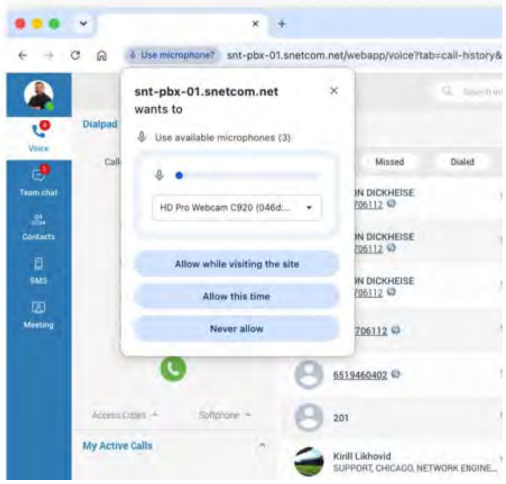
- **Business** — The standard account type for everyday users. Gives you access to calling, messaging, and all the core features of the EmpowerUC™ WebApp.
- **Agent** — Designed for contact center agents. In addition to the core features, Agent mode gives you access to OmniChannel Contact Center tools, including the ability to manage queues across voice, chat, SMS, and email channels. You'll also have a personal performance dashboard.
- **Supervisor** — Built for contact center supervisors. Everything in Agent mode, plus an expanded dashboard with visibility into your queues and performance reporting for the agents you supervise.

> 💡 **Note:** If you have access to Agent or Supervisor options but select Business, the contact center menus and features won't be visible after login. You can always log out and back in to choose a different account type if needed.

Browser Permissions

Allowing Microphone Access

The first time you open the EmpowerUC™ WebApp in a new browser, your browser will ask for permission to use your microphone. This is required to make and receive calls.



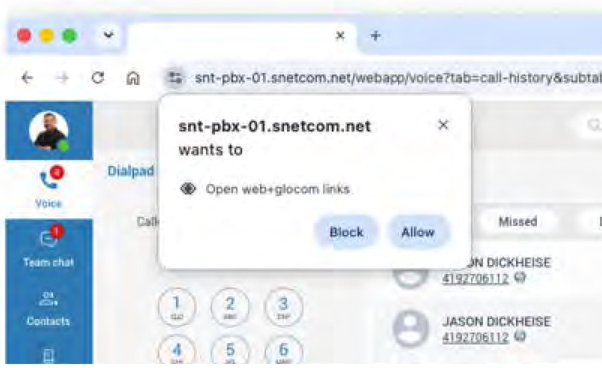
Browser microphone permission prompt

When the prompt appears, click Allow while visiting the site. This ensures the app has microphone access each time you visit without needing to re-approve it every session.

> 💡 **Note:** If you accidentally click Never allow or dismiss the prompt, you'll need to manually update your browser's microphone permissions for the site before calls will work. If you're unsure how to do that, reach out to your IT administrator or COEO support for assistance.

Allowing Protocol Handler Access (Chrome only)

If you're using Chrome, you may see a second browser prompt asking permission to "Open web+glocom links."



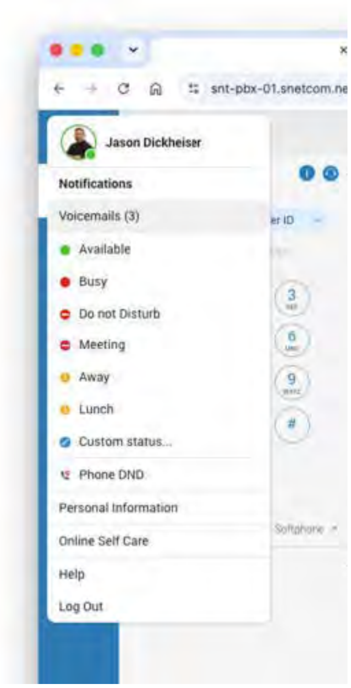
Chrome protocol handler permission prompt

Click Allow. This enables the app's Click to Dial feature, which lets you click on phone numbers to dial them directly from the app. This is a one-time prompt and you won't see it again on this browser.

> 💡 **Note:** If you click Block by mistake, Click to Dial won't work. To fix it, open Chrome Settings → Privacy and Security → Site Settings → Additional Permissions → Protocol Handlers, find your EmpowerUC™ URL, remove it, clear the site data, refresh the page, and click Allow when the prompt appears again.

Profile & Presence

Clicking your avatar in the top left of the app opens a menu where you can manage your presence, access account settings, and log out.

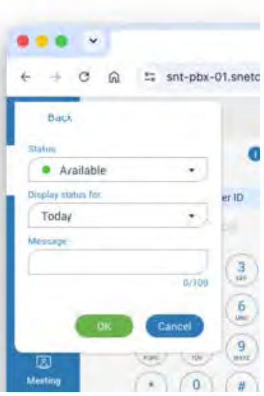


Profile menu

Presence Status

Seven standard statuses are available: Available (green), Busy (red), Do Not Disturb (red), Meeting (red), Away (yellow), Lunch (yellow), and Custom Status. Selecting any status immediately updates what colleagues see across the platform.

Custom Status



Custom status dialog

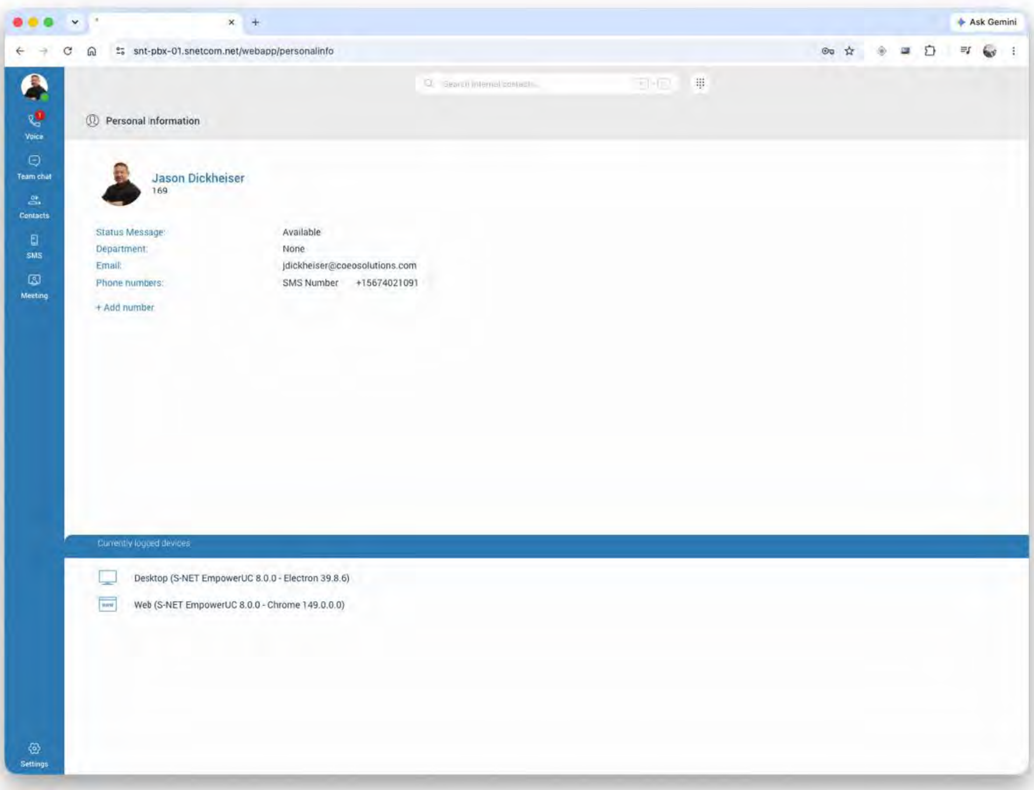
Custom Status lets you set a status (Available, Busy, Do Not Disturb, or Away), a display duration (Today, 1 hour, 4 hours, 8 hours, 12 hours, 2 days, 5 days, This week, or Always), and an optional message up to 100 characters. This is useful for letting colleagues know context — like "Away — back at 2pm."

Phone DND

Phone DND is a separate toggle from your presence status. When enabled, a red banner appears at the top of the app with a "Switch to available" button — making it very clear that DND is active and easy to turn off.

> 💡 **Note:** Phone DND and the presence-based Do Not Disturb status work differently. Phone DND actually stops inbound calls from ringing on your line entirely — no calls will come through. The presence-based Do Not Disturb status simply updates your visible status to let colleagues know you're unavailable, but calls will still ring through as normal. Use Phone DND when you genuinely cannot take calls.

Personal Information



Personal Information page

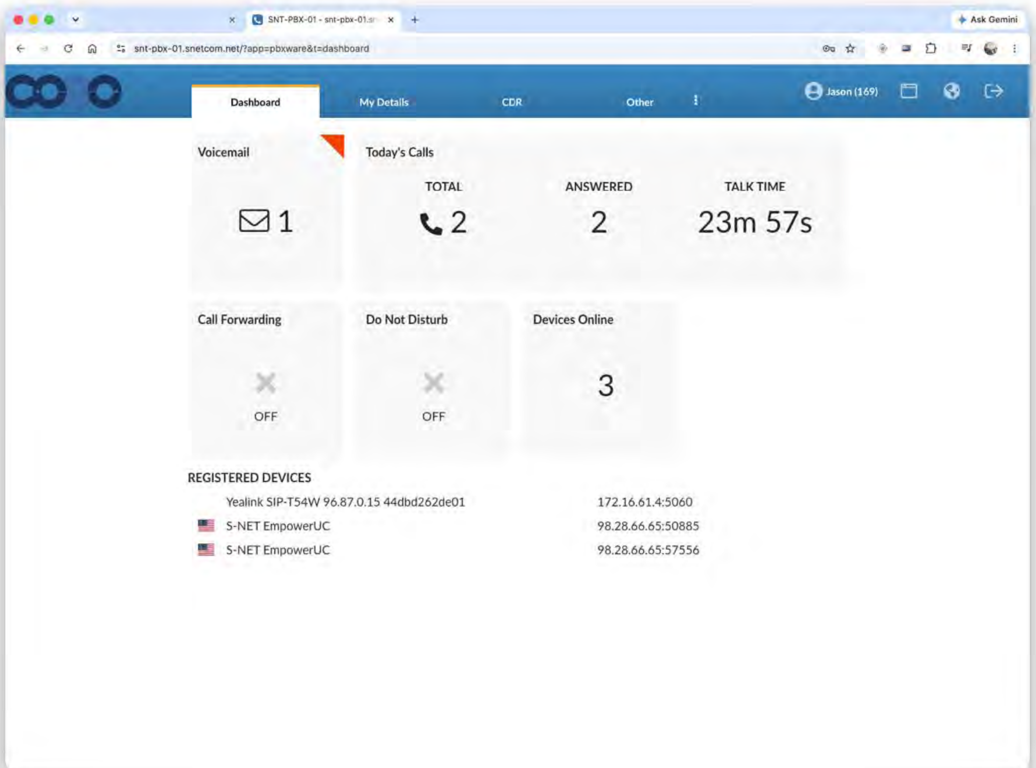
The Personal Information page shows your name, extension number, avatar, status message, department, email address, and associated phone numbers. At the bottom you'll see a list of currently logged-in devices.

> 💡 **Note:** If you see a device listed under "Currently logged devices" that you don't recognize, change your password immediately and contact COEO support.

Online Self Care

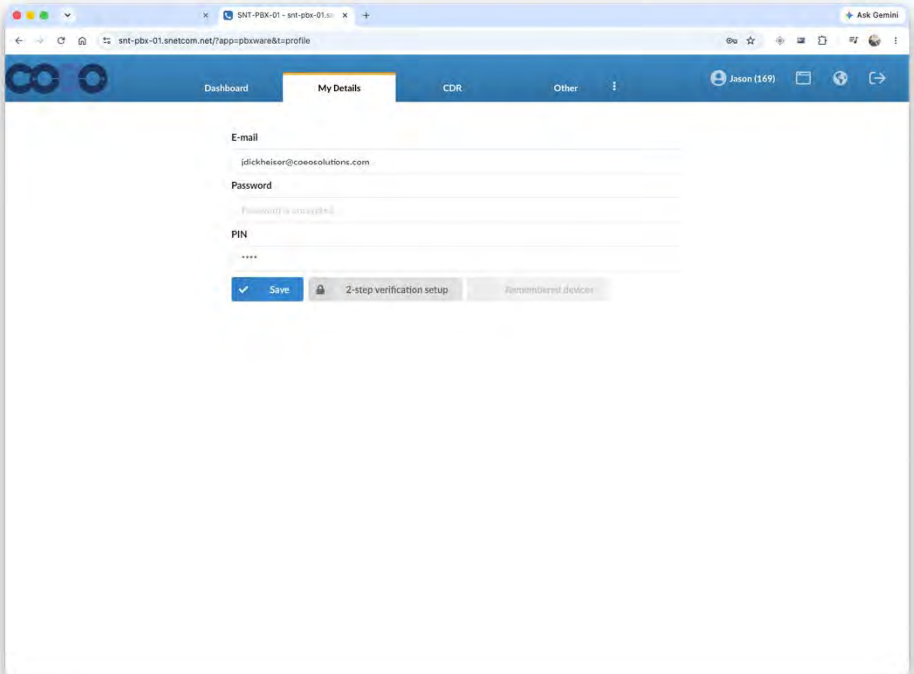
Online Self Care opens in a new browser tab and gives you a deeper view into your account. It has four sections:

- **Dashboard** — A snapshot of today's activity: voicemail count, total calls, answered calls, talk time, call forwarding status, DND status, devices online, and a list of all registered devices.



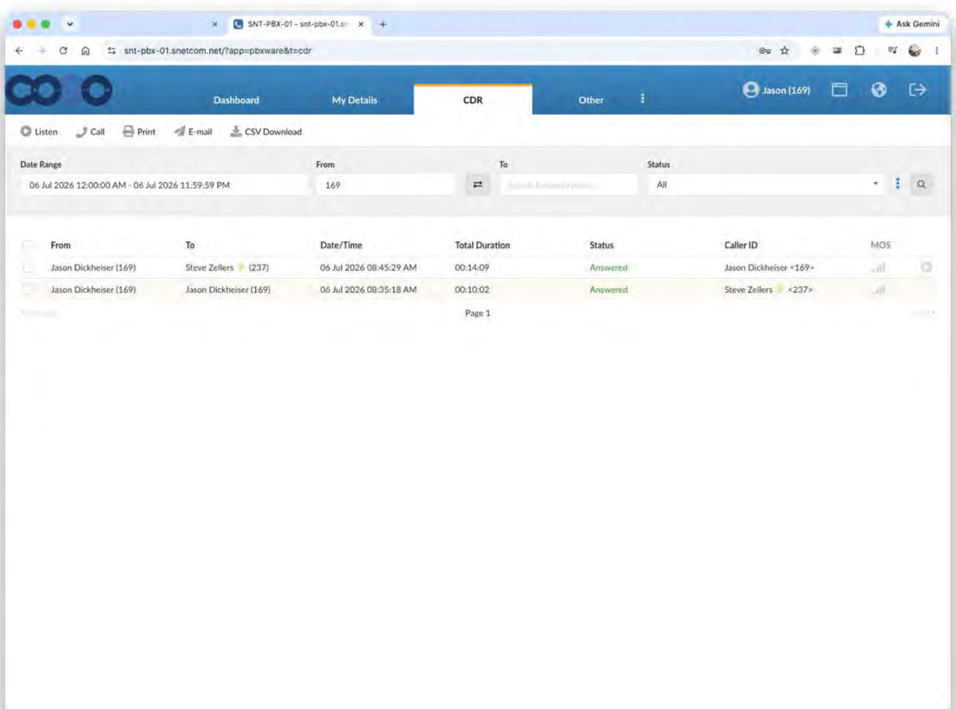
Online Self Care — My Details

- **My Details** — Update your email address, password, and PIN. Your PIN is used to authenticate for voicemail access and other services that require extension verification. You can also set up two-factor authentication (2FA) here using an authenticator app like Google Authenticator, and manage your remembered devices.



Online Self Care — CDR (Call Detail Records)

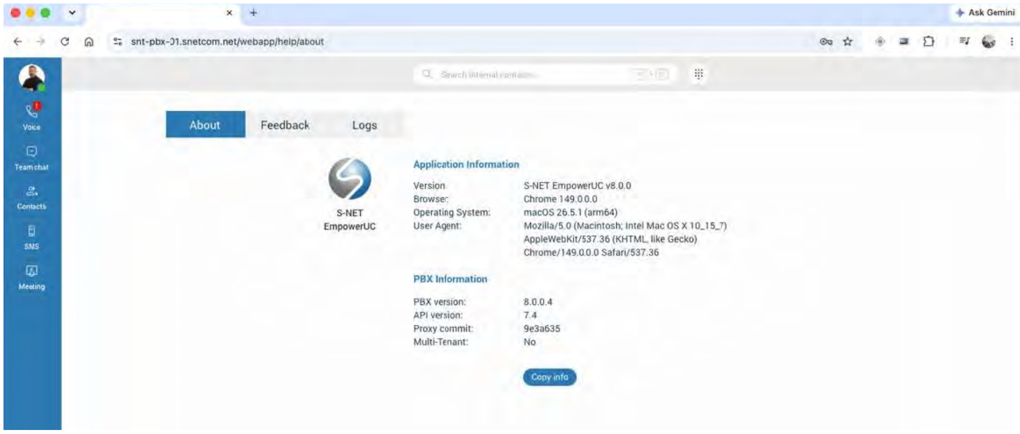
- **CDR (Call Detail Records)** — A detailed, filterable log of all your calls. Select a call record from the list first, then use the Listen, Call, Print, Email, or CSV Download options at the top to act on it.



