



Cleod9 Collaboration (PC) – User Guide

This guide explains how to access and to use Collaboration and explains the basic operations: call, chat, video call, conference, fax, SMS.

- [Prerequisites](#)
- [First time login](#)
- [Quick menu introduction](#)
- [Colleagues \(roster\)](#)
 - [Edit colleagues list](#)
 - [User status icons explanation](#)
 - [Colleagues status information](#)
 - [Call pickup / see who is calling](#)
 - [Map view of colleagues](#)
- [User status](#)
 - [User status and status message](#)
 - [User picture](#)
 - [Geolocation](#)
- [Instant Messaging](#)
 - [Start a chat session](#)
 - [File transfer](#)
 - [Screen Sharing and remote control](#)
 - [Multiuser chat conference](#)
- [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](#)
 - [Call features](#)
 - [Function keys](#)
 - [Fax Server](#)
 - [Web Phone](#)
 - [Outlook integration](#)
 - [Extensions](#)
- [Phonebook](#)
 - [Create / edit a contact](#)
 - [Personal phonebook](#)
 - [Contact notes](#)
- [Calls / faxes history](#)
 - [Download faxes and call recordings](#)
 - [Setting tags](#)
 - [Voicemails](#)

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

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: (Essential) access to full features described in the current User Guide
- Kite: (Business) possibility to create ubiconf video conferences and be contacted via Kite link
- CDR-View: (Premium) access to advanced monitoring and reporting tool
-

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 to log in

You can enable single sign-on with your Google or Office 365 email for access to Collaboration, 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:

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

Video tutorial: <https://www.youtube.com/watch?v=iw6jkhIDzCI>

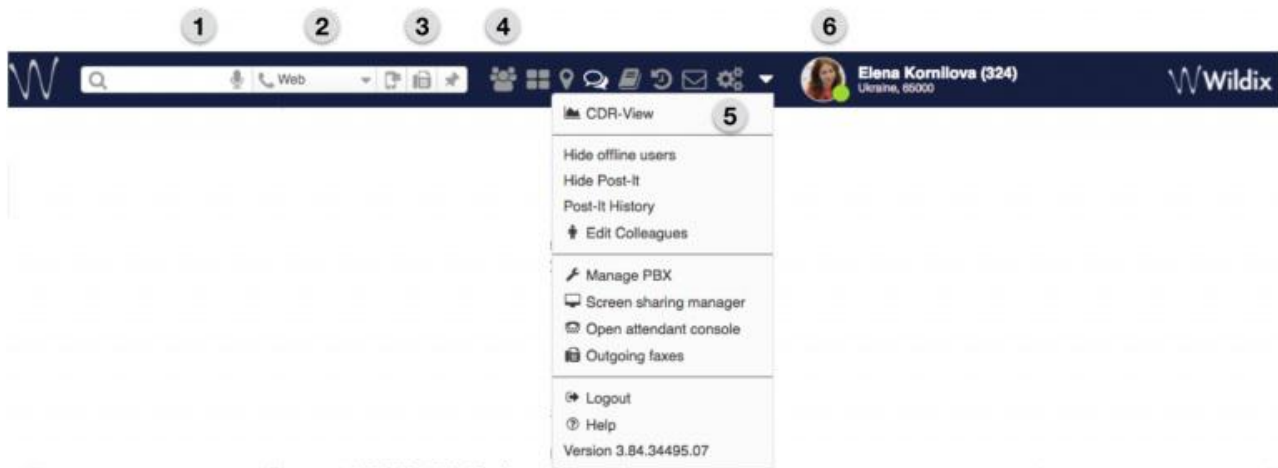
Basic settings

Select “Settings” in the top menu > Personal:

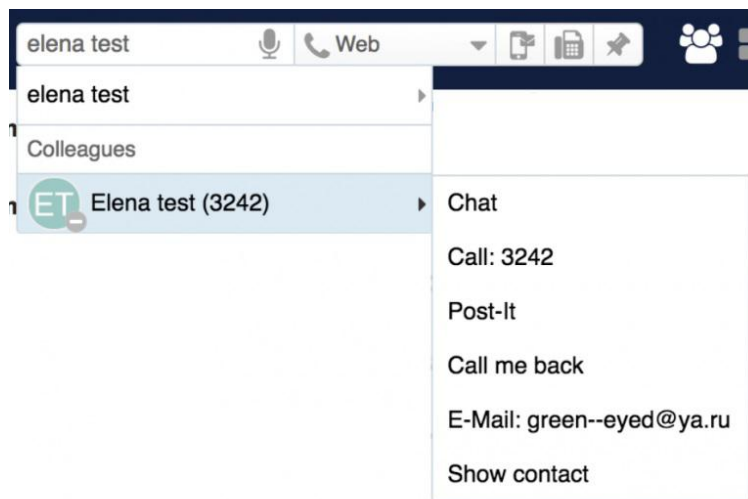
- **E-mail address:** used for email notifications about new Voicemails, missed calls, unread chat messages, call recordings, fax reports etc
- **Mobile:** mobile number for Mobility extension which allows you to make and receive calls via Wildix PBX using your mobile phone
- **Language:** selected language 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 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 etc:



- **2 – Device selection**: active device to place and answer using Collaboration
- **3 – SMS / Fax / Post-It**: quick buttons to access SMS, Fax, Post-It dialog windows
- **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)
 - **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
 - **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 list](#)
 - Manage PBX: access to WMS (restricted to users of “admin” type)
 - Open [Attendant Console](#) (if not restricted by license)
 - Outgoing faxes: outgoing faxes queue
 - Logout: exit Collaboration
 - Help: link to Wildix Collaboration guide (this guide)
 - Version: current WMS version
- 6 – User name, extension, location (if available), [User status](#), [status message](#) (if available) and [picture](#).

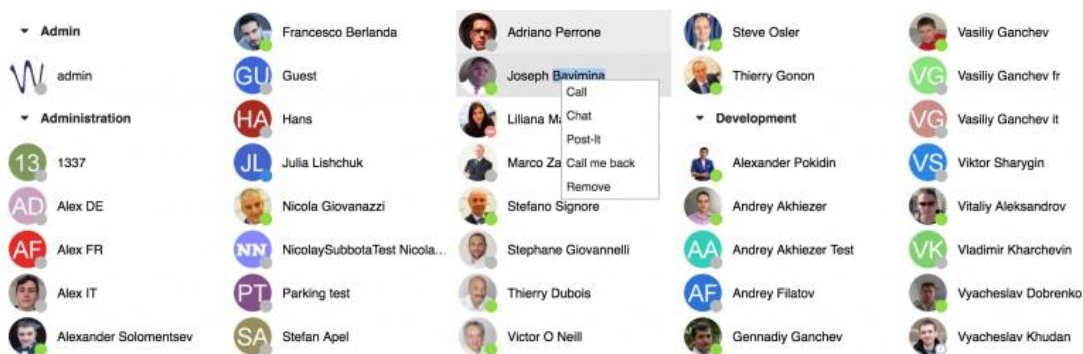
Colleagues (roster)

Select “Colleagues” in the top menu.

Users are subdivided by work teams (managed on the WMS side).

