WILDIX-POWERED COMMUNICATIONS

Collaboration 7

Web User Guide

Prepared for Cleod9 Voice customers

Based on the October 2026 Wildix documentation

YOUR CLEOD9 VOICE RESOURCE

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Original technical content: Wildix

Collaboration 7 Web User Guide

This User Guide explains how to access and use Collaboration 7 and describes the basic features: how to manage calls, create conversations, etc.
Other Collaboration 7 documentation: https://wildix.atlassian.net/wiki/x/DwAFRg
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Introduction

Collaboration 7 is the unified communications platform, designed for efficient business communication, to engage teams, prospects and customers.

Collaboration 7 focuses on:

- Efficient team collaboration
- Productivity and response time increase
- Real–time customer communications
- Customer retention and satisfaction

Prerequisites

WMS version

- WMS 7.01 or higher

Supported browser

- Chrome
- Microsoft Edge
- Chromium-based browsers (e.g. Brave, Opera)

Mobile apps

- **Android** 9 or higher
- **iOS** 13.3 or higher

Chrome extension

- Install extension from here: https://chromewebstore.google.com/detail/collaboration-7/lppmjfhhdefbmincgpkgnlbfgnfnloek

Notes:

- Access to the web version and mobile apps of Collaboration 7 is available starting from UC-Essential license

⚠ Note: Please, update the native app to the latest version for proper functionality.

Collaboration 7 native application:

- EXE file for Windows 10, 11:
  - https://files.wildix.com/integrations/win/collaboration7/Collaboration7.exe
- MSI file for Windows 10, 11:
  - https://files.wildix.com/integrations/win/collaboration7/Collaboration7.msi
- For MacOS (10.15 and higher):
  - https://files.wildix.com/integrations/osx/collaboration7/Collaboration7.pkg

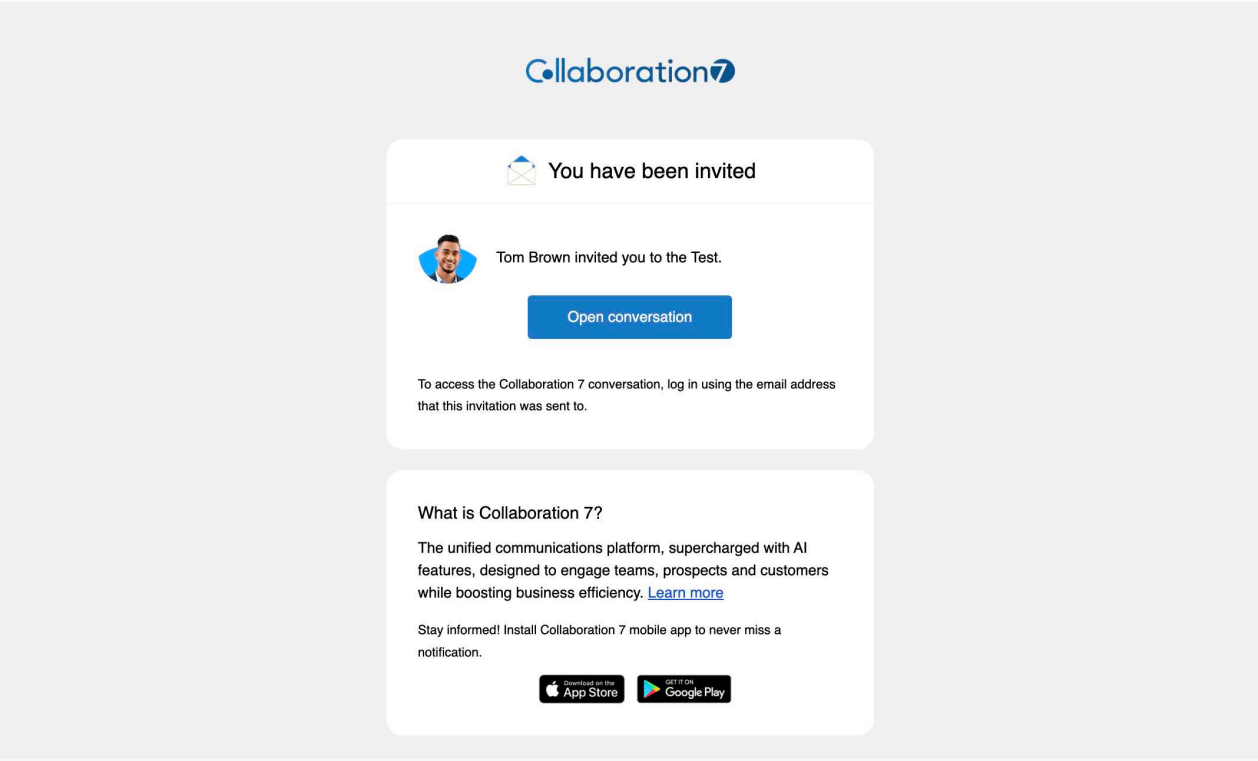
Getting started: first access demo video

Login

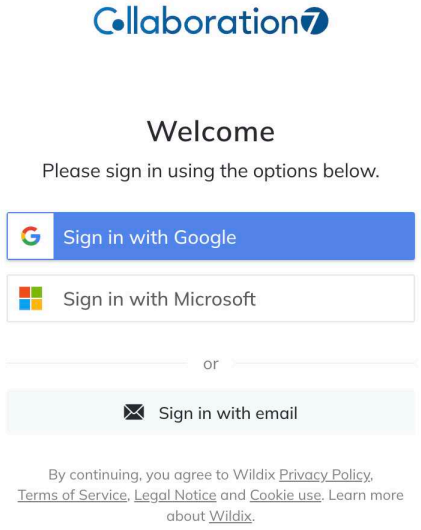
Users of the PBX receive an invitation via email with the link to join Collaboration 7 and download mobile apps. The invitation email should be sent by the PBX admin from WMS.

Follow the steps:

1. Click on the link in the email invitation to join Collaboration 7

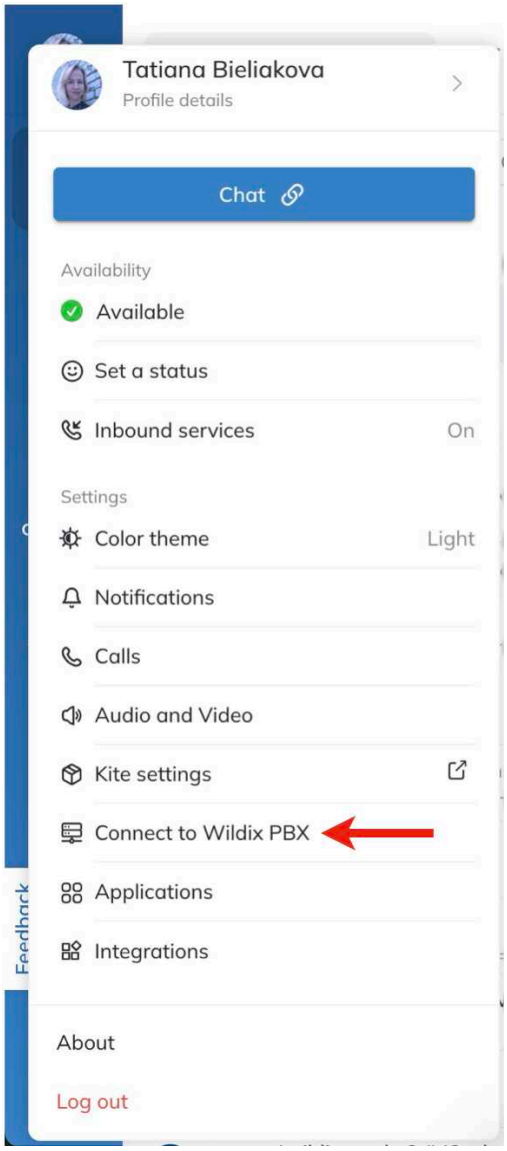


2. Log in using Google or Microsoft SSO or with email

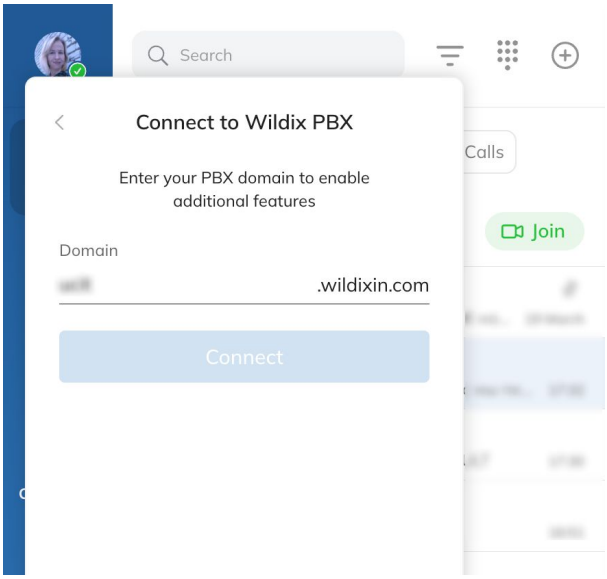


PBX users who joined Collaboration 7 via email invitation sent by the system administrator are automatically connected to the correct Wildix PBX. You can make sure you are connected to the Wildix PBX by following the steps below:

1. Click on your user picture from the upper left-hand part of the screen
2. Under *Settings*, click **Connect to Wildix PBX**

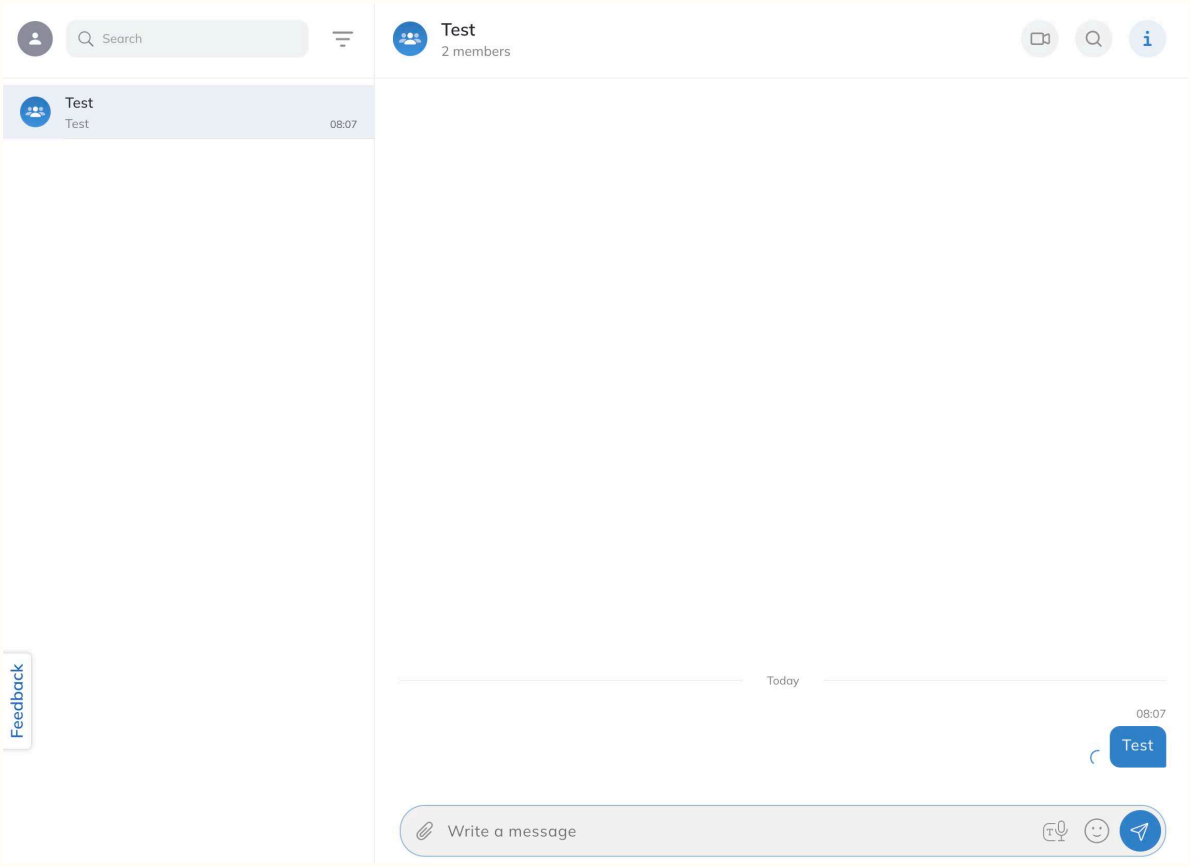


3. Make sure the Wildix PBX domain name is entered into the field *Domain*



Note: if you are not sure, what your Wildix PBX domain is, please check with your system administrator.

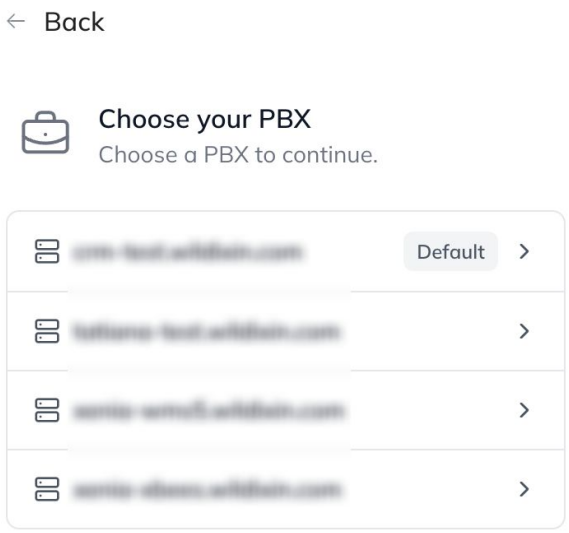
Note: If the user is not connected to PBX, the sidebar tabs will not be displayed. This is expected behavior (guest session mode).



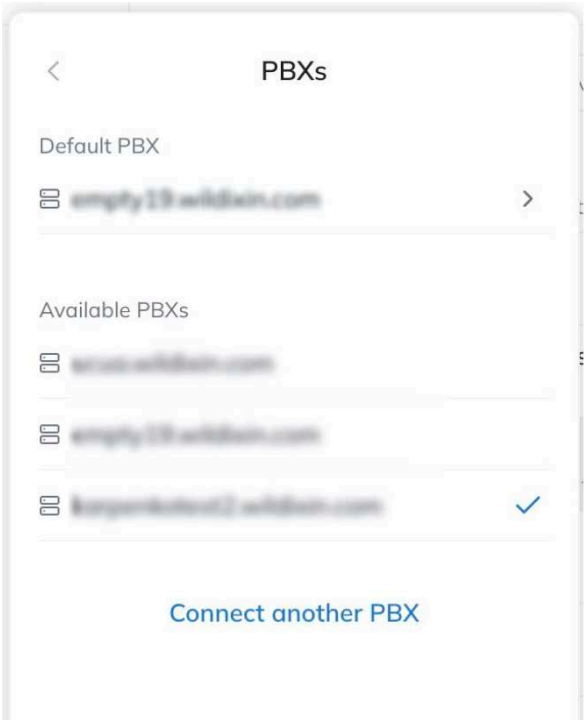
Multiple PBX management

Users belonging to multiple Wildix PBXs can manage them within a single account without logging out.

If your email is linked to multiple PBXs, the *Choose your PBX* screen appears after sign-in. Select your desired environment to load its specific chats and history:



To switch between PBXs when logged in, to to *Settings* -> Connect to Wildix PBX to see your *Available PBXs*. Tap any PBX in the list to switch; the app will perform a quick session reload to update your data.



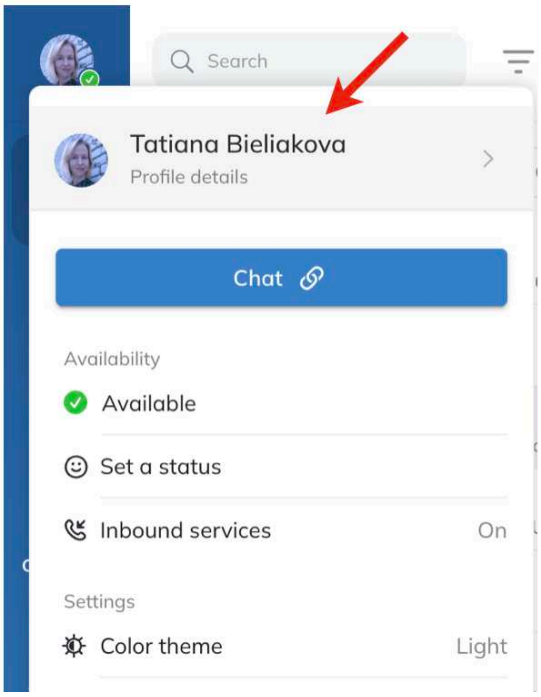
Note: Switching the active PBX on one device will automatically update your other connected devices within an hour. This feature is not available for guest/Kite sessions.

Settings

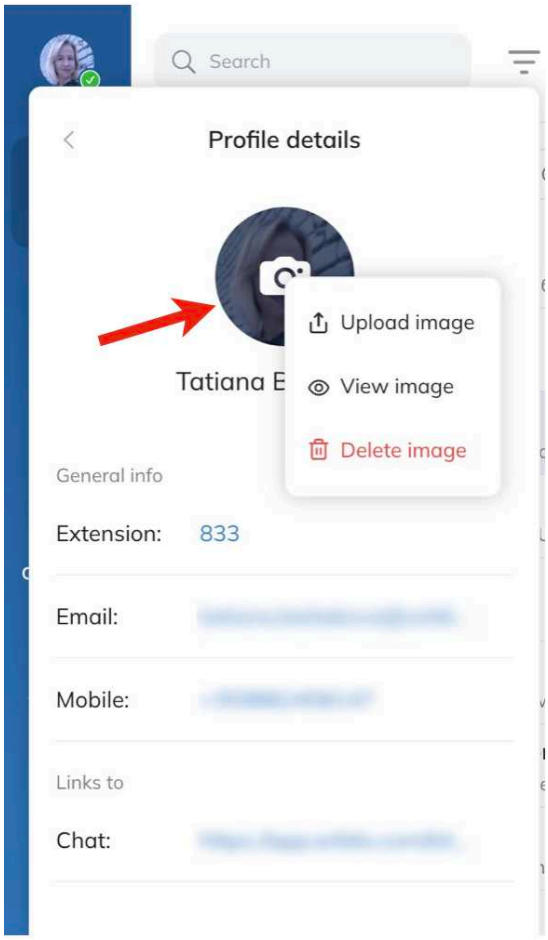
User picture

To set up/ change the picture:

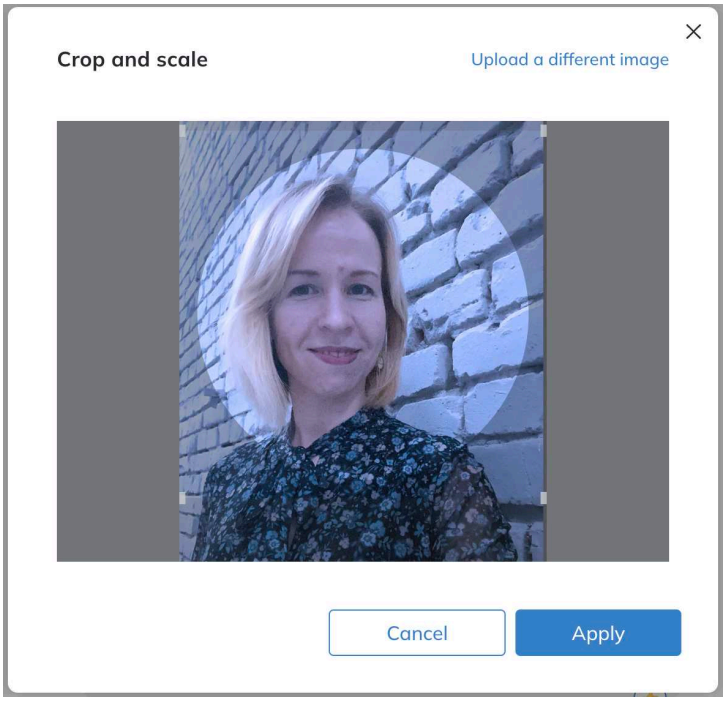
1. Click on your user picture in the upper left-hand part of the screen to open *Settings*
2. Click on your user picture to open profile information



3. Click **Upload image** and select a new picture



4. Crop and scale and click **Apply**



Language

Language is currently selected based on your Browser language.

> Note: professional translation is currently available in Italian, German, Spanish and French.

Time format

Collaboration 7 automatically detects your system's time format (12- or 24-hour) and regional date formats based on your browser or OS preferences. This ensures a consistent experience across the History and Voicemails tabs, as well as throughout the entire interface.

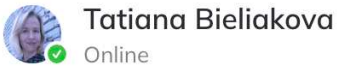
User status and status message

The following user presence statuses are available in Collaboration 7:

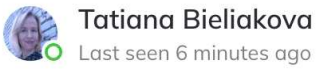
- Green: available
- Yellow: away
- Red: busy
- Blue: reachable by phone for users with an active device who are not connected to Collaboration 7

Presence status behavior

- **Online** (green circle) - displayed when the user has an open Collaboration tab (or enabled push notification subscription) and the last activity was within the last 30 minutes



- **Last seen <time> ago** (green outlined circle) - displayed when the user has an open Collaboration tab (or enabled push notification subscription) and the last activity was more than 30 minutes ago

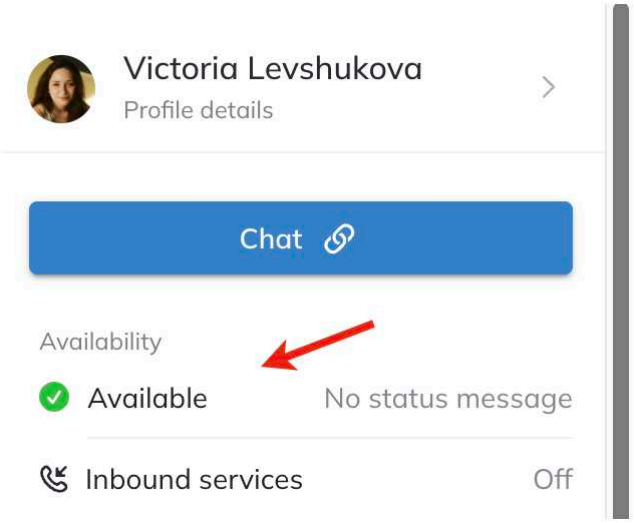


- **Offline** (grey circle) - displayed when the user does not have an open Collaboration tab and push notification subscription is disabled

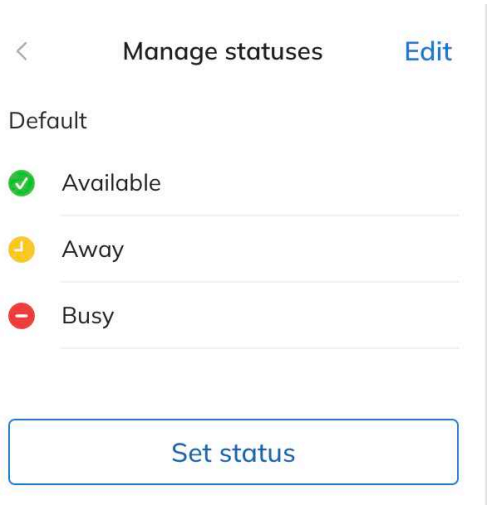


To change user status:

1. Click on your user picture in the upper left-hand part of the screen to open *Settings*
2. Under *Availability*, click on your current user status (e.g. Available)



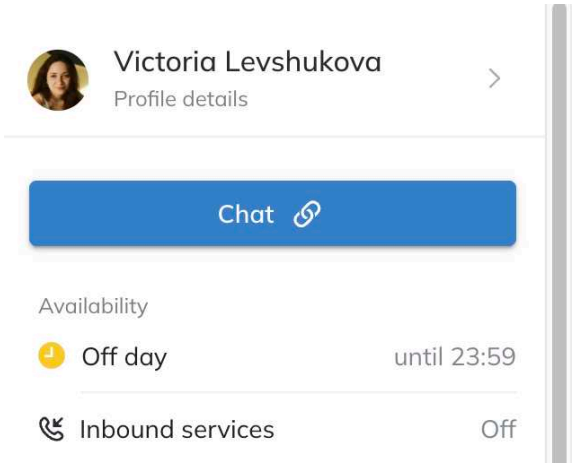
3. Select one of the default statuses



4. There is also a possibility to create your own status by clicking the **Set status** button. After that, a new window will open where you can:

- **Set status message** and select emoji
- Choose how long the status should remain active using the **Clear after** option
- **Save the status for future use** (optional)

5. To check the status message, click on your user picture in the upper left-hand part of the screen to open *Settings.* Under *Availability,* check the message



Notes:

- The status message should be no longer than 100 characters
- When busy in a conference, user status automatically changes to the default one (e.g. “in conference | until 14:00”)

In case of a Google calendar integration, user status is synced with the Calendar events.
Note: If there is a confirmed Google Calendar event that is inside another longer event: after participating in an event that is inside another longer event, user status changes to this corresponding longer event.
Limitations:

- The logic applies to standard and Out of office events. Task and Appointment slots don’t support the updates.
- Custom user presence and status are not restored after the end of the event.
- Custom user presence and status are not restored after the end of the conference started manually.
- In case of changing response to the event invitation or deleting an event that is already in progress, the status is not updated.

You can update a colleague’s presence status in the following ways:

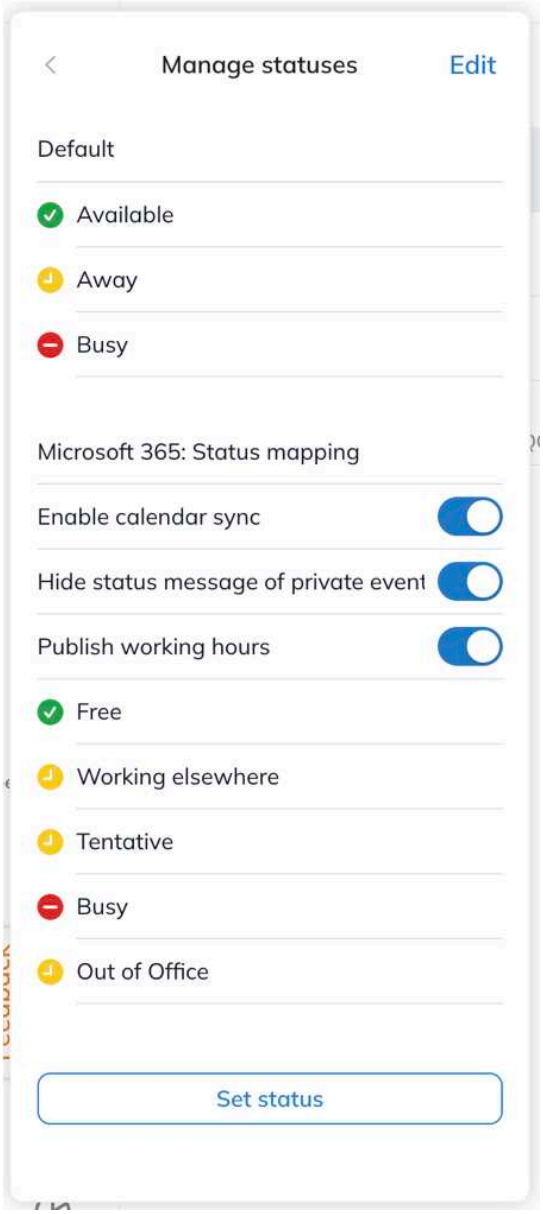
- Inbox tab: right-click or hover over the conversation with a colleague, click the More icon, and select Set presence status
- Favorites / Contacts tab: hover over a contact, click the Presence status icon, and set the presence status

⚠ Note: To be able to change colleagues' presence statuses, user should have the ACL permission Can Modify presence

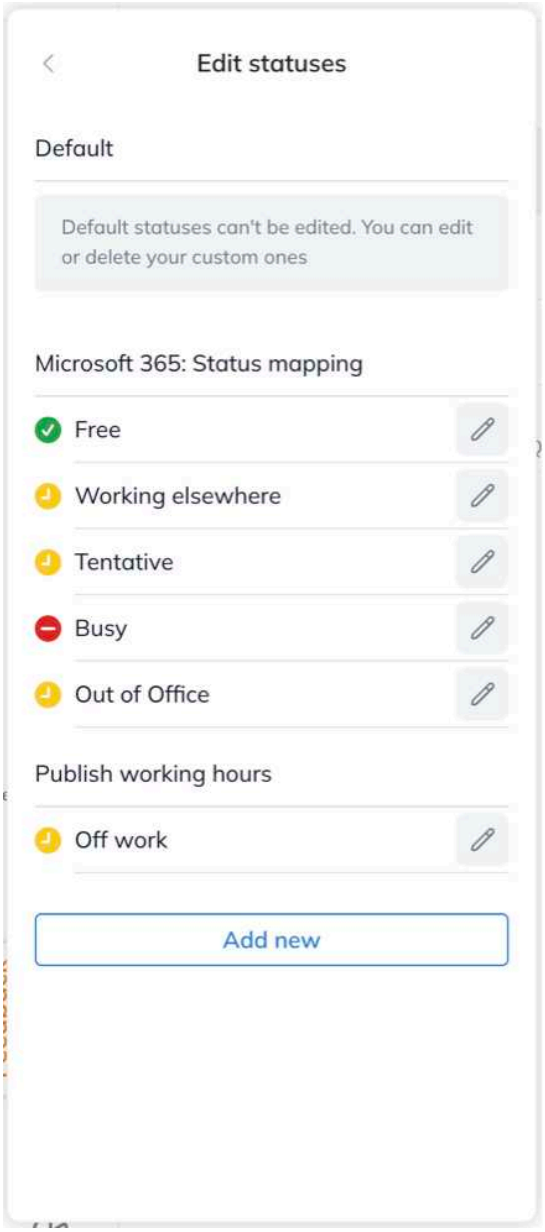
Microsoft 365 status mapping

In case of Microsoft 365 integration, you can configure status mapping and sync your Wildix status with your Microsoft Calendar events. This keeps your availability accurate.

1. In the *Microsoft 365: Status mapping* section, turn the toggles on or off as needed:
   - Enable calendar sync
   - Hide status message of private event
   - Publish working hours



2. To change the mapping, click **Edit** at the top and then click the pencil icon next to the calendar status (Free, Working elsewhere, Tentative, Busy, Out of Office, Off work):



3. Choose the status type (Available, Away or Busy). If you want a status message, select **Set status message** and type it in. Then click **Set**:



Notes:

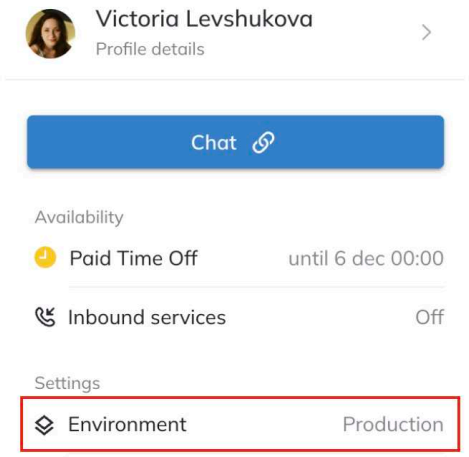
- The settings are only shown if the Microsoft 365 calendar integration is turned on.
- Changes usually sync within a few seconds.
- If you use both Google and Microsoft calendars, your status follows the event that started most recently.

Environment

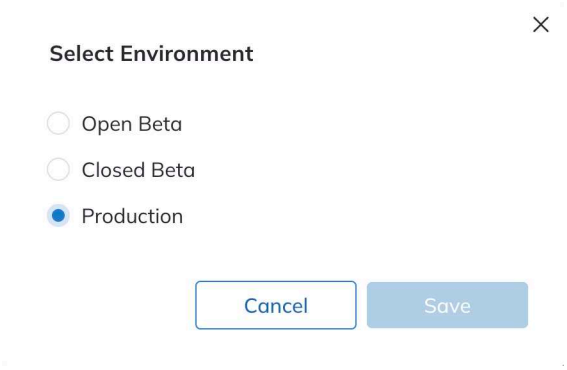
There is possibility to switch between different environments, allowing you to test upcoming features before they are released to production. In the **Environment** section you can choose between *Production*, *Open Beta*, and (for internal users) *Closed Beta*.

To select environment:

1. Click on your user picture in the upper left-hand part of the screen to open *Settings*
2. Under *Settings*, select *Environment*



3. After that, a new window will open, where you can choose one of the options:

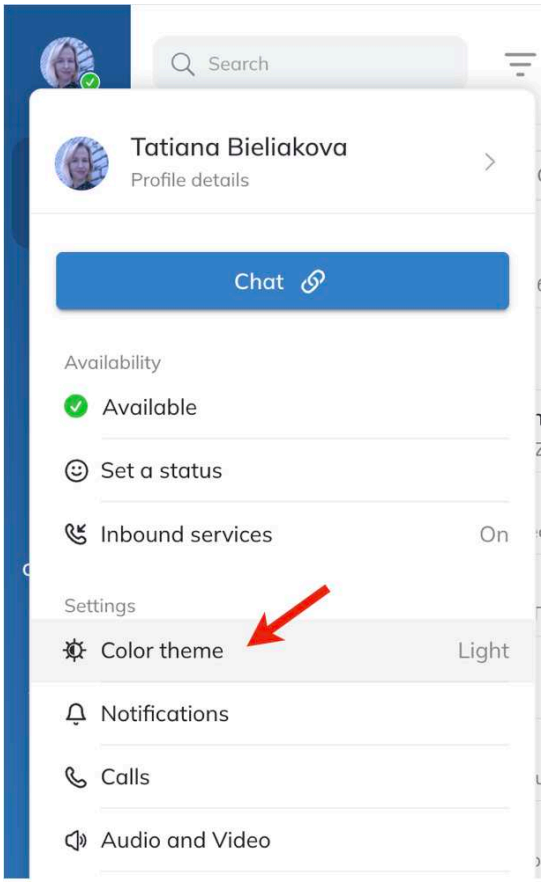


4. Click **Save**

Color theme

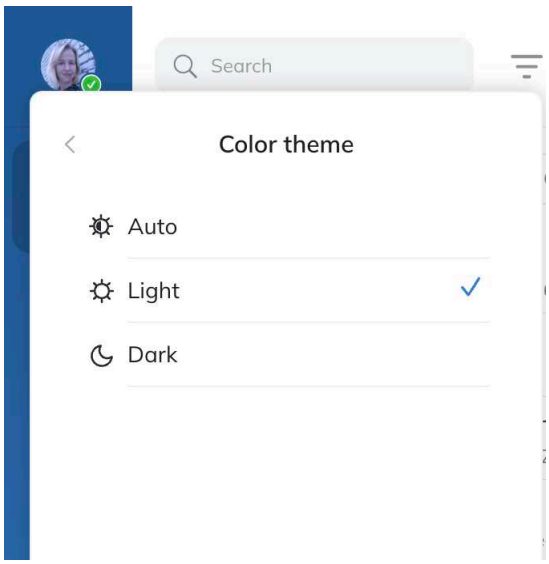
To change color theme:

1. Click on your user picture in the upper left-hand part of the screen to open *Settings*
2. Under *Settings*, click **Color theme**



3. Choose the preferred color theme:

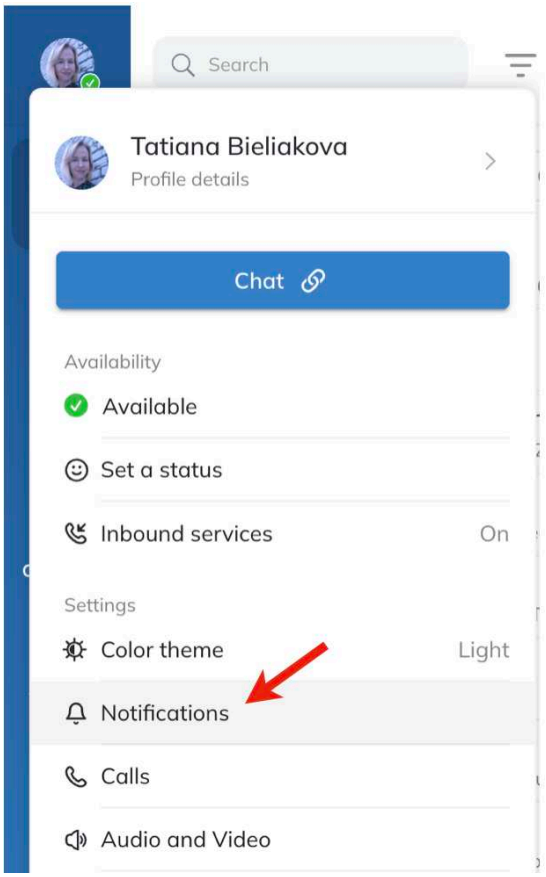
- Auto
- Light
- Dark



Notifications

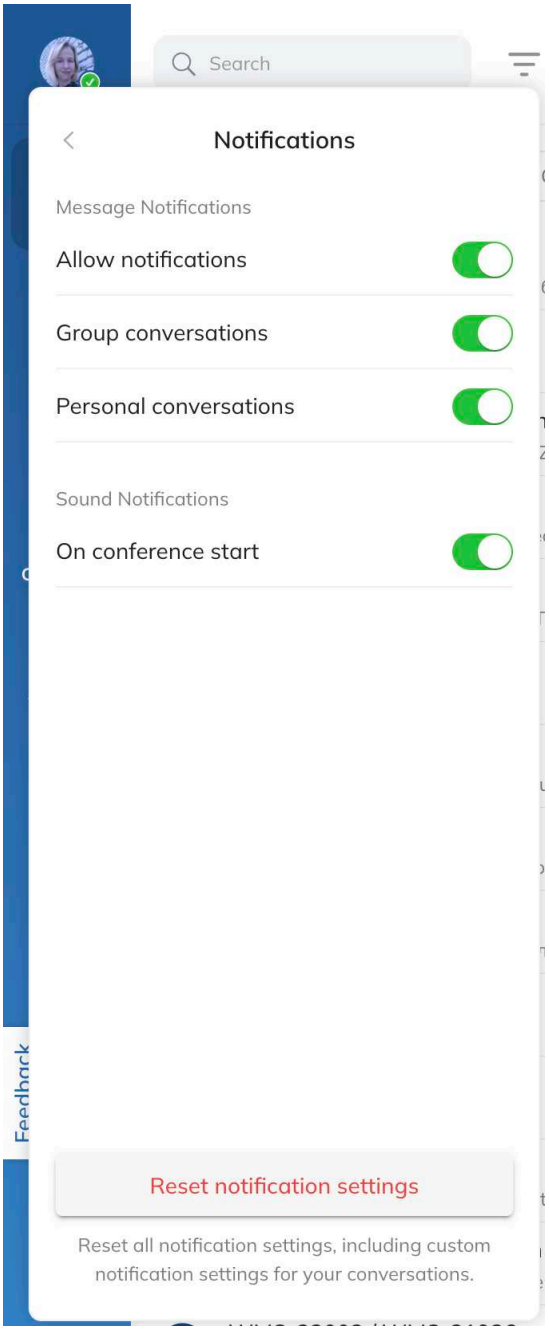
To enable/ change notifications settings:

1. Click on your user picture in the upper left-hand part of the screen to open *Settings*
2. Under *Settings*, click **Notifications**



3. Enable Notifications:

- Here you can enable notifications in personal and group conversations. It is recommended to enable all of them, in case you decide to mute a particular conversation, you can do it from the settings of this particular conversation. Note, that Web and Mobile notifications are managed separately and there is no sync between them, to enable notifications on Mobile, consult Collaboration 7 Mobile User Guide.
  You can also manage notifications played when a conference starts. Sound notification on the conference start is not played if user is in a conference, a call, or has Busy/ Away status.



Note:

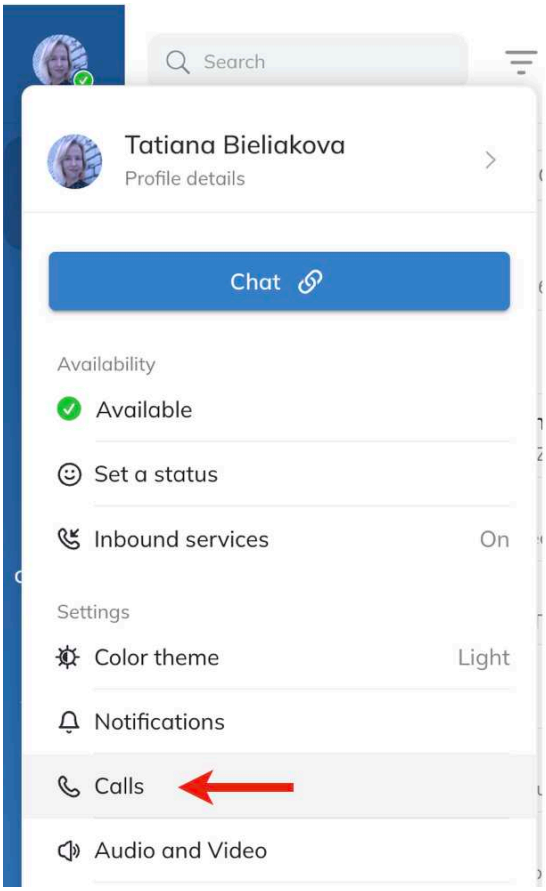
- Audio notifications about new chats are currently not available.
- Sound notifications are enabled by default.

Call settings

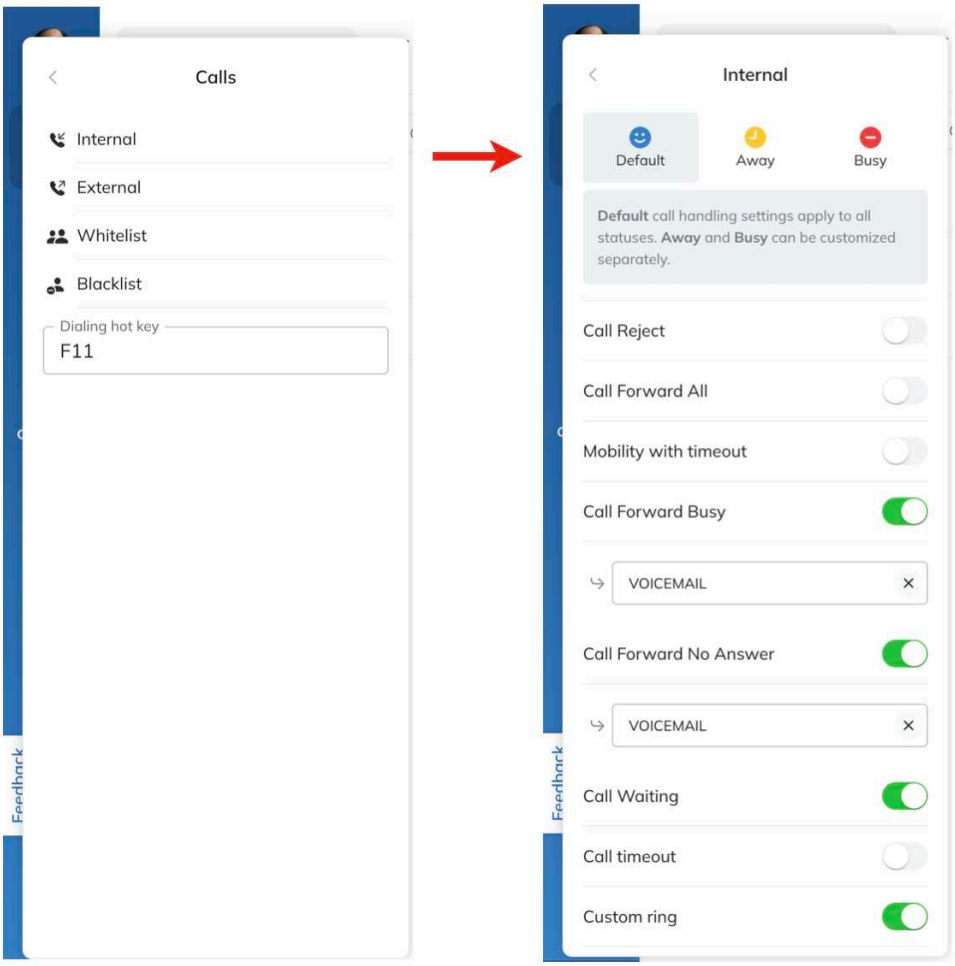
Call forwarding

To enable/ change call forwarding settings:

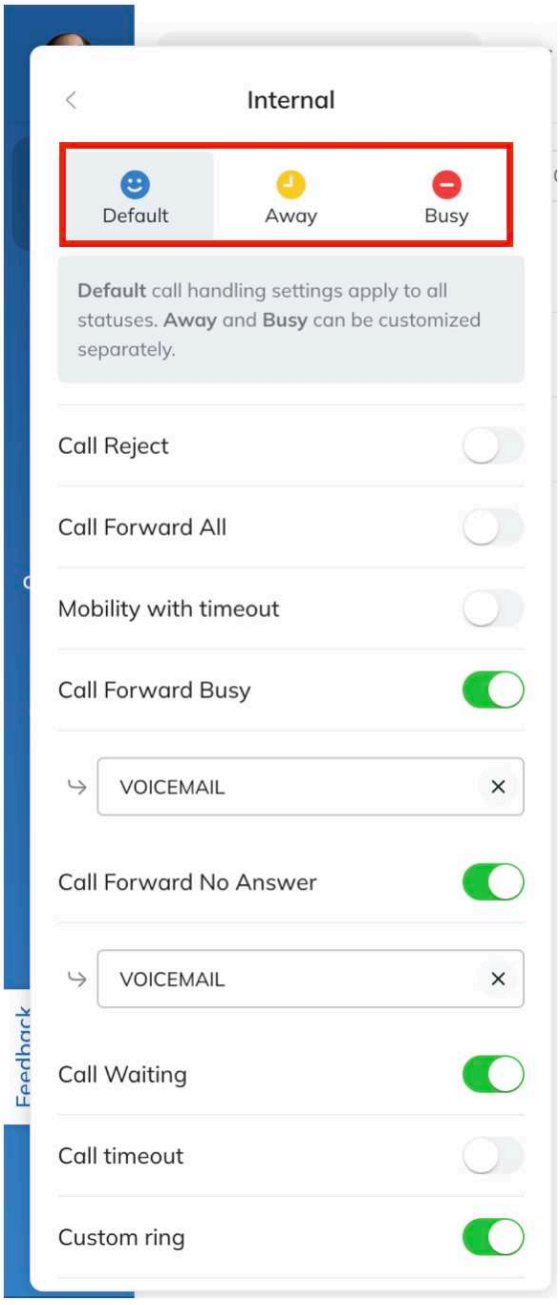
1. Click on your user picture in the upper left-hand part of the screen to open *Settings*
2. Under *Settings*, click **Calls**



3. Set up call forwarding rules for every Call class:

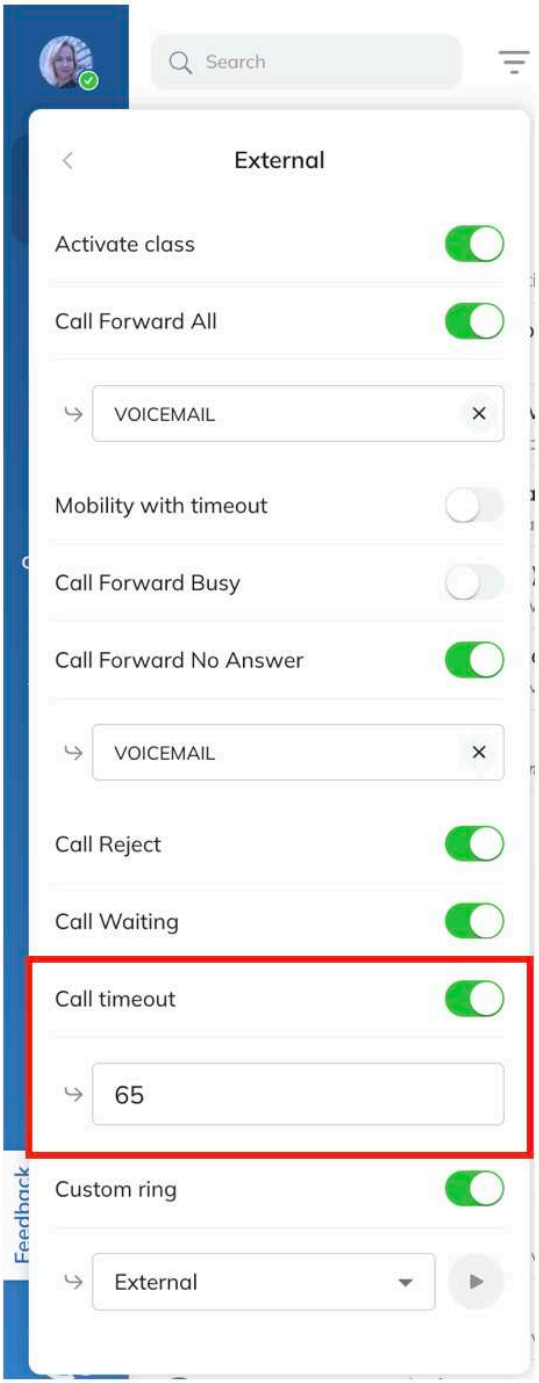


You can set call forwarding rules for all statuses on the *Default* tab or customize call forwarding rules for Away or Busy statuses on the corresponding tabs:



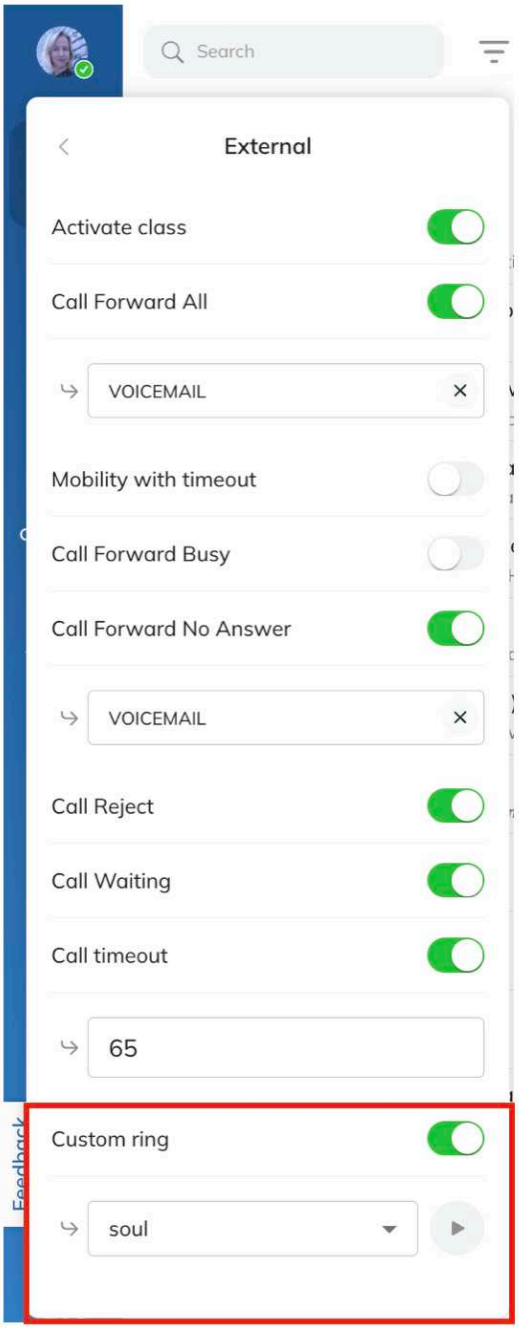
Call timeout

On the Call class tab you can also set **Call timeout.** When this option is enabled, the incoming call is terminated if there is no answer within a specified timeout.



