

Collaboration User Guide

i This guide explains how to access and to use Wildix Collaboration and describes the basic operations: call, chat, video call, conference, fax, SMS.
WMS Version: 5.0X
Other Collaboration related documentation: [Collaboration and Mobile Apps Documentation](#).
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- [Prerequisites](#)
- [First time login](#)
- [Quick menu introduction](#)
- [User status](#)
 - [User status and status message](#)
 - [User picture](#)
 - [Geolocation](#)
- [Colleagues \(roster\)](#)
 - [Edit colleagues list \(roster\)](#)
 - [User status icons explanation](#)
 - [Colleagues status information](#)
 - [Set user status of colleagues](#)
 - [Call intrusion \(barging\)](#)
 - [Call pickup / see who is calling](#)
 - [Map view of colleagues](#)
- [Instant Messaging](#)
 - [Start a chat session](#)
- [File transfer](#)
- [Screen Sharing and remote control](#)
- [Multiuser group chat](#)
- [Post-It & Call me back](#)
 - [Post-It](#)
 - [Call me back](#)
- [Call](#)
 - [Active device for calls](#)
 - [Make a call / Search for contact](#)
 - [Answer a call](#)
 - [Call management](#)
 - [Hold/ second call](#)
 - [Call transfer](#)
 - [Conference call](#)
 - [Video call](#)
 - [Record a call](#)
- [Attendant Console](#)
- [Fax / SMS](#)
 - [Fax](#)
 - [SMS](#)
- [Settings](#)
 - [Personal](#)
 - [Two-factor authentication \(2FA\)](#)

- [Call features](#)
- [Function keys](#)
- [Fax Server](#)
- [Chat/ Presence](#)
- [Contact center](#)
- [Web Phone](#)
- [Extensions](#)
- [Phonebook](#)
 - [Create/ edit a contact](#)
 - [Personal phonebook](#)
 - [Contact notes](#)
- [Calls / faxes history](#)
 - [Download faxes and call recordings](#)
 - [Setting tags](#)
 - [Voicemails](#)
- [Logout](#)

Prerequisites

Supported OS

- Mac OS X 10.8 and higher
- Microsoft Windows 7 (64-bit) and higher
- Linux (only Chrome browser)



Notes: Windows Server version pre 2012 is not supported over RDP.

Android / iOS

- Download the app for iPhone, iPad, Android smartphones on App Store / Google Play Market (read the guides: [iOS Collaboration Mobile App](#), [Android Collaboration Mobile App](#))

Collaboration native application

- EXE file for Windows 7, 10:
 - <https://files.wildix.com/integrations/win/collaboration/Collaboration-x64.exe>
- MSI file for Windows 7, 10:
 - <https://files.wildix.com/integrations/win/collaboration/Collaboration-x64.msi>
- For MacOS:
 - <https://files.wildix.com/integrations/osx/collaboration/Collaboration.pkg>

Recommended web browser and connection mode

- Collaboration can be accessed via any HTML5 browser
- Recommended browser: the latest stable version of Chrome, since it fully integrates WebRTC
- It is recommended to access via HTTPS



Note: Collaboration cannot be accessed via Internet Explorer.

Licenses that must be enabled on PBX

- Min. UC-Essential license is needed for each user

More information: [Wildix Per-User Licensing](#)

Bandwidth requirements:

- For calls via Collaboration using G.711 codec 80 Kbps is necessary

First time login

1. Open the web browser
 2. Type into URL bar the PBX name or IP address (example: <https://mycompany.wildixin.com>)
 3. Enter your credentials:
 - Login (extension or email address)
-  Important: login via user name is not supported!
- Password (WEB password)
 4. Click **Login** button to log in

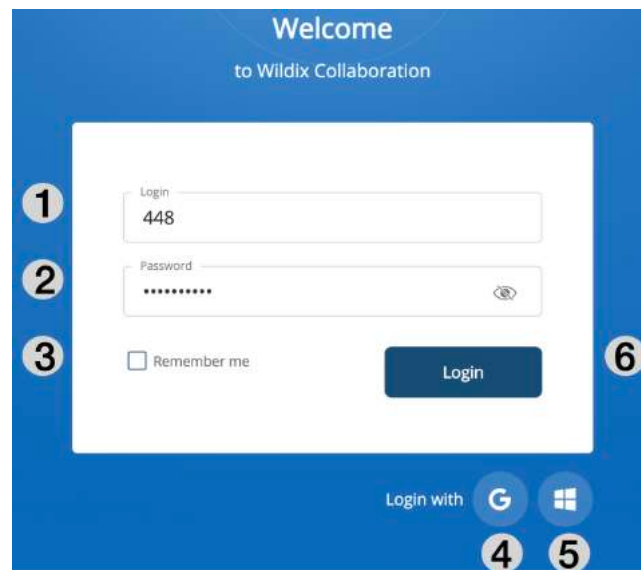
You can enable single sign-on with your Google or Office 365 email to be able to access Collaboration using your Google / Office 365 password, if:

- You use the same email as the one present in your user settings
- This email address is unique in the system

 Note: Wildix does not get access to your Google / Office 365 password.

 Note: PBX admin can automatically send users their credentials for access to Collaboration via email: *WMS Users* -> select users and click **Send Welcome Message** (more details can be found in [WMS Start Guide](#)).

Login window:



- 1 - Login
- 2 - Password
- 3 - “Remember me” option
- 4 - Single sign-on with Google
- 5 - Single sign-on with Office 365
- 6 - Click to log in

Once you access Wildix Collaboration, follow the popup notifications which help you to:

- Enable desktop notifications (incoming call/ chat/ voicemail and other popup notifications)
- Enable location sharing

Video tutorial: <https://wildix.wistia.com/medias/cnl8s726wi>

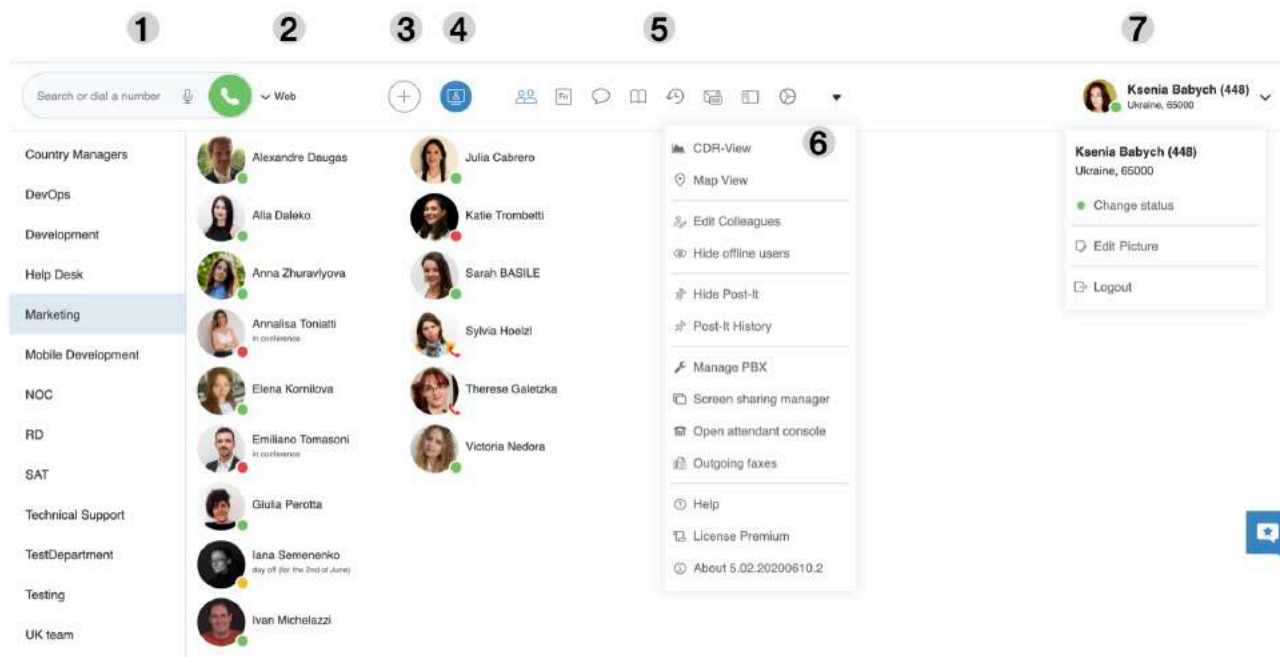
Basic settings

Select **Settings** in the top menu -> *Personal*:

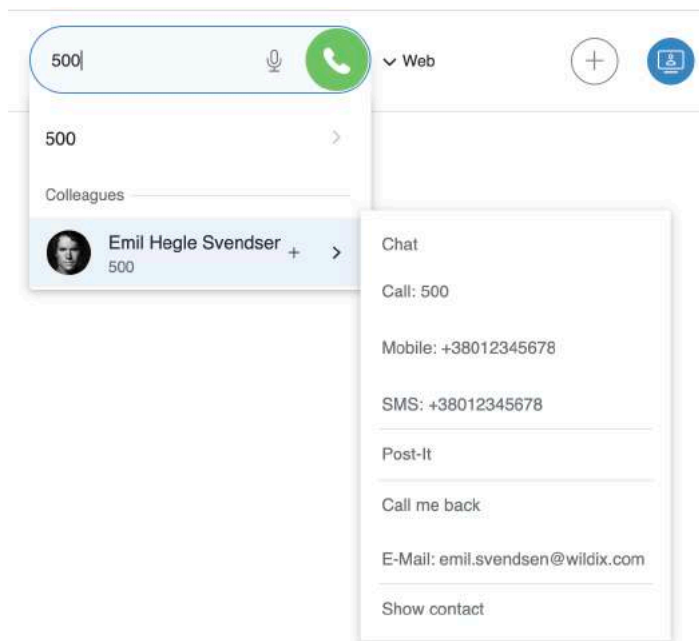
- *E-Mail*: used for email notifications about new Voicemails, missed calls, unread chat messages, call recordings, fax reports etc
- *Mobile*: mobile number for Mobility extension which allows you to make and receive calls via Wildix PBX using your mobile phone
- *Language*: selected language is used for Collaboration user interface, system sounds (Voicemail, IVR prompts, etc), WP4X0, WorkForce, WelcomeConsole
- *Date/time format*: applied to Wildix devices except W-AIR handsets (must be set up on a device). For detailed information, refer to [Personal Settings](#) chapter

Quick menu introduction

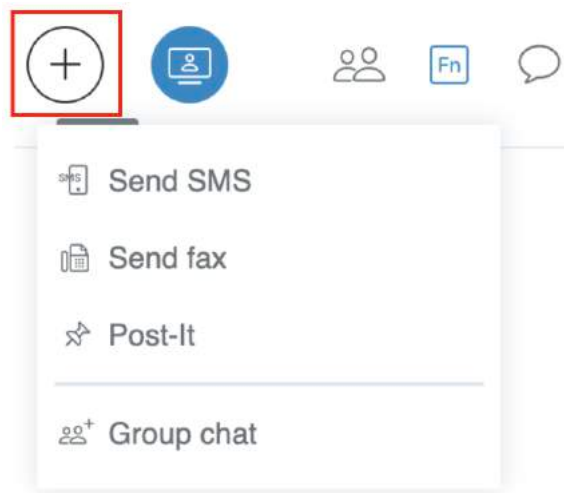
Top menu:



- 1 - Search field with speech recognition and call button: search for colleagues and contacts and perform quick actions from drop-down list: call, chat, send a fax/ Post-It etc:



- 2 - **Device selection:** active device to place and answer calls using Collaboration
- 3 - **Add option:** access to **SMS / Fax / Post-It / Group chat** dialog window:



- 4 - **Video conference:** create and manage videoconferences based on WebRTC. Read the Guide for the detailed description: [Wizyconf Videoconference User Guide](#)

- 5 - Other tabs of Collaboration:

- [Colleagues](#): list of colleagues with presence status and geolocation
- [Fn keys](#): monitoring / management of colleagues / features (same as BLF keys of phone)

 Note: this menu becomes visible only if you have configured these keys in *Settings* -> *Function keys*.

- [Chat](#): active chat sessions
- [Phonebook](#): PBX shared and personal phonebooks
- [History](#): history of calls (synced with other Wildix devices), faxes, notes
- [Voicemail](#): access to Voicemail messages
- Web CRM: allows opening of a web application inside Collaboration. Refer to the section [Personal](#) in Settings for more information

 Note: this menu becomes visible only if you have configured it in Settings -> *Personal* -> *Web CRM*.

- [Settings](#): user settings, call features, feature keys settings and more

- 6 - Other (expanded):

- **CDR-View** access (if not restricted by license)
- [Map view](#): geographical map with location of colleagues
- [Edit Colleagues](#)
- **Show / hide offline users**
- **Show / hide [Post-It](#)**
- **[Post-It History](#)**
- **Manage PBX**: access to WMS (restricted to users of “admin” type)
- **Screen sharing manager**
- [Open Attendant Console](#) (if not restricted by license)
- **Outgoing faxes**: outgoing faxes queue
- **Help**: link to the Wildix Collaboration Guide (this Guide)
- **License**: shows the license assigned to a user and provides details on each user profile: <https://www.wildix.com/licensing/>
- **Version**: current WMS version

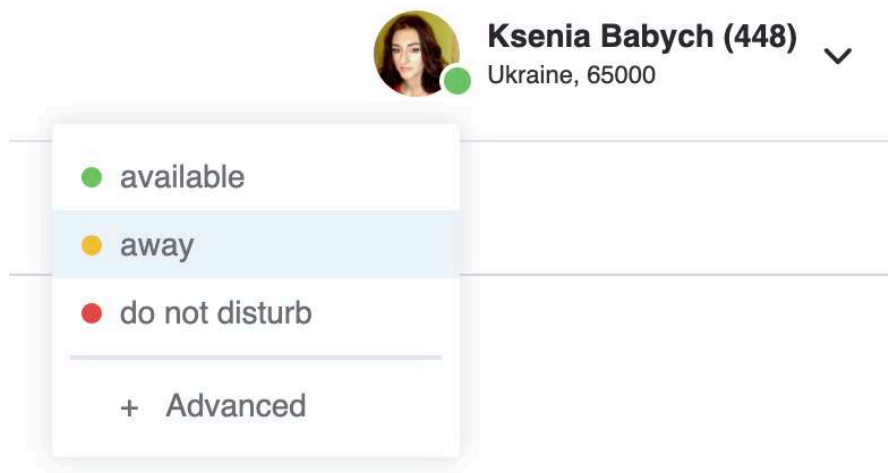
- 7 - User name, extension, location (if available), [User status](#), [status message](#) (if available), [picture](#) and logout option

User status

User status and status message

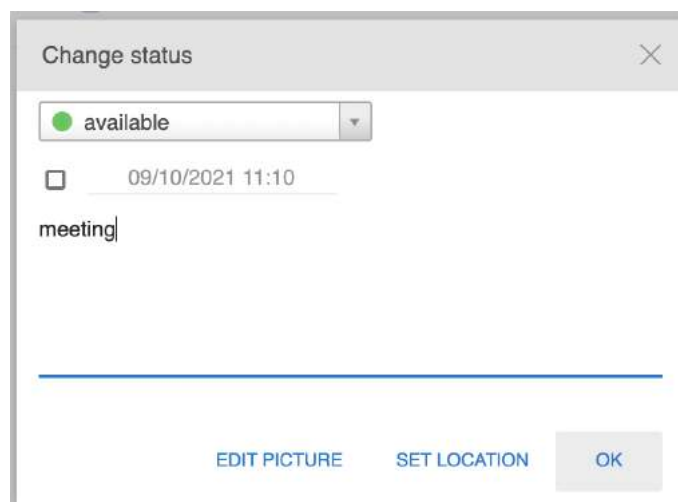
You can quickly change your user status:

1. Click on your current user status
2. Select a different user status from the list of available ones:



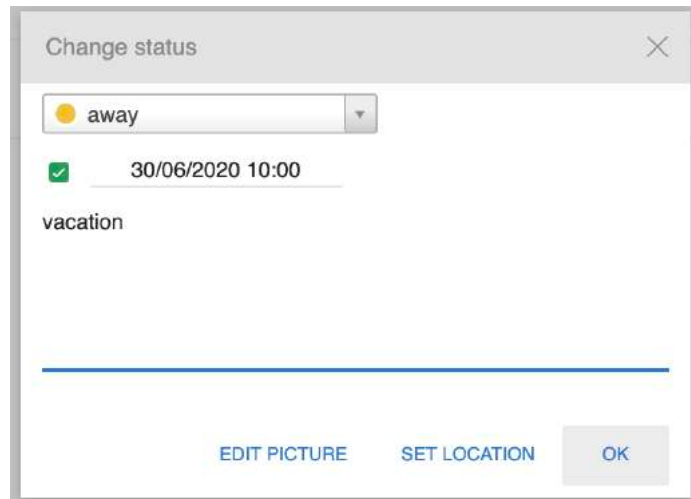
To add a status message:

1. Click on your user status in the top menu
2. Click + **Advanced**
3. Enter the status message into the field
4. Click **OK**:



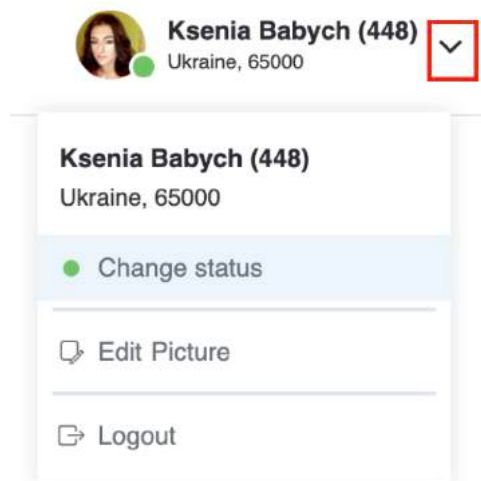
To set up Do Not Disturb (DND) / Away status:

1. Click on **available** status
2. Select DND (**Do not disturb**) or **Away** from the list
3. Select **Until** date and time (“*until*” value is optional while setting *Away*/ *DND* status. If it is not defined, user status switches back to *Available* after one hour)
4. Click **OK**:



A screenshot of a 'Change status' dialog box. At the top, there's a title bar with a close button. Below it, a dropdown menu shows 'away' with a yellow circle icon. Underneath, there's a green checkmark icon followed by the text '30/06/2020 10:00'. Below that, the word 'vacation' is displayed. At the bottom, there are three buttons: 'EDIT PICTURE', 'SET LOCATION', and 'OK'.

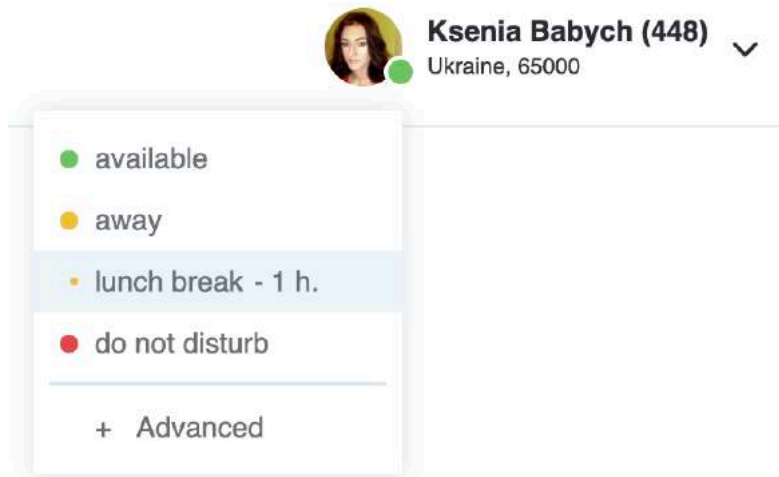
Additionally, you can change user status via **Change status option**:



 It is possible to disable/ enable call/ chat/ voicemail popup notifications when in DND: go to Collaboration **Settings** -> *Chat/ Presence* -> *Show notifications in DND status*.

 It is possible to set up the system to manage incoming calls based on your current user status (available, DND, away) and on call type (internal, external, whitelist, blacklist). See chapter: [Call features](#).

 It is possible to add Custom statutes with predefined status message and duration period (read chapter [Chat/ Presence](#)). After you add them, they will be available for quick selection in the drop-down list in the menu of user status setting:

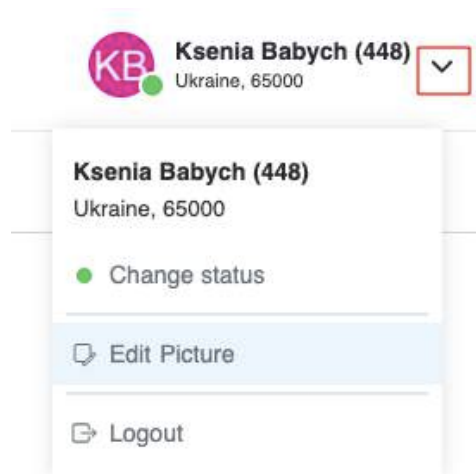


User picture

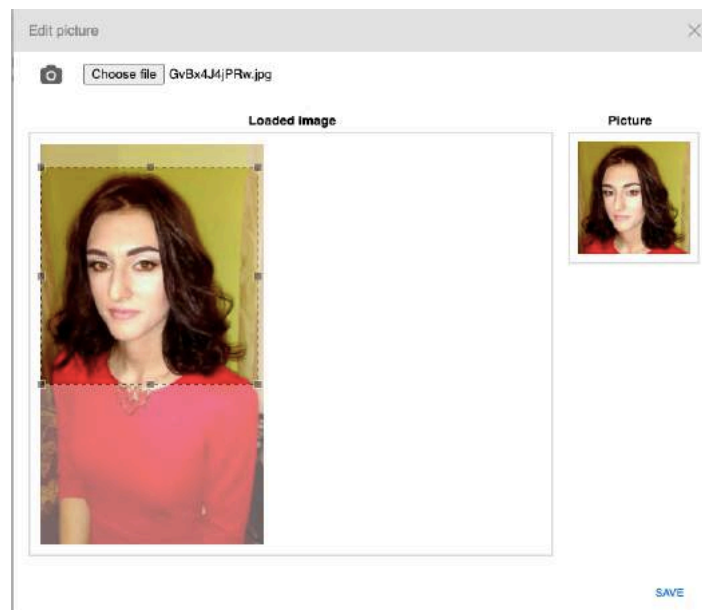
Users who have not set up their user picture, are displayed with initials (default avatar).