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

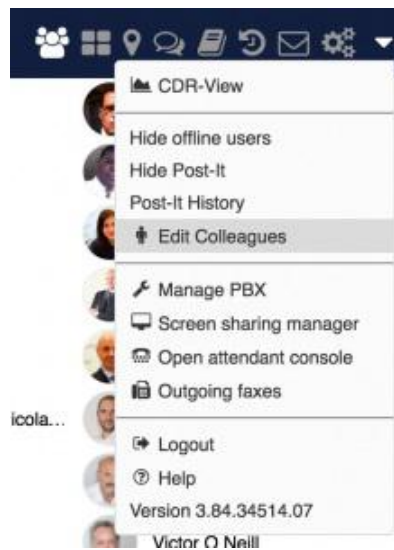
Right-click on a colleague opens a drop-down list with available actions (Call / Chat / Post-It / Call me back etc):



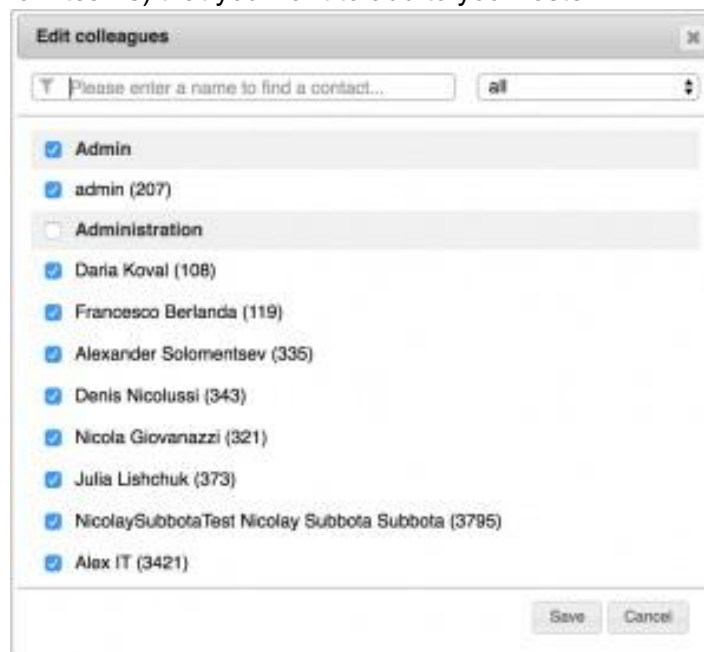
Edit colleagues list

User is prompted to edit colleagues upon the first login to Wildix Collaboration.

1. Select “Other” in the top menu > Edit Colleagues



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

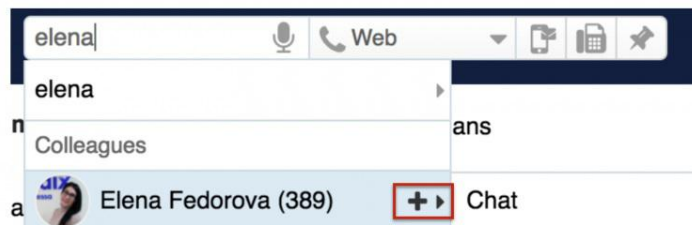


3. Click “Save”

Other options to add / delete colleagues from roster

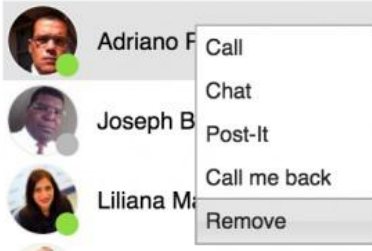
Add colleagues via Search field:

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










Delete colleagues via Colleagues tab:

- 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 Colleagues tab and focus the mouse cursor on the colleague:



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

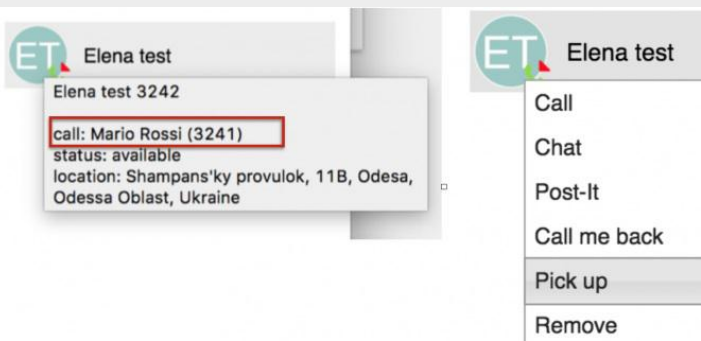
Call pickup / see who is calling

See who is calling:

- Go to 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:

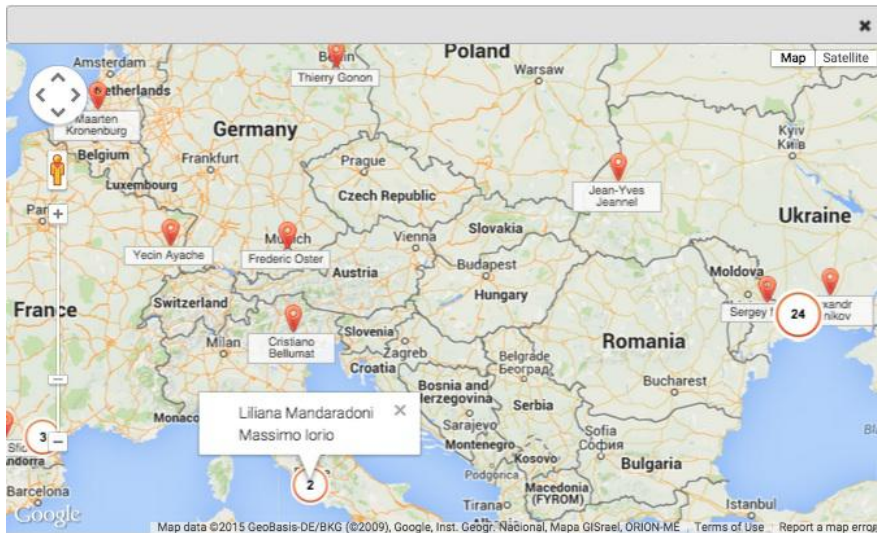
1. Go to Colleagues tab
2. Right-click on a colleague who has a ringing call
3. Select "Pick up"



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.

Select "Map view" in the top menu:



User status

User status and status message

To add a status message:

1. Click on your user status in the top menu
2. Enter the status message into the field:
3. Click “OK”

Change status

available

meeting...

Edit picture

Set location

OK

To set up DND / Away status:

1. Click on “available”
2. Select DND (Do not disturb) or Away
3. Select “until” date and time (if not defined, user status switches back to “available” after one hour)
4. Click “OK”

Change status

away

until: 17/02/2017 15:00

meeting...

Edit picture

Set location

OK

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

- Collaboration Settings > Personal > “Show notifications in DND status”

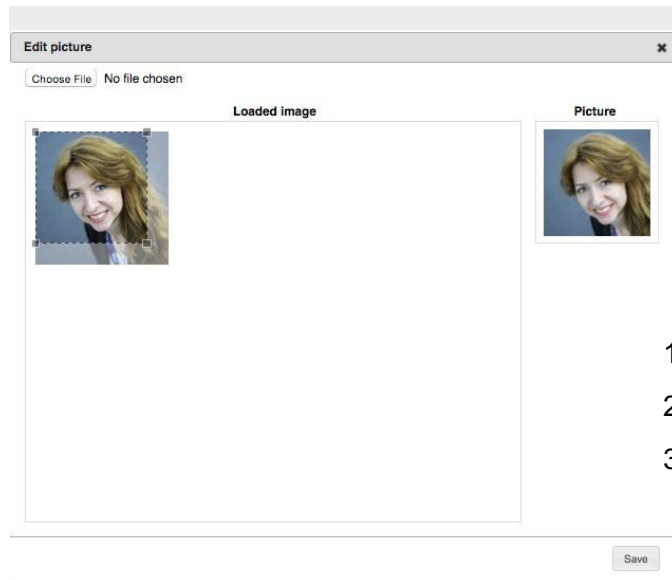
It is possible to set up the system to manage incoming calls based on

your current user status (available, DND, away) and on call type (internal, external, whitelist, blacklist). See chapter: [Call features](#)

User picture

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

1. To set up / edit user picture:
2. Click on your user status in the top menu
3. Click “Edit picture”
4. Choose the File on your PC (the picture is loaded)
5. Resize the picture (optional)
6. Click “Save”