Custom ring

The option allows to select the ringtone for WorkForce, WelcomeConsole, WP 5 phones and Collaboration 7.

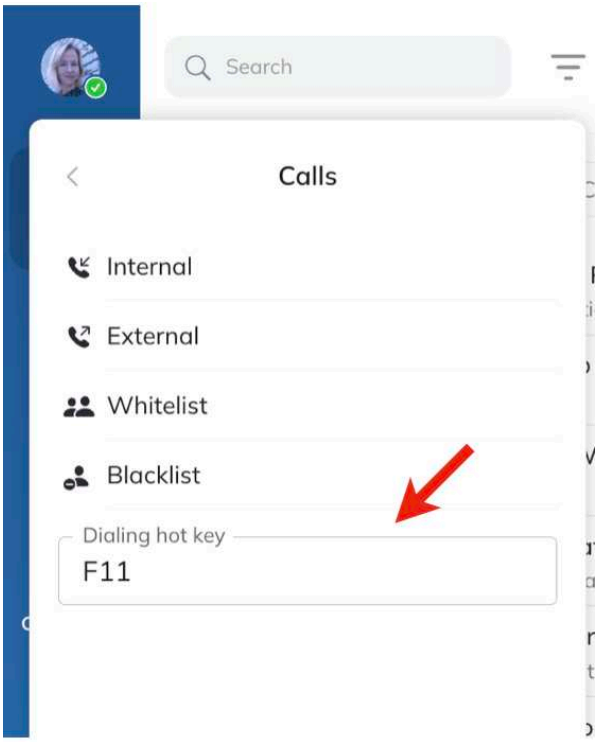


Dialing hot key

The feature allows to set up a shortcut for click2call. By default, Dialing hot key is F11.

> Note: Dialing hot key is available from WIService v. 3.14.9.

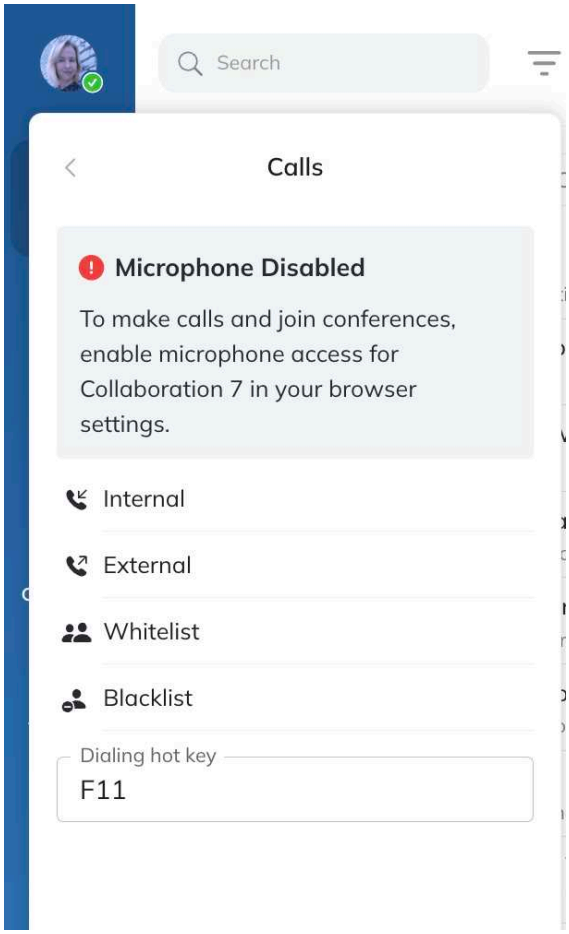
To set a custom hot key, enter the necessary value in the **Dialing hot key** field:



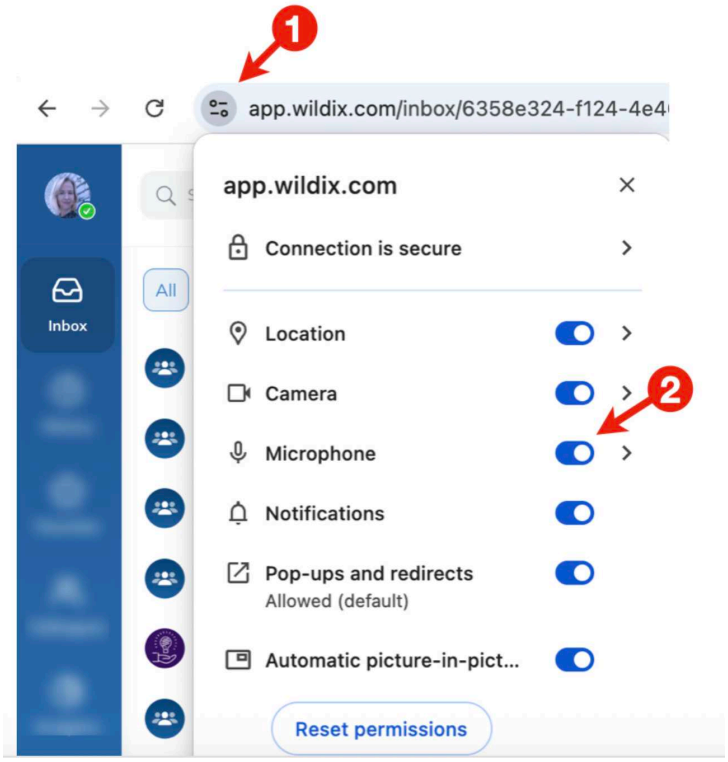
To make a call: select a phone number and press the key combination. The call is placed via the active advice chosen in Collaboration 7.

Microphone disabled notification

In case microphone access for x-bees is disabled in your browser, there is a relevant notification on the *Calls* tab in *Settings*:



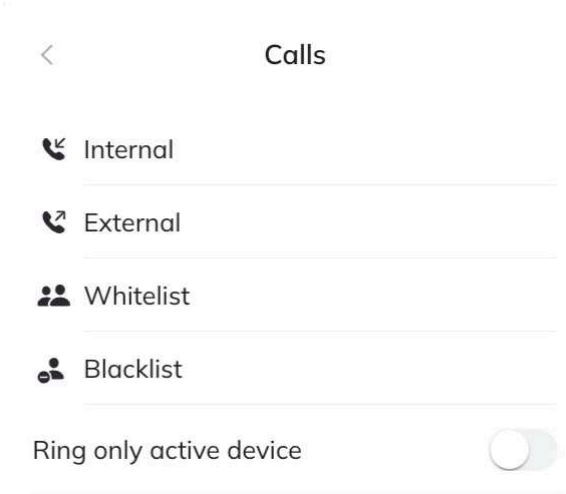
To enable microphone access, open browser settings and make sure the toggle in front of the Microphone toggle is enabled:



Ring only active device feature

This feature ensures that incoming calls ring only on the currently selected active device. All other registered devices will remain muted. To enable:

1. Under *Settings*, click **Calls**
2. Enable the toggle **Ring only active device**

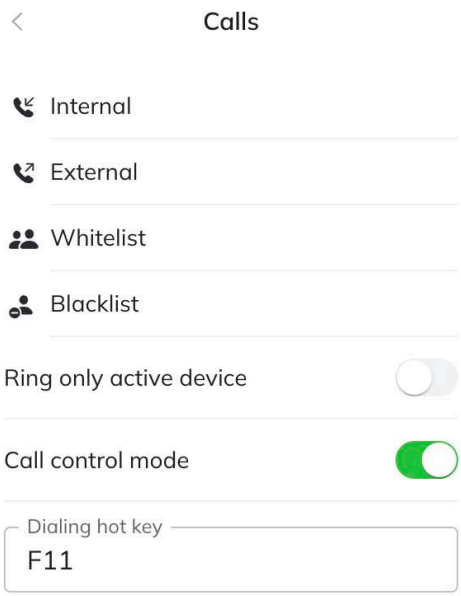


Call control mode feature

> Note:
> - This feature is disabled by default and can only be enabled by admin
> - To enable, go to *WMS -> PBX -> Features*, and enable the “Collaboration Call Control”

This feature allows you to manage calls through the web interface while audio is handled by another device. To enable:

1. Under *Settings*, click **Calls**
2. Enable the toggle **Call control mode**

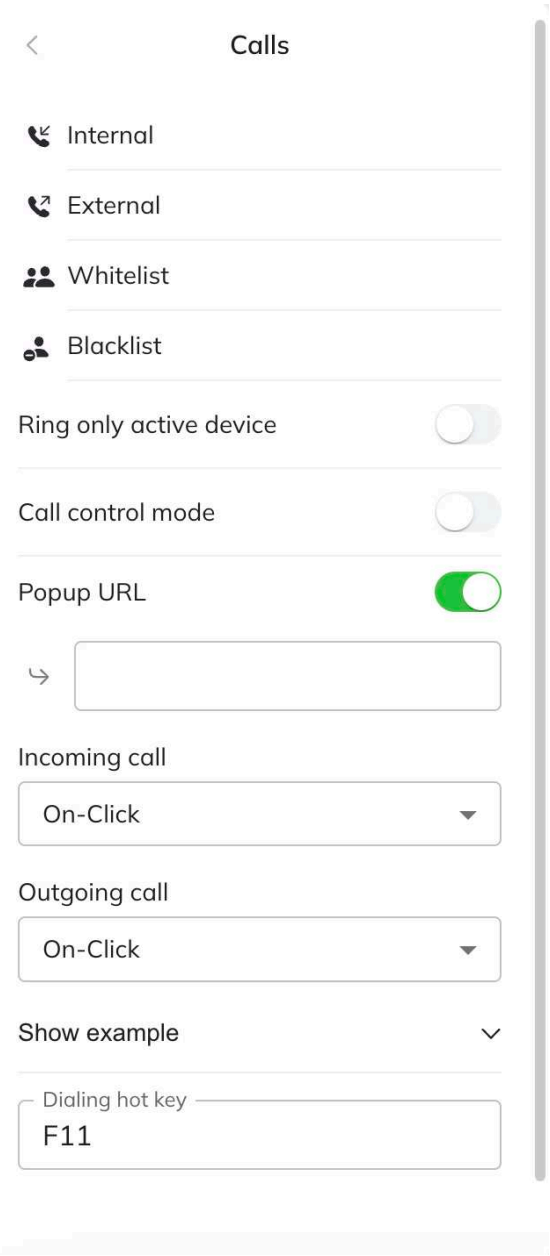


> Note: Call control mode remains enabled after logout.

Popup URL feature

This feature allows you to configure a URL to open automatically during calls and select trigger behavior for incoming and outgoing calls. To enable:

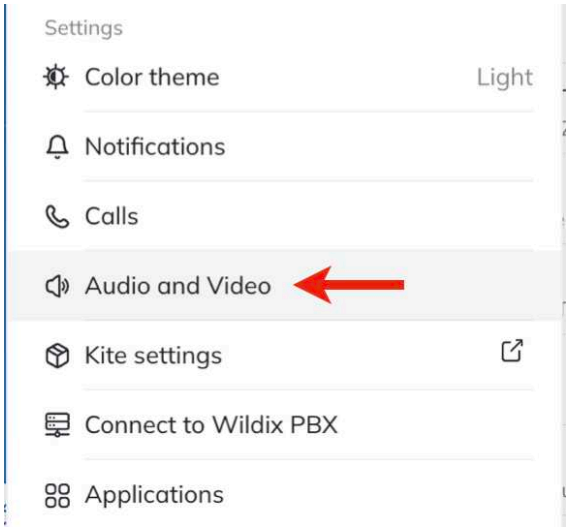
1. Under *Settings*, click **Calls**
2. Enable the toggle **Popup URL**
3. Enter the URL in the field below
4. Select the trigger behavior for *Incoming call* and *Outgoing call*: Ringing, Answer, or On-Click



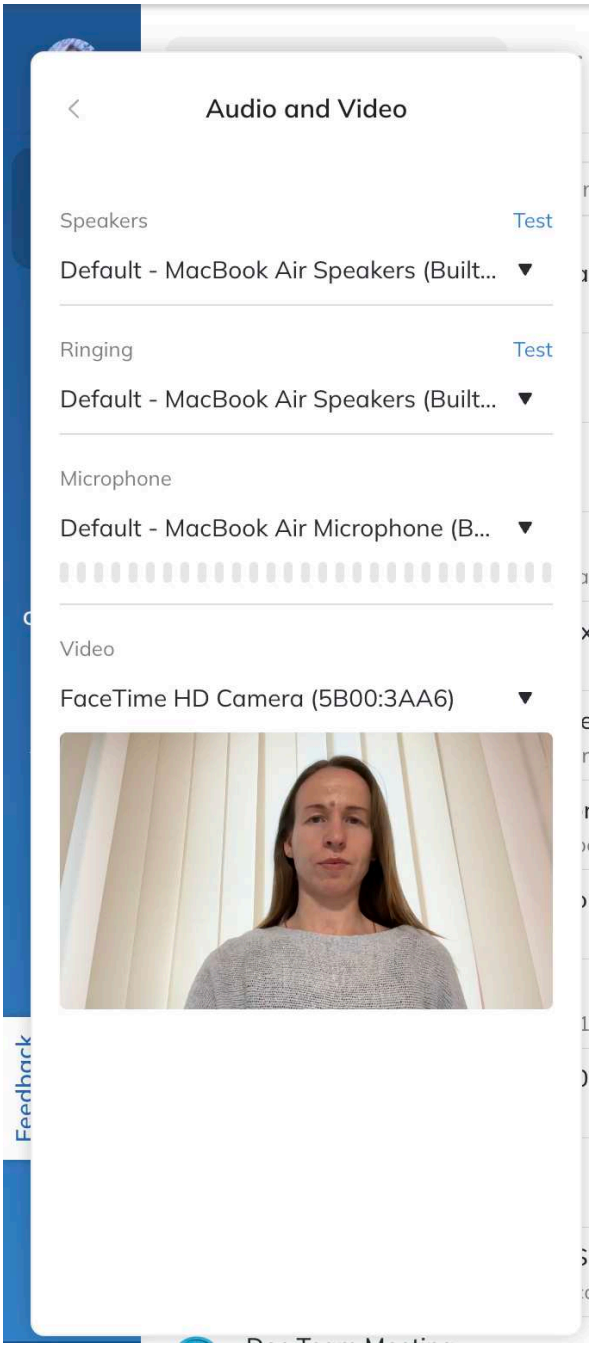
Audio and video device settings

To change the active devices for audio/ video:

1. Click on your user picture in the upper left-hand part of the screen to open *Settings*
2. Under *Settings*, click **Audio and Video**



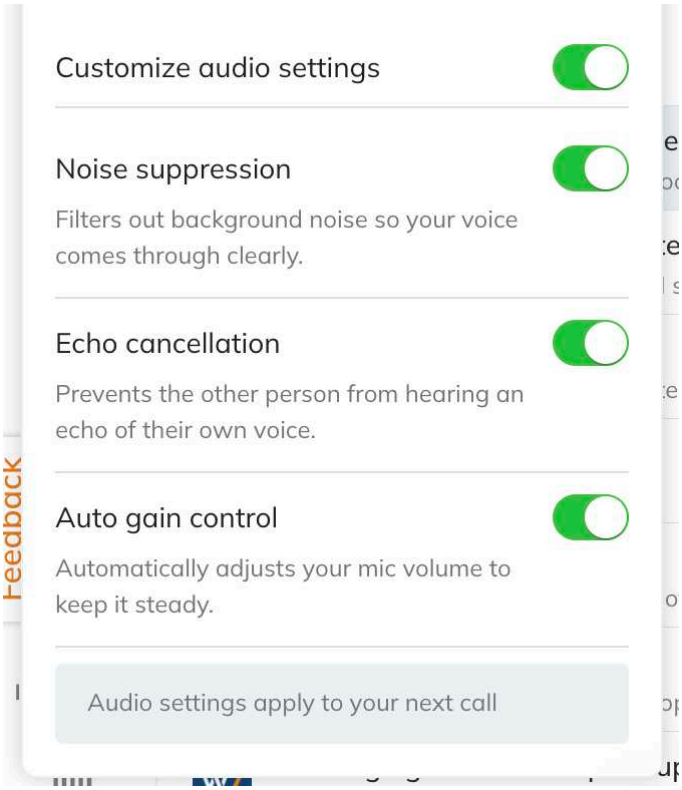
3. In this menu, you can select and test the active device for Speakers, Ringing, Microphone and Video:



Audio processing settings

Web users can manually control noise suppression, echo cancellation, and auto gain control for calls. Enable the **Customize audio settings** toggle to manually manage the following options:

- **Noise suppression:** filters out background noise so your voice comes through clearly
- **Echo cancellation:** prevents the other person from hearing an echo of their own voice
- **Auto gain control:** automatically adjusts your mic volume to keep it steady



During an active call, open the **Call Info** pop-up to see the effective status (ON/OFF) of these features.

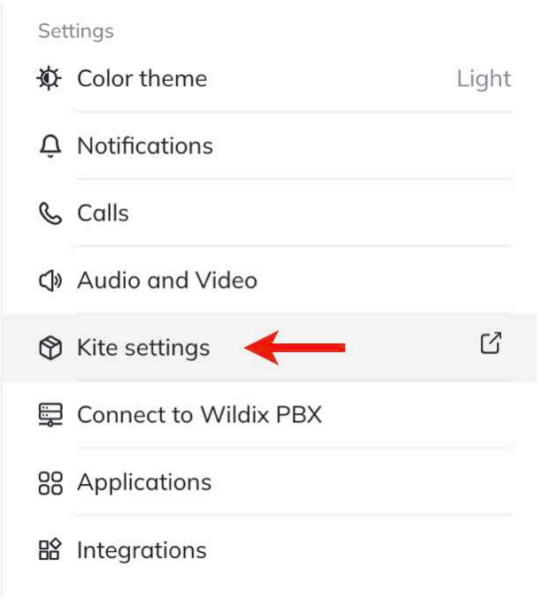
Notes:

- Noise suppression is enabled by default for all users to ensure high audio quality
- Audio settings apply to your next call
- Local user settings have the highest priority over PBX-level configurations

Kite settings

Kite settings let you create a professional email signature with contact-me button, which allows recipients to reach out to you via Collaboration 7.

1. Click on your user picture in the upper left-hand part of the screen to open *Settings.*
2. Under *Settings,* click **Kite settings**

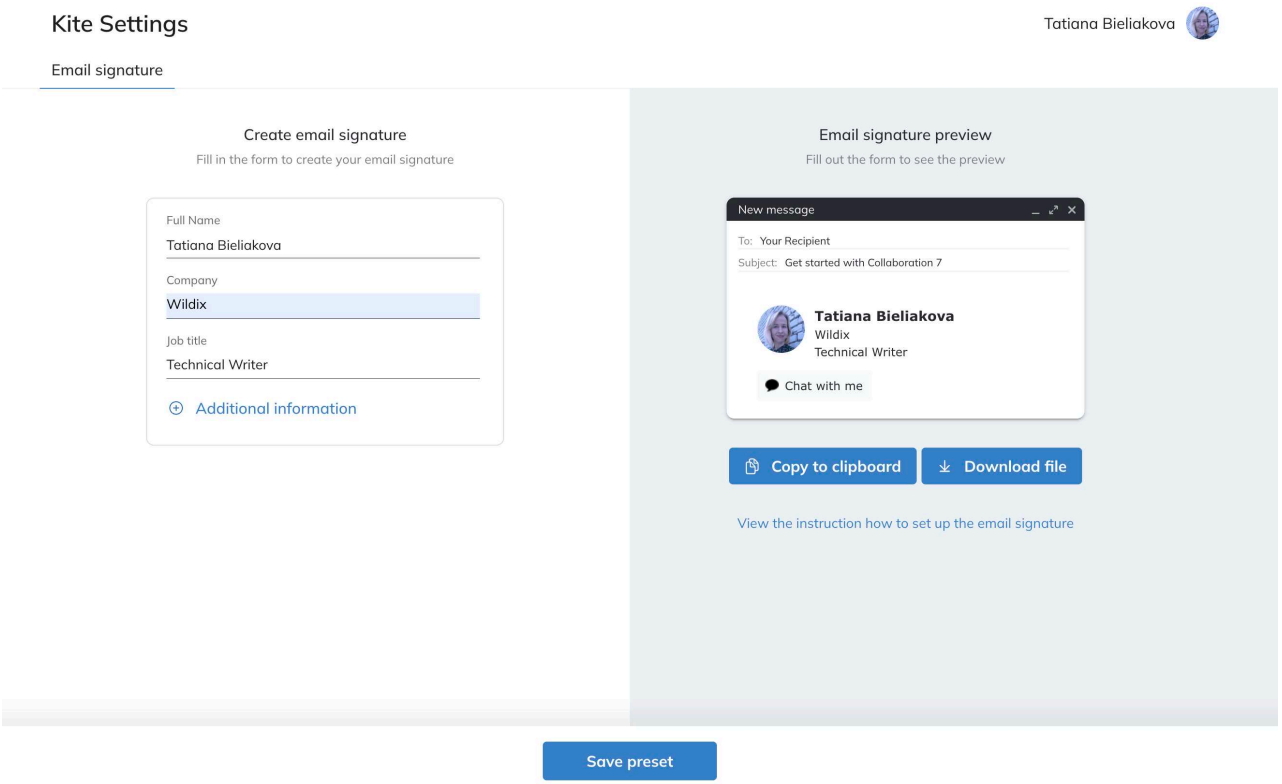


3. You get redirected to this portal: https://app.wildix.com/kite/console

Email signature

1. Fill out the form which includes the following fields:

- Full Name
- Company
- Job title
  Additional information:
- Phone
- Address
- LinkedIn
- Custom link
- Title for custom link
- Custom text field



- On the email preview, you can see how your email signature looks like. The button *Chat with me* is added automatically.

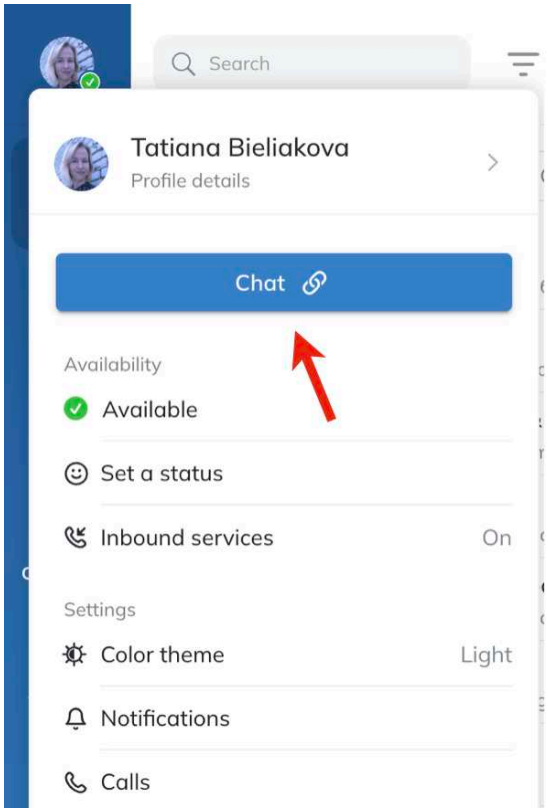
2. Under *Email signature preview*, click **Copy to clipboard** or **Download file** to further apply the signature in your email client

Documentation: How to apply your email signature.

> ⚠ Note: If you change avatar/ name/ or other data, a new signature with the updated info should be created.

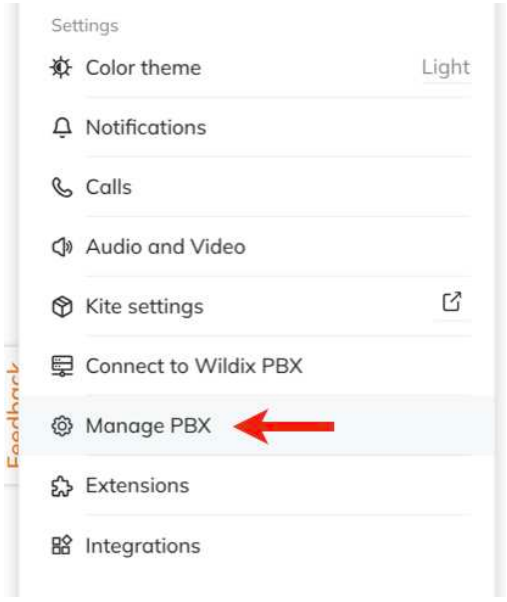
External profile link (WebRTC link)

To get your profile link, by which external users can contact you, click on the **Chat link** button under *Profile details* section in Settings:



Manage PBX (admin only)

Admin users can access PBX via Collaboration 7 *Settings* -> **Manage PBX** button:

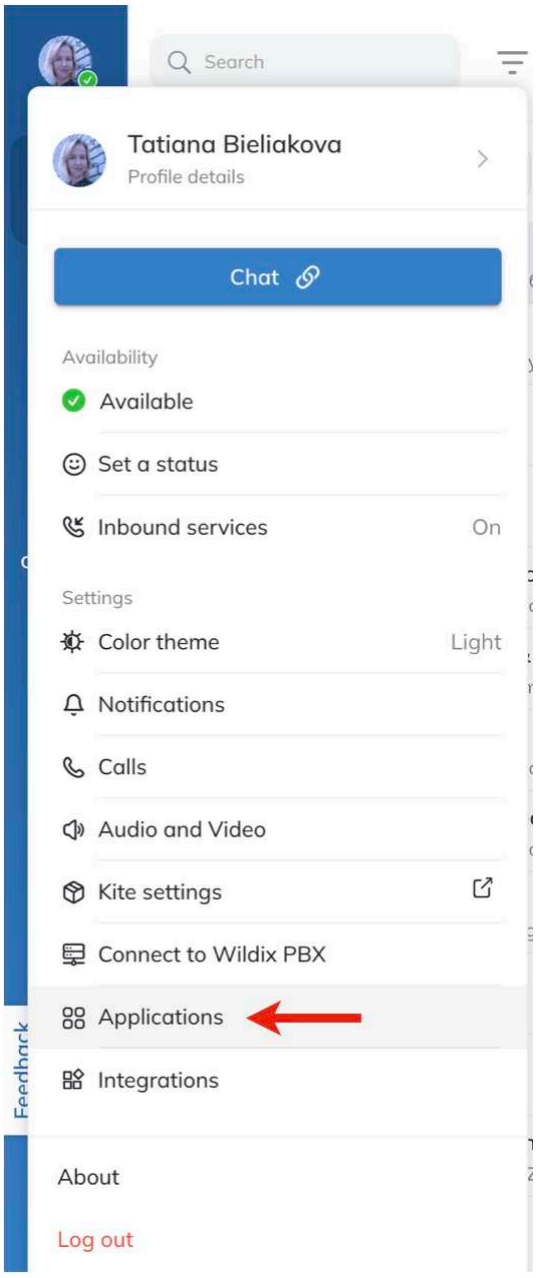


For other users, this option is not displayed.

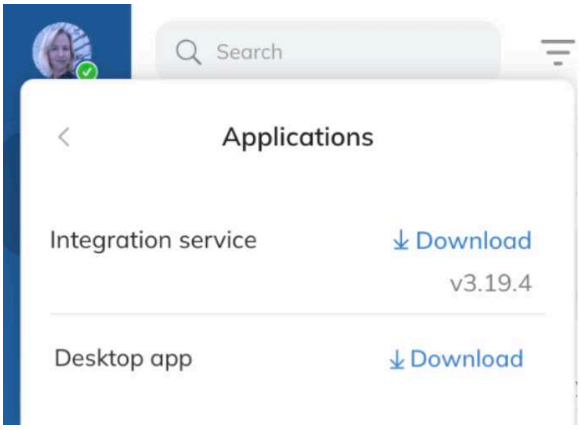
Applications

In this menu, you can install the Wildix Integration Service (required for Headset Integration):

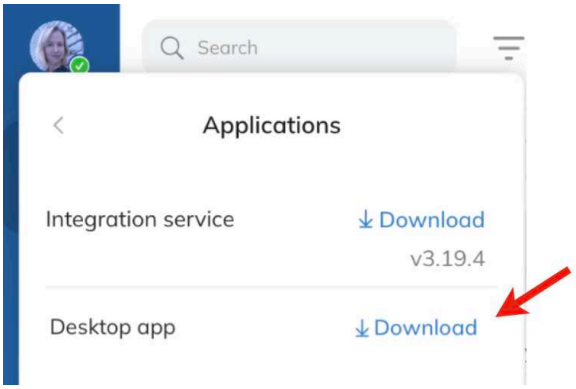
1. Click on your user picture in the upper left-hand part of the screen to open *Settings*
2. Under *Settings*, click **Applications**



3. Install Integration service:

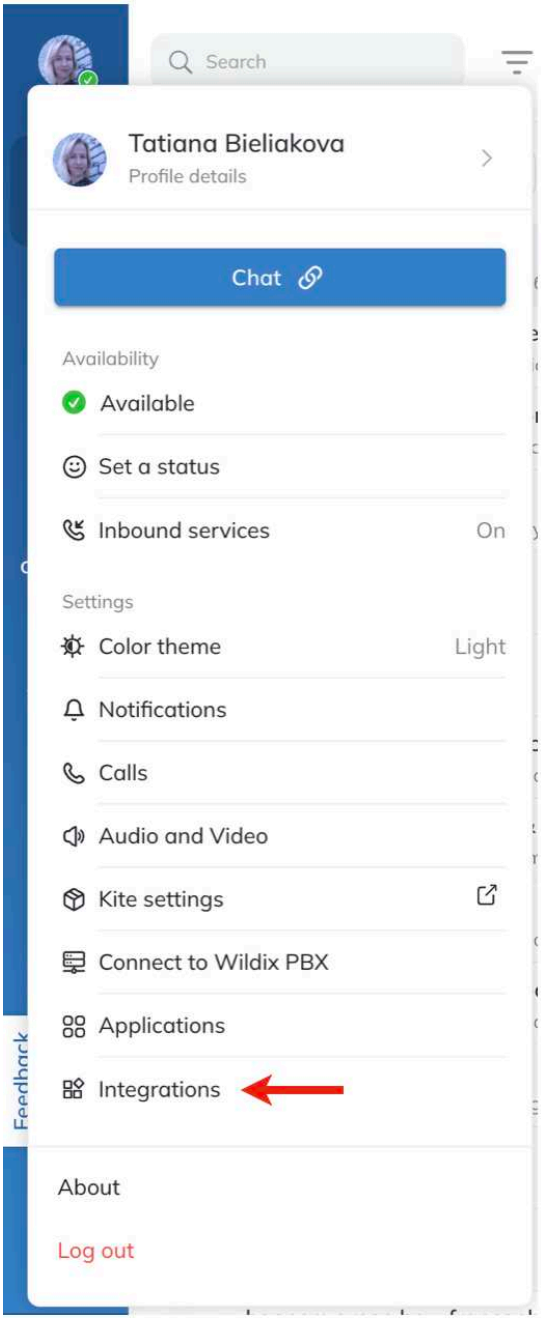


You can also download the Desktop version of Collaboration 7 from this menu.

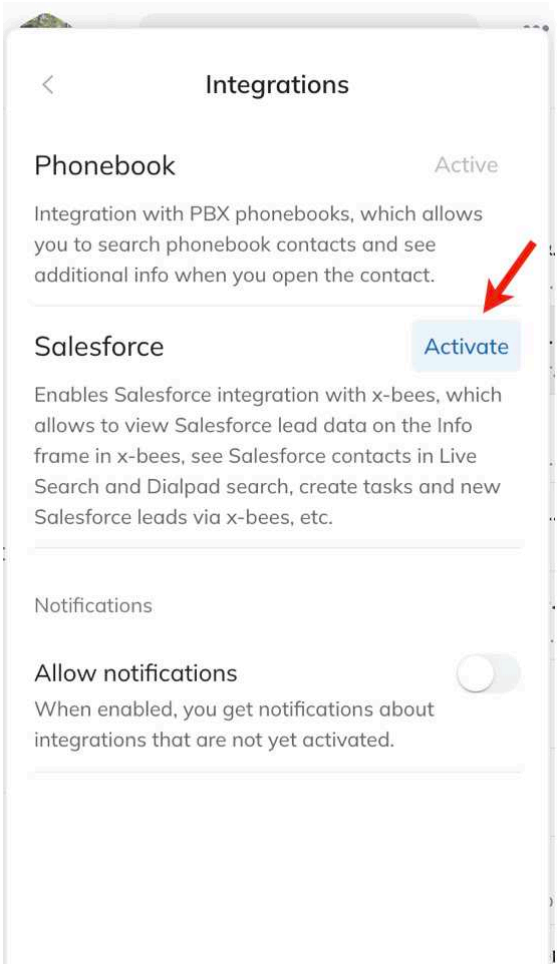


Integrations

In this menu, you can see the list of connected integrations and their status:



Some integrations may need authorization. To activate integration, click the **Activate** button in front of the relevant integration.

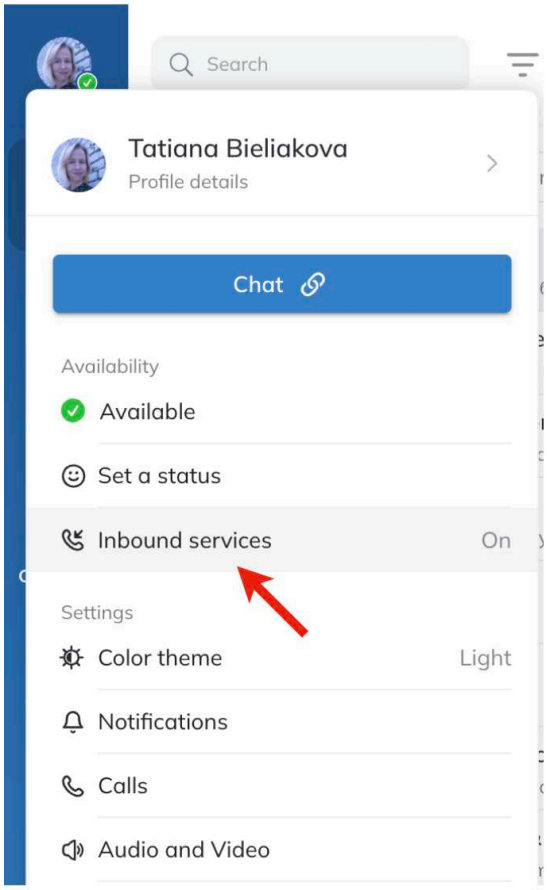


For more details, check out the document How to manage Client integrations.

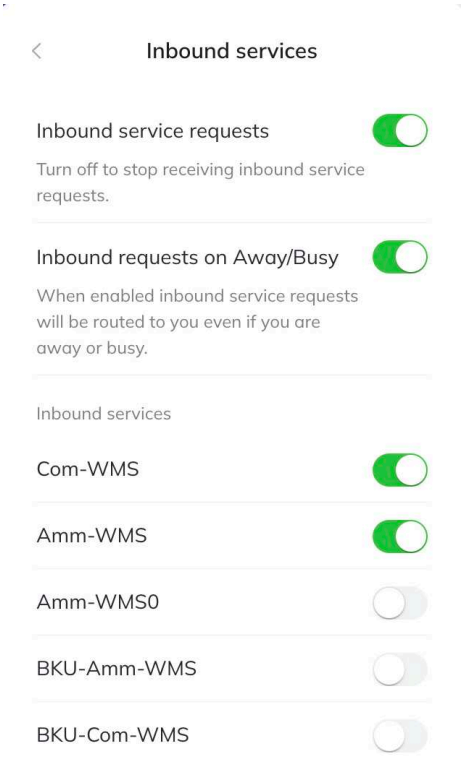
Inbound services ("Contact center")

The contact center feature allows you to view the available services (call groups) and dynamically log in/ log out from them:

1. Click on your user picture in the upper left-hand part of the screen to open *Settings*
2. Under Availability, click **Inbound services**

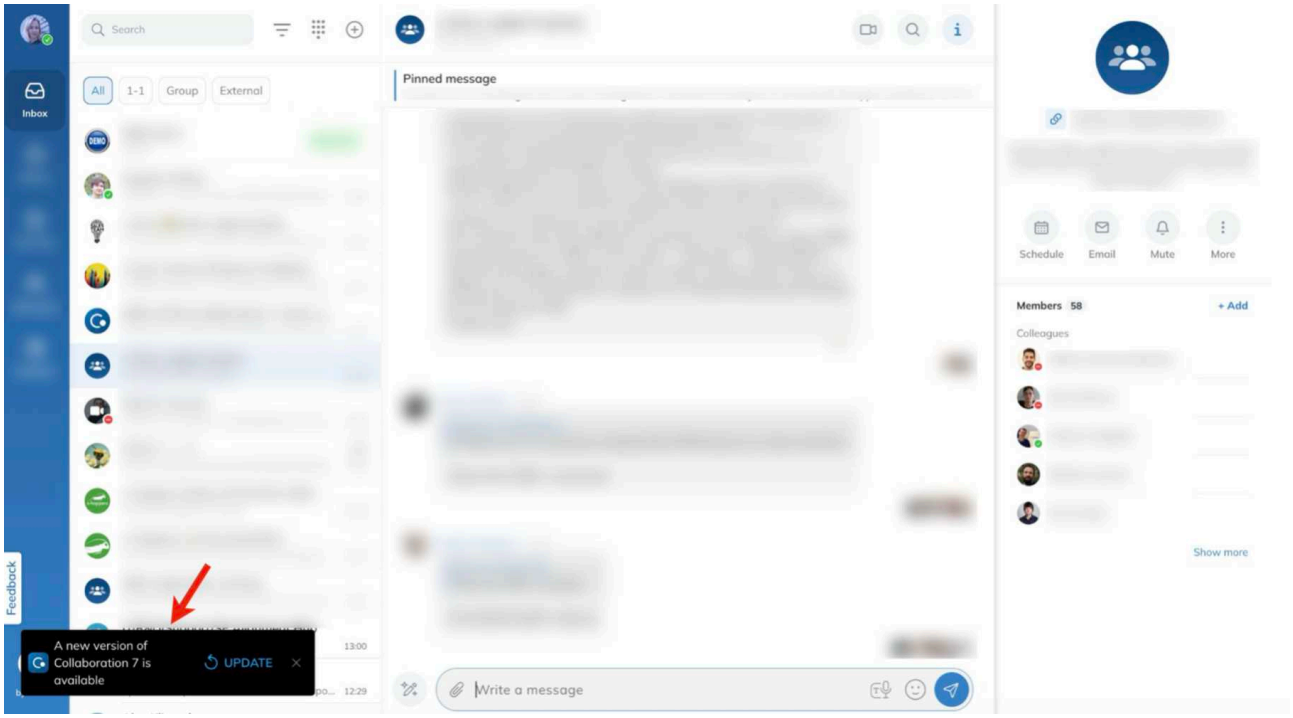


3. Enable the switch next to *Inbound service requests*: the switch allows you to dynamically join the inbound services (call groups)
4. Under *Inbound Services*: enable those services (call groups from your PBX) that you would like to join as a call agent (in this menu you cannot change the status in services, to which you were added statically via WMS)



Updates

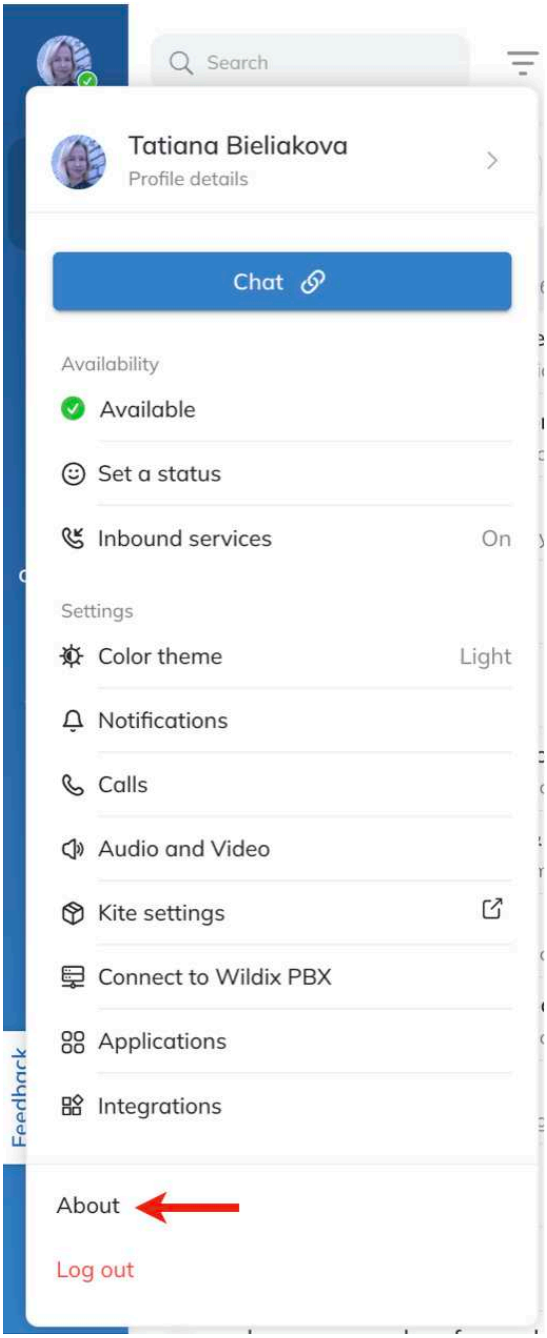
When there is a new version available, user can see the following notification and the only step that needs to be done to get the update is to refresh the page:



You can check all the latest changes in Collaboration 7 Changelog.