Online Self Care — Other menu

- **Other** — Additional resources including your Directory, Meetings, Personal Phone Book, SMS Report, and Voicemail.

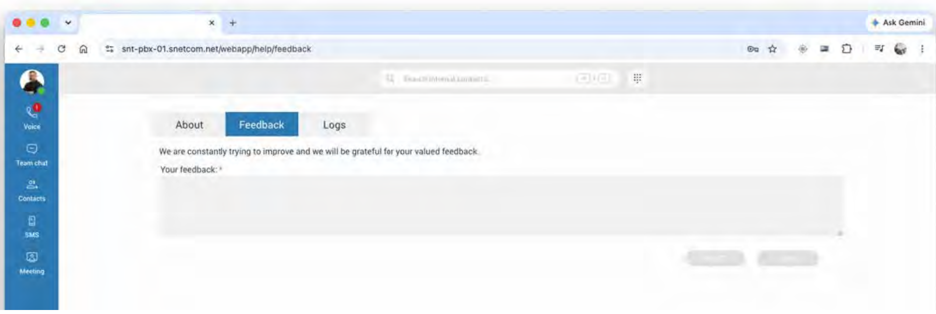
Help



Help — About page

The Help section has three tabs:

- **About** — Shows your app version, browser, and system information. Use the "Copy info" button when working with COEO support on a technical issue — it saves time. Note that this page displays the underlying application branding, which may differ from the COEO EmpowerUC™ branding you see elsewhere in the app.



Help — Feedback tab

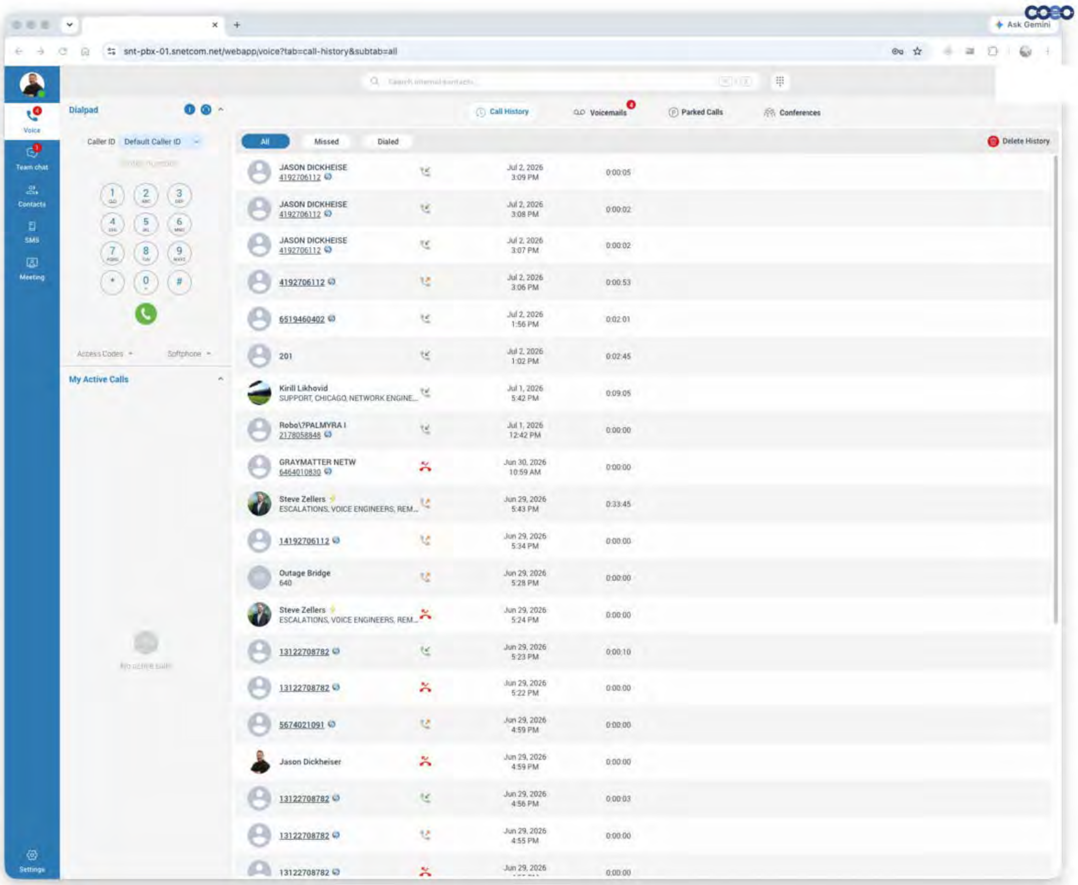
- **Feedback** — A text field to submit product enhancement ideas or feature requests. Note that this goes to the app's development platform, not COEO Support. For actual support issues, please contact COEO directly.
- **Logs** — Technical application logs used for troubleshooting. You won't need this in day-to-day use — if COEO support asks you to check here, they'll walk you through it.

Logging Out

Select Log Out from the profile menu to sign out of the app. Your session will end and you'll be returned to the login page.

Voice

The Voice section is your hub for all phone activity. Click Voice in the left navigation bar to access the dialpad, call history, voicemails, parked calls, and conferences.



The Voice section — main interface

The Dialpad

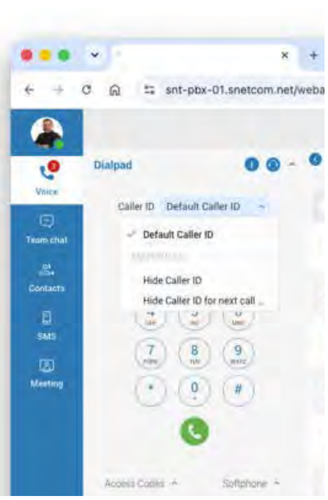
The dialpad sits on the left side of the Voice section. Use it to dial any extension or phone number manually. Type a number using the keypad or your keyboard, then press the green call button to dial. Use the back arrow (←) to correct a digit if you make a mistake while entering a number.

Above the dialpad you'll find two helpful indicators:

- **Extension & Softphone status** — Hover over the info icon (ⓘ) next to "Dialpad" to see your extension number and whether your softphone is online.

Extension and softphone status tooltip

Caller ID

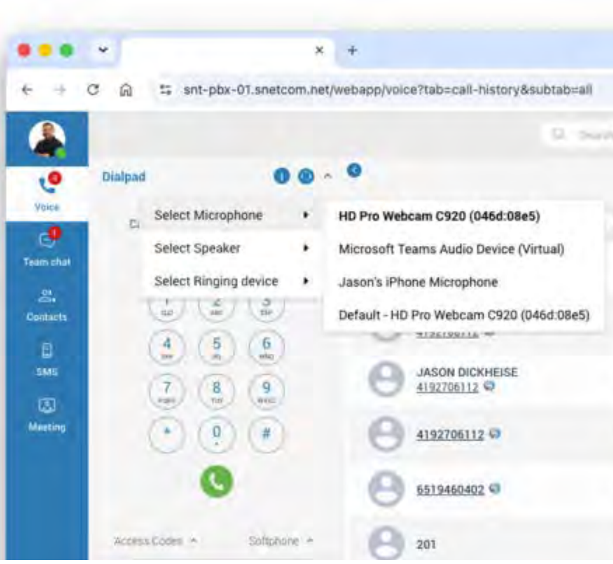


Caller ID dropdown options

The Caller ID dropdown at the top of the dialpad controls what number is displayed to the person you're calling. Options include:

- **Default Caller ID** — Sends your standard outbound caller ID.
- **Anonymous** — Hides your caller ID from the recipient entirely.
- **Hide Caller ID** — Suppresses your caller ID for all calls until you change it back.
- **Hide Caller ID for next call only** — Suppresses your caller ID for a single call, then reverts to your default.

Audio Device Selection



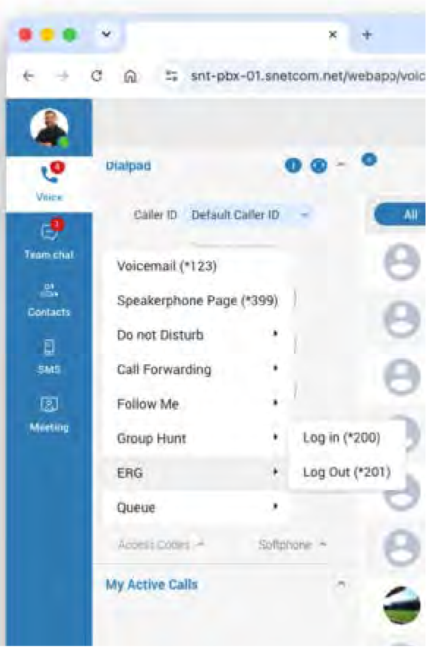
Audio device selection menu

Click the headset icon near the top of the dialpad to select your audio devices. You can choose your preferred microphone, speaker, and ringing device independently — useful if you want your ringtone to play through a different speaker than your call audio.

Softphone Selector

The Softphone dropdown at the bottom of the dialpad lets you choose which device handles your calls. Options include Softphone (your browser), Deskphone, and Mobile App. Calls made by clicking numbers in your call history will dial using whichever device is selected here.

Access Codes



Access Codes menu

The Access Codes dropdown provides quick access to common telephony features:

- **Voicemail (*123)** — Dials directly into your voicemail.
- **Speakerphone Page (*399)** — Pages all phones on the speakerphone.
- **Do Not Disturb** — Toggles DND on or off for your extension.
- **Call Forwarding** — Enables or disables call forwarding for your line.
- **Follow Me** — Enables or disables Follow Me, which rings multiple numbers simultaneously or in sequence when someone calls you.
- **Group Hunt** — Enables or disables your participation in a Hunt Group, which distributes incoming calls across a group of extensions.
- **ERG (Enhanced Ring Group)** — Log in or out of an Enhanced Ring Group. ERGs work like a lightweight call center, queuing calls across a group of extensions. This option only appears if you're assigned to an ERG.
- **Queue** — Log in or out of a call queue. This option only appears if you're assigned to a queue.

> 💡 **Note:** All changes made through Access Codes take effect immediately. Toggle them back the same way to turn them off.

Making Calls

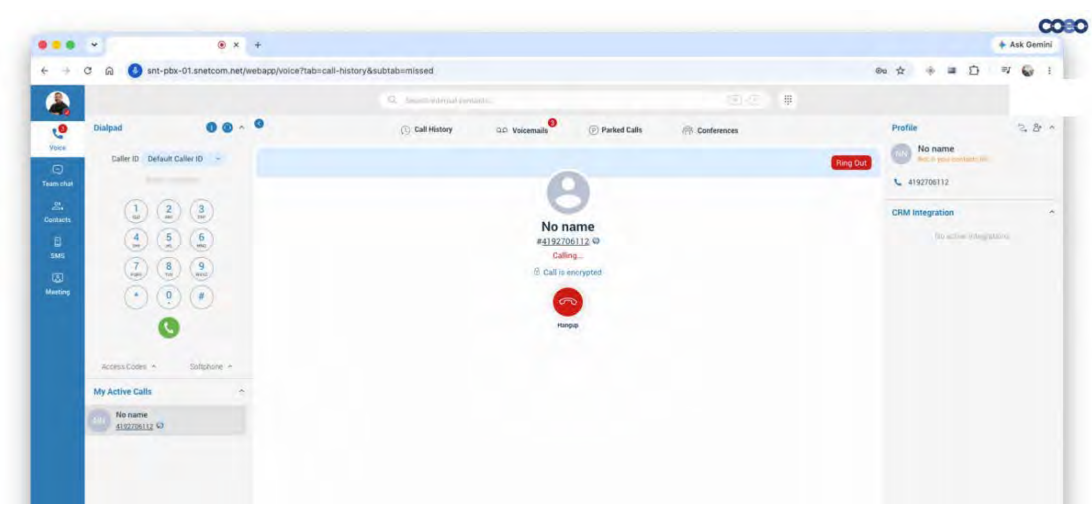
Dialing from the Dialpad

Enter the number or extension using the keypad, then press the green call button. The call will initiate immediately on your selected Softphone device.

Calling from Call History

Click any phone number in your call history and the call will begin immediately using your selected Softphone device. There is no confirmation step — the call starts as soon as you click.

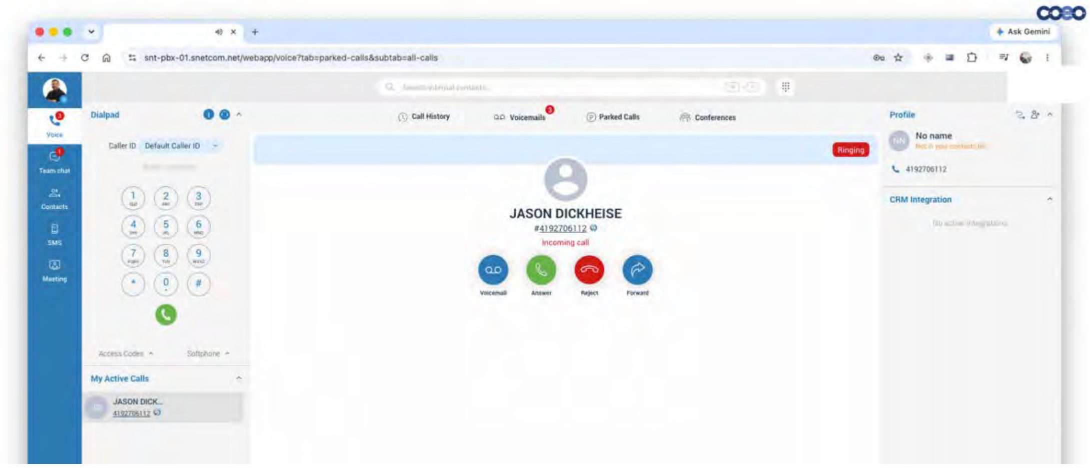
Outbound Call in Progress



Outbound call — ringing state

While your call is connecting, the screen shows "Ring Out" and "Calling..." with only a Hangup button available. Once the other party answers, the full call controls appear.

Receiving Calls



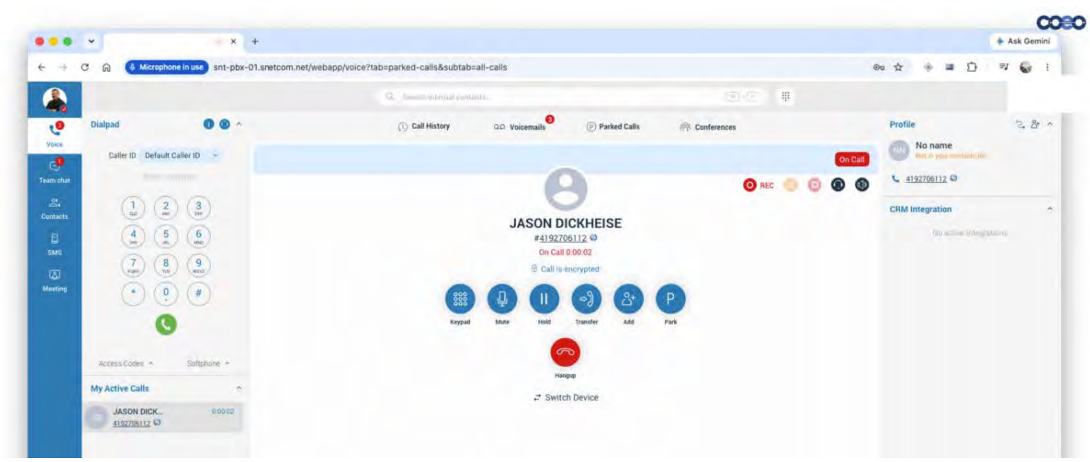
Incoming call screen

When a call comes in, the screen shows the caller's name (if available), their number, and four options:

- **Voicemail** — Send the caller directly to your voicemail.
- **Answer** — Accept the call.
- **Reject** — Decline the call.
- **Forward** — Forward the call to another number or extension.

The caller also appears in the My Active Calls panel in the lower left.