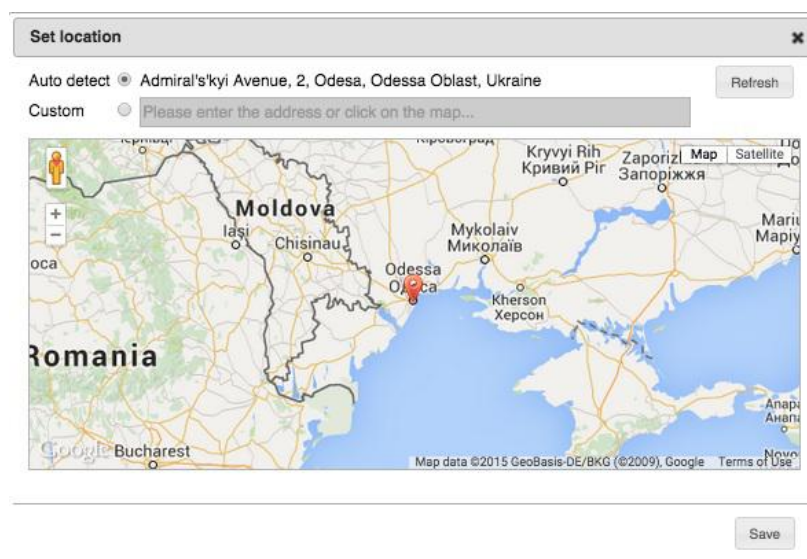
Geolocation

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
2. Click on “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 on “Save”



Instant Messaging

Start a chat session

From Search field:

- Enter the colleague name / extension and select “Chat” from the drop-down menu

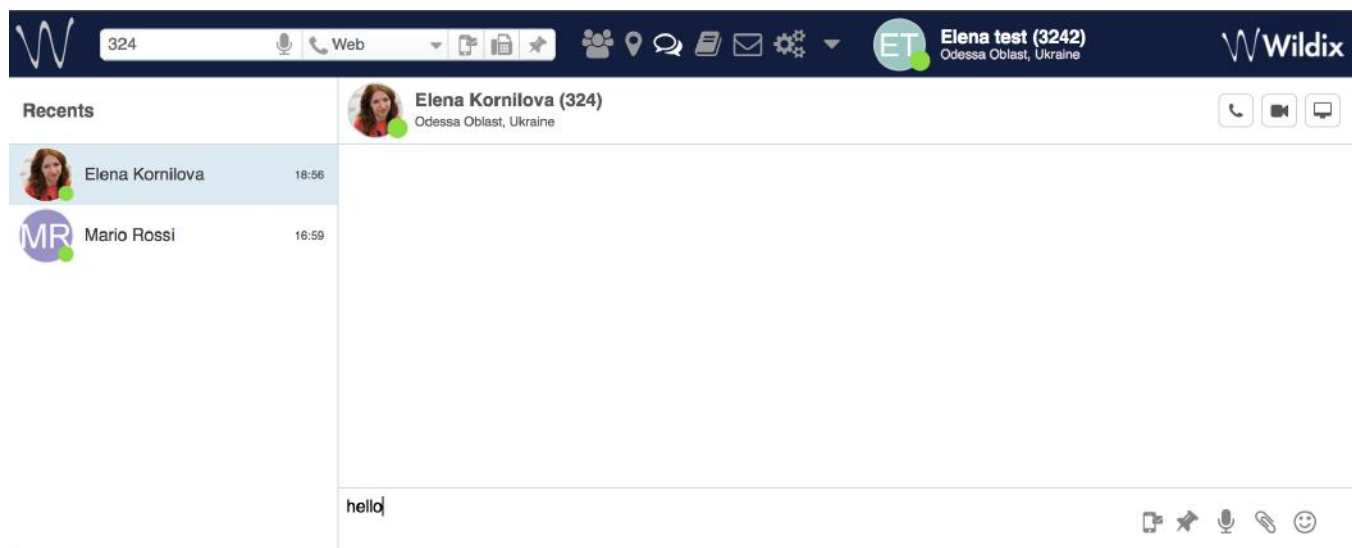
From Colleagues / Feature keys / History:

- 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.

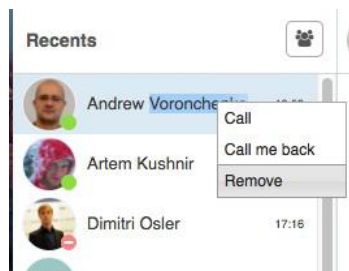
Use emoticons: click on the smile icon in the lower right section of the chat session window to open the list of emoticons.



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 chat session:

1. Right-click on a user in the “Recents” section
2. Select “Remove”



Chat history

To load chat history with a user, open the chat session with this user and scroll up to the top of the chat session window and select the period (up to 30 days):



the following features:

- file sharing on Safari / IE / Edge web browsers (for files up to 100 Mb)
- file preview (for files up to 100 MB)
- file remains available for download in the chat window (for files up to 100 MB)

Current WMS version 3.83 implements point-to-point file sharing, which:

- is supported only by Chrome / Firefox web browsers
- once the file has been downloaded, does not give you the possibility to download it again
- requires the recipient to accept the file transfer, before the download starts:



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 10.8 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:

Incoming Screen Sharing stream [Open](#), [Reject](#)

15:26

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

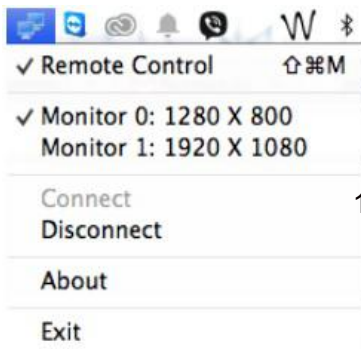
Start screen sharing during a call:

- Select “Other” -> “Screen sharing” in call dialog (See Chapter: [Call Management](#))

Remote control and monitor selection

- Remote control is enabled by default, to close it, uncheck the “Remote Control” in the menu bar.

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

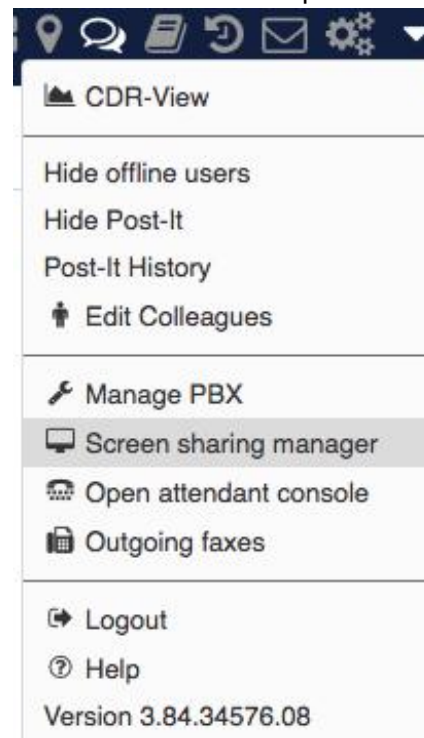


Screen sharing management

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:

Create a chat room:

1. Go to Messaging tab
2. Click on the 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 “Create”

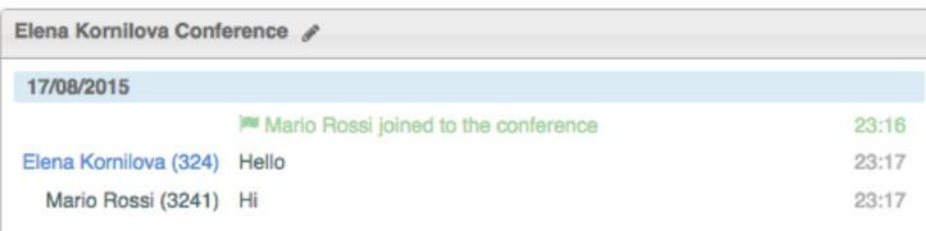
Participants receive conference invitation via chat.