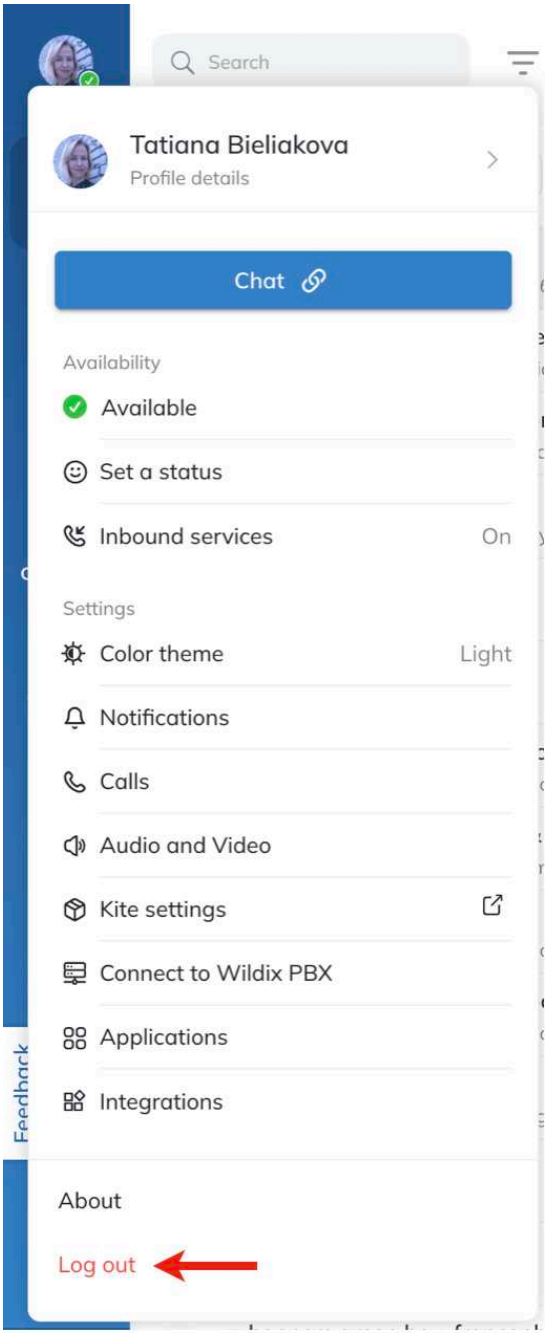
Check the current version:

1. Click on your user picture in the upper left-hand part of the screen to open *Settings*
2. At the bottom of the screen, click **About**



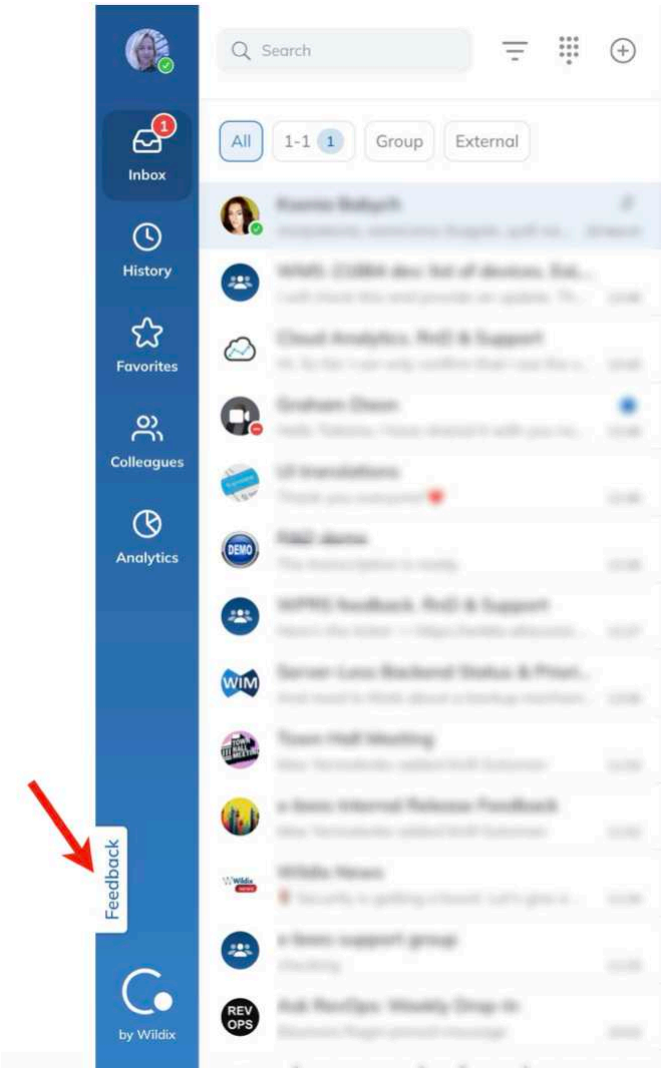
Logout

Click on your user picture in the upper left-hand part of the screen to open *Settings,* then click **Log out**



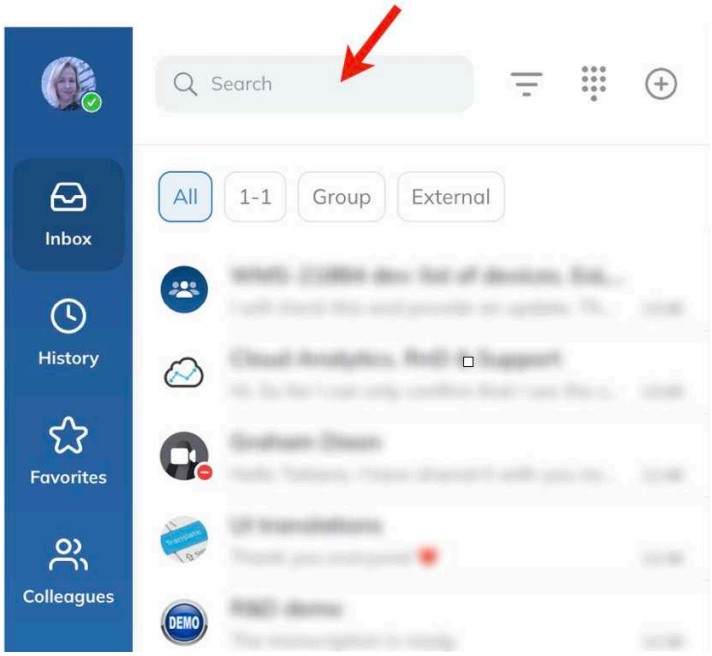
Feedback

You are invited to send us feedback, provide suggestions and report problems! To send your feedback, click on the **Feedback** button at the left of the screen:



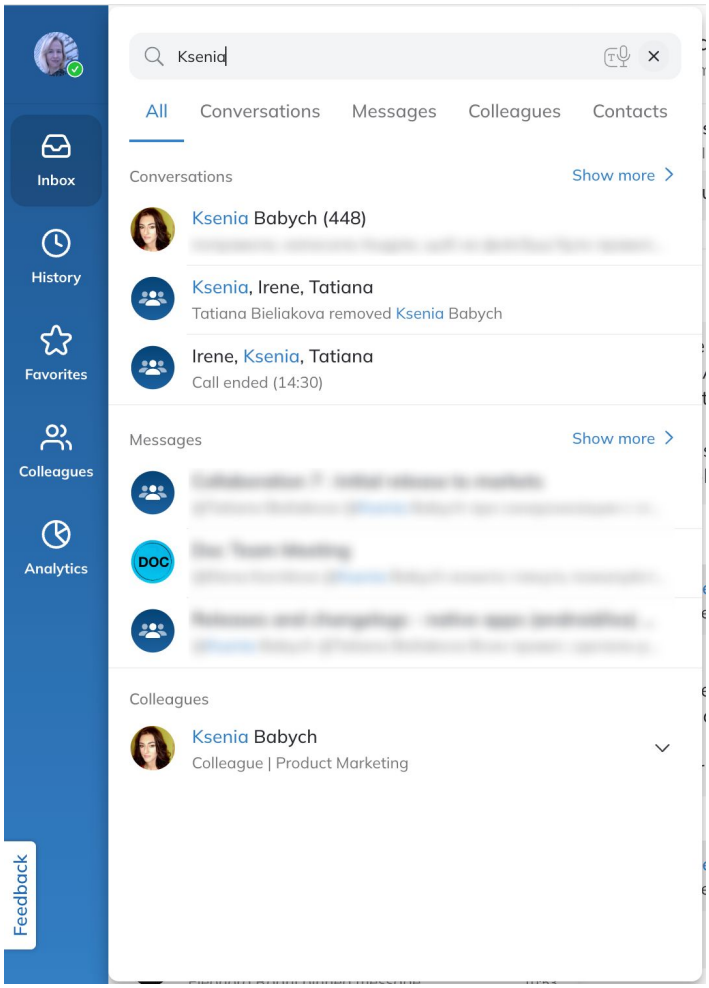
Search

To start a search for a Contact/ Colleague etc., start typing in the **Search** field:

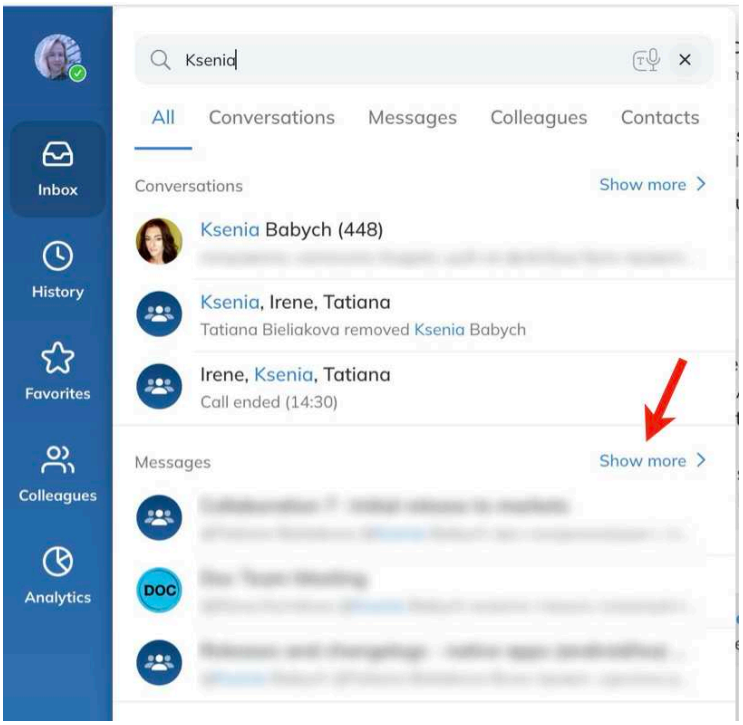


Search results are split in the following sections:

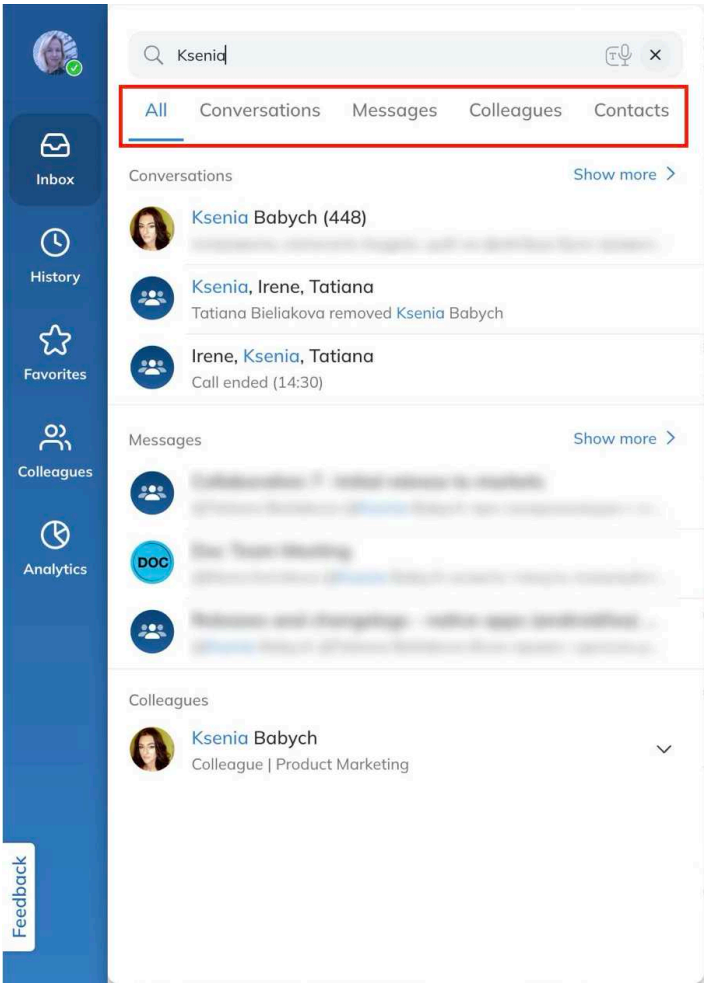
- Conversations
- Messages
- Colleagues
- Contacts



Each section on the *All* tab displays 3 results for each section, with the possibility to press the *Show more* button, in case there are more results found:



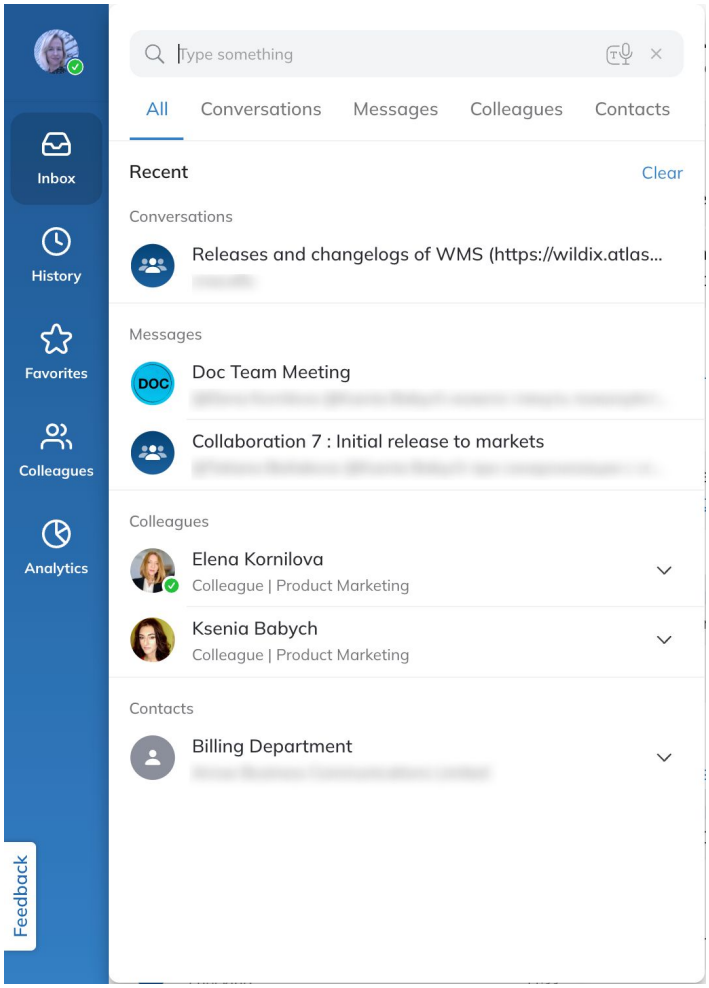
You can also switch between tabs (Conversations, Messages, Colleagues, Contacts) via the top panel:



On the tabs you can view more results of the selected category. On the Messages tab, up to 30 items are displayed, to view more results click *Show more* at the end of the search results list. On other tabs, all search results are displayed. In the Contacts section, integration contacts are listed first, then Phonebook results and other contacts from other integrations set up in the system.

Recent searches

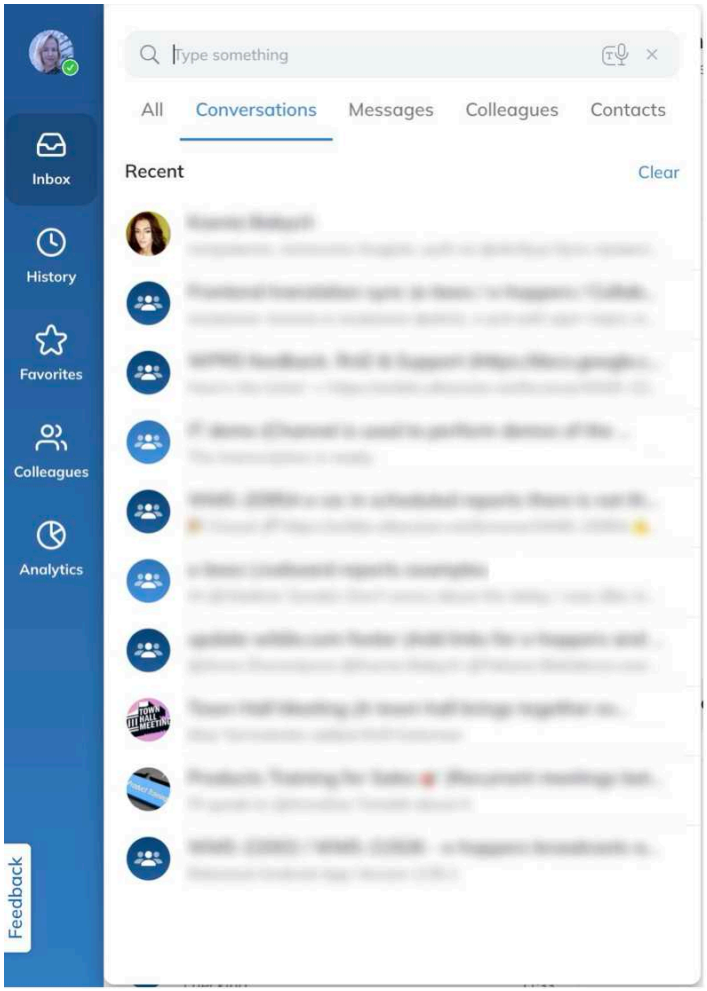
Before performing a search, you can see the last 3 searches of each category (conversations, messages, colleagues, contacts):



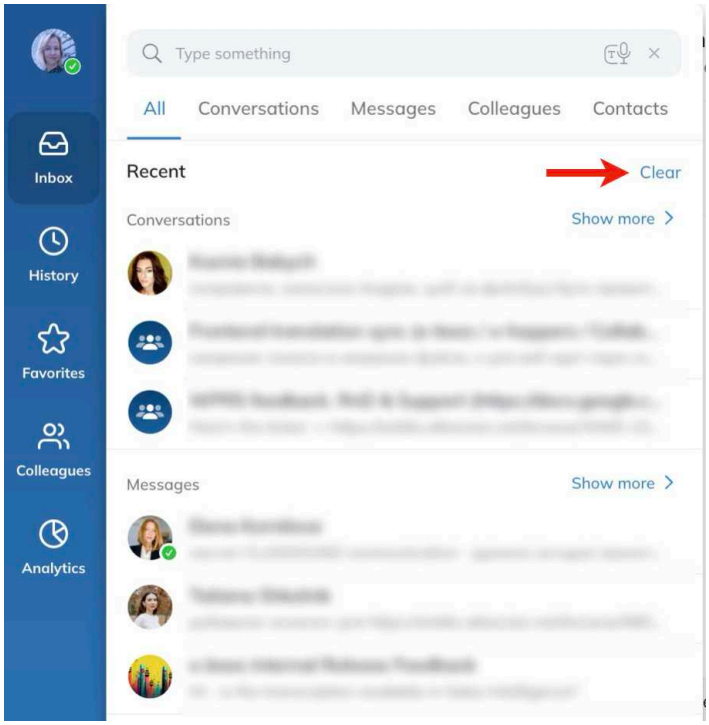
Note:

- Only items which a user interacted with (e.g. clicked on the search result) are saved to recent searches.

On other search tabs (Conversations, Messages, etc.) up to 10 recent search results are displayed:



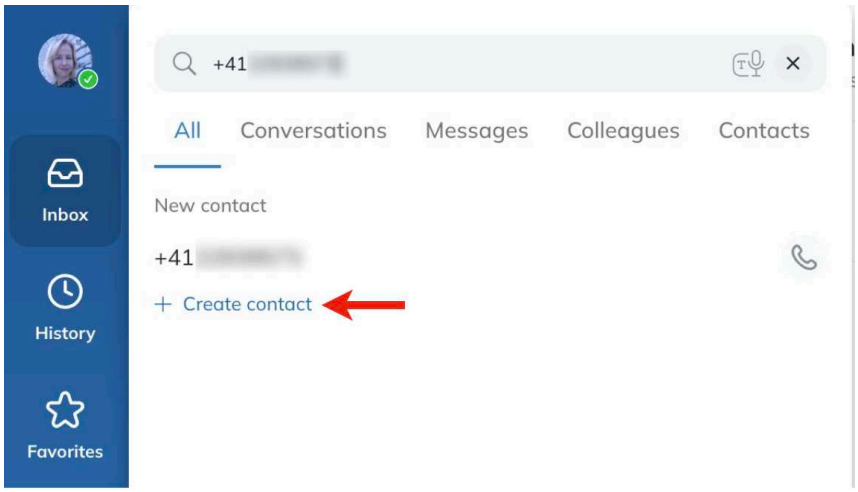
To clear recent searches, click **Clear**:



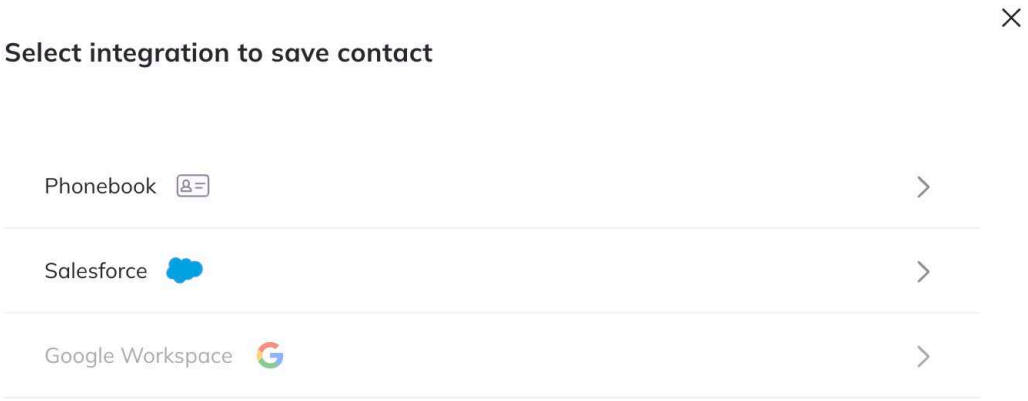
Create Contact

In case you enter a phone number in the Search field and there is no match found, you have an option to create a contact:

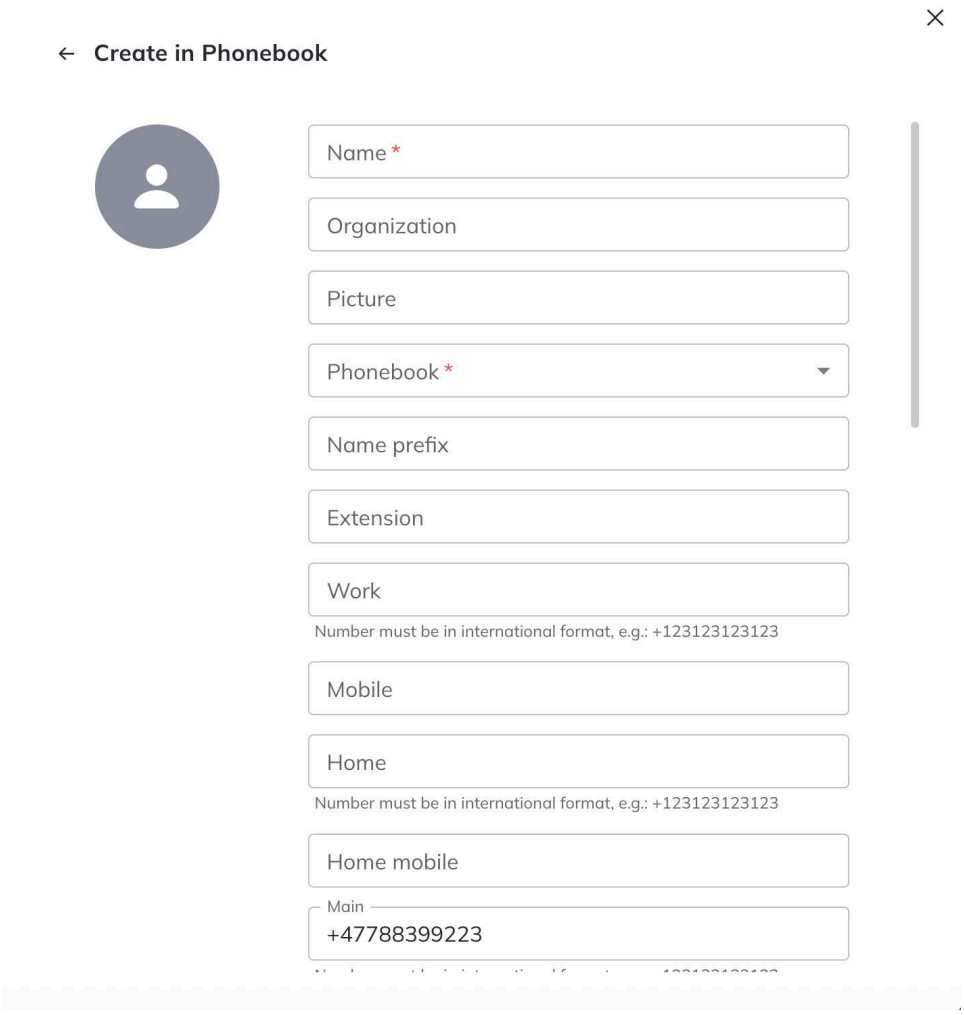
1. Click **Create contact** button



2. Select which integration to save the contact to



3. Fill out contact details and click **Create**

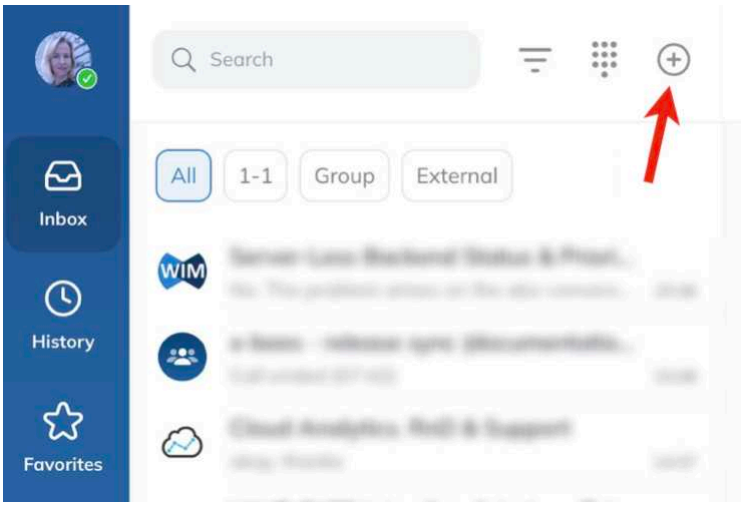


Conversations

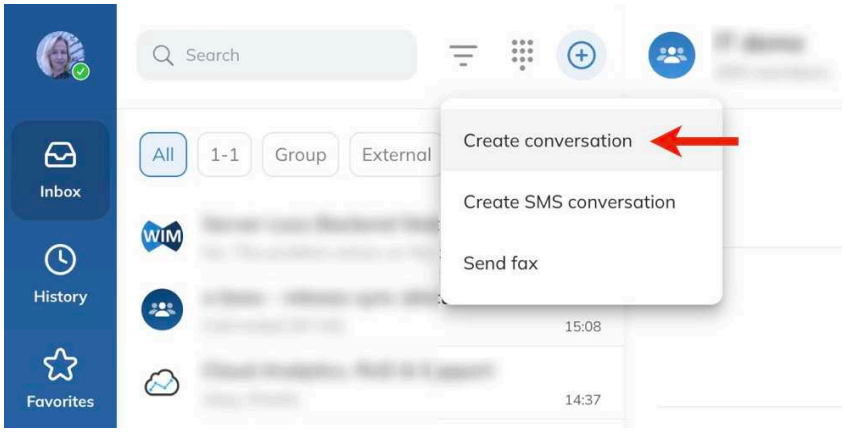
Group conversations

Create a new conversation

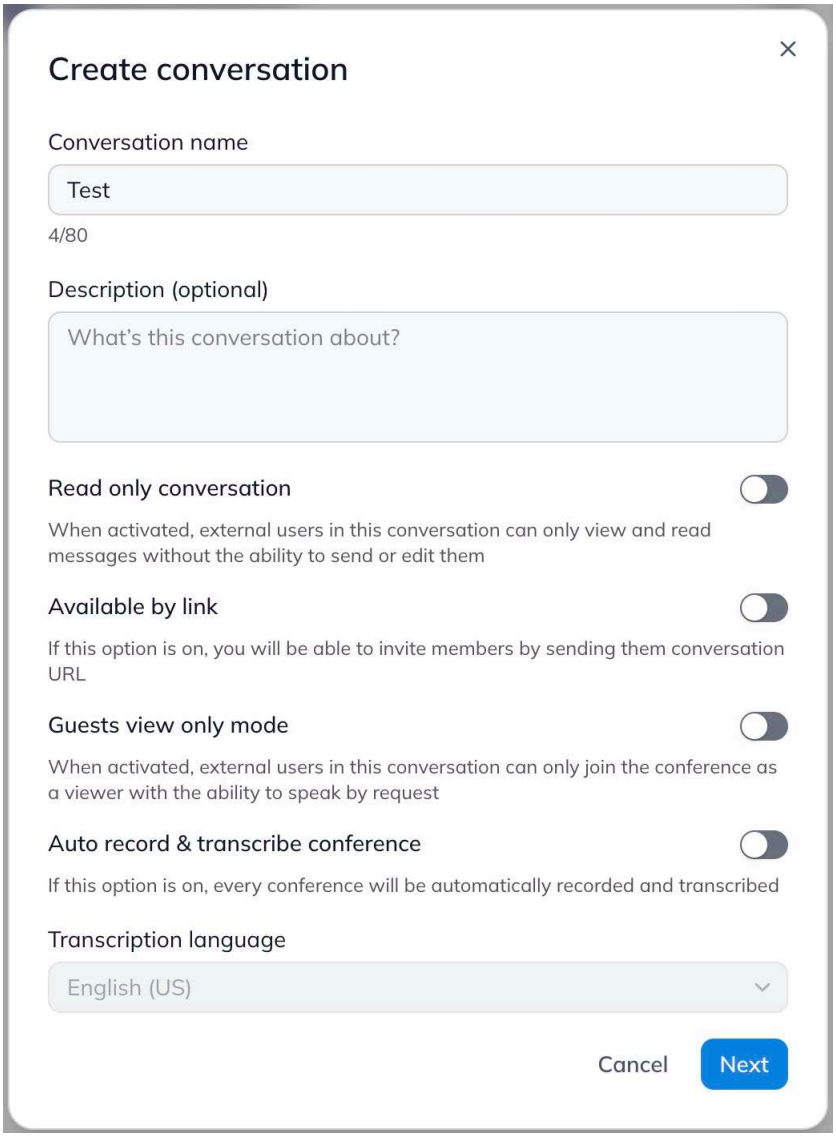
1. Click on **+** from the top panel



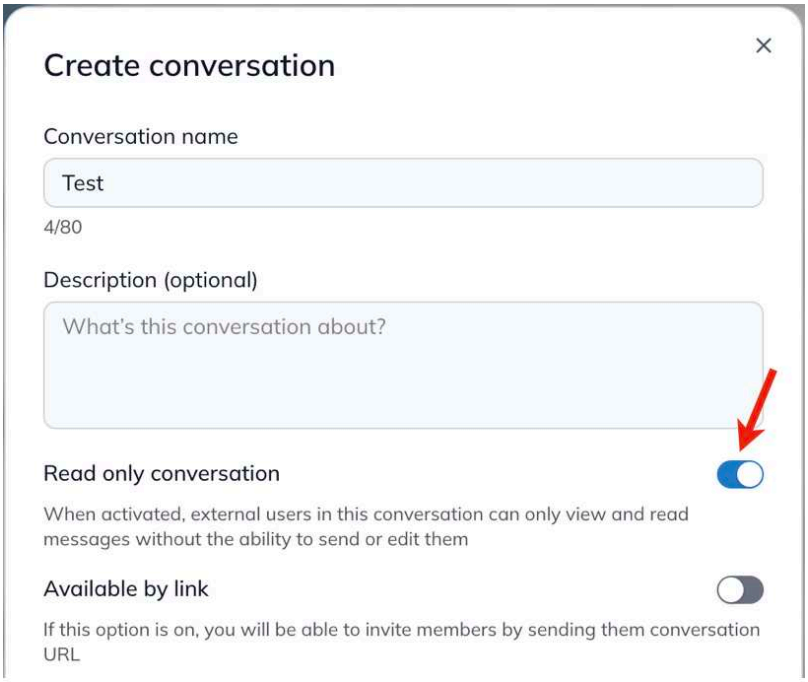
2. Choose the option **Create conversation**



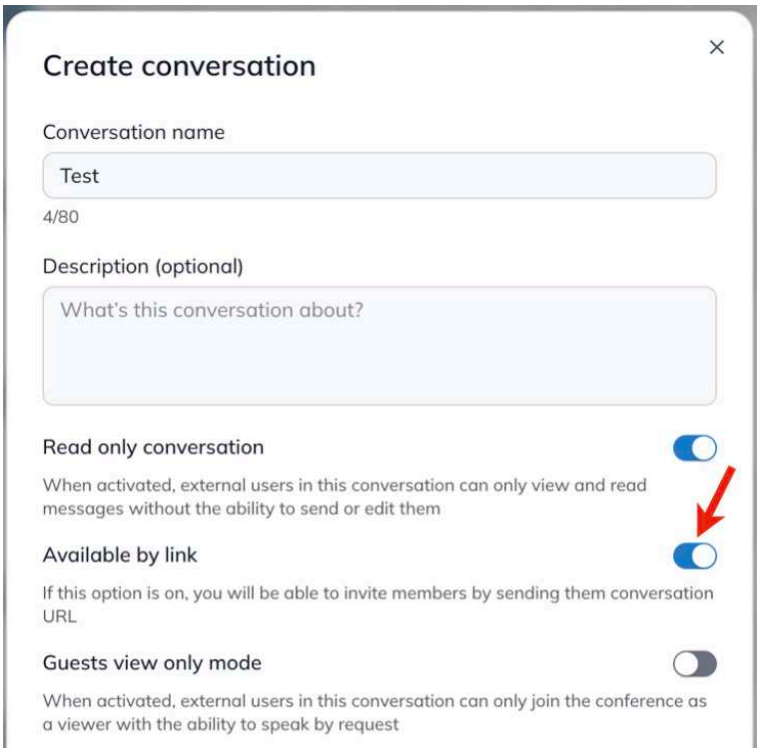
3. Enter conversation name and description (optional) and click **Next**:



If you want external users in the conversation to have read-only access to it, turn the toggle on in front of the **Read only conversation** option. External members in read-only conversation can view messages, add reactions, but cannot send messages, view the list of members or who sent message reactions.



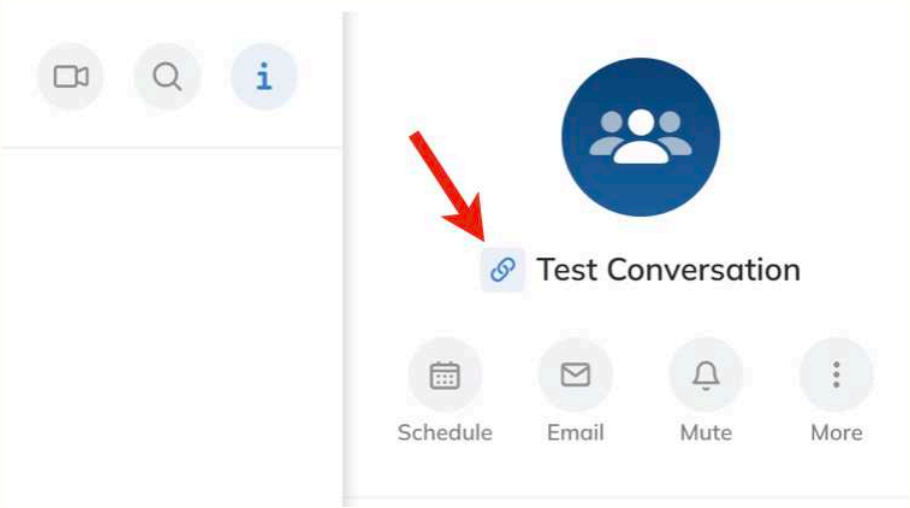
If you want the conversation to be available by link, turn the toggle on in front of **Available by link** option:



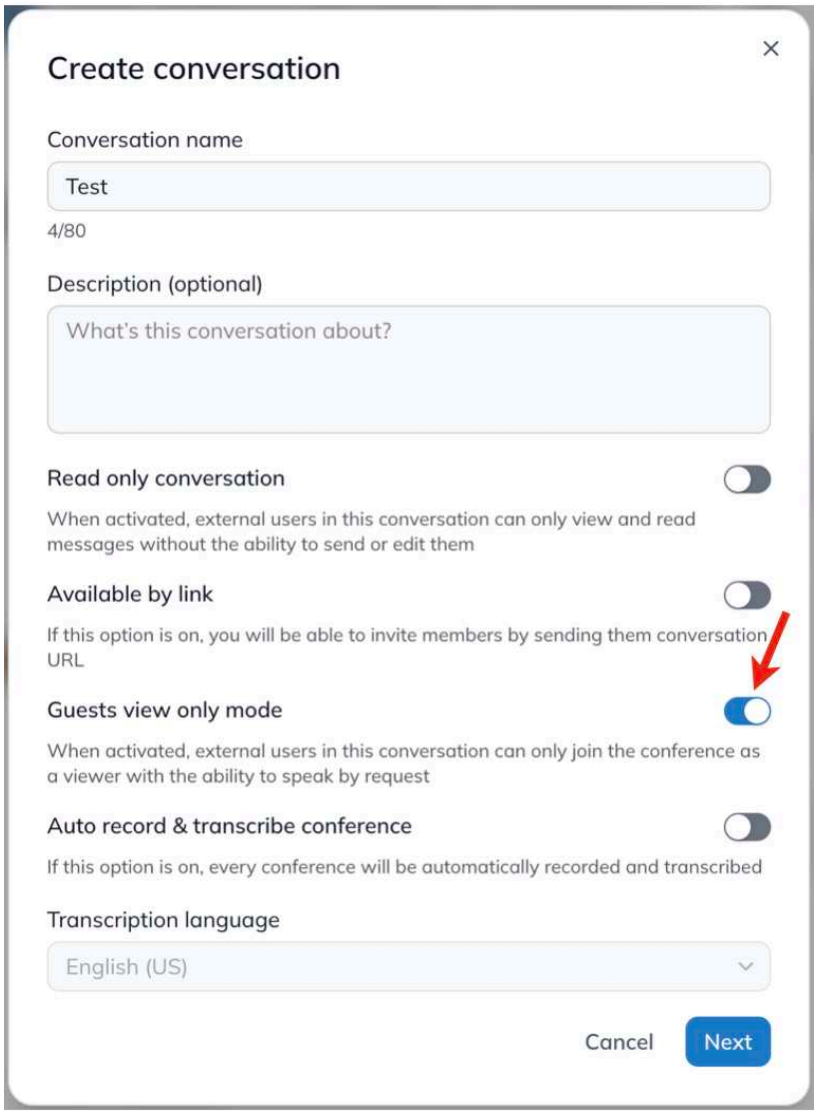
Note:

- Conversations created by external users are available by link by default.

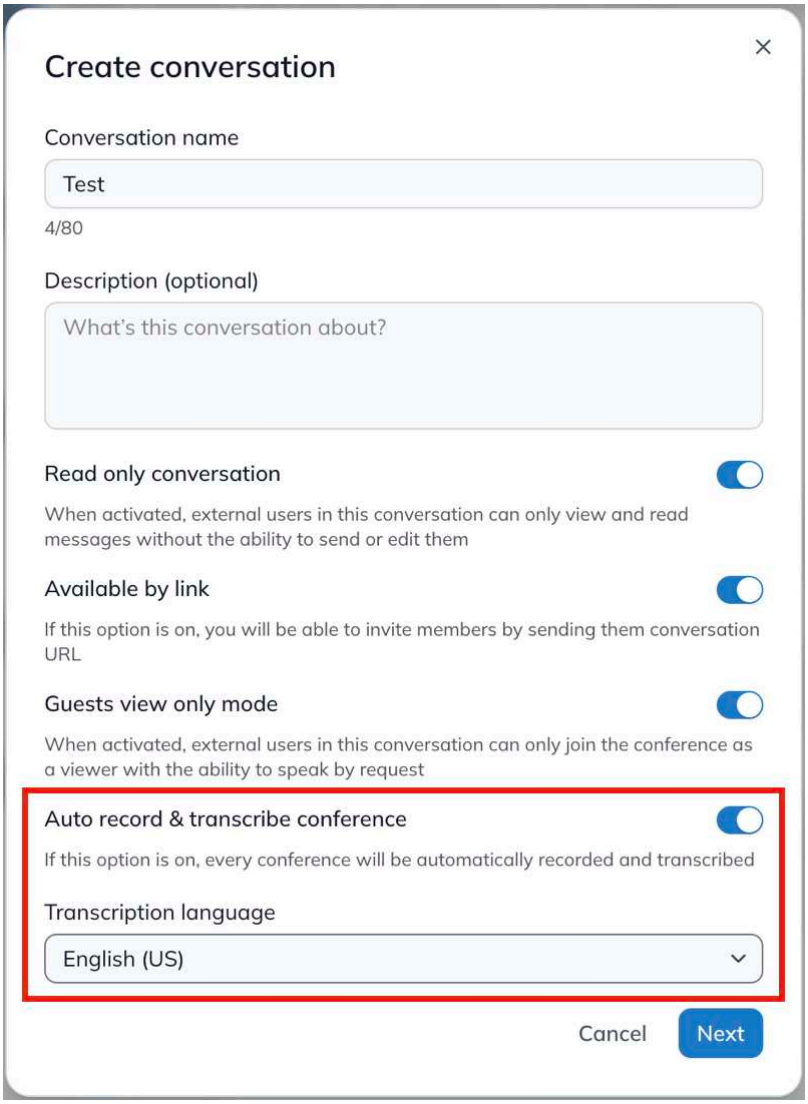
- When conversation is available by link, the relevant link icon is displayed next to conversation name on the Info frame. Clicking on the icon and sending the URL to other users, you can invite them to the conversation:



To make external users who join conferences in this conversation join as visitors, enable **Guests view only mode** (this option can be used for Webinar mode; for more details, see the documentation):

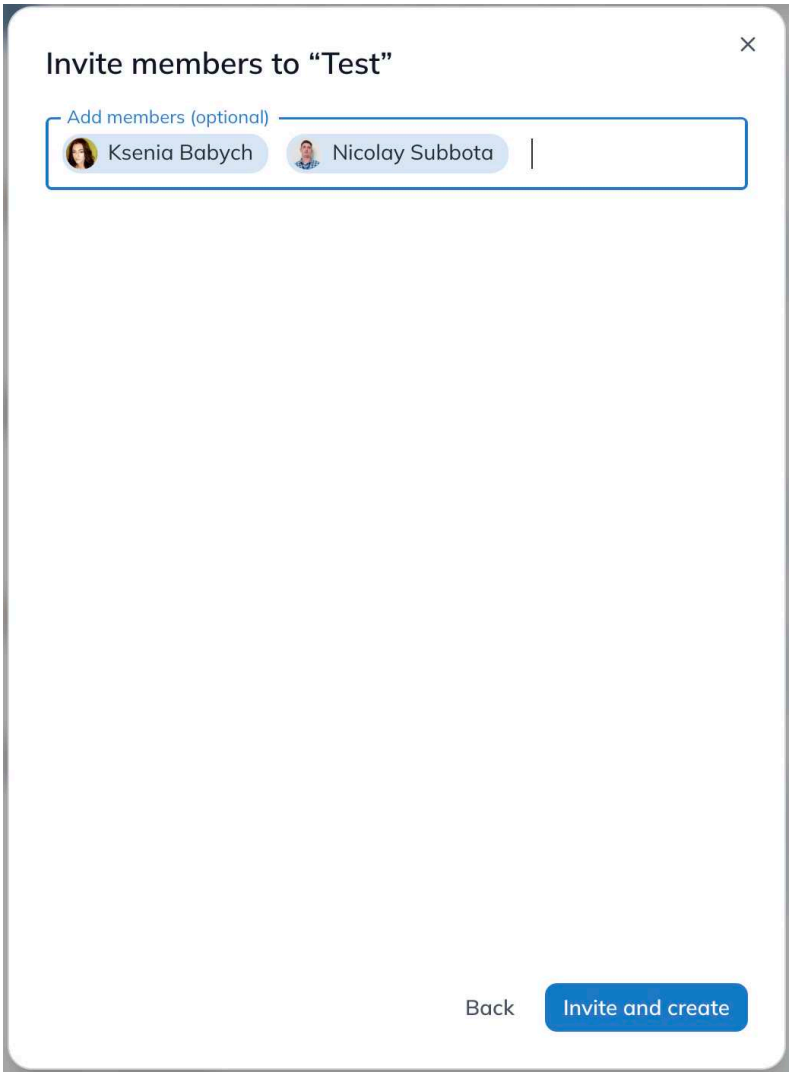


You can also choose whether conferences in this conversation are automatically recorded and transcribed, and select the transcription language:



4. Add participants and click **Invite and create**:

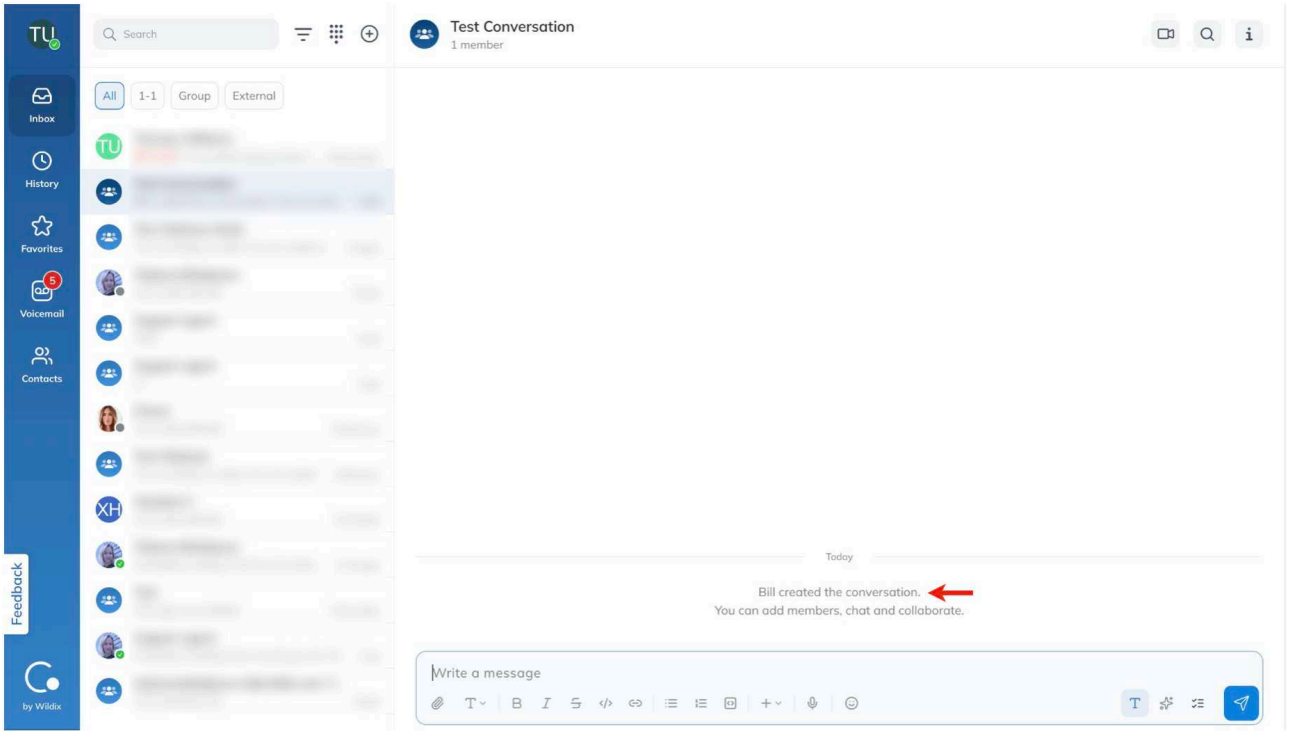
- You can add PBX users, Phonebook contacts, email addresses



Note:

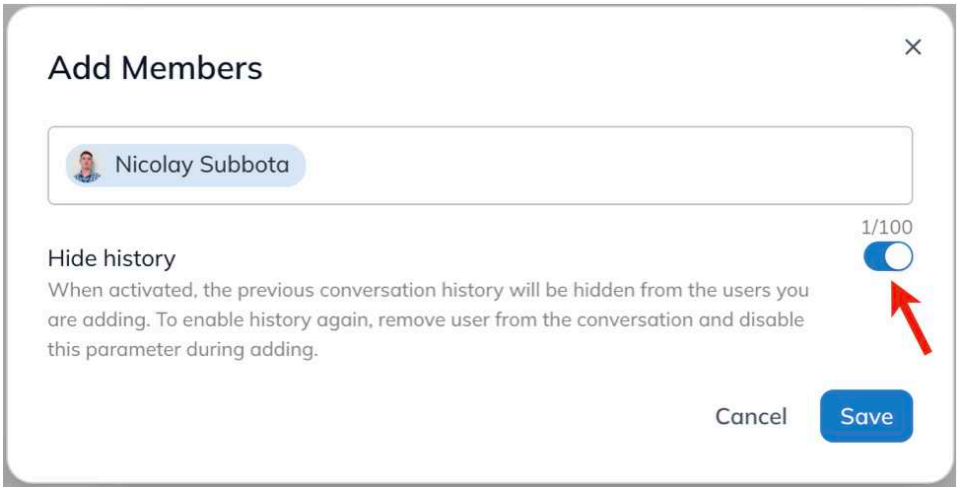
- The maximum number of users that can be added to a conversation is 1000.
- Participant should have an email address to be added to a conversation.

