

lip 09, 2018 09:27

Collaboration User Guide 3.88 - English

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: 3.88

Updated: May 2018

Permalink: <https://confluence.wildix.com/x/WwDe>

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Prerequisites

Supported OS

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

Note: 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 Win:
 - <https://wildix.com/IntegrationUtility/win/Collaboration-x86.exe>
 - <https://wildix.com/IntegrationUtility/win/Collaboration-x64.exe>
- MSI file for Win:
 - <https://wildix.com/IntegrationUtility/win/Collaboration-x86.msi>
- For MacOS:
 - <https://itunes.apple.com/ua/app/wildix-collaboration/id1324451991>

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

Licenses that must be enabled on PBX

Per-Service PBX:

- Collaboration: access to full features described in the current User Guide
- CDR-View: access to Wildix advanced monitoring and reporting tool (read the guide: [CDR-View User Guide](#))
- Kite-MCU08: possibility to create ubiconf video conferences and be contacted via Kite link (read the guides: [WebRTC Kite Guide](#), [Ubiconf Videoconference Guide](#))

Per-User PBX:

- Read the guide: [Wildix Per-User Licensing](#)

First time login

1. Open the web browser
2. Type into URL the PBX name or IP address (example: <https://mycompany.wildixin.com>)
3. Enter your credentials:
 - Login (extension, user name or email address)
 - Password (WEB password)
4. Click the **Arrow** 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:

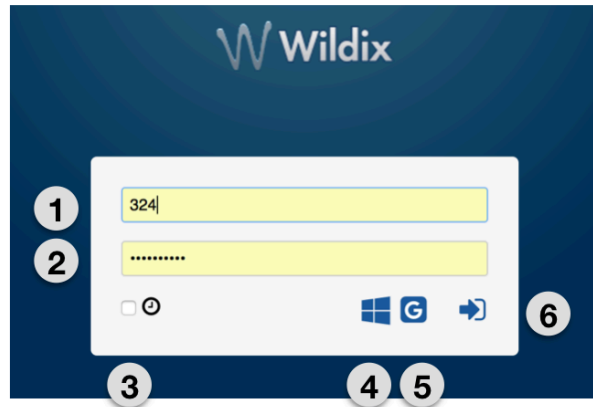
- you use the same email as the one present in your user settings
- this email address is unique in the system

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**.

Login window:



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

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

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

Video tutorial:

<https://www.youtube.com/watch?v=iw6jkhIDzCI&t=>

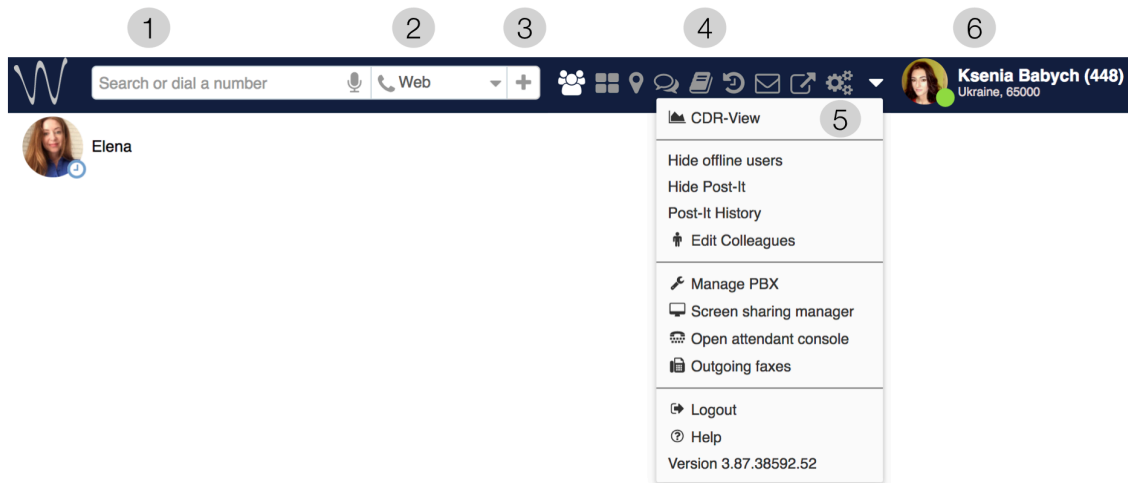
Basic settings

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

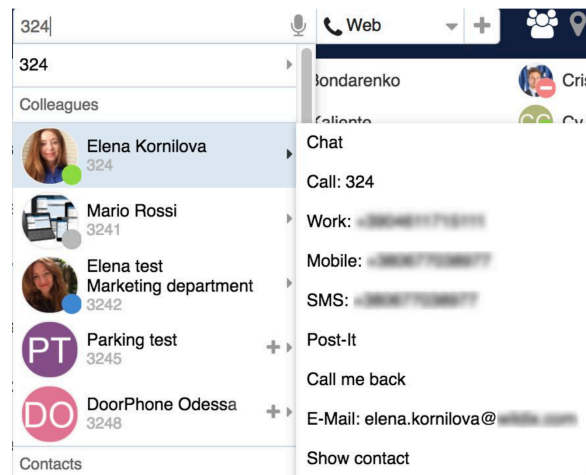
- *E-Mail*: used for email notifications about new Voicemails, missed calls, unread chat messages, call recordings, fax reports etc
- *Mobile*: mobile number for Mobility extension which allows you to make and receive calls via Wildix PBX using your mobile phone
- *Language*: selected language is used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

Quick menu introduction

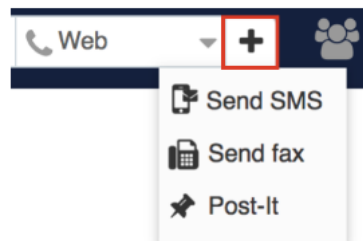
Top menu:



- 1 - Search field with speech recognition: 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 - **More actions:** access to **SMS / Fax / Post-It** dialog window:



- 4 - Other tabs of Collaboration:
 - **Colleagues:** list of colleagues with presence status and geolocation
 - **Function 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*.

- **Map view:** geographical map with location of colleagues
- **Messaging:** 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*.

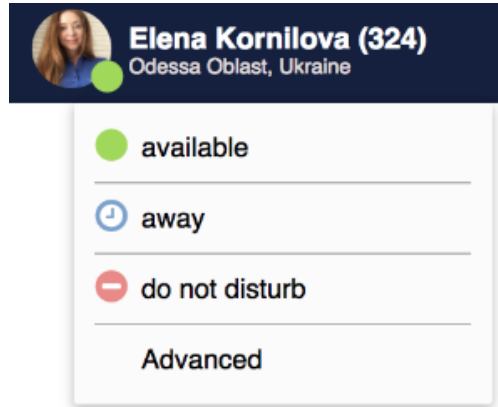
- **Settings:** user settings, call features, feature keys settings and more
- 5 - Other (expanded):
 - **CDR-View** access (if not restricted by license)
 - **Show / hide offline users**
 - **Show / hide Post-It**
 - **Post-It History**
 - **Edit Colleagues**
 - **Manage PBX:** access to WMS (restricted to users of “admin” type)
 - **Screen sharing manager**
 - **Open Attendant Console** (if not restricted by license)
 - **Outgoing faxes:** outgoing faxes queue
 - **Logout:** exit Collaboration
 - **Help:** link to the Wildix Collaboration guide (this guide)
 - **Version:** current WMS version
- 6 - User name, extension, location (if available), **User status**, **status message** (if available) and a **picture**.

User status

User status and status message

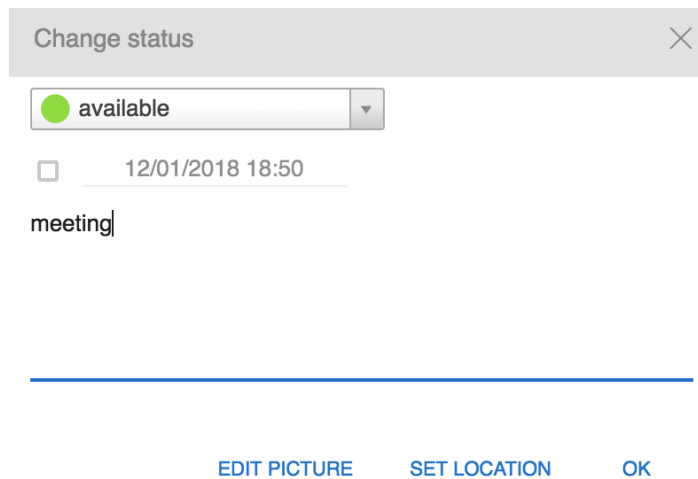
You can quickly change your user status:

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



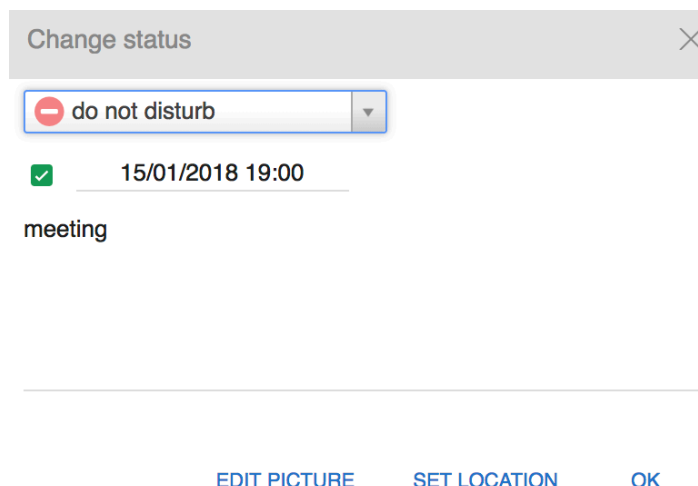
To add a status message:

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:

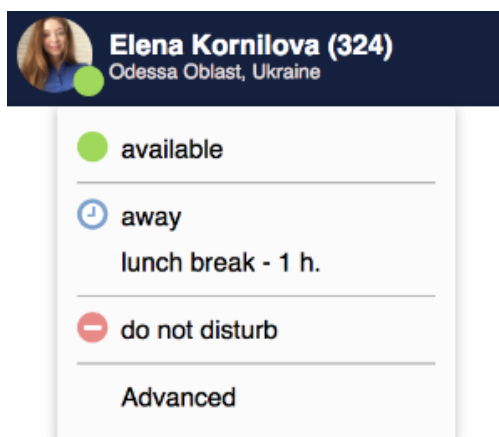
1. Click on **available** status
2. Select DND (**Do not disturb**) or **Away** from the list
3. Select **Until** date and time ("*until*" value is now optional while setting *Away/ DND* status. If it is not defined, user status switches back to *Available* after one hour)
4. Click **OK**:



It is possible to disable/ enable call/ chat/ voicemail popup notifications when in DND: 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 statuses 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:

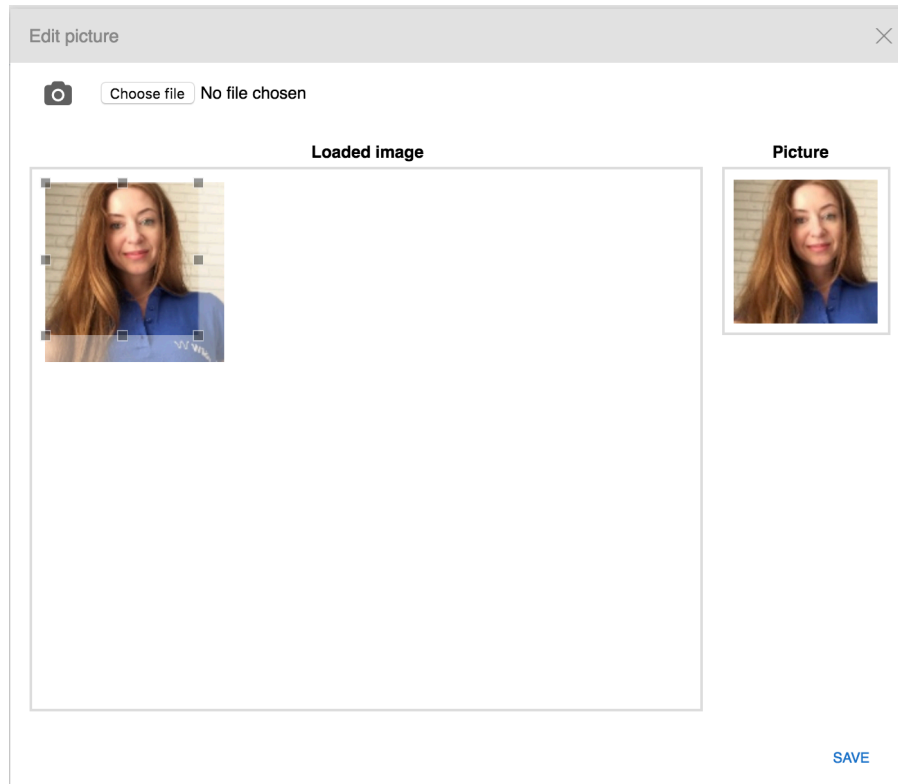


User picture

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

To set up / edit user picture:

1. Click on your user status in the top menu
2. Click **Advanced**
3. Click **Edit picture**
4. Choose the File on your PC (the picture is loaded)
5. Resize the picture (optional)
6. Click **Save**:



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

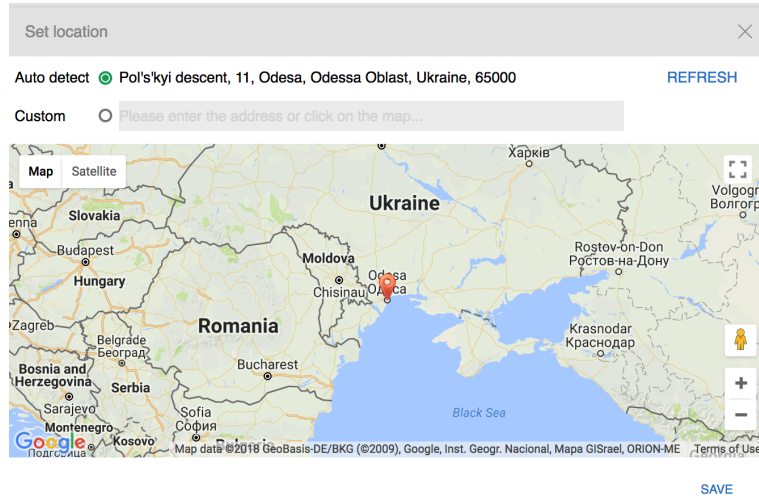
1. Click on the **Camera** button and take a picture of yourself
2. Resize the picture if needed
3. Click **Save**

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 on map**
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 *.wildix.com domain

Colleagues (roster)

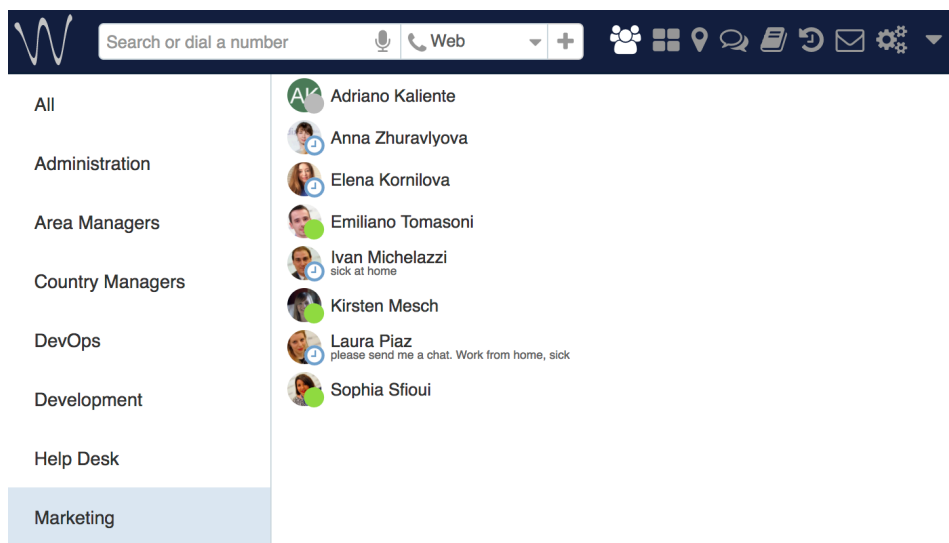
Select **Colleagues** in the top menu.

Starting from WMS version 3.87, 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.

User status, user name and user picture are displayed for each colleague.

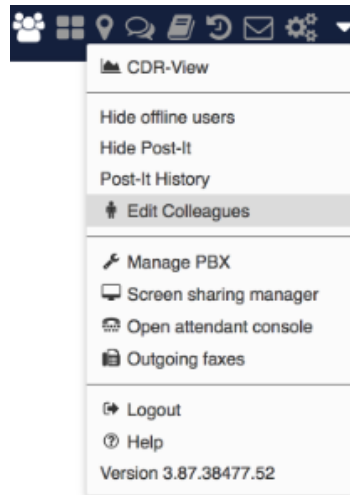
Mouse over a colleague shows additional buttons with available actions (Call / Chat / Post-It / Call me back etc):



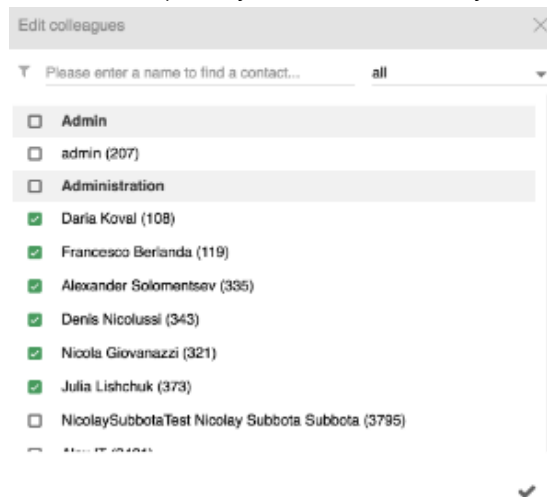
Edit colleagues list

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:

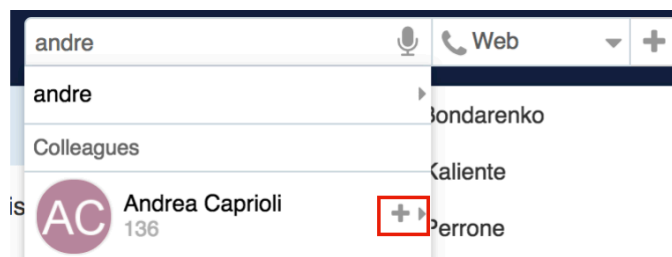


3. Click the **Tick** icon to save

Other options to add / delete colleagues from roster

Add colleagues via Search field:

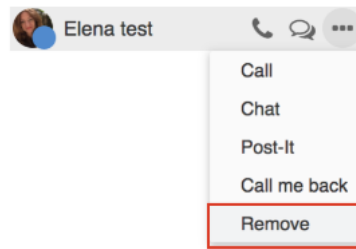
- Find a colleague by name / number and click on **+** icon:



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

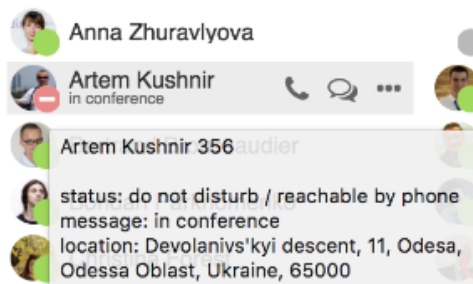
User status is synced over all Wildix devices registered to your account:

-  - 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:



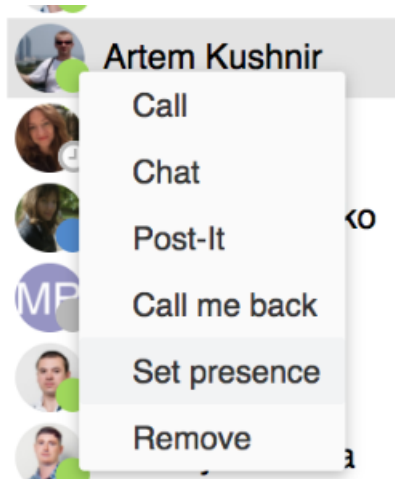
Same information can be consulted from *Messaging / Feature* keys tabs.

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)

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

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

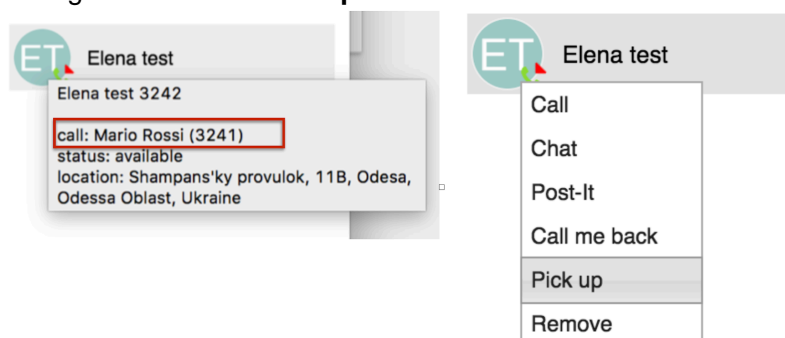
Call pickup / see who is calling

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:

- 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**



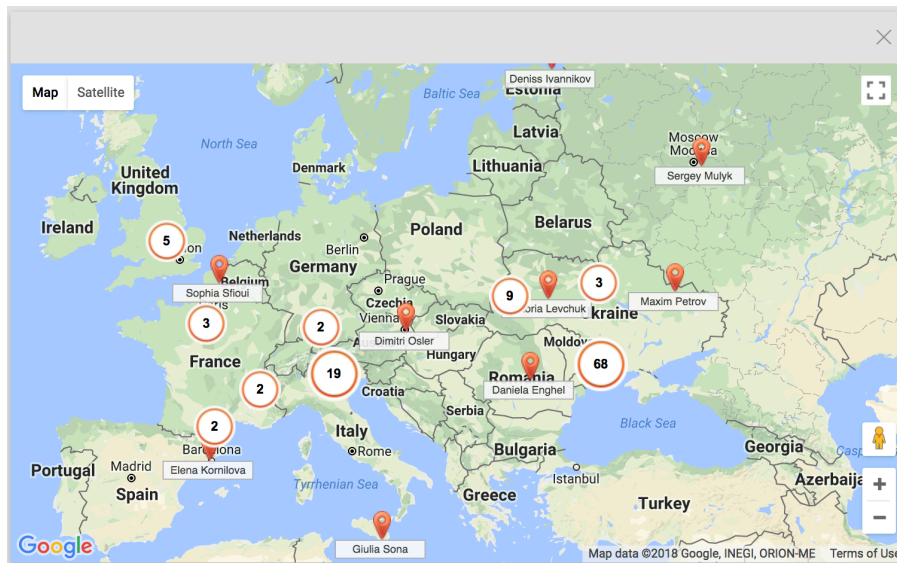
Note: only users with certain permissions can pick up calls; to enable the option, the PBX admin must add ACL ability "Can" - "Call Pickup".