Multiuser chat starts automatically once the participants join the conference.

Add / remove users:

Only conference manager can add and remove users.

- Add user: click on the “+” icon in the conference management section.
- Remove user: click on the “x” icon in front of the participant’s name.



Start audio:

1. Click on the

microphone icon in front of your name to open an audio conference room

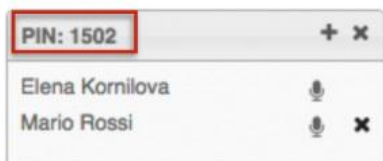
2. You receive an incoming call from the conference room; answer the call
3. Click the microphone icon in front of the participants’ names to invite them to join the conference call
4. Participants join the conference as soon as they answer the call from the conference room

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:

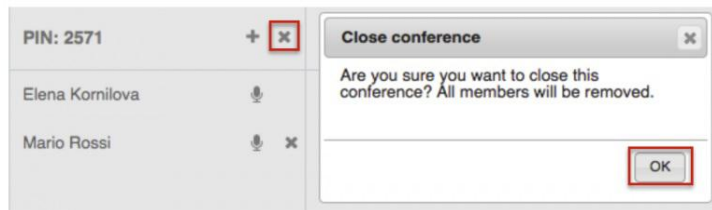


Close the chat room:

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 the “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 Top menu:

Click “Post-It” icon:



- To: select the Post-It recipient
 - enter the user name / extension
 - otherwise tick off “Personal reminder” 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

Post-It [X]

To: Emiliano Tomasoni (124) Personal reminder Symbols left: 135

Don't forget to call Anna

☐ Send Post-It as SMS

Normal Important

meeting at 3pm
15/08/2015 15:39

call Anna
15/08/2015 15:39

From
Search
field:

- Enter the

colleague name / extension and select “Post-It” from the drop-down menu

From Colleagues / Feature keys / History:

- Right-click on a colleague and select “Post-It”

From Messaging:

- Click “Post-It” icon in the lower right part of the chat session window
- Right-click on a colleague from “Recents” section and select “Post-It”

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

CDR-View

Hide offline users

Hide Post-It

Post-It History

Edit Colleagues

Manage PBX

Screen sharing manager

Open attendant console

Outgoing faxes

Logout

Help

Version 3.84.34576.08

Post-It [X]

Clear history

Date	From	Message	
15/08/2015 15:39	Me	meeting at 3pm	Hide
15/08/2015 15:39	Me	Call Anna	Show
15/08/2015 15:39	Me	call Anna	Hide

Page: 1

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 / History tab:

- 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 the green button.

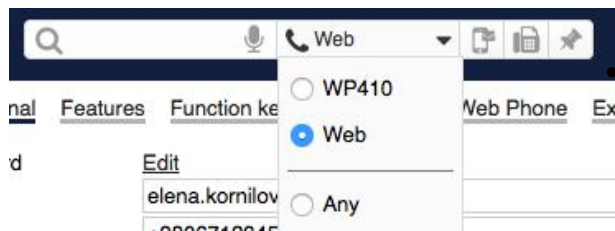


Call

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), smartphone apps (iOS / Android) and mobility extension (mobile phone).

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



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 user
- Any: possibility to select an active device upon placing / receiving a call

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:

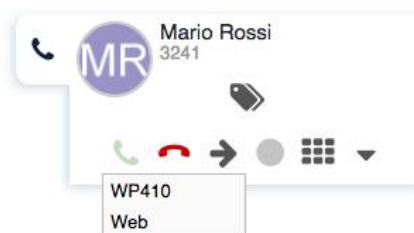
Go to Collaboration Settings > Personal

- “Ring only active device” enabled: only active device selected in 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 button, the moment you receive an incoming call:

Outgoing calls



In case you have selected WP / W-AIR / iOS/Android / Mobility device: outgoing calls are made using this device.

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

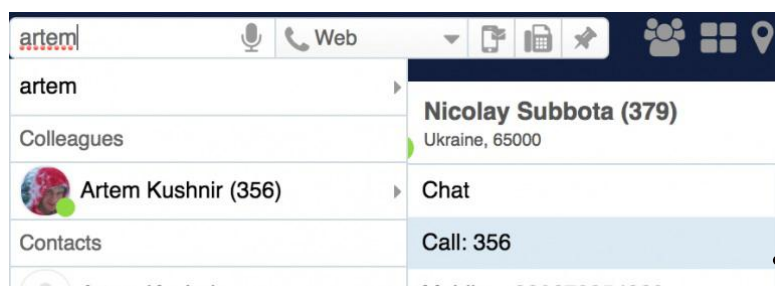
1. you receive an incoming call to all your devices (answer the call from your preferred device)
2. after you answer, an outgoing call is placed to the number you dialed

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 the microphone icon (make sure the microphone is connected to your PC) and start talking, the system transforms your speech into text.

From Colleagues / Feature keys:

- Right-click on a colleague and select “Call”

From Messaging:

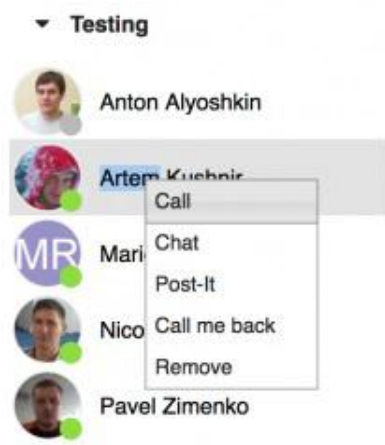
- Click “Call” icon in the upper right part of the chat session window
- Right-click on a colleague from “Recents” section and select “Call”

From History:

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

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”

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:

		Date	Duration
Elena test (003804821113)		Today 12:20	0:00
Elena t (003804821113)		Today 12:19	0:00
Elena t (003804821113)		Today 12:17	0:00
76	Send fax	Fri 03/02/2017 11:35	0:00
76	Send SMS	Fri 03/02/2017 11:35	0:00
wildix_t	Add contact	Thu 26/01/2017 20:36	0:00
wildix_t	Archive	Thu 26/01/2017 20:35	0:00
wildix_t	Delete	Thu 26/01/2017 20:35	0:00

test phonet

+

-

Total found: 2

Elena test

Name

ET

Elena test

Wildix

Mobile

+1122334455

Home

+3804821111

Home mobile

+3804821112

answer a call:
click the green icon

- To decline a call: click the “Hang up” (red) icon
- To forward a call without

All

+

-

Total found: 1

Elena test

Call: 3242

MR

Mario Rossi

3241

📞

📞

📞

📞

📞

📞

answering: click the arrow icon, select the contact to forward a call to (using search):

You can set up automatic call forwarding based on

user status (available, DND, away) and call type (internal, external, whitelist, blacklist). See chapter: [Function keys](#)

All

+

-

Total found: 1

Elena test

Call: 3242

MR

Mario Rossi

3241

📞

📞

📞

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📞

📞

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 – Hide / display call dialog window:

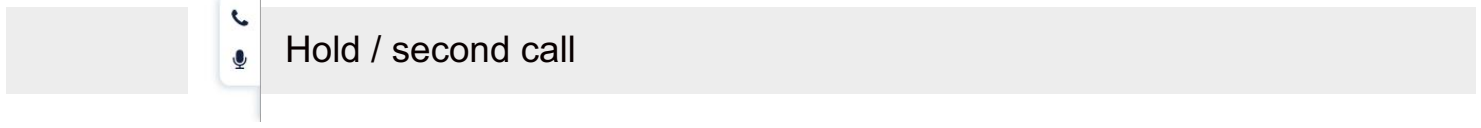
Chat

Video

Screen

Conference

- 10 – Mute / unmute your microphone



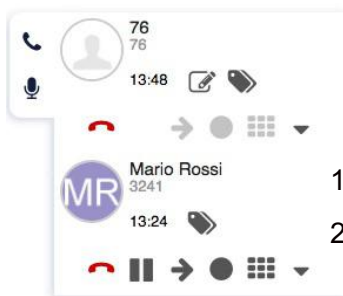
Click “Hold” icon during a call to put a call on hold / to resume a call. The second party hears music on hold (set up on the WMS side).