When conversation is created, the system message displays who created the conversation:



Hide conversation history

When adding new members to already existing conversation, it is possible to hide conversation history from the member you are adding. For this, enable the toggle **Hide history** on the *Add Members* screen:



The option is disabled by default and new users joining the conversation can see its history, unless the toggle was manually enabled.

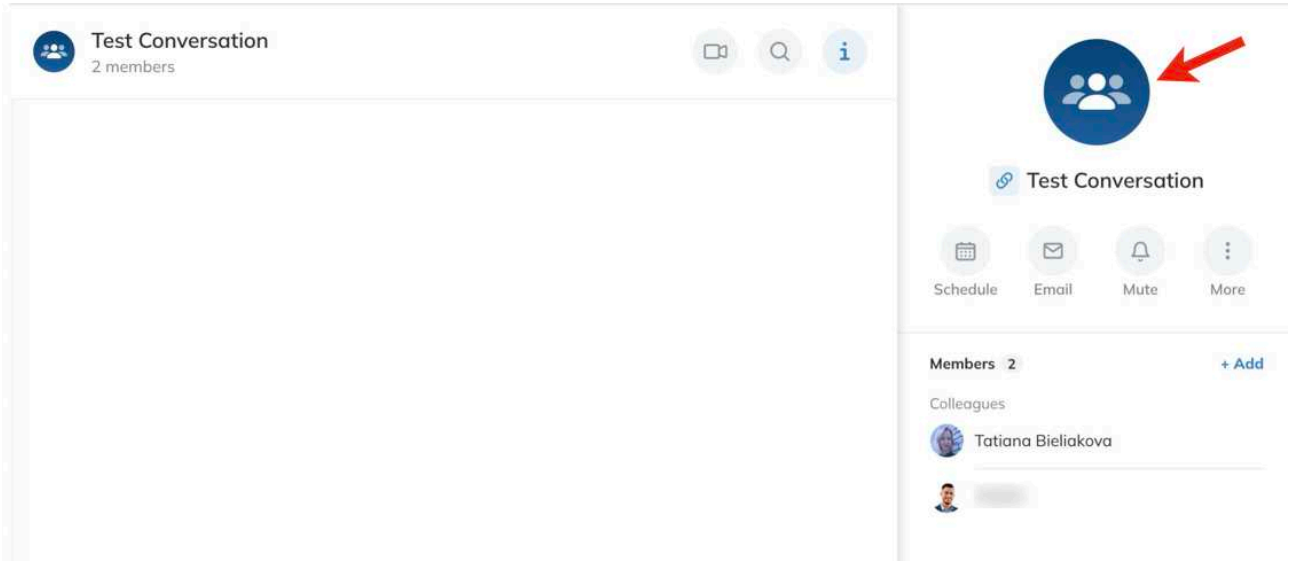
Note:

- If you added a user and hid the previous messages, but want to make them available, you need to delete the user and add again, with disabling the Hide history feature.
- Hide history option doesn't work if a user joins the conversation via link. In this case, message history is displayed by default.

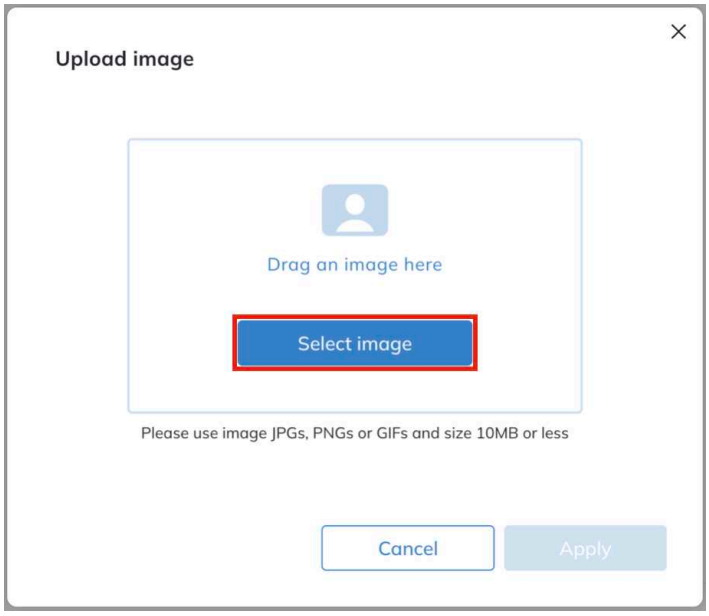
Set conversation picture

You can set custom pictures for conversations in Collaboration 7.

1. Open *Conversation Info* and hover mouse over the conversation avatar



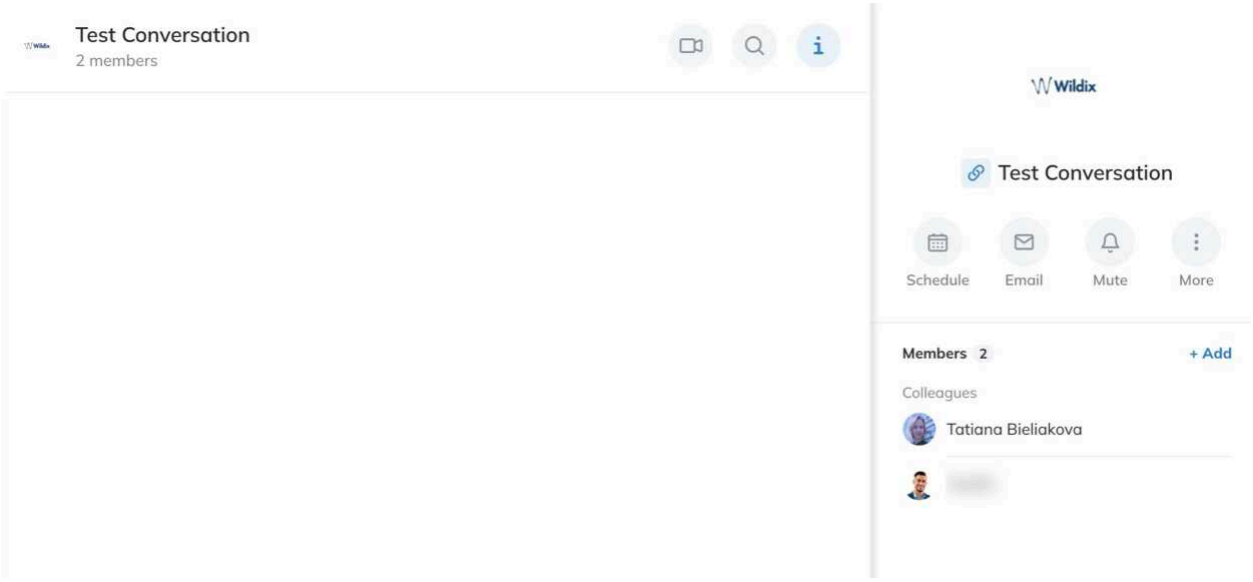
2. Drag and drop a picture or click **Select image** button and upload the picture



3. Crop and scale the uploaded image and click **Apply**



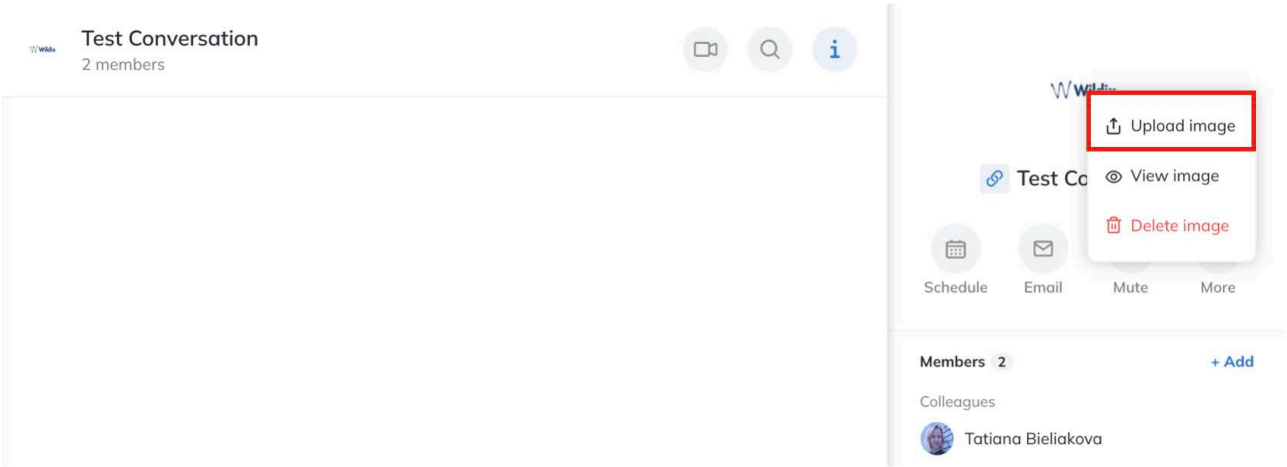
4. The uploaded image is displayed as conversation avatar



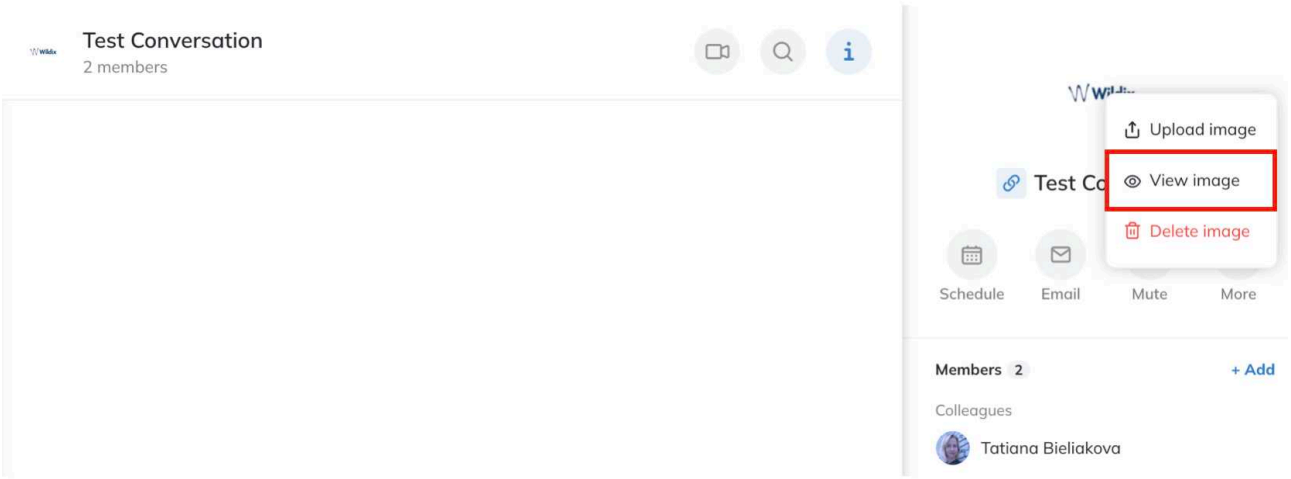
Replace conversation picture

To replace image:

1. Click on the existing conversation picture -> press the button **Upload image** and upload a new picture



2. Alternatively, you can click **View image**



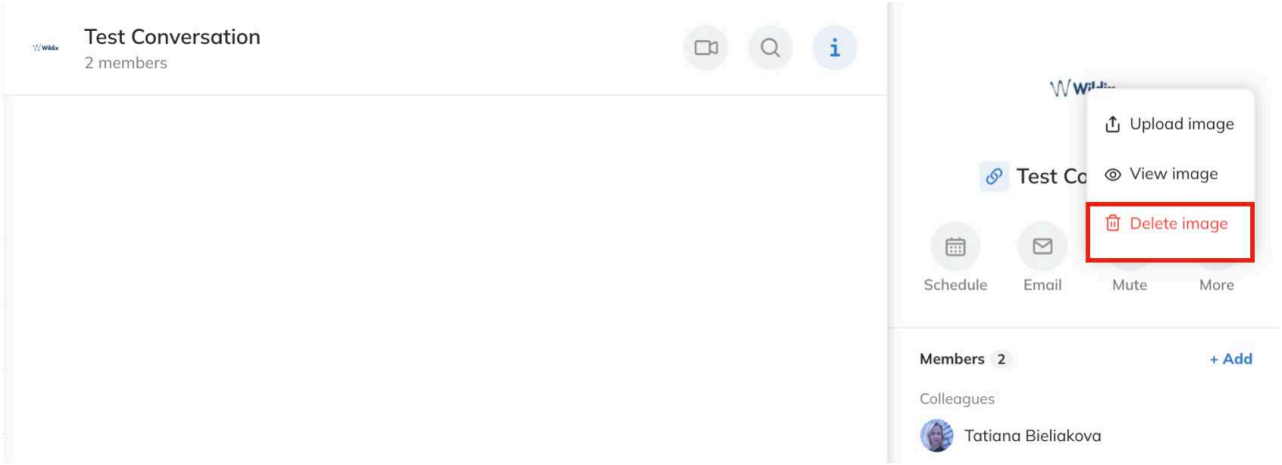
3. And on the View image screen, click **Replace**



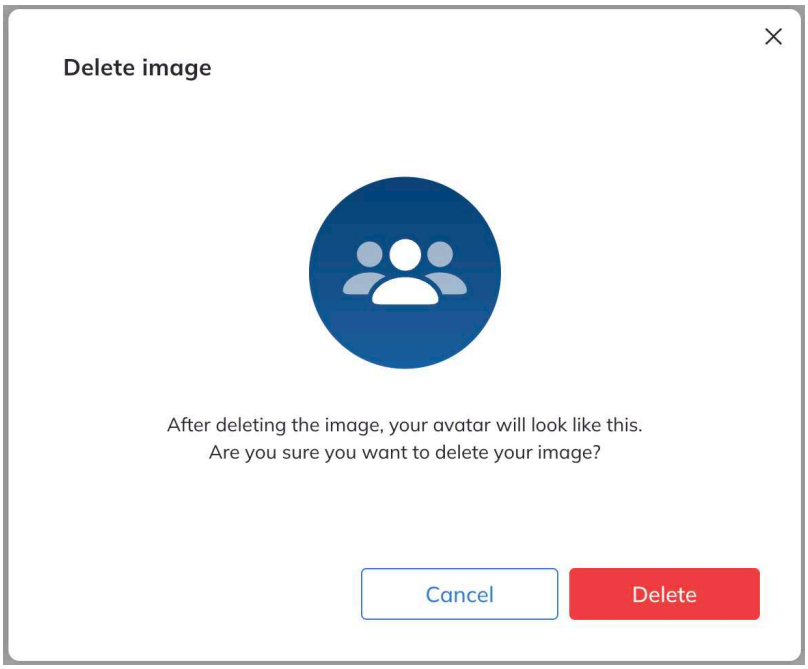
Delete conversation picture

To remove image:

1. Click on the conversation picture **Delete image**

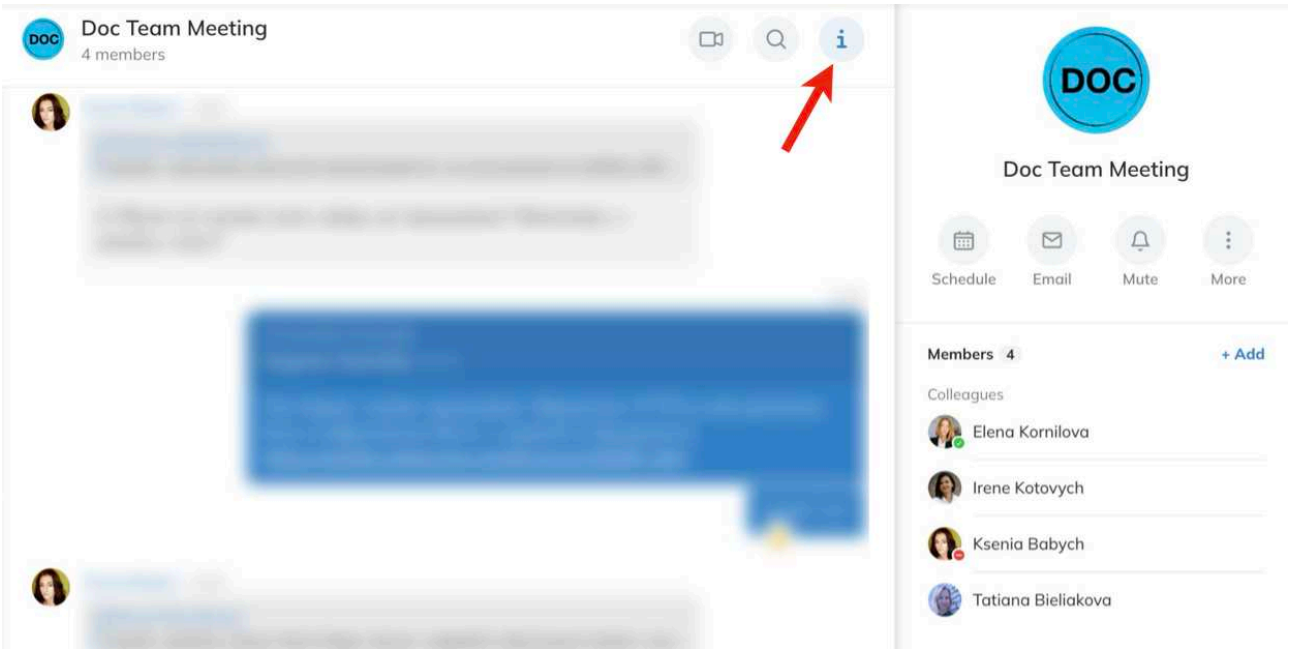


2. A screen informing that after image deletion your conversation avatar will be returned to the default one. Confirm deletion by clicking **Delete**



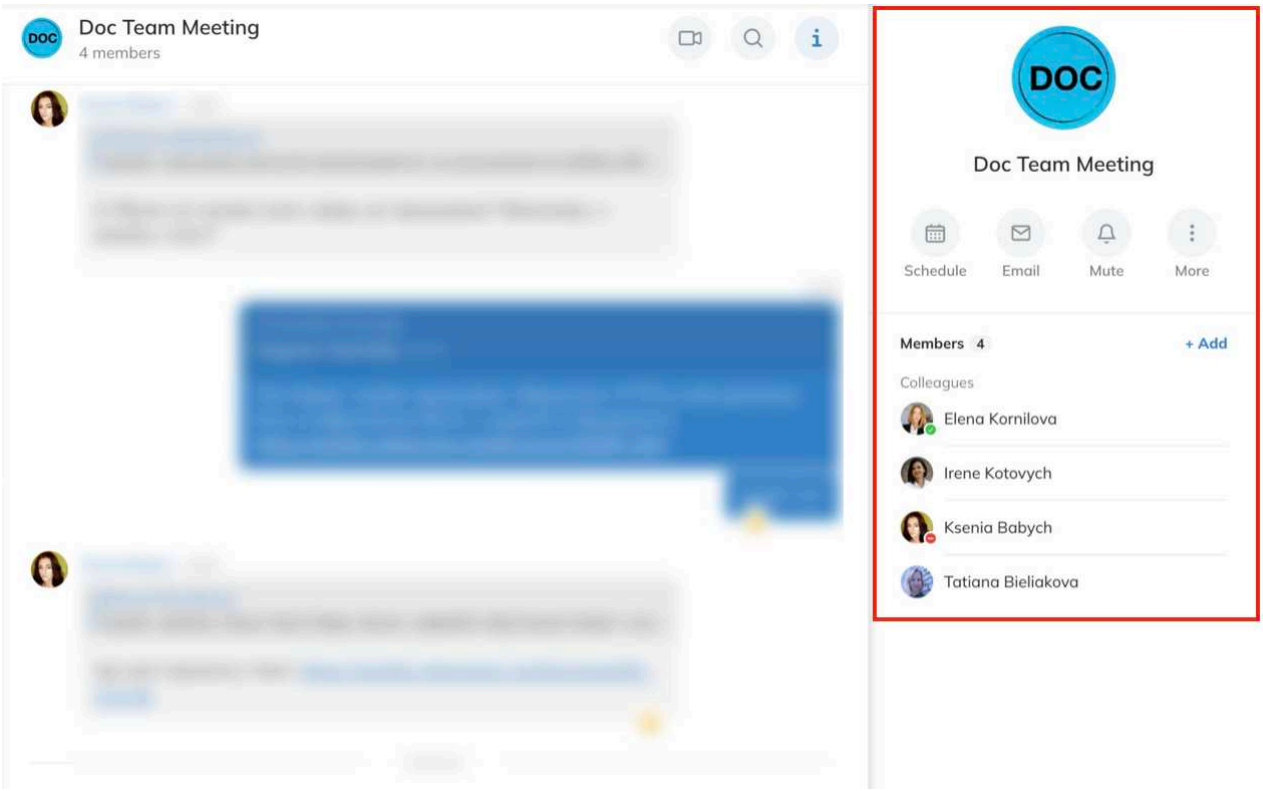
Manage a conversation

Click on the **Info** icon from the upper right-hand part of the screen to open the *Conversation Info* frame.



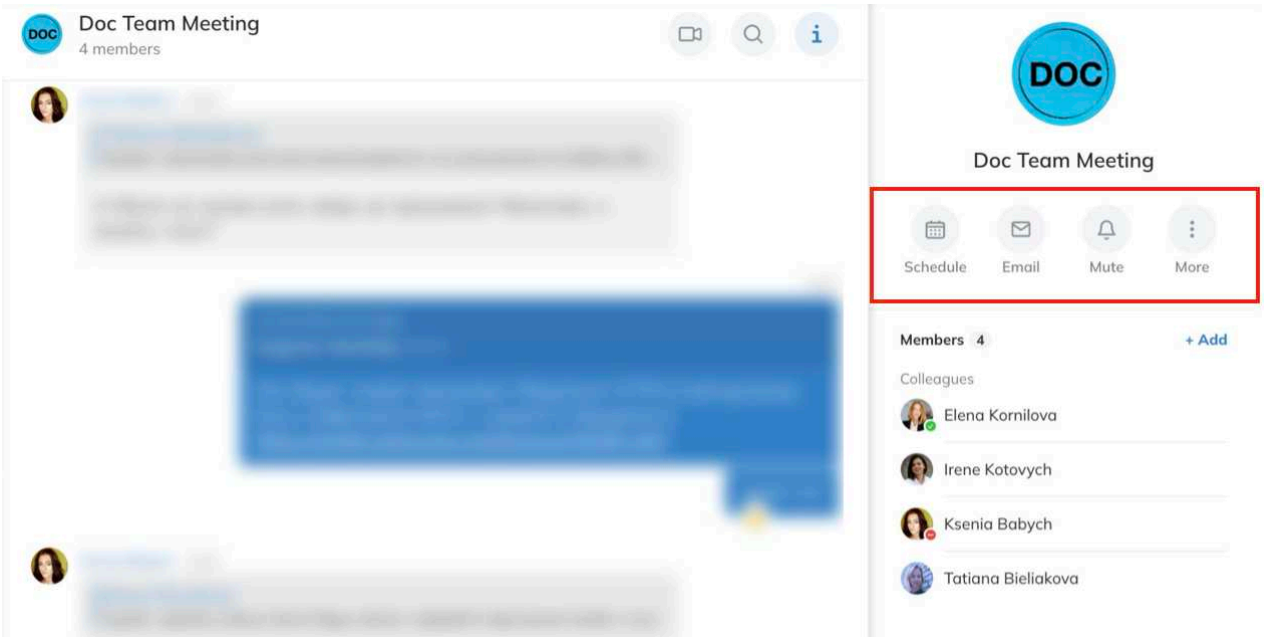
In this frame you can:

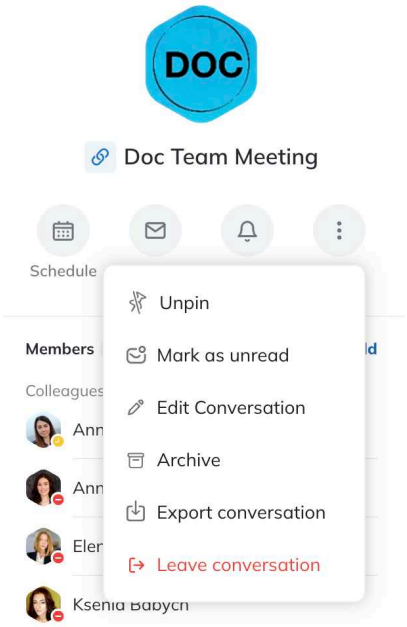
- View the list of conversation members
- Schedule an event
- Add more participants
- Delete member or Send email invitation to a member
- Mute the conversation for a period of time
- And more



Under the Conversation avatar and conversation name, you can find the following buttons:

- **Schedule**: calendar opens enabling you to schedule a conference in the participants' calendars
- **Email**: your email client opens letting you send a customized email invitation to all the members
- **Mute**: lets to mute conversation for 1/ 2/ 4 hours or forever
- **More**: provides the options to Pin / Unpin, Mark as read / unread, Edit conversation, Archive it, Export conversation in .txt format or Leave conversation



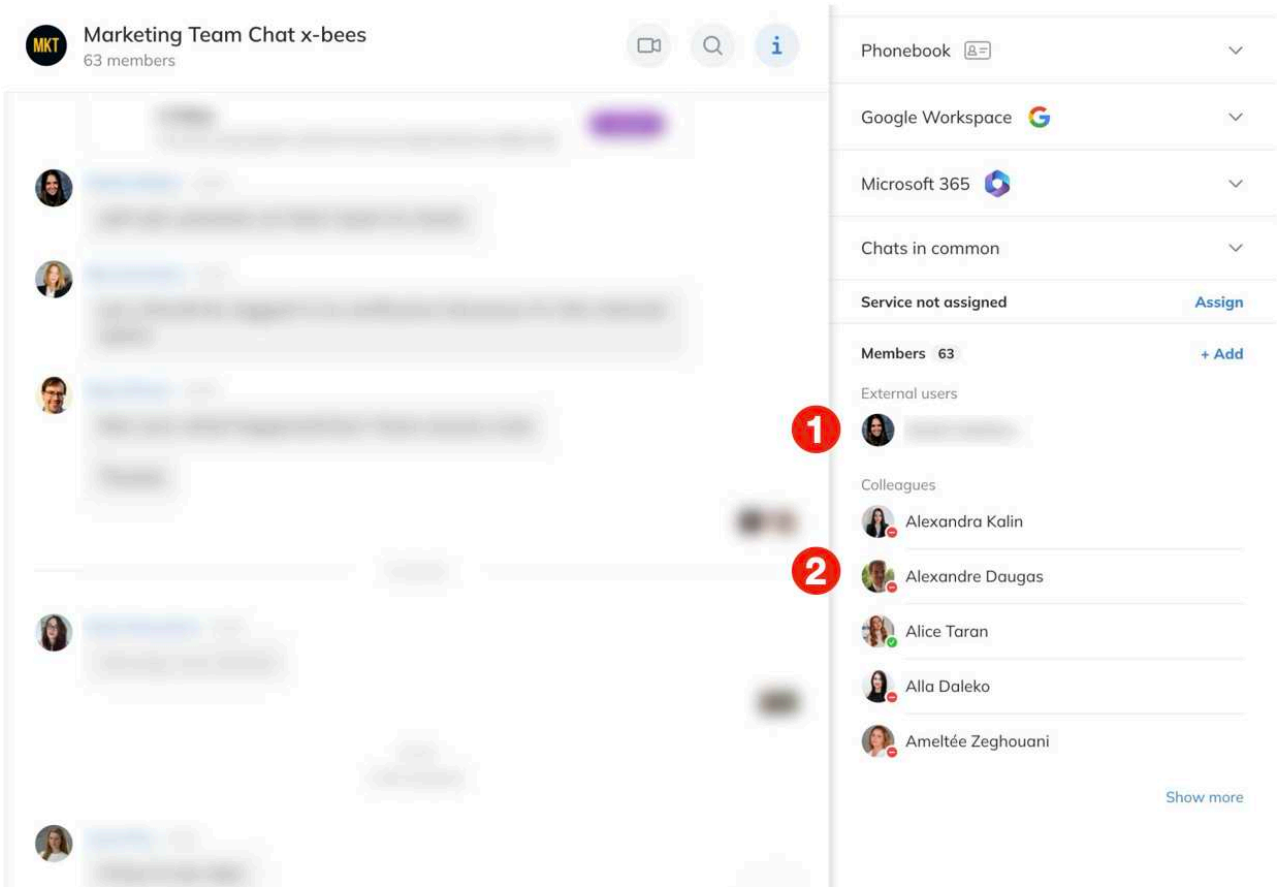


In case there are external members in the conversation, the Info frame displays the information about an external member first, and then the list of members.

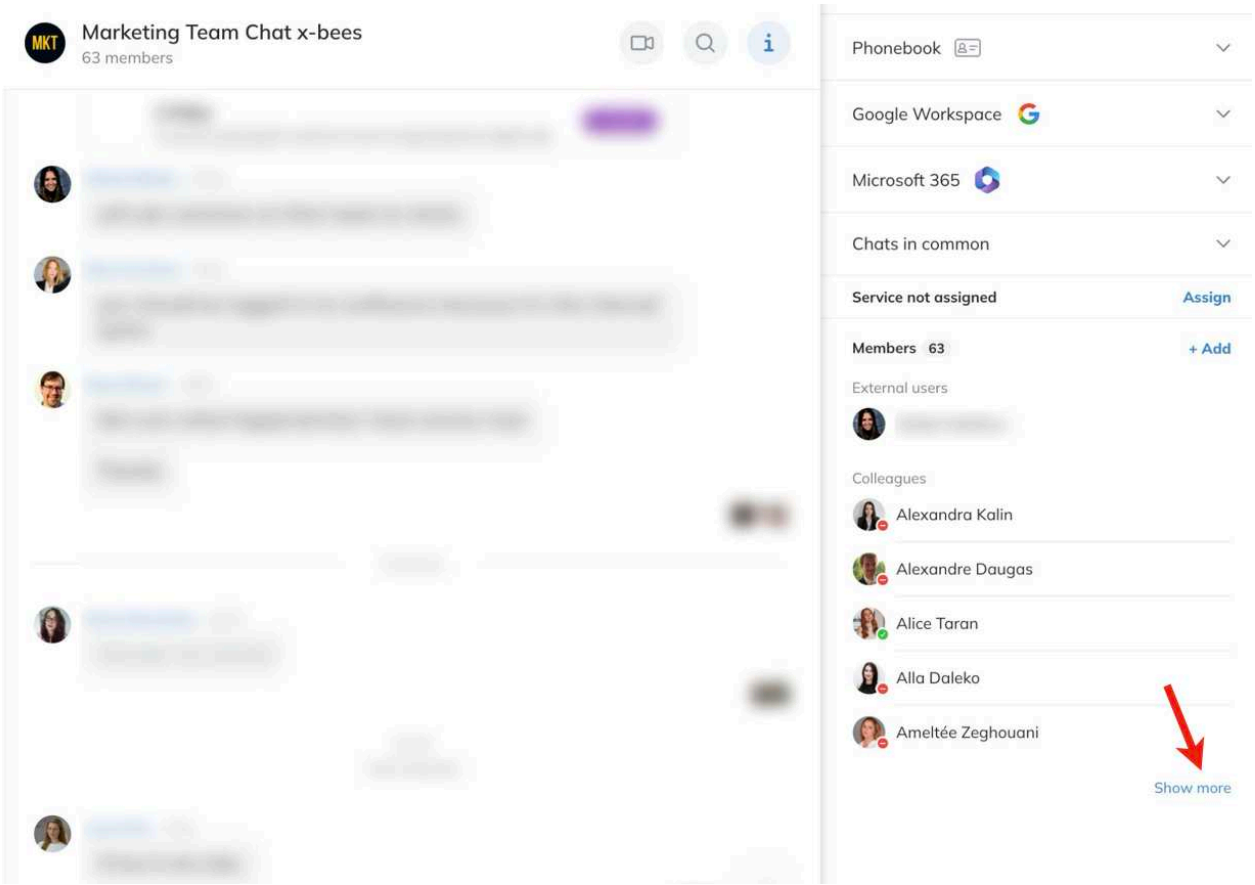
For group conversations with multiple external users, the external user to be displayed on the Info frame is selected randomly.

Members of the conversation

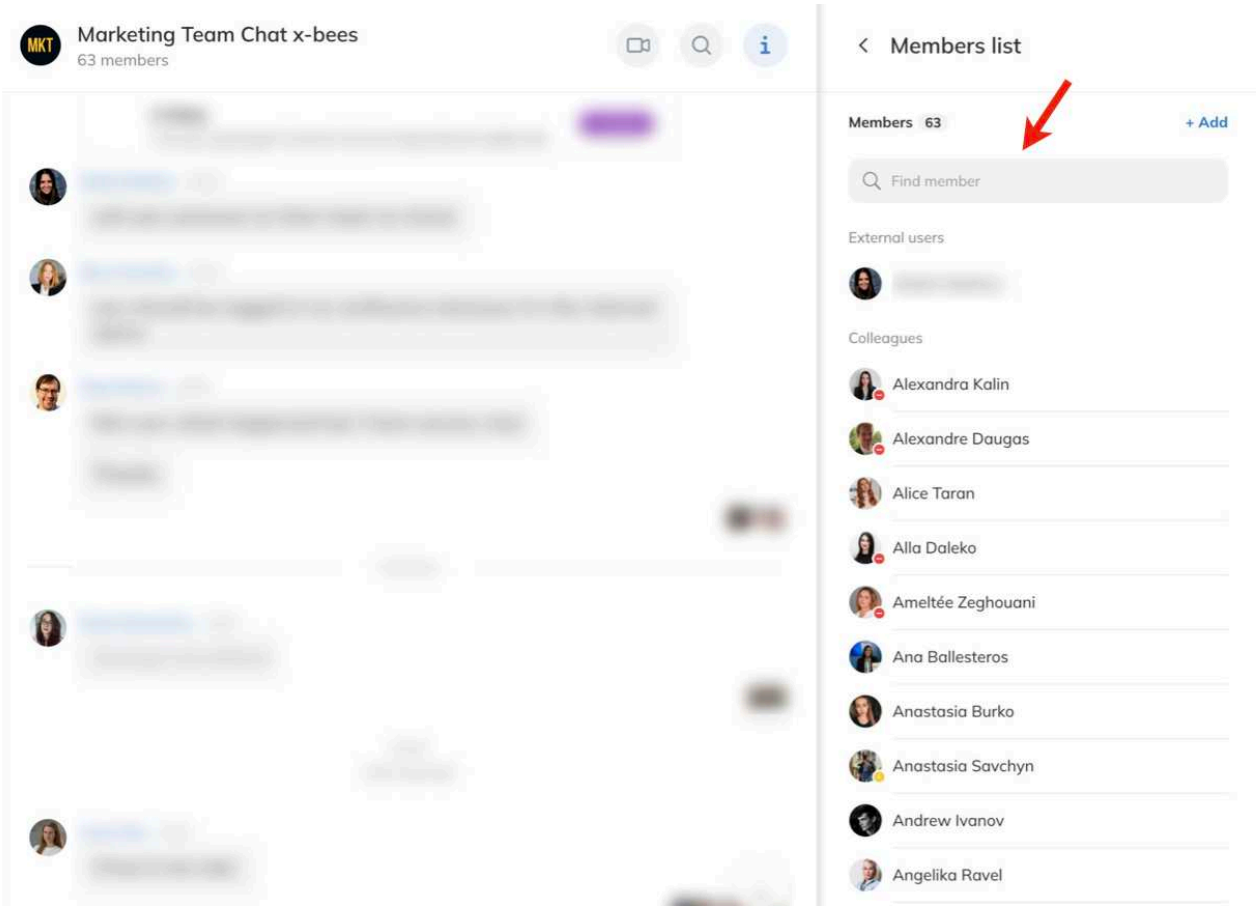
The list of members includes both external users and colleagues, displaying them separately, in the relevant sections - *External users* (1) and *Colleagues* (2).



To view the full list of users, scroll down to the bottom and click **Show more**:

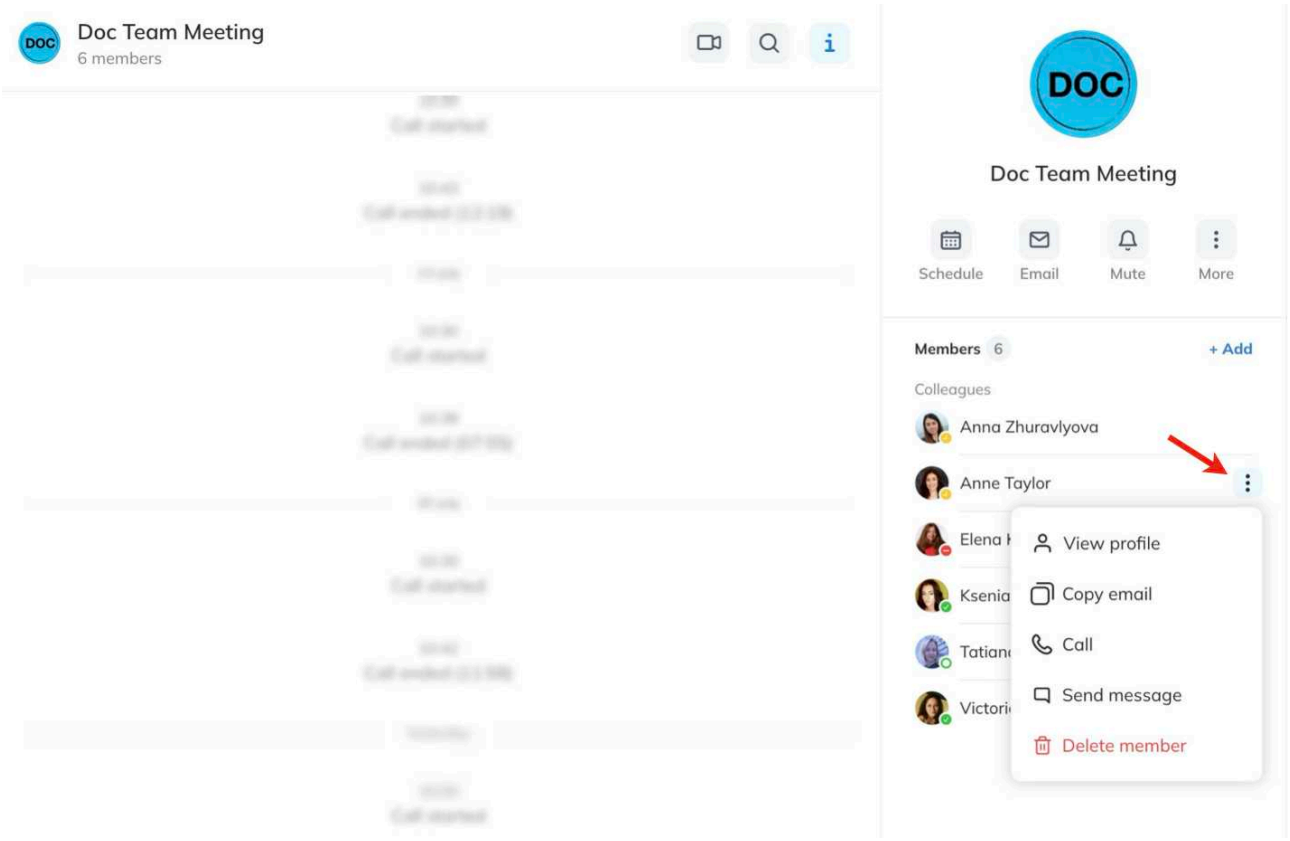


After clicking Show more, on the *Members list* panel, you can see the list of all members of the conversation, and use the *Search* field if required:



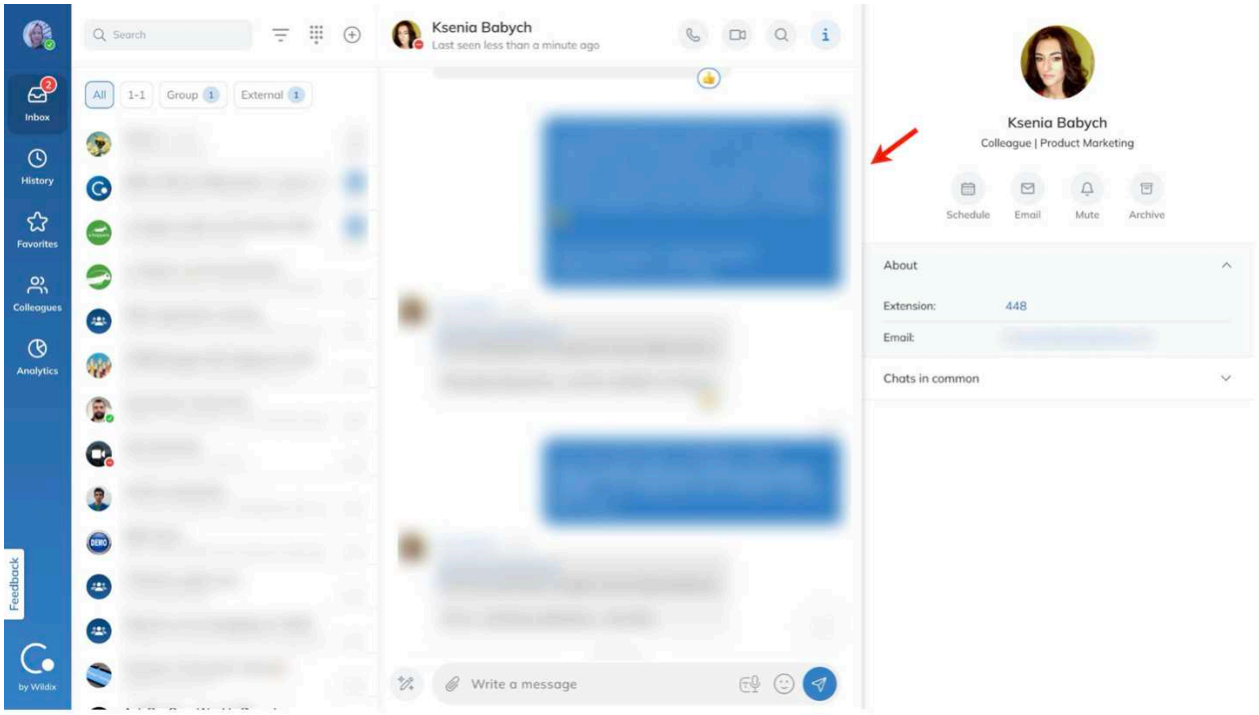
Clicking on the **More actions** button in front of the necessary member, you get the following options:

- *View profile*: opens user details on the Info frame
- *Copy email:* copies the member's email address to the clipboard
- *Call:* starts a call with the selected member
- *Send message*: opens one-on-one chat with the member
- *Delete member*: deletes member from the conversation



Customize Info frame size

You can customize the size of the Info panel just by hovering the mouser over the Info panel border and dragging it to the necessary position:

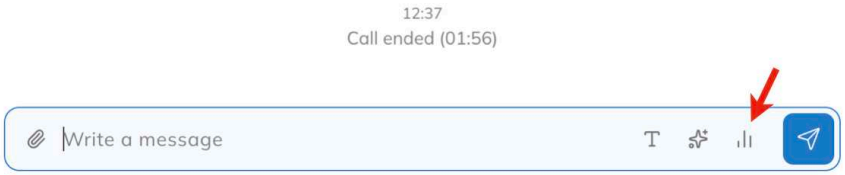


The customized Info frame size is preserved when you switch to other conversations or when a call or conference starts.

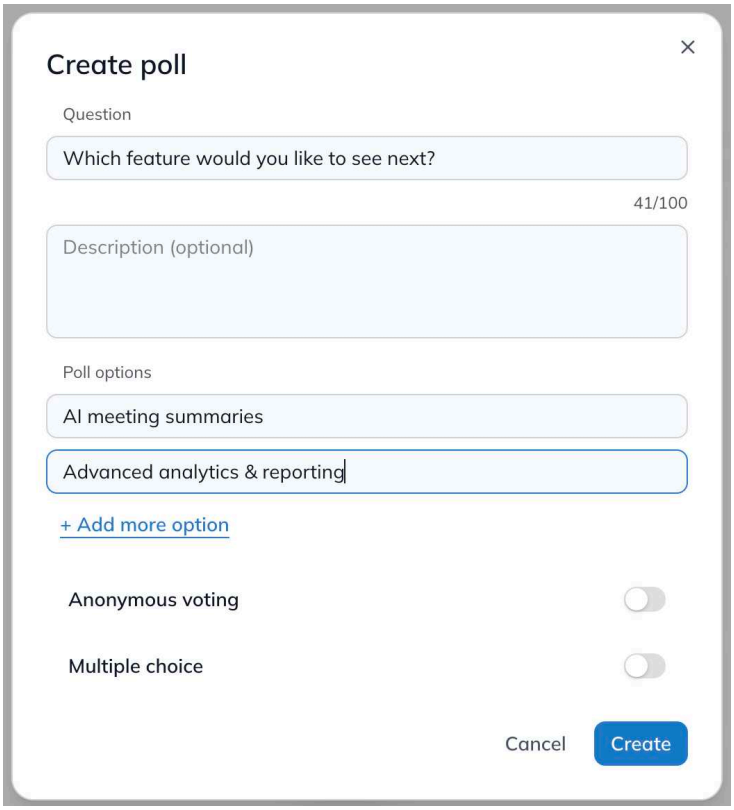
Create Polls

You can create polls in group chats, allowing teams to quickly gather feedback and make collective decisions.