To set up / edit user picture:

1. Expand your user status in the top menu
2. Click **Edit picture**



- Choose the File on your PC (the picture is loaded)
3. Resize the picture (optional)
4. Click **Save**:



It is also possible to take a picture using a web camera, instead of loading it from PC:

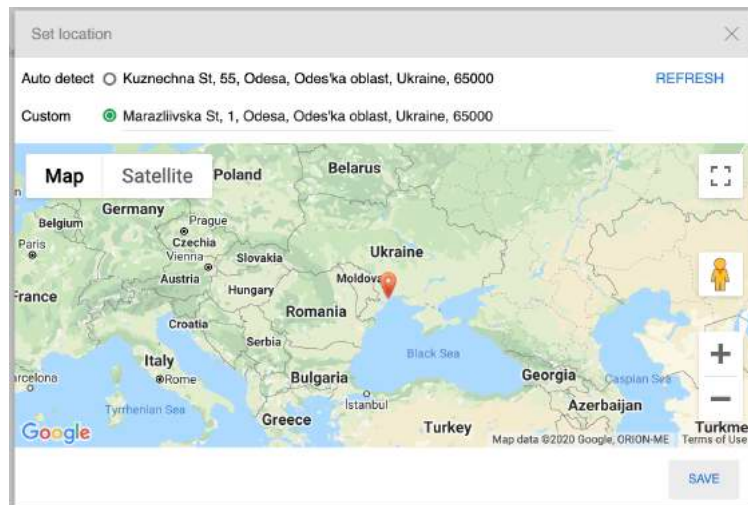
1. Click on the **Camera** button and take a picture of yourself
2. Resize the picture if needed
3. Click **Save**

Geolocation

You are prompted to enable location sharing in your browser permissions, upon your first login to Collaboration. Check your browser settings to enable / disable location sharing.

It is possible to manually define geolocation:

1. Click on your user status in the top menu and select **Advanced**
2. Click **Set location**
3. Select *Custom* to set up your location manually: enter the address into the field or move the red indicator (otherwise select *Auto detect* to enable the browser to automatically detect your location)
4. Click **Save**:



 Note: Maps in Collaboration are available only via *.wildixin.com domain.

Video tutorial: <https://wildix.wistia.com/medias/8mywo33f04>

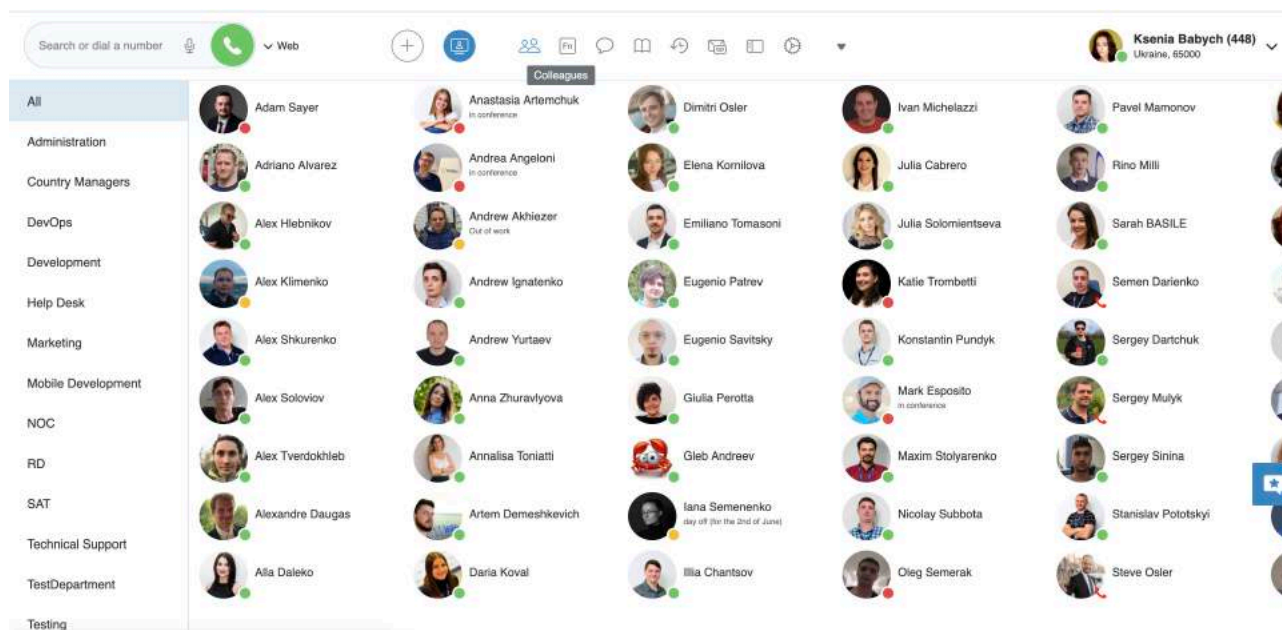
Colleagues (roster)

Select **Colleagues** in the top menu.

People from the same department are automatically added to user's roster and displayed in **Colleagues** menu upon the first time access.

Users are subdivided by work teams (managed on the WMS side). You can view all the users by clicking on **All** section or select a specific work team to view only its users. The maximum number of users that can be displayed in *Colleagues* is 200.

User status, user name, and user picture are displayed for each colleague. Mouse over a colleague shows additional buttons with available actions (Call / Chat / Post-It / Call me back etc):

**Notes:**

- Starting from WMS 5.04.20220309.1, the *Colleagues* tab in Collaboration shows the list of Departments and there is possibility to create a multilevel hierarchy of Departments. See this guide for details: [How to configure Departments tree](#)
- It is possible to display all PBX users on the Colleagues tab, not only people from the roster. For instructions on how to activate this option, check this guide: [Custom config parameters List: Display all PBX users on the Colleagues tab](#)

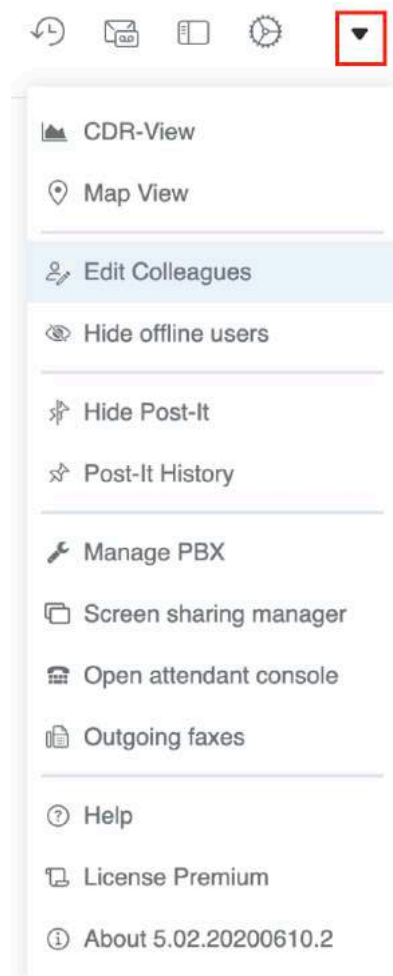


Limitation: Currently, status of users that don't belong to the roster is not available.

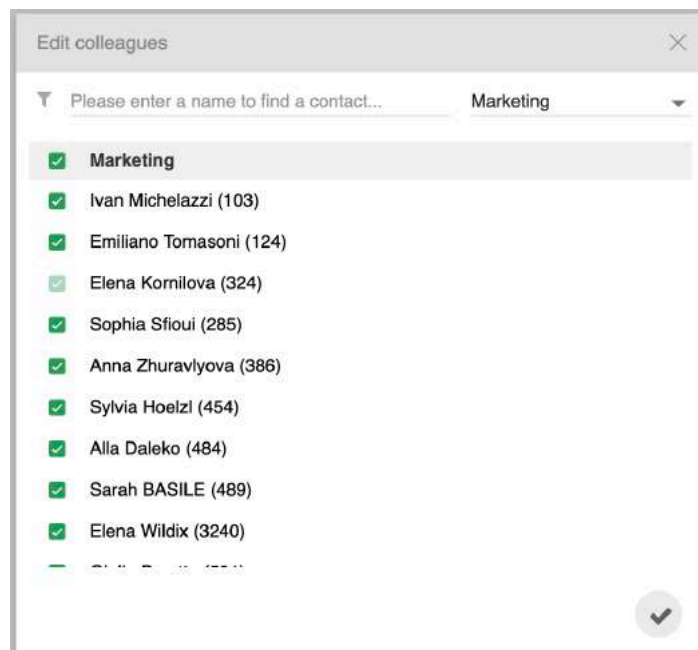
Edit colleagues list (roster)

To add/ remove a user from your roster:

1. Select **Other** in the top menu -> **Edit Colleagues:**



2. Select the colleagues (or work teams) that you want to add to your roster:

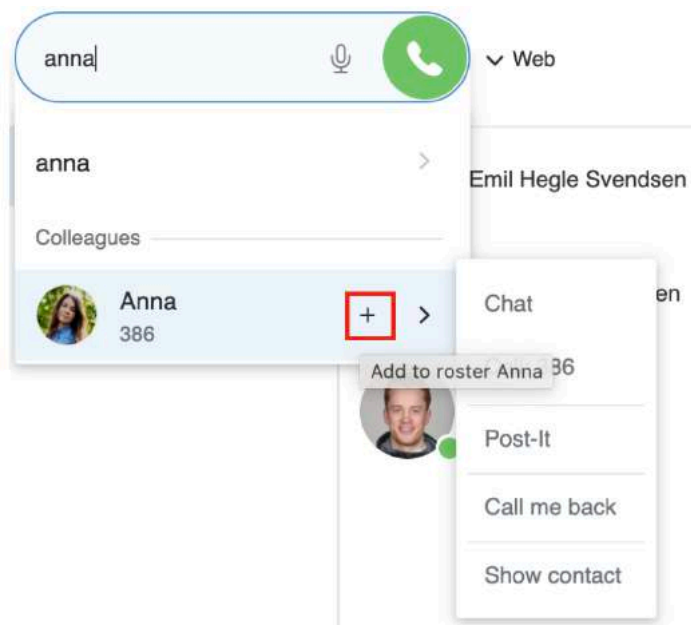


3. Click the **Tick** icon to save

Other options to add / delete colleagues from roster

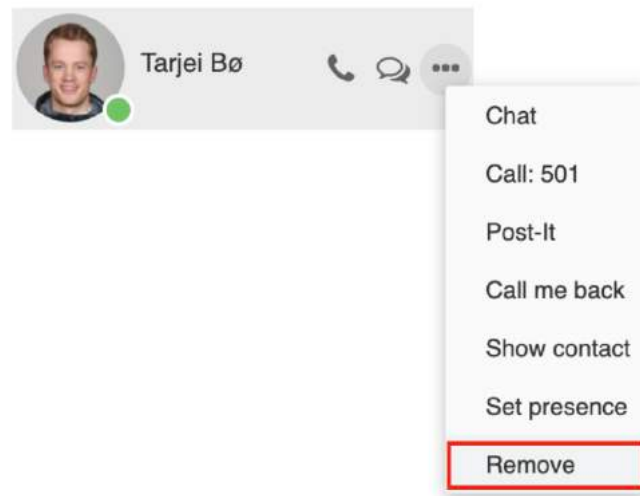
Add colleagues via Search field:

- Find a colleague by name / number and click on + icon:



Delete colleagues via *Colleagues* tab:

- Mouse over a colleague, click on **Options** button (three dots) and select **Remove**
- Or right-click on a colleague and select **Remove**:



User status icons explanation

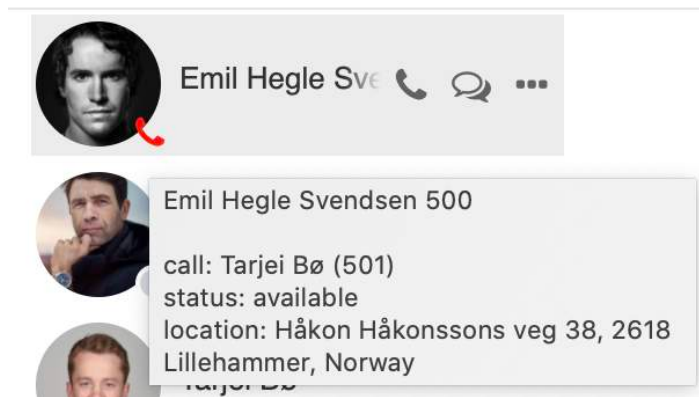
User status is synced over all Wildix devices registered to your account:

-  - available (user is connected to Collaboration)
-  - offline (user is not connected to Collaboration and has no active devices)
-  - reachable by phone (user is not connected to Collaboration but has an active device)
-  - talking (device status)
-  - ringing (device status)
-  - away (user-defined status, if grey = offline)
-  - DND (user-defined status, if grey = offline)

Colleagues status information

To view additional information (extension, who is calling, status information, location):

- Go to the **Colleagues** tab and focus the mouse cursor on the colleague:



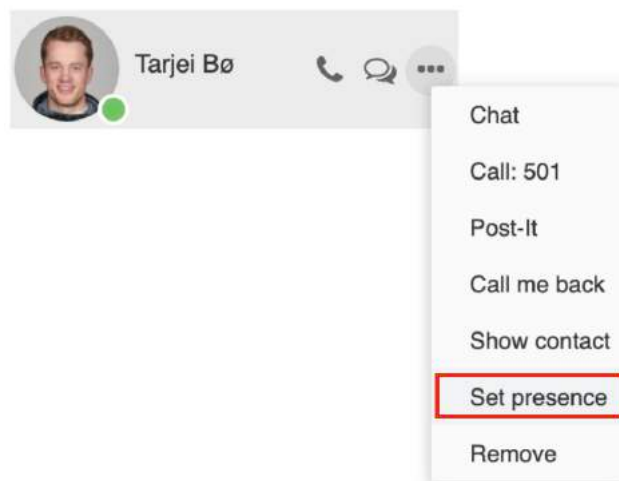
Same information can be consulted from *Messaging* / *Feature keys* tabs.

Set user status of colleagues

 Note: only users with certain permissions can set user status of colleagues; to enable the option, the PBX admin must add [ACL ability](#) "Can" - "Modify presence".

Proceed as follows:

- Mouse over a colleague, click on **Options** button (three dots) and select **Set presence**
- Or right-click on a colleague and select **Set presence**
- Proceed in the same way as you do for changing the personal user status:



Call intrusion (barging)

 Note: only users with certain permissions can do intrusion; to enable the option, the PBX admin must add [ACL ability](#) "Can" - "Intrusion".

Proceed as follows:

- Mouse over a colleague who is currently on the phone, click on **Options** button (three dots) and select **Listen/ Barge/ Whisper**
- Or right-click on a colleague and select **Listen / Barge / Whisper**, where:
 - **Listen** stands for silent intrusion
 - **Barge** - conference intrusion
 - **Whisper** - partial intrusion

Call pickup / see who is calling

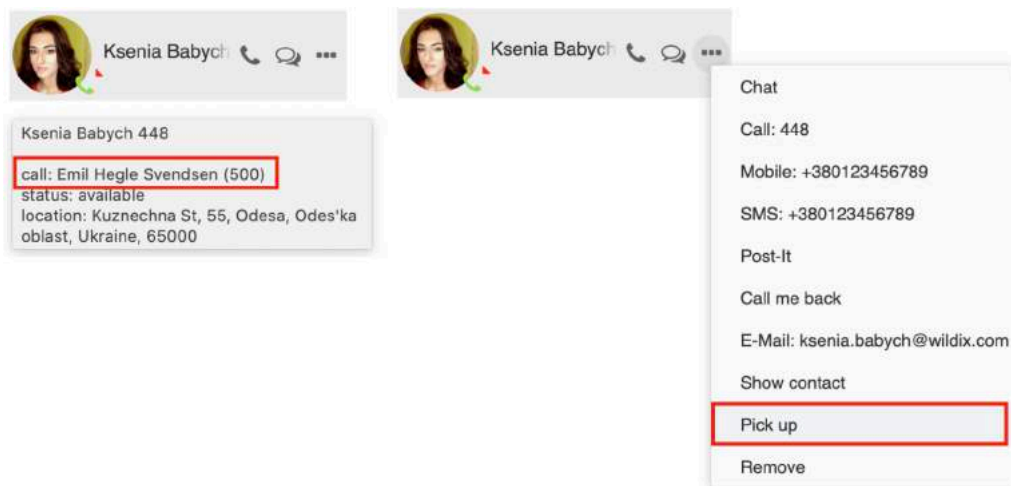
See who is calling:

- Go to the **Colleagues** tab and focus the mouse cursor on the user who has a ringing call / is talking on the phone (same option is available in *Feature keys / Messaging* tab)

Call Pickup:

 Note: only users with certain permissions can pick up calls; to enable the option, the PBX admin must add **ACL ability "Can" - "Call Pickup"**.

- Go to the **Colleagues** tab
- Mouse over a colleague who has a ringing call, click on **Options** button (three dots) and select **Pick up**
- Or right-click on a colleague and select **Pick up**



Video tutorial:

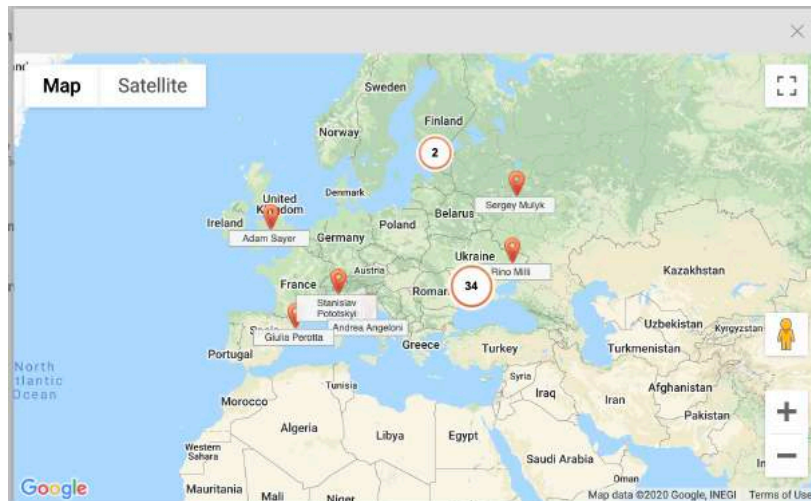
<https://wildix.wistia.com/medias/blwzfnk5b1>

Map view of colleagues

It is possible to view all the colleagues who are connected to Wildix Collaboration and who have enabled location sharing in their browsers, on the geographical map.

From the top menu

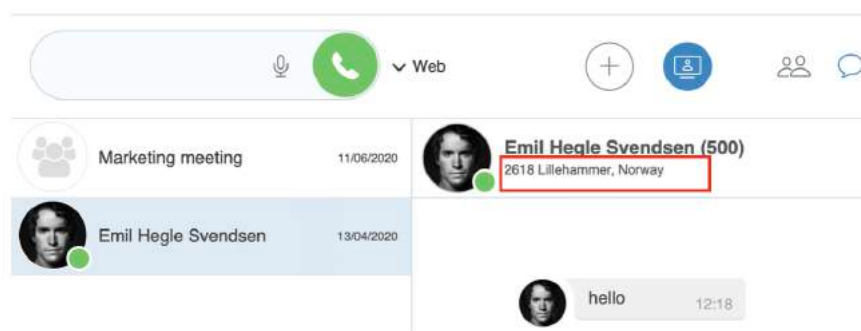
- Select **Other** from the top menu -> **Map View**. All colleagues who enabled location sharing are indicated on the map:



 Note: Maps in Collaboration are available only via *.wildixin.com domain.

From Messaging

- Click on a colleague's geolocation in **Messaging** tab to open a geographical map where the geolocation of that user is indicated:



Instant Messaging

Start a chat session

From Search field:

Enter the colleague name/ extension and select **Chat** from the drop-down menu.

From Colleagues / Feature keys:

- Mouse over a colleague and click on **Chat** icon
- Or right-click on a colleague and select **Chat**

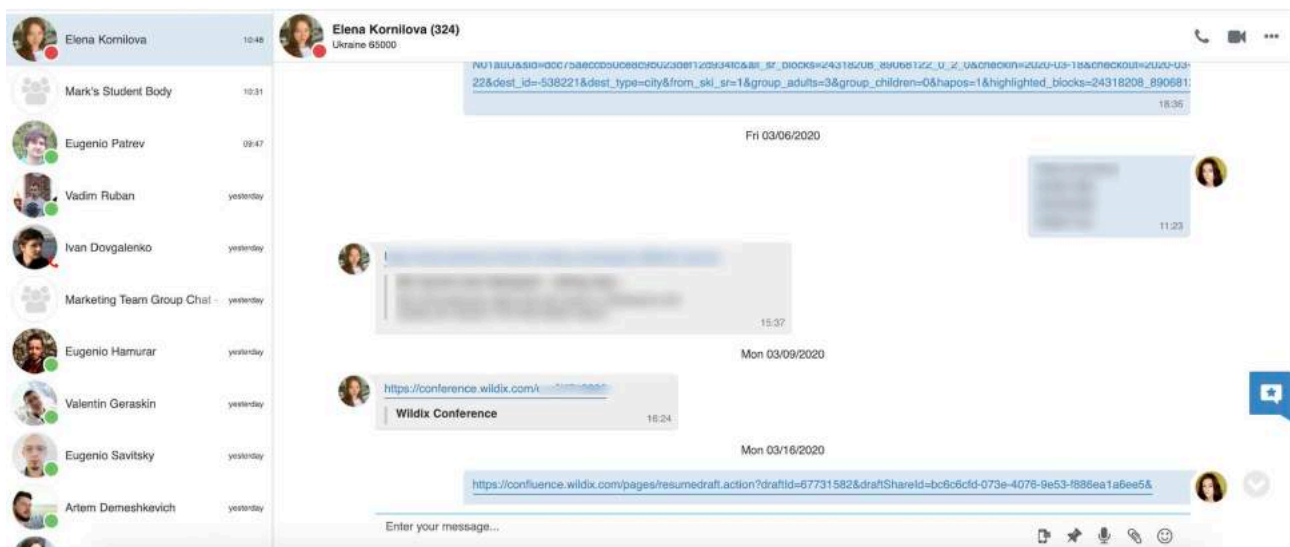
From History:

- Right-click on a colleague and select **Chat**

From call dialog during a call:

- Select **Other** -> **Chat** in call dialog (See Chapter: [Call Management](#))

Messaging tab opens and you can start typing your message and use chat input options:



Use speech recognition: click the **Microphone** icon in the lower right section of the chat session window and start talking, the system transforms your speech into text.

Use emoticons: click on the **Smiley** icon in the lower right section of the chat session window to open the list of emoticons:



 Note: chat input options, except of emoticons, become hidden when you start typing your message.

All open chat sessions are displayed in the *Recents* section (left section of the screen). You can continue a previously started chat session by clicking on a user in the *Recents* section.