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.

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):



Call transfer

1. During a call, press the “Transfer” icon
2. Enter the contact name / number (user status and additional phone numbers are displayed).

3. Click “handset” icon for attended, “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 tabs.

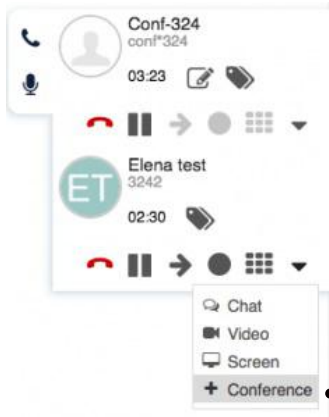
Video tutorial: <https://youtu.be/7A2Vqb9YjP0>



Conference call

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

1. When you have two calls, click “Other” -> “Conference” from one of the call dialogs to merge calls
2. 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.

Video call

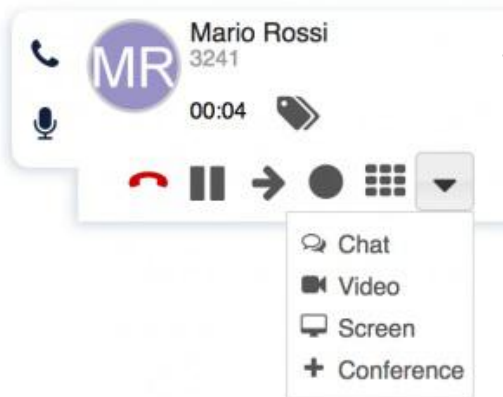
Video in Collaboration is fully supported on Chrome browser (WebRTC video).

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

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.

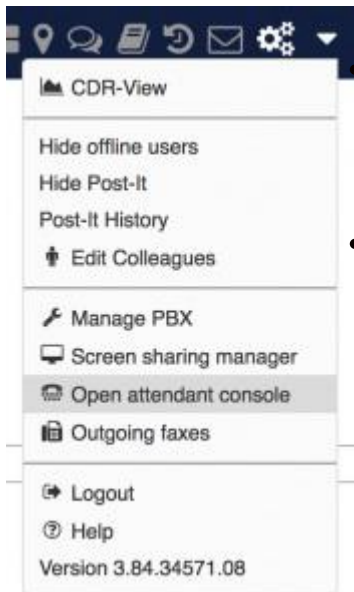
Call recordings are sent to user via email and can be accessed later on via CDR-View and Collaboration > [History](#).

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.

Open Attendant Console:

- Click “Other” from top menu and select “Attendant Console”:

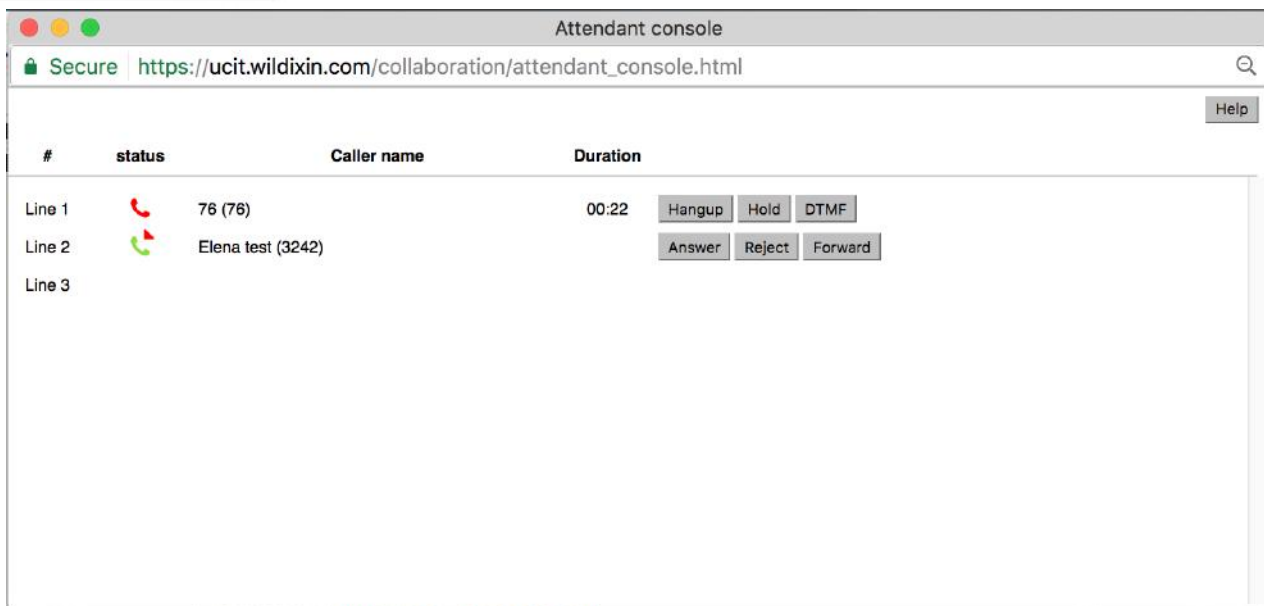


Set up a shortcut to open Attendant Console:

Collaboration Settings > Personal, “Open Attendant Console” (enter a combination of keys). By default 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

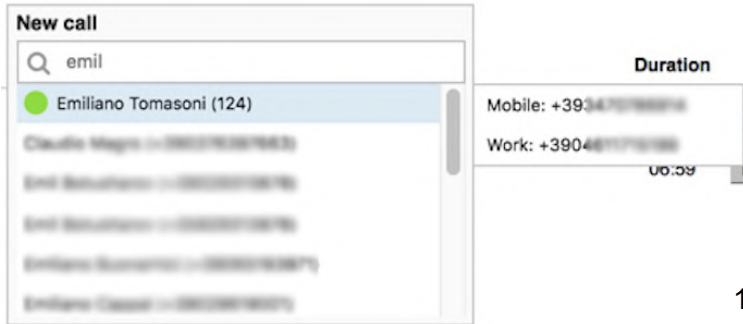
Hotkeys

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

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

1. Press “0” to put a call on hold
2. 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

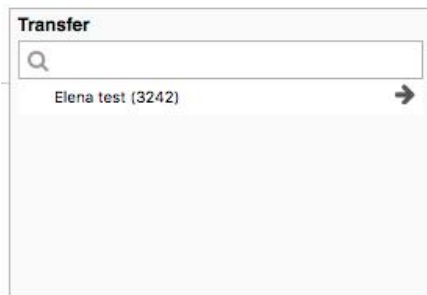
Hang up

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 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 Top menu:

Click “Fax” icon:



- 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 page and edit fax cover settings (See chapter: [Fax Server](#))
- Postpone delivery: tick the box and select the date to schedule fax sending

Click “Send” to send a fax

Send fax

Fax number

Elena Kornilova <+390461019978>

Fax file

Choose Files

WP4X02015Guidedutlisateur_(12).pdf

Faxcover

☒

Postpone delivery

Subject

To

AM

From

Elena Kornilova

Phone

Phone

Company

WILDIX SRL

Company

Fax

Notes

☐ Urgent
 ☐ For review
 ☐ Please comment
 ☐ Please reply
 ☐ Please forward

600

Send

Notes:

- fax delivery status is notified via email
- history of faxes can be consulted in Collaboration > History

From Search field:

- Enter the contact name / number 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 Top menu:

Click “SMS” icon:



- 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

Click “Send” to send SMS

From Search field:

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

From History:

- Right-click on an entry and select “Send SMS”

From Messaging:

- Click “SMS” icon in the lower right part of the screen of the chat session with user

Settings

Go to Wildix Collaboration > Settings.