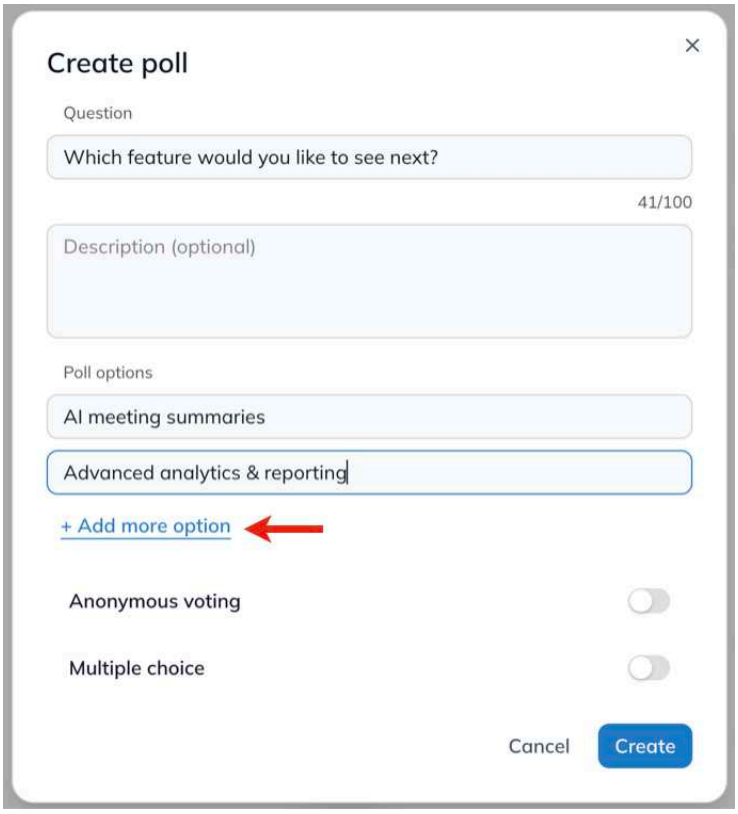
1. Click the **Create poll** button in the message composer bar:



2. Enter the question, description (optional), and poll options

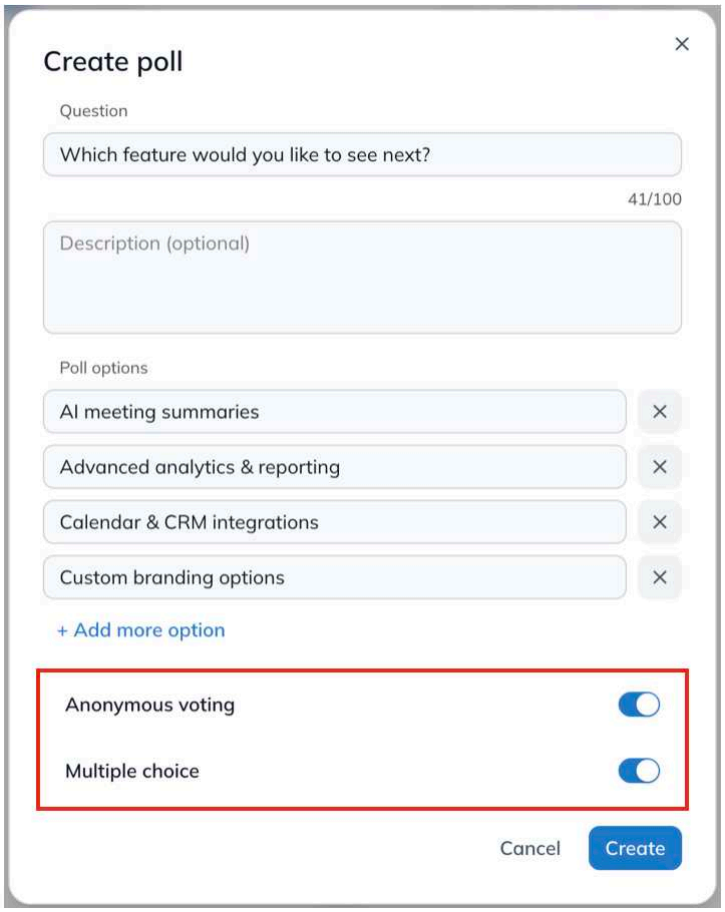


To add more options, click **Add more options**:

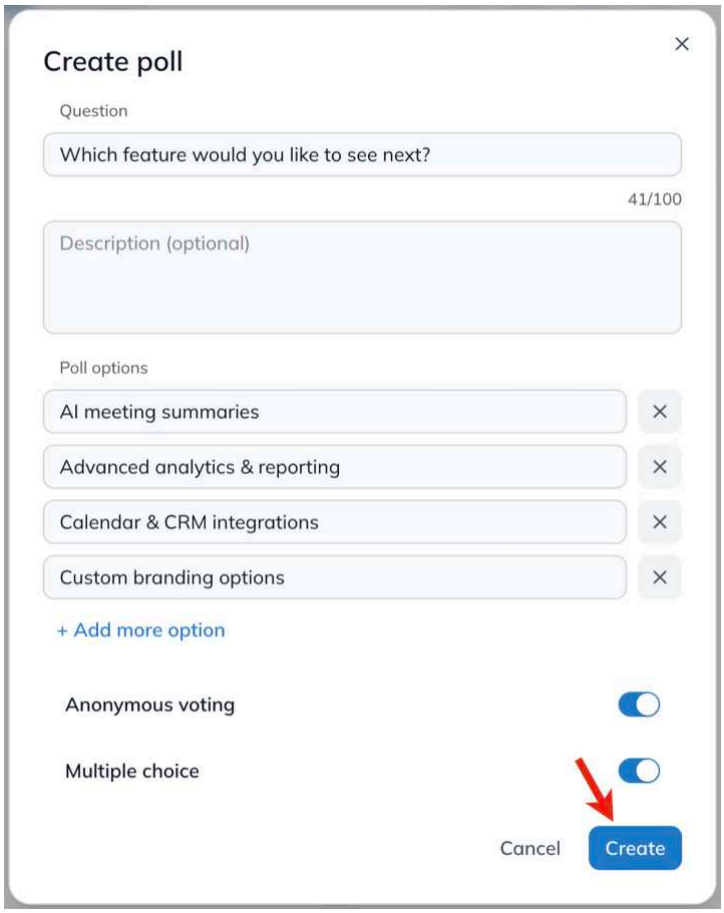


Note: You can enter up to 10 options.

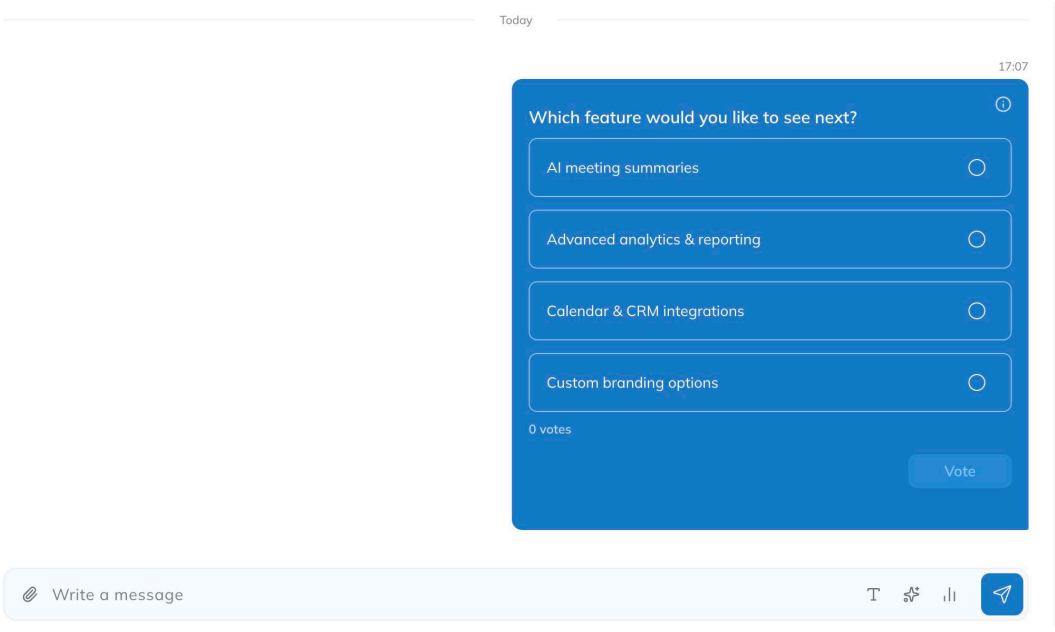
3. If needed, enable the **Anonymous voting** and **Multiple choice** settings:



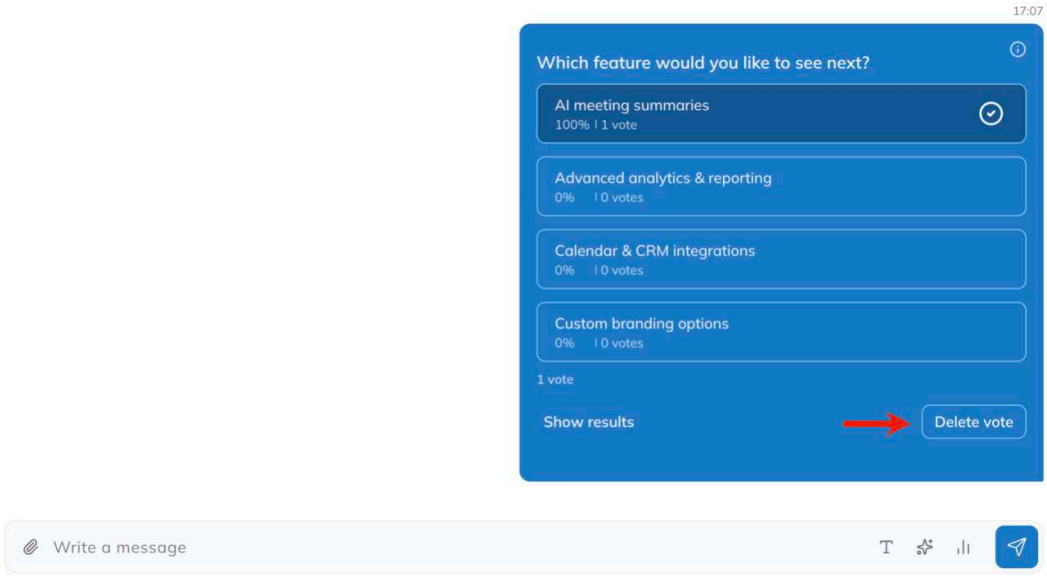
4. When done, click **Create**:



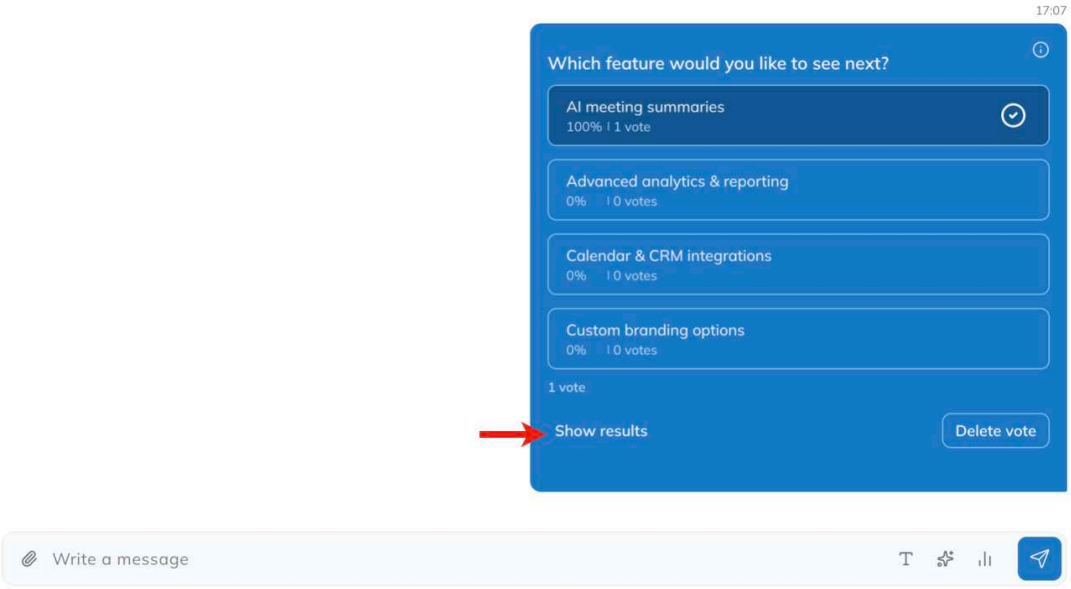
The poll is displayed in the conversation:



Participants can vote for their preferred option. To delete a vote, click **Delete vote**:



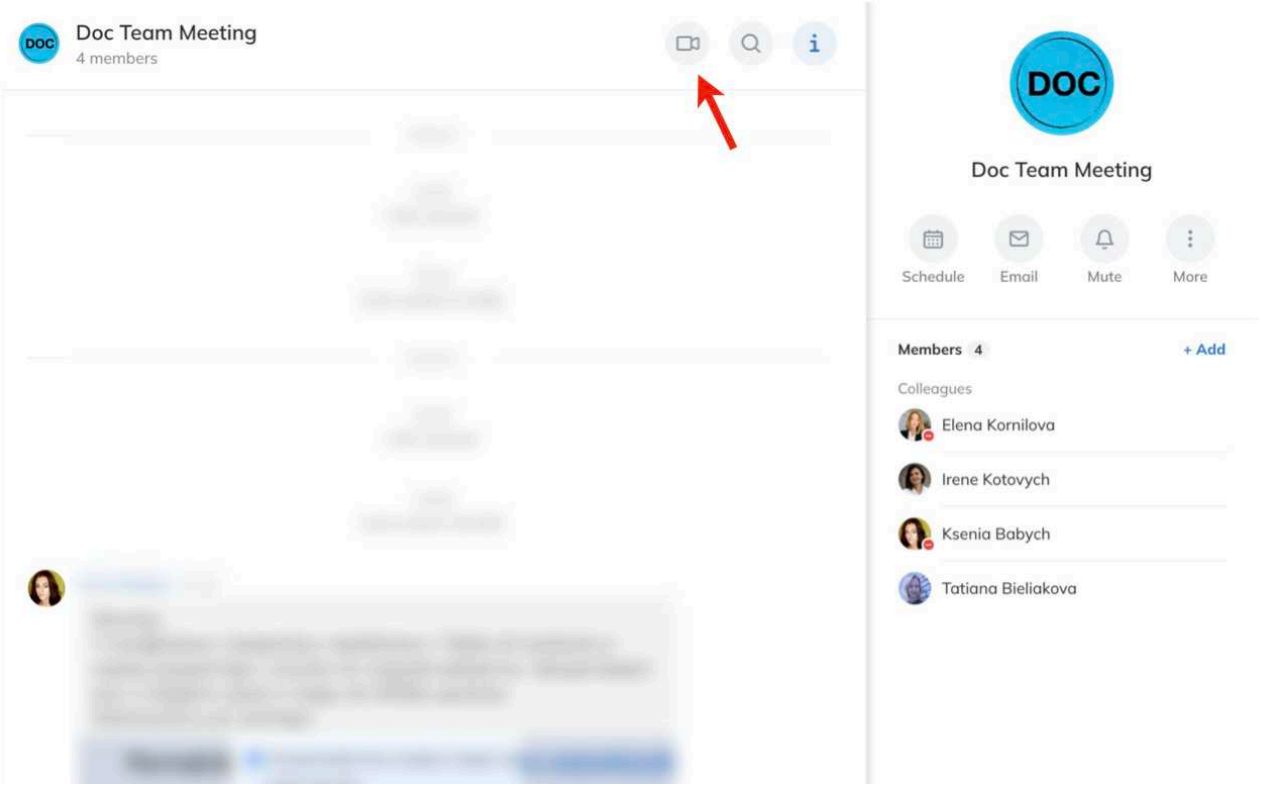
You can click **Show results** to see the poll outcomes:



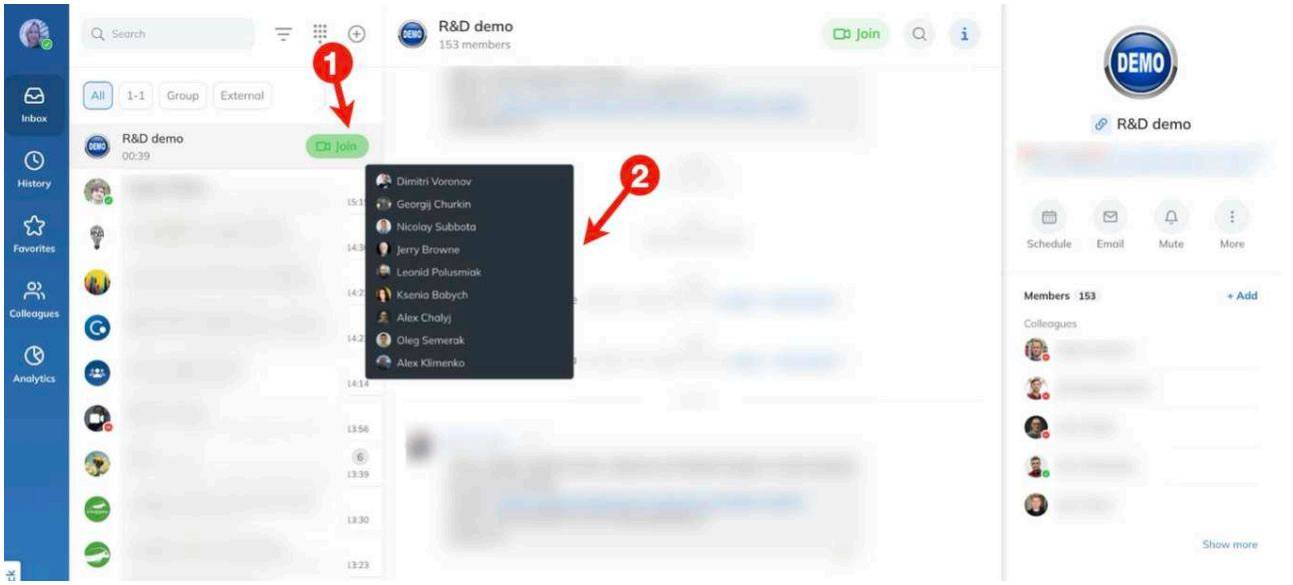
One-on-one conversations

Start a conference or schedule an event

- **Start a call with all the participants**: click on the **Video** icon from the upper right-hand part of the conversation screen



Participants of the conversation can see the green **Join** button next to the conversation name on the left side panel and can join the conference by clicking the button. Hovering a mouse over the **Join** button (1), there is a popup window with the list of users participating in the conference (2). When a conference starts, participants are notified with a sound notification.



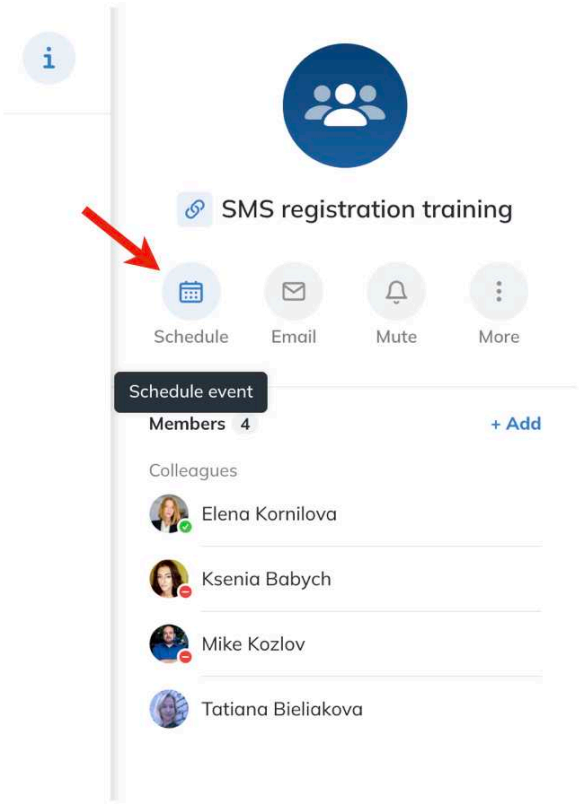
For conference functionality and how to use it, check out the guide Videoconference in x-bees and Collaboration 7 .

Notes:

- The maximum number of participants displayed is 10
- The list of participants isn't updated while you are viewing it. To update the data, move the mouse outside the button and hover it again
- Notification is played once, for 7 seconds, unless user opens Inbox. Notification is played even to users with DND/ Away presence status
- Notification is not played if:
  - user has an active call or conference
  - user is on the Inbox tab
  - Collaboration 7 tab is closed
- If there are several simultaneous calls, the notification is played one time

Schedule event via Google/ Microsoft:

1. Click on the **Info** icon from the upper right-hand part of the conversation to open the *Conversation Info* frame
2. Click on the **Schedule** button: calendar opens enabling you to schedule a conference in the participants' calendars



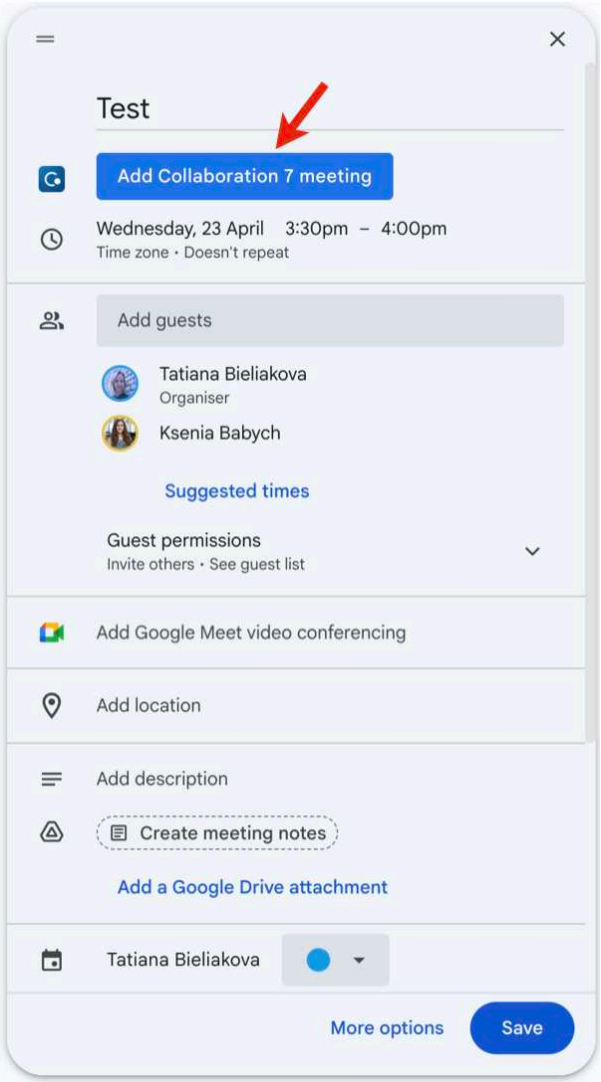
Schedule event in Google/ Microsoft 365 calendars

It is also possible to schedule meetings right in Google/ MS 365 calendars. When creating an event in Google/ MS 365 calendar, click **Add Collaboration 7** meeting button:

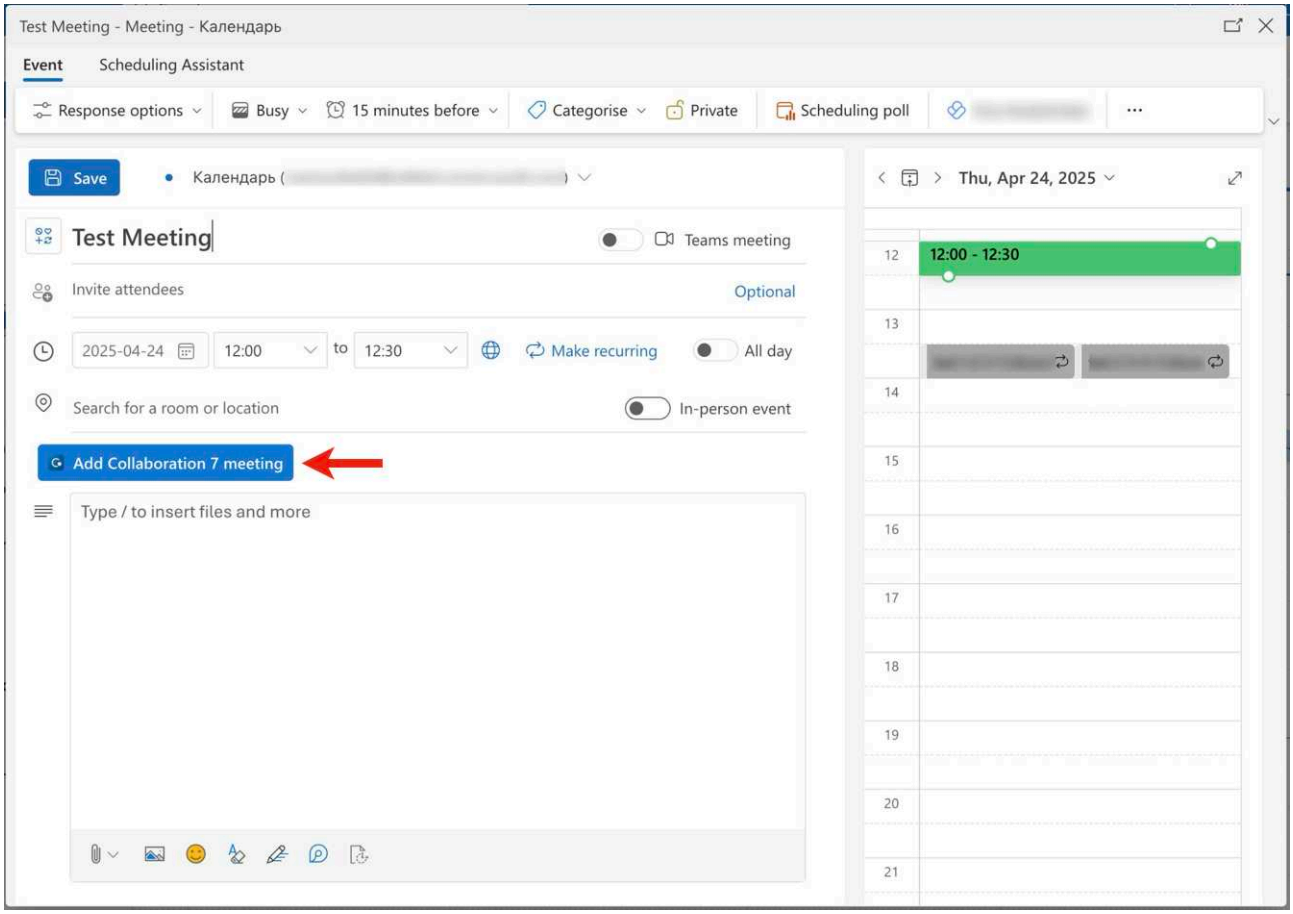
Requirements:

- Collaboration 7 Chrome extension
- Collaboration 7 running in Chrome or as a desktop app
- min. WIService v. 3.19.4

Google:

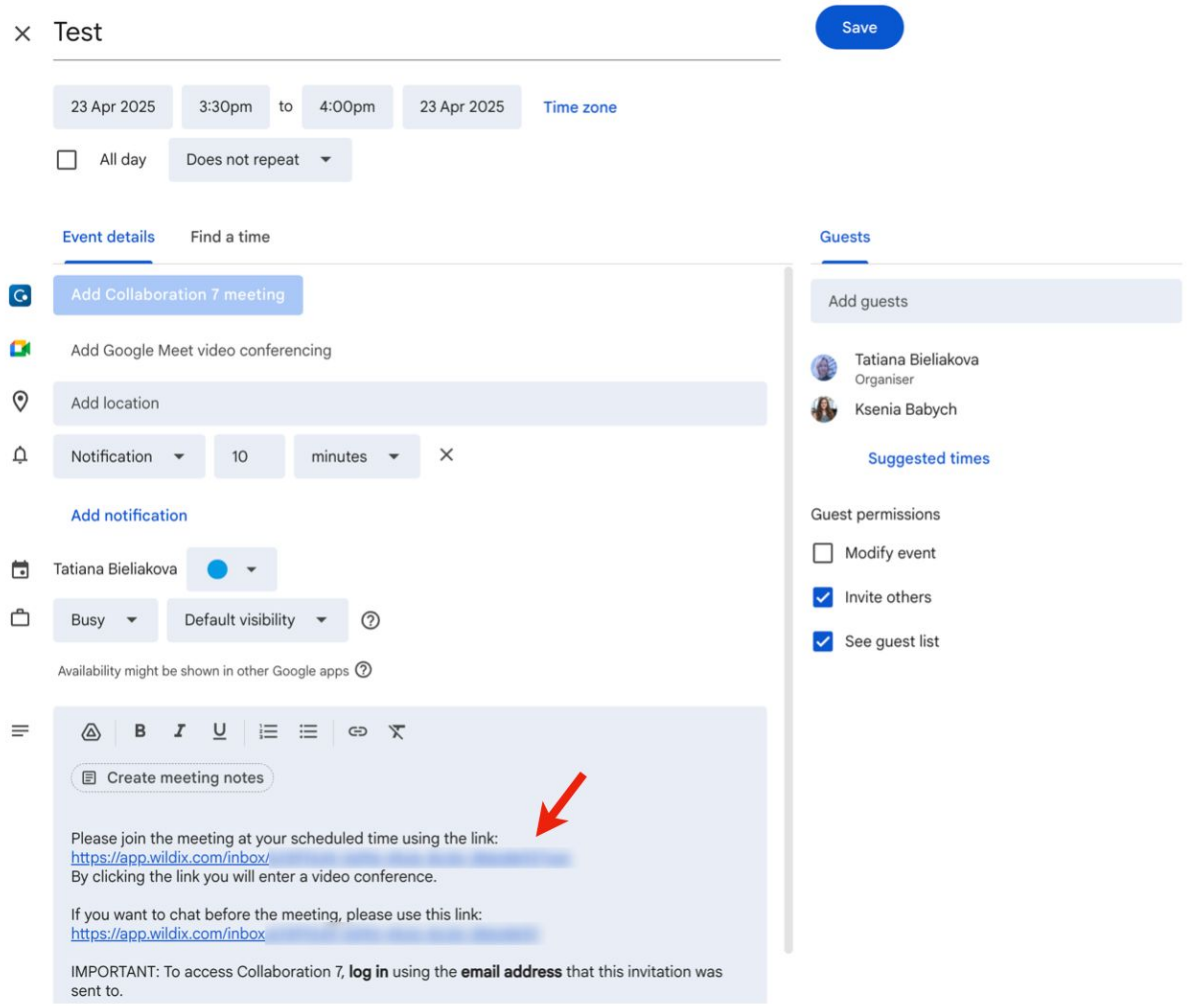


Microsoft 365:

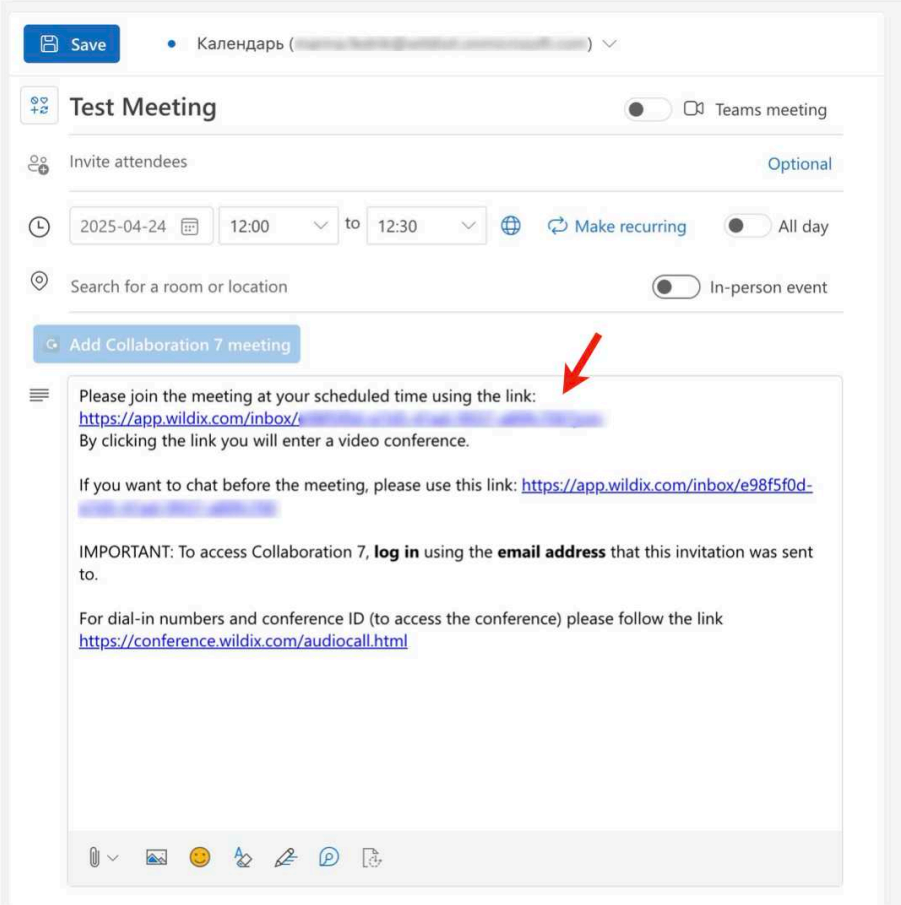


Link to Collaboration 7 conversation is automatically added in the event description:

Google:



Microsoft 365:



Add participants and save the event. When the event is saved, a dedicated conversation with the added participants is created in Collaboration 7.

Participants can join a meeting in any of the following ways:

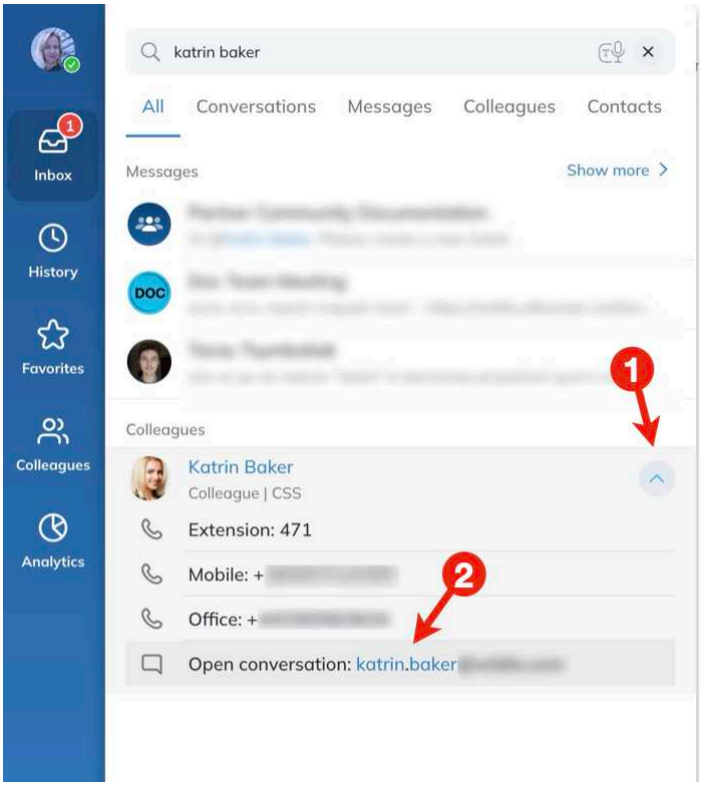
- via the link sent in an email invitation
- by clicking "Join Collaboration 7 meeting now" in the relevant calendar event
- directly in Collaboration 7 conversation

One-on-one conversations

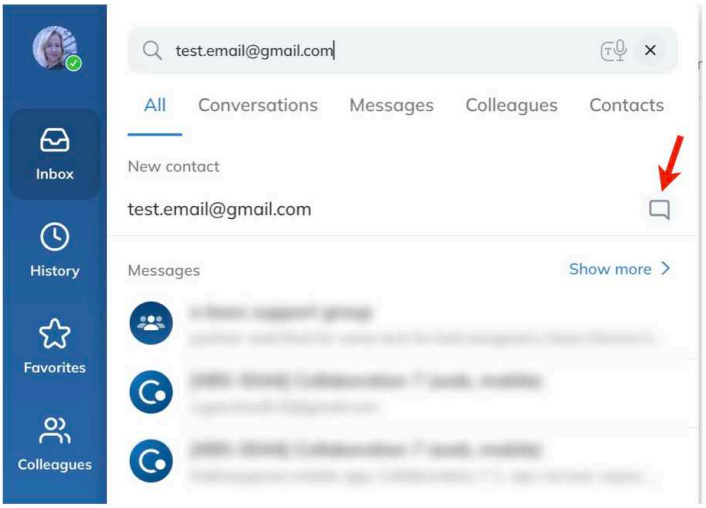
In Collaboration 7 you can start a one-on-one conversation with any match found in the Search field. It can be a colleague, a phonebook contact, or any external person present in your conversations.

1. Start typing a name, phone number, or email into the Search field in the upper left-hand part of the screen
2. Click on the match to open a conversation

When you click on the arrow icon (1) next to the contact found, you can see the contact's details (extension, phone numbers), as well as have possibility to open conversation (2):

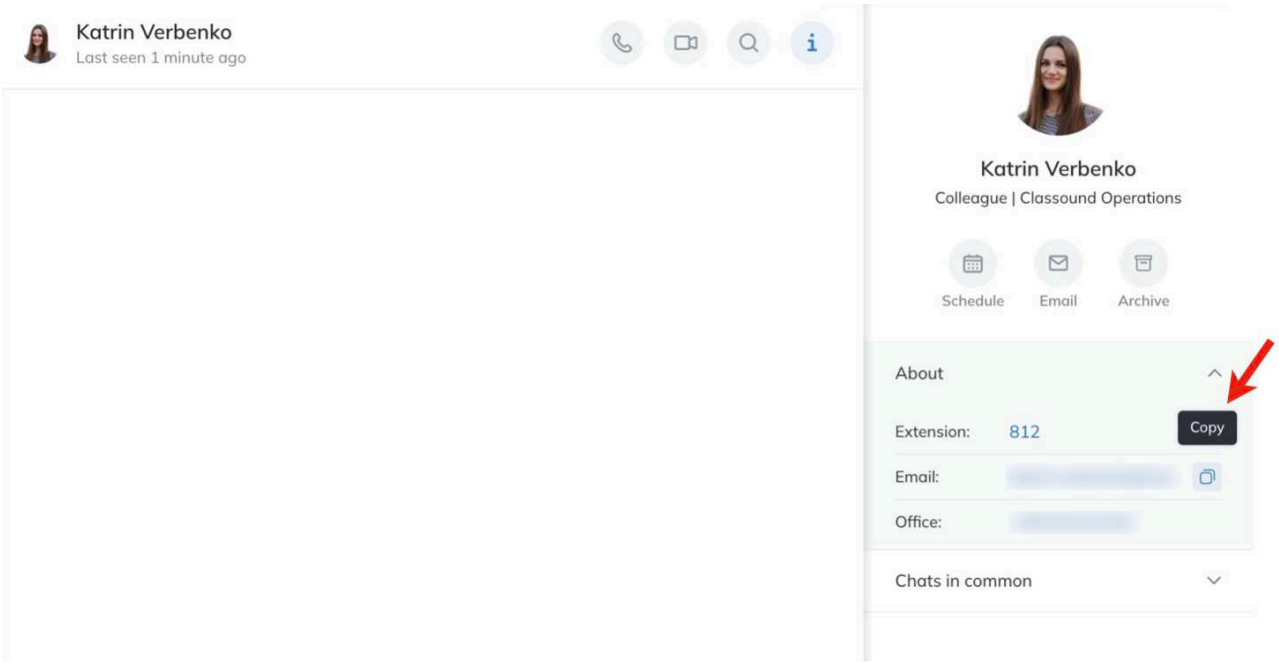


If you enter email and the contact is not found, you can click on the conversation icon to start conversation with the user:



Note: The ability to mute the chat/ Other actions appears only after you have exchanged the first chat.

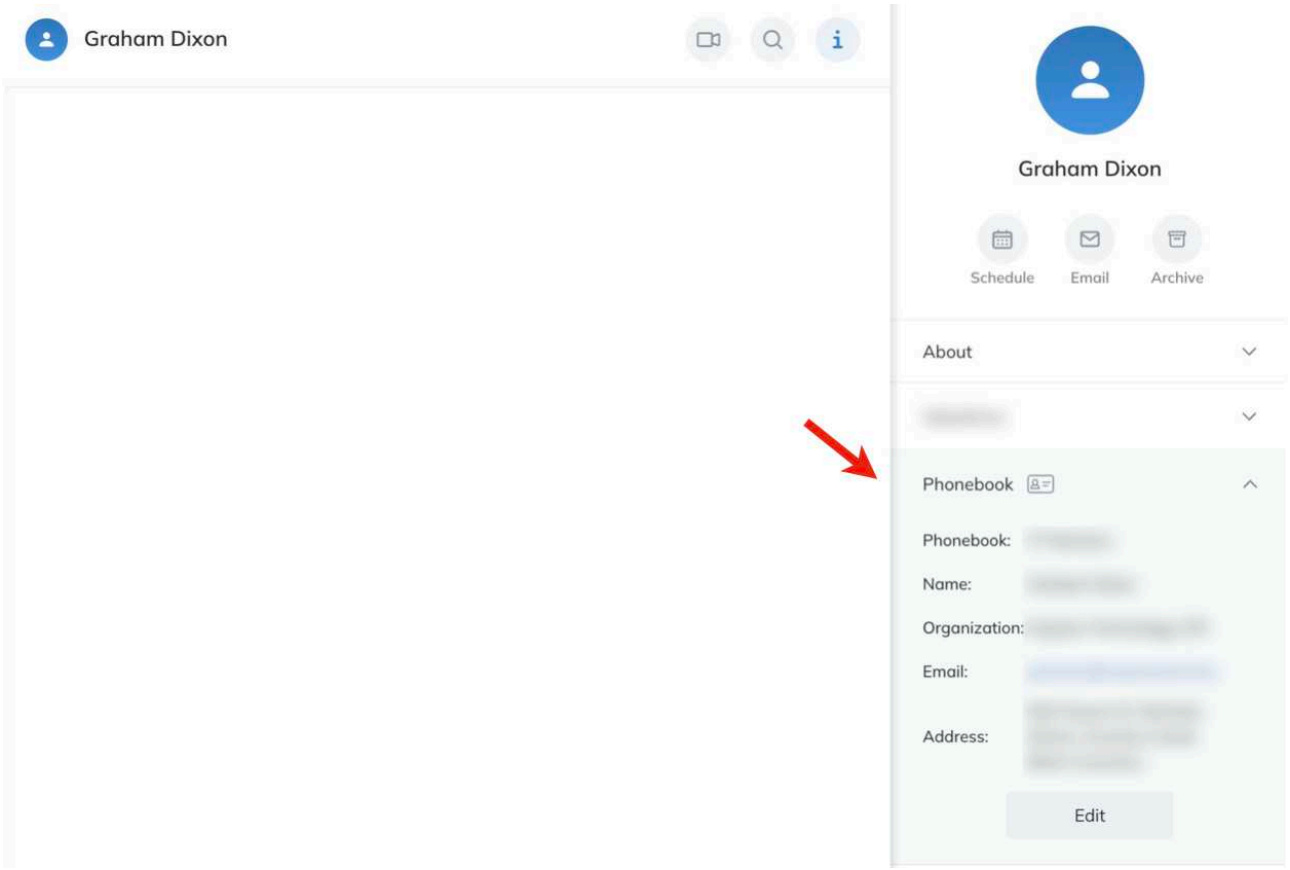
If you need to copy any user information (e.g. extension, email), hover the mouse over the relevant field and click on the **Copy** icon:



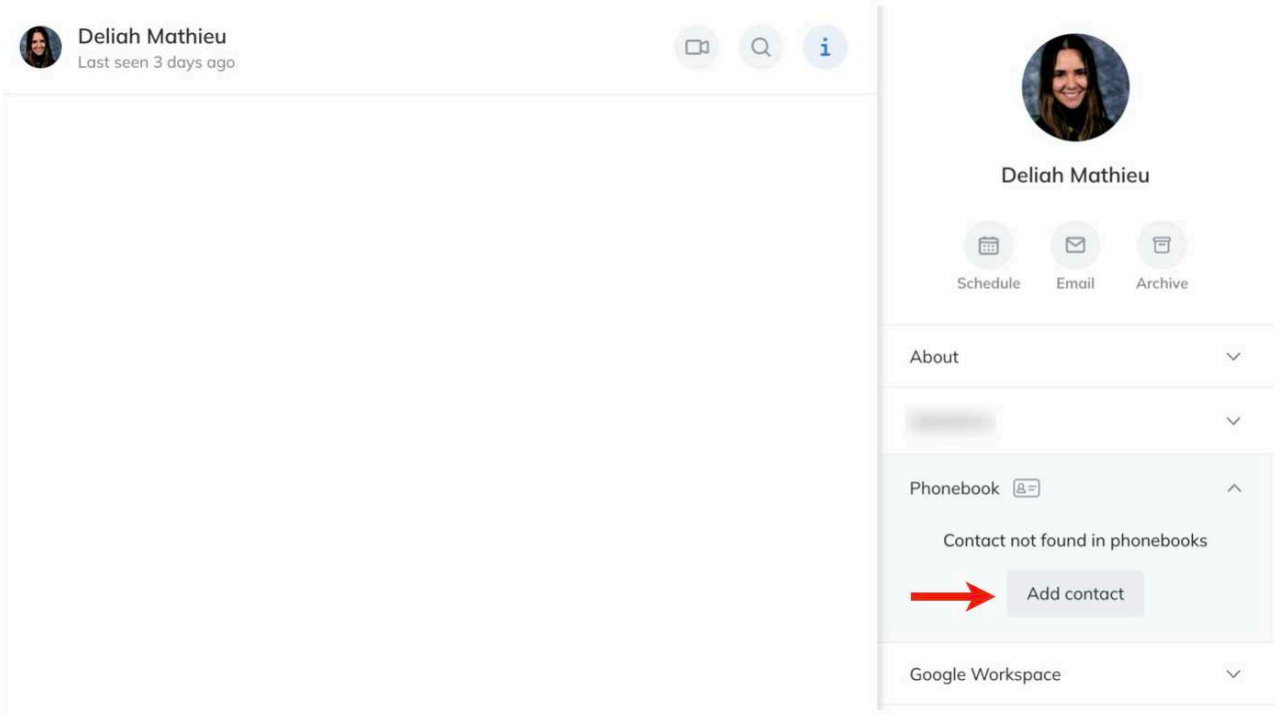
In case the contact is found in phonebooks, you can find it in the relevant *Phonebook* section on the Info frame:

Note:

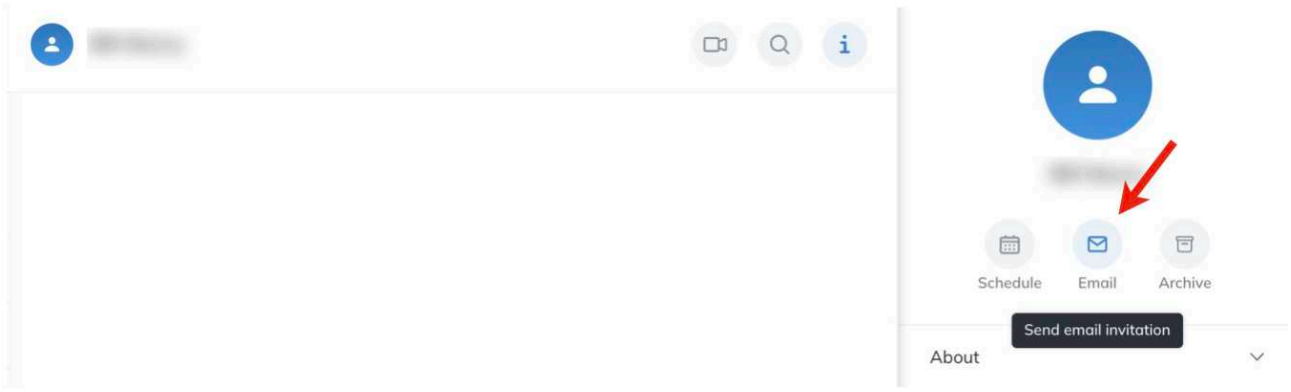
- Phonebook integration is enabled by default.
- Phonebook section includes such fields as Name, email, mobile, address, etc., and lets to edit a contact or create a new one. In case of adding/ editing a phonebook contact via Collaboration 7, the changes are synced with the Phonebook.
- For a contact to be added to a Phonebook, it is necessary to add phone number or email.



If the contact is not found in Phonebooks, you can create a Phonebook record by clicking **Create Contact**:



If it is not a PBX user, then you need to invite this person to Collaboration 7. They will receive the invitation via email and then they will be able to join your conversation in Collaboration 7:



Generative AI Bot response rules

The AI Chat Agent response behavior depends on the type of conversation and its participants.

Simple group chats:

- In a group chat where only the user and the Generative AI bot are participants, the bot responds to user messages without requiring @mention or Quote
- After adding additional participants, the bot continues responding until another participant sends a message in the chat. After that, the bot responds only when explicitly mentioned via @mention or when replying to the bot's message using Quote

- In group chats created with three or more participants, where one of the participants is a Generative AI bot (or when a Generative AI bot is added to an existing chat with other participants), the bot responds only when explicitly mentioned via @mention or when replying to the bot's message using Quote

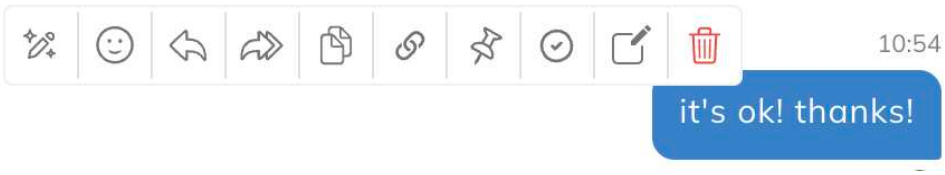
Kite chats:

- If a Kite chat has only two participants and one of them is the bot, the bot always responds, regardless of whether the other participant is an internal or external user
- If another internal user from the same organization as the bot is added to the chat, the bot responds to same organization users only when explicitly mentioned via @mention
- If an external user is added to the chat, the bot continues responding to that external user normally without requiring @mention or Quote

Conversations features: reactions, quote, forward, pin, select, edit, delete, tagging, file sharing

The features described below are available both in one-on-one and in group conversations.