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

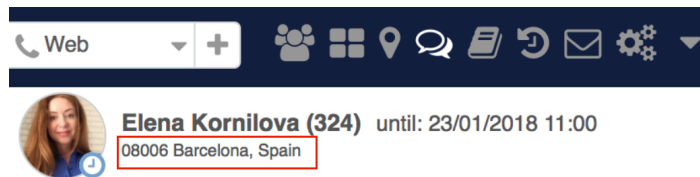
- Select **Map view** in the top menu. All colleagues who enabled location sharing are indicated on the map:



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:



From Phonebook

- Select a user and click **Show on the map** to open a geographical map where the geolocation of that user is indicated:

Note: to be able to see the geolocation of a user in Phonebook, you need to add the address when creating/ editing the contact (refer to [Create/ edit a contact](#) chapter).



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**

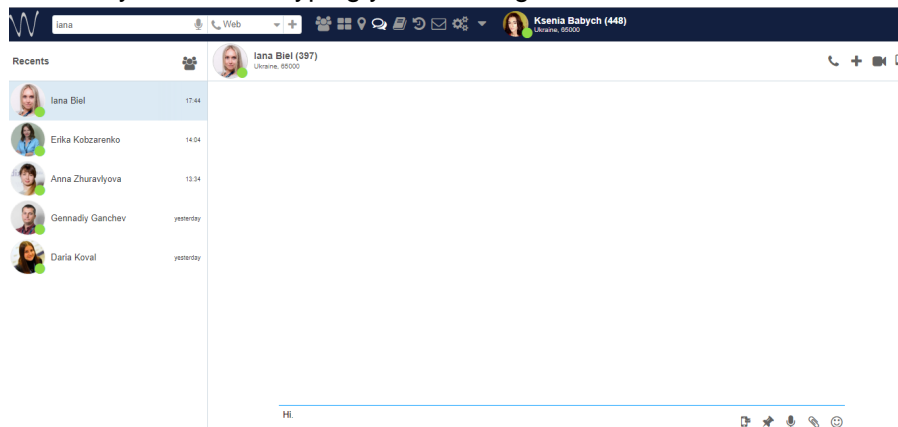
From History:

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

From call dialog during a call:

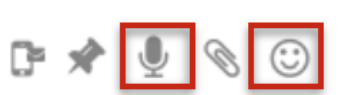
- Select **Other -> Chat** in call dialog (See Chapter: [Call Management](#))

Messaging tab opens and you can start typing your message:



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:

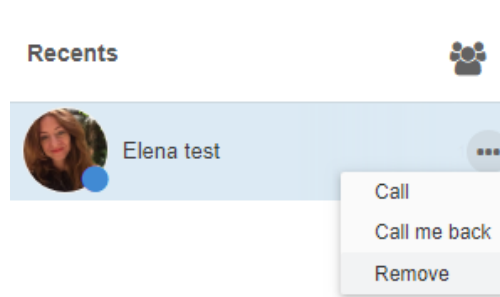


All open chat sessions are displayed in the *Recents* section (left section of the screen). You can continue a previously started chat session by clicking on a user in the *Recents* section.

Close a chat session:

Go to the **Messaging** tab -> *Recents* section:

- 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

Screen Sharing and remote control

OS requirements (for presenter)

- Mac OS X 10.11 and higher
- Windows XP and higher

Download and install the component:

- *Collaboration -> Settings -> Extensions*, “Screen Sharing Component”

Start Screen Sharing

1. Open a chat session with a user
2. Click on the **Screen** icon in the upper right section of the screen



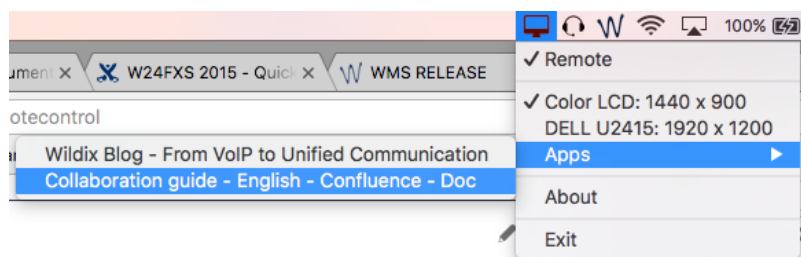
3. Screen sharing launches (screen sharing icon is displayed on the menu bar of your PC)
4. The other party must accept incoming screen sharing stream:



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

Note: Starting from WMS Version 3.88, it is possible to select the application to share via screen sharing on macOS/ Windows:

- Start a screen sharing session
- From the menu bar, click on Screen Sharing Manager -> Apps and select which application to share:



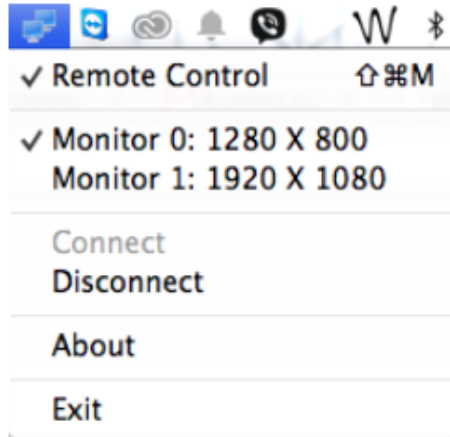
Start screen sharing during a call:

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

Remote control and screen and monitor selection

Remote control is enabled by default. To close it, uncheck **Remote Control** in the menu bar.

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

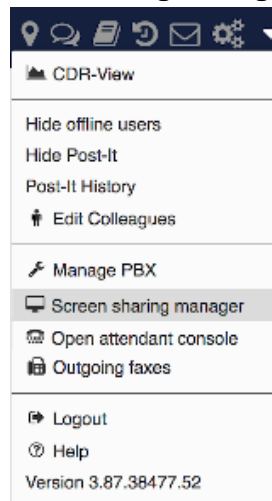


Screen sharing management

Screen sharing to multiple users is supported.

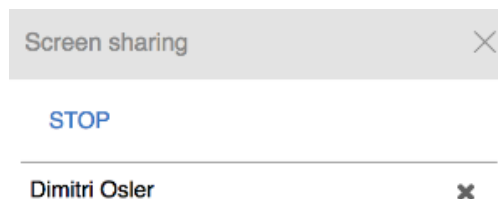
See who is connected and stop screen sharing:

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



Multiuser chat conference

Multiuser chat room with possibility to join a conference call directly from the chat room.

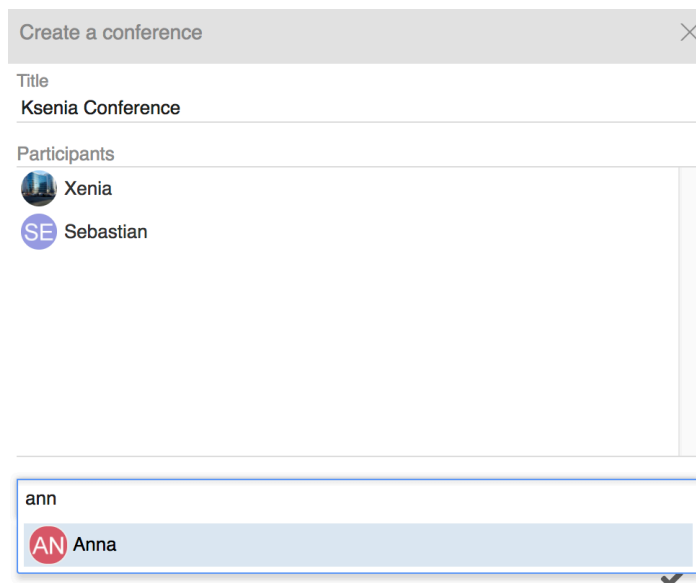
For ubiconf videoconference based on WebRTC, read the guide: [Ubiconf Videoconference](#)

Create a chat room:

1. Go to the **Messaging** tab
2. Click on **Create a Conference** icon in the upper right part of the *Recents* section and select **+ Chat conference**:



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

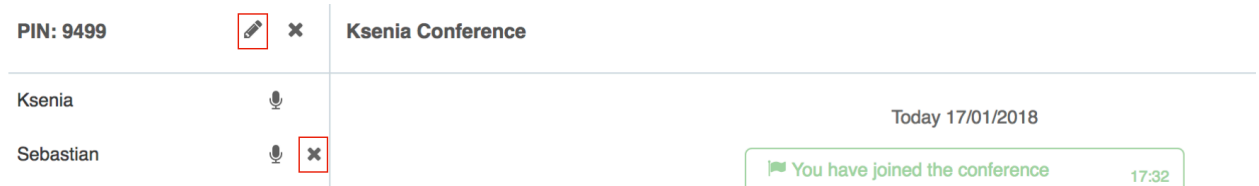


Participants receive conference invitation via chat.

Add / remove users:

Only conference manager can add and remove users.

- Add user: click on the **Pencil** icon in the conference management section
- Remove user: click on the **x** icon in front of the participant's name or while adding new users in the conference management section



Start audio:

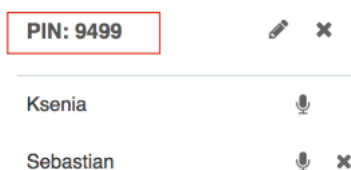
1. Click on the **Microphone** icon in front of your name to open an audio conference room
2. You receive an incoming call from the conference room; answer the call
3. Click on the **Microphone** icon in front of the participants' names to invite them to join the conference call
4. Participants join the conference as soon as they answer the call from the conference room

Call the conference room:

(available for users registered to the same PBX as the conference manager)

- Dial 98*(conference PIN), e.g.: 98*1502

Conference PIN is displayed in the conference management window:

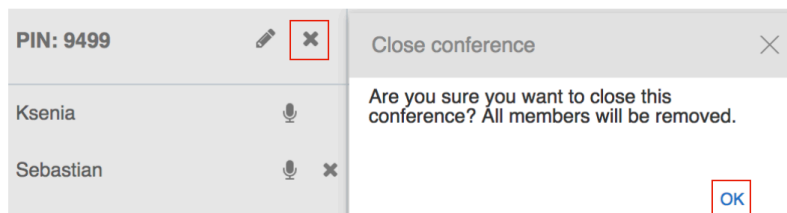


Close the chat room:

Only the conference manager can close the chat room.

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

1. Click on **x** icon in the conference management section
2. Click **OK** to confirm



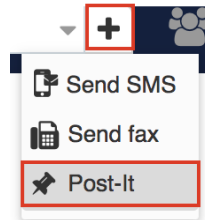
Post-It & Call me back

Post-It

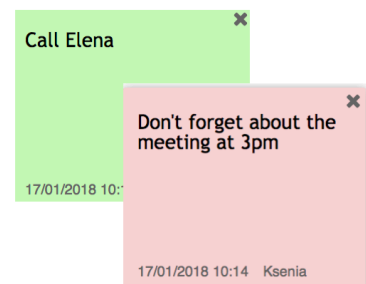
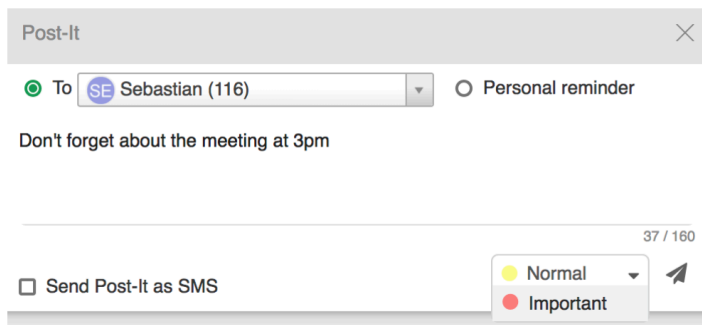
It is possible to send virtual sticky notes to users or post them on your screen as a personal reminder.