During a Call



Active call screen with call controls

Once a call is connected, the screen shows the call duration and "Call is encrypted," confirming the call is secure. The call controls are:

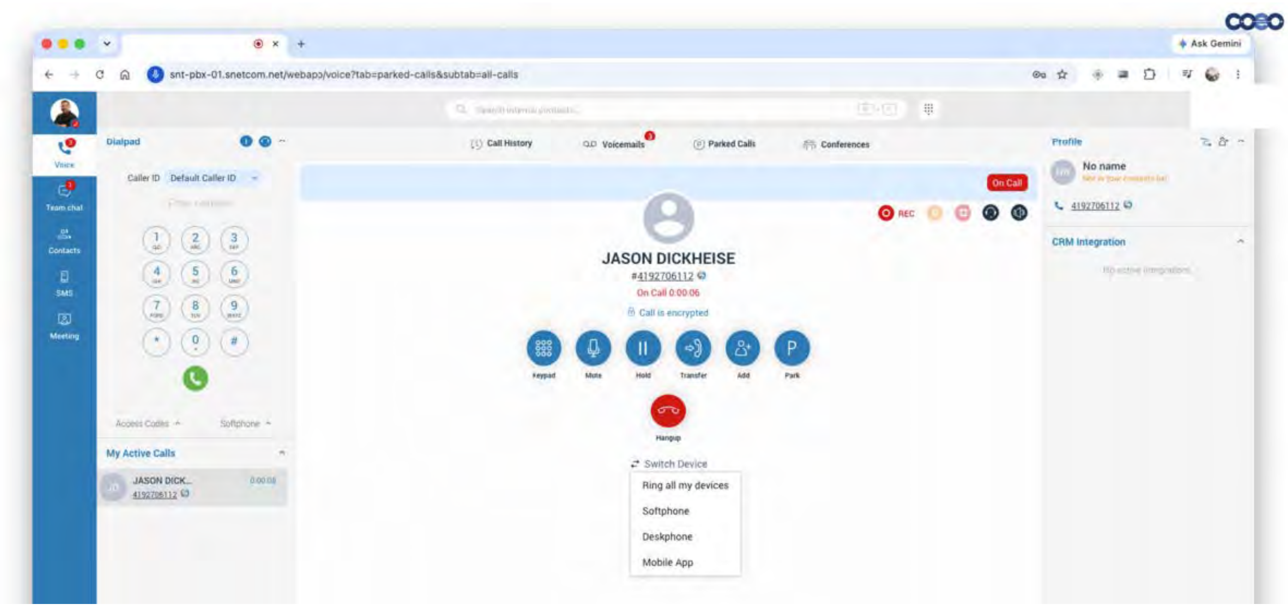
- **Keypad** — Opens the dialpad during a call for entering IVR menu options or extension numbers.
- **Mute** — Mutes your microphone. The other party can no longer hear you.
- **Hold** — Places the call on hold. The caller will hear hold music.
- **Transfer** — Transfer the call to another person (see Transferring Calls below).
- **Add** — Adds another participant to create a multi-party call.

- **Park** — Parks the call in a parking lot so it can be picked up from any extension (see Call Parking below).
- **Hangup** — Ends the call.
- **Switch Device** — Moves the active call to a different device (Softphone, Deskphone, or Mobile App) mid-call.

Additional controls appear in the top-right of the call screen when enabled on your extension:

- **REC** — Start call recording. Appears only when recording is enabled for your extension by an administrator.
- **Pause/Stop recording** — Pause or stop an active recording.
- **Audio device** — Switch your audio input/output device during the call.
- **Volume** — Adjust your call volume.

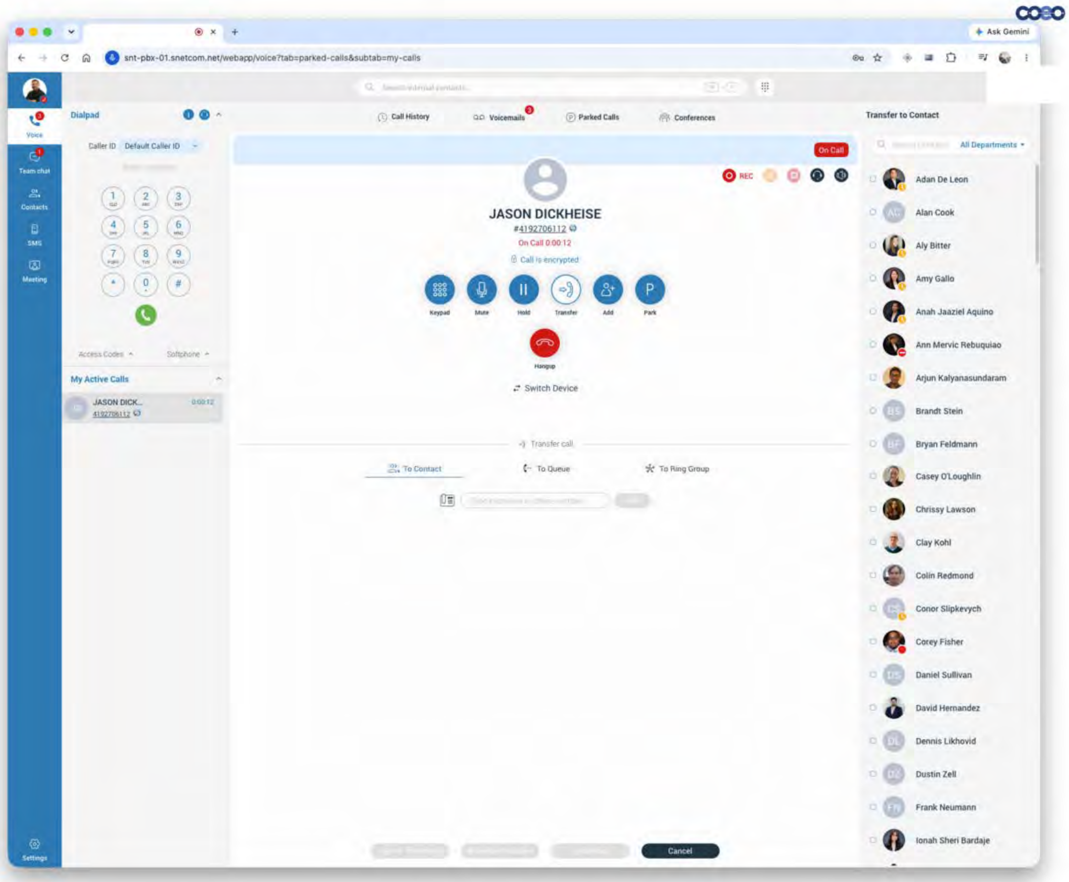
Switching Devices During a Call



Switch Device options during an active call

Click Switch Device to move a live call to a different device without interrupting the conversation. Options include Ring all my devices, Softphone, Deskphone, and Mobile App.

Transferring Calls



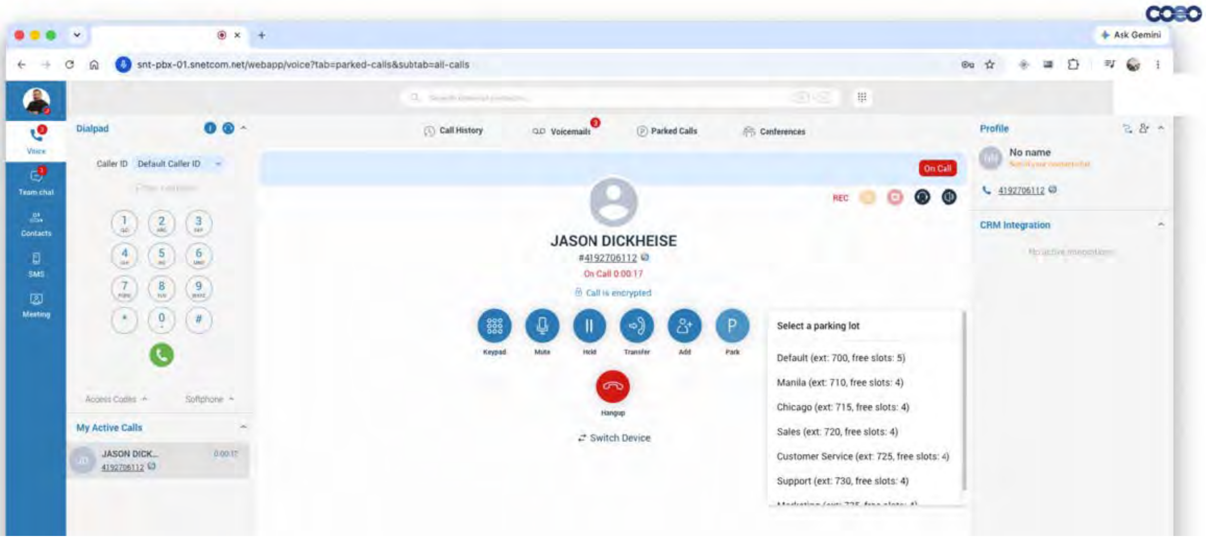
Transfer screen with To Contact, To Queue, and To Ring Group tabs

Click Transfer during an active call to open the transfer screen. You can transfer to a Contact, a Queue, or a Ring Group. At the bottom of the screen you'll find three transfer options:

- **Blind Transfer** — Immediately transfers the call to the selected number or extension. The original caller is connected to the new party and you're removed from the call.
- **Attended Transfer** — Places the original caller on hold, calls the new party so you can provide context before completing the transfer, then requires you to click Transfer again to connect them. Use this when you want to introduce the caller or confirm the other party is available.
- **Voicemail** — Transfers the caller directly to the voicemail of the selected extension.

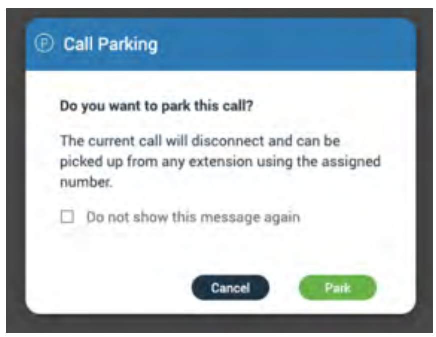
Call Parking

Call parking lets you "park" a call so it can be picked up from any extension — great for transferring calls to someone who's away from their desk.



Parking lot selection

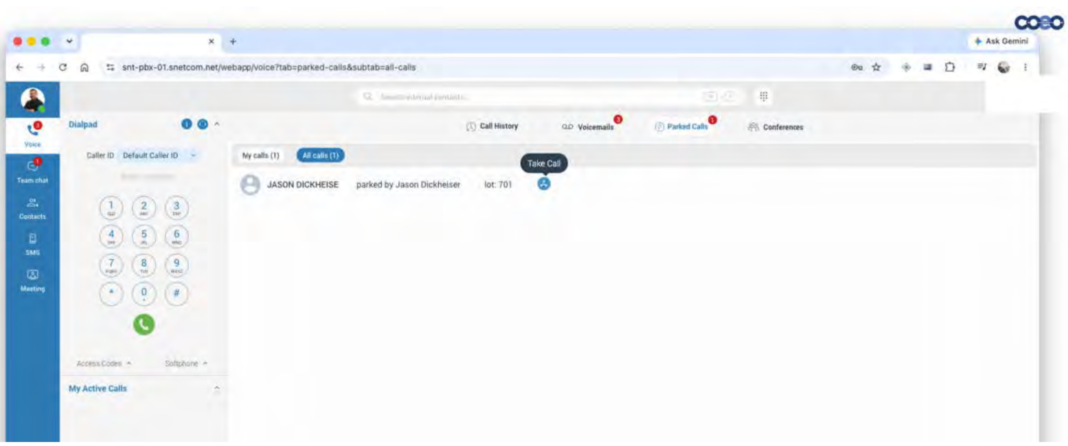
Click Park during an active call, then select a parking lot from the list. Each lot shows its extension number and how many free slots are available.



Call parking confirmation dialog

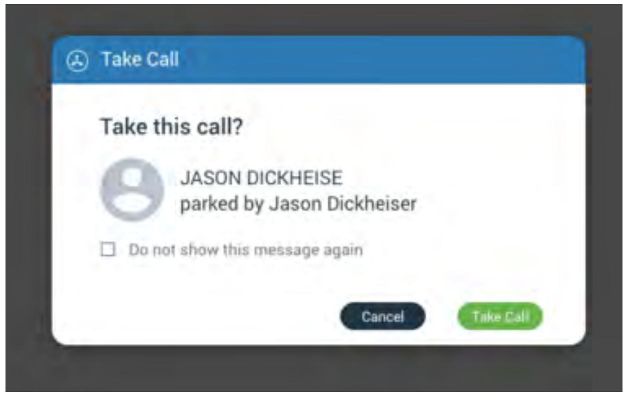
A confirmation dialog appears. Click Park to confirm. You can check "Do not show this message again" to skip the confirmation in the future.

Picking Up a Parked Call



Parked Calls tab showing a parked call

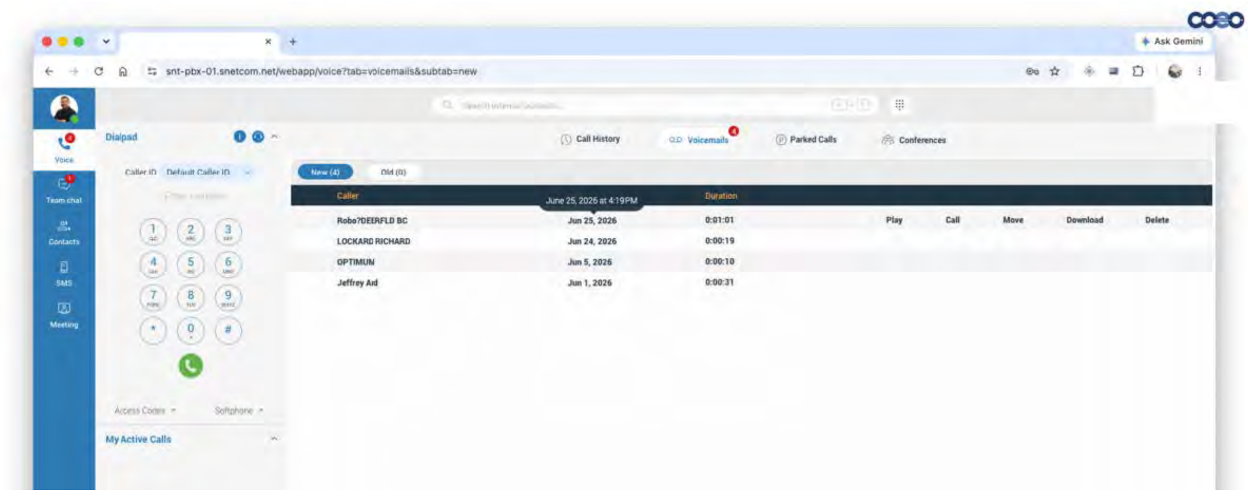
Click the Parked Calls tab at the top of the Voice section to see all currently parked calls. Both "My calls" (calls you parked) and "All calls" (calls parked by anyone) are visible. Hover over a parked call and click Take Call.



Take Call confirmation dialog

Confirm by clicking Take Call in the dialog that appears. The call will connect to your line.

Voicemail



Voicemails — New tab

Click the Voicemails tab at the top of the Voice section to manage your messages. Voicemails are split into two tabs:

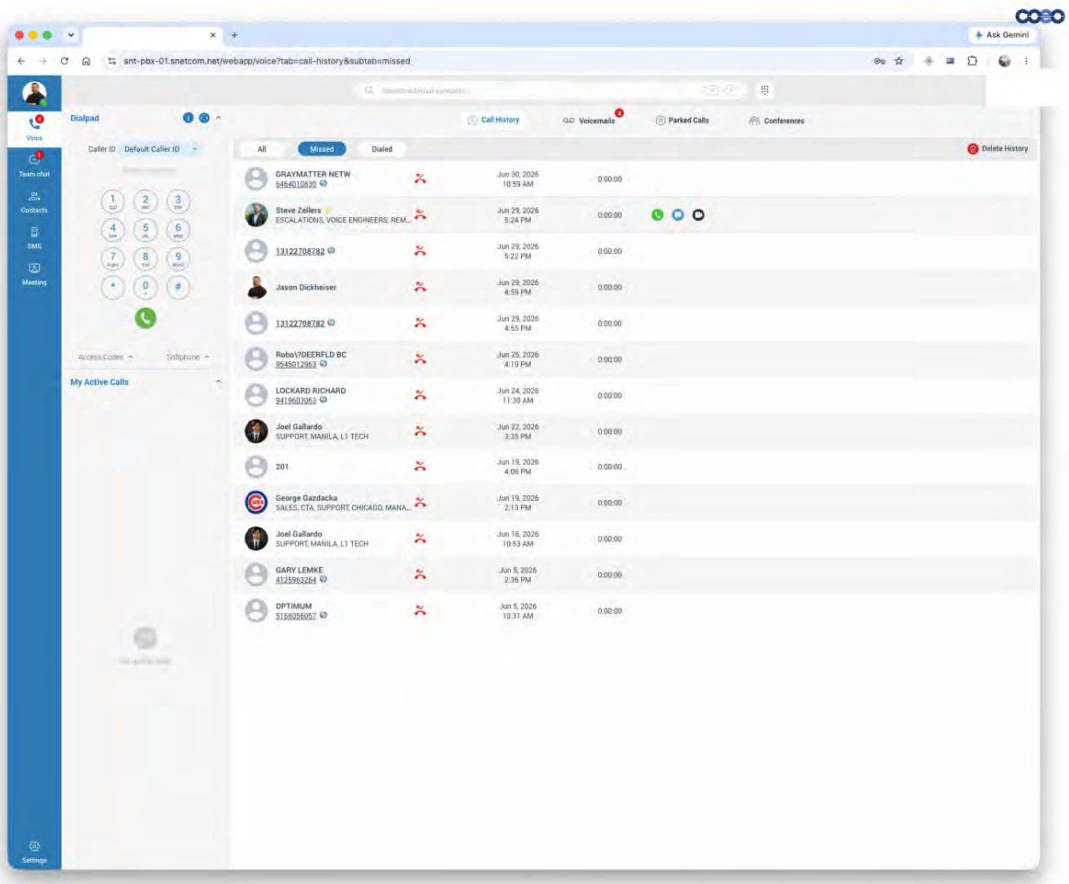
- **New** — Unheard voicemails, shown with the caller name, date, and duration.
- **Old** — Previously listened-to voicemails.