Hover the mouse over a message to view the available options (options are described from the left to the right):



- **AI Asistant:** see details in the documentation How to use AI Assistant
- Leave a **reaction**
- **Quote**: respond to a particular message
- **Forward**: forward a message to another conversation. When you forward a message, 10 most recent conversations are displayed as initial search results on the forward message modal.
  When clicking on a forwarded message, you jump to this message in the relevant conversation, in case the conversation is public (available by link). You can also select multiple messages to forward at once. To do so, click the message menu, select one or more messages, then click **Forward**, select a recipient or group, and click **Send**.
- **Copy**: copy a message
- **Copy link**: copy link to the message (available only for PBX users, guests cannot copy message links)
- **Pin**: pin the message (available only for PBX users, guests cannot pin messages)

> Note:
> - The pinned messages feature is not available for conversations started via Chat link or website widget.
> - To unpin a message, hover the mouse over it and click *Unpin*.

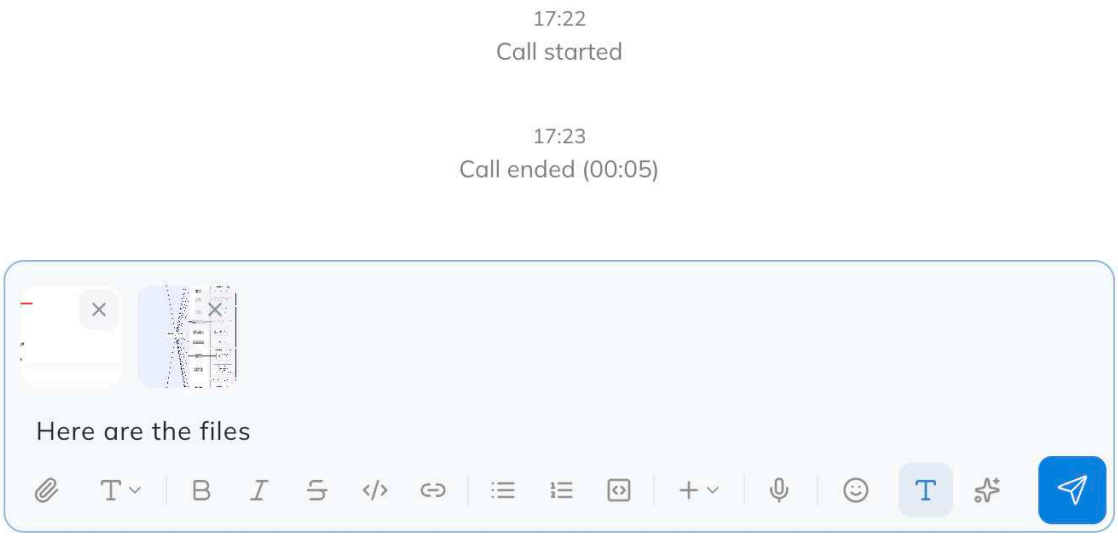
- **Select:** select a message (multiple messages can be selected at once)
- **Edit**: edit your message (available only for your messages)
- **Delete**: delete your message (available only for your messages)

Other conversation features:

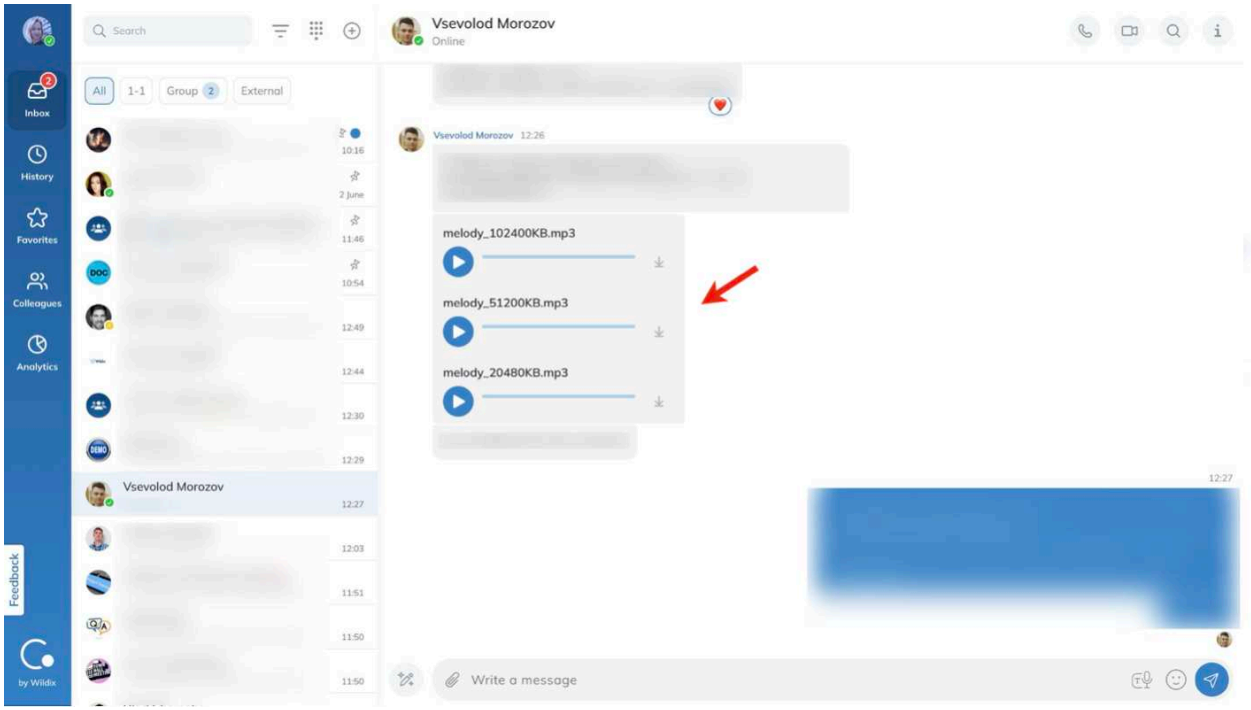
- **Tag a particular participant** in a conversation: type "@" and then select the participant to tag:



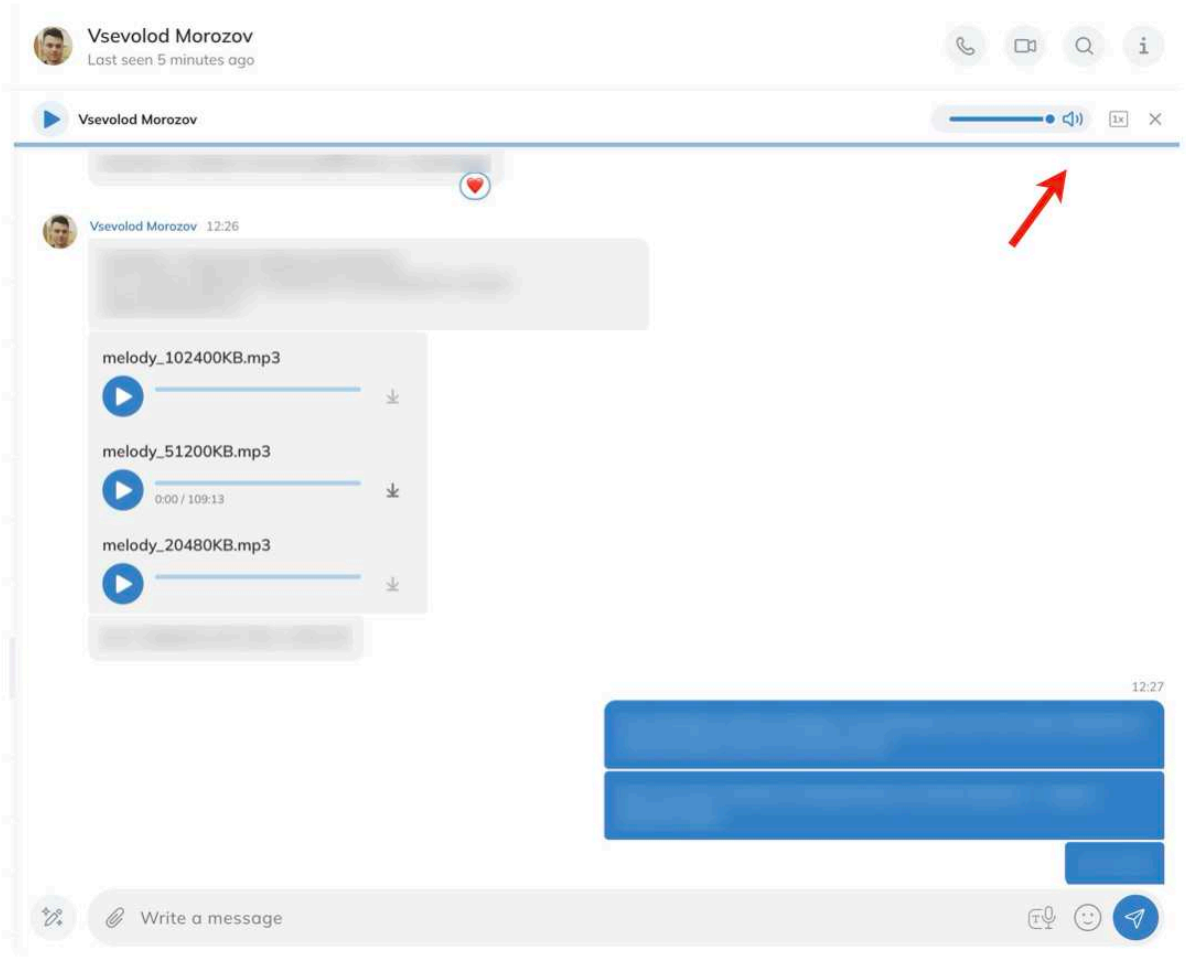
- **Send one more multiple files**: click on the paper clip icon from the input field or use drag and drop to add your files:



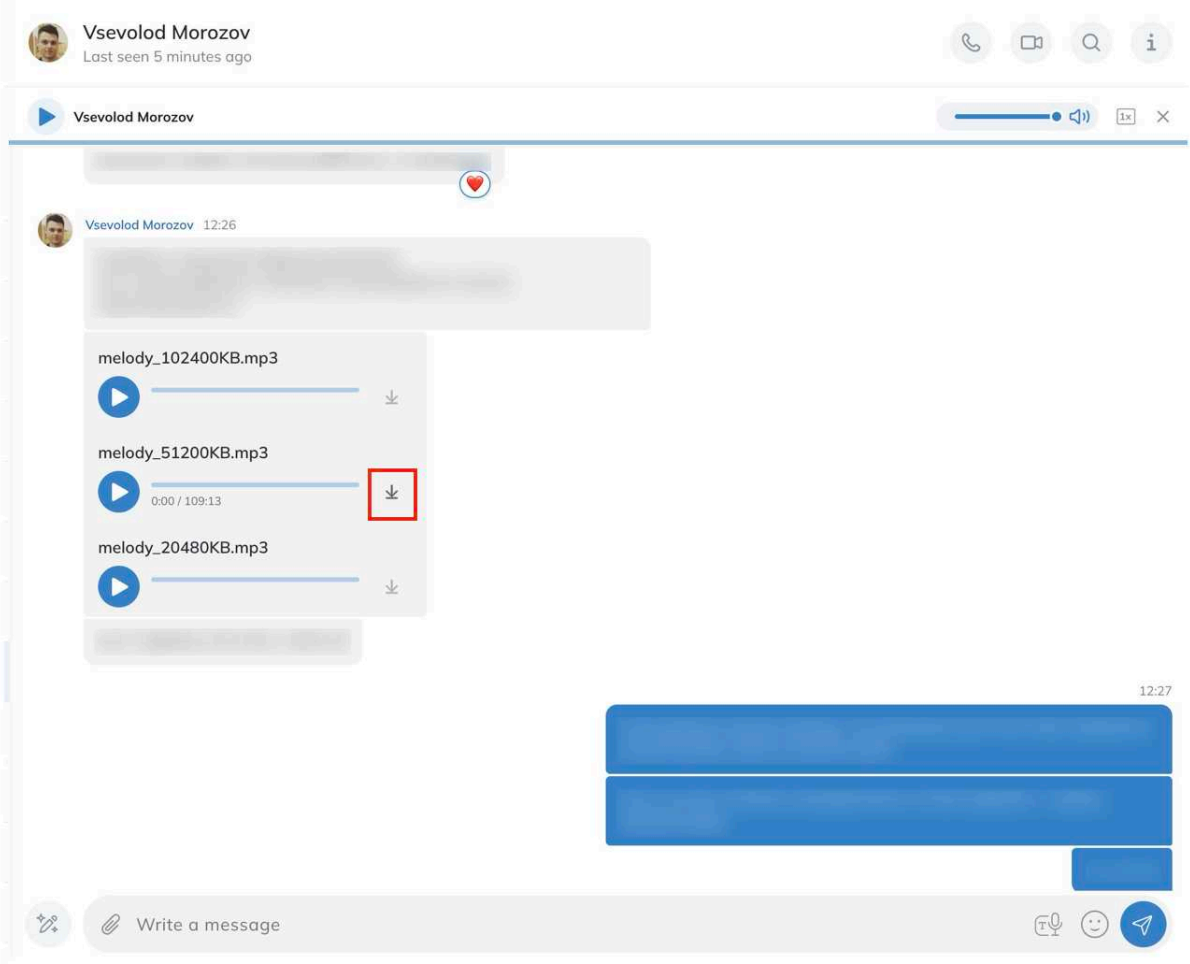
In case of sending audio files, they can be played right in Collaboration 7:



When playing an audio file, a playback control panel appears at the top of the conversation, where you can manage speed and volume or close the audio. The panel remains visible when switching to another conversation or on an incoming call, until it is closed.



If you want to download the audio file, click the download button:



Note:

- Playing audio is paused in case a conference starts or in case of a call.

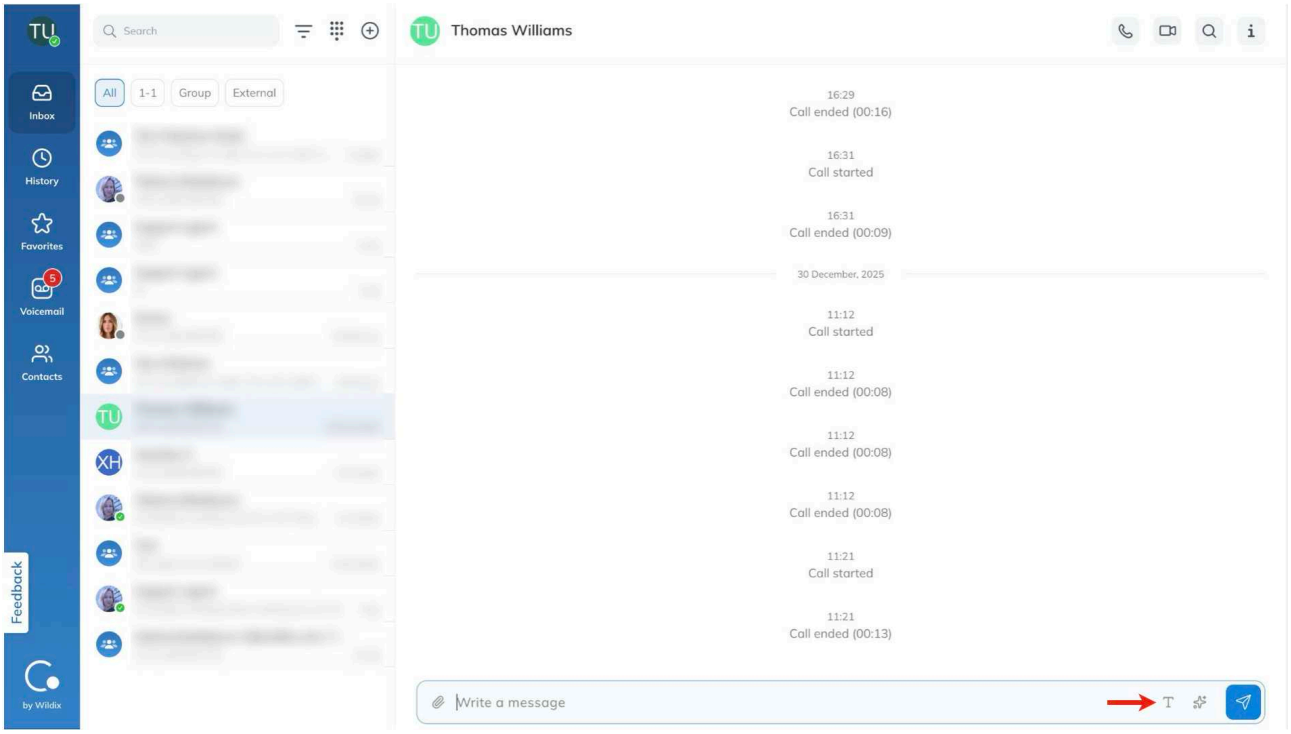
Limitation:

- The audio player may be interrupted in case of scrolling the conversation history too high.

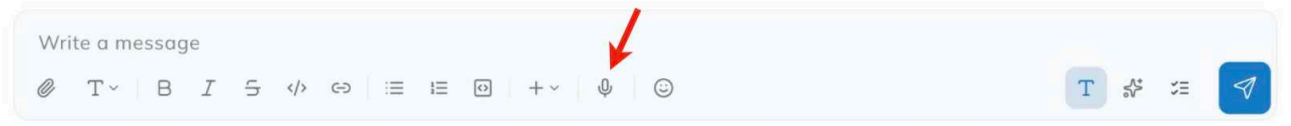
Note:

- Language for speech-to-text recognition corresponds to your browser language and is taken from browser Settings -> Preferred languages.
- The timeout after which the speech-to-text feature is deactivated if there is no audio input is the following:
  - Search field: 5 sec
  - Message input field: 15 sec
- When the Speech-to-text button is active, the message input field is deactivated, to avoid reordering of text in case of accidental clicks on the input field.
- For SMS, if the recognized text exceeds the SMS text limit of 670 characters, the text is cut to the allowed text size. Once the limit is reached, the Speech-to-text button is disabled.
- Firefox browser is not supported.

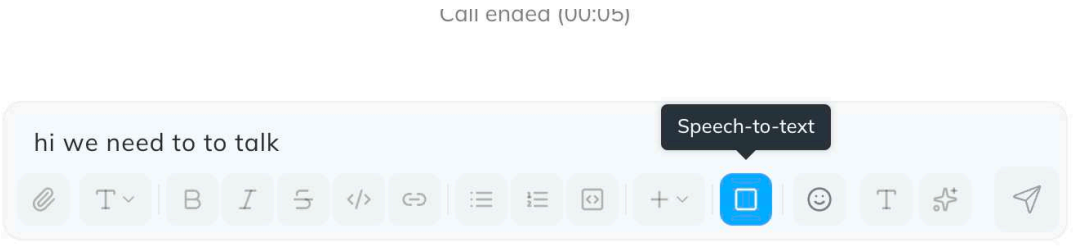
- **Use Speech-to-text feature**: click on the **Format** button in the message input field to expand the options:



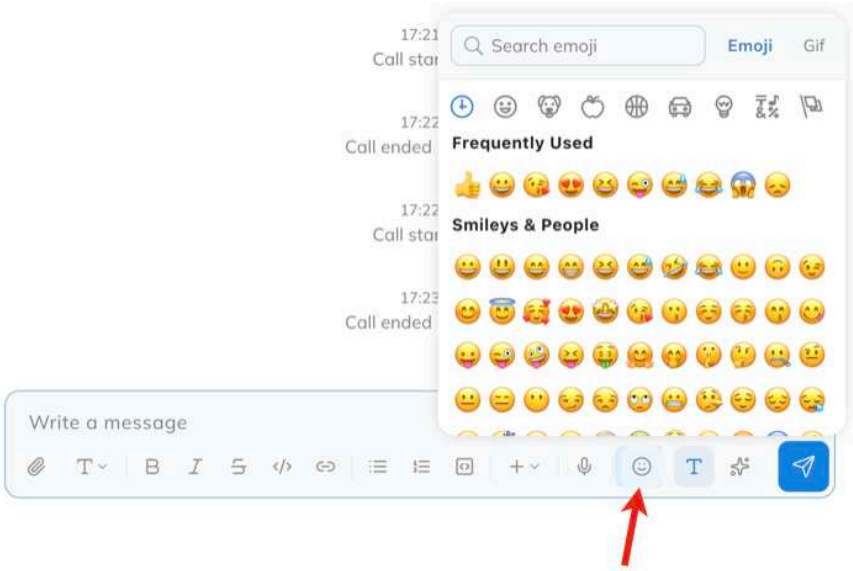
Click **Speech-to-text** button:



Once ready, press **Stop the dictation** button:

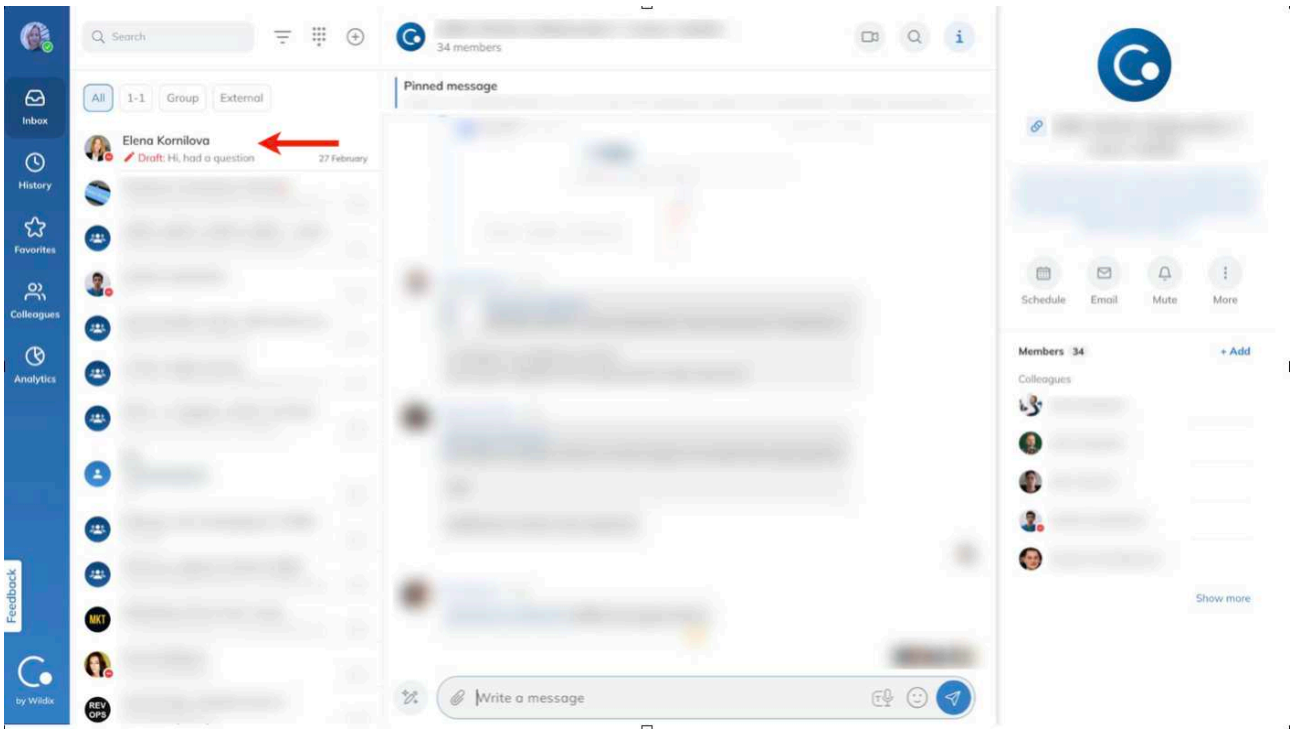


- **Send emojis and gifs:** click on the Emoji button in the message input field and choose the necessary emoji/gif:



Manage draft messages

Conversations with draft messages are moved to the top of the conversations list:



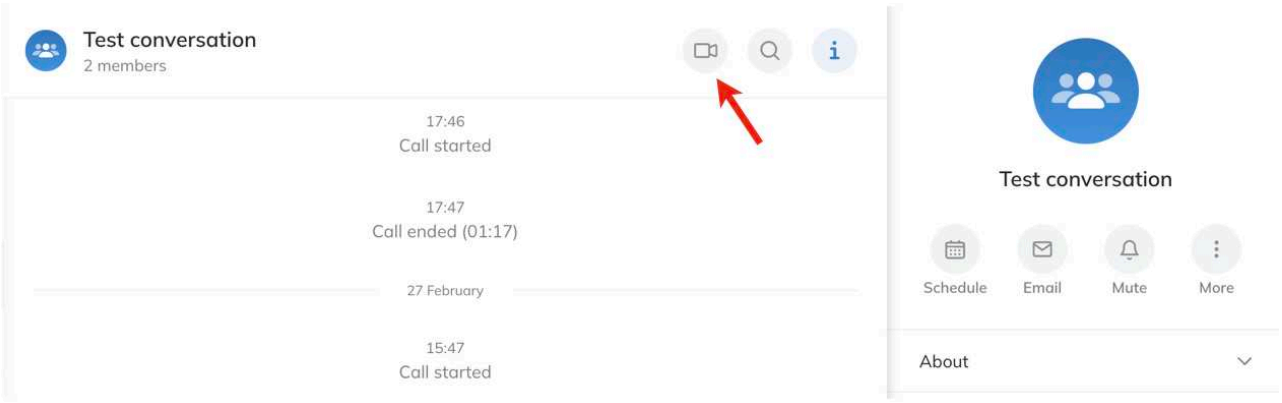
Draft messages are not lost after page refresh or closing the app, so you can finalise the draft and send the message when required.

Screen sharing

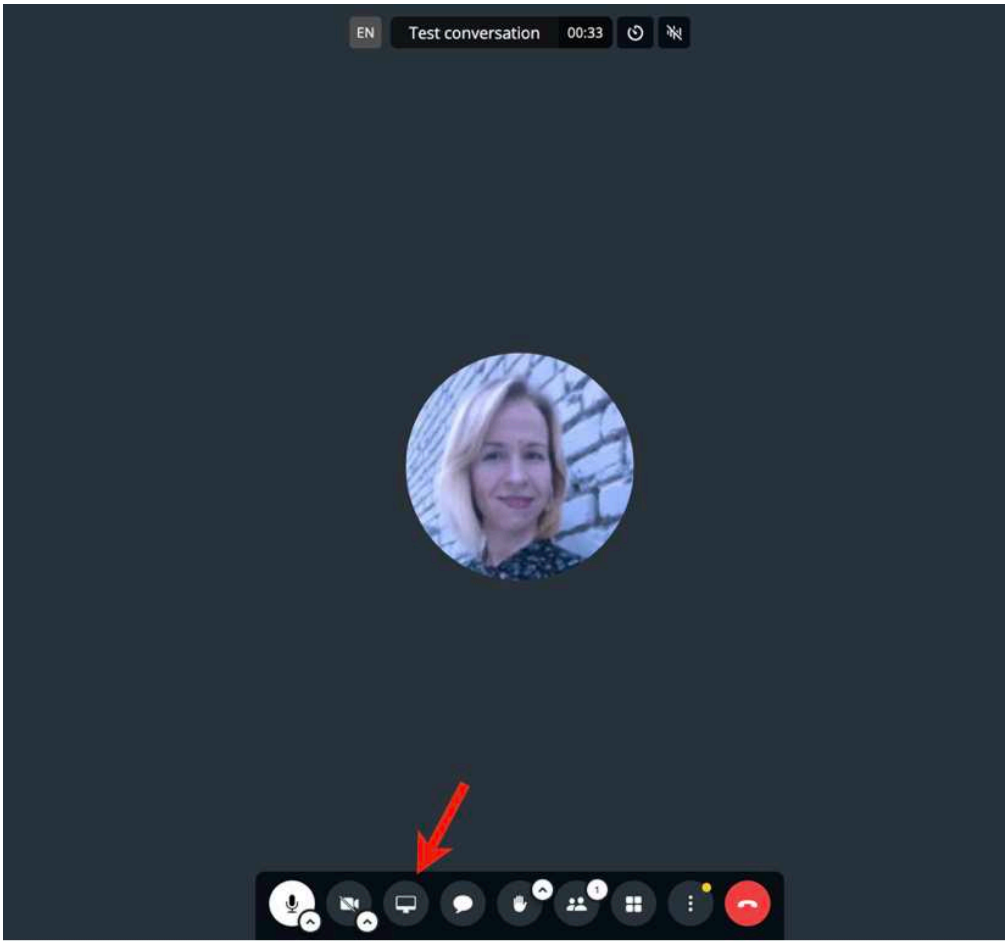
- **From a conference:**

To start screen sharing, you need to start a conference in a conversation:

1. Click on the **Video** icon from the upper right-hand part of the screen to start a conference:

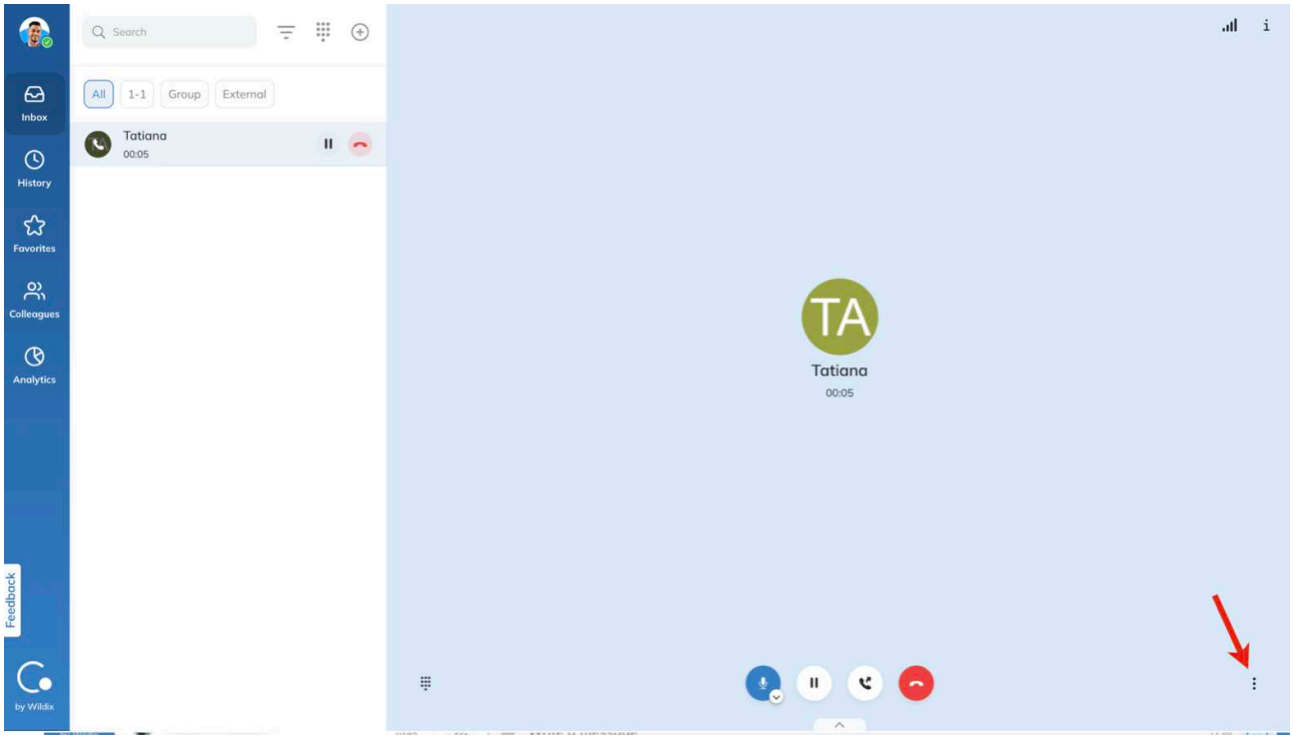


2. Click on the screen sharing button inside the conference:

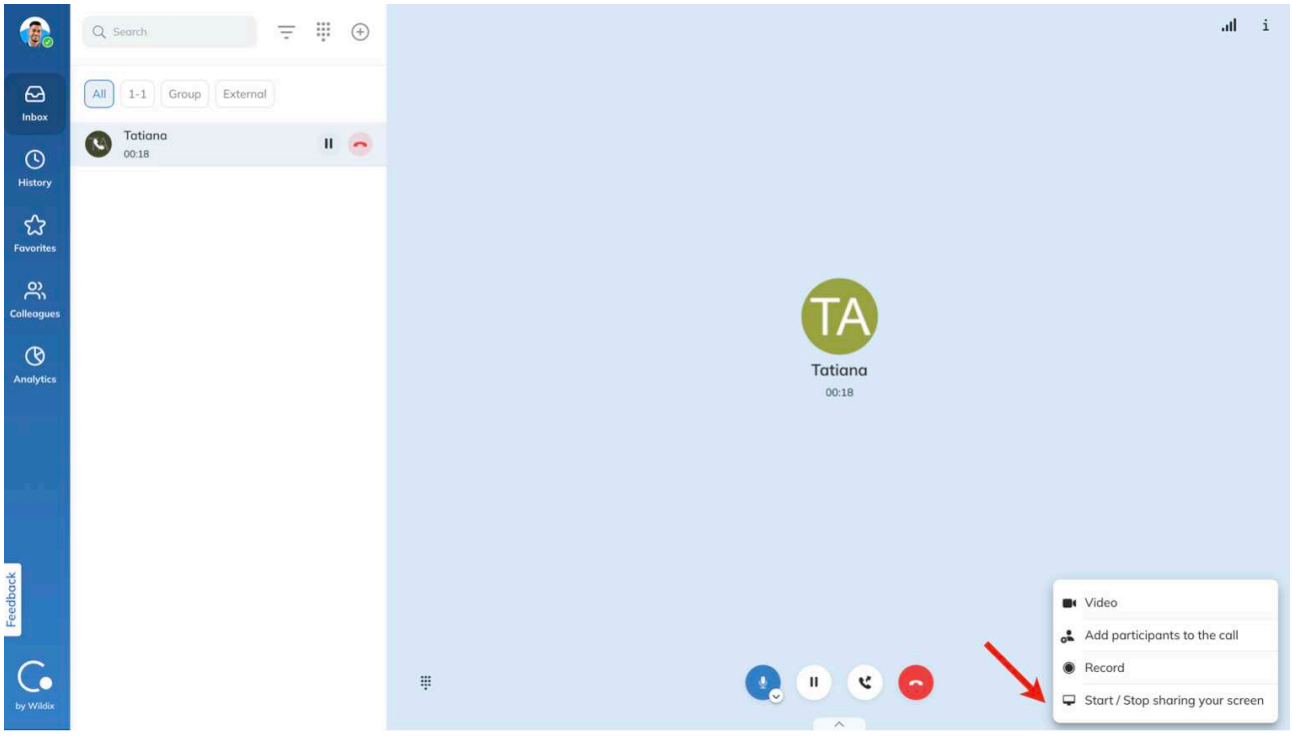


- **From a call:**

1. When in a call, click the three dots icon at the bottom of the screen:



2. Choose the option **Start/ Stop sharing your screen**:

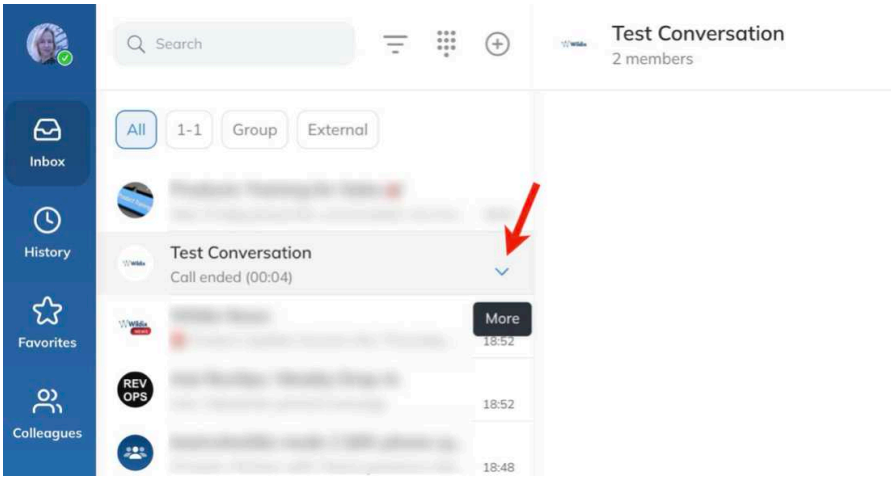


3. Audio call is automatically terminated and both participants are redirected to video conference with enabled screen sharing

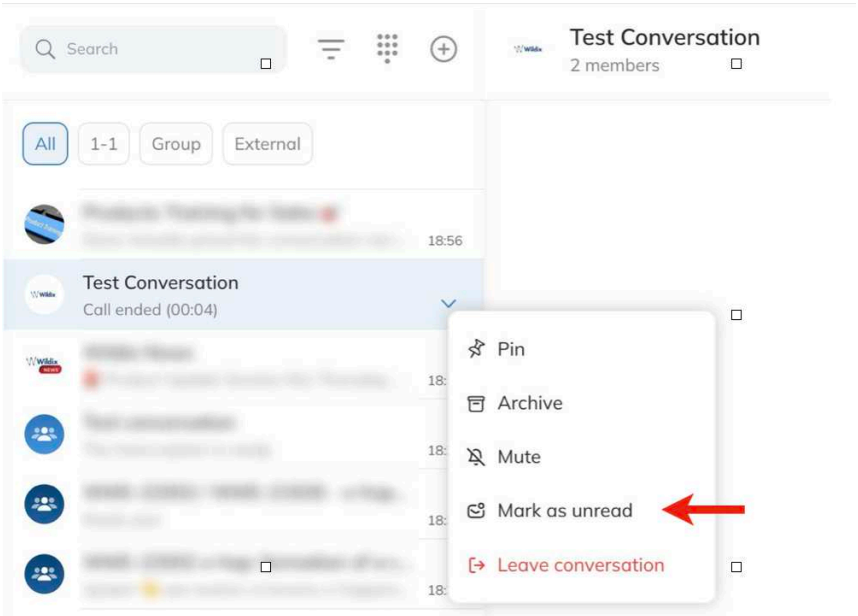
⚠ Current limitation: In case a call is transferred to a device which doesn't support screen sharing (for example, WP phones, etc) the button "Screen Sharing" is not disabled.

Mark conversation as read / unread

1. Right-click on the necessary conversation or hover the mouse over it and click on the **More** icon:

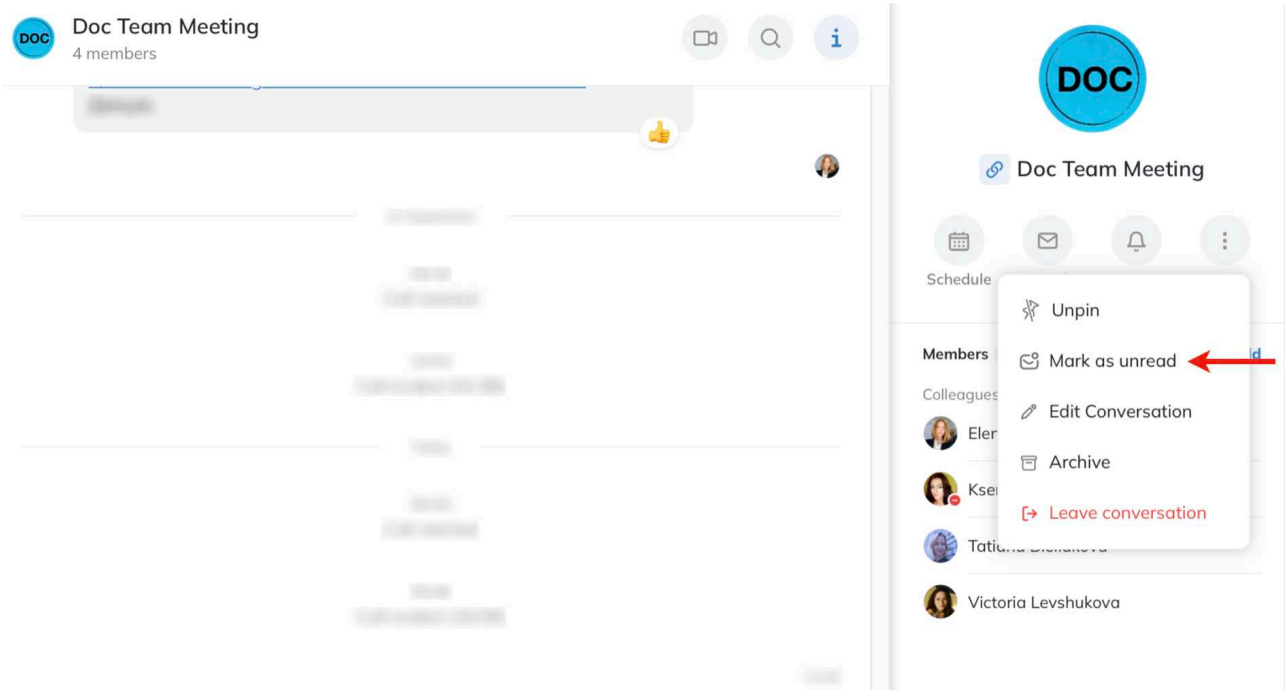


2. Press **Mark as unread / read:**



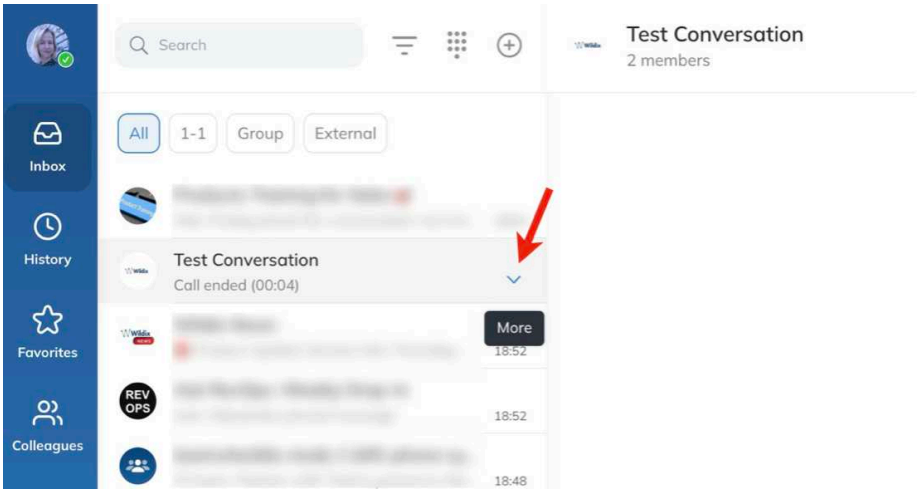
You can also mark conversation as read / unread from the Info frame:

1. Click on the **Info** icon from the upper right-hand part of the screen to open the *Info* frame.
2. Click the **More** icon and select **Mark as read / unread**.