Edit the last sent chat message:

It is possible to modify the last sent chat message that contains links, text or emoticons:

- Press **↑ Up arrow** key on your keyboard
- The last sent message appears in the input field
- Update it and press **Enter** key to send

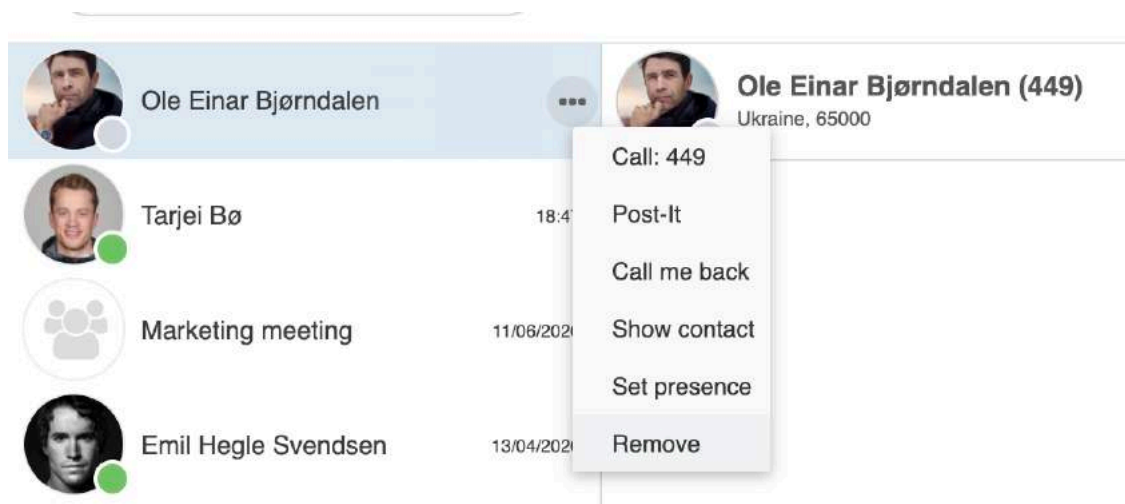
If you need to exit the editing mode without sending changes, you need to delete the entire message from the input field.

 **Limitation:** The feature is not supported on mobile devices and Kite: a remote side receives the modified text as a second message.

Close a chat session:

Go to the **Messaging** tab -> select a user:

- Mouse over a user, click on **Options** button (three dots) and select **Remove**
- Or right-click on a user and select **Remove**:



File transfer

Transfer of files up to 100Mb:

- Supported by all web browser (we recommend using the latest version)
- File preview is supported
- File remains available for download in the chat window

Transfer of files bigger than 100Mb:

- Supported browsers: Chrome, Firefox
- Recipient must accept the file transfer, before the download starts
- File can be downloaded only once

Send a file:

1. Open a chat session with user
2. Click on the **Paperclip** icon in the lower right section of the chat session window
3. Choose file on your PC

**Drag&Drop file transfer**

During a chat session:

- Drag the file from your PC and drop it into the chat session window.

From Messaging tab -> Recents section/ Colleagues tab:

- Drag the file from your PC and drop it onto the colleague

From a clipboard

Copy and paste images from a clipboard:

- To copy an image, right-click on it and select **Copy** or press command+C (macOS)/ Ctrl+C (Windows)
- To paste an image, right-click in chat input field and select **Paste** or press command+V (macOS)/ Ctrl+V (Windows)

Screen Sharing and remote control

OS requirements (for presenter)

- Mac OS X 10.12 and higher
- Windows 7 (64-bit) and higher

 WIService is not supported on macOS 10.11 or lower starting from v 3.4.5. Learn more in [What is WIService guide](#).

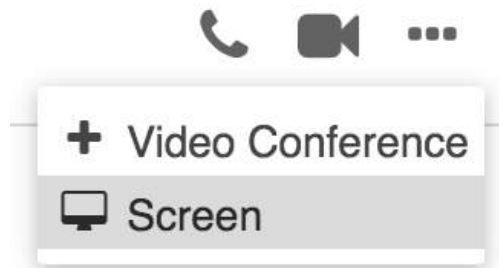
To use screen sharing and remote control, you need to install Wildix Integration Service (WIService).

Download and install Integration service:

- *Collaboration -> Settings -> Extensions, "Integration service"*

Start Screen Sharing

1. Open a chat session with a user
2. Click on **More actions** (three dots) button -> **Screen**



3. Screen sharing launches (screen sharing icon is displayed on the menu bar of your PC) and a red border around the screen indicates its start
4. The other party must accept incoming screen sharing stream:



Viewers can see mouse movements/ pointer during screen sharing stream (available starting from Screen Sharing version 3.2.3).

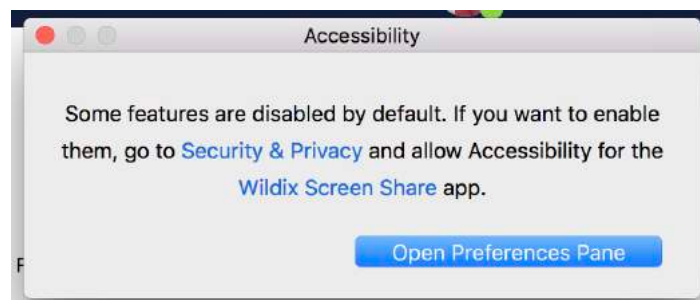
Popups (if enabled) notify you each time viewers are connected and disconnected.

Screen sharing permissions on macOS

Due to the Apple security updates, it is required to add Wildix App to Security & Privacy permissions when prompted to do so:

1. macOS 10.12 and higher

When screen sharing is launched, the following notification is displayed:



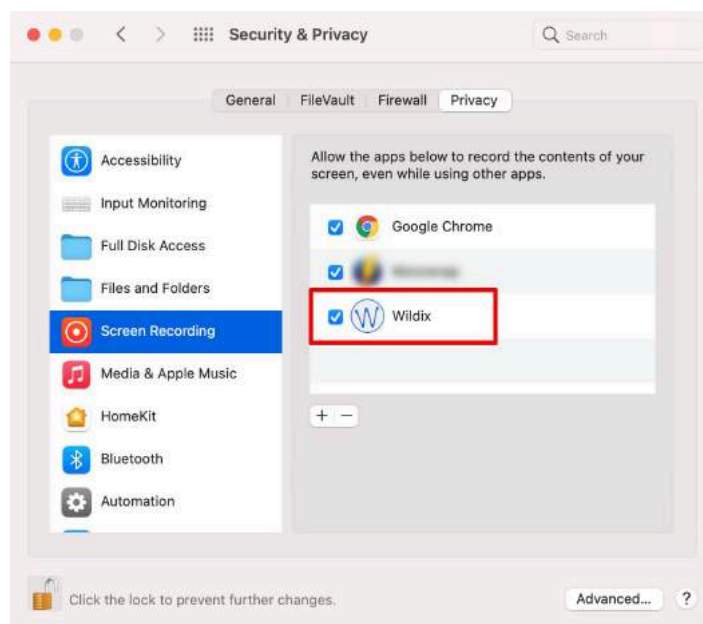
- Click **Open Preferences Pane** to access *Security & Privacy* tab
- Click **+** to add the component to permissions
- Select **Wildix** from Application and click **Open**

2. macOS 10.15

Upon installation of the WIService or at the launch of screen sharing, the following notification appears:



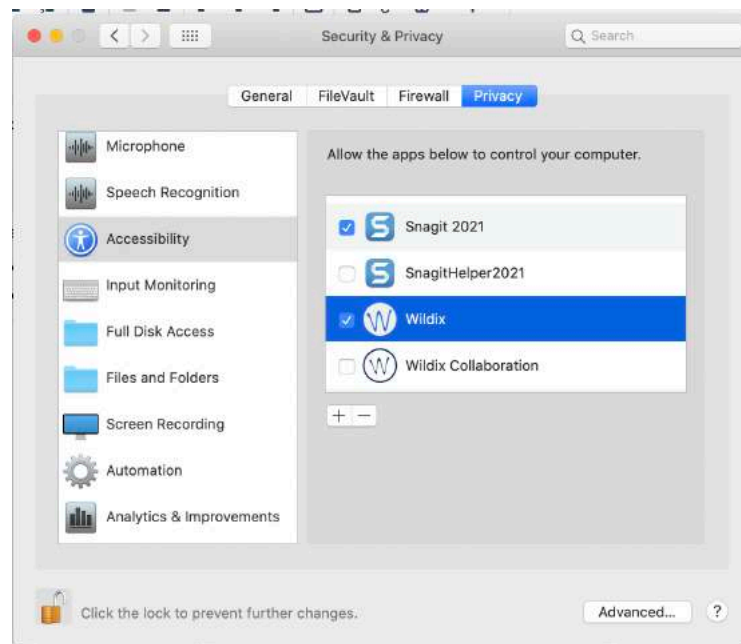
- Go to macOS **System Preferences** -> *Security & Privacy* -> *Privacy*
- Select **Screen Recording** and check off *Wildix*



3. Remote control permissions on macOS Mojave and later versions

In order to allow remote control on macOS Mojave and later, you need to add Wildix to your laptop's permissions:

- Go to System preferences -> *Security & Privacy* -> *Privacy*
- Click **Accessibility** and check *Wildix* to allow remote control

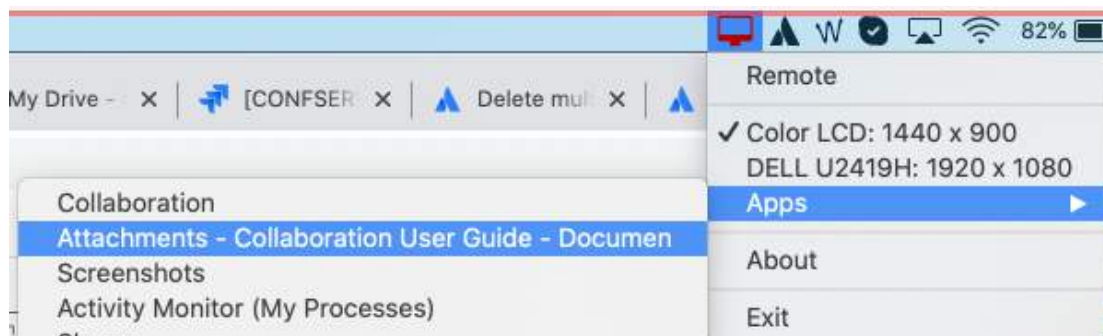


Start screen sharing during a call:

- Select **Other** -> **Screen** in a call dialog (See Chapter: [Call Management](#))

Select the application to share:

- Start a screen sharing session
- From the menu bar (macOS) / taskbar (Windows), click on **Screen** icon -> *Apps* and select which application to share:



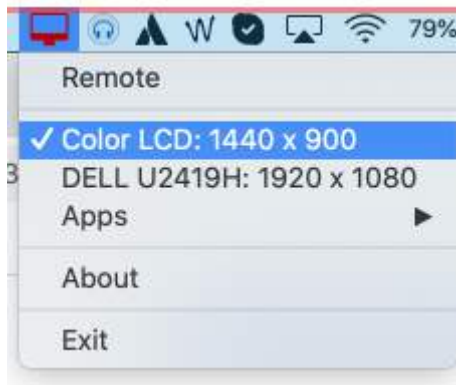
Enable remote control

❗ Remote control is disabled by default.

- Click on the Screen icon in the menu bar and select **Remote**

Monitor selection

If you have extra monitors connected to your PC, you can select the monitor from the menu bar:

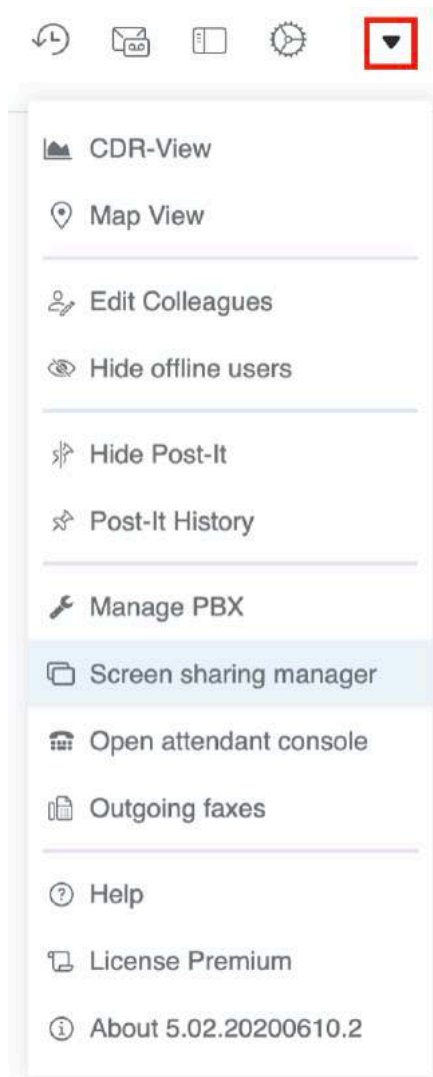


Screen sharing management

Screen sharing to multiple users is supported.

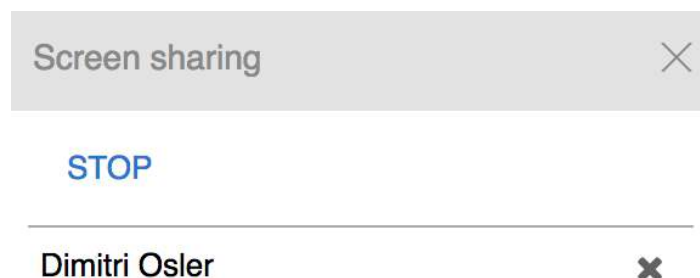
See who is connected and stop screen sharing:

1. Select **Other** in the top menu -> **Screen sharing manager**:



2. You can see the viewers who are currently connected:

- Click **X** in front of the viewer to disconnect this user
- Click **Stop** to disconnect all users



Video tutorial: <https://fast.wistia.com/embed/medias/6l72liuzpr>

Multiuser group chat

Requirement:

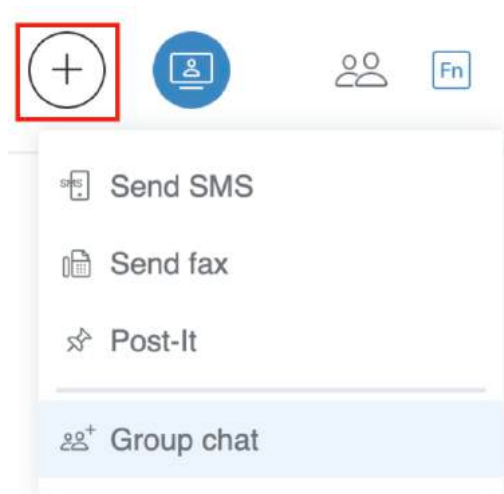
- Check open ports: [Group chat ports](#)

Cloud-stored multiuser chat room with possibility to add up to 500 participants and send pictures/ files.

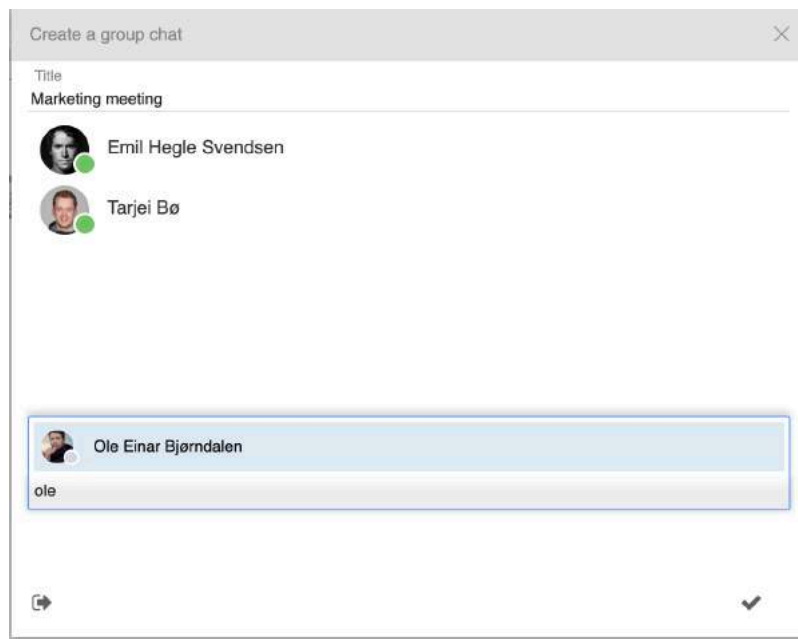
- ⚠ Limitations for cloud-stored group chats:
- Not available for LifeTime/ Per Service PBXs
 - PBX must be accessible via public IP (or custom secure port)
 - Previous group chats will be removed after PBX reboot
 - Impossible to send files bigger than 100Mb
 - Impossible to add more than 100 users at once (you can split it for several times if there is a need to add more than 100 users to one group chat)
 - Not supported on Vision/ SuperVision phones
 - Group chat history is stored for messages not older than 18 months.

Create a chat room:

1. Click on **Add** button -> choose **+ Group chat** from the list:



2. Edit the conference title (optional)
3. Add participants
4. Click the **Tick** icon to create a group chat

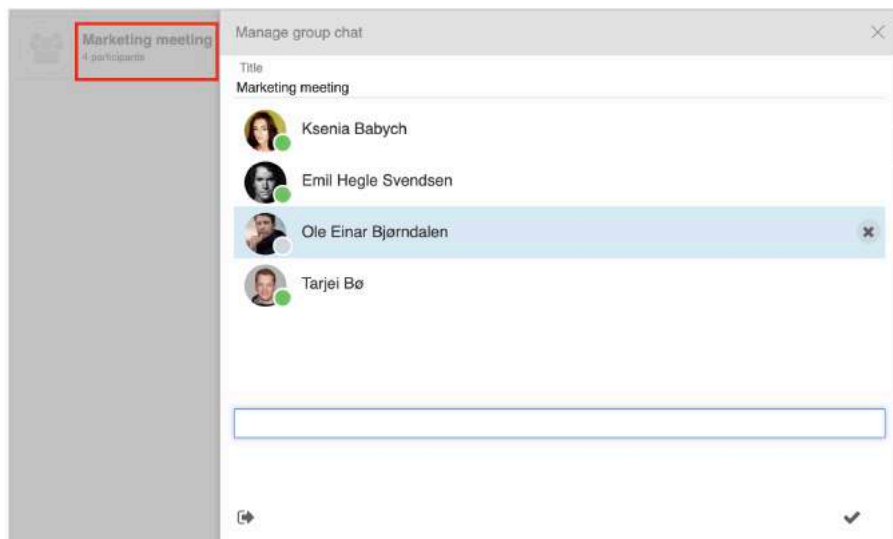


Participants receive conference invitation via chat.

Add / remove users:

Any chat participant can add and remove users. Open the group chat management section by clicking on its title.

- Add user: start typing a participant's name/ extension number in the field and click the **Tick** icon to confirm
- Remove user: mouse over a participant and click on the **x** icon in front of the participant's name

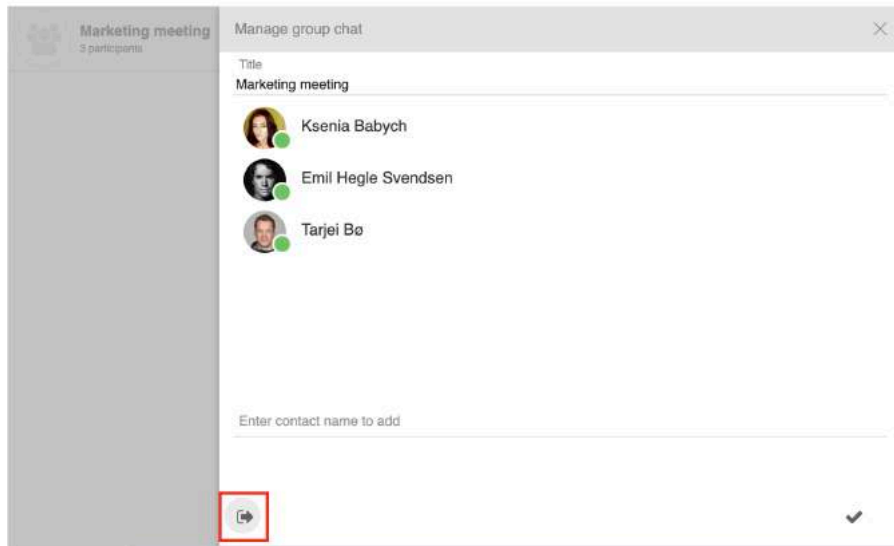


Close the group chat:

Only the group chat manager can close the chat.

Other participants can leave the chat room and can join back only after the manager adds them again.

1. Click on **Logout** icon in the group chat management section
2. Click **OK** to confirm



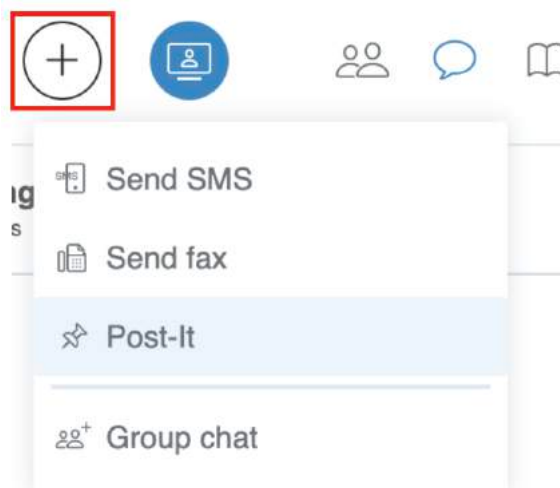
Post-It & Call me back

Post-It

It is possible to send virtual sticky notes to users or post them on your screen as a personal reminder.