For each voicemail, you have the following options:

- **Play** — Listen to the voicemail in the app.
- **Call** — Call the person back immediately.
- **Move** — Move the message between New and Old folders.
- **Download** — Save the voicemail recording to your device.
- **Delete** — Remove the voicemail permanently.

Call History

The Call History tab is the default view when you open the Voice section. It shows all your recent calls — all, missed, or dialed — with the caller's name or number, direction, date, time, and duration.



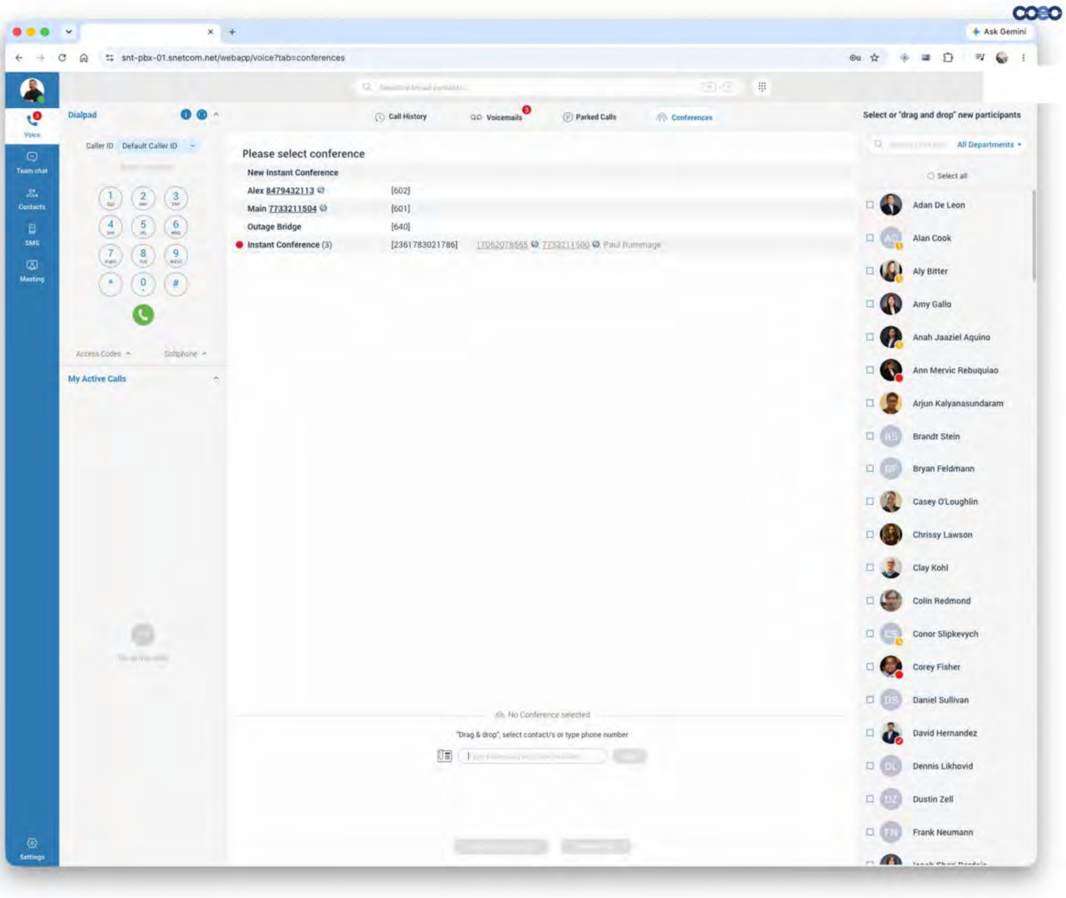
Missed Calls tab with hover actions visible

Hover over any call record to reveal quick-action icons:

- **Call Back (green)** — Immediately dials the number.
- **Chat (blue)** — Opens a Team Chat conversation with this person. Only active for internal users on the same platform — greyed out for external callers.
- **Meeting (dark)** — Starts a meeting with this person. Only active for internal users — greyed out for external callers.

Click Delete History in the top-right corner to clear your entire call history.

Conferences



Conferences tab

The Conferences tab lets you start or join audio conference bridges. You'll see two types of conferences:

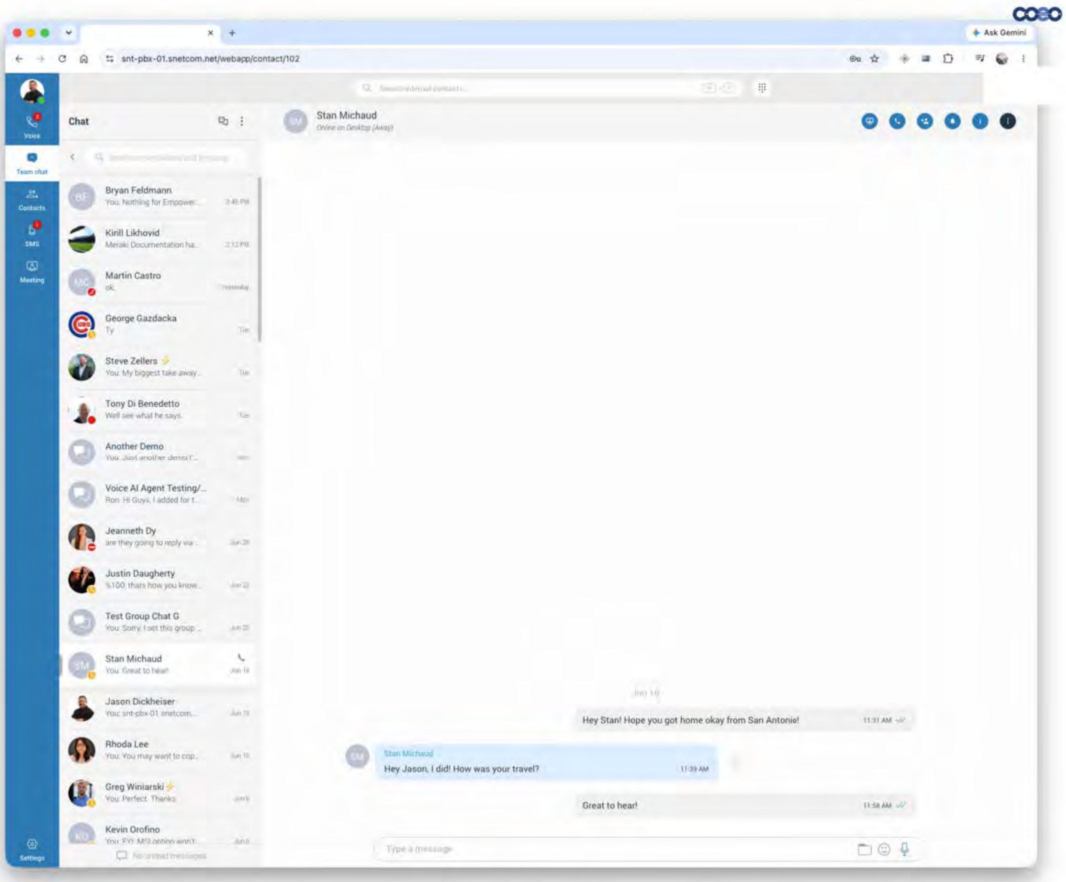
- **Static conference bridges** — Pre-configured bridges assigned to your account (such as a team or department bridge). These are set up by your administrator.
- **New Instant Conference** — A conference you create on the fly.

To start or join a conference, select it from the list. To add participants, drag and drop contacts from the panel on the right, or type an extension or phone number in the field at the bottom and click Add. Click Start conference when ready.

> **Note:** The conference bridges available to you depend on what has been configured and assigned to your account by your administrator.

Team Chat

Team Chat lets you send instant messages, share files, and collaborate with colleagues directly within EmpowerUC™. All chats are internal — you can only message other users on your organization's EmpowerUC™ platform.



Team Chat main view

Starting a Conversation

Click Team Chat in the left navigation bar to open the chat panel. Your existing conversations are listed on the left. To start a new chat, use the search bar at the top of the chat list to find a contact by name or phone number, then click the chat icon next to their name in the results.

Inside a Conversation

When you open a chat, the contact's name and current presence status are shown at the top, including which device they're on (Desktop, Mobile, or Web). The message compose area at the bottom lets you:

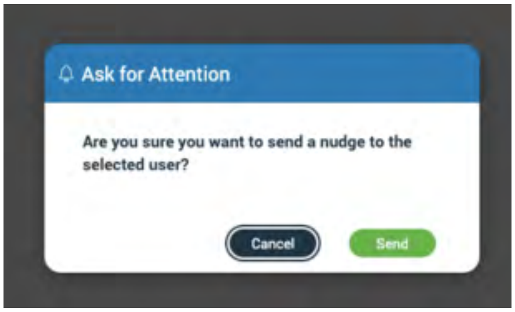
- **Type a message** — Click the text field and start typing.
- **Attach a file** — Click the folder icon to attach and send a file.
- **Add an emoji** — Click the emoji icon to insert an emoji.
- **Send a voice memo** — Click the microphone icon to record and send a voice message.

Use @mentions by typing @ in the message field to tag a specific person — handy in group chats to make sure someone sees your message.

Contact Action Icons

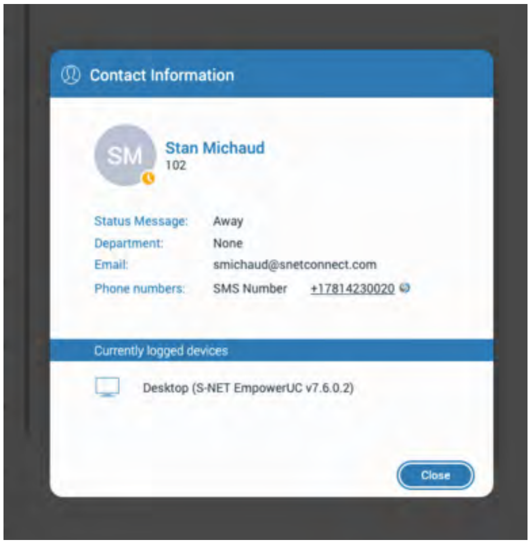
Along the top right of any open conversation, you'll find a row of quick-action icons:

- **Video/Meeting** — Start an instant meeting with this contact.
- **Phone Call** — Call the contact directly.
- **Create Group Chat** — Creates a new group chat with the current contact already added, then lets you select additional members, name the group, and set sharing options.
- **Ask for Attention** — Sends a nudge notification to the contact.



Ask for Attention confirmation dialog

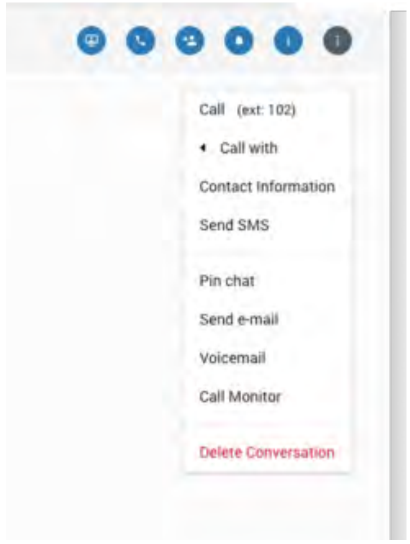
- **Contact Information** — Opens a panel showing the contact's extension, status, department, email, phone numbers, and currently logged devices.



Contact Information modal

- **... (More Options)** — Opens an additional menu.

More Options Menu

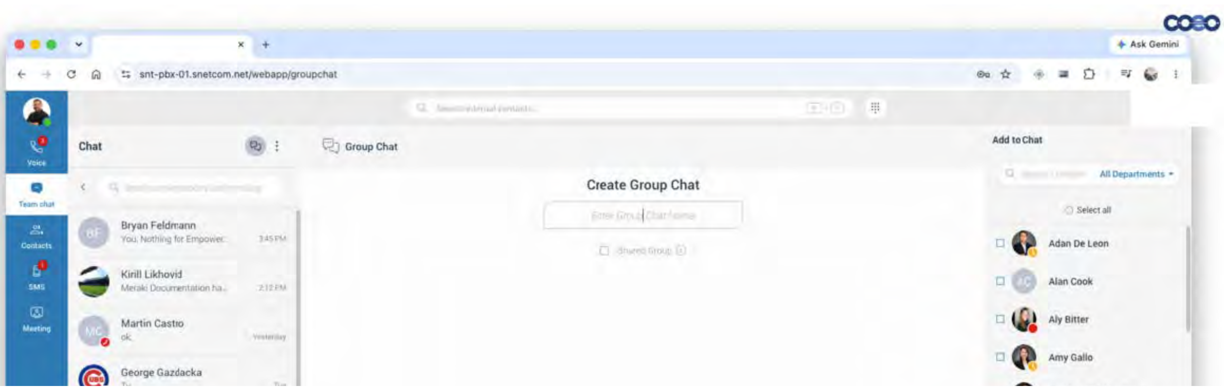


More options menu in a conversation

The "..." menu gives you access to:

- **Call (ext: XXX)** — Call the contact's extension directly.
- **Call with** — Choose to call via Softphone or Deskphone.
- **Contact Information** — Same as the info icon above.
- **Send SMS** — Send an SMS to this contact.
- **Pin chat** — Pins the conversation to the top of your chat list. Pinned chats display a pin indicator in the list.
- **Send e-mail** — Opens your default email client to email the contact.
- **Voicemail** — Leave a voicemail for the contact.
- **Delete Conversation** — Permanently removes the conversation from your list.

Creating a Group Chat



Create Group Chat screen

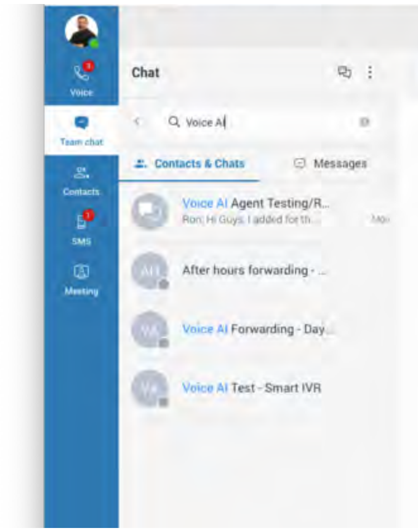
Click the group chat icon at the top of the chat panel (or use Create Group Chat from within a conversation). Give the group a name, optionally check Shared Group so that chat history is visible to anyone added to the group in the future, then select participants from the contact list on the right or drag and drop them in. Click Create Group when ready.

Chat List Options

The "..." next to the Chat header gives you three options:

- **Show closed chats** — Reveals any conversations you've previously closed.
- **Close all chats** — Collapses all open conversations.
- **Re-sync the entire chat history** — Refreshes your chat history if something looks out of sync.

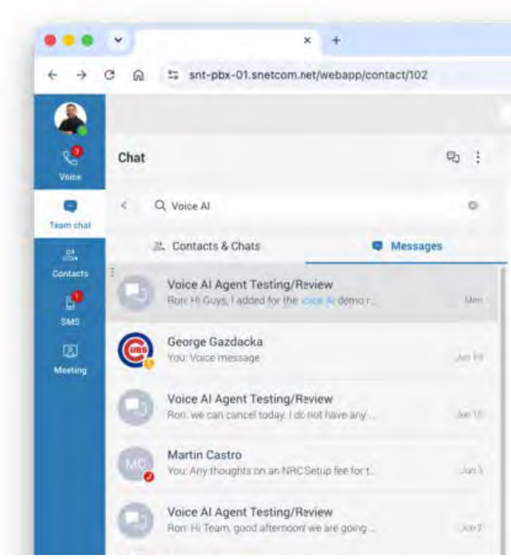
Searching Chat



Search results — Contacts & Chats tab

Use the search bar at the top of the chat list to search across your conversations. Results are split into two tabs:

- **Contacts & Chats** — Finds people and conversations by name.