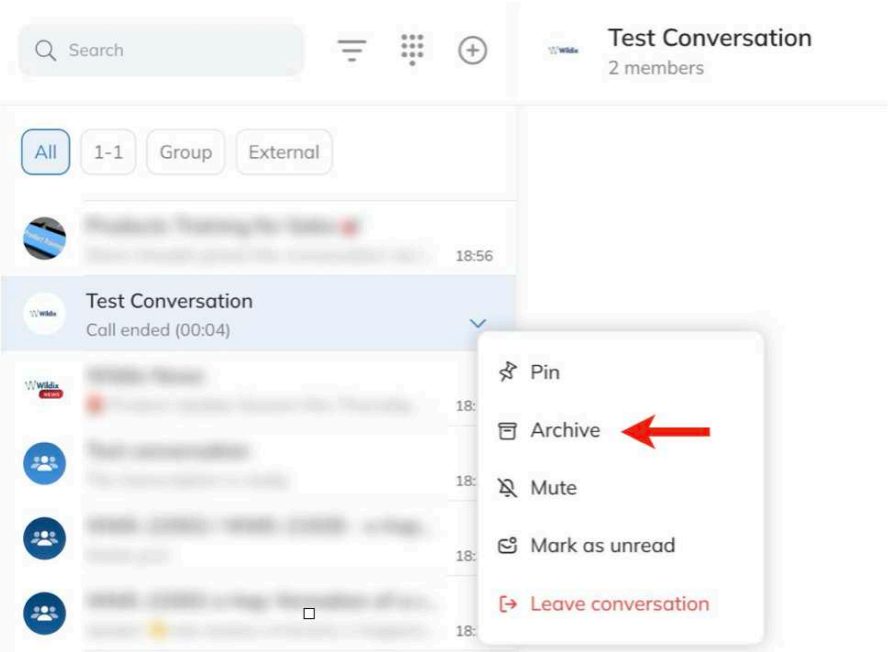


Archive conversation

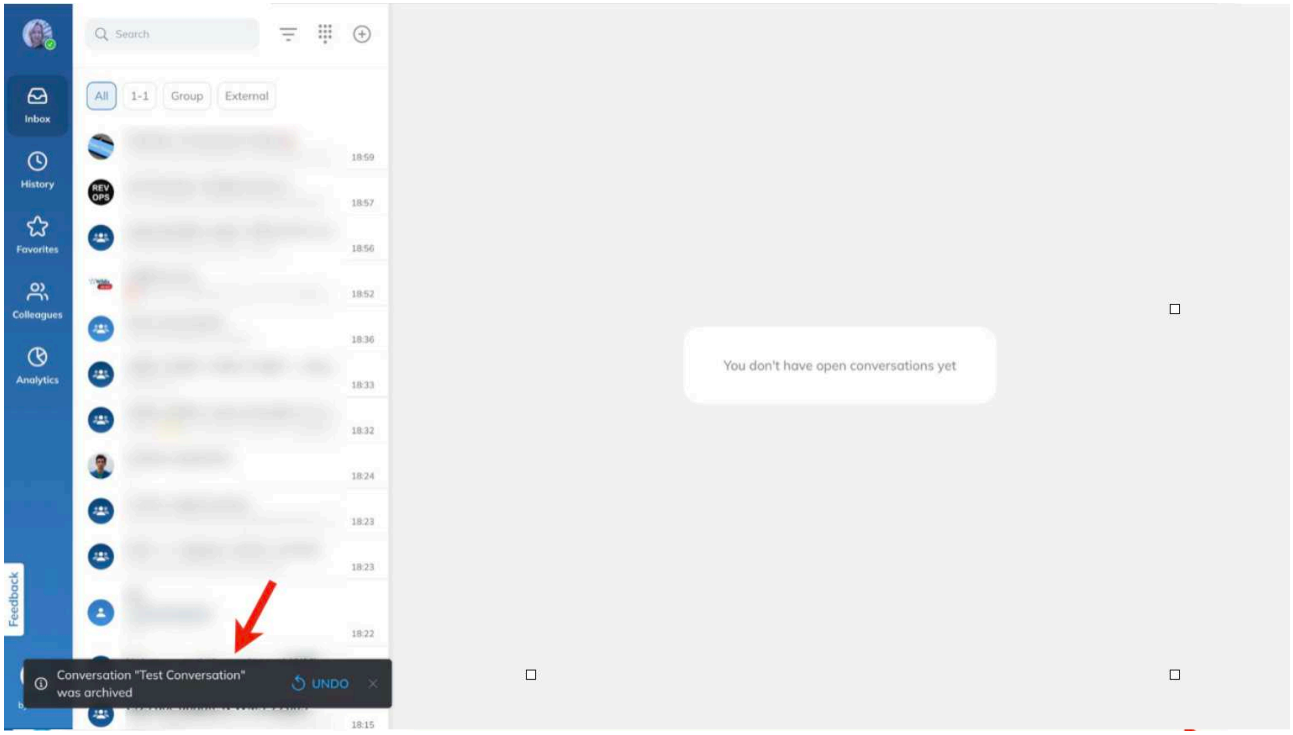
1. Right-click on the necessary conversation or hover the mouse over it and click on the **More** icon:



2. Choose the option **Archive**:



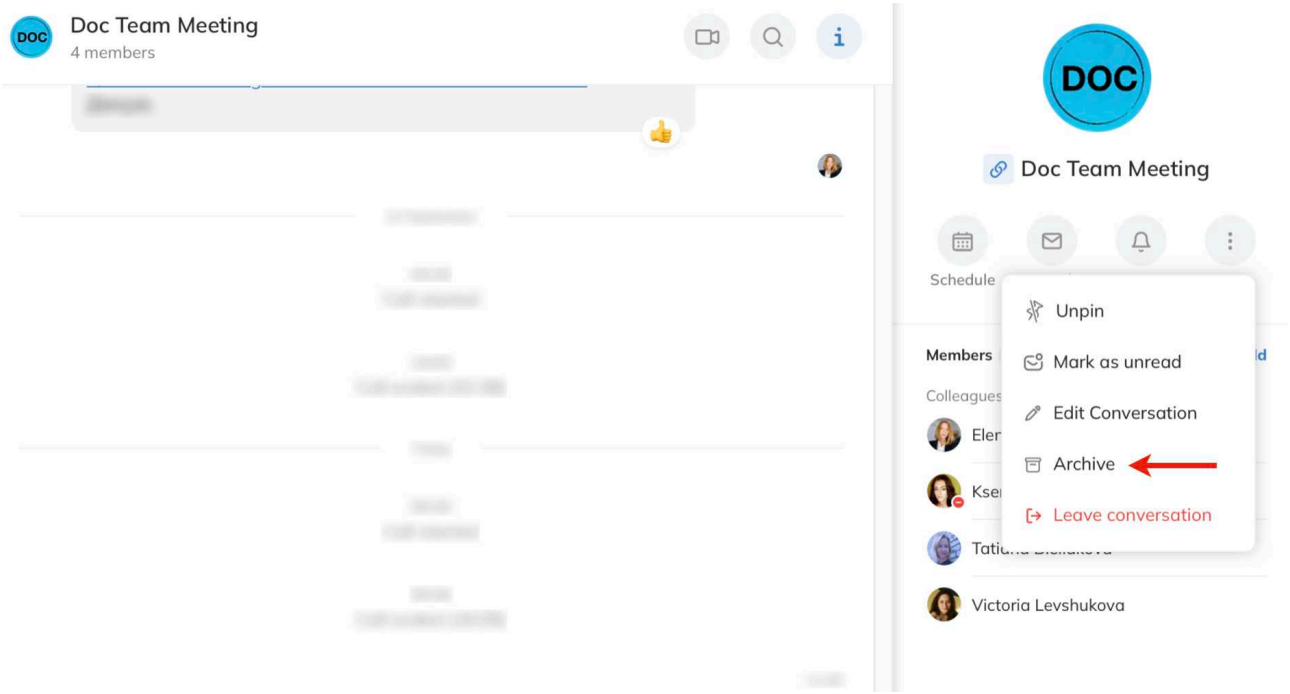
When a conversation is archived, a tooltip is displayed with the title "[Conversation name] is archived," along with an option to undo the action:



You can also archive conversation from the Info frame:

1. Click on the **Info** icon from the upper right-hand part of the screen to open the *Info* frame.

2. Click the **More** icon and select **Archive**.



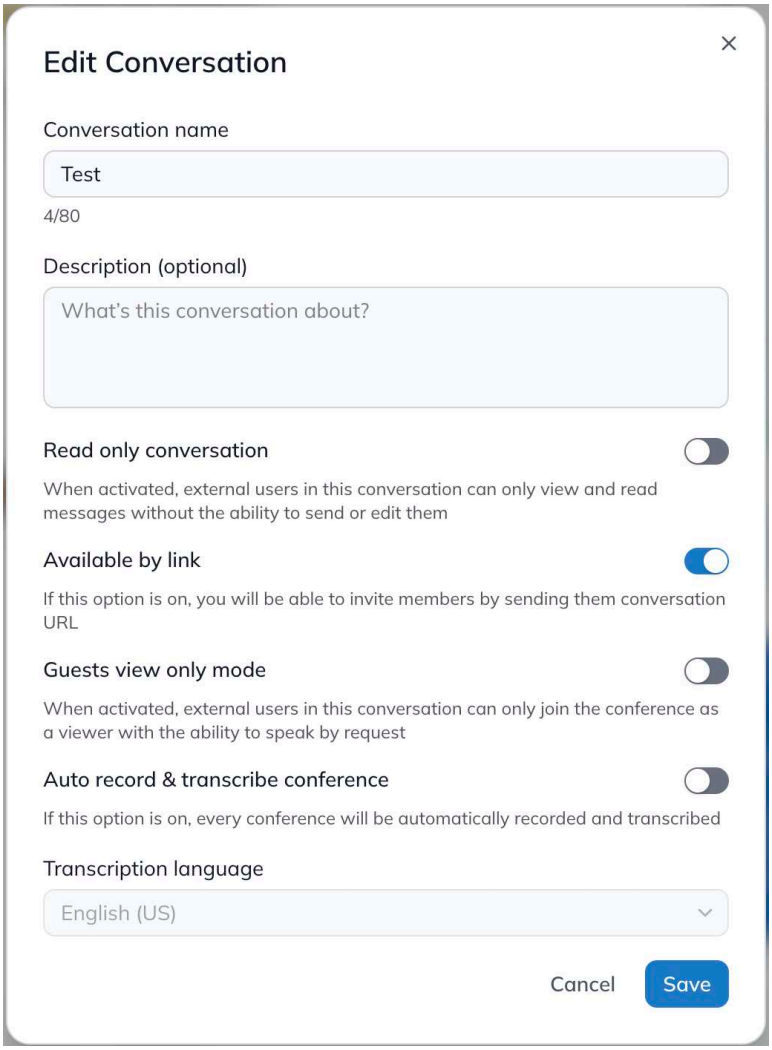
Edit conversation

You can edit conversation only from the Info frame:

1. Click on the **Info** icon from the upper right-hand part of the screen to open the *Info* frame.
2. Click the **More** icon and select **Edit conversation**.

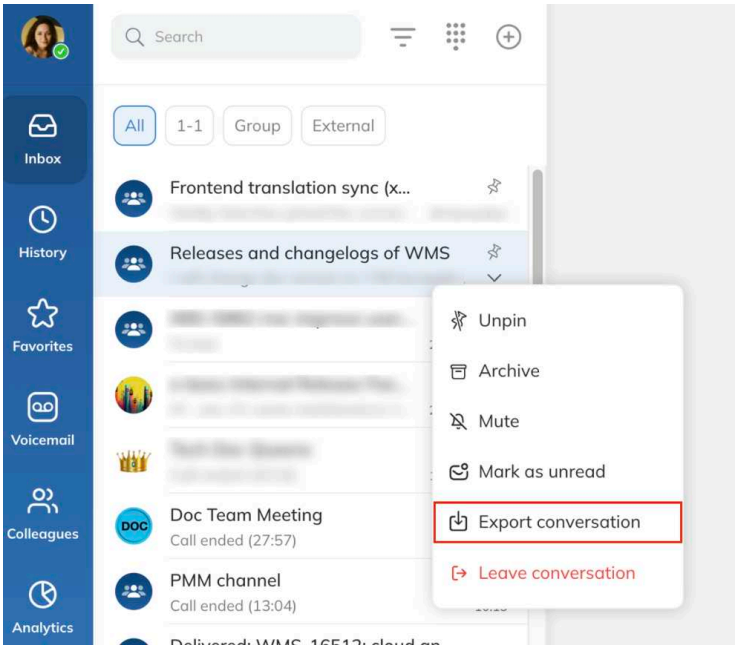
The Edit Conversation settings window will open, where you can change the name of the conversation, add a description and enable/disable options such as:

- *Read only conversation*
- *Available by link*
- *Auto record & transcribe conference*: when enabled, the system automatically starts recording and transcribing the conference. You can also select the transcription language.



Export conversation

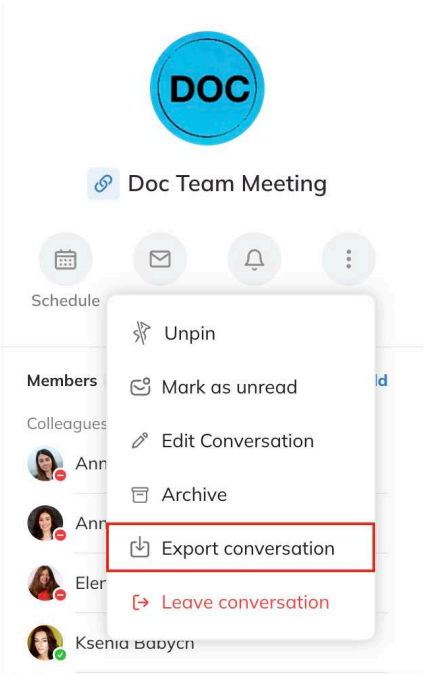
1. Right-click on the necessary conversation or hover the mouse over it and click on the **More** icon:
2. Press **Export conversation.**



3. The Download window will open, where you can change the file name in the *Save As* field and choose a folder to save the conversation. Once ready, click **Save** to confirm. The conversation will be exported in .txt format.

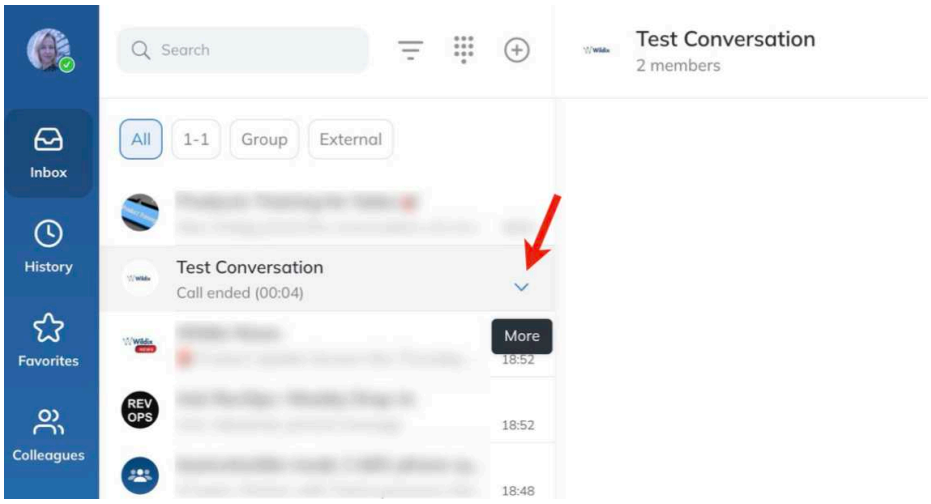
You can also export conversation from the Info frame:

1. Click on the **Info** icon from the upper right-hand part of the screen to open the *Info* frame.
2. Click the **More** icon and select **Export conversation**.

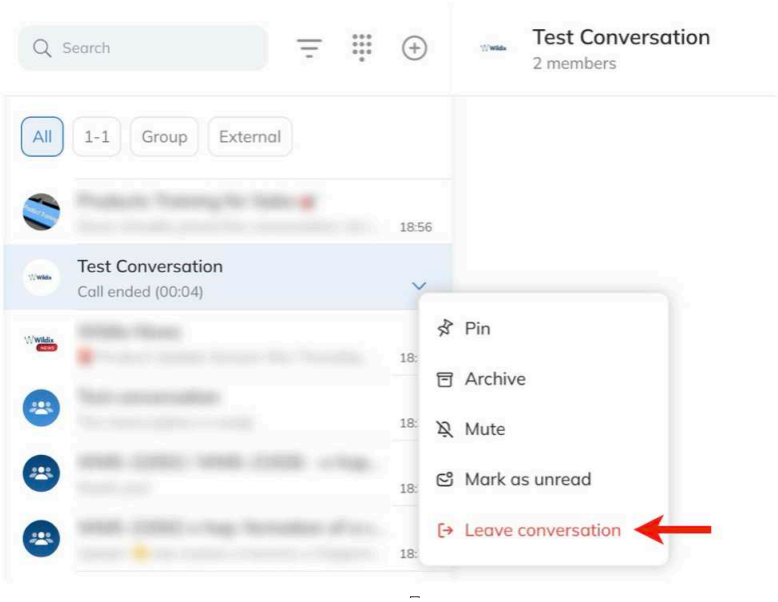


Leave a conversation

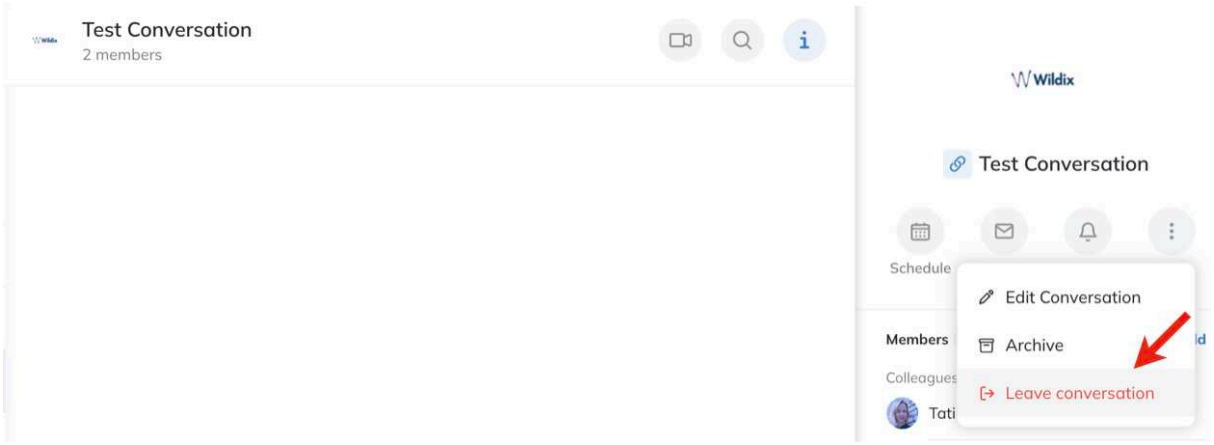
1. Right-click on the necessary conversation or hover the mouse over it and click on the **More** icon:



2. Press **Leave conversation**:

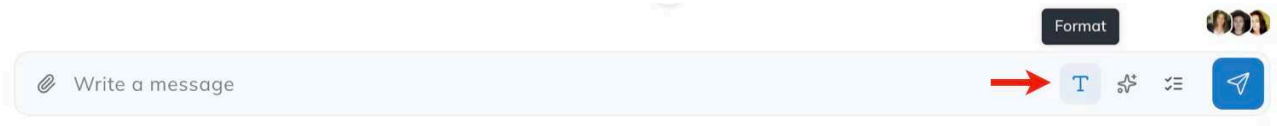


3. Alternatively, click on the **More (three dots)** button on the *Conversation Info* frame and click **Leave conversation**



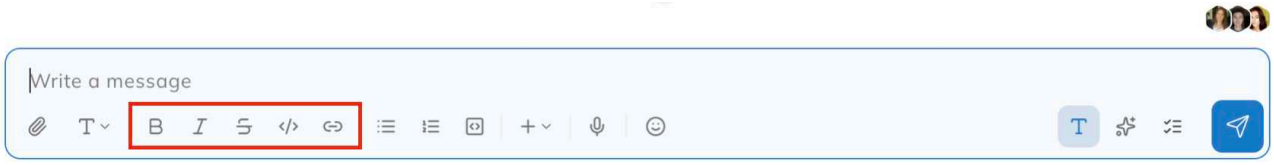
Markdown support and rich text formatting

Collaboration 7 supports markdown for chat messages, allowing you to compose, send, and edit formatted text. To access formatting options within the rich text editor, click the **Format** button:

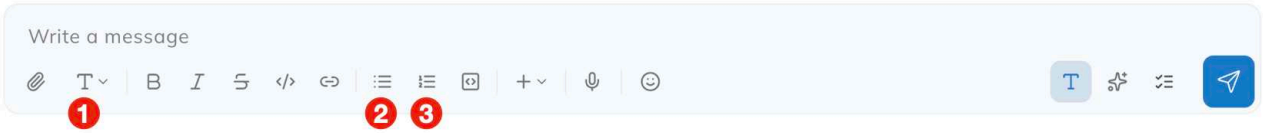


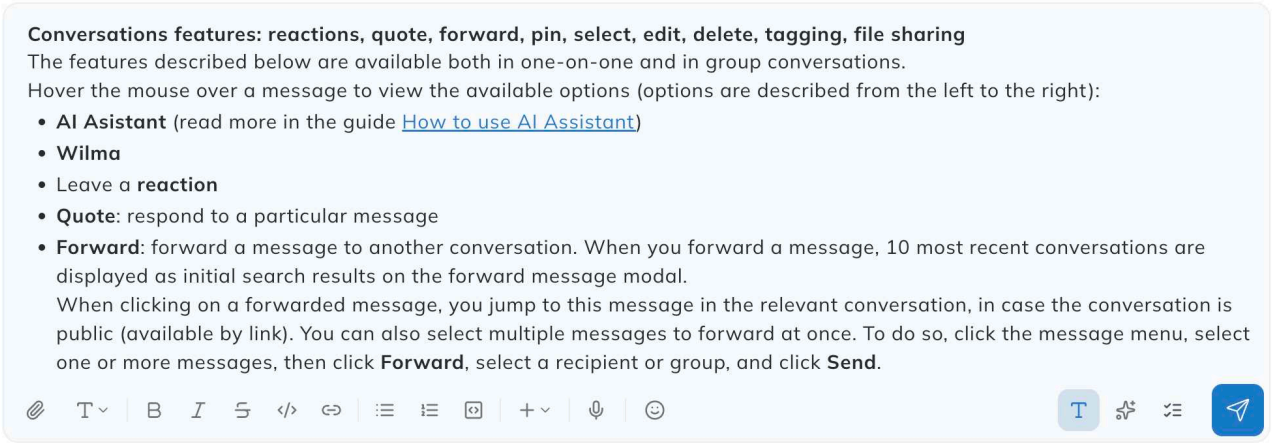
You can apply:

- *Text styles:* apply bold (Ctrl/Cmd + B), italic (Ctrl/Cmd + I), strikethrough, inline code, add link

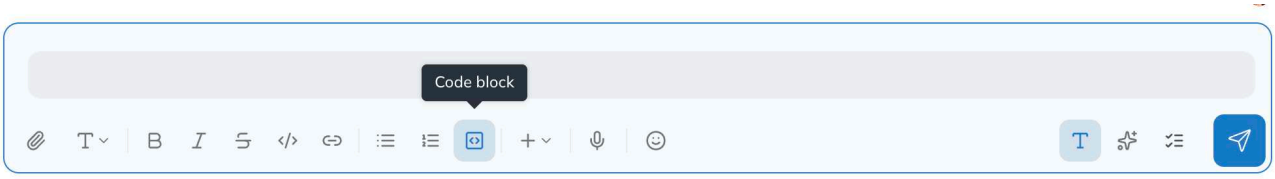


- *Structure*: add headings (1), bulleted (2) and numbered (3) lists

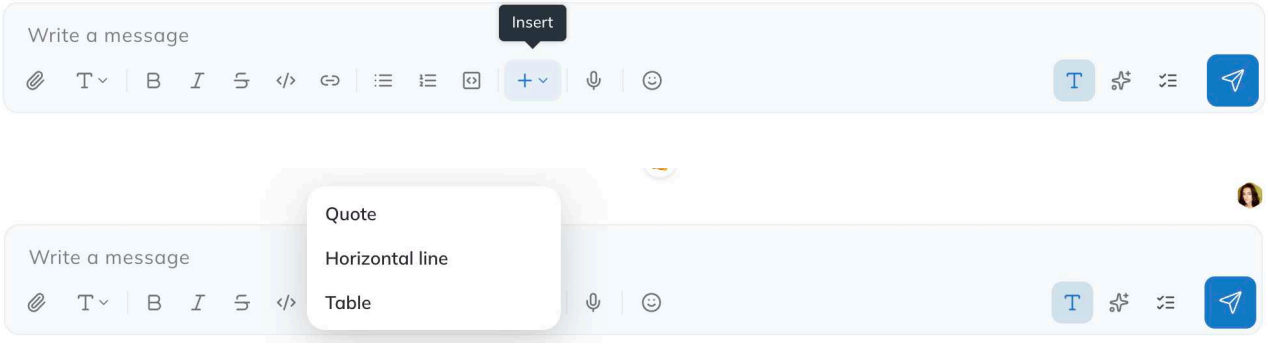




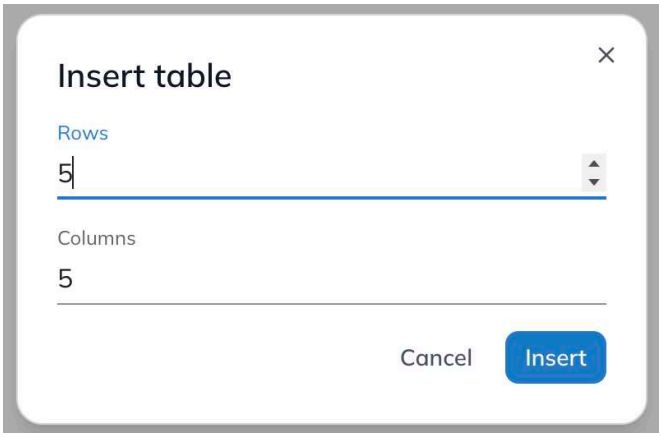
- *Add code block*



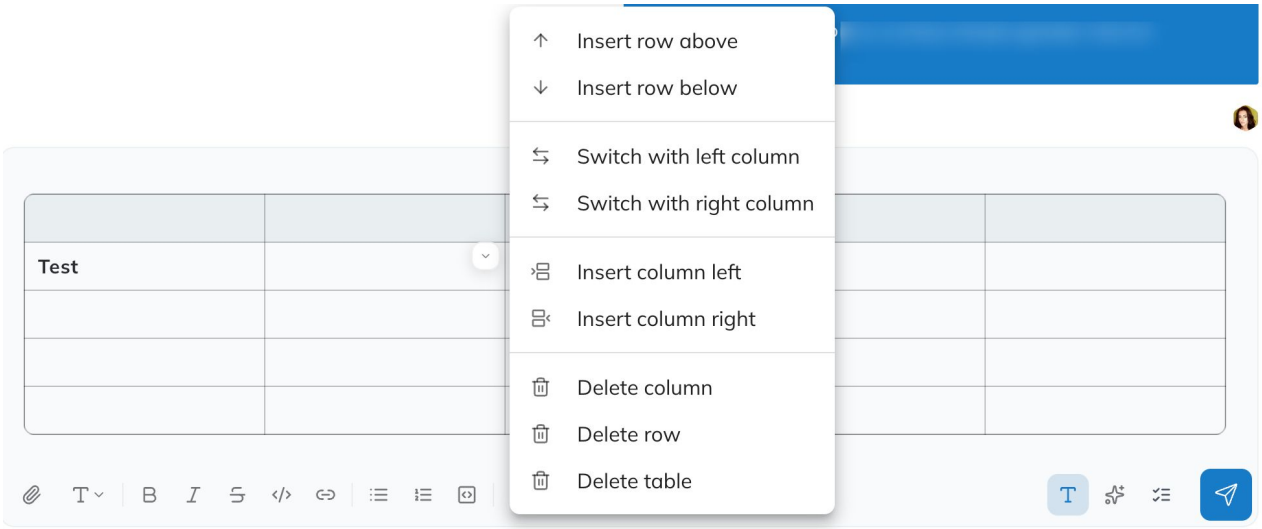
- By clicking **Insert**, you can add Quote, Horizontal line, and Table



When entering a table, you need to indicate the number of its rows and columns:



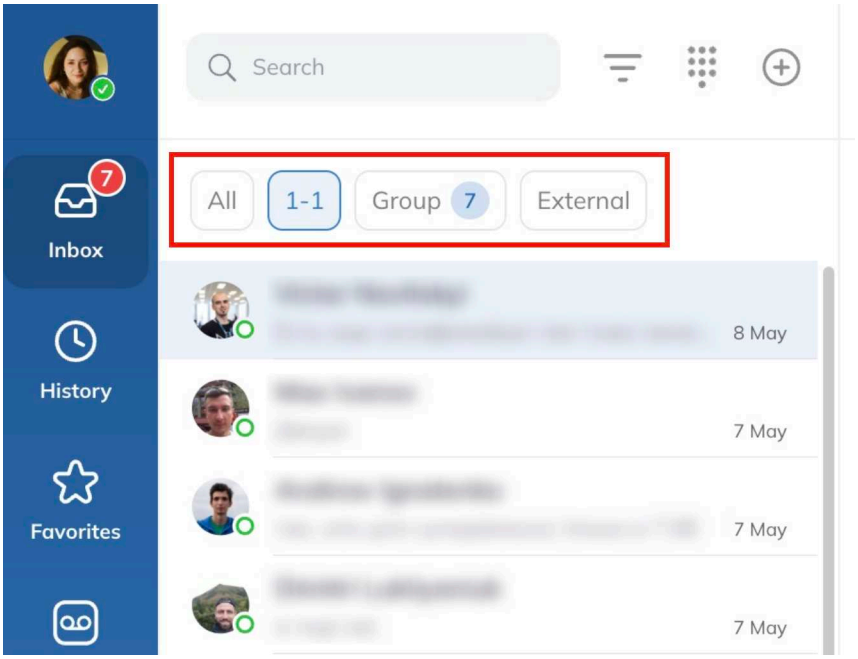
You can modify the table afterwards, too, by adding or deleting rows, columns, switch columns, etc.:



Conversations filter

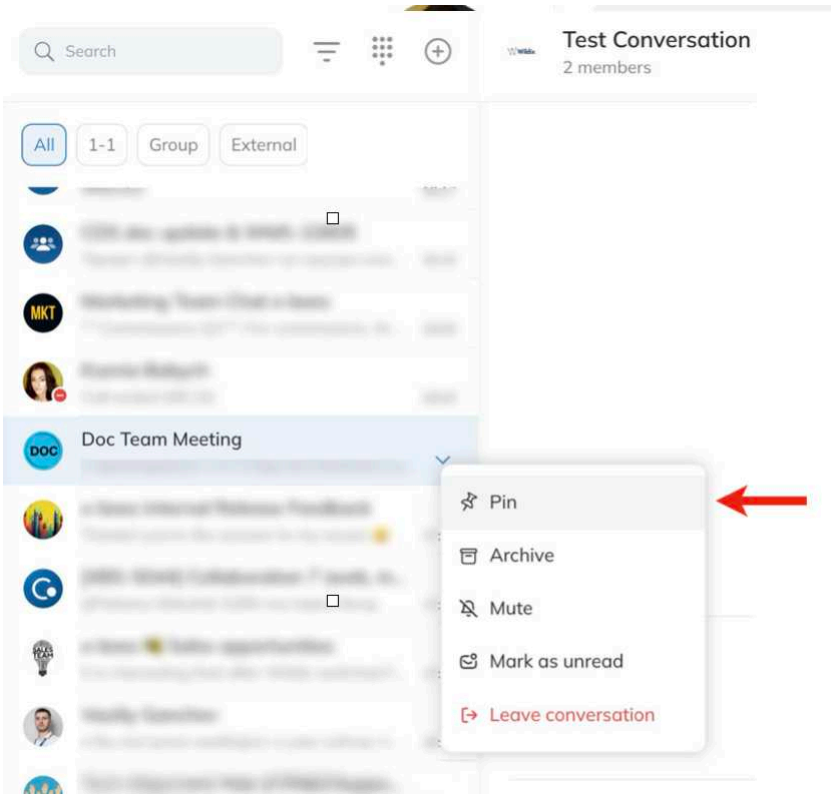
Conversations on the Inbox page in Collaboration 7 are split by the following tabs:

- *All*: displays all available conversations
- *1-1:* displays one-on-one conversations with internal users
- *Group*: displays group conversations with internal users
- *External:* includes both one-on-one and group conversations with external users

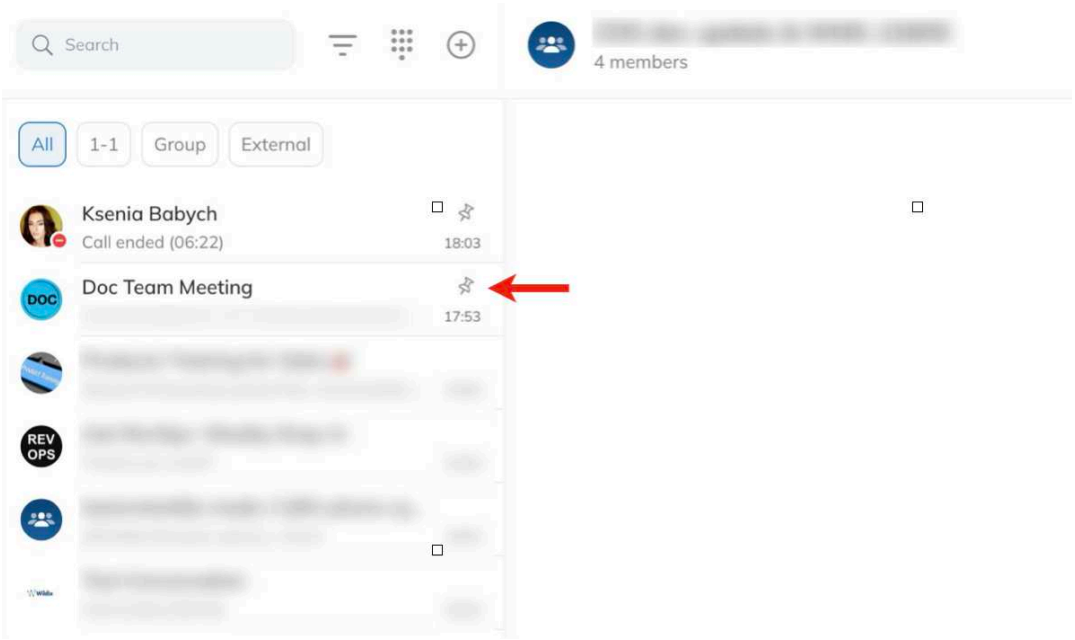


Pin conversations

To pin a conversation, right-click the necessary conversation and choose the option **Pin**:



Pinned conversations are displayed at the top, with the pin icon:

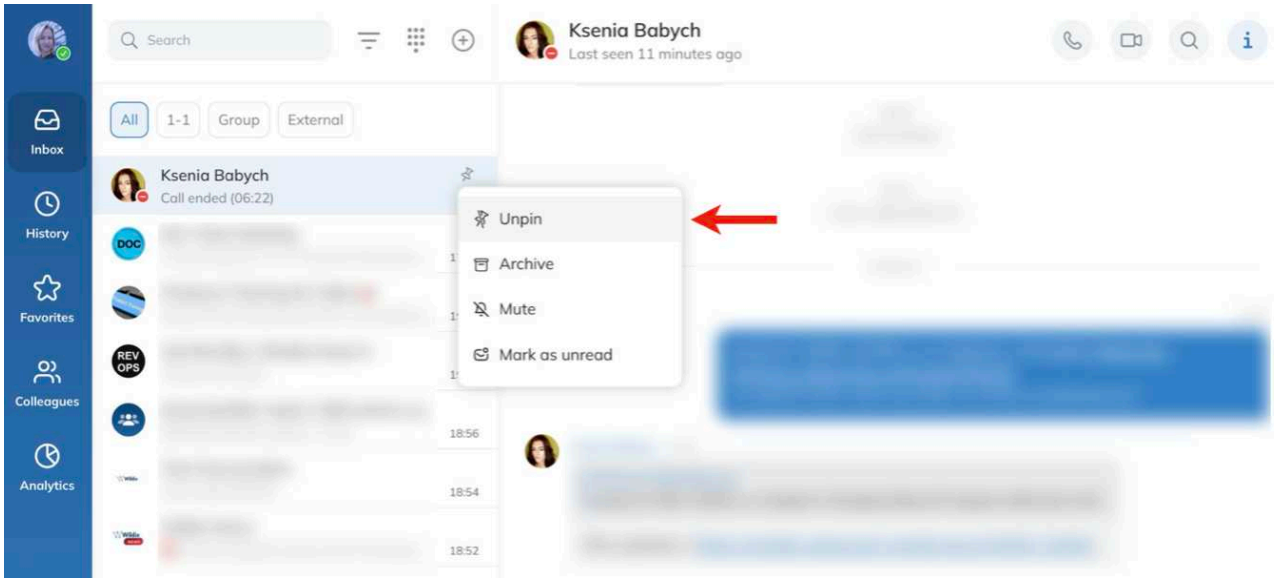


Note:

- The maximum number of pinned conversations is 10.
- Pinned conversations are displayed in the order of pinning and are synced between devices.
- Conversations with draft and new messages are displayed under pinned conversations.
- Conversations with an active conference is displayed at the top, above pinned conversations.

Unpin conversation

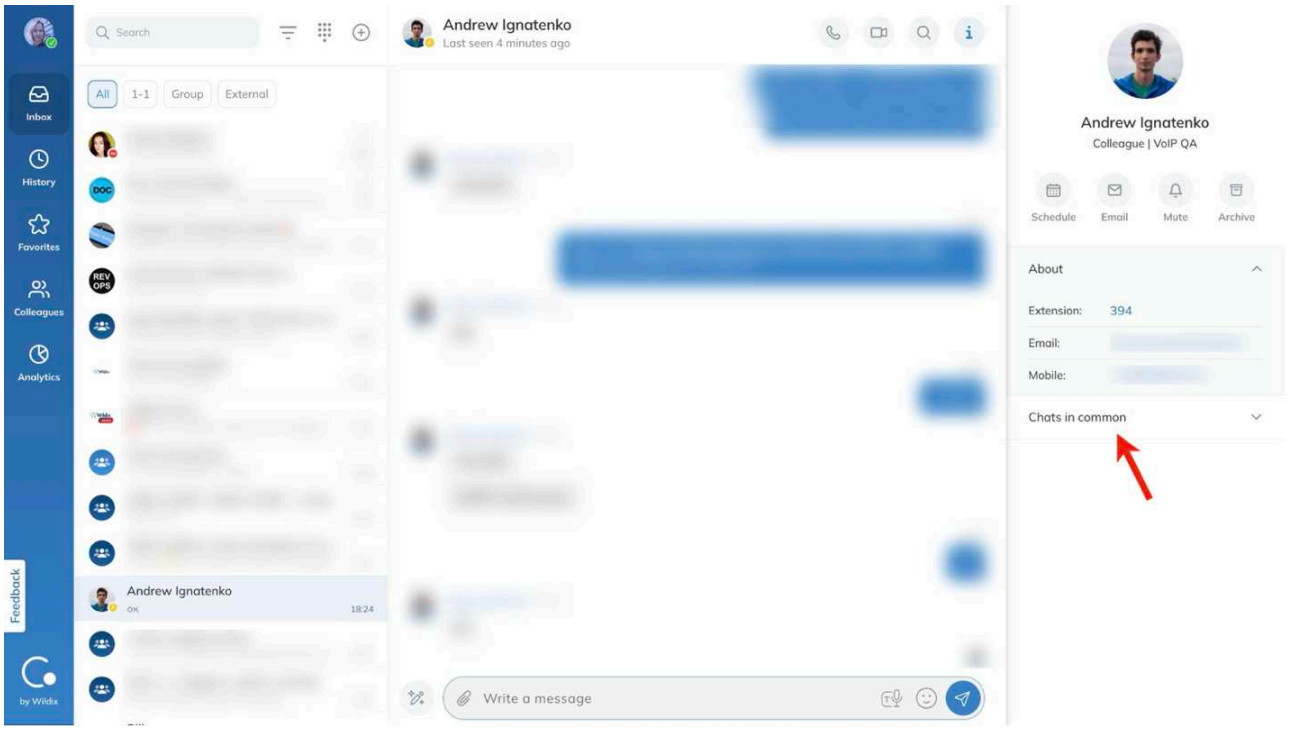
To unpin a conversation, right-click on it and press **Unpin:**



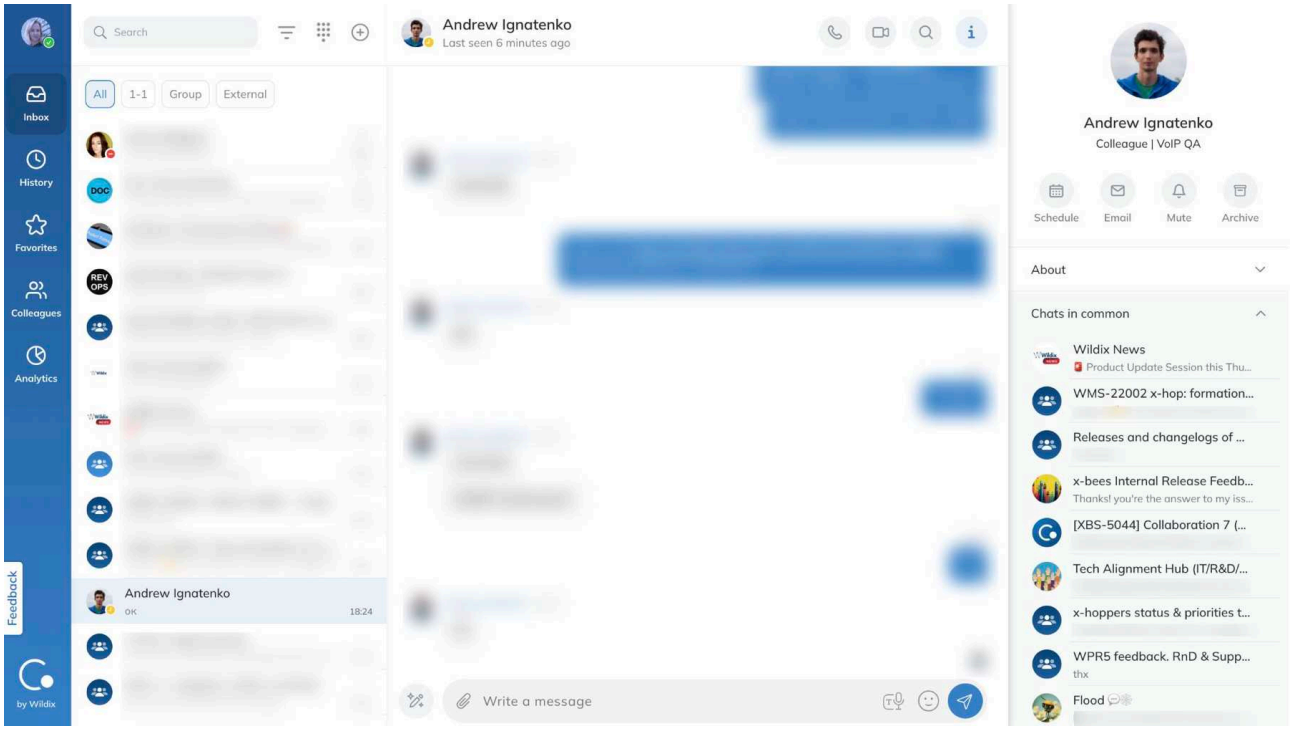
View conversations in common

For an easy navigation through group conversations, you can view conversations you have in common with other users. On the user's profile on the Info frame, there is the dedicated section *Chats in common*, which displays the list of conversations you and the user both participate in. To access it:

- In one-on-one conversation: click on the Info button - > see the section **Chats in common.** Click on it to unfold the list:

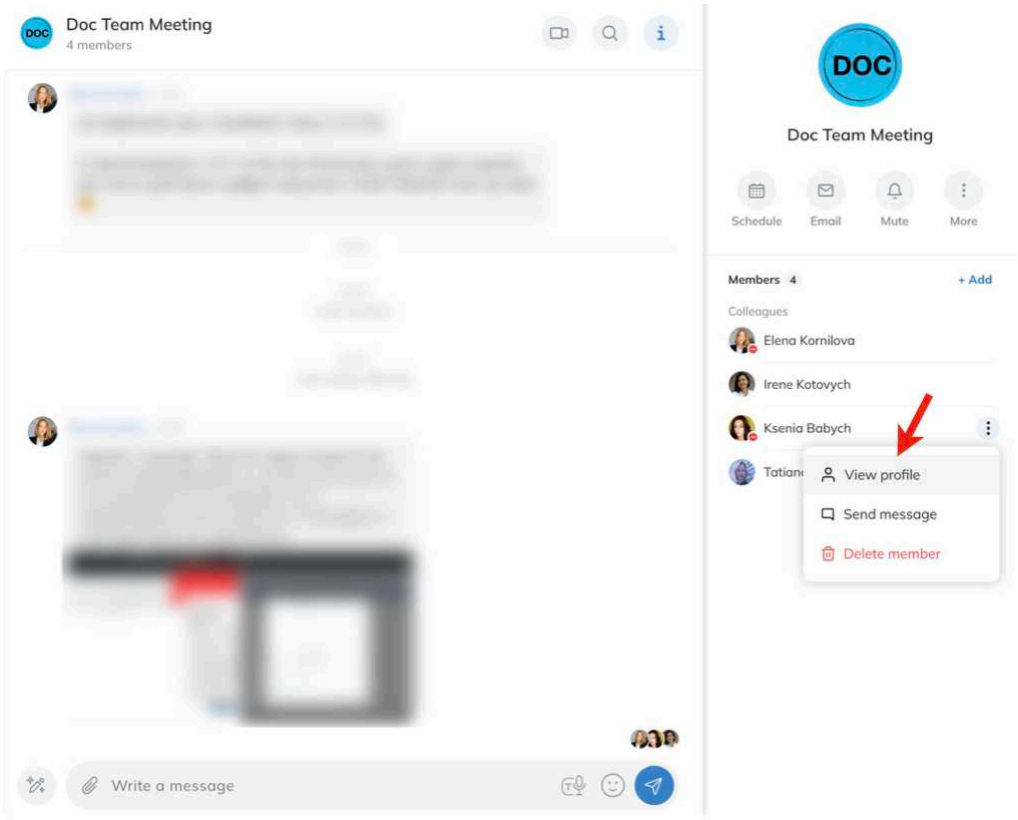


The list of common conversations is sorted by the last message date and time. The list includes names of the group conversations and a snippet of the most recent message.

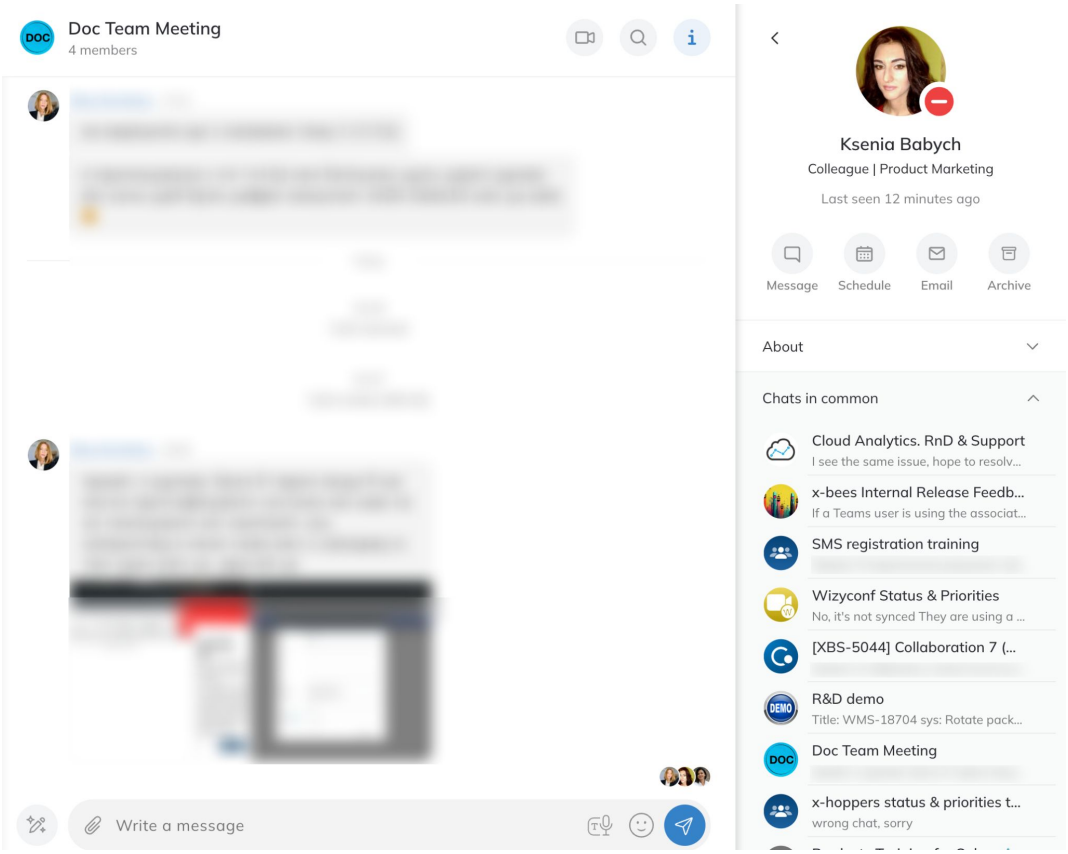


Clicking on the conversation, the conversation opens.