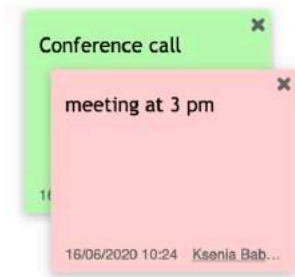
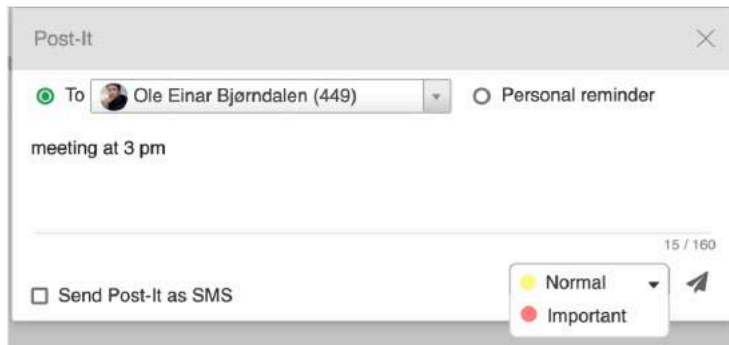
From the top menu:

- Click on **Add** button in the top menu and select **Post-It**:



- To: select the Post-It recipient

- enter the user name / extension into the field *To*
- otherwise tick off “*Personal reminder*” option to post a note on your Collaboration interface
- Input field: enter your text
- Send Post-It as SMS: option is available for Post-It to user and requires a GSM media gateway
- Normal / Important: select the color based on importance:
 - Green (Post-It to user) / Yellow (personal reminder): normal
 - Red: important
- Click the **Paper plane** icon to post a note



From Search field:

- Enter the colleague name / extension and select **Post-It** from the drop-down menu

From Colleagues / Feature keys:

- Mouse over a colleague, click on **Options** button (three dots) and select **Post-It** from the list
- Or right-click on a colleague and select **Post-It**

From Messaging:

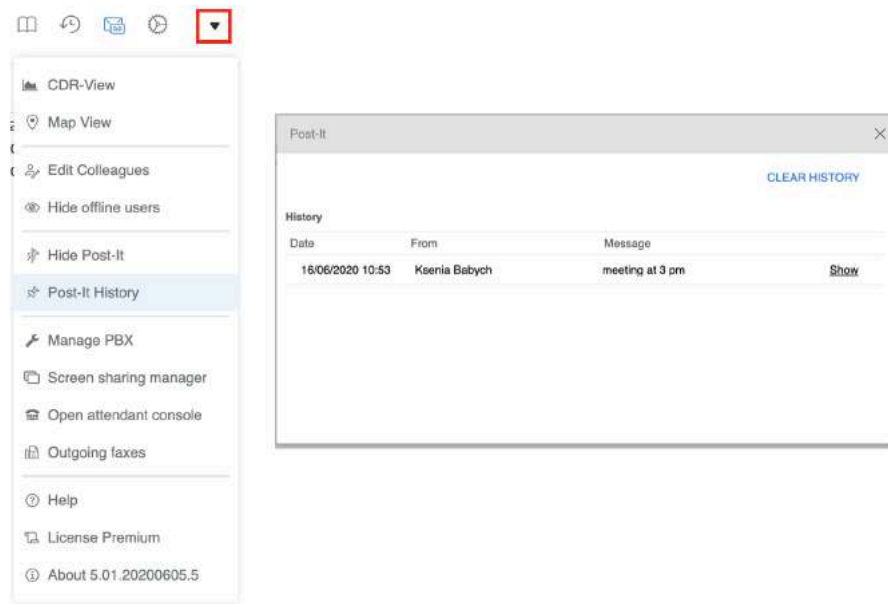
- Click on the **Post-It** icon in the lower right part of the chat session window

Show / Hide Post-It

- Select **Other** in the top menu -> **Hide Post-It / Show Post-It**

Post-It History

- Select **Other** in the top menu -> **Post-It History**



It is possible to:

- show / hide any Post-It previously received from users or sent as personal reminders
- clear Post-It history

Call me back

From Search field:

- Enter the colleague name / extension and select **Call me back** from the drop-down menu

From Colleagues / Feature keys / Messaging tab:

- Mouse over a colleague, click on **Options** button (three dots) and select **Call me back**
- Or right-click on a colleague and select **Call me back**

Call me back Post-It is displayed to the recipient:



Recipient can call back the sender by clicking on the green **Handset** button.

To close Call me back note:

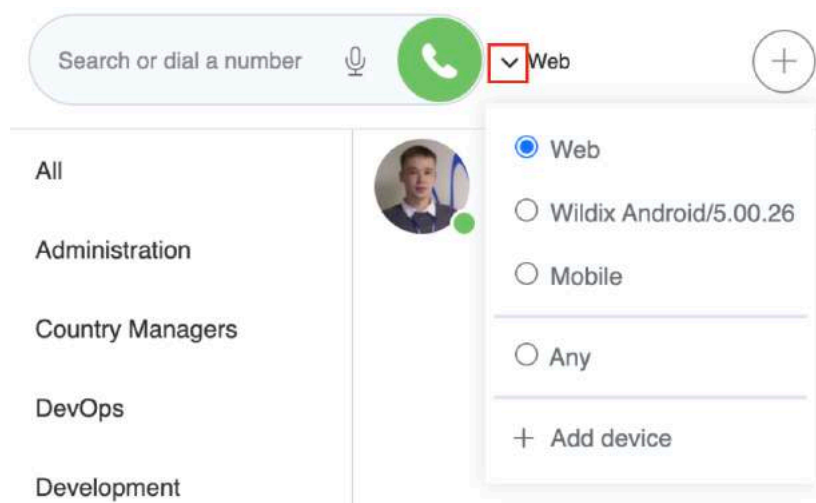
- Click **x** to close the note

Call

Active device for calls

You can make and receive calls directly from Collaboration or control other devices registered to your account, including hardware phones (WP, W-AIR), W-AIR Headsets, smartphone apps (iOS / Android) and mobility extension (mobile phone). The first available device is displayed to a user upon the first login.

Select the active device for making and receiving calls in the top menu:



 Note: when selected device becomes unavailable, “Web phone” is automatically selected.

Supported devices:

- Web: make and receive calls directly from Collaboration
- WP, WorkForce, WelcomeConsole, Vision, SuperVision, W-AIR: hardware phones
- Wildix iOS/Android client: apps installed on smartphones
- Mobile number: mobility extension number of a user
- Any: possibility to select an active device upon placing / receiving a call
- W-AIR Headset: possibility to add a device for handling calls. Refer to [W-AIR Headset Manual](#) for detailed information

 Note: you can switch active device during a call by clicking on Continuity in a call dialog window (see chapter [Switch active device during a call](#)) or dialing Continuity Feature Code (*5 on the new device, like that you can pick up an active call using this device; otherwise *5 on the current device, like that other devices start ringing).

Incoming calls

If you have several devices registered to your account, it is possible to decide whether all your devices must ring or only the active one:

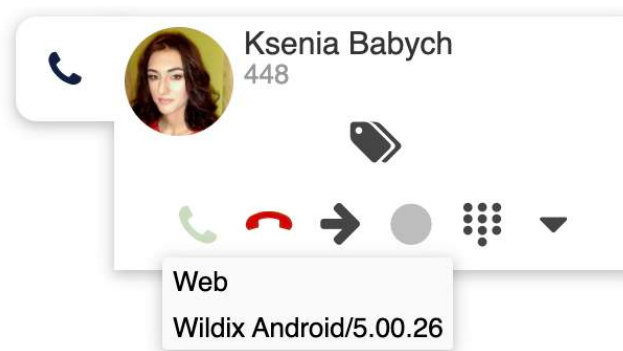
Go to *Collaboration Settings -> Personal*:

- *Ring only active device enabled*: only active device selected in the top menu of Collaboration rings (ringer is muted on other devices)
- *Ring only active device disabled*: all active devices ring

Demo video:

<https://www.youtube.com/watch?v=KYxlvfWmp5g>

“Any” option makes it possible to select the device by clicking on the green **Handset** button in the call dialog, the moment you receive an incoming call:



Outgoing calls

In case you have selected WP / WorkForce / WelcomeConsole / Vision / SuperVision / W-AIR / iOS/Android / Mobility device, outgoing calls are placed using this device.

In case you select “Any” option, once you place an outgoing call from Collaboration interface:

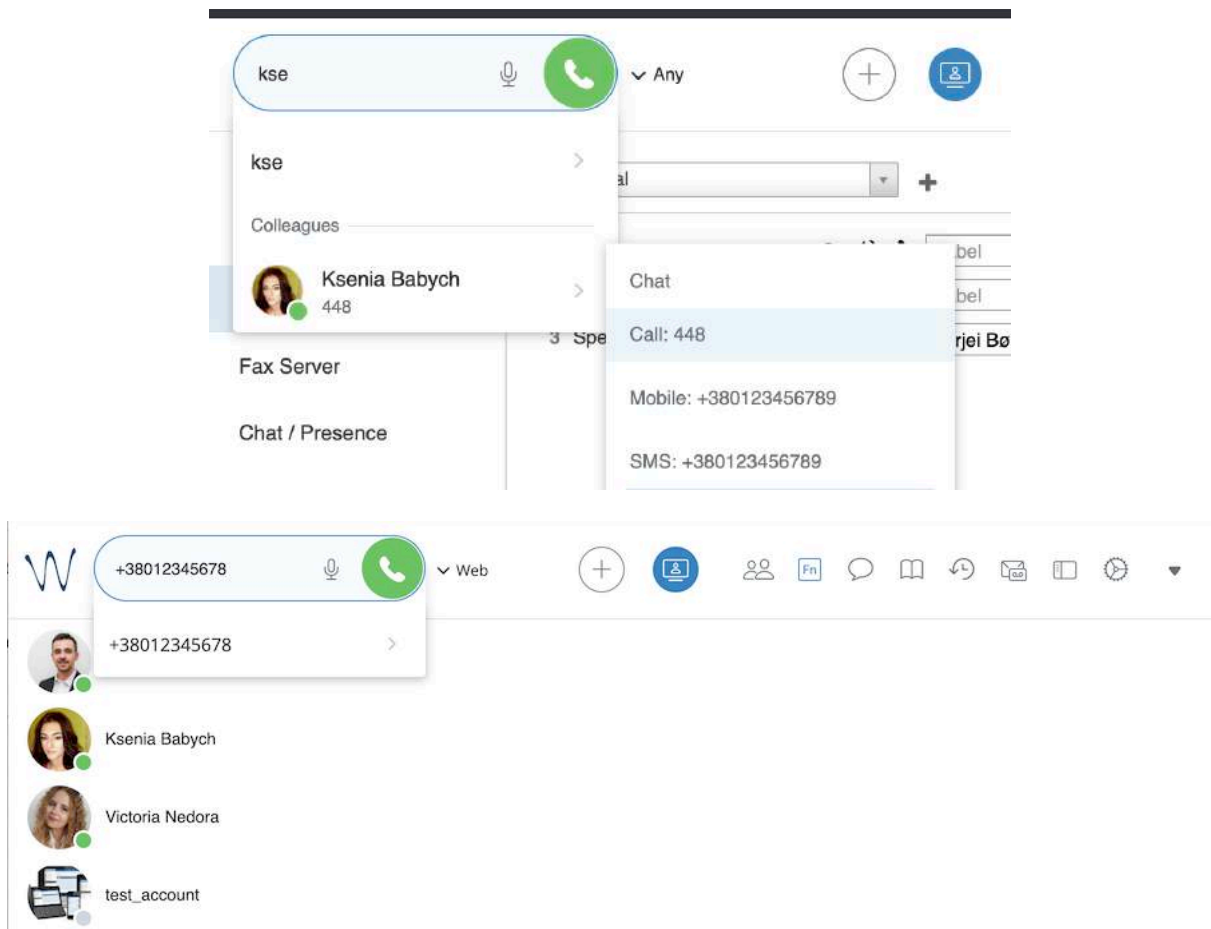
- you receive an incoming call to all your devices (answer the call from your preferred device)
- after you answer, an outgoing call is placed to the number you dialed

Make a call / Search for contact

Before making a call, make sure the correct active device is selected in the top menu.

From search field:

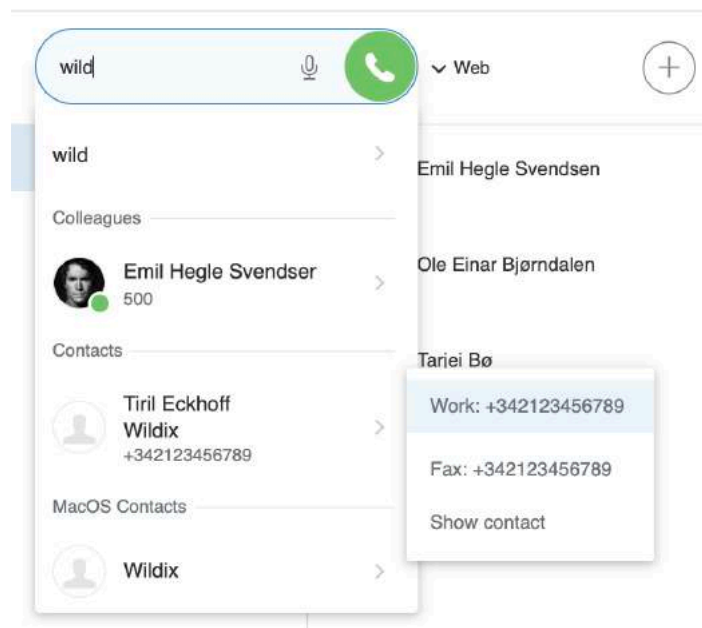
- Enter the name (user name or contact) or phone number (extension number or any external phone number) and select **Call: [number]** from the drop-down menu:



It is possible to use speech recognition for search: click on the **Microphone** icon (make sure the microphone is connected to your PC or your PC has a built-in microphone) and start talking, the system automatically transforms your speech into text.

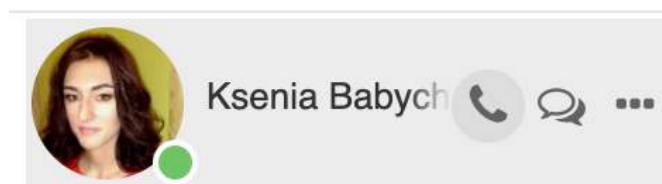
In case you would like to call a number from your contacts:

- Enter the name/ number/ company name and select a number you'd like to call:



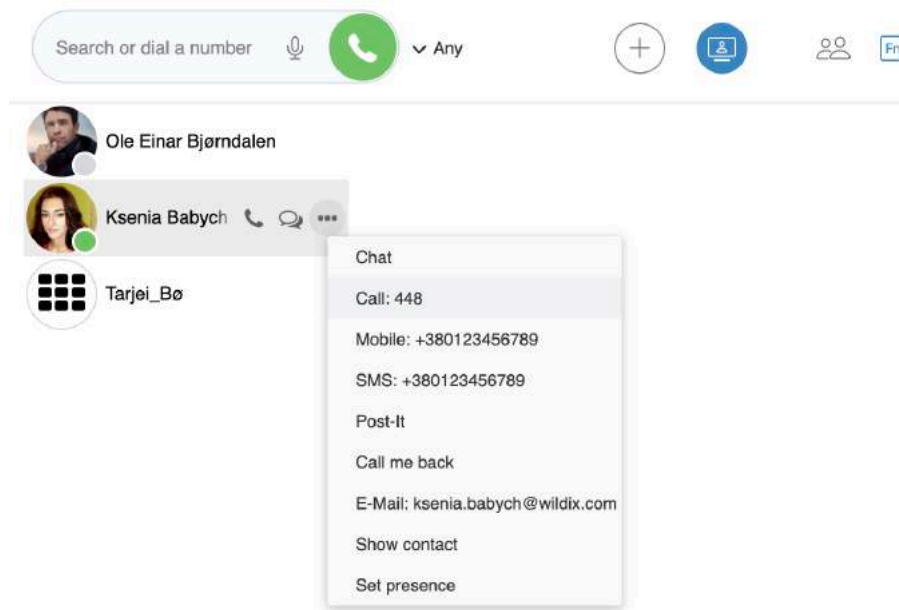
From Colleagues:

- Mouse over a colleague and click on the **Handset** icon
- Or mouse over a colleague, click on **Options** button (three dots) and select **Call**
- Or right-click on a colleague and select **Call**



From Fn keys:

- Mouse over a colleague and click on the **Handset** icon
- Or mouse over a colleague, click on **Options** button (three dots) and select **Call**
- Or right-click on a colleague and select **Call**

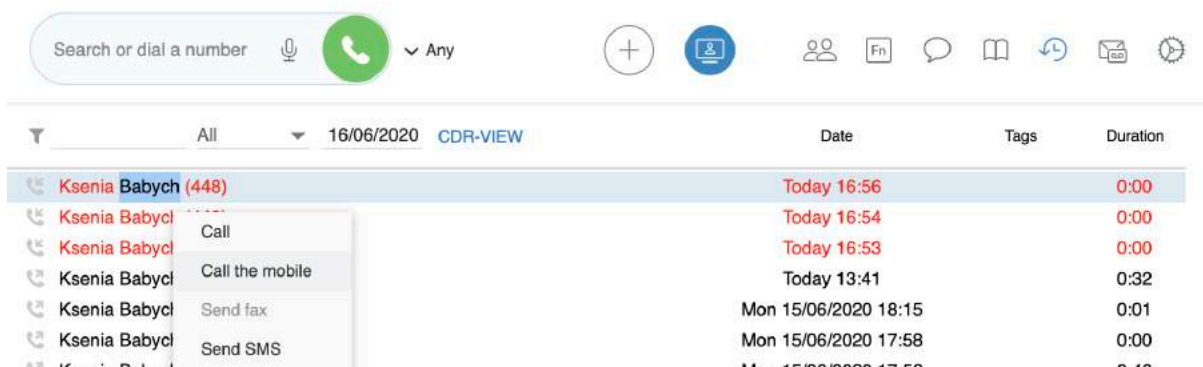


From Messaging:

- Click on the **Handset** icon in the upper right part of the chat session window
- Or mouse over a colleague, click on **Options** button (three dots) and select **Call**
- Or right-click on a colleague and select **Call**

From History:

- Right-click on an entry and select **Call / Call the mobile**



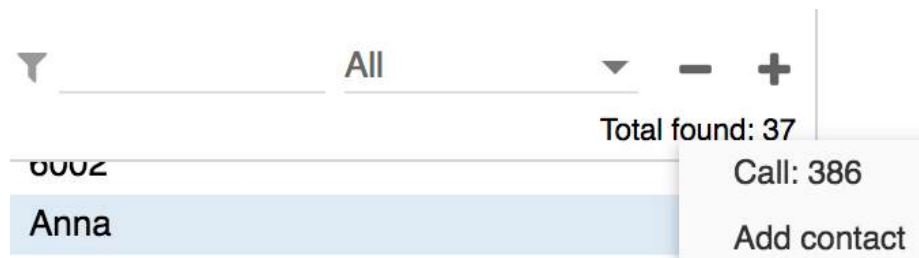
Filter	All	16/06/2020	CDR-VIEW	Date	Tags	Duration
	Ksenia Babych (448)			Today 16:56		0:00
	Ksenia Babych			Today 16:54		0:00
	Ksenia Babych			Today 16:53		0:00
	Ksenia Babych			Today 13:41		0:32
	Ksenia Babych			Mon 15/06/2020 18:15		0:01
	Ksenia Babych			Mon 15/06/2020 17:58		0:00

From Phonebook:

- Find a contact and click on the number you wish to call



- Otherwise right-click on a contact from the right section of the screen and select **Call**



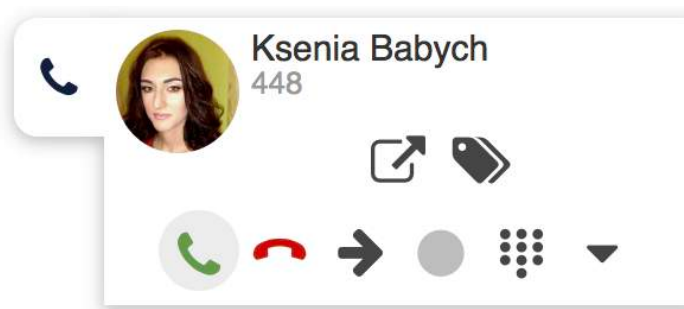
From Voicemail:

- Right-click on an entry and select **Call**

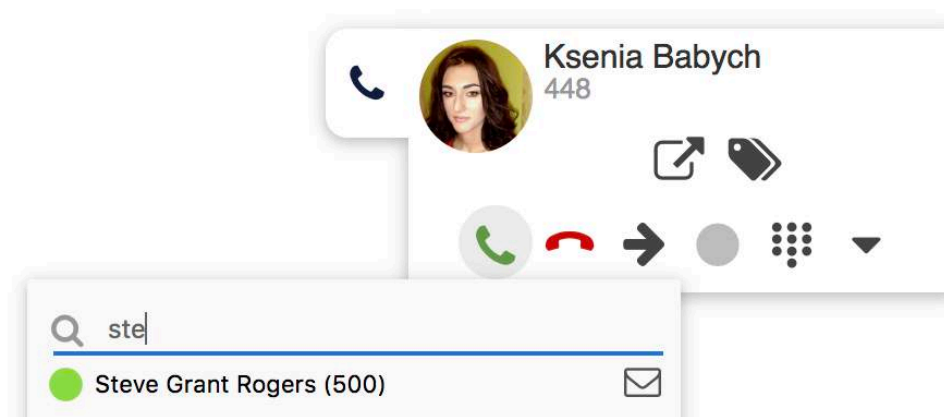
Answer a call

In case you have several devices registered to your account, you can decide whether all your devices must ring, or only the active one. See chapter: [Active device for calls](#).

A call dialog window is displayed when there is an incoming call:



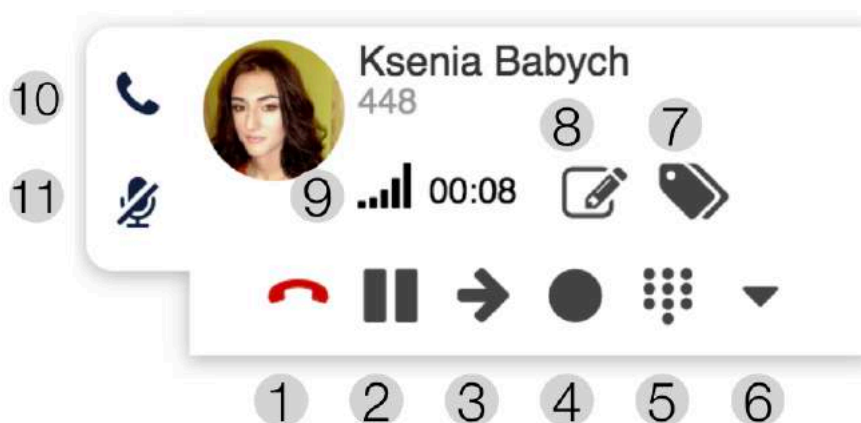
- To answer a call: click the green **Handset** icon
- To decline a call: click the **Hang up** (red) icon
- To forward a call without answering: click **Arrow** icon, select the contact to forward a call to (using search)/ or transfer a call to Voicemail:



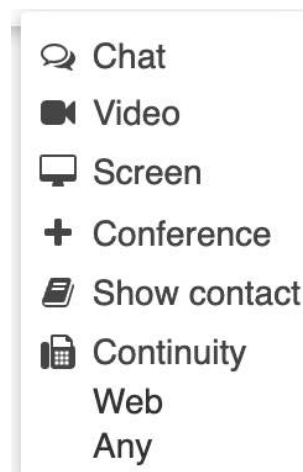
You can set up automatic call forwarding based on user status (available, DND, away) and call type (internal, external, whitelist, blacklist). See chapter: [Features](#).