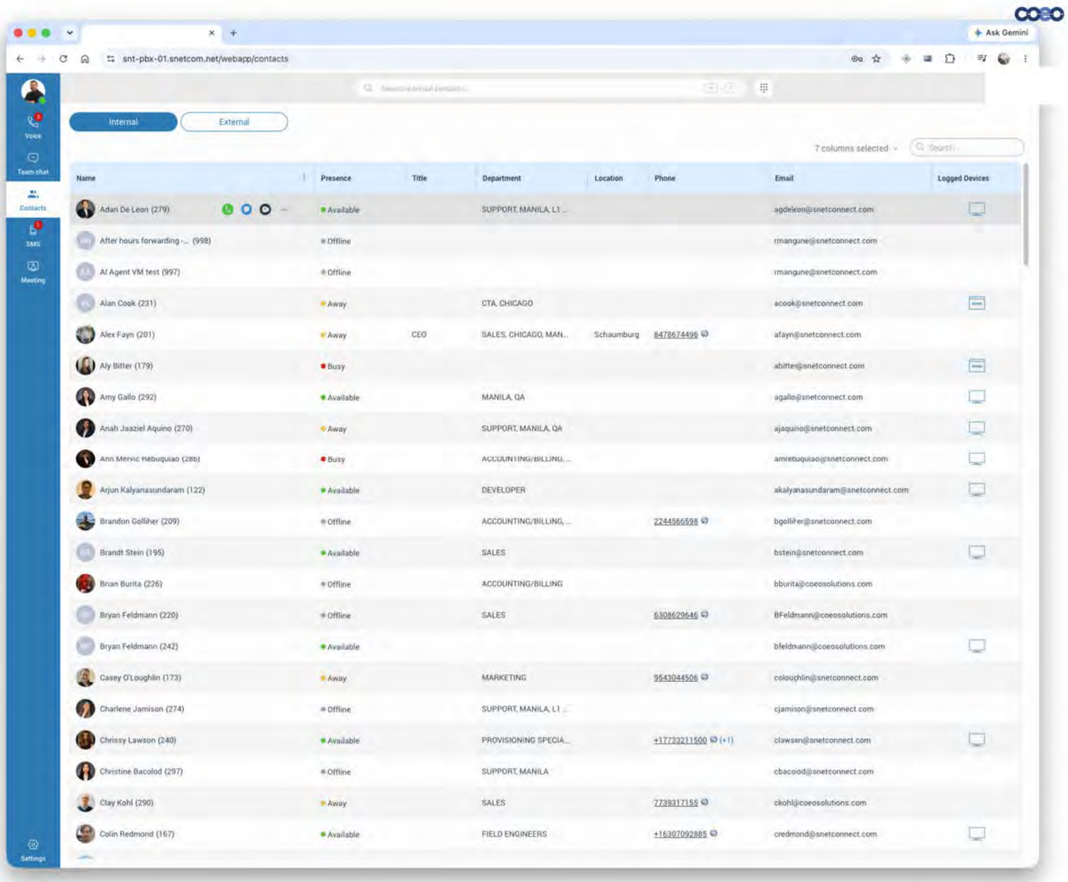
Search results — Messages tab

- **Messages** — Finds specific messages across all conversations, with the search term highlighted in context.

Contacts

The Contacts section gives you a directory of everyone you can reach — both your internal colleagues and any external contacts stored in the system. Click Contacts in the left navigation bar to get started.

Internal Contacts

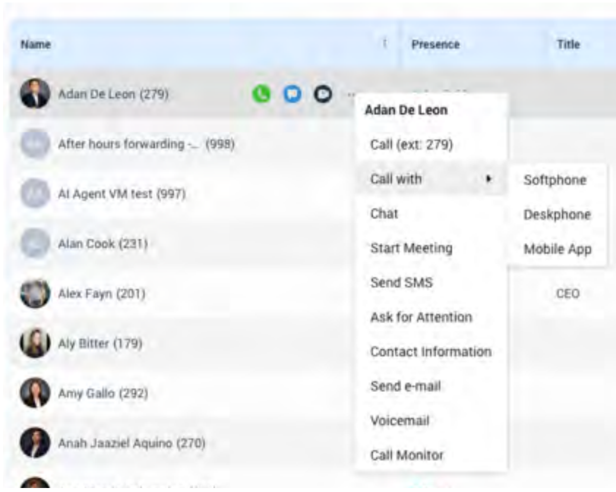


Internal Contacts list

The Internal tab shows all users on your EmpowerUC™ platform. Each entry displays the user's name and extension number alongside their current presence status, title, department, location, phone, email, and which devices they're currently logged into.

You can customize which columns are visible using the column selector in the top right. Click any column header to sort the list.

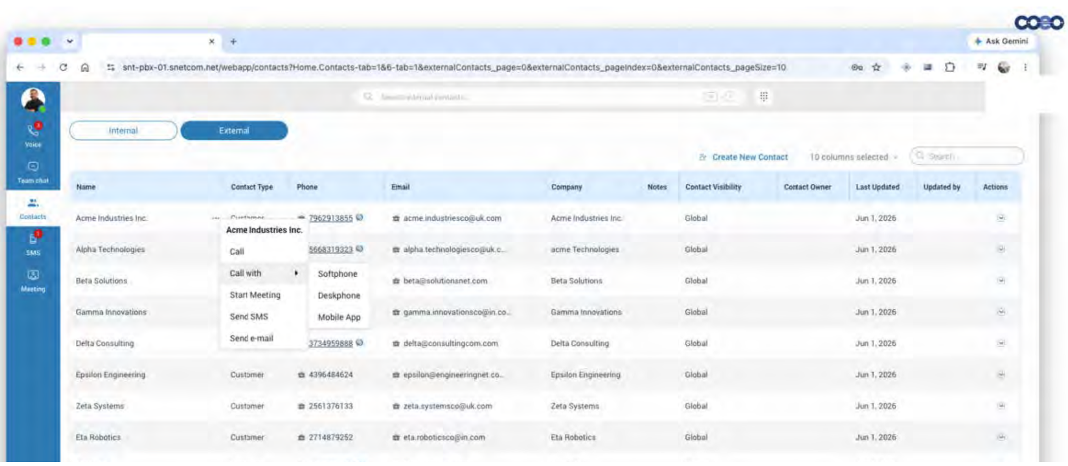
Hovering over a contact reveals quick-action icons — Chat, Start Meeting, Send SMS — and a "..." menu with the full range of options:



Internal contact hover menu with Call with submenu

- **Call (ext)** — Calls the contact's extension directly.
- **Call with** — Choose Softphone, Deskphone, or Mobile App for the call.
- **Chat** — Open a Team Chat conversation.
- **Start Meeting** — Launch an instant meeting with this contact.
- **Send SMS** — Send an SMS to this contact.
- **Ask for Attention** — Send a nudge notification.
- **Contact Information** — View full contact details.
- **Send e-mail** — Open your email client to email this contact.
- **Voicemail** — Leave a voicemail.

External Contacts

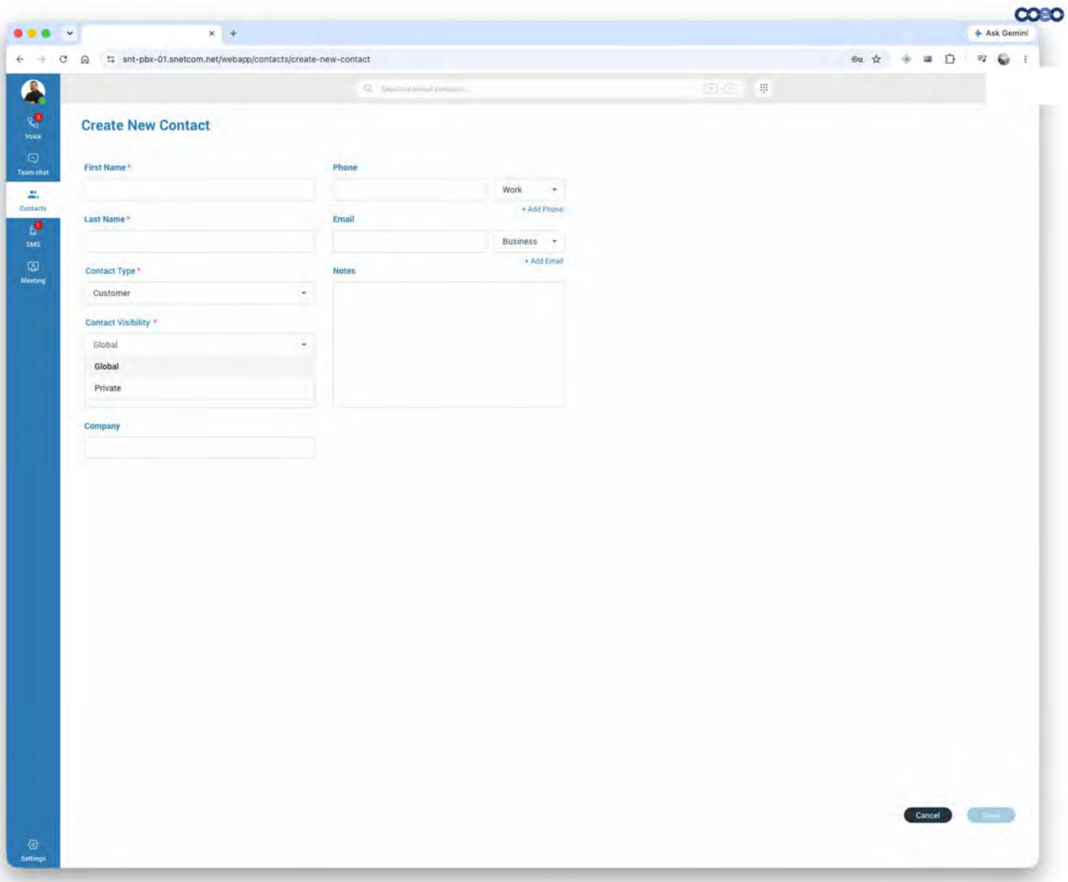


External Contacts list

The External tab shows contacts that have been added manually — customers, leads, vendors, or anyone outside your organization. The columns here differ slightly from Internal, showing Contact Type, Company, Notes, Contact Visibility, Contact Owner, Last Updated, and Updated by in addition to the standard name, phone, and email fields.

Hovering an external contact reveals a "..." menu with Call, Call with (Softphone, Deskphone, Mobile App), Start Meeting, Send SMS, and Send e-mail options. The Actions dropdown on the right lets you View/Edit the contact record.

Creating a New Contact



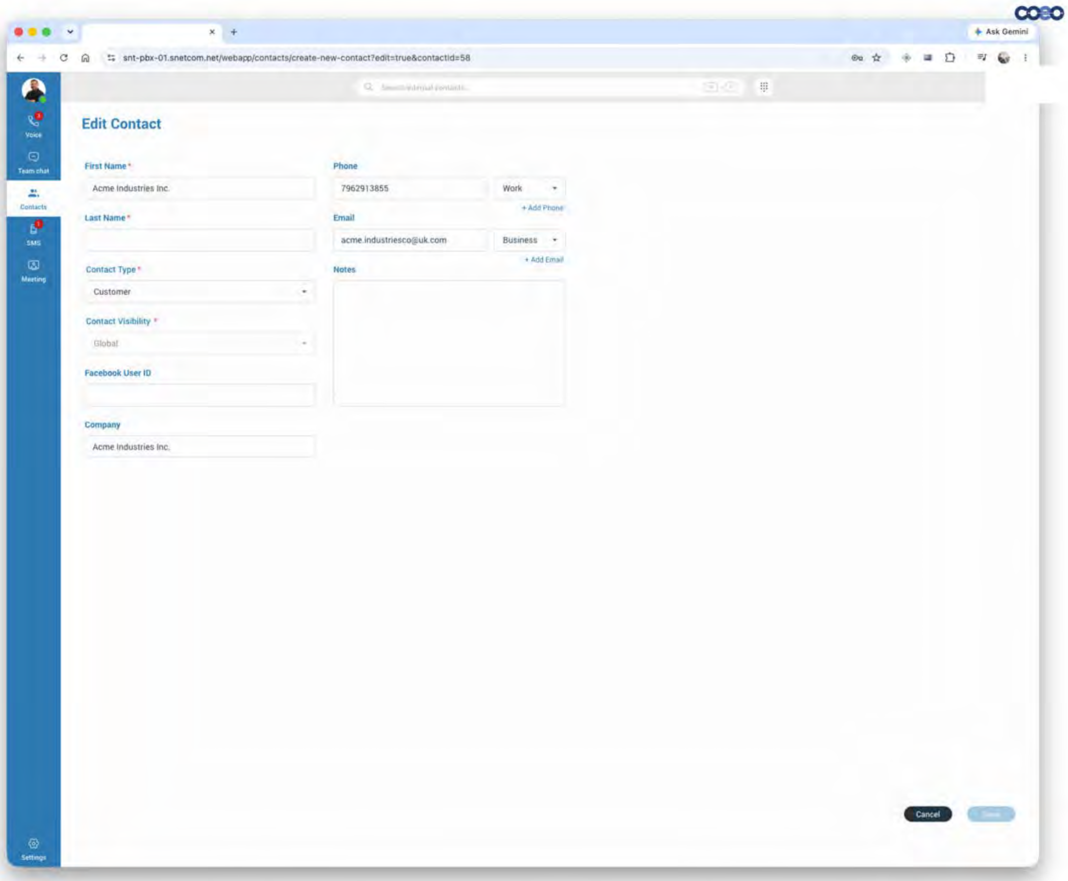
Create New Contact form

Click Create New Contact in the top right of the External tab to add a new external contact. First Name and Last Name are required — everything else is optional but recommended:

- **Contact Type** — Customer or Lead.
- **Contact Visibility** — Global (visible to all users on the platform) or Private (only visible to you).
- **Phone** — Add one or more phone numbers with a type label (Work, etc.).
- **Email** — Add one or more email addresses with a type label (Business, etc.).
- **Facebook User ID, Company, Notes** — Additional context fields.

Click Save when done.

Editing a Contact



Edit Contact form

To edit an existing external contact, hover over the contact row and click the Actions dropdown on the right, then select View/Edit. The same form opens with all fields pre-populated and ready to update. Click Save to apply your changes.

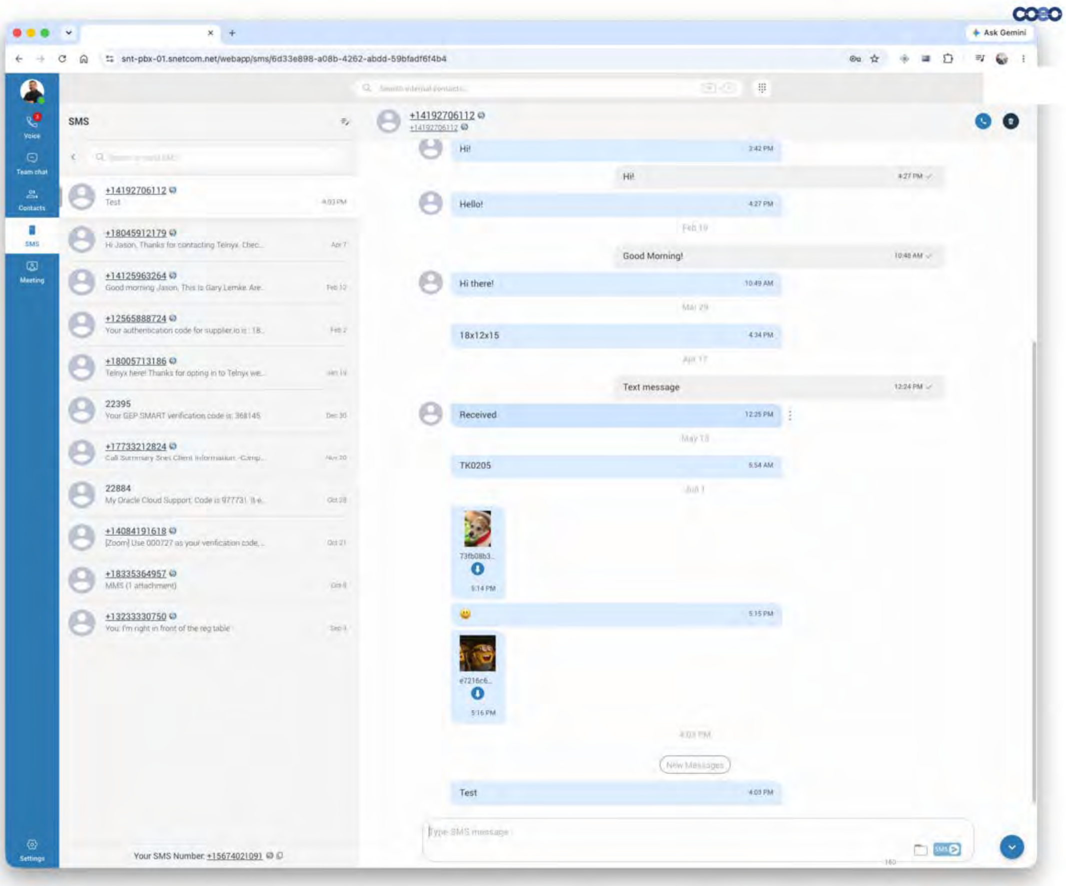
Searching Contacts

Use the Search bar in the top right of either tab to quickly find a contact by name.