From the top menu:

- Click on **+** 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:

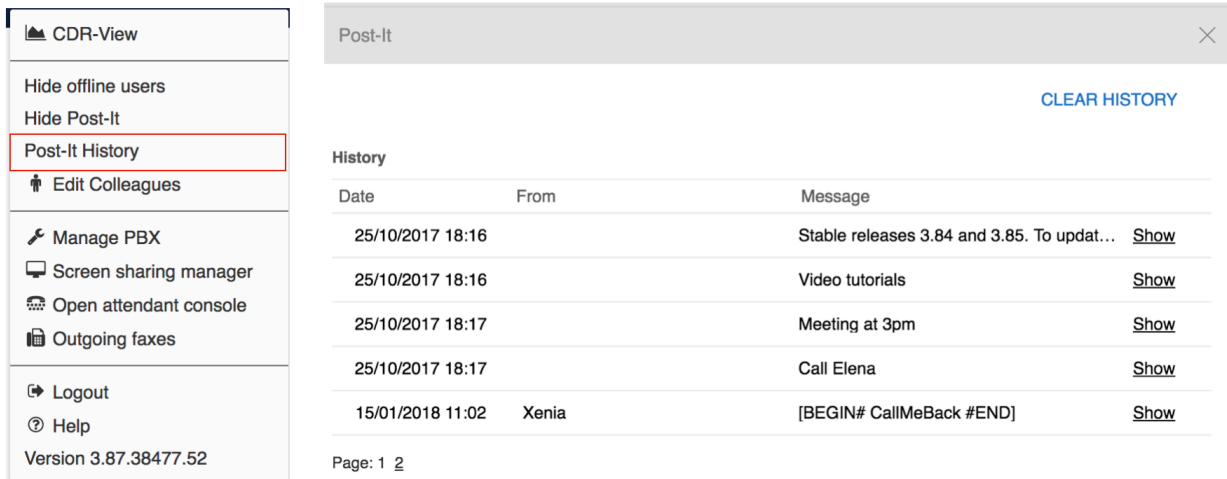
- Click on the **Post-It** icon in the lower right part of the chat session window

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

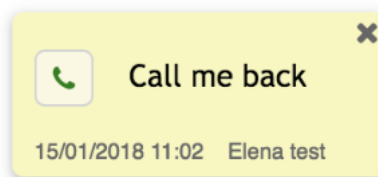
From Search field:

- 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

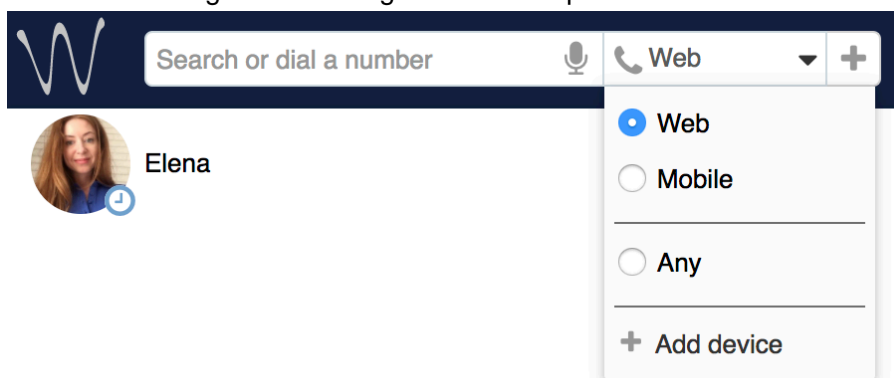
Call

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 now 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

Note: web is an embedded WebRTC-based softphone on Chrome browser and a plugin (which must be installed separately, on other supported browsers, read chapter: [Extensions](#)).

- WP, 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:

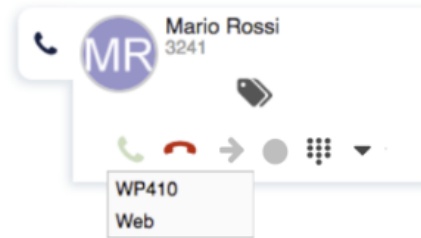
Go to Collaboration *Settings* -> *Personal*:

- *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 / 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:

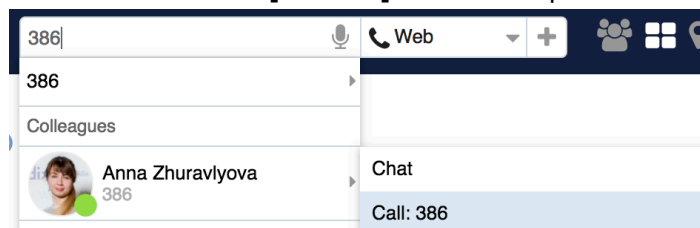
- you receive an incoming call to all your devices (answer the call from your preferred device)
- after you answer, an outgoing call is placed to the number you dialed

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:

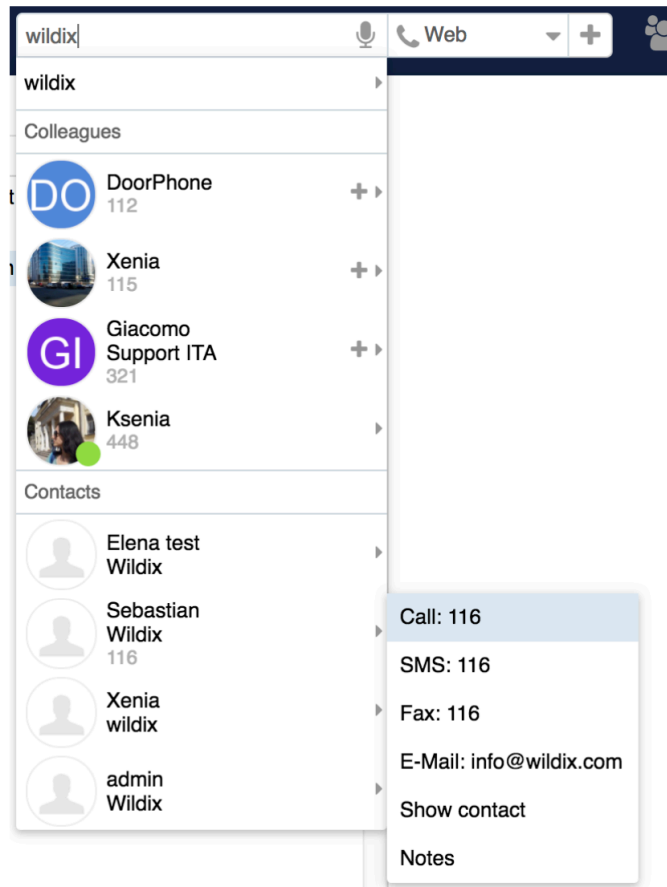
- Enter the name or number and select **Call: [number]** from the drop-down menu:



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.

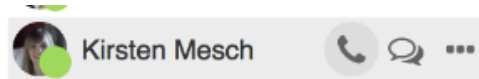
In case you would like to call a number from your contacts:

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



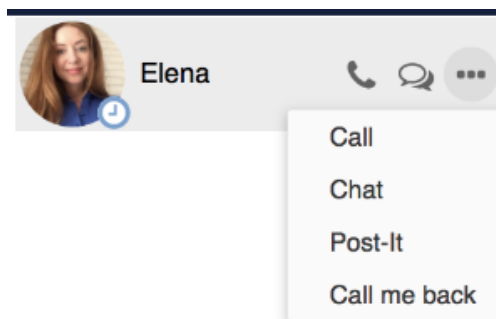
From Colleagues:

- Mouse over a colleague and click on the **Handset** icon



From Feature 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**

	All	17/01/2018	CDR-VIEW	Date	Tags	Duration
Anna Zhuravlyova	Call			Today 11:44		0:00
Ksenia Babych	Call the mobile			Today 11:15		0:35
76	Send fax			Today 11:15		0:00
Ksenia Babych	Send SMS			Today 09:43		0:00
76	Tags			Tue 16/01/2018 18:34		0:00
76	Show contact			Mon 15/01/2018 13:57		0:00
76	Archive			Mon 15/01/2018 13:57		0:00
76				Mon 15/01/2018 13:55		0:00

From Phonebook:

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

ele test phonebook - + Total found: 1

Elena test

ET Elena test Wildix

Mobile [+12345678](#)
 Home [+3806423456](#)
 Speed dial [80 324](#)
 Country Ukraine

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

All - + Total found: 37

Anna

- Call: 386
- Add contact

From Voicemail:

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

Answer a call

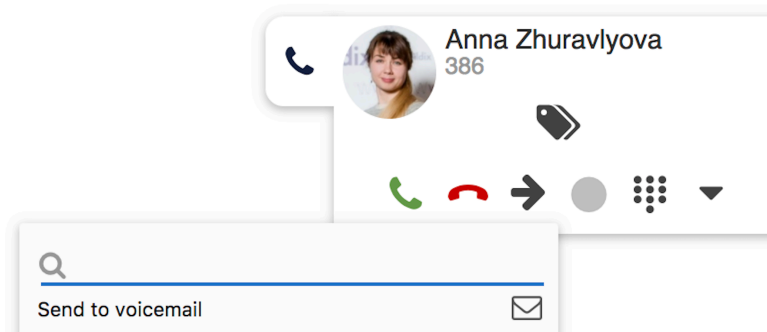
In case you have several devices registered to your account, you can decide whether all your devices must ring, or only the active one. See chapter: [Active device for calls](#).

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

Anna Zhuravlyova 386

Call dialog window showing contact name, number, and call control icons (answer, reject, forward, mute, end call).

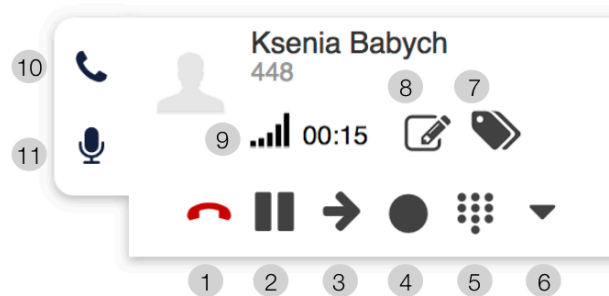
- To answer a call: click the green **Handset** icon
- To decline a call: click the **Hang up** (red) icon
- To forward a call without answering: click **Arrow** icon, select the contact to forward a call to (using search)/ or transfer a call to Voicemail:



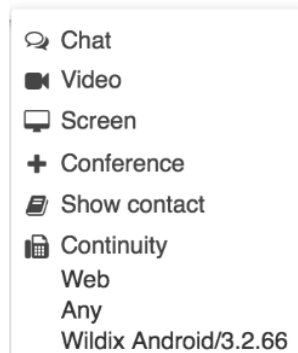
You can set up automatic call forwarding based on user status (available, DND, away) and call type (internal, external, whitelist, blacklist). See chapter: [Features](#).