Call management

You can manage a call directly from call dialog window:



- 1 - Hang up
- 2 - Hold/ resume
- 3 - Transfer
- 4 - Call recording
- 5 - Dialpad / Send DTMFs
- 6 - Other (expanded):



 If you have more than one webcam, you can change the active webcam for video streaming in your browser permissions.

- 7 - Add tags (See chapter: [Setting tags](#))
- 8 - Add notes, not available for calls between colleagues (See chapter: [Contact notes](#))
- 9 - Call quality (shown only in case of a single call)
- 10 - Hide/ display a call dialog window:



- 11 - Mute/ unmute your microphone. Mute icon is crossed out by default (flashing when muted)

Hold/ second call

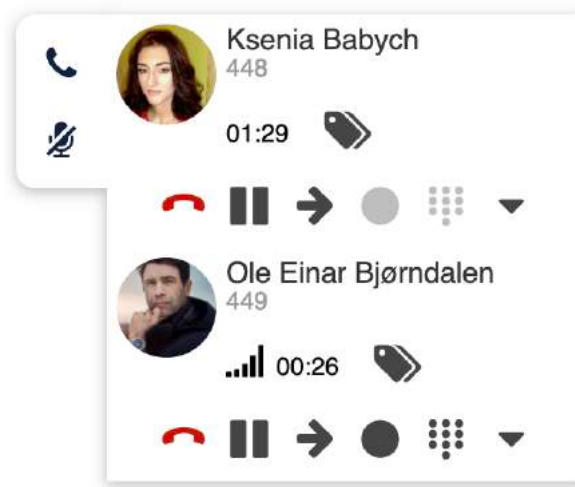
Click on the **Hold** icon during a call to put a call on hold/ to resume a call. The second party hears music on hold (set up on the WMS side).

You can make/ receive more than one call at a time if "*Call waiting*" is enabled in *Collaboration Settings* -> [Features](#) for the current call type and user status.

 Note: during a call you are notified of a new incoming call by call waiting tone (short beeps).

When you make / answer a second call, the current call is automatically put on hold.

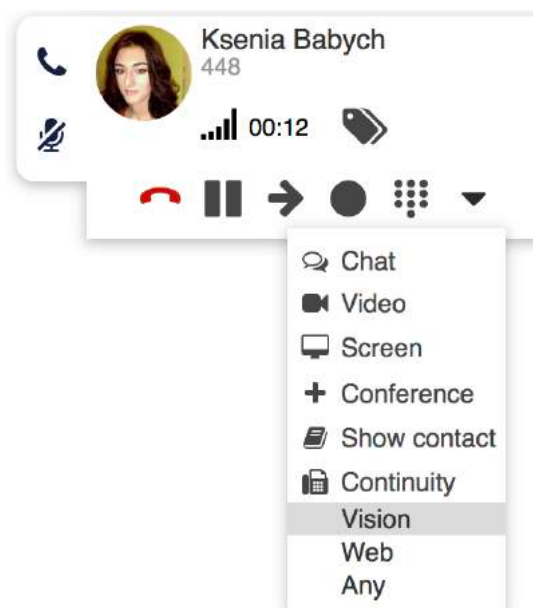
It is possible to swap between an active call and a call on hold by pressing the **Hold** icon (*Hold* icon is blinking in for the call which is currently on hold):



Switch active device during a call

In case you have more than one device registered to your account, you can switch them during a call using Continuity option in a call dialog window:

- Click **Other** -> **Continuity** and select the device you want to continue the call on
- The call is automatically picked up on the selected device

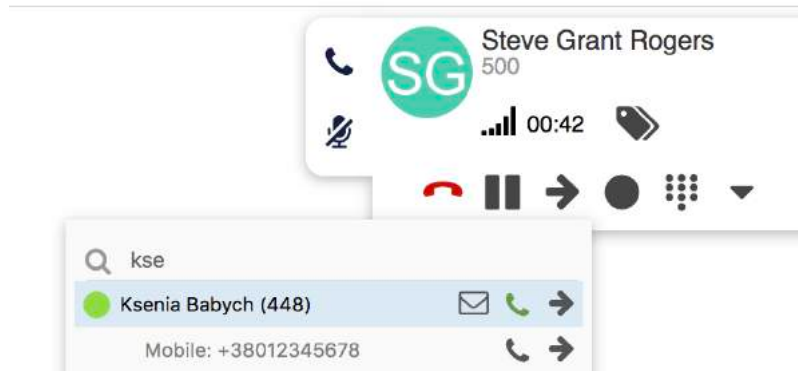


- To switch the device back to Web, dial Continuity Feature Code *5 (refer to [Feature Codes](#) Instruction for more information)

Call transfer

To transfer a call to another user:

1. During a call, click on the **Transfer** icon
2. Enter the contact name/ number (user status and additional phone numbers are displayed)
3. Click on the **Envelope** icon to transfer a call to Voicemail, the **Handset** icon for attended transfer and **Arrow** for blind transfer, in front of the number you wish to dial:



Drag&Drop Call transfer

Drag the Caller Name from the call dialog window and drop it onto the desired user in **Colleagues/ Messaging** tab.

Video tutorials

Call transfer: <https://wildix.wistia.com/medias/ha0ew70fe3>

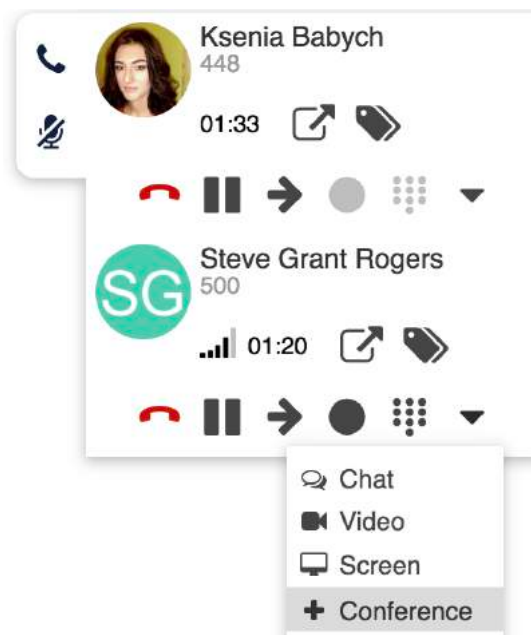
Forward to Voicemail: <https://wildix.wistia.com/medias/ec07tbkzn1>

Another video tutorial: [Call transfer via BLF keys.](#)

Conference call

It is possible to add users to call conference via Wildix Collaboration.

- When you have two calls, click **Other** -> **Conference** from one of the call dialogs to merge calls
- To invite more parties: make a new call and click **Conference** from the call dialog window:



To close the conference, wait till other parties hang up. Otherwise, the conference manager receives an automatic callback after 5 seconds from each party who has not hung up.

 Note: if you were looking for chat conference in Collaboration, read more: [Multiuser group chat](#).

Video tutorial: <https://wildix.wistia.com/medias/wvj6o9wvjo>

Video call

Video in Collaboration is fully supported on Chrome browser (WebRTC video).

2-way video is currently fully supported between Collaboration on Chrome and:

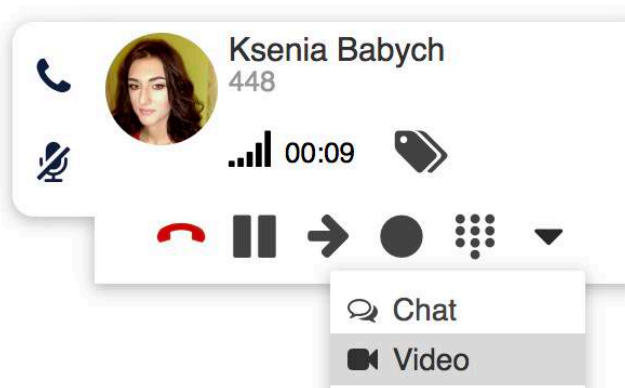
- Collaboration on Chrome
- Collaboration on Firefox
- Kite user on Chrome
- Kite user on Firefox
- Vision/ SuperVision
- iOS / Android client
- Video intercoms / IP webcams

For more information about Intercoms integration, check documentation in the section [Doorphone integrations](#).

For the details of how to configure intercoms for sending video stream and adding an unlock button, check the online documentation: [Intercoms integration with Wildix - Video before answer and Unlock button](#).

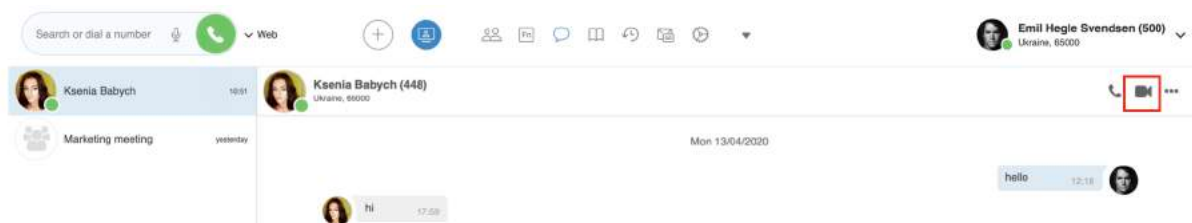
Start video streaming during a call:

- Click **Other** -> **Video** from the call dialog:



Start video call during chat:

- **Video** icon is available in the **Messaging** menu (upper right corner). By clicking **Video**, audio call is started automatically with video:



Record a call

During a call click **Call recording** icon to start / stop call recording.

Note: you can also dial Feature Code Record (*1) during a call to start / stop call recording. To pause/ resume call recording, use Feature Code Pause Recording (*2). Consult [Feature Codes and Pre answer Services Guide](#) for details.

Call recordings are sent to a user via email and can be accessed later on via CDR-View and Collaboration -> [History](#).

Note: The PBX admin can forbid access to call recordings by adding the [ACL ability](#) "Cannot" - "See call recordings".

Video tutorial: <https://wildix.wistia.com/medias/01plo8c4yu>

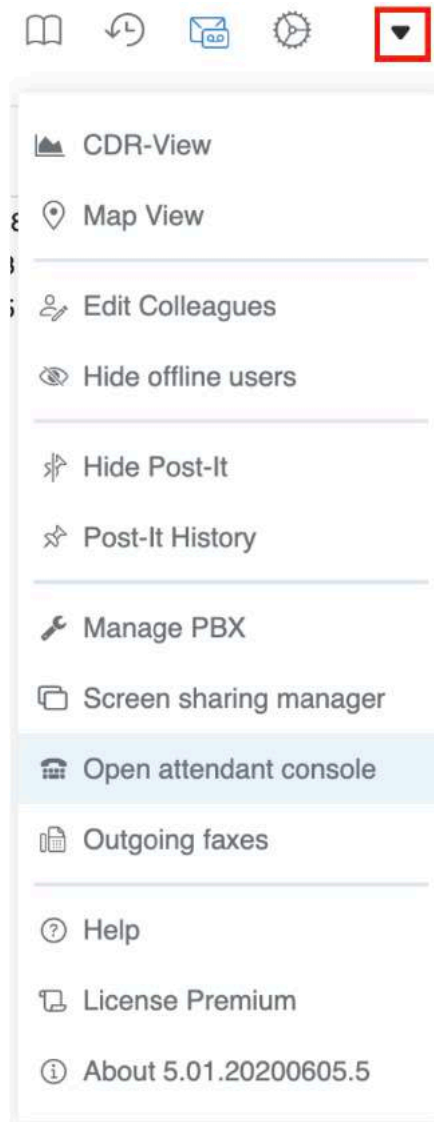
Attendant Console

Attendant Console is an extension for call agents allowing them to monitor and manage of up to 20 lines simultaneously using a mouse or a keyboard.

 Note: Attendant Console supports assistive hardware and software for visually impaired users, for detailed information, read the brochure: <https://drive.google.com/drive/u/1/folders/1JCqn4EhaqGsRToeacUjqkPs0TnGdz-gH>

Open Attendant Console:

- Click **Other** from the top menu and select **Open attendant console**:



Set up a shortcut to open Attendant Console:

- Go to *Collaboration Settings* -> *Personal*, "Open Attendant Console"
- Enter a combination of keys. By default it is set to "Alt+Shift+A"

Call management via soft keys:

- When you have active calls, click on the quick buttons (**Answer, Hangup, Hold, Transfer, Decline, Record**) relative to each line to manage the call:

#	status	Caller name	Duration	
Line 1		Robert Bruce Banner (449)	00:47	Hangup Hold Transfer Record DTMF
Line 2		Steve Grant Rogers (500)		Answer Decline Forward
Line 3				

Call management via numeric keypad:

- Click **Help** to view the list of the hotkeys that allow you to manage calls via a numeric keypad:

Hotkeys	
Alt+Shift+A	- Attendant console
enter	- answer
+	- new call
-	- hangup
*	- transfer
/	- complete transfer
0	- hold call
1 - 9	- answer / resume
Ctrl+(0 - 9)	- (10-19) answer / resume
Alt+Shift+R	- record
D	- DTMF

Make a call

- Press **+**
- Enter the name / number (internal / external)/ organization (company) name into the search field
- Press **Enter**

If a contact has several phone numbers, use the arrow keys of your keyboard to select the right one:

New call


Ksenia Babych (448)

Duration
Mobile: +380123456789

Answer a call

- Press **Enter** to answer an incoming call in case you do not have active calls or your calls are on hold

Line management

- Press **0** to put a call on hold
- Press the digit corresponding to the line to resume a call / to answer a new incoming call:
 - **1-9** for lines 1-9
 - **Ctrl+(0-9)** for lines 10-19

Hang up

- Press **-** to hang up an active call

Attended transfer

Transfer a call after consulting the recipient:

1. During a call make a new call to the recipient of call transfer
2. Wait till the third party answers
3. Press ***** and select the call using arrow buttons of your keyboard
4. Press **Enter** to transfer the call



Blind transfer

Transfer a call without consulting the recipient:

1. During a call press *****
2. Enter the name / number/ organization (company) name into the field
3. Press **/** to transfer the call

Record a call

- Press **Alt+Shift+R** to start/ stop call recording during a call

Fax / SMS

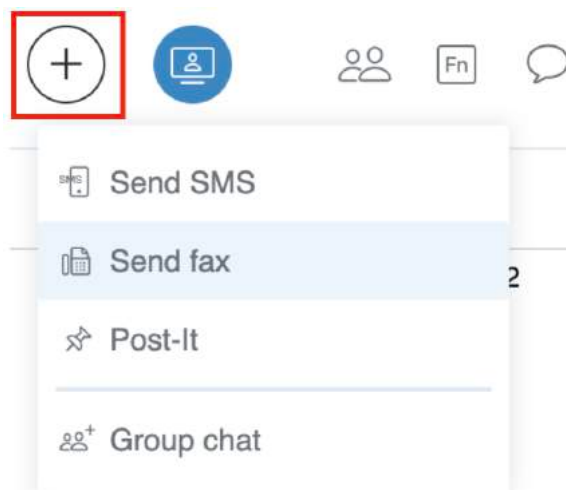


Prerequisites: Fax Server settings must be configured on the WMS side; for SMS sending, GSM gateway is required.

Fax

From the top menu:

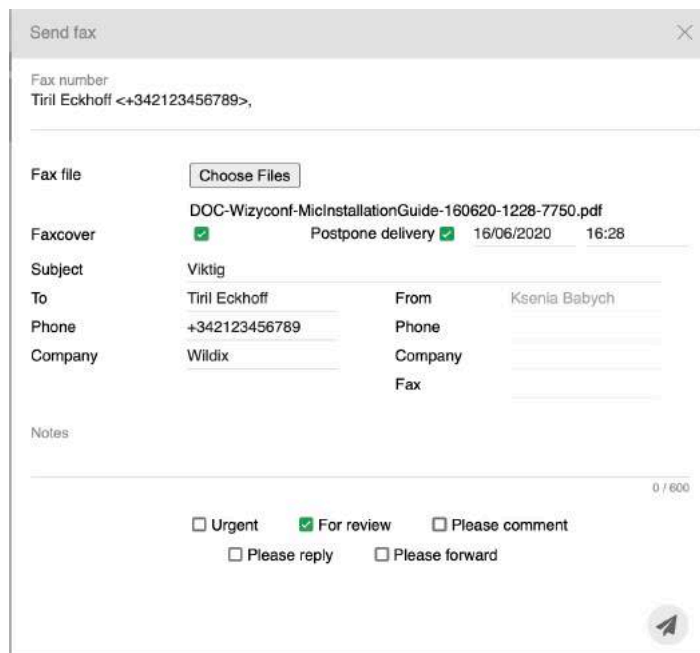
1. Click on **Add** button
2. Choose **Send fax** from the list



3. Fill in the following information:

- *Fax number*: enter the fax recipient name / number (it is possible to enter multiple numbers separated by comma)
- *Fax file*: choose file on your PC
- *Faxcover*: check the box to include the fax cover and edit fax cover settings (See chapter: [Fax Server](#))
- *Postpone delivery*: tick the box and select the date to schedule fax sending (optional)

4. Click on the **Paper plane** icon to send a fax:




Notes:

- fax delivery status is notified via email

- history of faxes can be consulted in Collaboration -> *History* (see Chapter [Download faxes and call recordings](#))

From Search field:

- Enter the contact name / number / company name and select **Fax:[number]** from the drop-down menu

From Phonebook:

- Select a contact and click on the fax number

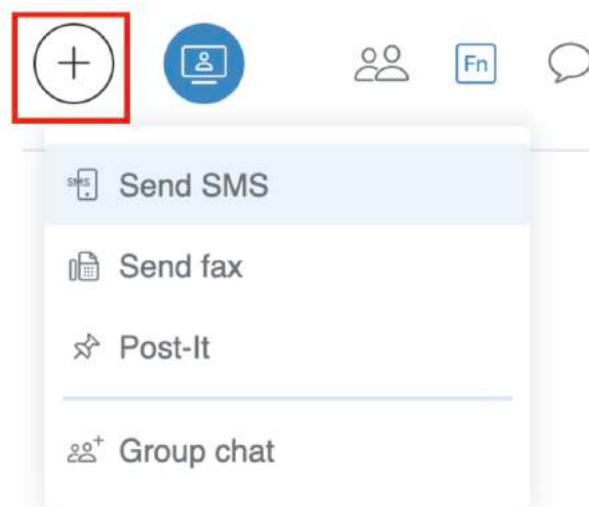
From History:

- Right-click on an entry and select **Send fax**

SMS

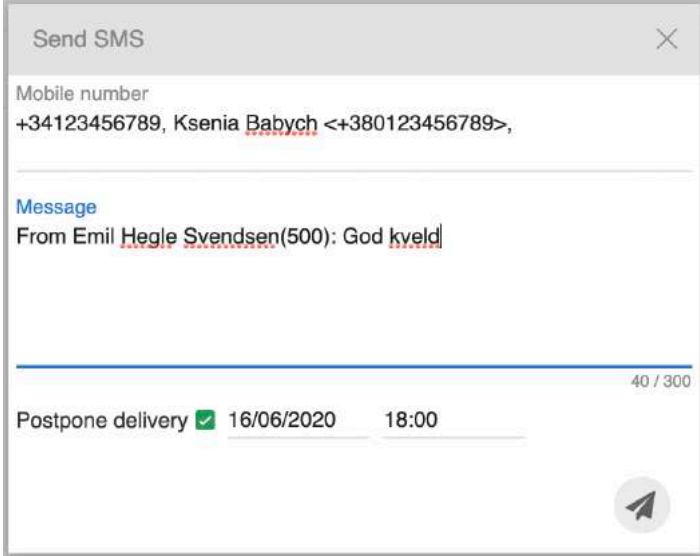
From the top menu:

1. Click on **Add** button
2. Choose **Send SMS** from the list

**3. Fill in the following information:**

- *Mobile number*: enter the contact name / number (it is possible to enter multiple numbers separated by comma)
- *Message*: enter your message
- *Postpone delivery*: tick the box and select the date to schedule SMS sending

4. Click the **Paper plane icon to send SMS:**


From Search field:

- Enter the contact name / number / company name and select **SMS:[number]** from the drop-down menu

From History:

- Right-click on an entry and select **Send SMS**

From Messaging:

- Click **Send SMS** icon in the lower right part of the screen of the chat session with user

Settings

Go to Collaboration -> *Settings*.

To apply changes, click **Save** on each page of Collaboration Settings.

Personal

- Password: edit your password for access to Collaboration
- Two-factor authentication: you can enable 2 factor authentication (2FA), which adds an extra layer of security to your account. In case you enable it, you will have to provide two pieces of information each time you login: your login and password + the code generated by an external application of your choice (Google Authenticator, Windows Authenticator, Free OTP or other). Read more in chapter [Two-factor authentication \(2FA\)](#)
- Web Push: enable/ disable web push notifications (only for Chrome browser). This option is enabled by default for new users:
 - Feature works if PBX can be accessed via domain with valid certificate
 - Chrome must be running (otherwise, you receive notifications when you open Chrome)

- Web Push is turned off after logout, but does not unsubscribe from web push notifications
- User who enabled Web push appears as online even when Collaboration is closed

It is possible to answer/ refuse a call in push notification:

On MacOS:

- Press **More** to be able to **Answer/ Reject** a call
- To apply this change, it's necessary to restart the browser after the update

On Windows OS:

- Press **Answer** or **Reject** directly

Video tutorial: <https://wildix.wistia.com/medias/sy0a2fa4hs>

- E-mail: used for email notifications about new Voicemails, missed calls, unread chat messages, call recordings, fax reports etc
- Mobile: mobile number for Mobility extension which allows you to make and receive calls via Wildix PBX using your mobile phone
- Language: selected language is applied for Collaboration user interface, system sounds (Voicemail, IVR prompts, etc), WP4X0
- Picture: edit picture (See chapter: [User picture](#))
- Date format: select date and time format to be used in Collaboration (*Messaging, History* pages, CDR-View etc) and on Wildix devices except W-AIR handsets (must be set up on a device)

 Note: Wildix devices support 2 date formats: "www dd mmm" and "www dd mmm". Depending on the selected format in Collaboration (European: "dd/mm/yyyy", "dd mmm yyyy", "dd-mm-yyyy", "dd.mm.yyyy" or US: "mmm dd yyyy"/ "mm/dd/yyyy"/ "mm-dd-yyyy"), the date can be displayed as, for example, "Tue 6 Nov" or "Tue Nov 6".