SMS

💡 **Note:** SMS must be enabled on your line before this feature is available. To have SMS enabled, contact your COEO Account Manager or Client Technology Advisor (CTA).

The SMS section lets you send and receive text messages directly from the EmpowerUC™ WebApp using your business phone number. Click SMS in the left navigation bar to get started.

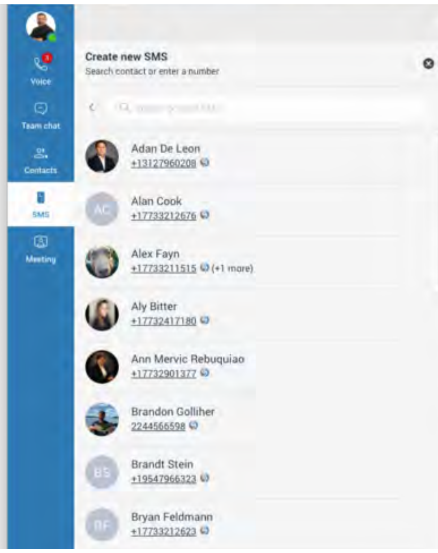


SMS main view with conversation open

Your SMS Number

Your assigned SMS number is displayed at the bottom of the conversation list for reference. Clicking your SMS number copies it to your clipboard — a green "SMS Number Copied!" confirmation appears in the top right corner of the screen when this happens.

Starting a New SMS Conversation



New SMS — contact picker

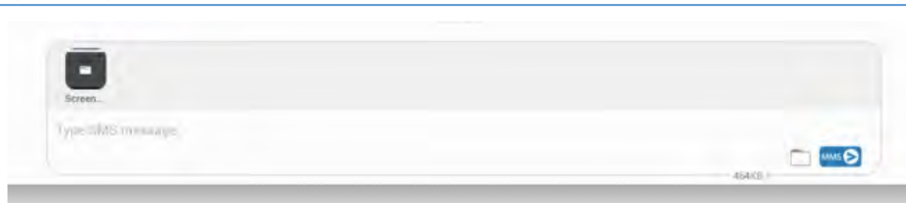
Click the compose icon at the top of the SMS panel to start a new message. A contact list appears showing all users with SMS-capable numbers. Scroll through the list or type a name or number in the search field to find your recipient, then select them to open a new message thread.

Sending a Message

Type your message in the compose field at the bottom of the conversation. SMS messages have a 160-character limit — a countdown counter in the bottom right of the compose area decreases as you type so you always know how much space you have left.

Click the blue SMS button to send.

Sending a File (MMS)



MMS compose area with file attached and send button showing MMS

Click the attachment icon (folder) to attach an image or file. Once attached, a thumbnail preview appears in the compose area and the file size is shown. The send button automatically switches from SMS to MMS to indicate you're sending a multimedia message. Click MMS to send.

Conversation Options

The "..." menu next to the SMS panel header gives you a Delete option to remove a conversation from your list. The two icons in the top right of an open conversation are Call (to call the number directly) and Delete (to delete the conversation).

Searching SMS Conversations

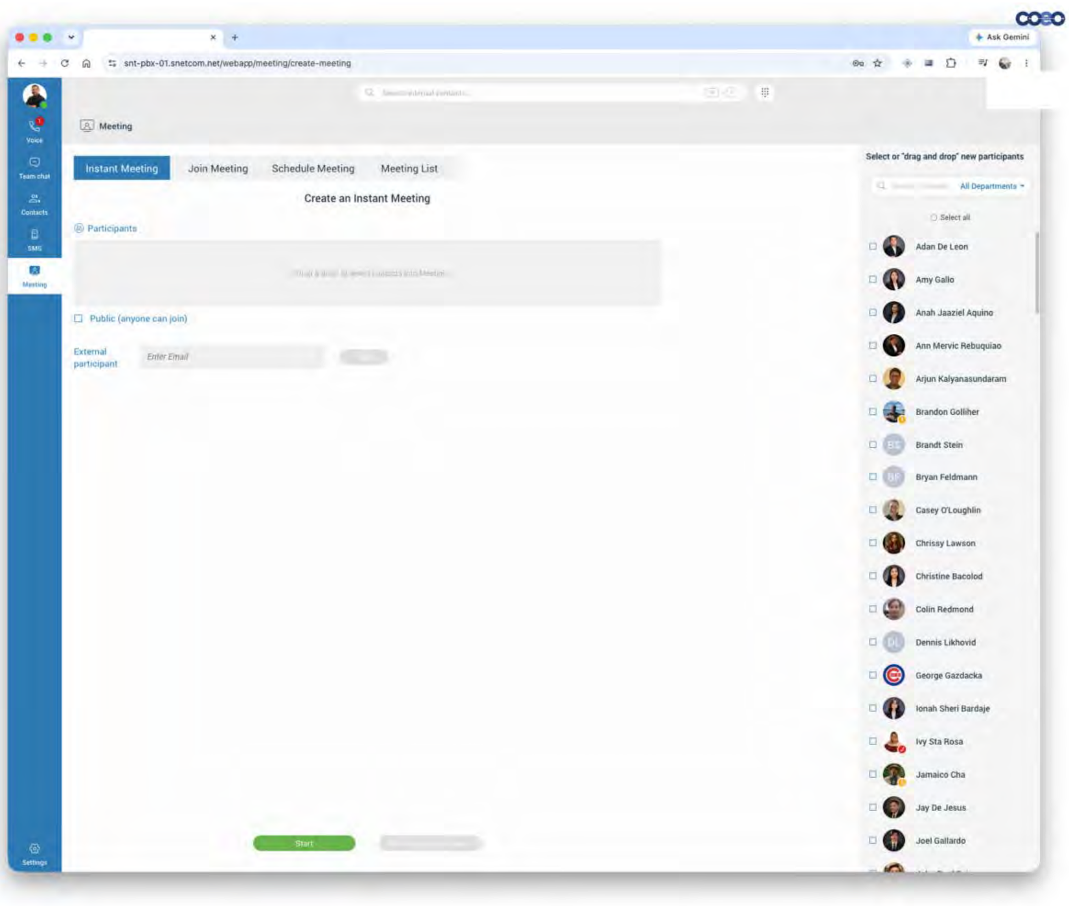
Use the search bar at the top of the SMS panel to find a conversation by contact name or phone number. Note that this searches your conversation list only — it does not search within the content of individual message threads.

Meeting

> 💡 **Note:** Meetings is an optional add-on feature that must be configured for your account before it's available. If the Meeting option isn't visible in your navigation, or features aren't working, contact your COEO Account Manager or CTA to have it enabled. If Meetings is not enabled on your account, only the Join Meeting tab will be available — you can still join a meeting by entering a meeting number, but you won't be able to start, schedule, or view meetings.

The Meeting section lets you start instant video meetings, schedule future meetings, and manage your meeting history. It has four tabs: Instant Meeting, Join Meeting, Schedule Meeting, and Meeting List.

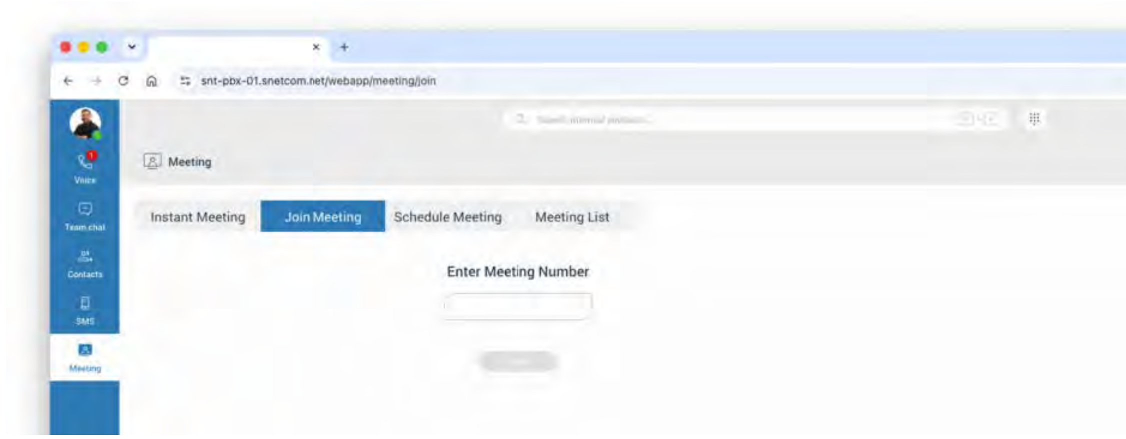
Instant Meeting



Create an Instant Meeting screen

Use this to start a meeting immediately. Select participants from the contact panel on the right by checking their names or dragging and dropping them into the Participants area. You can also invite external participants by entering their email address in the External participant field and clicking Add. Check Public if you want to allow anyone with the meeting link to join without being explicitly invited. When you're ready, click Start.

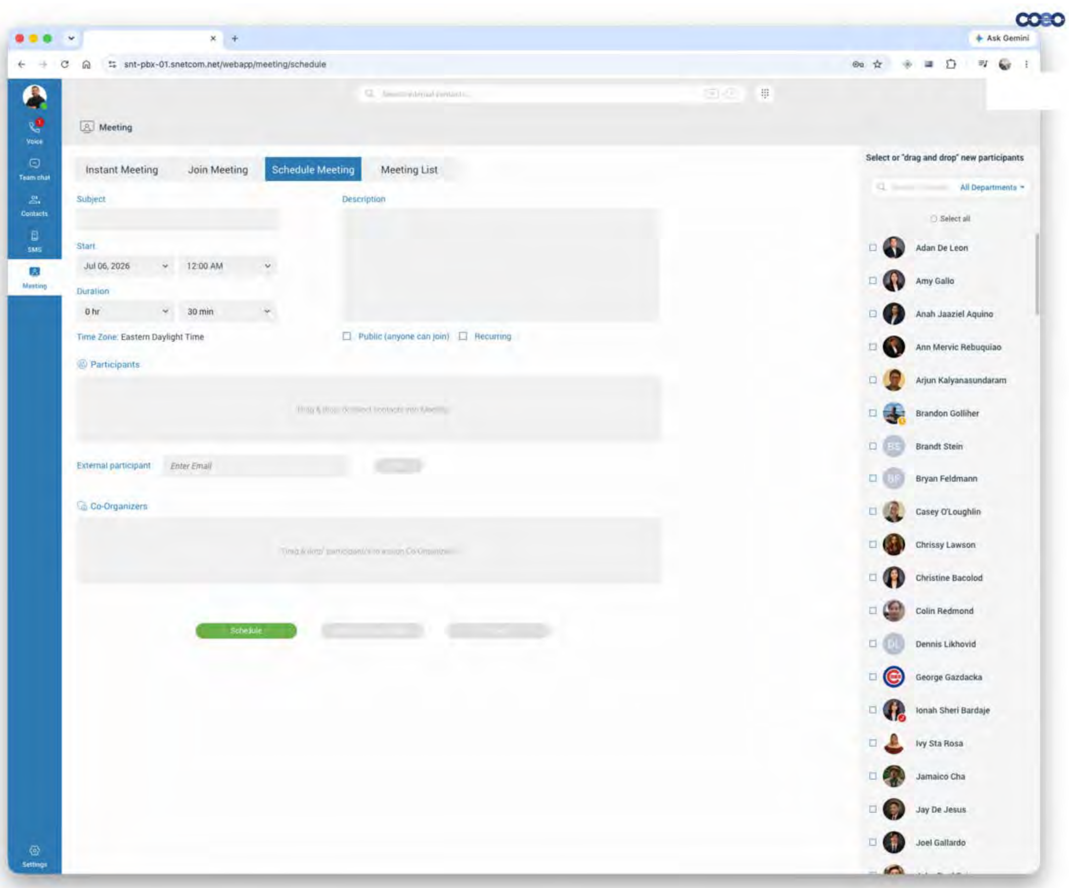
Join Meeting



Join Meeting screen

If someone has shared a meeting number with you, click the Join Meeting tab, enter the meeting number, and click Join.

Schedule Meeting



Schedule Meeting screen

Plan a meeting in advance by filling in the following details:

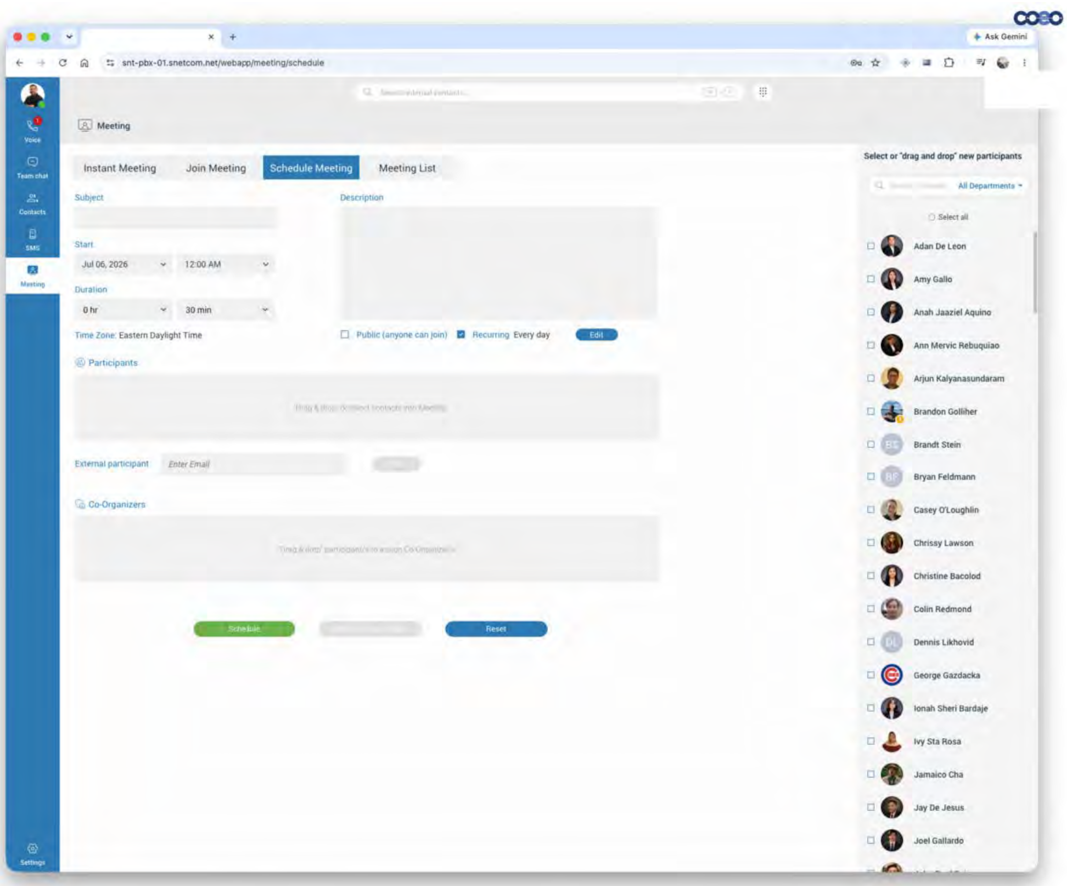
- **Subject** — The meeting title.

- **Description** — Optional context or agenda.
- **Start** — Date and time the meeting begins.
- **Duration** — How long the meeting is expected to run.
- **Time Zone** — Automatically set based on your local time zone.
- **Public** — Check this to allow anyone with the link to join.
- **Recurring** — Check this to set up a repeating meeting (see below).

Select internal participants from the panel on the right or drag and drop them into the Participants area. Add external attendees by email using the External participant field. You can also assign Co-Organizers by dragging participants into the Co-Organizers area — co-organizers share meeting management permissions with you.

Click Schedule to save the meeting, Remove all participants to clear your selections, or Reset to clear the entire form.