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):



- 7 - Add notes, not available for calls between colleagues (See chapter: [Contact notes](#))
- 8 - Add tags (See chapter: [Setting tags](#))

- 9 - Call quality (shown only in case of a single call)
- 10 - Hide/ display a call dialog window:



- 11 - Mute/ unmute your microphone

Hold/ second call

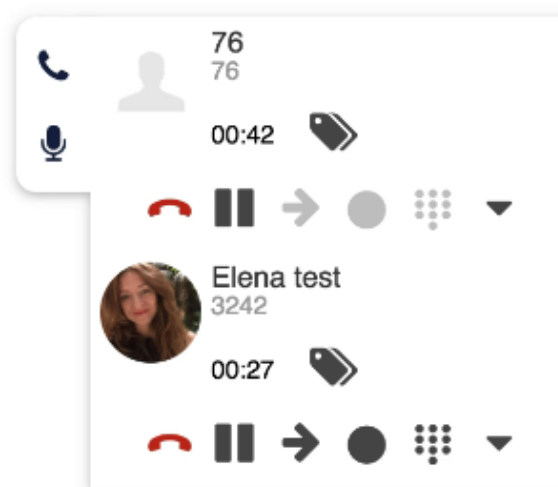
Click on the **Hold** icon during a call to put a call on hold/ to resume a call. The second party hears music on hold (set up on the WMS side).

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.

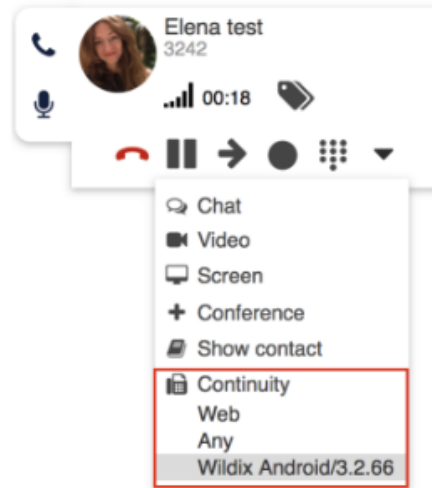
It is possible to swap between an active call and a call on hold by pressing the **Hold** icon (*Hold* icon is blinking in for the call which is currently on hold):



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 will be automatically picked up on the selected device

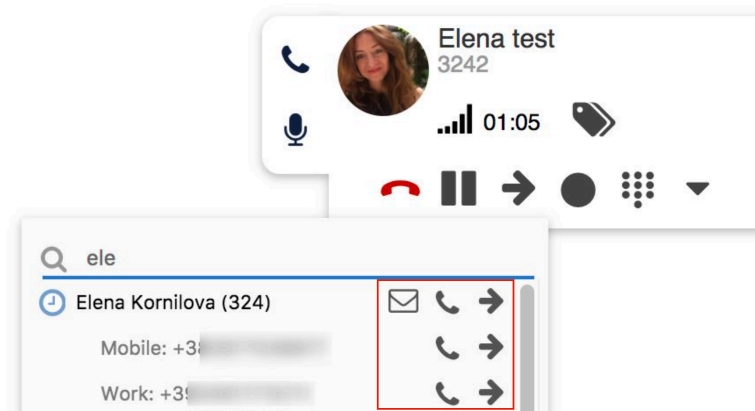


- To switch the device back to Web, dial Continuity Feature Code *5 (refer to [Feature Codes Instruction](#) for more information)

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 tutorial:

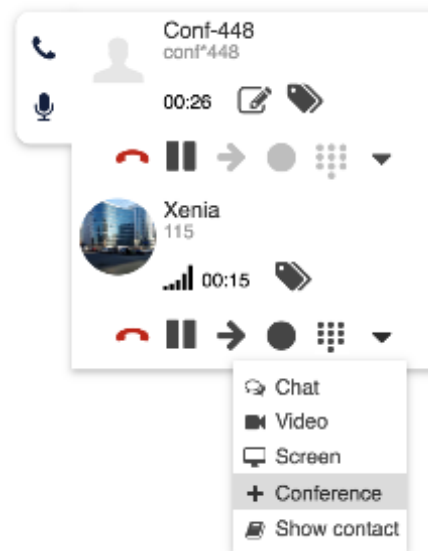
<https://www.youtube.com/watch?v=7A2Vqb9YjP0>

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 chat conference](#)

Video call

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

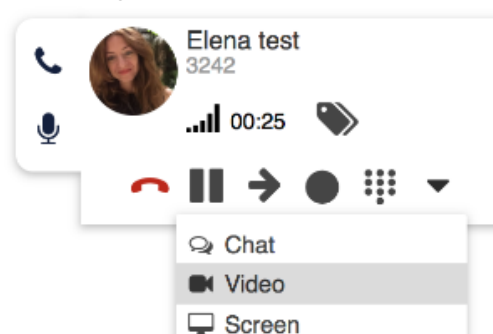
2-way video is currently fully supported between Collaboration on Chrome and:

- Collaboration on Chrome
- Kite user on Chrome
- Kite user on Firefox
- WP600ACG
- iOS / Android client
- Video intercoms / IP webcams

For more information about Intercoms integration, check documentation in the section *Intercoms*: <https://manuals.wildix.com/#developer>

Start video streaming during a call:

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



Start video call during chat:

- **Video** icon is available in *Messaging* menu (upper right corner) in Chrome browser. 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.

Call recordings are sent to a user via email and can be accessed later on via CDR-View and Collaboration -> *History*.

Attendant Console

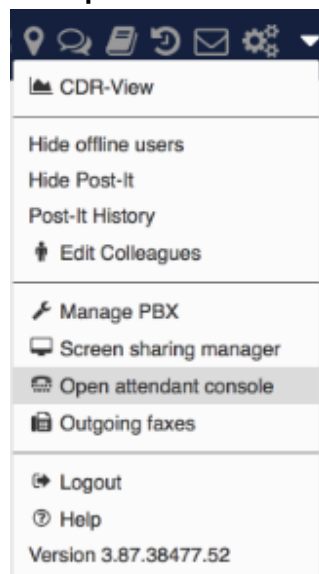
Attendant Console is an extension for call agents allowing them to monitor and manage of up to 20 lines simultaneously using a mouse or a keyboard.

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/1JCqn4EhaqGsRToeacUjpkPs0TnGdz-gH>

Open Attendant Console:

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

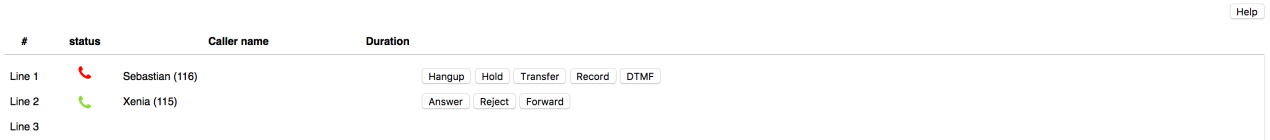


Set up a shortcut to open Attendant Console:

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

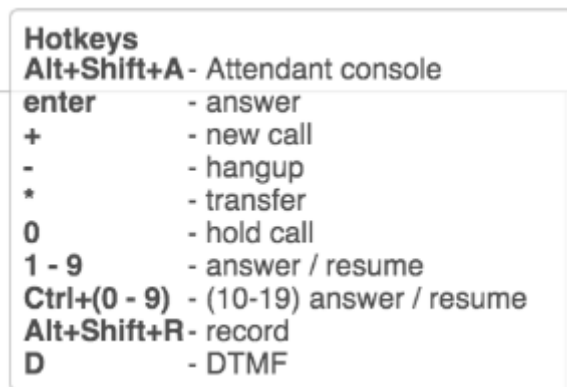
Call management via soft keys:

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



Call management via numeric keypad:

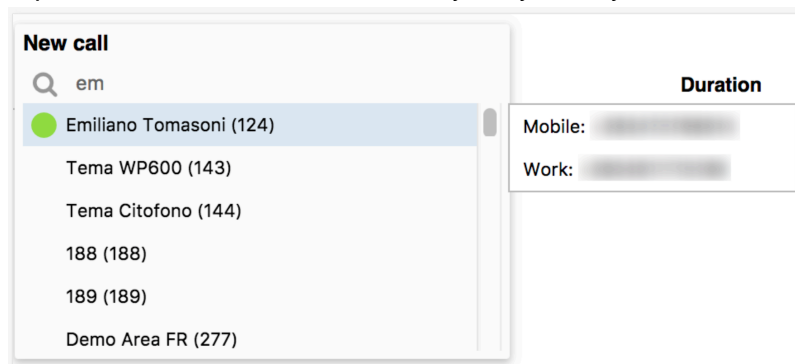
- Click **Help** to view the list of the hotkeys that allow you to manage calls via a numeric keypad:



Make a call

1. Press **+**
2. Enter the name / number (internal / external) into the search field
3. Press **Enter**

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



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

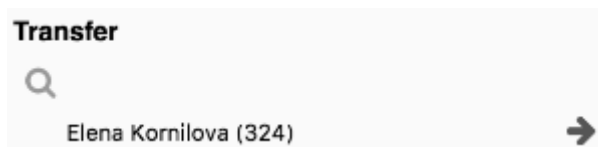
Hang up

- 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** or **Arrow** icon to transfer the call



Blind transfer

Transfer a call without consulting the recipient:

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

Record a call

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

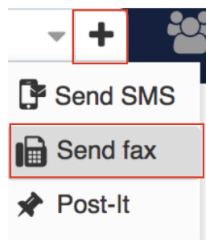
Fax / SMS

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 **More options** 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:

Send fax ✕

Fax number
Emiliano Tomasoni <+390461019978>

Fax file Choose Files

Faxcover Postpone delivery

Subject

To AM From Elena Kornilova

Phone Phone +3904611715111

Company WILDIX SRL Company wildix

Fax

Notes

0 / 600

Urgent
 For review
 Please comment
 Please reply
 Please forward

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

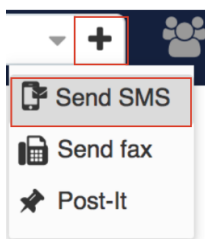
From History:

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

SMS

From the top menu:

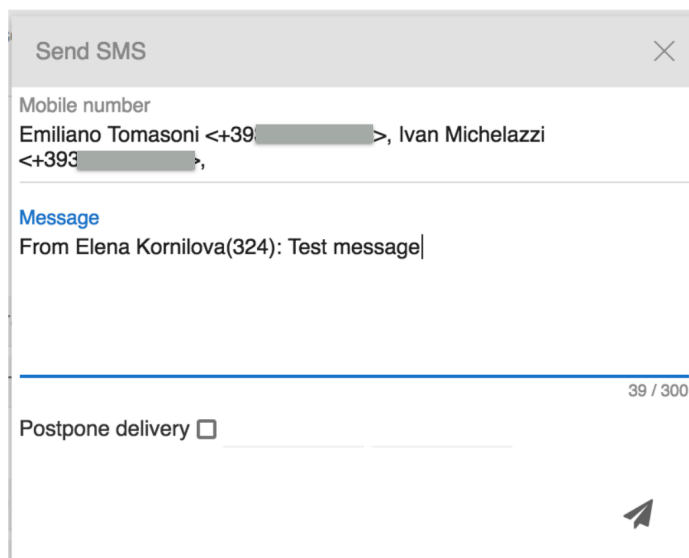
1. Click on **More options** button
2. Choose **Send SMS** from the list



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 fax 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*.

Note: In 3.87 version settings sub-menu has been moved to the left sidebar.