- Ring only active device: check the box to make only the active device ring (ringer is muted on other devices; see chapter: [Active device for calls](#))
- Dark theme: turn the toggle on to enable Dark mode in Collaboration
- Popup URL / APP: enable the system to open an application / a web page upon receiving / placing a call; click on the question mark to view the prompt (more info: [How to set up Popup URL/ App](#))
- Dialing hot key: set up shortcut for click2call from applications / web pages (F11 by default).

 Note for macOS: dialing hot key is available starting from WIService v. 2.11.4. Make sure "Wildix" is added to Accessibility permissions in macOS Security & Privacy settings.

- To enable: install Integration Service from Collaboration *Settings* -> *Extensions* and refresh Collaboration
- To make a call: select a phone number and press the key combination (external line prefix is added to phone numbers longer than 7 digits which do not start with "+"). The call is placed via an active device selected in Collaboration
- Open attendant console: shortcut to open [Attendant Console](#)

- Web CRM: integration with Web applications allows opening of a web application inside Collaboration (integration information for web developers: <https://github.com/Wildix/WebCRM>). The embedded CRM can receive events (new call) and request actions (generate call).

 Note: The WebCRM must support being opened from an iframe.

Two-factor authentication (2FA)

 Note: the PBX admin can forbid disabling/ enabling 2FA by adding [ACL ability](#) "Can/ Cannot" - "Disable two factor authentication".

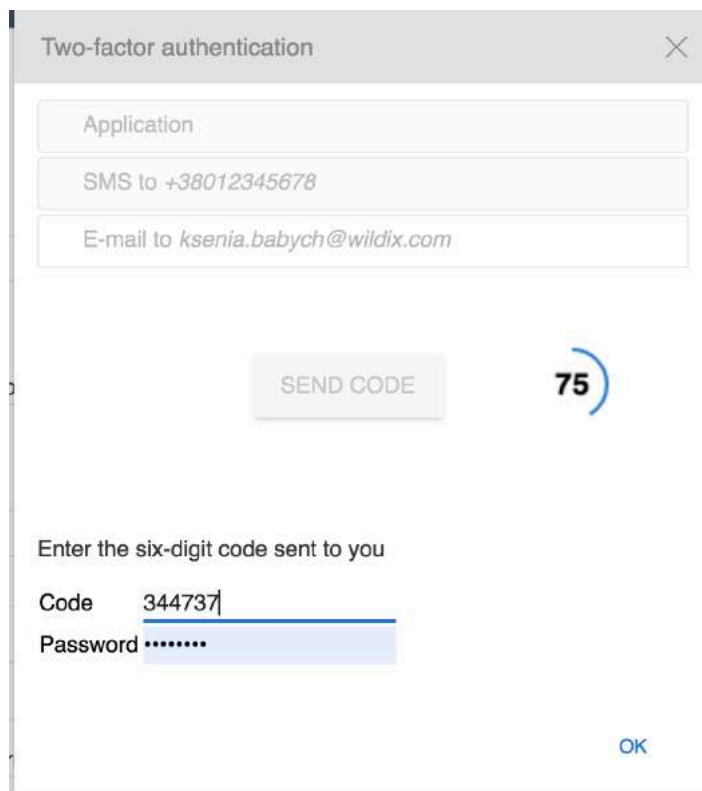
Via SMS/ email

Requirements:

- Mobile number/ email address must be present in *Settings -> Personal*
- GSM Media Gateway to use 2FA via SMS

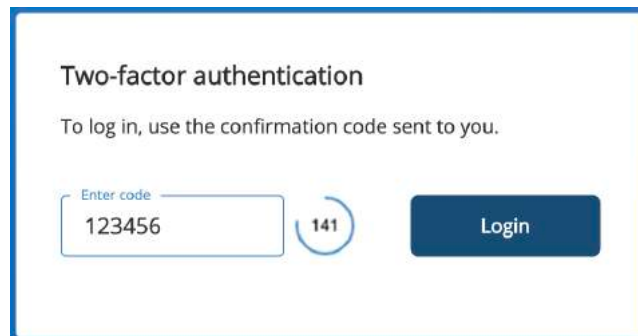
Steps to enable 2FA:

1. Click on the **Pencil** icon In Collaboration *Settings -> Personal*, near "Two factor authentication"
2. Select one of options: **Application** (see the detailed description below), **SMS to/ E-mail to** and click **SEND CODE**
3. After receiving the code to your mobile phone/ email, enter the 6-digit code into Collaboration and your password for access to Collaboration:



4. Click **OK**

The next time you login, you are required to enter a code sent to your app/ mobile number/ email after you provide your login and password for access to Collaboration:



The image shows a login interface for two-factor authentication. It has a title 'Two-factor authentication' and a subtitle 'To log in, use the confirmation code sent to you.' Below this, there is a text input field labeled 'Enter code' containing the number '123456'. To the right of the input field is a circular timer icon showing '141'. To the right of the timer is a dark blue button labeled 'Login'.

 The feature is also supported by Vision/ SuperVision and WP600A(CG) starting from version 2.9.98.

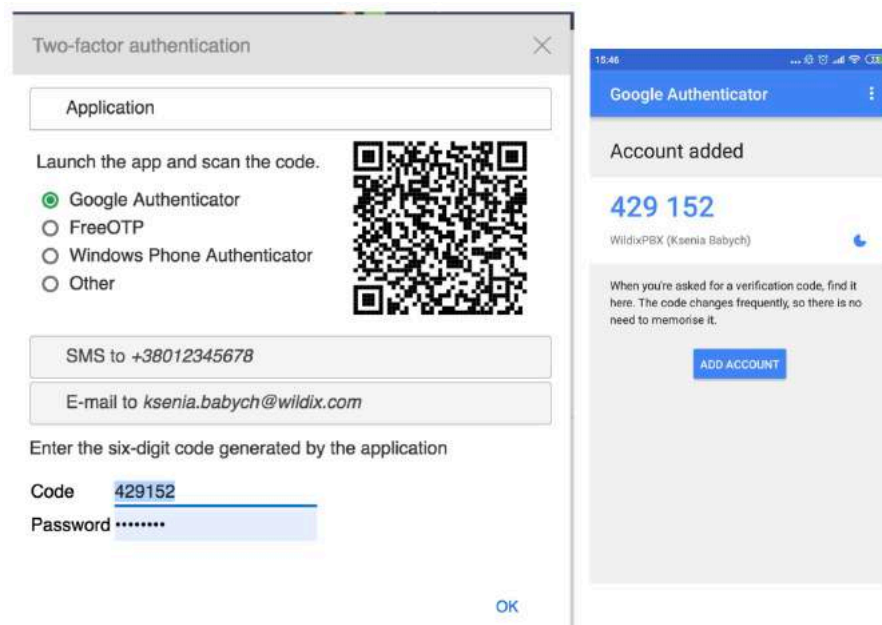
-  Limitations:
- Login with 2FA is not available for Google / Office 365 single sign-on
 - 2FA via SMS/ email is not saved in case user is moved to another PBX in WMS Network

Via external application

 Time zones of your smartphone and PBX must be synced in order to generate correct one-time password.

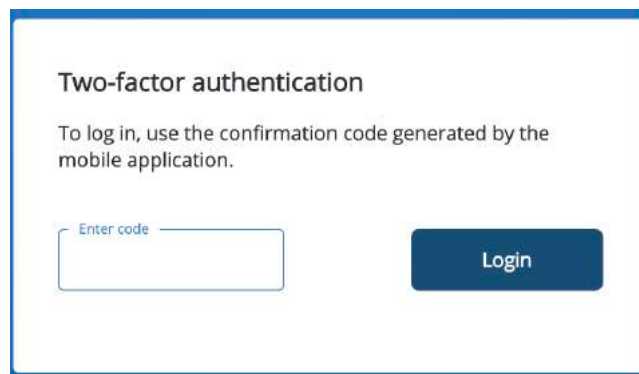
Steps to enable 2FA:

- Download an external application to your smartphone that generates one-time passwords
- Click on the **Pencil** icon In Collaboration *Settings* -> *Personal*, near “Two factor authentication”
- Open the external application and scan the barcode using your smartphone
- Enter the 6-digit code generated by the application into Collaboration and your password for access to Collaboration:



- 5. Click **OK**

The next time you login, you are required to enter a code generated by this application after you provide your login and password for access to Collaboration:



Open the application on your smartphone, generate a code and enter it on Collaboration side to complete the login.

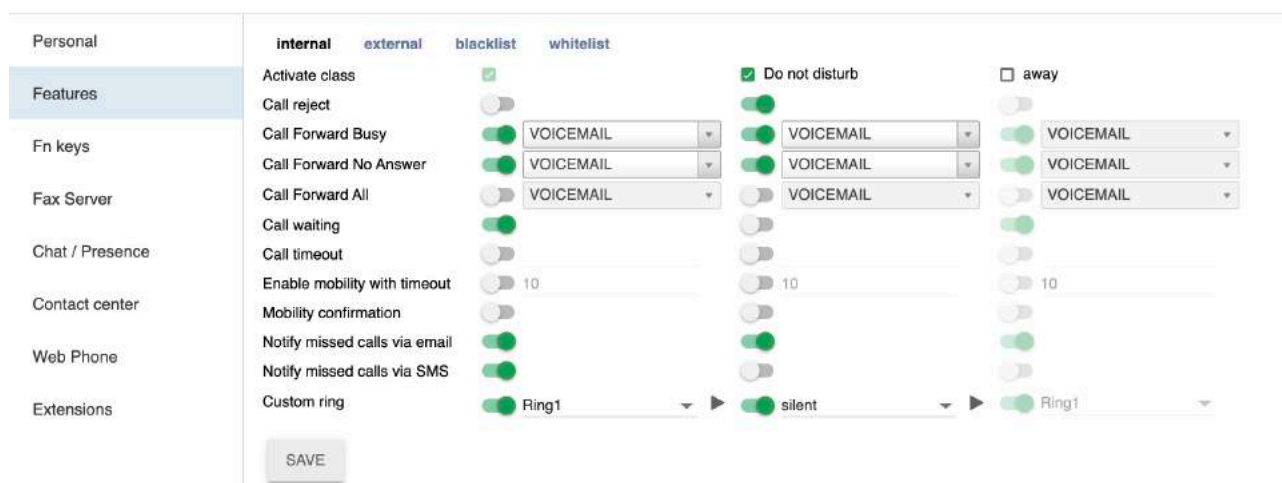
 **Note:** in case you can't use your device (your smartphone), refer to your PBX admin to disable 2FA and create a new password for access to Collaboration.

Video tutorial: <https://wildix.wistia.com/medias/6l7wn2a8cc>

Call features

Call features can be set up based on user status and on call class.

Go to *Collaboration Settings -> Features*:



The upper menu (internal / external / blacklist / whitelist) allows you to set up call features for different call types.

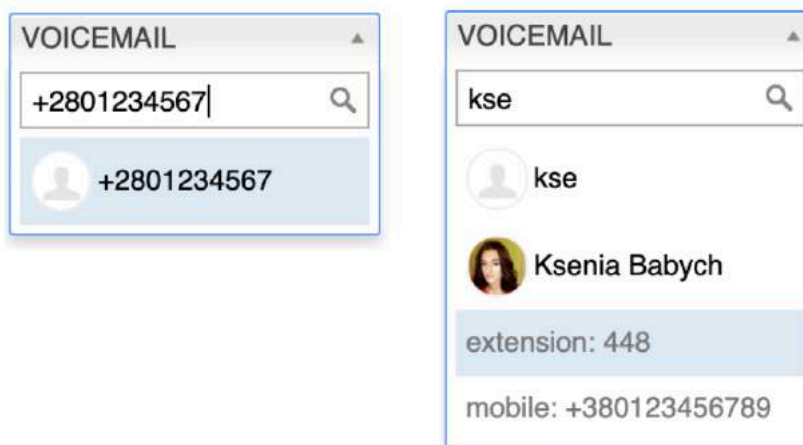
In this way it is possible to set up different behavior based on the type of call. It is possible to define type of call:

- based on type of contact: In Collaboration -> *Phonebook* -> *Type of contact* (when you create a new contact or edit the existing one)
- based on type of call, set up on WMS side (Dialplan)

For each call type it is possible to set up call features based on user status (Available / Do not disturb / Away).

- *Activate class*: activated by default for *internal* call type and *Available* user status
- *Call reject*: if enabled, you do not receive incoming calls
- *Call Forward Busy*: enable the option and enter the number into the field or select VOICEMAIL to enable call forwarding when busy on the phone

 Note: you can start entering a contact name into the field to view all the contacts matching your search; click on one of the phone numbers displayed below the contact.



- *Call Forward No Answer*: enable the option and enter the number into the field or select VOICEMAIL to enable call forwarding in case of no answer
- *Call Forward All*: enable the option and enter the number into the field or select VOICEMAIL to enable the forwarding of all the incoming calls
- *Call waiting*: if enabled, you receive more than one call at a time
- *Call timeout*: if enabled, the incoming call is terminated in case there is no answer within a specified timeout
- *Enable mobility with timeout*: if enabled, you receive incoming calls also to your Mobility extension number (mobile number) after the specified timeout; mobile number must be configured in *Collaboration Settings* -> [Personal](#)
- *Mobility confirmation*: if enabled, the user is notified on who the caller is when he receives the call on mobility extension number
- *Missed calls notification via email / via SMS*: enable to receive missed calls notifications
- *Custom ring*: select the ringtone for WP4X0, WorkForce, WelcomeConsole and Collaboration

Video tutorials

Call forwarding rules: <https://wildix.wistia.com/medias/jzr33s5c78>

Mobility extension: <https://wildix.wistia.com/medias/3sgkb51t6i>

Function keys

Function keys configured in this tab allow you to monitor colleagues and features from WP4X0, WorkForce, WelcomeConsole, Vision, SuperVision, iOS/Android apps and Collaboration -> *Function Keys* tab.

To add Function (BLF) keys:

- Select the **Fn key** from the list and click +



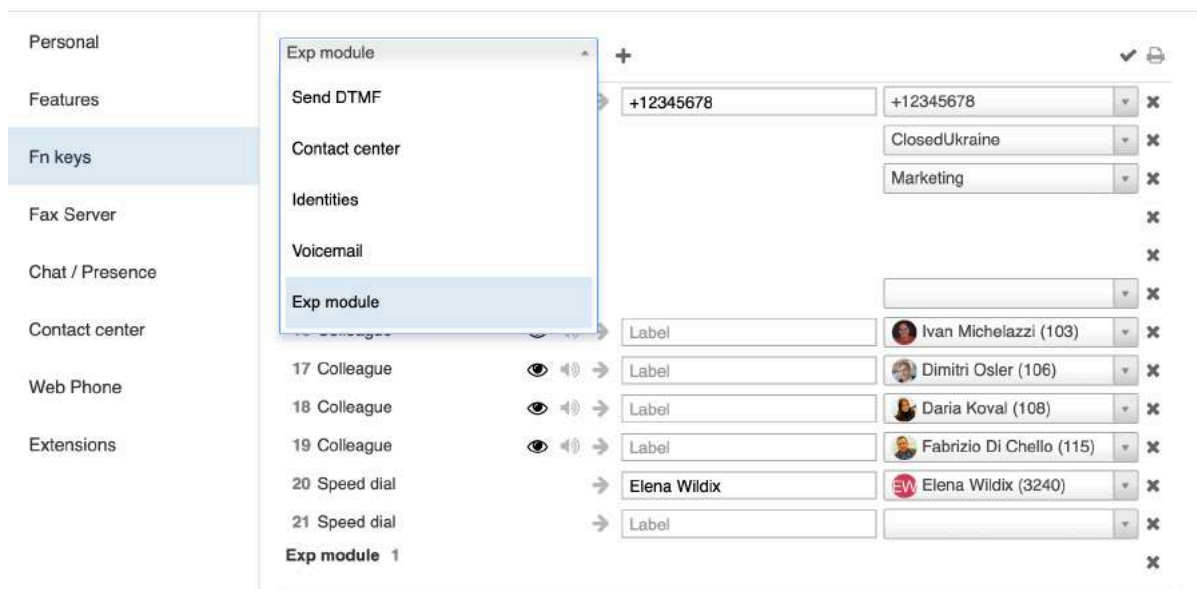
Change the order of BLF keys:

- Use Drag&Drop

To add key expansion modules (supported by WelcomeConsole):

1. Select **Exp module** from the list
2. Click +
3. Move those BLF keys that you would like to monitor from the Expansion module to the corresponding section of the table (Exp. module 1)

4. In the same way you can add more expansion modules



The following additional options in Collaboration -> *Fn keys* and on WP4X0, WorkForce and WelcomeConsole are available for BLF keys *Colleague*, *Call group*, *Speed Dial*, *Park Location*:

- View calls (*eye icon*): when enabled, there is a visual notification with caller information, you can press BLF to pick up
- Audio notification (*speaker icon*): when enabled, a beep is played when there is an incoming call
- Direct transfer (*arrow icon*): when enabled, pressing the BLF key during a call performs a blind transfer

6 Call group



Setting up BLF keys - Video tutorial <https://wildix.wistia.com/medias/5k44lv9uwf>

Call Transfer via Fn keys - Video tutorial <https://wildix.wistia.com/medias/dvvo4eoyk6>

List of function keys:

Colleague

- Monitor user status
- Press to call
- Press to pick up a ringing call

Park Location

- Press to park an active call
- Press again to resume

Line

- Shows the actual status of the line

- Press to use the line
- Press to answer a call or to resume a call from hold
- Press to make a call with user's identity extension. Supported on WP4X0, WorkForce, WelcomeConsole. Consult [Identities Feature](#) for detailed information

Speed Dial

- Press to call

 Note: you can use any shortcut based on Feature codes with Speed Dial function key, example: enter the value "cgmanager*2*[call_group_ID]" into the field for dynamic call group login / logout.

Read [Feature Codes](#) notes for more information.

Trunk

- Monitor the status of channels on a trunk (in case there are no available channels, BLF is on)
- Press to use this trunk

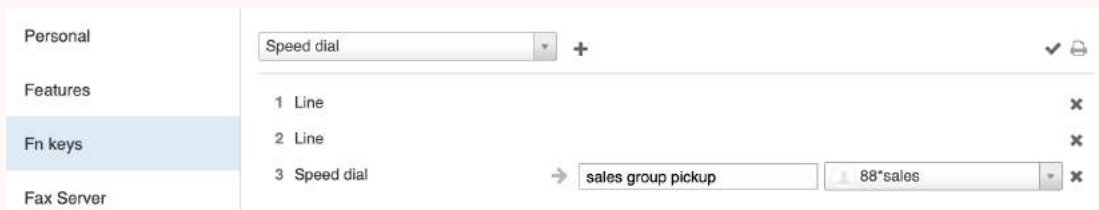
Timetable / Switch / 3 state switch

- Monitor the status of a timetable / switch
- Press to change the status

Group pick up

- Press to pick up a ringing call of a user from your ACL group (feature works for users registered to the same PBX)

 In case you are using Call groups or Pickup groups feature (this feature can be enabled only by the system administrator in WMS; feature is enabled when at least one value is present in "Call groups"/ "Pickup groups" field in WMS -> **Users** -> **Edit preferences** -> **Settings**): BLF "Group pick up" does not work. Instead of the BLF, you can use the BLF "Speed dial" and indicate 88*<call_group_name>:



The screenshot shows the 'Fn keys' configuration page. On the left, there is a sidebar with 'Personal', 'Features', 'Fn keys' (selected), and 'Fax Server'. The main area shows a 'Speed dial' dropdown menu with a '+' icon. Below it, there are three lines of configuration:

Line	Configuration	Action
1 Line		✕
2 Line		✕
3 Speed dial	→ sales group pickup 88*sales	✕

In this scenario, 88 is Pickup Feature Code, while <call_group_name> is the value (call group name, e.g. "sales"), specified in the field "Call group" in the preferences of one or more users in WMS, and the same value ("sales") must be specified in the field "Pickup groups" in WMS, in the preferences of the user who picks up the call of this Call group.

Call group

- Monitor if there is an incoming call to a call group
- Press to dial a call group or to pick up a ringing call (when blinking) of a call group
- Perform a blind transfer to a call group via drag&drop

 Note: Make sure that *Direct transfer* option (arrow icon) is enabled.

Send DTMF

- Press to send DTMF

Contact Center

- Press to log into Call groups as a dynamic user on hardware phones. Supported on WP4X0, WorkForce, WelcomeConsole. Consult [BLF "Contact center"](#) for detailed information

Identities

- Press to change the identity of numbers for outgoing calls. Supported on WP4X0, WorkForce, WelcomeConsole. Consult [Identities Feature](#) for detailed information

Voicemail

- Press to access shared voicemail of another user or subscribe for a Call Group notifications manager to view missed calls and voicemails. Consult [Shared voicemail feature](#) and [How to set up the Call Group notifications manager feature](#) for detailed information

Fax Server

Fax cover settings:

- Company logo: choose the file on your PC
- Company: company name
- Fax machine id: ID of the local fax machine (default value: Fax Server)
- Fax header: fax header to identify the fax source (default value: Wildix PBX)

Chat/ Presence

- Notify unread messages via email: enable / disable email notifications about new chat messages (disabled by default)
- Show notifications in DND status: enable / disable chat / call popup notifications in DND status
- Auto away status: if enabled, your status automatically switches to “away” after minutes of inactivity on local PC, specified in the field next to the checkbox
- Custom statuses: you can add custom Available / Away / DND user statuses with predefined duration period and status message; custom statuses added in this menu appear then for selection in the menu of user status setting. To add a custom Available / Away / DND status, proceed as follows:
 - Click on “available”: you can select to add a custom duration period for “available”, “away” or for “DND”
 - Add a status message that will be visible for other users (optional)

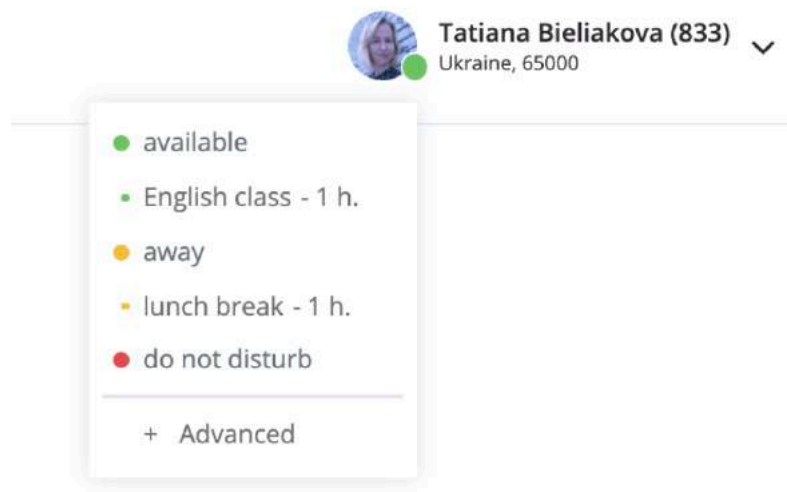


Status	Message	Duration	Toggle	Delete
available		1 h. 00 min.	☒	+
available	English class	1 h. 0 min.	☒	✕
away	lunch break	1 h. 0 min.	☒	✕

- Select the duration period for this status (if you don't need duration, disable the switch next to the time duration)

 Note: When the duration of the custom Away or DND status ends, the user is automatically switched to Available. In case of custom Available status, when its duration ends, the user remains Available.