Setting Up a Recurring Meeting



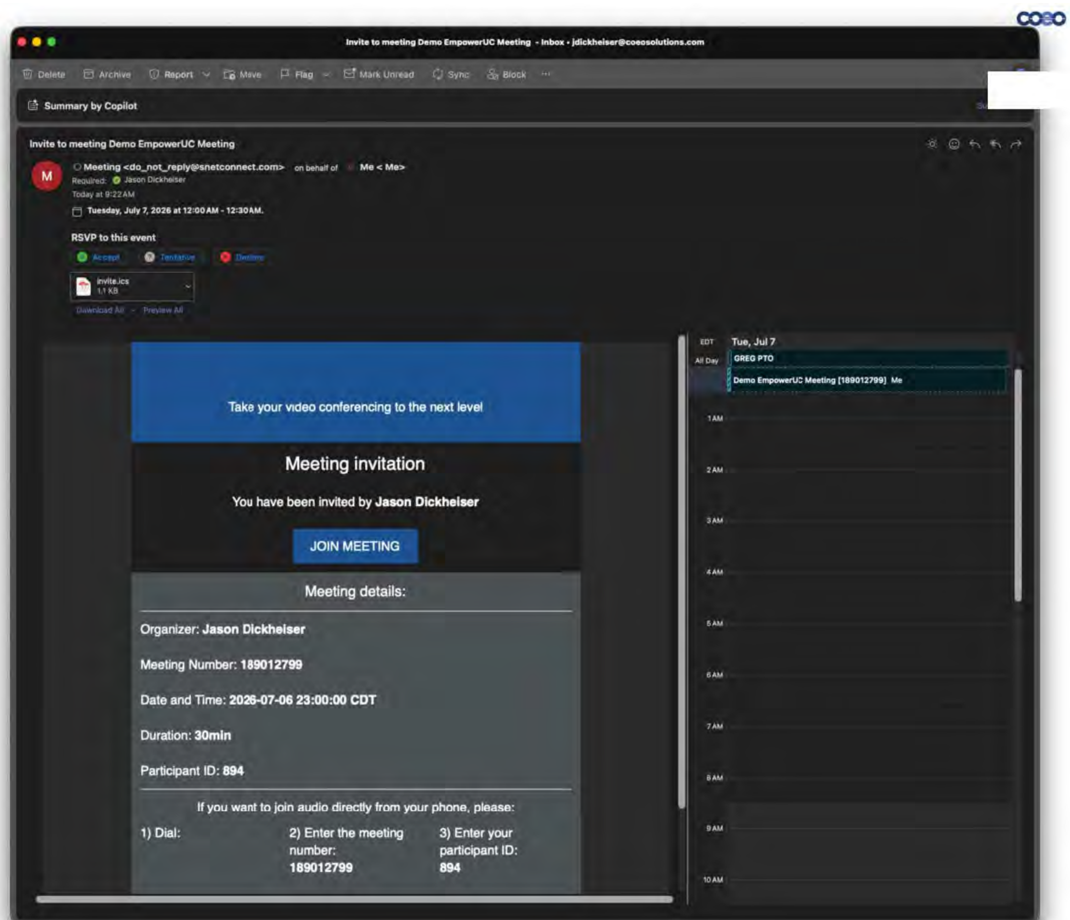
Recurring checkbox enabled showing Edit button

Check the Recurring box and click Edit to configure the recurrence pattern.

Recurring Meeting dialog

In the dialog that appears, set how often the meeting repeats (every X days, weeks, or months), and choose when it ends — by a specific date, after a certain number of occurrences, or never. A plain-language summary of your recurrence pattern is shown at the bottom. Click Save when done.

Meeting Invitations

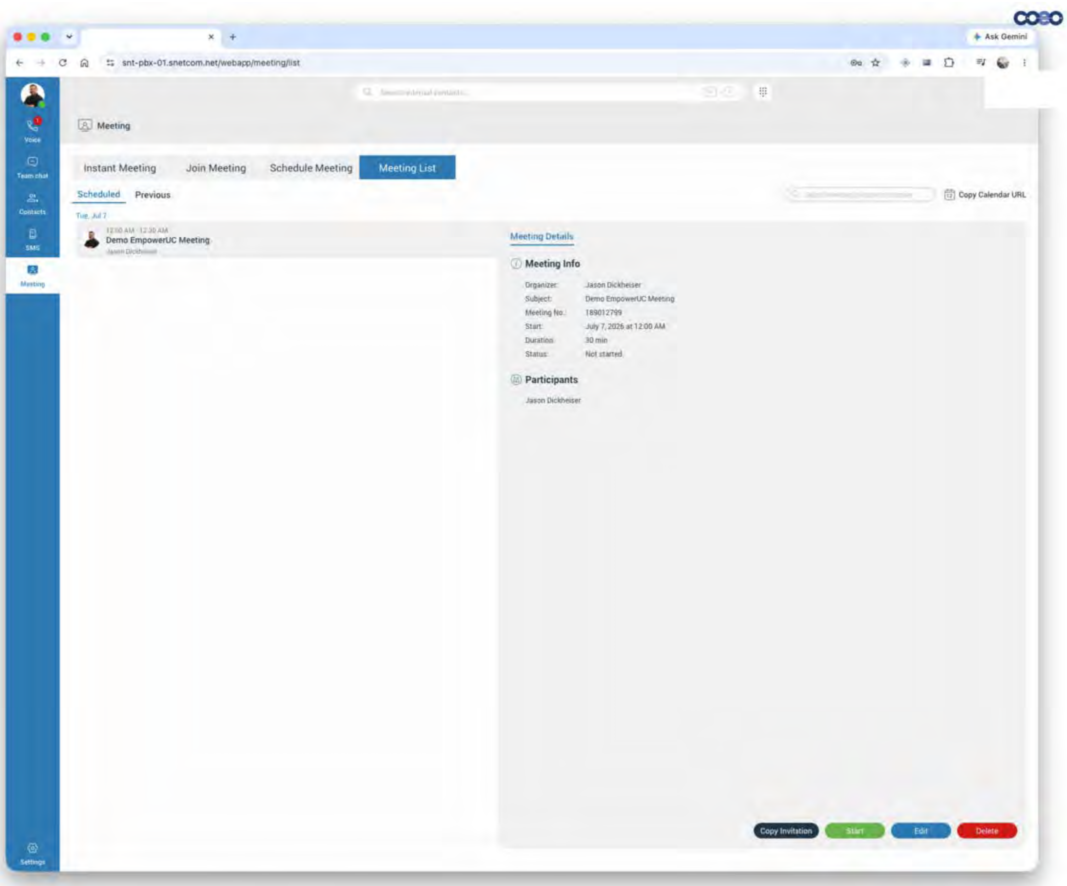


Meeting invitation email received in Outlook

When you schedule a meeting and use Copy Invitation from the Meeting List, participants receive an email invitation that includes a Join Meeting button, the organizer's name, meeting number, date and time, duration, and their Participant ID. The invitation also includes an .ics calendar attachment so recipients can add the meeting directly to their calendar app.

If your account is configured for dial-in audio, the invitation will also include a phone number and step-by-step instructions for joining by phone.

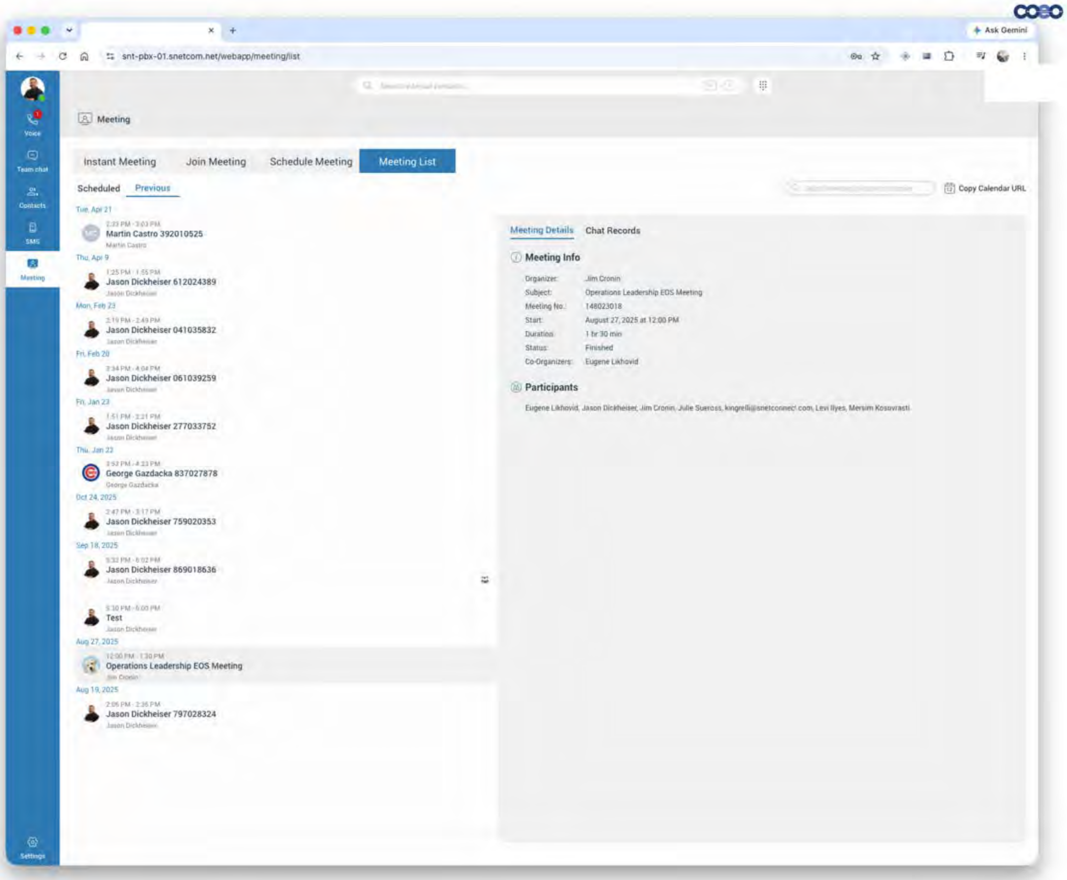
Meeting List



Meeting List — Scheduled tab with meeting details

The Meeting List shows all your upcoming and past meetings. The Scheduled tab lists meetings that haven't happened yet, grouped by date. Selecting a meeting shows its full details on the right: organizer, subject, meeting number, start time, duration, status, and participants. From here you can:

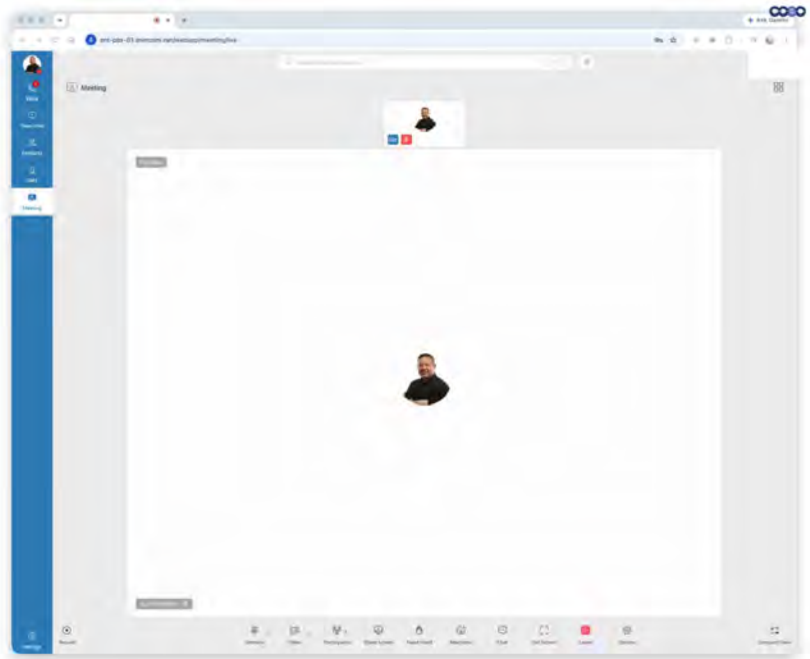
- **Copy Invitation** — Copies the meeting details and join link to your clipboard to share with participants.
- **Start** — Launches the meeting immediately.
- **Edit** — Modify the meeting details.
- **Delete** — Remove the meeting.



Meeting List — Previous tab with Chat Records tab visible

The Previous tab shows completed meetings. In addition to Meeting Details, past meetings include a Chat Records tab where you can review the chat conversation that took place during the meeting. Use the search bar in the top right to find a specific meeting by name or number, and click Copy Calendar URL to subscribe to your meeting schedule in an external calendar app.

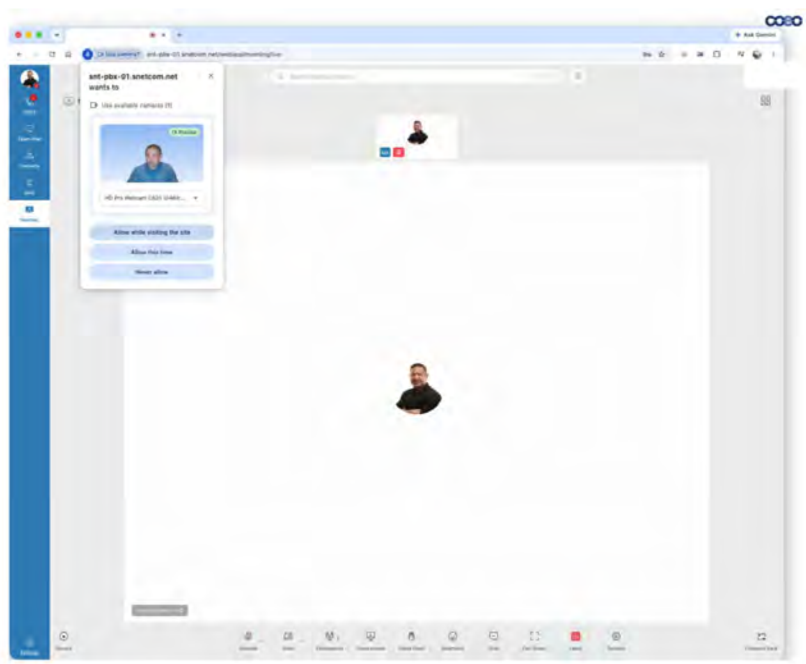
In a Meeting



Active meeting interface

Once a meeting starts, you'll see the main video area in the center, a participant carousel across the top showing all attendees, and a toolbar along the bottom with your meeting controls.

Camera Permission



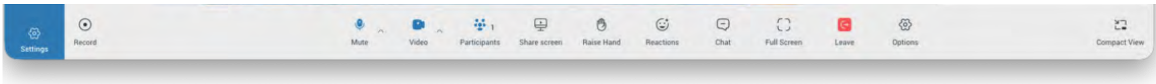
Browser camera permission prompt

The first time you enable your camera in a meeting, your browser will ask for permission to use it. Click Allow while visiting the site so you won't be prompted again.

Meeting Controls

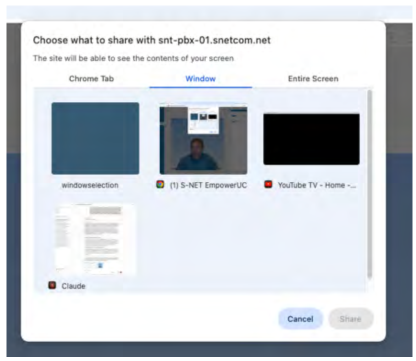
The toolbar at the bottom gives you access to everything during the meeting:

- **Record** — Start or stop recording (must be enabled on your account by an administrator).
- **Mute / Unmute** — Toggle your microphone. The arrow next to the button lets you switch audio devices mid-meeting.
- **Video** — Toggle your camera on or off. The arrow lets you switch camera devices.



Participants panel open during a meeting

- **Participants** — Open the participants panel to see who's in the meeting, invite others, or (as the organizer) mute all participants at once.

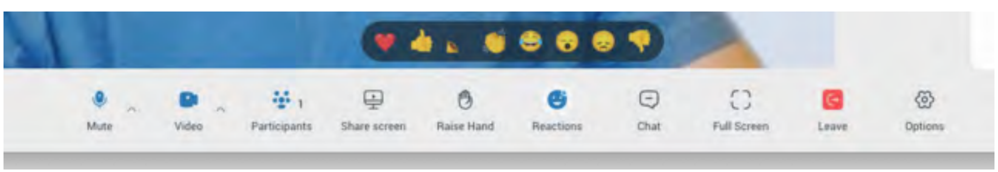


Screen share dialog — choose Chrome Tab, Window, or Entire Screen

- **Share screen** — Share a browser tab, a specific application window, or your entire screen. Select your choice and click Share.