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 [Enable Two-factor authentication \(2FA\)](#)
- Web push: enable/ disable web push notifications (only for Chrome browser). This option is now 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 now 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
- 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

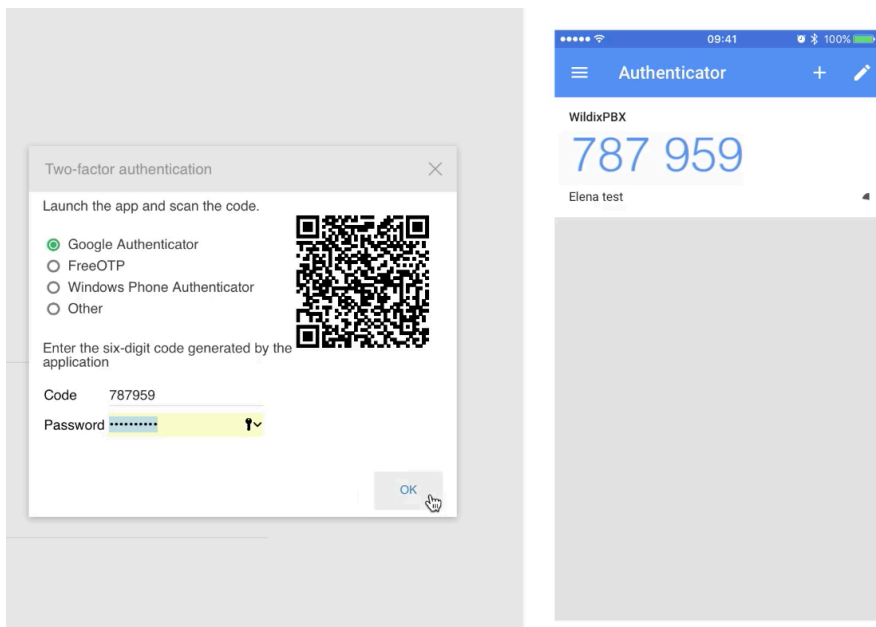
- Language: selected language is applied for Collaboration user interface, system sounds (Voicemail, IVR prompts, etc), WP4X0
- Picture: edit picture (See chapter: [User picture](#))
- Date format: select date and time format to be used on Wildix devices except W-AIR handsets (must be set up on device)
- 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](#))
- 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 (only on Windows): set up shortcut for click2call from applications / web pages (F11 by default)
 - 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 "+")
- 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.

Enable Two-factor authentication (2FA)

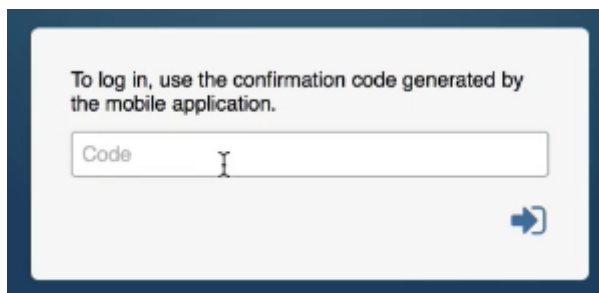
Steps to enable 2FA:

1. Download an external application to your smartphone that generates one-time passwords
2. Click on the **Pencil** icon In Collaboration *Settings* -> *Personal*, near "Two factor authentication"
3. Open the external application and scan the barcode using your smartphone
4. 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 use your device (your smartphone), refer to your PBX admin to disable 2FA and create a new password for access to Collaboration.

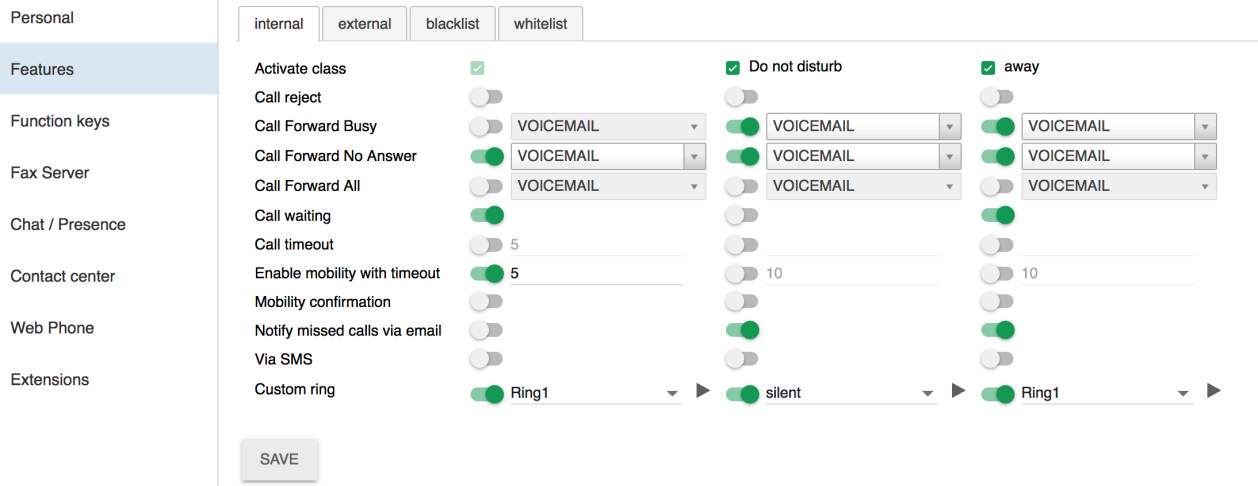
Demo video:

<https://wildix.wistia.com/medias/pvoutpcb23?wtime>

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.

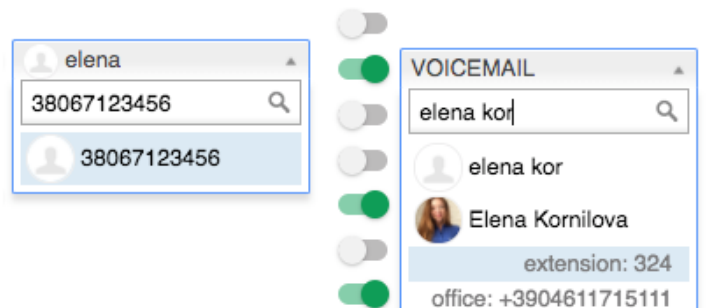
In this way it is possible to set up different behavior based on the type of call. It is possible to define type of call:

- 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:** enable to be able to receive more than one call at a time

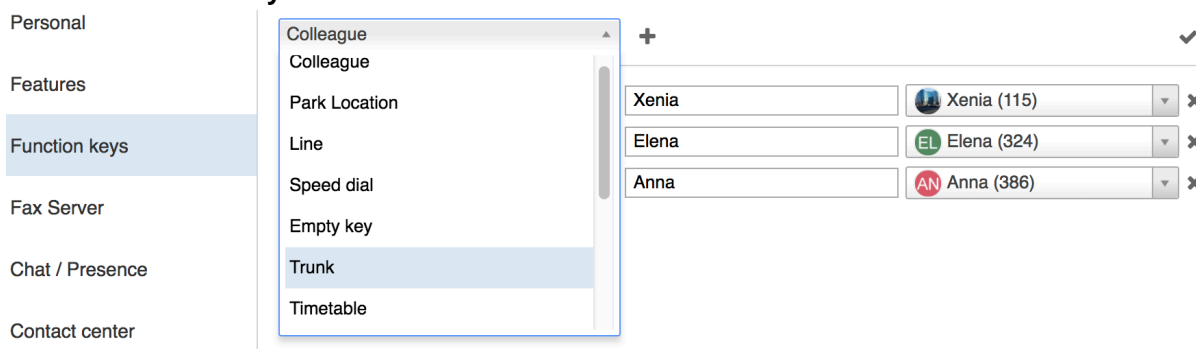
- Call timeout: if enabled, the incoming call is terminated in case there is no answer within a specified timeout
- Enable mobility with timeout: if enabled, you receive incoming calls also to your Mobility extension number (mobile number) after the specified timeout; mobile number must be configured 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 and Collaboration

Function keys

Function keys configured in this tab allow you to monitor colleagues and features from WP600AXX, WP4X0 and Collaboration -> *Function Keys* tab.

To add Function (BLF) keys:

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

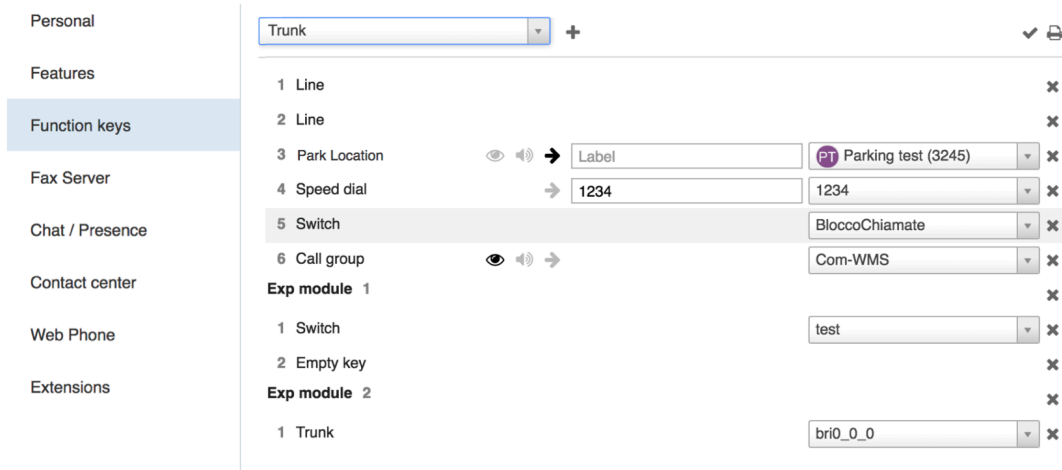


Change the order of BLF keys:

- Use Drag&Drop

To add key expansion modules (supported by WP490G):

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 Collaboration -> *Function keys* and on WP4X0 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



Demo video (Call pick up from Collaboration -> *Function keys* tab):

<https://www.youtube.com/watch?v=DAGcuB8ipss>

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

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 a trunk (except for SIP trunks)
- 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)

Call group

- Monitor if there is an incoming call to call group
- Press to dial a call group or to pick up a ringing call (when blinking) of a call group

Send DTMF

- Press to send DTMF

Fax Server

Fax cover settings:

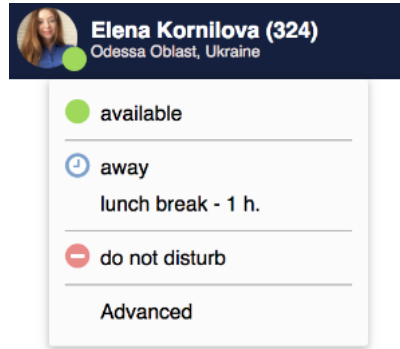
- Company logo: choose the file on your PC
- Company: company name
- Fax machine id: ID of the local fax machine (default value: Fax Server)
- Fax header: fax header to identify the fax source (default value: Wildix PBX)

Chat/ Presence

- 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 DND / Away 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 DND / Away status, proceed as follows:
 - Click on “away”: you can select to add a custom duration period for “away” or for “DND”
 - Add a status message that will be visible for other users



- Select the duration period for this status and 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 *Away* or *DND* status:



Contact center

Starting from WMS version 3.87, 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

Select active device for calls via web.