- Click on the **+** icon to add a new custom status
- Click **Save**
- Click on your user status: now this custom status is available for quick selection under the relevant status - *Available*, *Away*, or *DND Away*:



Video tutorial: <https://wildix.wistia.com/medias/h03vgatg05>

Contact center

Users can dynamically log into Call groups from *Collaboration Settings* -> *Contact center*.

For more information, refer to [Call distribution in Call groups](#) instruction, [Contact center](#) chapter.

Web Phone

 Supported only in Chrome and Firefox browsers.

Select active device for calls via web:

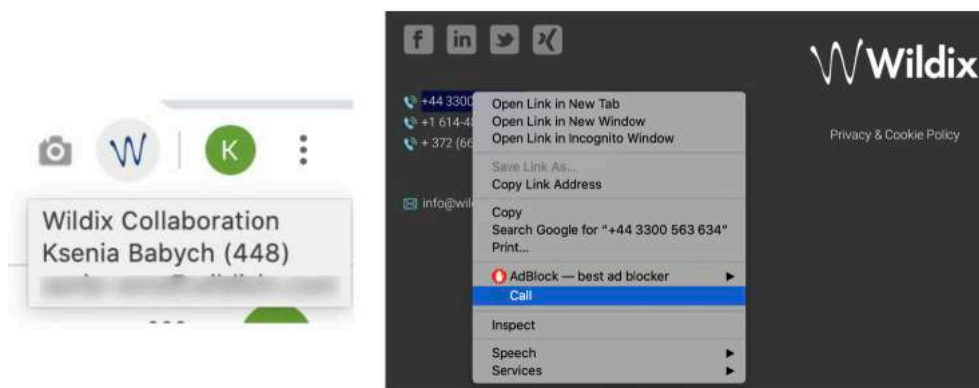
- Speakers: select audio device for speakers (not supported in Firefox)
- Ringing: select audio device for ringtone playback (not supported in Firefox)
- Microphone: select audio device for microphone
- Video: select video camera for video calls
- DSCP QoS (off by default): enable/ disable DSCP QoS parameter which depends on the value selected in *WMS Settings* -> *PBX* -> *SIP-RTP*
- Auto adjust mic: check the box for auto adjustment of microphone level
- Autostart: uncheck the box if you wish to disable Web phone from the list of active devices (in case you have other devices registered to your account)

- Echo test: click the button to perform an echo test

Extensions

Extensions and plugins that can be downloaded and installed on PC:

- Browser Extension (Chrome browser only): adds a shortcut for quick access to Collaboration from Chrome toolbar (click W icon to show the browser tab where Collaboration is running / to open Collaboration in the web browser in case it's not running) and click2call (right-click on a phone number or a link on a web page and select Call)



It is also possible to use the **W** icon to open Collaboration as a standalone application; download the Chrome extension: <https://chrome.google.com/webstore/detail/wildix-collaboration/lobgohpoobpijgfehlhdppegdbomkn>

How to manually install Collaboration Chrome Extension

- TAPI driver (Windows only): component for making and receiving calls via Microsoft Outlook and TAPI enabled applications
Read the guide: [Wildix TAPI driver](#)
- Integration service (WIService): this component is required by CDR-View, Popup App, includes headset integration, screen sharing, as well as adds support for additional features (separate documentation about [WIService](#)):
 - Headset integration (merged into WIService starting from v 3.2.2 on Windows and from v 3.2.17 on macOS): adds support for remote call answer/ hangup and volume control from headset via USB connector on Mac OS X / Windows.
 - Fax Printer (merged into WIService starting from v. 3.7.1): this component allows sending faxes from Windows / Mac OS X applications
Read the guide: [Fax Printer for Microsoft Windows / Mac OS X](#)

Also adds support for Kuando Busylight (<https://www.wildix.com/portfolios/kuando-busylight/>)

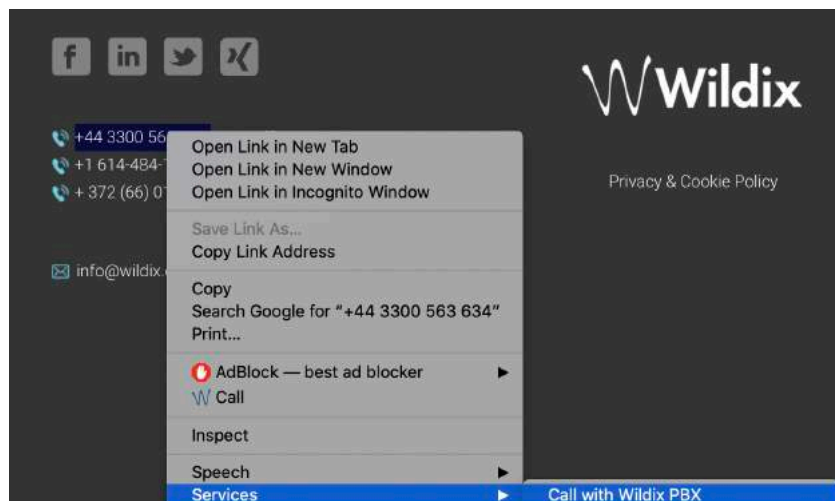
**Important:**

- Headset integration is not compatible with SfB (skype for business).
- If you are using a Wildix compatible third-party headset (Jabra, Plantronics, Sennheiser), uninstall the software provided by the third-party vendor and use Wildix Integration service.

- Screen sharing component (merged into WIService starting from v 3.4.1 on Windows and macOS): lets you share your screen and provide remote access to your desktop.

See chapter: [Screen Sharing and remote control](#)

- Mac OS X:
 - call generation by clicking on a web page link containing a phone number (support of “sip:”, “wildix:” URI)
 - call generation by right-clicking on a phone number and selecting Services -> **Call with Wildix PBX:**



- Windows:
 - URI support; call via shortcut (Dialing hot key, configured in Collaboration *Settings* -> [Personal](#)). Note: *WIService for Windows requires .NET Framework v.4.0*
 - Outlook Integration (merged into WIService starting from WIService v. 3.5.1): adds support for Calendar Sync, Presence, click2call, IM, call popup from Outlook
Check this guide for more info: [Outlook integration for Microsoft Windows](#)

**Note: Native MacOS contacts lookup.**

Integration with native MacOS contacts is enabled automatically starting from WIService version 2.9.9 and higher. Make sure that permissions for WIService is activated in *macOS Security & Privacy* -> *Contacts*.

How to use:

- Enter MacOS contact's name or number into Search field of Collaboration
- Select any option (Call, SMS, Show contact etc) from the drop-down list

Phonebook

Import of PBX shared phonebooks is set up on WMS side.

Via Collaboration it is impossible to:

- Edit contacts of Colleagues phonebook
- Add/ delete/ edit names of PBX shared phonebooks

Via Collaboration it is possible:

- Add/ edit/ delete contacts of PBX shared phonebooks
- Create and manage personal phonebooks

Once a new contact is added to a PBX shared phonebook via Collaboration, it becomes visible by other PBX users.

Create/ edit a contact



Note: only users with certain permissions can modify public phonebooks; to enable the option, the PBX admin must add [ACL ability](#) "Can" - "Modify public phonebook".

Go to *Collaboration* -> *Phonebook*:

1. Click **+** in the upper left section
2. Fill in the fields:
 - Name: contact's full name
 - Phonebook: select the phonebook to which the contact must belong (it is impossible to add contacts to *Colleagues* phonebook); it is also possible to select the phonebook in the upper left section of the screen
 - Contact owner: the contact is automatically assigned to a user who creates it (it can be reassigned to another owner). It helps to route calls to assigned owners. More information: [How to automatically route calls to contact owners](#)

Other important fields (optional):

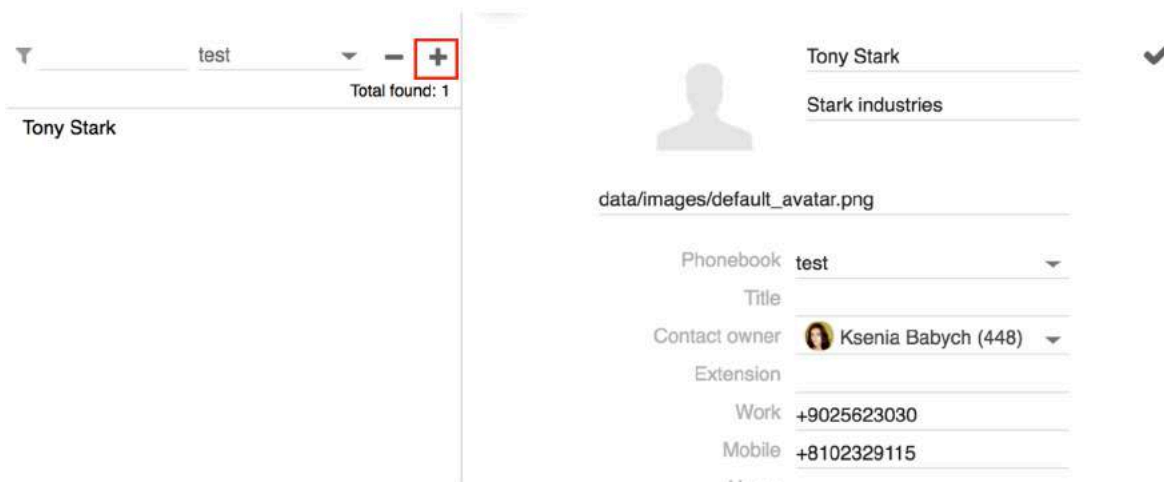
- Organization: company name
- data/images/default_avatar.png image URL: you can upload the contact image on your server and indicate the path to the image in this field (image must be square, otherwise it appears distorted). The contact image is displayed during incoming calls in Collaboration, on WP4X0, WorkForce and WelcomeConsole
Format requirements:
 - PNG only
 - image size up to 16 kB
- Extension: this field is normally used for Colleagues
- Work / Mobile / Home / Home Mobile / Main: phone numbers of contact by priority
- Short number: if this field is filled in, it is possible to call this contact via Feature Code 80 Speed dial (Feature codes are defined in *WMS* -> *Dialplan* -> *Feature codes*)

Example: dial 80*3241, where "80" is "Speed dial" Feature code, "3241" is "Short number" defined for the contact
- Type of contact (internal / external / whitelist / blacklist): in case contact type is defined, the rules of call features selected in *Collaboration Settings* -> [Features](#) is applied for calls from this contact (it is also possible to define rules for call routing based on call type in *WMS* -> *Dialplan*)

- Custom ring: it is possible to select a custom ringtone for the contact
- Notes: notes entered here are visible and can be edited by other PBX users

! Important: these notes can be consulted only from Phonebook; for contact notes that can be displayed and added to contact during a call, see chapter: [Contact notes](#).

3. Click on the **Tick** icon (Save):



The screenshot shows the Wildix Phonebook interface. On the left, a search bar contains the text 'test' and a dropdown arrow. Below it, a list shows 'Tony Stark' with 'Total found: 1'. On the right, a contact form for 'Tony Stark' is displayed. The form includes fields for 'Name' (Tony Stark), 'Organization' (Stark industries), 'Avatar' (data/images/default_avatar.png), 'Phonebook' (test), 'Title', 'Contact owner' (Ksenia Babych (448)), 'Extension', 'Work' (+9025623030), and 'Mobile' (+8102329115). A green checkmark icon is visible in the top right corner of the form.

Add/ edit contact during a call:

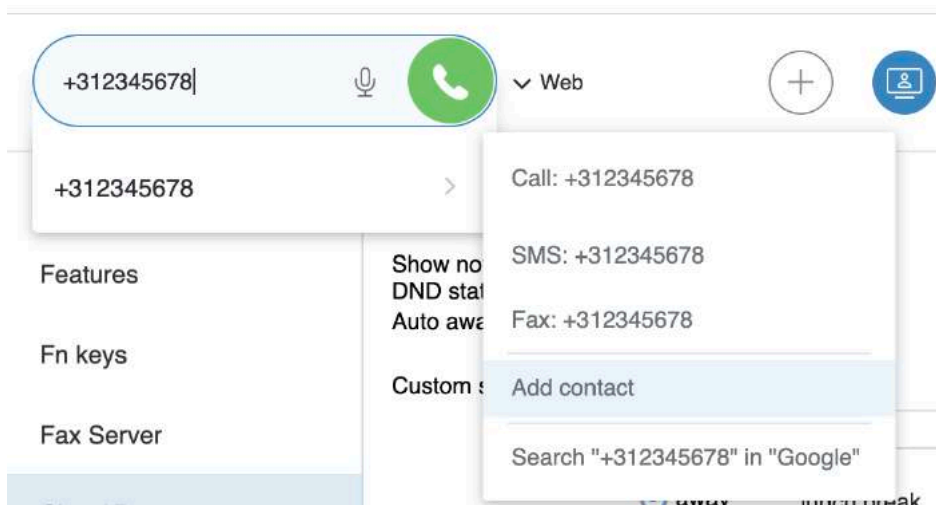
- Click on the Contact name/ number during a call to edit the contact (if it exists) or create a new one:



The screenshot shows the Wildix Phonebook interface with a call control overlay. On the left, a contact form for 'Tony Stark' is displayed. The form includes fields for 'Name' (Tony Stark), 'Organization' (Stark industries), 'Avatar' (data/images/default_avatar.png), 'Phonebook' (test), 'Title', 'Contact owner' (Ksenia Babych (448)), 'Extension', 'Work' (+9025623030), 'Mobile' (+8102329115), 'Home', and 'Home mobile' (+3891245678). On the right, a call control overlay is visible, showing a red phone icon, a green checkmark, and a red box containing the number '+3891245678'.

Add a new contact before making a call:

1. Enter a number into the search field
2. Select **Add contact** from the drop down menu
3. Add a new contact



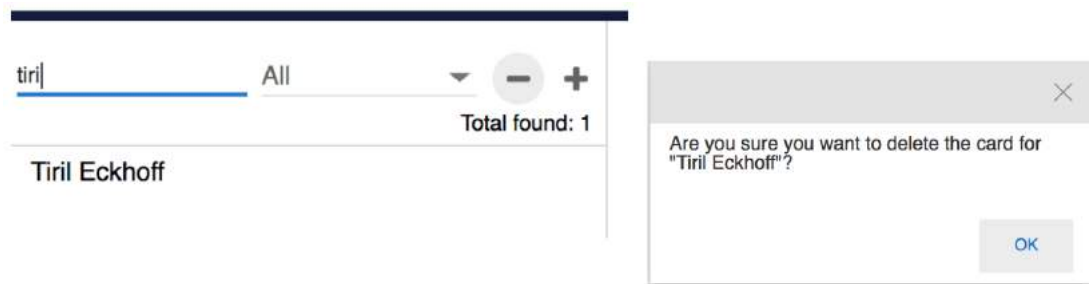
Add a new contact after a call:

1. Go to *Collaboration* -> *History*
2. Right click on the number and select **Add contact**
3. Add a new contact

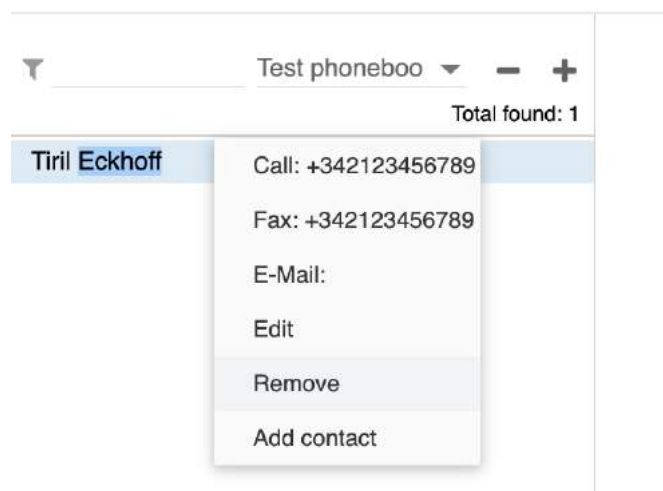
	All	16/06/2020	CDR-VIEW	Date	Tags	Duration
000312345678				Today 18:23		0:00
Emil Hegle Sv	Call			Today 17:31		1:34
Emil Hegle Sv	Call the mobile			Today 16:56		0:00
Emil Hegle Sv	Send fax			Today 16:54		0:00
Emil Hegle Sv	Send SMS			Today 16:53		0:00
+34212345678	SMS via Classound			Today 15:32		0:00
Emil Hegle Sv	Tags			Today 13:41		0:32
Ole Einar Bjørn	Add contact			Today 11:43	support	0:00
Emil Hegle Sv	Archive			Mon 15/06/2020 18:15		0:01
Emil Hegle Sv				Mon 15/06/2020 17:58		0:00
Emil Hegle Sv				Mon 15/06/2020 17:54		0:01
Emil Hegle Sverinsen (300)				Fri 12/06/2020 12:42		0:36

Delete a contact:

1. Go to *Collaboration* -> *Phonebook*
2. Find the contact using Search
3. Click - in the upper left section to delete the contact and click **OK** to confirm (otherwise click **x** to close the window)



Otherwise right-click on a contact and select **Remove**:



Edit a contact:

1. Go to *Collaboration -> Phonebook*
2. Find the contact using Search
3. Click the **Pencil** icon (Edit) to edit the contact
4. Edit the fields
5. Click the **Tick** icon (Save) to save the changes:

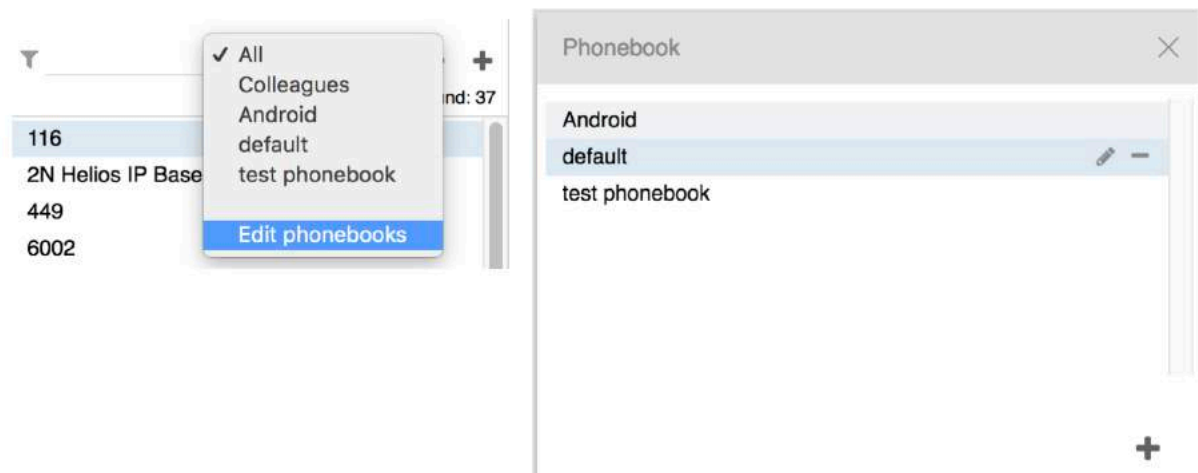


Personal phonebook

 Personal phonebooks are used only for outgoing calls and not designed for CID lookup during incoming calls.

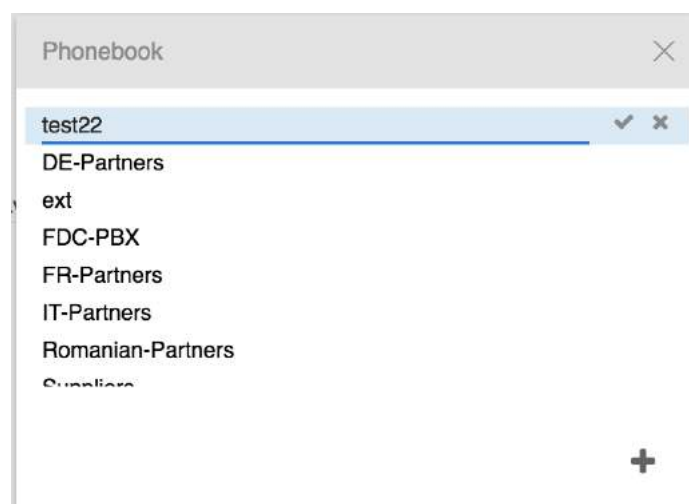
To create a personal phonebook:

1. Go to *Collaboration* -> *Phonebook*
2. Click on **All** in the upper left section, then click on **Edit phonebooks**:



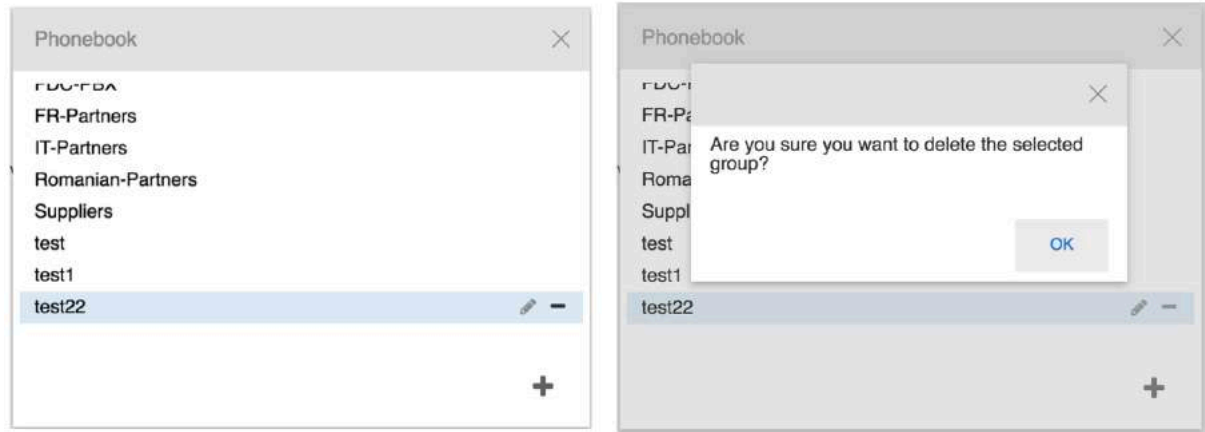
Add a personal phonebook:

1. Click +
2. Enter the name of the phonebook and click on the **Tick** icon to confirm
3. Now you can proceed with adding contacts



Delete a personal phonebook:

1. Select a phonebook
2. Click -
3. Click **OK** to confirm (otherwise click **x** to close the window):



Edit the name of the personal phonebook:

1. Select a phonebook
2. Click on the **Pencil** icon
3. Enter the new name
4. Click on the **Tick** icon to confirm

Contact notes

There are two types of notes that can be added to contacts:

- Notes that can be added and consulted in Phonebook contact information and can be imported during import of phonebooks (see chapter: [Create/ edit a contact](#))
- Contact notes that can be added and consulted during a call (read further)



Note: contact notes must be enabled on WMS side (*Settings -> PBX -> Call and chat history -> "Enable contact notes"*).