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

Personal

- Password: edit your password for access to Collaboration
- 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](#))
- Show notifications in DND status: enable / disable chat / call popup notifications in DND status
- 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: <https://manuals.wildix.com/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>)

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
Activate class	<input checked="" type="checkbox"/>		
Call reject	<input type="checkbox"/>		
Call Forward Busy	<input type="checkbox"/> VOICEMAIL	<input type="checkbox"/> VOICEMAIL	<input type="checkbox"/> VOICEMAIL
Call Forward No Answer	<input type="checkbox"/> VOICEMAIL	<input type="checkbox"/> VOICEMAIL	<input type="checkbox"/> VOICEMAIL
Call Forward All	<input type="checkbox"/> VOICEMAIL	<input type="checkbox"/> VOICEMAIL	<input type="checkbox"/> VOICEMAIL
Call waiting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Call timeout	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enable mobility with timeout	<input checked="" type="checkbox"/> 6	<input type="checkbox"/>	<input checked="" type="checkbox"/> 10
Mobility confirmation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notify missed calls via email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Via SMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom ring	<input checked="" type="checkbox"/> Jingle	<input checked="" type="checkbox"/> silent	<input checked="" type="checkbox"/> Ring1

Save

(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”
- 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: check the box and enter the number or VOICEMAIL, to enable call forwarding when busy on the phone
- Call Forward No Answer: check the box and enter the number or VOICEMAIL, to enable call forwarding in case of no answer
- Call Forward All: check the box and enter the extension number or 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 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.

Read the guide: <https://manuals.wildix.com/function-keys-blf-keys-wp/>

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)

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
- 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
- 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)

Outlook integration

Available only on Windows after installing “Outlook integration” from Collaboration Settings > Extensions

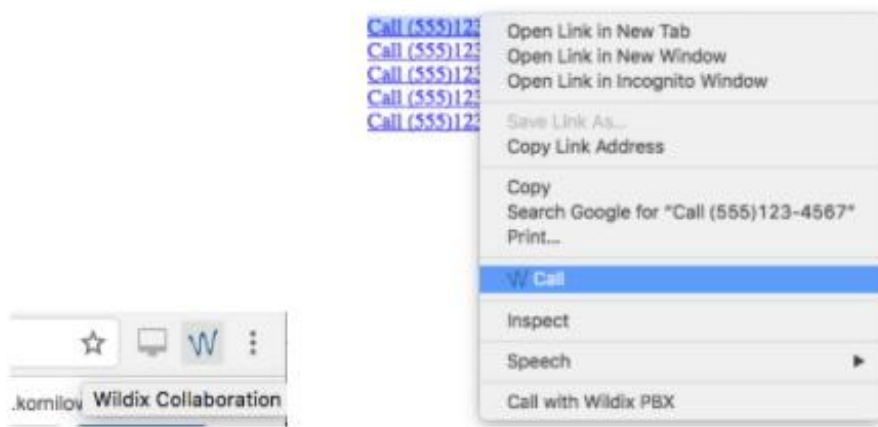
This menu allows you to enable Outlook calendar sync.

Read the guide: <https://manuals.wildix.com/outlook-integration/>

Extensions

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

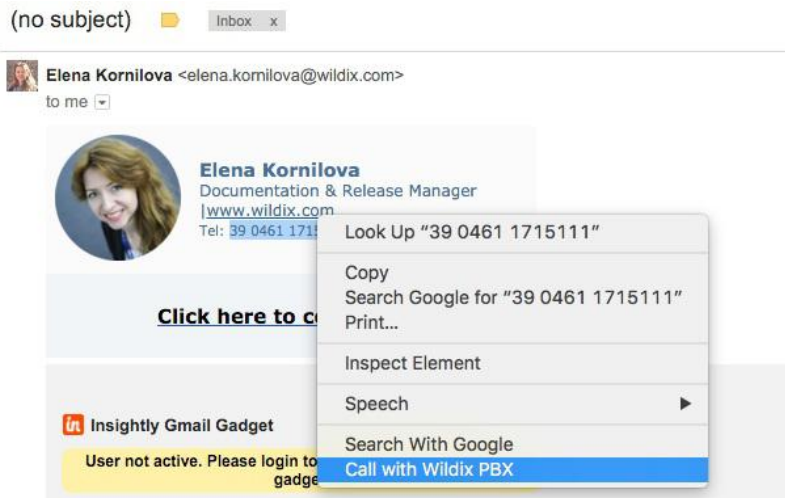
- **Web Phone** (available for browsers other than Chrome): plugin for making and receiving calls via Collaboration on web browsers other than Chrome (WebRTC Phone is built-in on Chrome)
- **Browser Extension** (Chrome browser only): adds quick access to Collaboration from Chrome toolbar (click “W” icon 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 possible to use the “W” icon to open Collaboration as a standalone application; download Chrome extension: <https://chrome.google.com/webstore/detail/wildix-collaboration-app/klaamdejgopombbjfphlebpjlmokgna>

- **Fax Printer**: this component allows sending faxes from Windows / Mac OS X applications
Read the guide: <https://manuals.wildix.com/fax-printer/>
- **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: <https://manuals.wildix.com/integration-utility-for-microsoft-windows/>
- **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: <https://manuals.wildix.com/outlook-integration/>
- **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 supported headsets via USB connector on Mac OS X / Windows
Headset compatibility matrix and Wildix headsets: <https://manuals.wildix.com/headsets/> 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)

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 “tick” icon (Save):

The screenshot shows the contact management interface. On the left, a search bar contains 'test phonet' and a dropdown arrow. Below it, a list of search results shows 'Mario Rossi' with 'Name' highlighted. On the right, the contact form is displayed with fields for Name, Organization, Avatar (showing 'data/images/default_avatar.png'), Phonebook (set to 'test phonebook'), and Title. A 'tick' icon in a box is visible in the top right corner of the form area.

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:

Name

Organization

data/images/default_avatar.png

Phonebook: test

Title

Extension

Work

Mobile

Home

Home mobile

Main: +38067...

Fax

Call back 067 +38067...

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

+3912345678

Web (1)

Recents

Call: +3912345678

SMS: +3912345678

Fax: +3912345678

Add contact

Search "+3912345678" in "Google"

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

To delete a contact:

1. Go to Collaboration > Phonebook
2. Find the contact using Search

Call	Date	Tags	Duration
Georgij C	Today 13:10		0:52
0003806	Today 13:08		0:00
76	Today 13:04		0:00
76	Today 13:04		0:00
324	Today 13:03		0:00
Elena Kc	Today 13:03		0:00
324	Today 13:03		0:00
324	Today 13:03		0:00

Call the mobile

Send fax

Send SMS

Tags

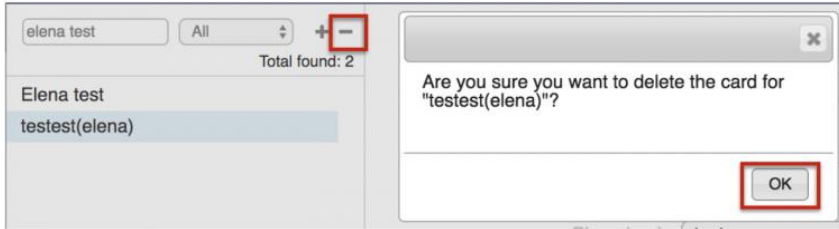
Add contact

Archive

Delete

3. Click “-” in the

upper left section to delete the contact and click “OK” to confirm (otherwise click “x” to close the window)