(Chrome)

- Speakers: select audio device for speakers
- Ringing: select audio device for ringtone playback
- Microphone: select audio device for microphone
- 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

(Other browsers)

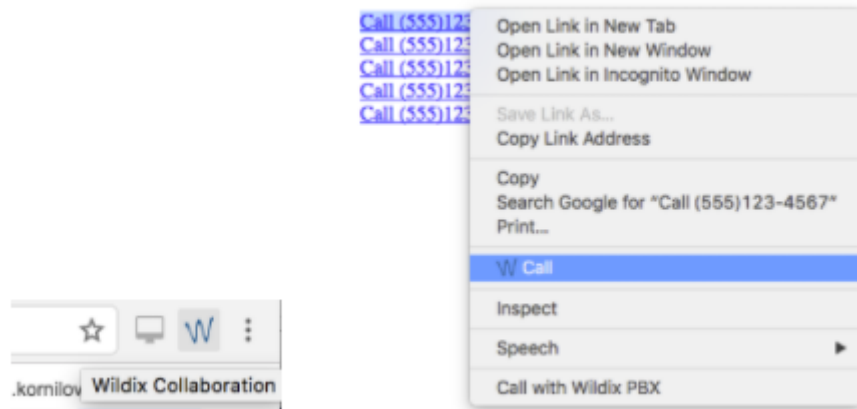
- Speakers: select audio device for speakers
- Play Gain: adjust the play gain level
- Microphone: select audio device for microphone
- Mic Gain: adjust the microphone gain level
- Autostart: uncheck the box if you wish to disable Web phone from the list of active devices (in case you have other devices 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:

- Web Phone (available for browsers other than Chrome): plugin for making and receiving calls via Collaboration on web browsers other than Chrome (WebRTC Phone is built-in on Chrome)
- 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

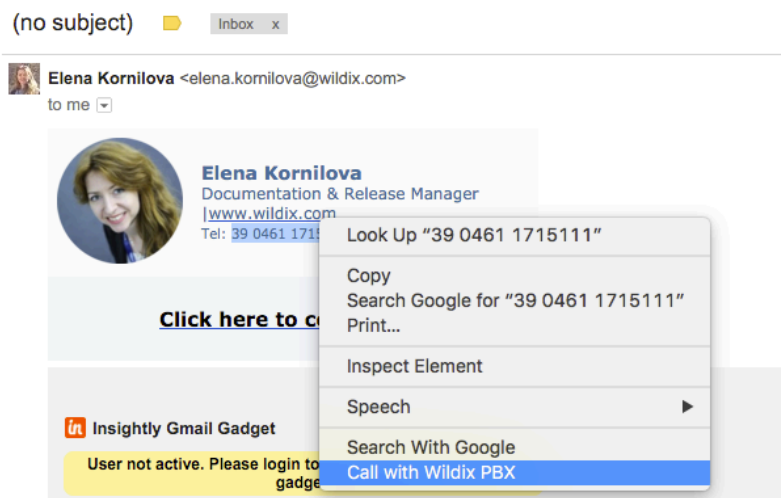
Collaboration in the web browser in case it's not running) and click2call (right-click on a phone number or a link on a web page and select Call)



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-app/klaamdejgopombbjfphlebplmokg>

- Fax Printer: this component allows sending faxes from Windows / Mac OS X applications
 Read the guide: [Fax Printer for Microsoft Windows / Mac OS X](#)
- TAPI driver (Windows only): component for making and receiving calls via Microsoft Outlook and TAPI enabled applications; also adds support for call generation by clicking on a web page link containing a phone number (URI support)
 Read the guide: [Wildix TAPI driver](#)
- Integration service: this component is required by CDR-View, Popup App and adds support for additional features:
 - Mac OS X: call generation by clicking on a web page link containing a phone number (support of "sip:", "wildix:" URI)
 - Mac OS X: call generation by right-clicking on a phone number and selecting **Call via Wildix PBX**:



- Windows: call via shortcut (Dialing hot key, configured in Collaboration Settings -> [Personal](#))

- Outlook Integration (Windows only): adds support for Calendar Sync, Presence, click2call, IM, call popup from Outlook
Read the guide: [Outlook integration for Microsoft Windows](#)
- Screen sharing component: install the component to share your desktop and provide remote access to your desktop
See chapter: [Screen Sharing and remote control](#)
- Headset integration: adds support for remote call answer / hangup and volume control from headset via USB connector on Mac OS X / Windows
Also adds support for Kuando Busylight (<https://www.wildix.com/portfolios/kuando-busylight/>)

Important: headset integration component is not compatible with SfB (skype for business).

Important: 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 Headset integration.

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

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

Other important fields (optional):

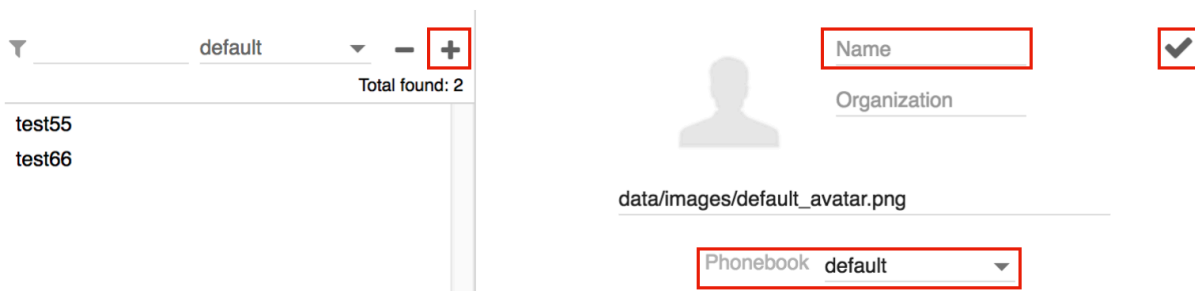
- Organization: company name
- data/images/default_avatar.png: you can upload the contact image on your server and indicate the path to the image in this field (image must be square, otherwise it appears distorted)
- Extension: this field is normally used for Colleagues
- Work / Mobile / Home / Home 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

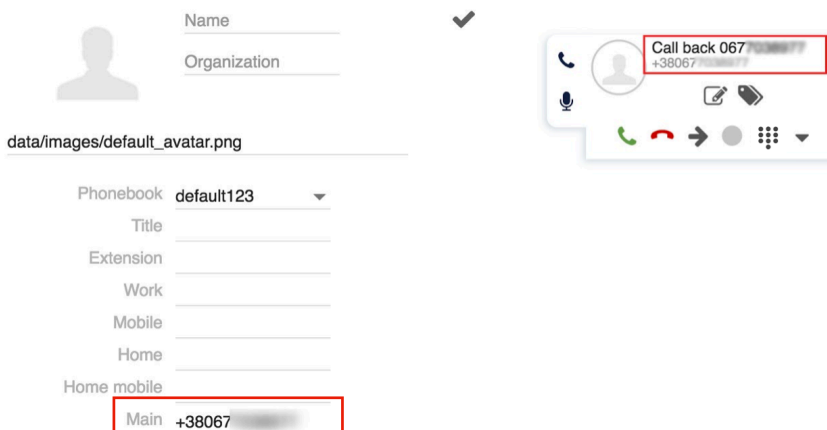
Important: these notes can be consulted only from Phonebook; for contact notes that can be displayed and added to contact during a call, see chapter: [Contact notes](#).

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



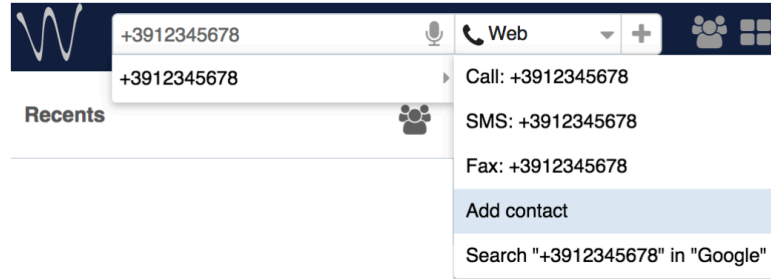
Add/ edit contact during a call:

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



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



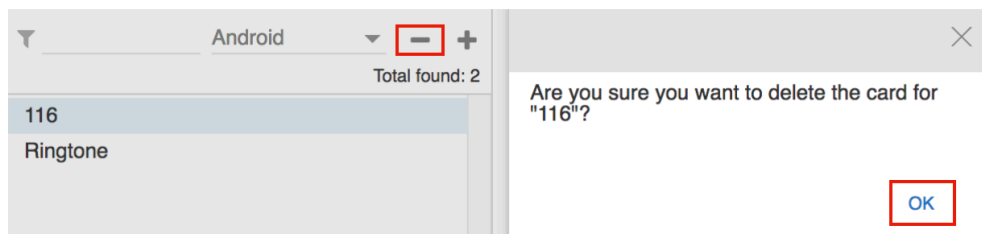
Add a new contact after a call:

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

	All	18/01/2018	CDR-VIEW	Date	Tags	Duration
Elena test (3242)				Today 17:14		0:03
Call				Today 17:08		0:13
Call the mobile				Today 17:00		0:00
Send fax				Today 15:42		0:00
Send SMS				Today 15:41		0:00
Tags				Today 15:40		0:00
Add contact				Today 15:20		0:00
Archive				Today 13:56		0:00

To 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)

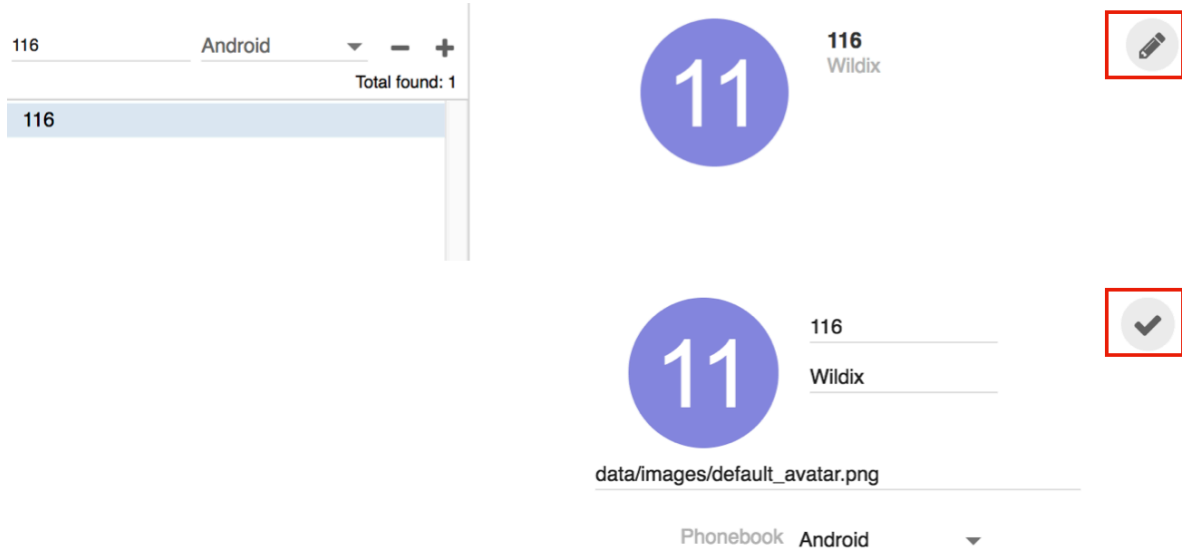


Otherwise right-click on a contact and select **Remove**:



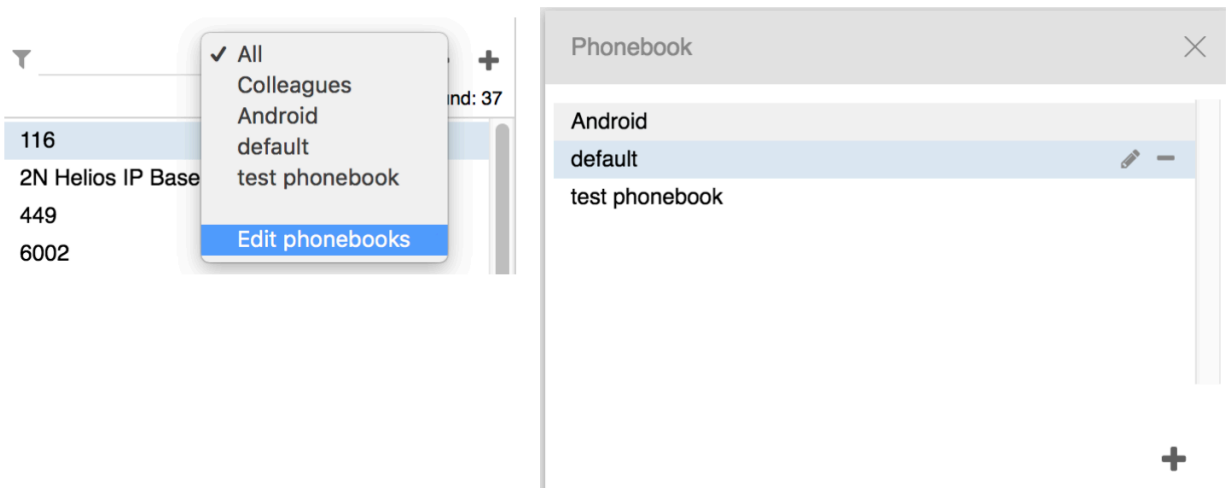
To edit a contact:

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:



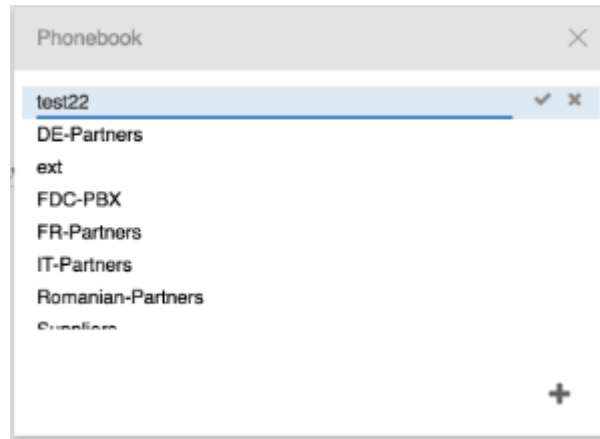
Personal phonebook

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



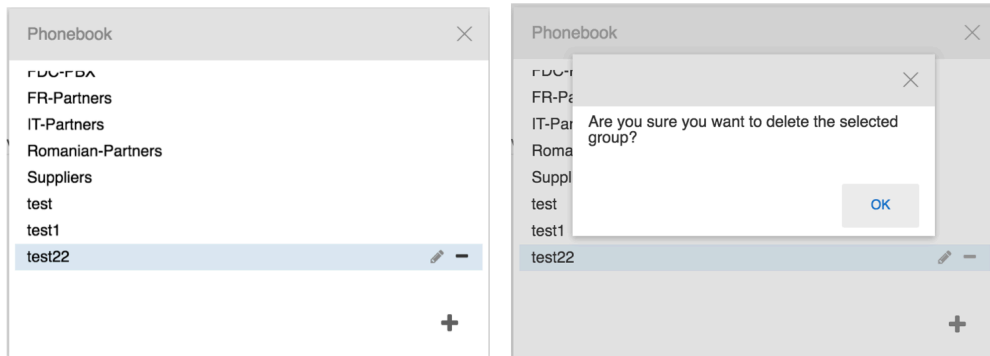
Add a personal phonebook:

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 -> Call and chat history -> "Enable contact notes"*).

Note: notes cannot be added for colleagues.

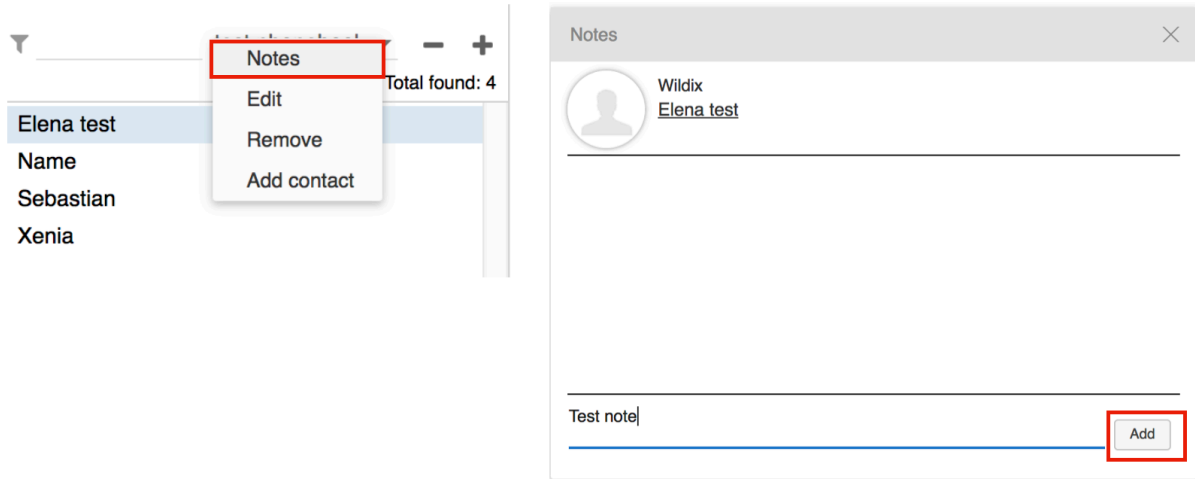
Add / display notes added to contact

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**



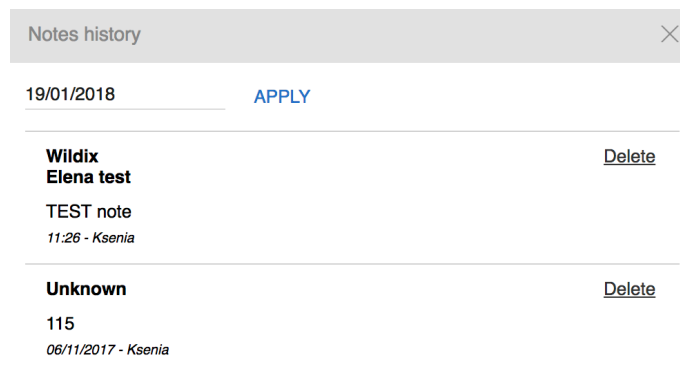
Delete option is available only for notes added by you.

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 new 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, WP600AXX, Android / iOS client, except for W-AIR handsets (W-AIR handsets display only local call history).

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:

maa	All	19/01/2018	NOTES	CDR-VIEW	Date	Tags	Duration
☎					Tue 09/01/2018 12:14		0:00
☎					Mon 11/12/2017 17:29		0:00
☎					Mon 11/12/2017 17:29		0:00
☎					Mon 11/12/2017 17:27		0:00
☎					Mon 11/12/2017 17:22		0:16
☎					Fri 24/11/2017 12:57		0:13
☎					Thu 23/11/2017 17:00		0:00

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

	All	19/01/2018	NOTES	CDR-VIEW	Date	Tags	Duration
☎	Xenia (115)				Today 10:12		0:09
☎	Xenia (115)				Today 09:39		0:31
☎	Conf-448 (conf				Today 09:39		0:42
☎	Sebastian (116)				Today 09:39		0:05
☎	Sebastian (116)				Today 09:37		0:55

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

	All	19/01/2018	NOTES	CDR-VIEW	Date	Tags	Duration
☎	Xenia (115)				Today 10:12		0:09
☎	Xenia (115)				Today 09:39		0:31
☎	Conf-448 (conf*448)				Today 09:39		0:42
☎	Sebastian (116)				Today 09:39		0:05
☎	Sebastian (116)				Today 09:37		0:55
☎	Conf-448 (conf*448)				Thu 18/01/2018 18:06		0:06
☎	Xenia (115)				Thu 18/01/2018 18:05		0:10
☎	76				Thu 18/01/2018 16:46		0:00
☎	Xenia (115)				Thu 18/01/2018 16:12		0:00

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**

	All	19/01/2018	NOTES	CDR-VIEW	Date	Tags	Duration
Xenia (115)					Today 09:39		0:31
Xenia (115)					Today 09:39		0:42
Conf-448 (conf*448)					Today 09:39		0:05
Sebastian (116)					Today 09:37		0:55
Sebastian (116)					Thu 18/01/2018 18:06		0:06
Conf-448 (conf*448)					Thu 18/01/2018 18:05		0:10
Xenia (115)					Thu 18/01/2018 16:46		0:00
76					Thu 18/01/2018 16:12		0:00
Xenia (115)					Thu 18/01/2018 16:11		0:00
Xenia (115)					Thu 18/01/2018 16:09		0:00

To recover an archived event:

1. Filter events by **Archived**

	Archived	19/01/2018	NOTES	CDR-VIEW	Date	Tags	Duration
Sebastian (116)					Today 09:39		0:05
448					Fri 24/11/2017 13:28		0:00
Xenia (115)					Thu 23/11/2017 16:26		0:04
Xenia (115)					Fri 03/11/2017 13:42		0:08

2. Right-click on an entry
3. Select **Recover**

	Archived	NOTES	CDR-VIEW	Date	Tags	Duration
Sebastian (116)				Today 09:39		0:05
448				Fri 24/11/2017 13:28		0:00
Xenia (115)				Thu 23/11/2017 16:26		0:04
Xenia (115)				Fri 03/11/2017 13:42		0:08
Xenia (115)				Fri 03/11/2017 13:41		0:19
Test for checking Feature C				Fri 27/10/2017 18:42		0:07

To delete an event:

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

Note: deleted events cannot be recovered.

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

Download faxes and call recordings

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

	Fax out	18/01/2018	NOTES	CDR-VIEW	Date	Tags	Duration
	Xenia (115)				Today 16:12		0:00
	Xenia (115)				Today 16:11		0:00

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

	All	18/01/2018	CDR-VIEW	Date	Tags	Duration
	Elena test (3242)			Today 17:08		0:13
	Elena test (3242)			Today 17:00		0:00

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.

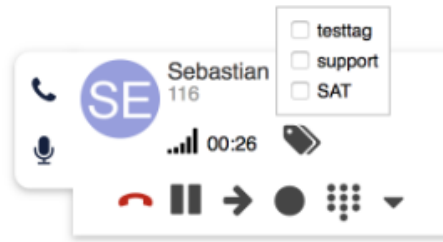
Set/ edit tags for past calls

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:

The screenshot shows two views of the call history. The top view shows a list of calls with a context menu open over the 'Xenia (115)' entry at 'Today 13:59'. The menu options are: Call, Call the mobile, Send fax, Send SMS, Send e-mail, **Tags** (highlighted with a red box), Chat, Show contact, Archive, and Delete. The bottom view shows the same list with the 'Tags' menu open, where 'testtag' is checked, 'support' is unchecked, and 'SAT' is unchecked.

Set tags during a call

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



Voicemails

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

Listen to Voicemails

- Click the **Download** icon:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Date	Duration
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Today 10:58	0:01
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Thu 18/01/2018 11:28	0:01

Mark Voicemail as read

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

Delete Voicemails

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

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Date	Duration
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Today 10:58	0:01
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Thu 18/01/2018 11:28	0:01
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Tue 16/01/2018 13:33	0:01

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).

Select the duration period and click on the + icon