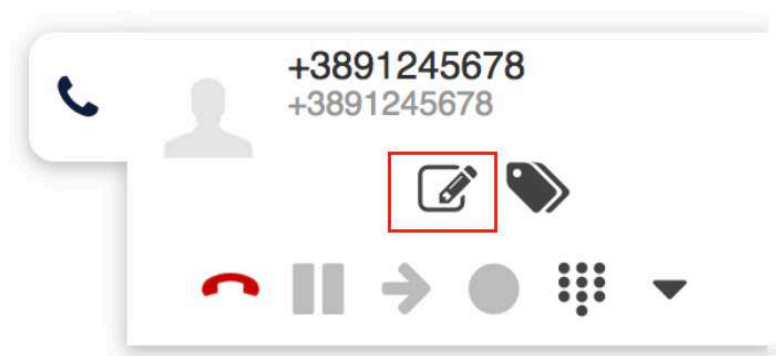


Note: notes cannot be added for colleagues.

Add / display notes added to contact

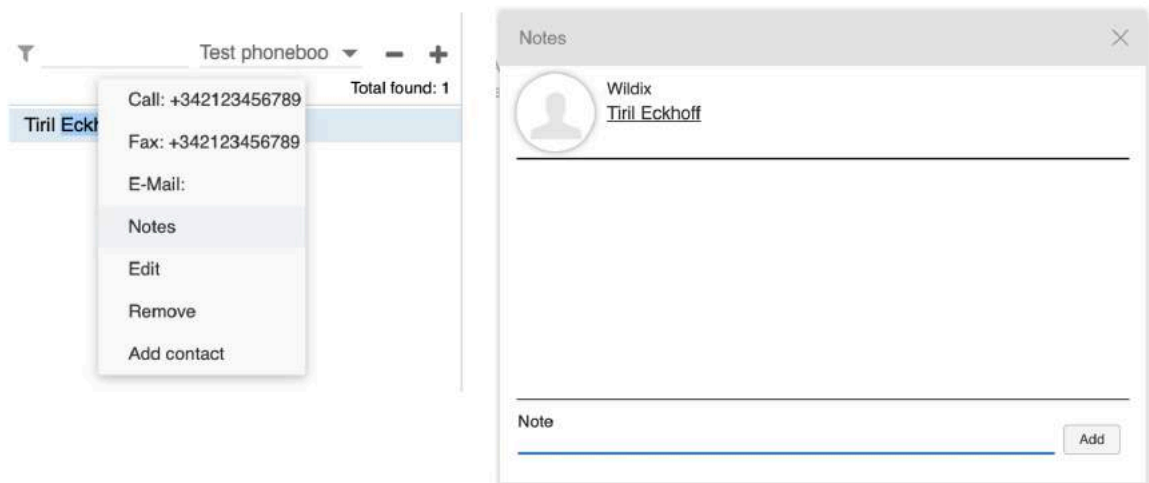
During a call:

- Click the **Notes** icon



From Phonebook:

- Right-click on a contact from the left section of the screen and select **Notes**
- Write notes and click **Add**



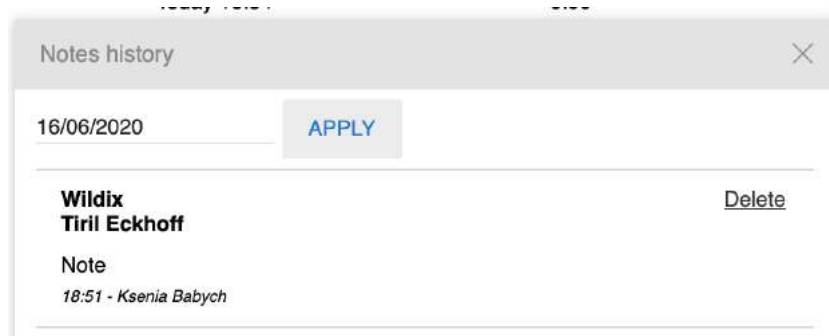
Delete option is available only for notes added by you.

View history of notes added by users of the system:

- Go to *Collaboration -> History* and click **Notes** in the upper section of the screen

View only the notes added before a certain date:

1. Click on the date
2. Select a certain date
3. Click **Apply**:



Calls / faxes history

Pre-requisites to store and access CDR (Call detail record):

- CDR backend must be configured and selected on WMS side
- Partition for storing CDR must be defined on WMS side on storage device

History of calls and missed calls notifications is synced over WMS on all Wildix devices: Collaboration, WP4X0, WorkForce, WelcomeConsole, Vision, SuperVision, Android / iOS client, except for W-AIR handsets (W-AIR handsets display only local call history).

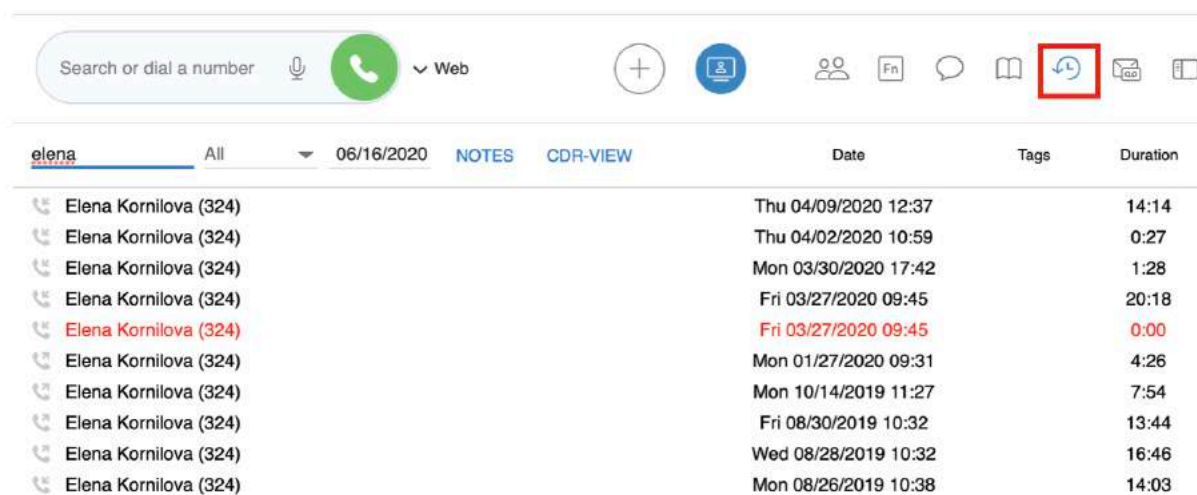
To view history of call, go to *Collaboration* -> *History*.

By default incoming / outgoing / missed calls are displayed.

Failed events are displayed with red color.

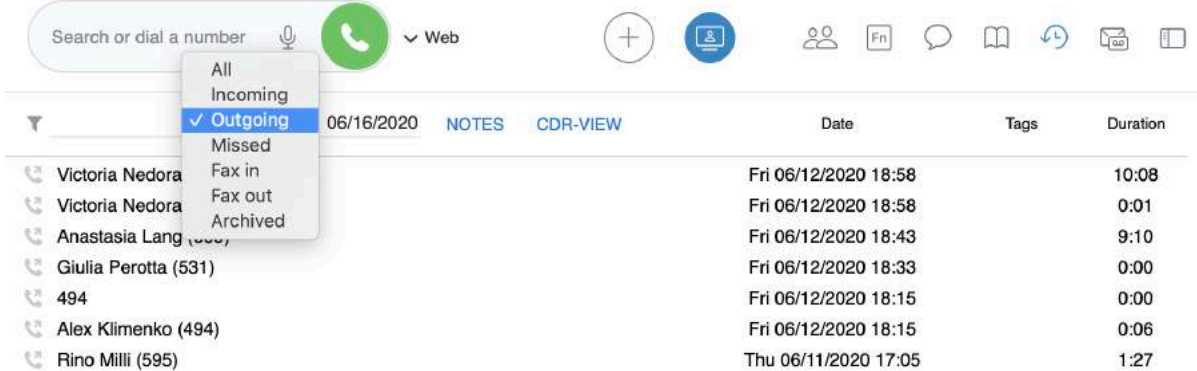
Events filtering:

- Filter the events by contact name / number:



	Date	Tags	Duration
Elena Kornilova (324)	Thu 04/09/2020 12:37		14:14
Elena Kornilova (324)	Thu 04/02/2020 10:59		0:27
Elena Kornilova (324)	Mon 03/30/2020 17:42		1:28
Elena Kornilova (324)	Fri 03/27/2020 09:45		20:18
Elena Kornilova (324)	Fri 03/27/2020 09:45		0:00
Elena Kornilova (324)	Mon 01/27/2020 09:31		4:26
Elena Kornilova (324)	Mon 10/14/2019 11:27		7:54
Elena Kornilova (324)	Fri 08/30/2019 10:32		13:44
Elena Kornilova (324)	Wed 08/28/2019 10:32		16:46
Elena Kornilova (324)	Mon 08/26/2019 10:38		14:03

- Filter by incoming / outgoing / missed calls / fax in / fax out / archived events:

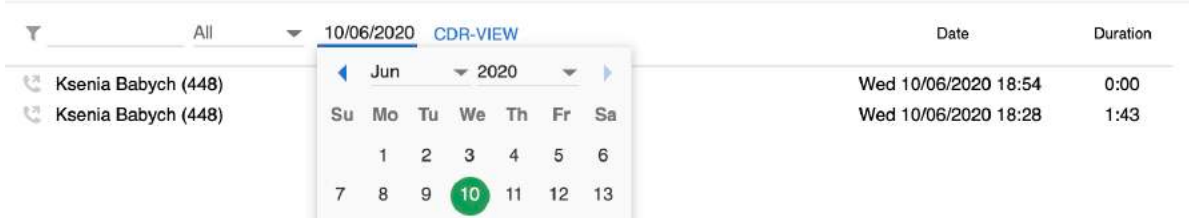


Search or dial a number  Web        

Filter: **Outgoing** (selected), Incoming, Missed, Fax in, Fax out, Archived

	06/16/2020	NOTES	CDR-VIEW	Date	Tags	Duration
Victoria Nedora				Fri 06/12/2020 18:58		10:08
Victoria Nedora				Fri 06/12/2020 18:58		0:01
Anastasia Lang (531)				Fri 06/12/2020 18:43		9:10
Giulia Perotta (531)				Fri 06/12/2020 18:33		0:00
494				Fri 06/12/2020 18:15		0:00
Alex Klimenko (494)				Fri 06/12/2020 18:15		0:06
Rino Milli (595)				Thu 06/11/2020 17:05		1:27

- Filter by date (only the events that took place up to the date selected are displayed):



Filter: All, 10/06/2020, CDR-VIEW

Calendar: Jun 2020

	10/06/2020	CDR-VIEW	Date	Duration
Ksenia Babych (448)			Wed 10/06/2020 18:54	0:00
Ksenia Babych (448)			Wed 10/06/2020 18:28	1:43

For detailed analysis of call activity of users and groups, click **CDR-View** (read the guide [CDR-View – User Guide](#)).

Delete / archive events

To archive an event:

- Right-click on an entry and select **Archive**



Filter: All, 16/06/2020, CDR-VIEW

	16/06/2020	CDR-VIEW	Date	Duration
Ksenia Babych (448)			Today 13:41	0:32
Ksenia Baby	Call		Mon 15/06/2020 18:15	0:01
Ksenia Baby	Call the mobile		Mon 15/06/2020 17:58	0:00
Ksenia Baby			Mon 15/06/2020 17:56	0:46
Ksenia Baby	Send fax		Mon 15/06/2020 17:54	0:01
Tarjei Bø (50)	Send SMS		Mon 15/06/2020 17:54	0:00
Tarjei Bø (50)	SMS via Classound		Mon 15/06/2020 16:57	4:04
Ksenia Baby	Send e-mail		Fri 12/06/2020 12:44	1:04
Ksenia Baby			Fri 12/06/2020 12:42	0:36
Ole Einar Bjør	Chat		Fri 12/06/2020 12:29	0:00
Ksenia Baby	Show contact		Thu 11/06/2020 11:32	0:14
Ksenia Baby	Archive		Thu 11/06/2020 11:31	1:29

To recover an archived event:

- Filter events by **Archived**
- Right-click on an entry
- Select **Recover**

Archived	16/06/2020	CDR-VIEW	Date	Duration
Ksenia Babych (448)				
			Today 13:41	0:32
Call Call the mobile Send fax Send SMS SMS via Glassound Send e-mail Chat Show contact Recover				

To delete an event:

 Note: only users with certain permissions can delete events; to enable the option, the PBX admin must add [ACL ability](#) "Can" - "Delete calls".

1. Right-click on an entry
2. Select **Delete**
3. Click **Delete** to confirm

 Note: deleted events cannot be recovered.

Download faxes and call recordings

Faxes / fax reports can be downloaded by clicking on PDF icon:

Fax out	01/05/2019	NOTES	CDR-VIEW	Date	Tags	Duration
+4742355343						
				Today 12:38		0:00

Call recordings can be downloaded by clicking on the audio file icon:

Outgoing	16/06/2020	CDR-VIEW	Date	Tags	Duration
Emil Hegle Svendsen (500)					
			Thu 11/06/2020 11:32		0:14

At the moment it is not possible to filter calls containing call recording. In case a call contains a call recording file, the audio file icon is displayed for this entry in *Collaboration -> History*.

Setting tags

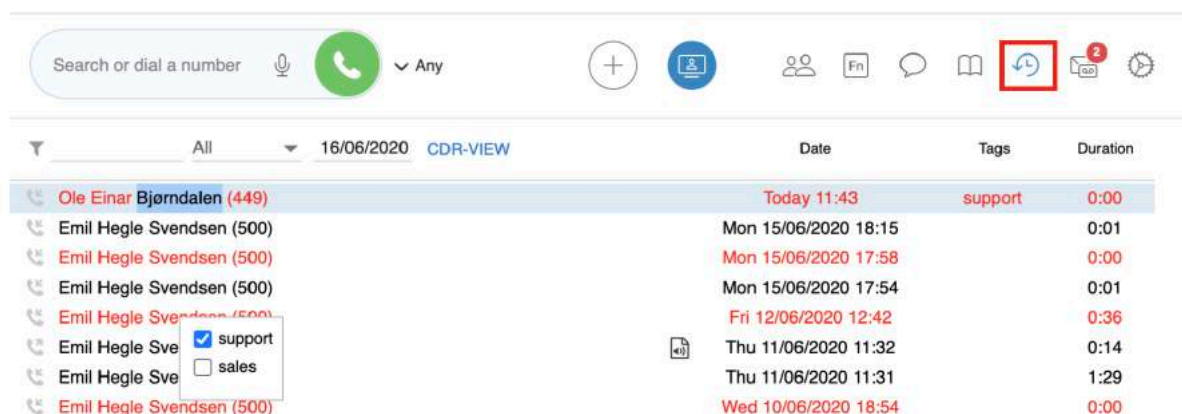
Tags are implemented for filtering of calls by tag in CDR-View.

Tags must be added on WMS side (WMS Settings -> PBX -> Call and chat history, "Tags").

It is possible to set tags via WMS -> Dialplan -> "Set"-> "Tags" application or via Collaboration. Tags edited via Collaboration rewrite tags added via Dialplan.

Set/ edit tags for past calls

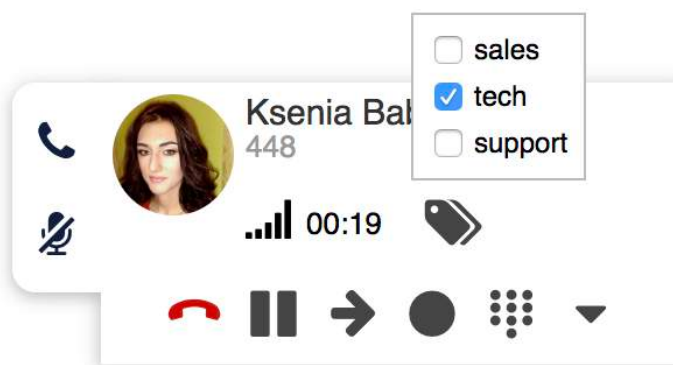
1. Go to *Collaboration* -> *History*
2. Right-click on an entry
3. Select **Tags**
4. Tick off the tags that you wish to set for this entry:



	Date	Tags	Duration
Ole Einar Bjørndalen (449)	Today 11:43	support	0:00
Emil Hegle Svendsen (500)	Mon 15/06/2020 18:15		0:01
Emil Hegle Svendsen (500)	Mon 15/06/2020 17:58		0:00
Emil Hegle Svendsen (500)	Mon 15/06/2020 17:54		0:01
Emil Hegle Svendsen (500)	Fri 12/06/2020 12:42		0:36
Emil Hegle Sve	Thu 11/06/2020 11:32		0:14
Emil Hegle Sve	Thu 11/06/2020 11:31		1:29
Emil Hegle Svendsen (500)	Wed 10/06/2020 18:54		0:00

Set tags during a call

1. Click **Tags** icon
2. Tick off the tags that you wish to set for this call:



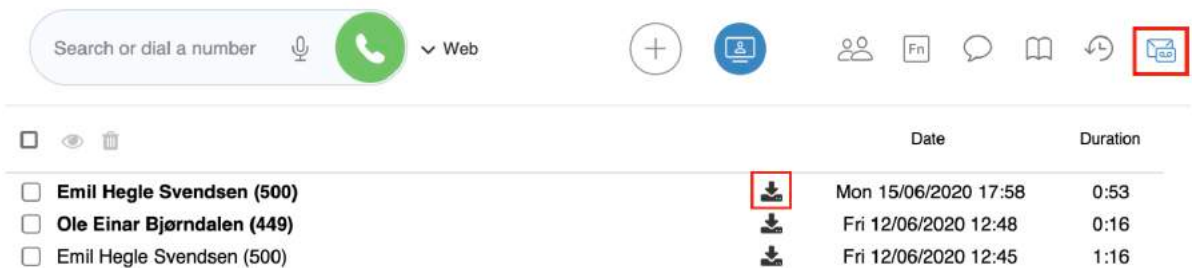
Voicemails

 Note: Detailed information about Voicemail Service: [Voicemail](#).

Select **Voicemail** in the top menu to access the graphical menu allowing you to listen to Voicemails.

Listen to Voicemails

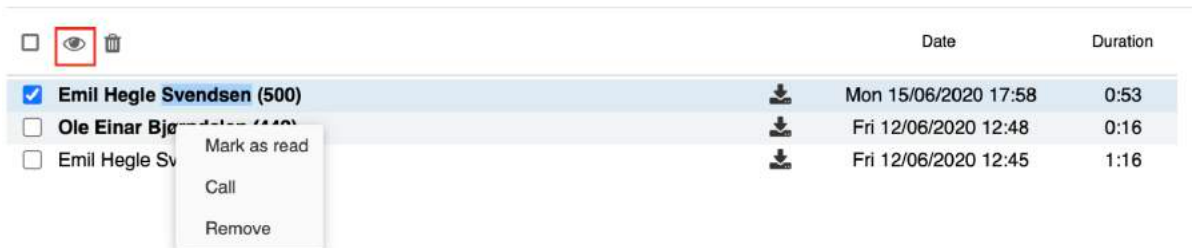
- Click the **Download** icon:



		Date	Duration
☐ Emil Hegle Svendsen (500)		Mon 15/06/2020 17:58	0:53
☐ Ole Einar Bjørndalen (449)		Fri 12/06/2020 12:48	0:16
☐ Emil Hegle Svendsen (500)		Fri 12/06/2020 12:45	1:16

Mark Voicemail as read

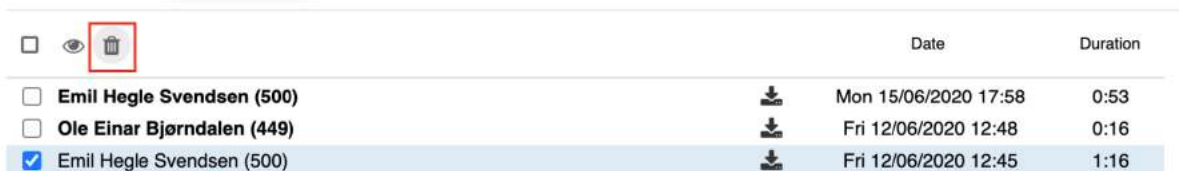
- Select one or multiple Voicemails
- Click **Mark as read** icon in the upper part of the screen or Right-click on selected entry/ entries and click **Mark as read**



		Date	Duration
☒ Emil Hegle Svendsen (500)		Mon 15/06/2020 17:58	0:53
☐ Ole Einar Bjørndalen (449)		Fri 12/06/2020 12:48	0:16
☐ Emil Hegle Svendsen (500)		Fri 12/06/2020 12:45	1:16

Delete Voicemails

- Select one or multiple Voicemails
- Click **Remove** icon in the upper part of the screen or Right-click on selected entry/ entries and click **Remove**:



		Date	Duration
☐ Emil Hegle Svendsen (500)		Mon 15/06/2020 17:58	0:53
☐ Ole Einar Bjørndalen (449)		Fri 12/06/2020 12:48	0:16
☒ Emil Hegle Svendsen (500)		Fri 12/06/2020 12:45	1:16

 Note: you can also listen to your Voicemails by dialing the Voicemail Feature Code (81); it is not currently possible to configure your welcome message from Collaboration: dial the Feature Code and follow the audio instructions (press 0 and then press 1 / 2 / 3 to record your Unavailable / Busy message and your name). Consult [Feature Codes Guide](#) for details.

Logout

To log out :

1. Expand your user status in the top menu
2. Click **Logout**