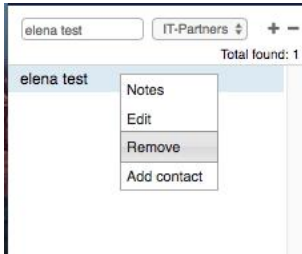


Otherwise right-click on a contact and select "Remove":

To edit a contact:

Go to Collaboration > Phonebook

1. Find the contact using Search
2. Click the pencil icon (Edit) to edit the contact
3. Edit the fields
4. Click the tick icon (Save) to save the changes



elena test



testtest(elena)



testtest(elena)

Organization

data/images/default_avatar.png



Personal phonebook

Go to Collaboration > Phonebooks

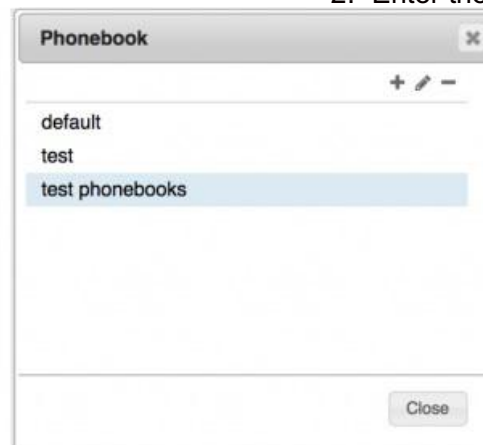
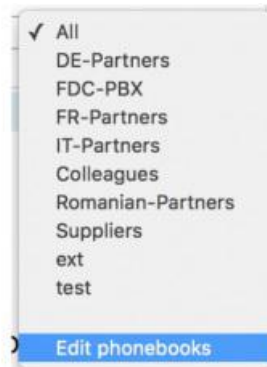
Click on "All" in the upper left section, then click on "Edit phonebooks":

Add a personal phonebook:

1. Click "+"
2. Enter the name of the phonebook
3. Now you can proceed with adding contacts

Delete a personal phonebook:

1. Select a phonebook

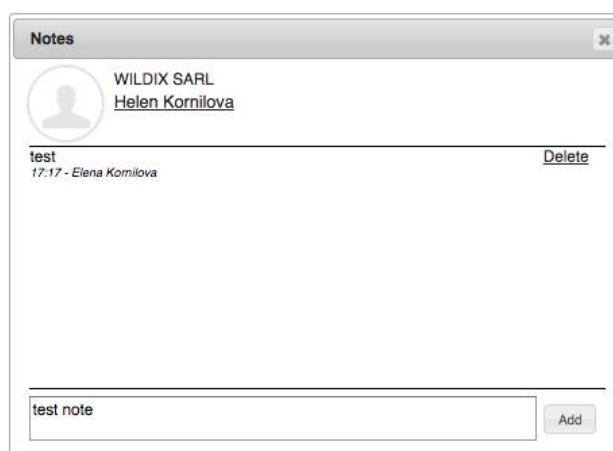
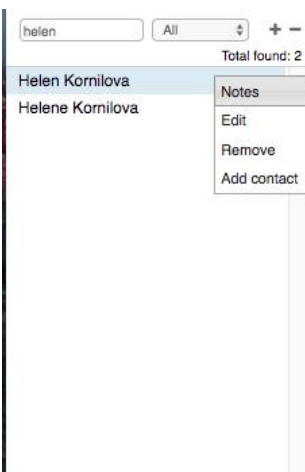
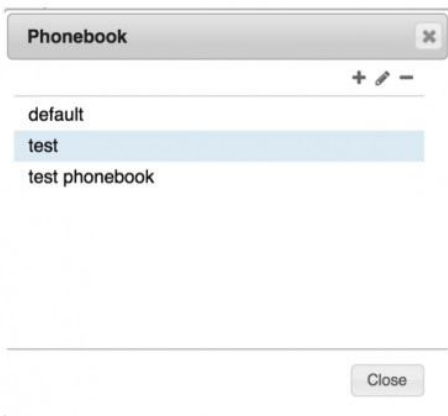
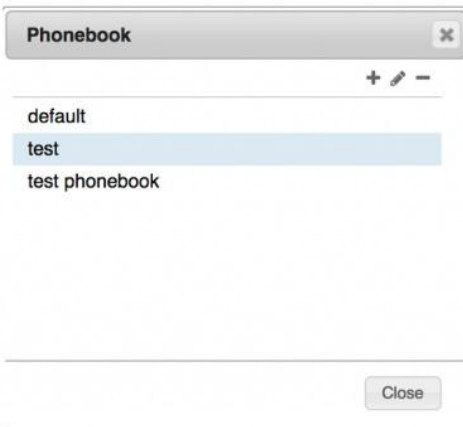
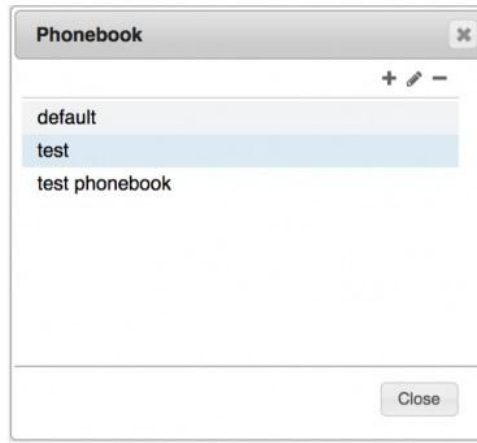


2. Click "-"
3. Click "OK" to confirm (otherwise click x to close the window)

Edit the name of the personal phonebook:

1. Select a phonebook
2. Click the pencil icon
3. Enter the new name

4. Click "Save"



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

Notes cannot be added for colleagues.

Add / display notes added to contact

During a call:

- Click "Notes" icon

From Phonebook:

- Right-click on a contact from the left section of the screen and select "Notes"

"Delete" option is available only for notes added by you.

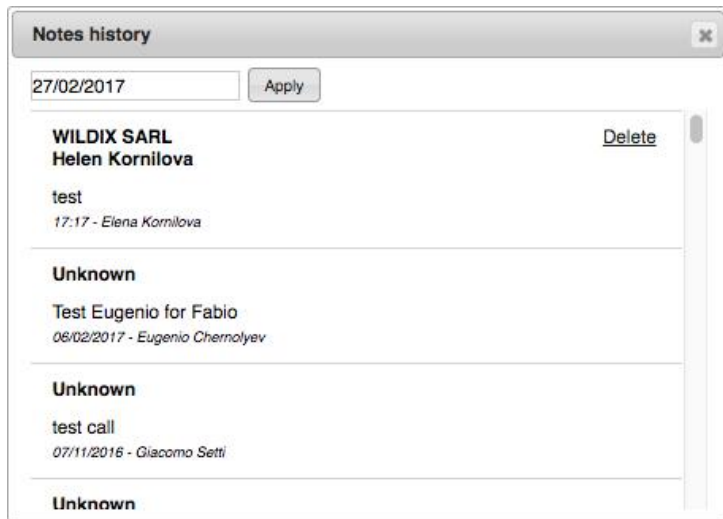
View history of notes added by users of the system:

- 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:

								• Filter by
emiliano	Incoming ▾	18/01/2017	Notes	CDR-View	Date	Tags	Duration	
☎	Emiliano Tomasoni (124)				Fri 13/01/2017 20:04		0:00	
☎	Emiliano Tomasoni (124)				Tue 03/01/2017 10:02		3:36	
☎	Emiliano Tomasoni (124)				Fri 30/12/2016 18:37		5:23	
☎	Emiliano Tomasoni (124)				Thu 29/12/2016 10:33		3:14	
☎	Emiliano Tomasoni (124)				Wed 28/12/2016 17:21		3:10	
☎	Emiliano Tomasoni (124)				Wed 28/12/2016 17:20		0:00	

incoming / outgoing / missed calls / fax in / fax out / archived events:

	19/02/2017	Notes	CDR-View	Date	Tags	Duration
☎ Emiliano Ton				Fri 17/02/2017 18:34		4:04
☎ 324				Fri 17/02/2017 15:53		0:00
☎ Elena Kornik				Fri 17/02/2017 15:53		0:00
☎ Mario Rossi				Fri 17/02/2017 15:46		2:06
☎ Mario Rossi (3241)				Fri 17/02/2017 15:46		0:00
☎ Mario Rossi (3241)				Fri 17/02/2017 15:44		1:47
☎ Mario Rossi (3241)				Fri 17/02/2017 15:40		3:11
☎ Mario Rossi (3241)				Fri 17/02/2017 15:40		0:04
☎ 76				Fri 17/02/2017 15:37		0:00
☎ 76				Fri 17/02/2017 15:30		0:00
☎ Mario Rossi (3241)				Fri 17/02/2017 15:27		0:00

events that took place up to the date selected are displayed):

	Missed	18/01/2017	Notes	CDR-View	Date	Tags	Duration
☎ Kevin Boileux (374)		<div> <div>Jan</div> <div>2017</div> </div> <div> <div>Su</div> <div>Mo</div> <div>Tu</div> <div>We</div> <div>Th</div> <div>Fr</div> <div>Sa</div> </div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> </div> <div> <div>8</div> <div>9</div> <div>10</div> <div>11</div> <div>12</div> <div>13</div> <div>14</div> </div> <div> <div>15</div> <div>16</div> <div>17</div> <div>18</div> <div>19</div> <div>20</div> <div>21</div> </div> <div> <div>22</div> <div>23</div> <div>24</div> <div>25</div> <div>26</div> <div>27</div> <div>28</div> </div> <div> <div>29</div> <div>30</div> <div>31</div> </div>					




	Tue 17/01/2017 17:54		0:00		☎ Kevin Boileux (374)					Tue 17/01/2017 17:53		0:00
☎ Kevin Boileux (374)					Tue 17/01/2017 17:52		0:00					
☎ Emiliano Tomasoni (124)					Fri 13/01/2017 20:04		0:00					
☎ SAM JOHN (919087584555)					Thu 12/01/2017 21:10		0:00					
☎ Maarten Kronenburg (363)					Thu 12/01/2017 18:17		0:00					
☎ SAM JOHN (919087584555)					Thu 12/01/2017 15:10		0:00					
☎ SAM JOHN (919087584555)					Thu 12/01/2017 13:34		0:00					
☎ SAM JOHN (919087584555)					Thu 12/01/2017 13:25		0:00					

detailed analysis of call activity of users and groups, click “CDR-View” (read the guide <https://manuals.wildix.com/cdr-view-user-guide/>).

Delete / archive events





To archive an event:

- Right-click on an entry and select “Archived”

<div> <input type="text"/> <div> <input checked="" type="checkbox"/> All <input type="checkbox"/> Incoming <input type="checkbox"/> Outgoing <input type="checkbox"/> Missed <input type="checkbox"/> Fax in <input type="checkbox"/> Fax out <input checked="" type="checkbox"/> Archived </div> </div> <div> <div>21/02/2017</div> <div>Notes</div> <div>CDR-View</div> </div>		Date	Tags	Duration
	Mario Rossi		Today 19:22	0:06
	Nicolay Subt		Today 18:57	2:50
	Dmitriy Kom		Today 16:57	1:56
	Mario Rossi		Today 16:28	0:00
	Elena Fedorova (389)		Today 13:26	1:06

archived event:

- ### 1. Filter events by “Archived”

	Archived 	21/02/2017	Notes	CDR-View	Date	Tags	Duration
 Mario Rossi (3241)				 Today 19:23			0:11
 Mario Rossi (3241)				Fri 17/02/2017 15:46			2:06

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



To delete an event:

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:

				Call		
	Fax in	21/02/2017	Notes	CDR-View	Date	Tags
	Elena Kornilova (324)				Wed 19/08/2015 18:47	0:20
	Faxing from Elena Kornilova (324)				Wed 19/08/2015 18:46	1:21

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

				At the		
	All	21/02/2017	Notes	CDR-View	Date	Tags
	Mario Rossi (3241)				Today 19:22	0:06
	Nicolay Subbota (379)				Today 18:57	2:50
	Dmitriy Komysenko (310)				Today 16:57	1:56

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 enabled and added on WMS side (WMS Settings > PBX > CDR, “CDR Settings”, enter tags separated by commas into “Tags” field). Once added, “Tags” column is displayed in Collaboration > History.

It is possible to set tags via WMS > Dialplan (“Set” 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
Dimitri Osler	03/07/2015		0:12
Elena Kornilova	02/07/2015		0:00
elena	02/07/2015		0:00
Mario Rossi	02/07/2015		0:08
Mario Rossi	02/07/2015		0:12

Set tags during a call:

1. Click the



	Date	Tags	Duration
Dimitri Osler	03/07/2015		12
Elena Kornilova	02/07/2015		00
elena	02/07/2015		00
Mario Rossi	02/07/2015		0:08

“Tags” icon

2. Tick off the tags that you wish to set for this call:

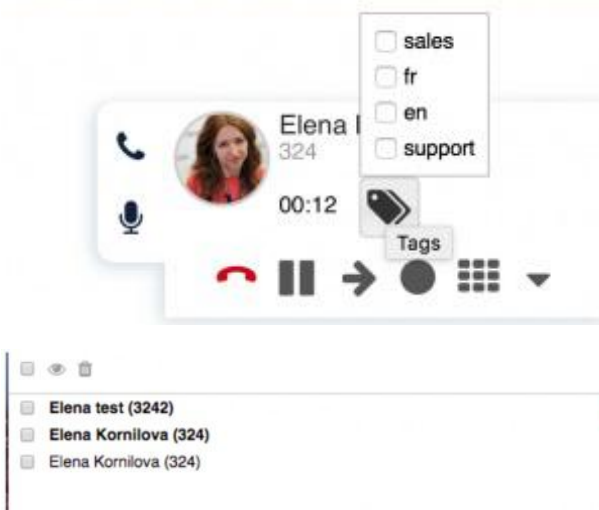
Voicemails

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

Listen to Voicemails:

Click the download icon

Mark Voicemail as read:

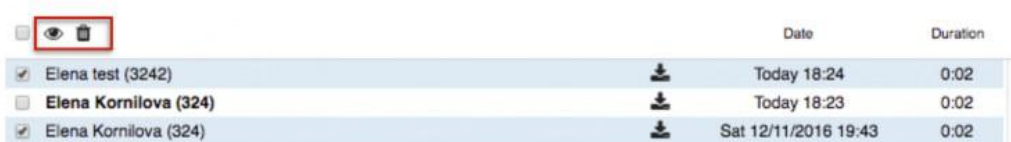


	Date	Duration
Elena test (3242)	Today 18:24	0:02
Elena Kornilova (324)	Today 18:23	0:02
Elena Kornilova (324)	Sat 12/11/2016 19:43	0:02

1. Select one or multiple Voicemails
2. Click “Mark as read” icon in the upper part of the screen

Delete Voicemails:

1. Select one or multiple Voicemails
2. Click “Remove” icon in the upper part of the screen



	Date	Duration
Elena test (3242)	Today 18:24	0:02
Elena Kornilova (324)	Today 18:23	0:02
Elena Kornilova (324)	Sat 12/11/2016 19:43	0:02