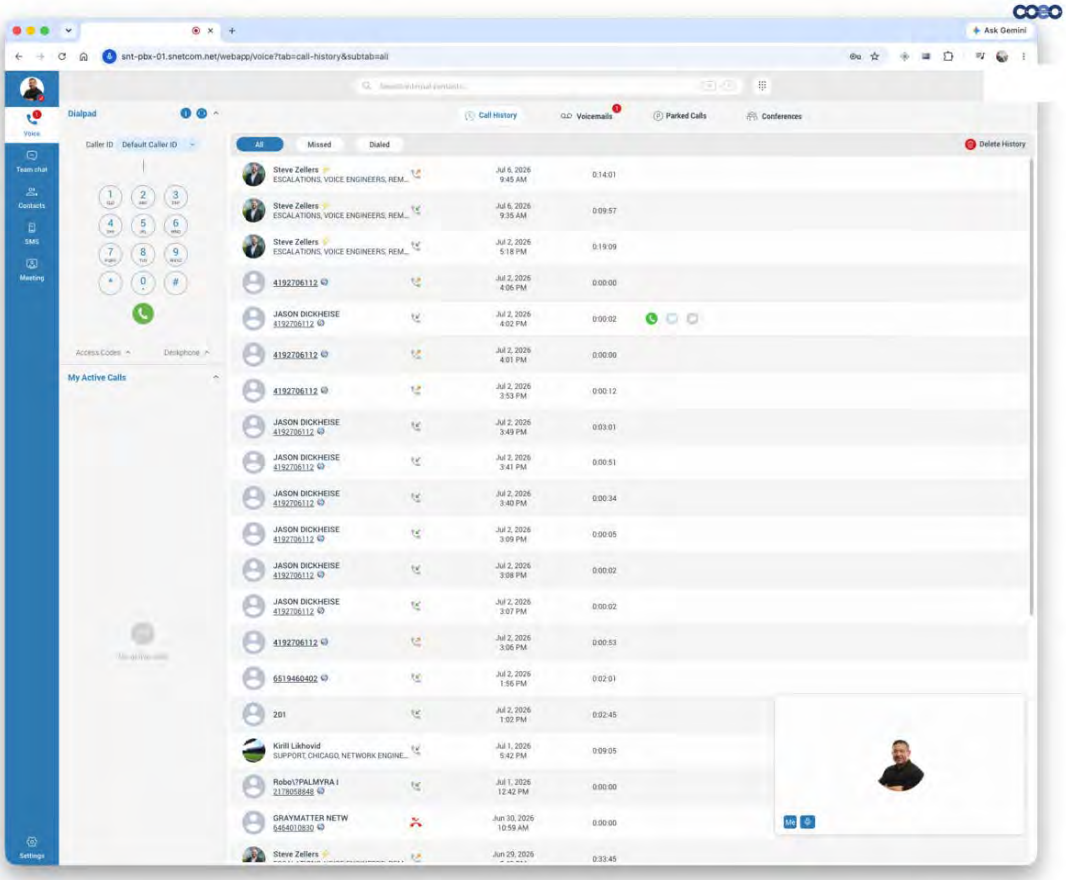
> 💡 **Note:** On macOS, if you see a red "Screen Recording Permission Required" banner when trying to share your screen, grant screen recording permission in your Mac's System Settings first.

- **Raise Hand** — Signals to the organizer and other participants that you'd like to speak.

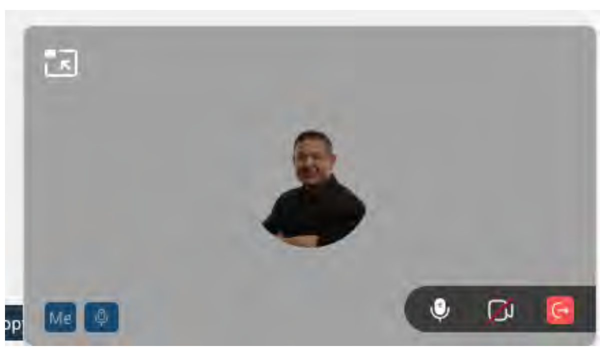


Reactions emoji row visible on video tile

- **Reactions** — Send a quick emoji reaction (heart, thumbs up, clapping, laughing, surprised, sad, thumbs down) that appears on your video tile.
- **Chat** — Open the in-meeting chat to send messages to participants.
- **Full Screen** — Expand the meeting to fill your entire screen.
- **Leave** — Leave the meeting.
- **Options** — See the Options Menu section below.



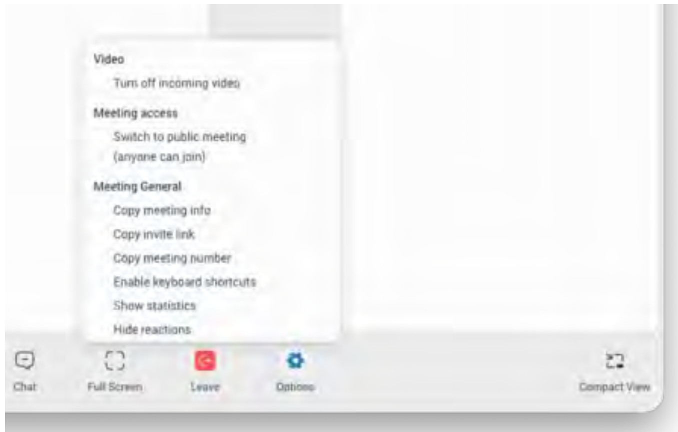
Compact View — meeting minimized to picture-in-picture window



Compact View on hover — showing expand, mic, video, and leave controls

- **Compact View** — Minimizes the meeting to a small floating window in the corner of the screen, so you can use other parts of the app while staying in the meeting. Hover over the compact window to access your microphone toggle, video toggle, and Leave button. Click the expand icon in the top-left corner of the compact window to return to full meeting view.

Options Menu



Options menu showing Video, Meeting access, and Meeting General sections

The Options menu provides additional controls organized into three sections:

Video:

- **Turn off incoming video** — Stops rendering other participants' video streams, useful on slower connections.

Meeting access:

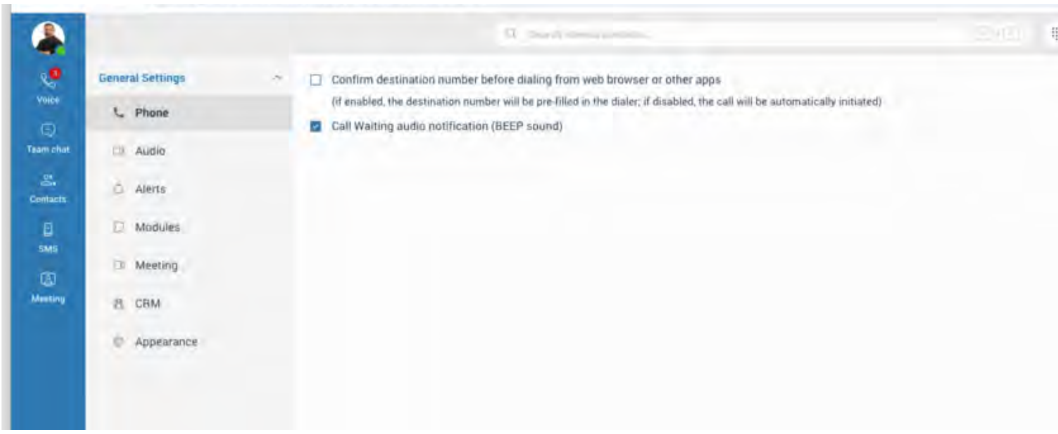
- **Switch to public meeting** — Opens the meeting so anyone with the link can join.

Meeting General:

- **Copy meeting info / Copy invite link / Copy meeting number** — Handy for sharing access with latecomers mid-meeting.
- **Enable keyboard shortcuts** — Turns on keyboard shortcuts for meeting controls.
- **Show statistics** — Displays connection and audio/video quality stats, useful for troubleshooting.
- **Hide reactions** — Turns off emoji reaction overlays on video tiles.

Settings

Click the Settings (gear) icon at the bottom of the left navigation bar to access your personal preferences. All changes are saved automatically — there's no save button needed.



Settings — Phone

Phone

- **Confirm destination number before dialing from web browser or other apps** — When enabled, clicking a phone number link (like Click to Dial) pre-fills the dialpad so you can review the number before calling. When disabled, the call initiates immediately.
- **Call Waiting audio notification (BEEP sound)** — When enabled, you'll hear an audible beep when a second call comes in while you're already on a call. Enabled by default.

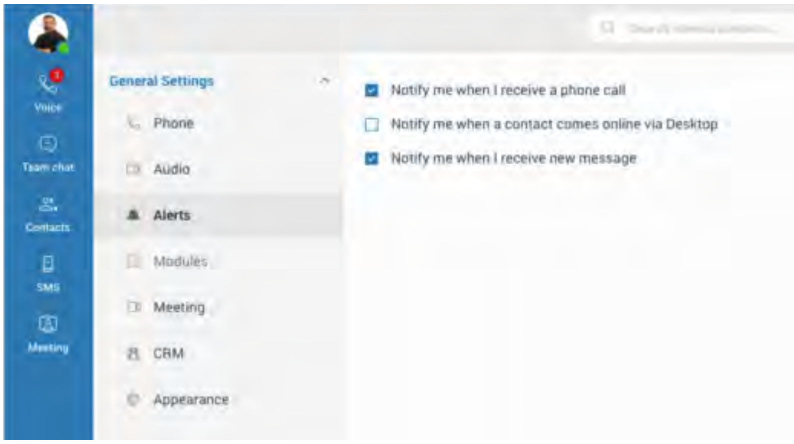
Audio

Settings — Audio

Set your preferred audio devices for calls:

- **Microphone** — Select your input device.
- **Speakers** — Select your output device.
- **Ringing device** — Select which device plays the ringtone for incoming calls. This can be different from your call audio speaker — useful if you want your ring to play through a separate device.
- **Headset integration** — Enable this if you're using a supported headset (Plantronics, Jabra, or EPOS Sennheiser) to allow headset controls — like answer, hang up, and mute — to work directly from your headset. Note that Plantronics requires the Plantronics Hub software to be installed and running on your computer, and the same applies for Jabra and EPOS Sennheiser headsets.

Alerts

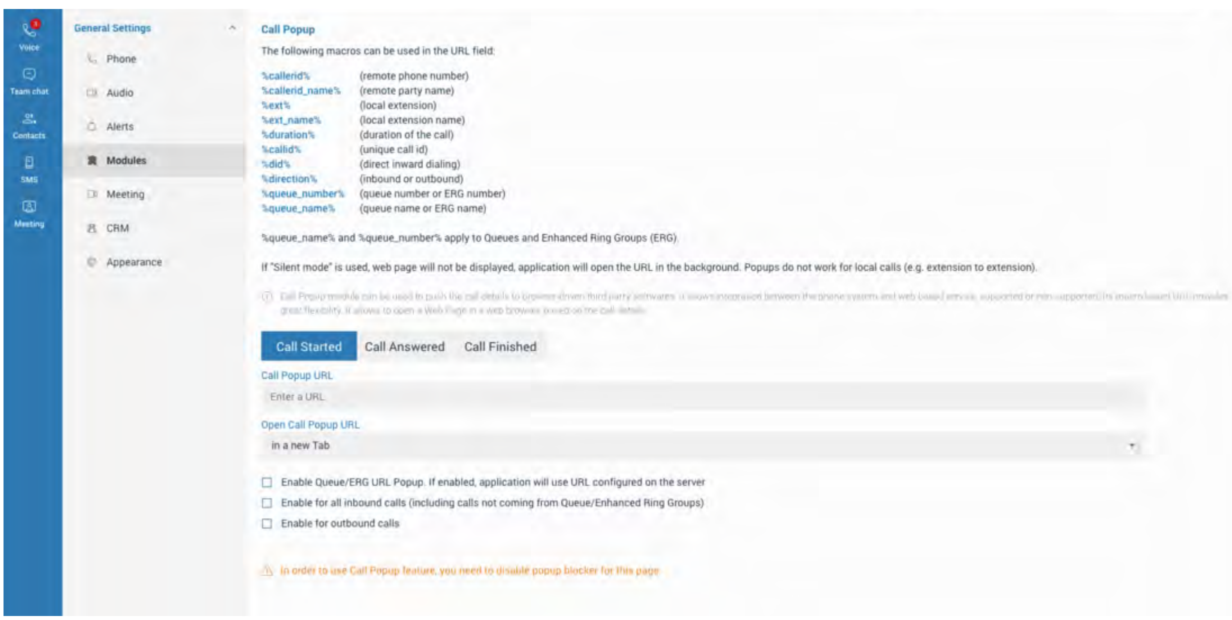


Settings — Alerts

Control which notifications you receive:

- **Notify me when I receive a phone call** — Enabled by default.
- **Notify me when a contact comes online via Desktop** — Disabled by default.
- **Notify me when I receive a new message** — Enabled by default.

Modules



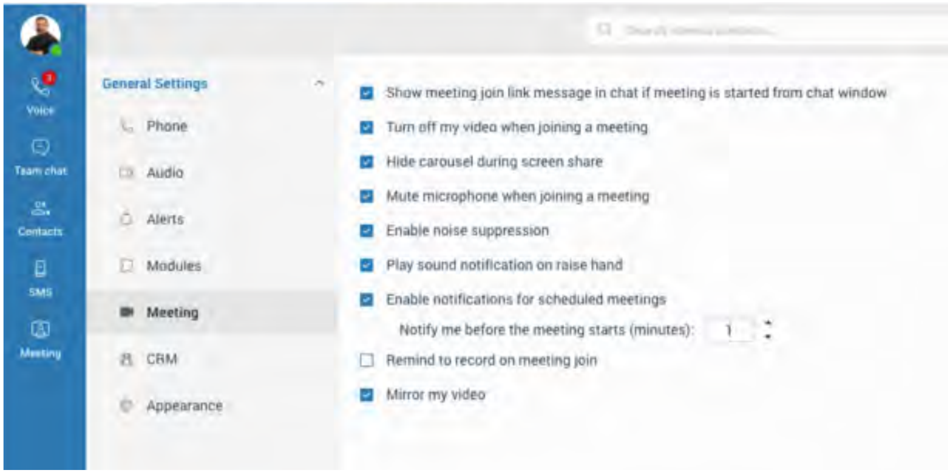
Settings — Modules (Call Popup)

The Modules section contains the Call Popup feature, which lets you automatically open a URL when a call starts, is answered, or finishes. This is useful for integrating with browser-based third-party tools, ticketing systems, or CRMs. You can use dynamic macros in the URL to pass call details like caller ID, extension, call direction, and queue information automatically.

Call Popup can be configured to trigger on inbound calls, outbound calls, or both, and can open the URL in a new tab or silently in the background.

💡 **Note:** Your browser's popup blocker must be disabled for this page for Call Popup to work. This is an advanced feature — if you're interested in setting up Call Popup for a specific workflow, contact your COEO Account Manager or CTA for guidance.

Meeting



Settings — Meeting preferences

Customize your meeting experience. All options below are enabled by default unless noted:

- **Show meeting join link message in chat if meeting is started from chat window**
- **Turn off my video when joining a meeting**
- **Hide carousel during screen share**
- **Mute microphone when joining a meeting**
- **Enable noise suppression**
- **Play sound notification on raise hand**
- **Enable notifications for scheduled meetings** — With a configurable advance notice in minutes (default: 1 minute).
- **Remind to record on meeting join** — Disabled by default.
- **Mirror my video**

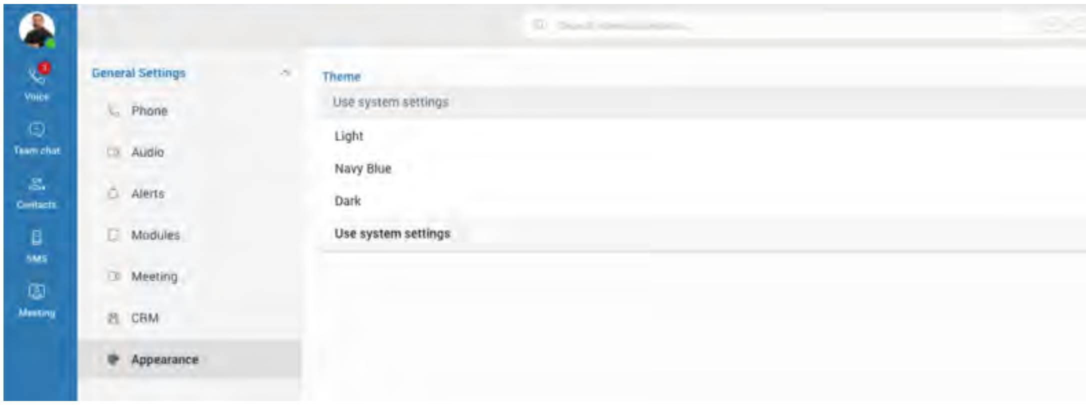
CRM

The CRM section is where you connect EmpowerUC™ to your organization's CRM platform. When a CRM integration is active, call activity can be automatically logged to your CRM, and contact information from your CRM will appear during calls.

Supported CRM platforms include Salesforce, HubSpot, Zoho, Microsoft Dynamics, SugarCRM, Zendesk, Vtiger, Pipedrive, and others. If no integration has been set up, this section will show "No active integrations."

💡 **Note:** CRM integrations require setup at the system level before they can be connected here. If your organization would like to integrate EmpowerUC™ with your CRM, contact your COEO Account Manager or CTA to get started.

Appearance



Settings — Appearance (Theme and Language)

Two options are available:

- **Theme** — Choose from Light, Navy Blue, Dark, or Use system settings (which matches your device's light/dark mode preference).
- **Language** — Change the app interface language. Available options are English (US), Español, Français, Italiano, Nederlands, and Português.