- In group conversation, open Info frame -> find the relevant user -> click three dots -> **View profile:**

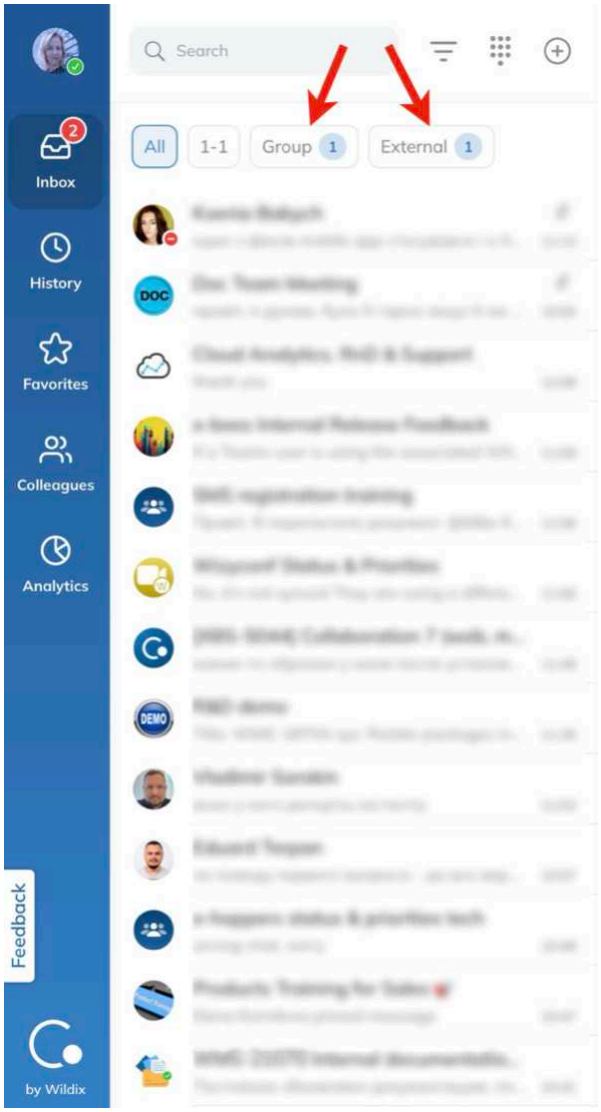


See the list of chats in common with the user:

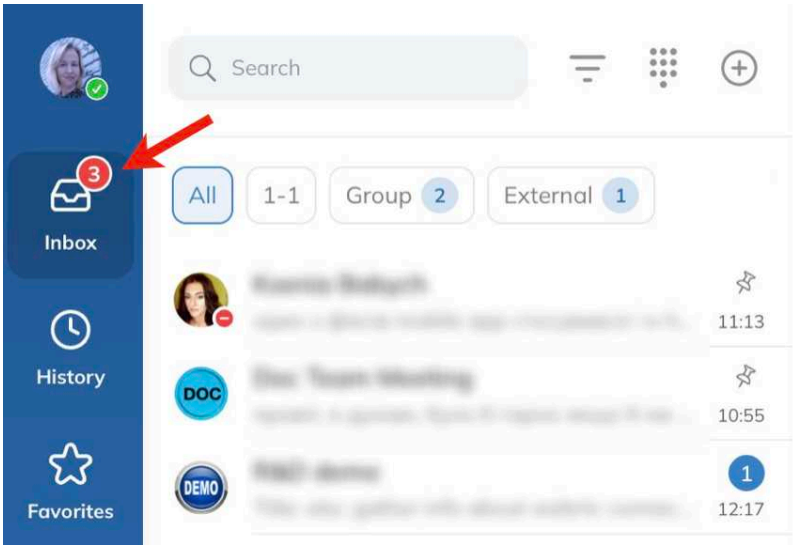


Unread message indicators

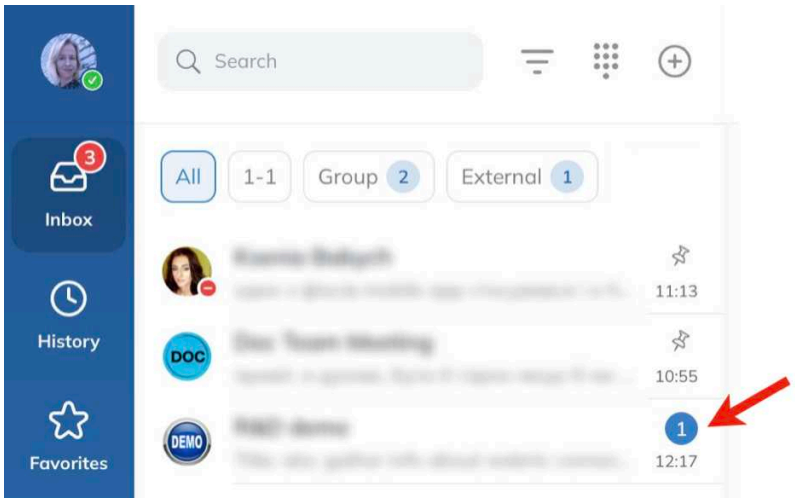
The number next to the tab name (for the tabs 1-1, Group, External) corresponds to the number of unread messages in conversations of the relevant tab:



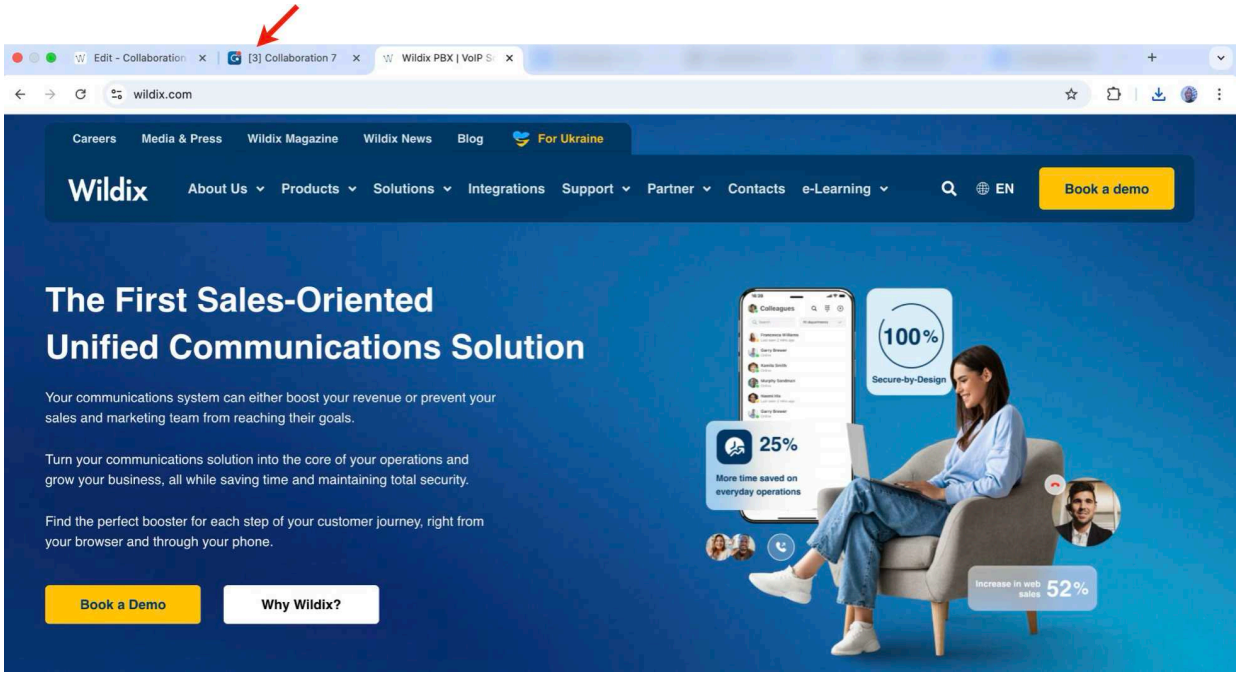
On the *All* tab, there is no unread message counter - the total number of unread messages is displayed on the Inbox:



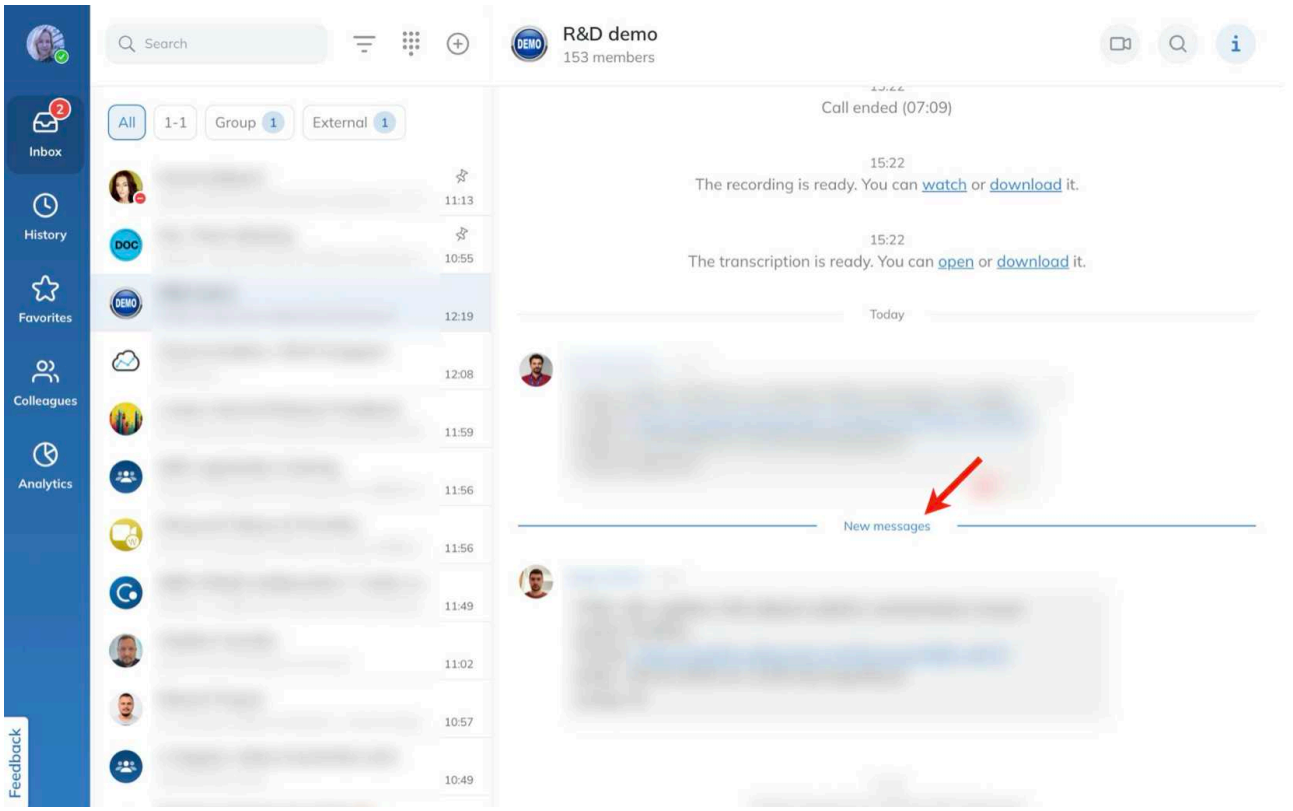
The number of unread messages is also displayed next to the relevant conversation:



Also, there is unread message indicator (red dot) on the browser tab:

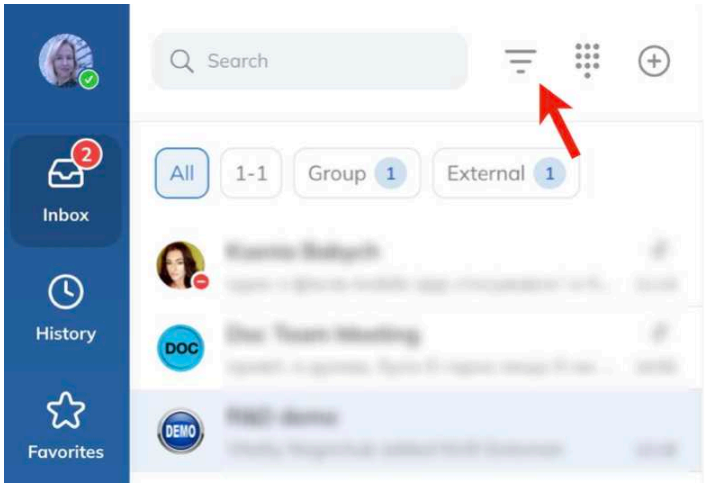


When proceeding to the conversation with unread messages, there is the *New messages* separator that separates the new messages from the old ones:

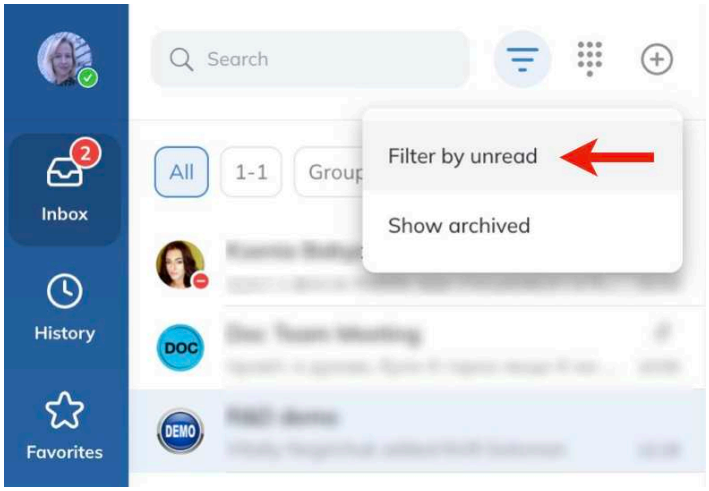


Filter conversations by unread messages

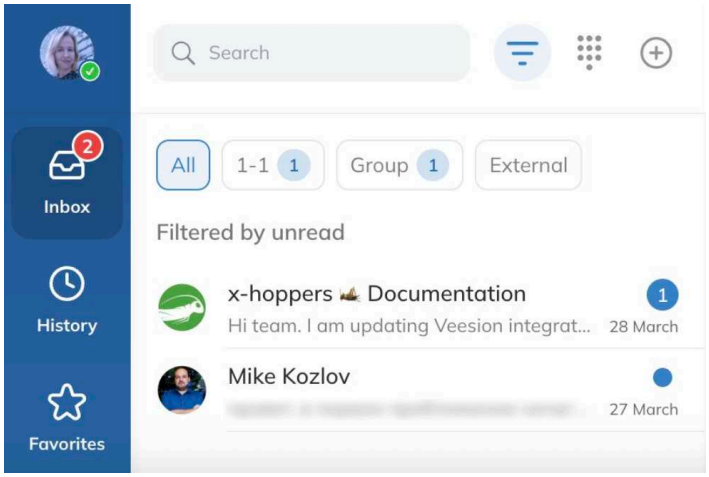
1. To have a quick access to conversations with unread messages, click on the **Filter** button next to the Search field:



2. Choose the option **Filter by unread**:



3. When the filter is enabled, only conversations with unread messages are displayed:

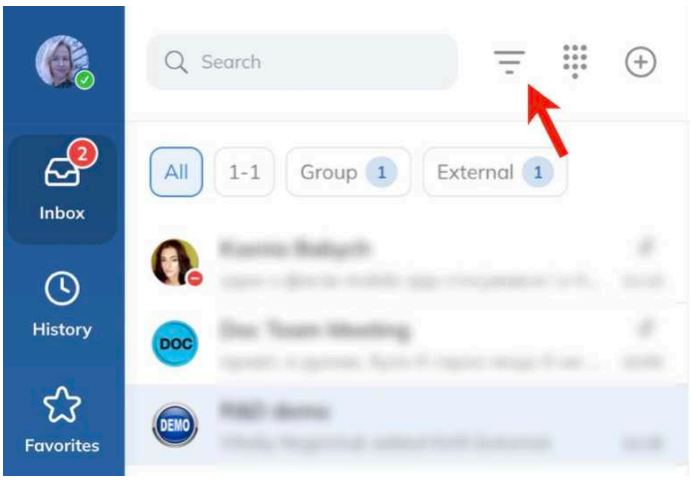


To disable the filter, click on the **Filter** button again.

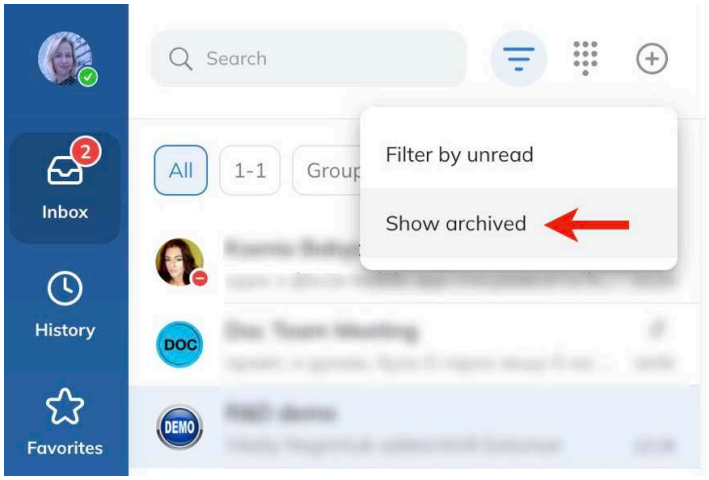
Note:
- The filter works for all tabs (All, 1-1, Group, External)
- Muted conversations are also displayed
- After refreshing the page, the filter is disabled

Filter archived conversations

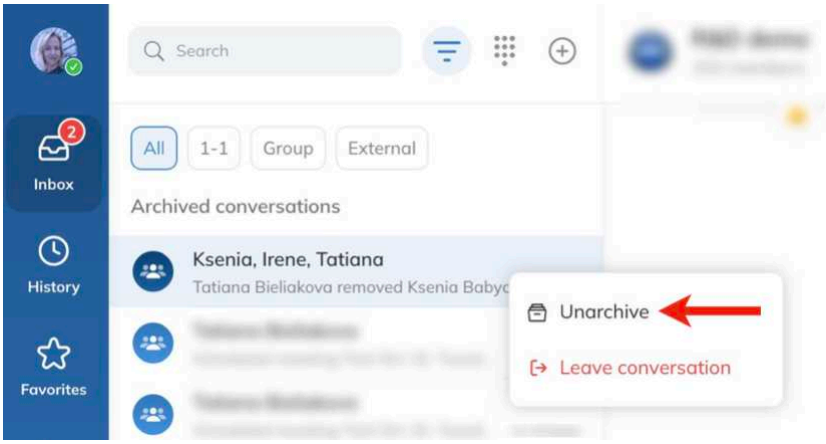
1. To get a quick access to archived conversations, click on the **Filter** button next to the Search field:



2. Choose the option **Show archived**:



3. Only archived conversations are displayed. If you right-click on the conversation, you get the following options: **Unarchive** or **Leave conversation**:

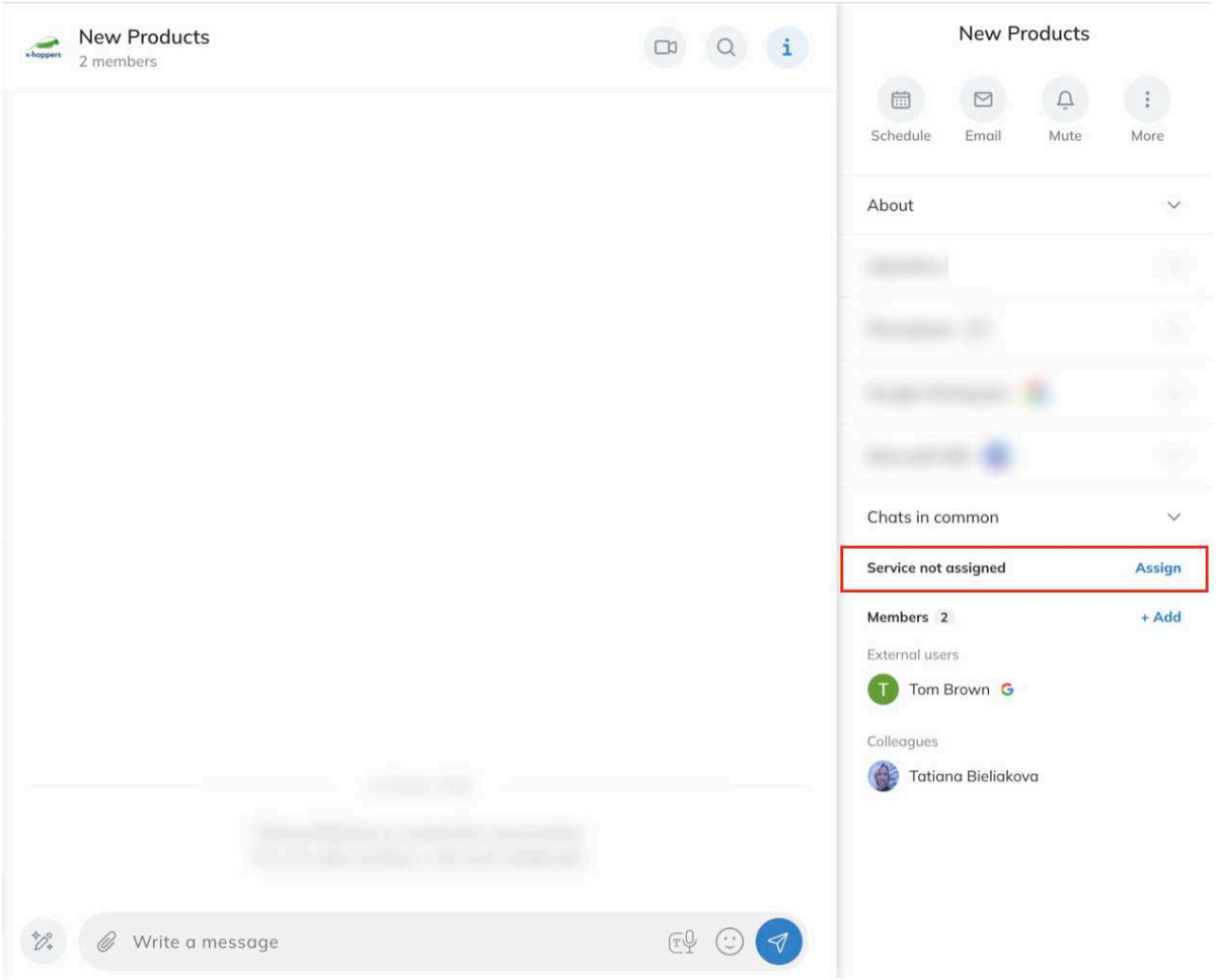


To disable the filter, click on the **Filter** button again.

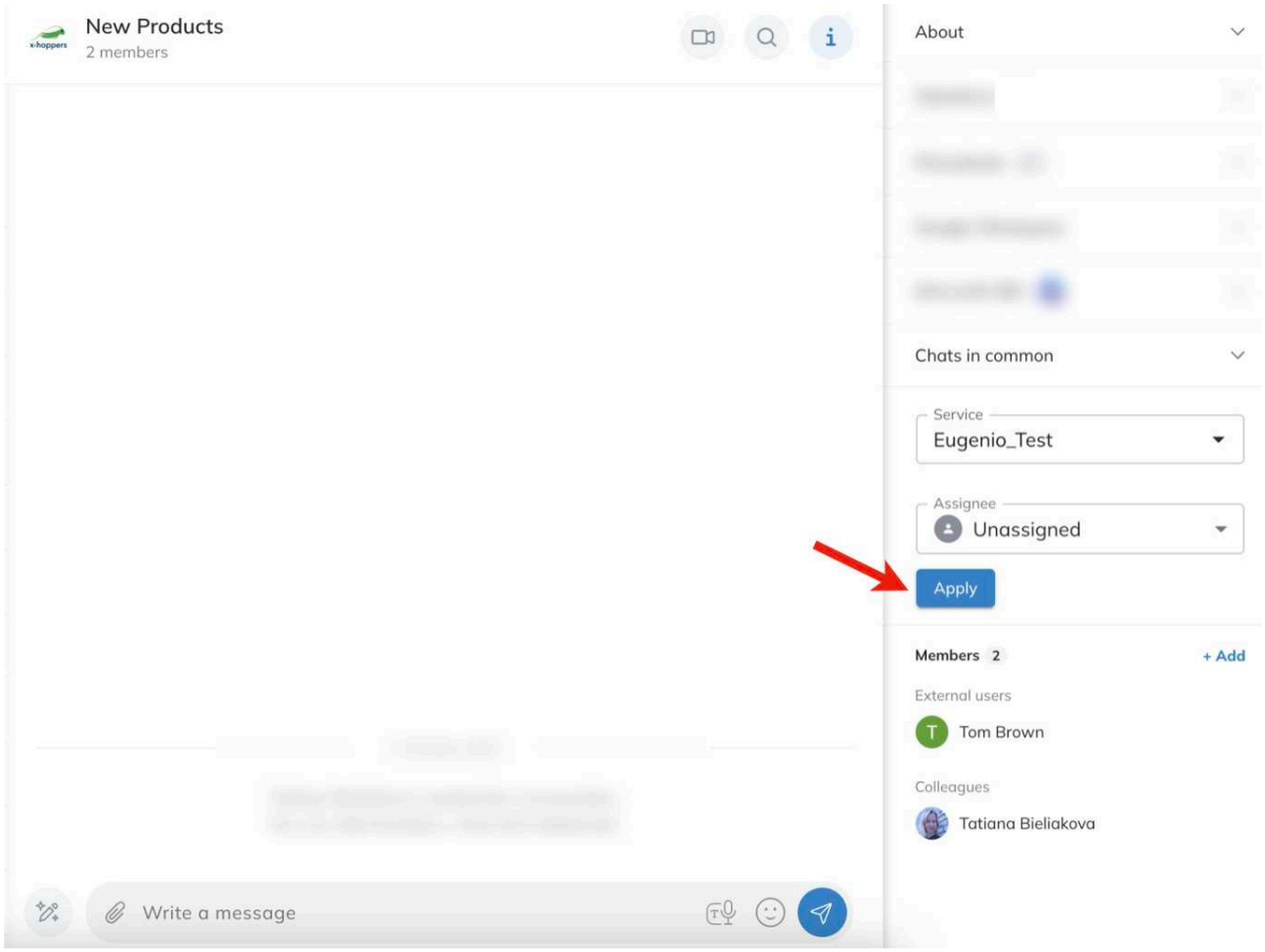
Note:
- The filter works for all tabs (All, 1-1, Group, External)
- Muted conversations are also displayed
- After refreshing the page, the filter is disabled

Assign conversations with external users

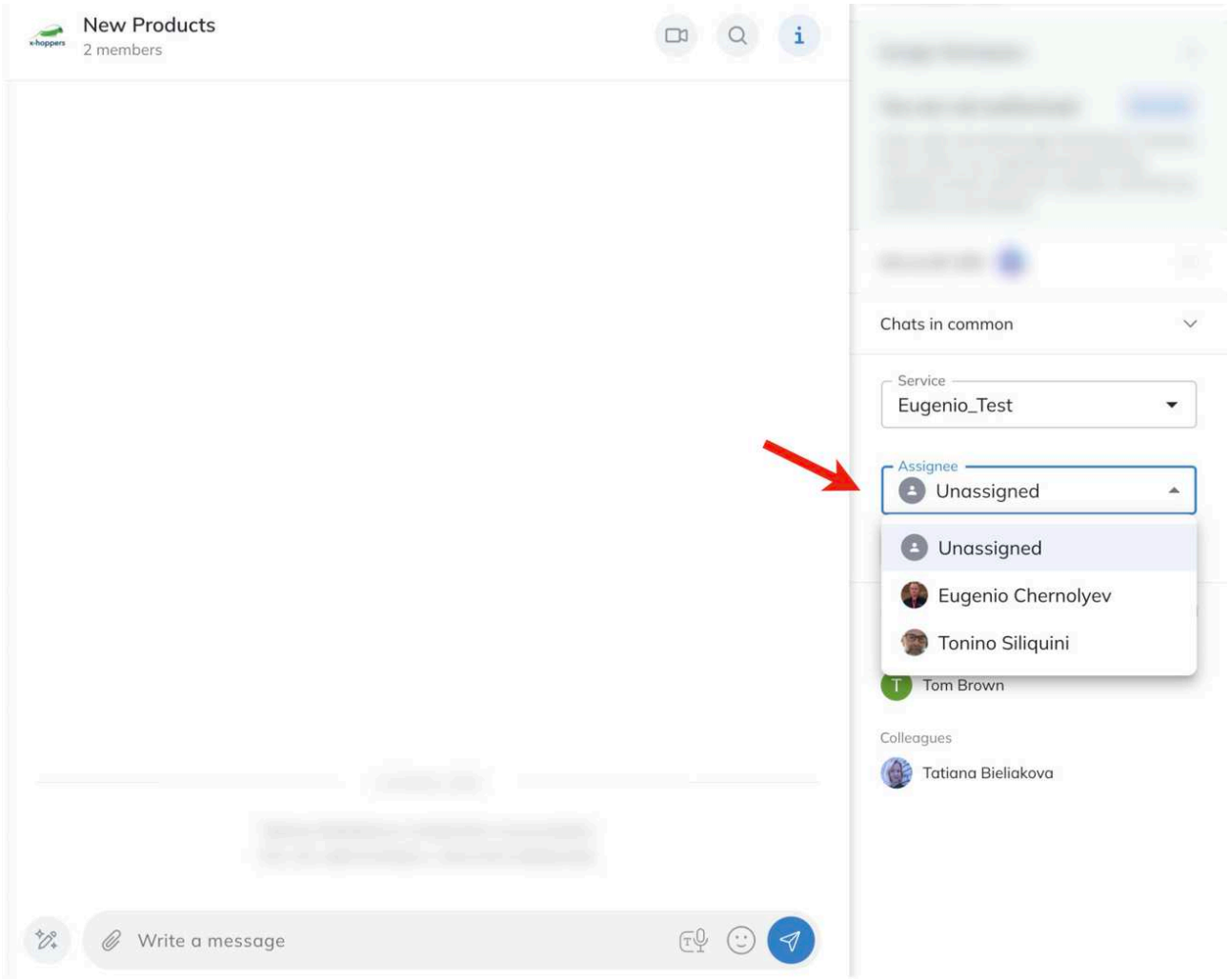
In case there is at least 1 external member in a conversation, there is an option to assign the conversation to a service (Call group). On the Info frame, click the button **Assign** next to the option *Service not assigned*:



Select the necessary service and click **Apply:**



If needed, you can assign the conversation to a particular member of the selected service. For this, click on the *Assignee* field and select the relevant member whom the conversation should be assigned to:



Once you select the assignee, the conversation is automatically assigned to the selected member. When an external user writes a message to a Service, which they already contacted before, the conversation is reused.

If the assigned agent leaves the conversation and external user writes a message, the agents belonging to a Service are added back to the conversation (all agents belonging to the Service are added, even if the conversation was assigned to a particular agent). The conversation is assigned to the Service (rather than to the previously assigned agent).

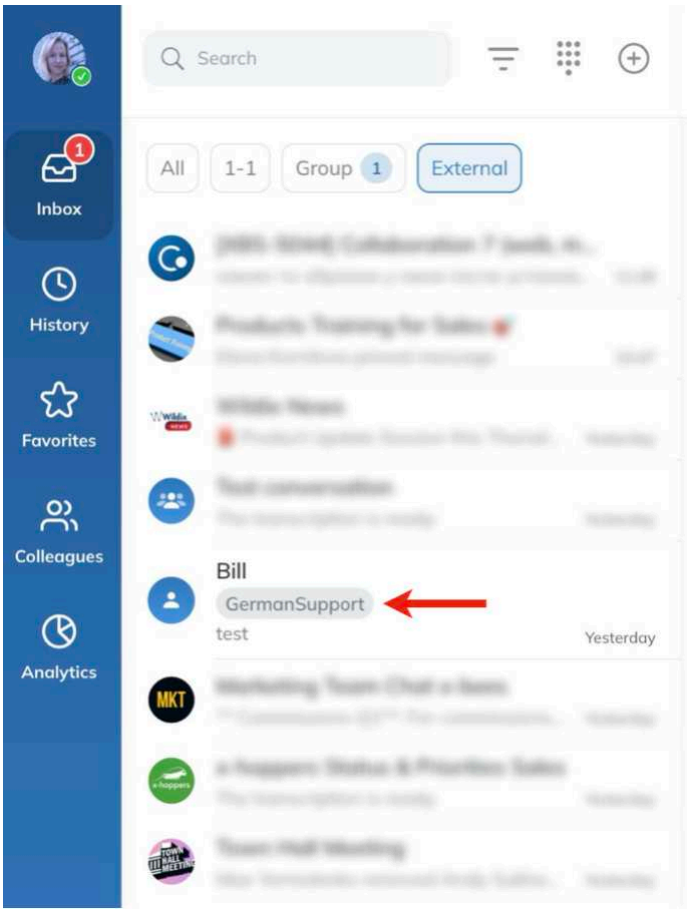
Note:

- If external user writes a message in less than 2 seconds after agent leaves, the agent is not added, unless the external user writes another message.
- Only agents with UC-Business and UC-Premium licenses are added to the conversation.
- In case conversation Service was changed (e.g. external user stated communication with particular group of agents (Service A), but then the service was changed (e.g. to Service B)), agents from the service which external user originally wrote to (Service A), are added back to the conversation.

- In case agent didn't respond to an external user message (including SMS) in a conversation assigned to a Service within 60 minutes or more, a Call group manager is automatically added to this conversation. Also, the manager receives an email about the conversation. Call group manager details are taken from *WMS -> Dialplan -> Call groups* tab -> relevant Call group settings -> *Missed calls manager* field.

Conversation tags

Under conversations with external users, you can find the relevant Service (Call group) or Company from CRM integration, if available:



Service tag is displayed if the conversation is assigned to a service.

Email notifications about unread messages

Collaboration 7 sends email notifications about unread messages so that you don't miss anything out. The emails include the name of conversations (maximum 5 latest conversations) and the number of unread messages, as well as “Open Collaboration 7” button, which leads directly to the relevant Collaboration 7 conversation.

The logic of sending email notifications is the following:

- In case a user doesn't read Collaboration 7 conversations with new messages, there are maximum 3 emails a day with such intervals:
  - 1st email is sent within 5 minutes after receiving the message
  - 2nd and 3rd one – with intervals of 4 hours.
- In case a user reads new messages in all Collaboration 7 conversations, the timer is reset and there is a 5-minute gap (instead of 4 hours) between receiving a new message and getting email notification. In this case, user can receive more than 3 emails a day.

During the intervals, unread messages are accumulated and sent in one batch.

Note: In some cases, if user was just added to a conversation and immediately received a new message, the email notification about the new message may be received before the email "You have been invited to Collaboration 7".

You can unsubscribe from emails via the unsubscribe button. System emails, e.g. with one time password, are still sent, even after unsubscribing.

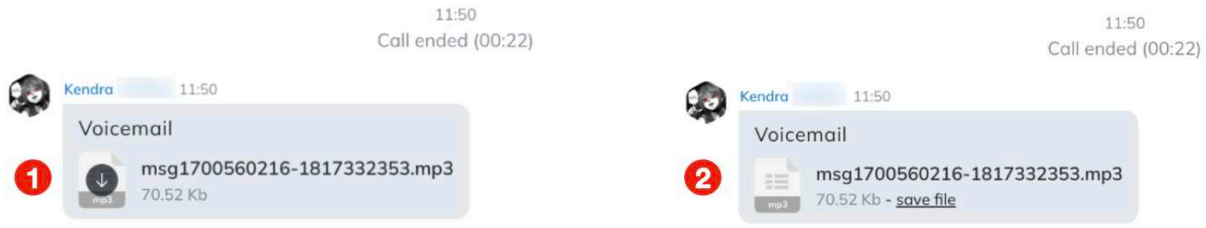
Email notifications are not sent if:

1. you logged in to Collaboration 7 mobile app, as you get push notifications on mobile;
2. conversation is muted;
3. you unsubscribed from email notifications.

View voicemail and faxes

Voicemails and faxes are displayed as separate messages with attachment in Collaboration 7 conversation.

To view fax or listen to voicemail, you need to download the file on your device and open it. For this, click on the down arrow icon (1) and then click *Save file (2):*



Note:
- The read indicator is not displayed under fax/ voicemail messages.
- If user removes conversation members (in case of an assigned service) or leaves the conversation that was created for a new fax / voicemail, the member(s) are automatically added back to the conversation when the same external user sends another fax/ voicemail again.

Current limitations:
- Fax message currently doesn't include the information about remote ID, status and the number of pages.

- In the conversation with external user who has only phone number indicated, the system allows sending messages. Though the message can only be delivered if you have CLASSOUND DID for 2-way SMS sending and the conversation was assigned to a Service with the SMS number (see more in the documentation How to send and receive SMS/ MMS via CLASSOUND).
- The title for a fax/ voicemail message is in English by default.

Send two-way SMS messages

Currently, two-way SMS functionality is available for UK, US/ Canada, Belgium, Denmark, Poland, Sweden, Austria, Brazil, Colombia, Estonia, Finland, France, Ireland, Netherlands CLASSOUND DIDs. You can read more in the document How to send and receive SMS/ MMS via CLASSOUND.

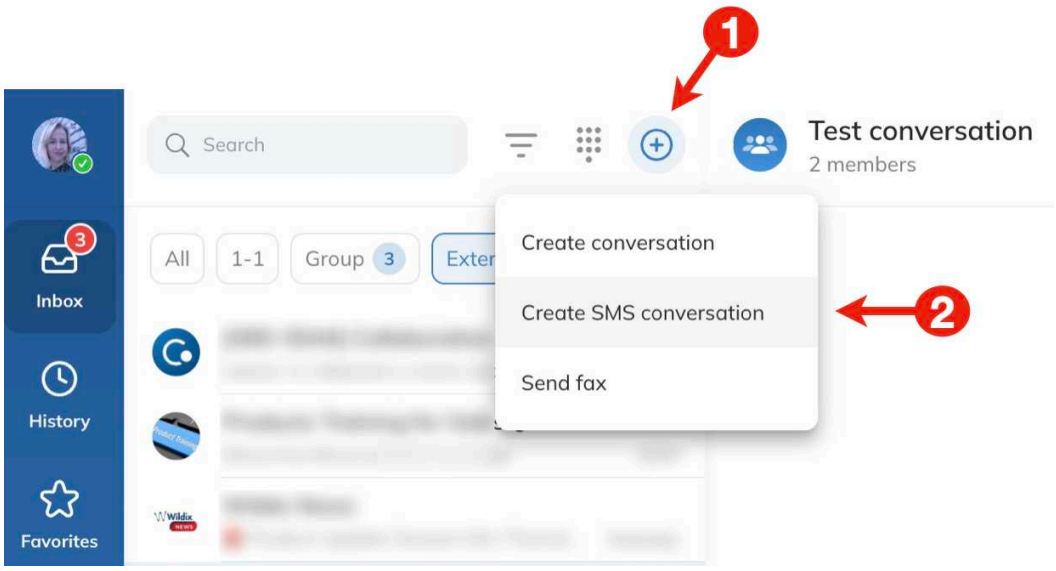
Requirements

- Activated CLASSOUND
- CLASSOUND DID configured as SMS number in *PBX -> Integrations -> Cloud Integrations -> SMS* section (see detailed instructions in the guide How to Configure SMS and WhatsApp Conversations in WMS). Otherwise, the option “Create SMS conversation“ is not available.
- The relevant country code set in *WMS Settings -> PBX -> Language and Region*

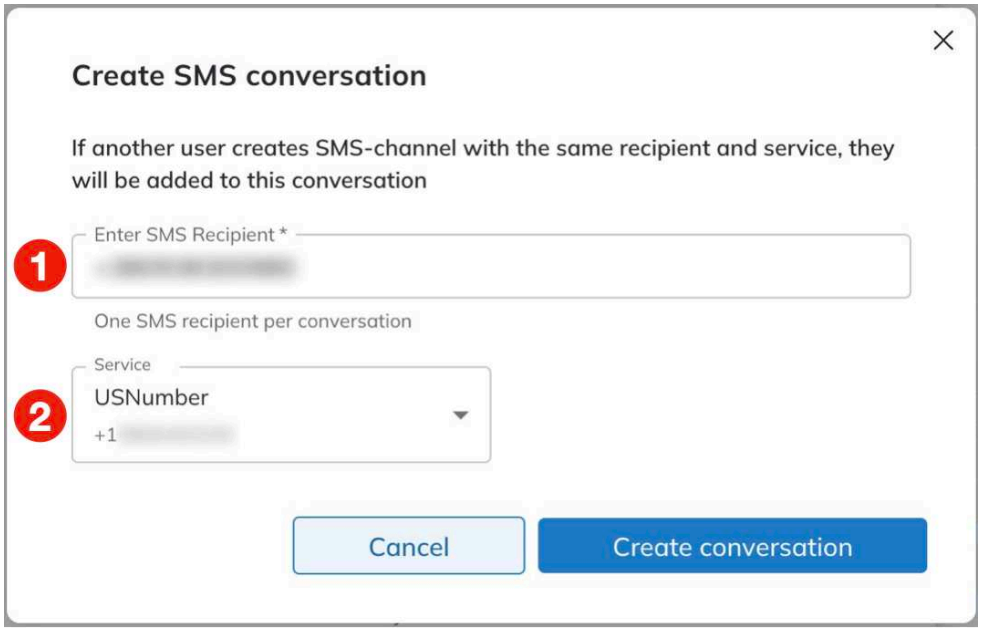
Important: SMS can be sent only to E.164 international format numbers

How to send SMS

1. Click on the **+** button on the top panel (1) and select **Create SMS conversation** (2):



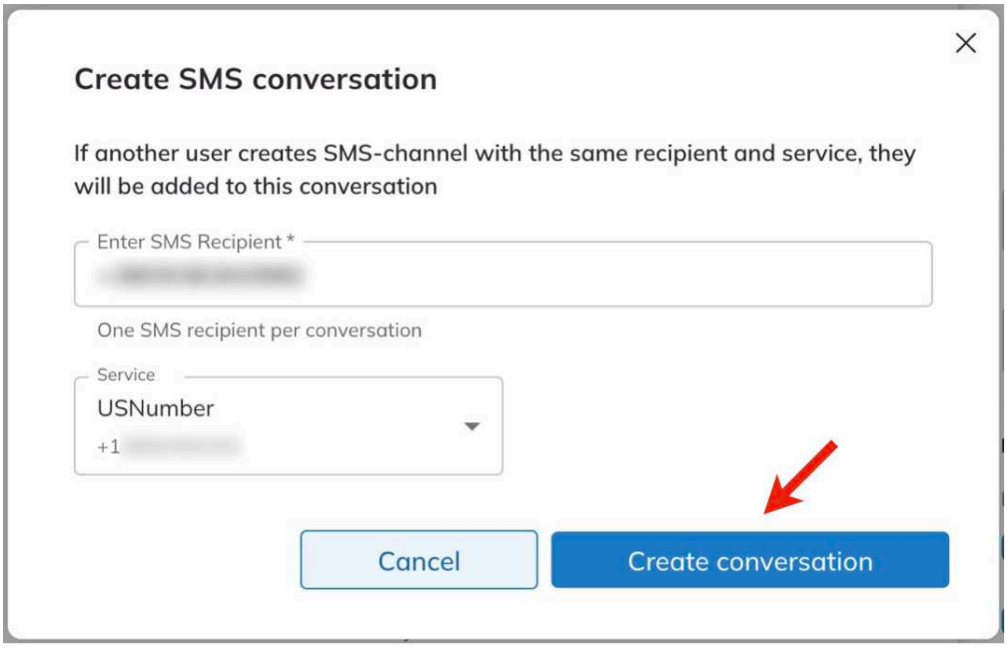
2. Enter the recipient's phone number or contact name (1) and choose *Service* (2):



Limitations:

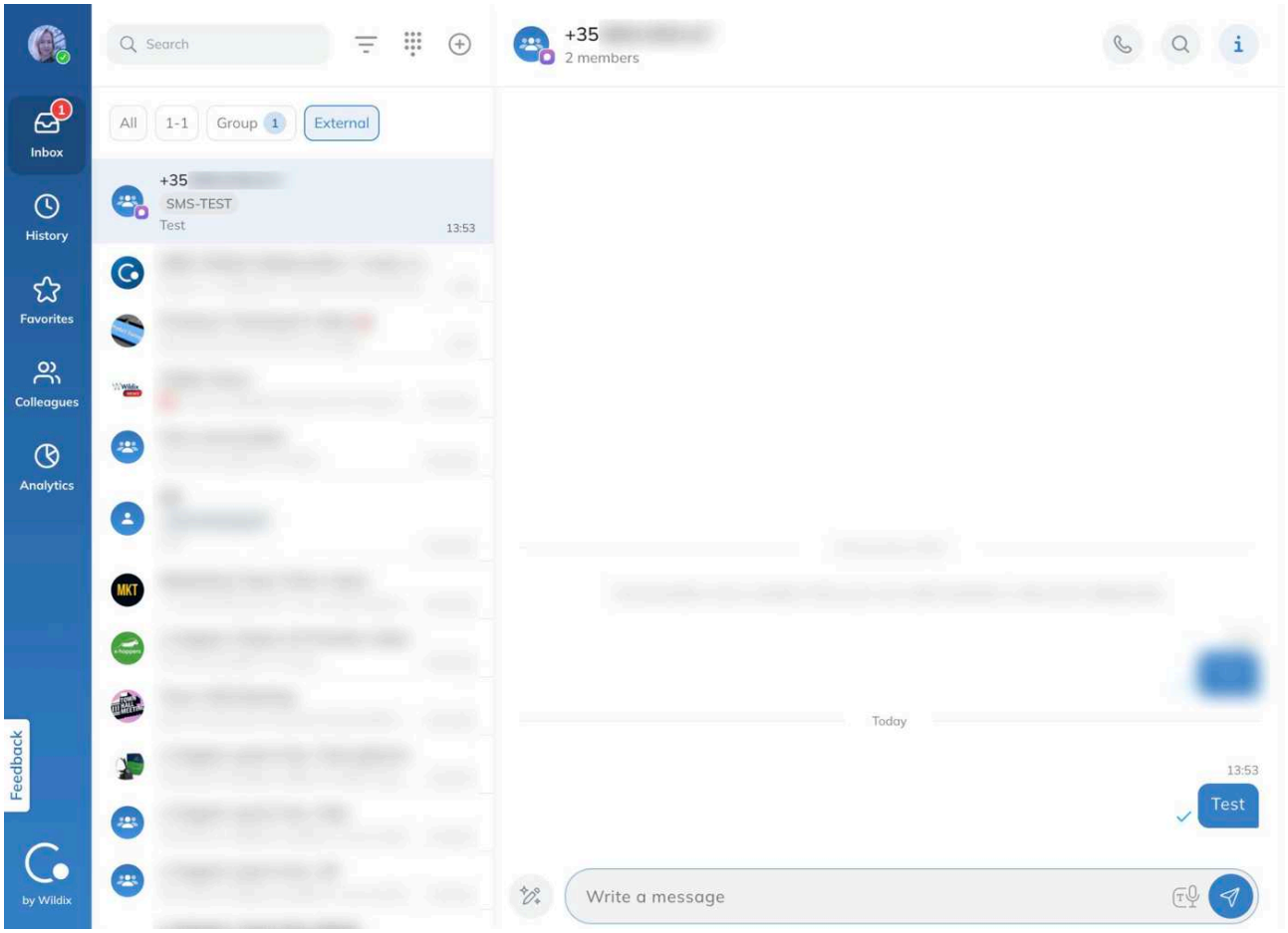
- Only one SMS recipient is allowed in SMS conversation (sending SMS to multiple users via SMS conversation is not supported).
- The list of Services includes only Services (Call Groups) with SMS number added in WMS.
- Service cannot be changed after SMS conversation is created.

3. Click **Create conversation**:



Note: If agent tries to create a new SMS conversation but SMS conversation with the same Service for the current SMS number already exists, the agent is added to the existing conversation.

4. In the created conversation, type your message and click **Send:**



Note:

- The maximum number of characters allowed in the input message field is 670.
- Sending MMS is currently possible for US/ Canada DIDs only. See the section *Two-way MMS* below.

When an external user replies, the SMS message appears in the conversation.

Note:

- An agent can add internal members to the conversation, assign or reassign the conversation to Service members. Adding external users to SMS conversation is not allowed.
- If all participants left the SMS conversation and the customer sends an SMS, all service (Call group) members are added back to the conversation to ensure the customer's response is received.
- Incoming SMS and WhatsApp messages to the same CLASSOUND DID are added to the same conversation rather than to separate chats.

Send two-way MMS

Currently, two-way MMS functionality is available for US and Canadian DIDs.

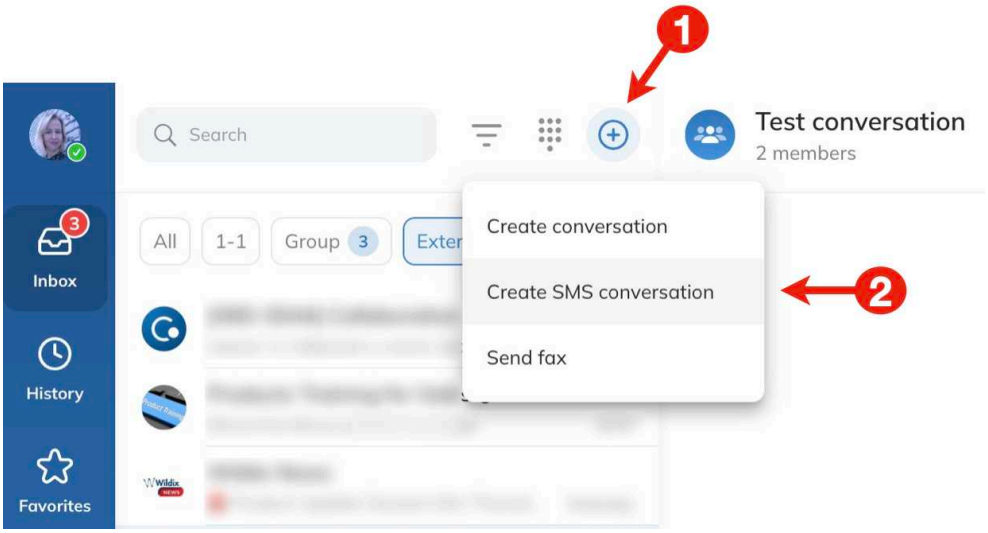
Important: MMS can be sent only to E.164 international format numbers

Requirements

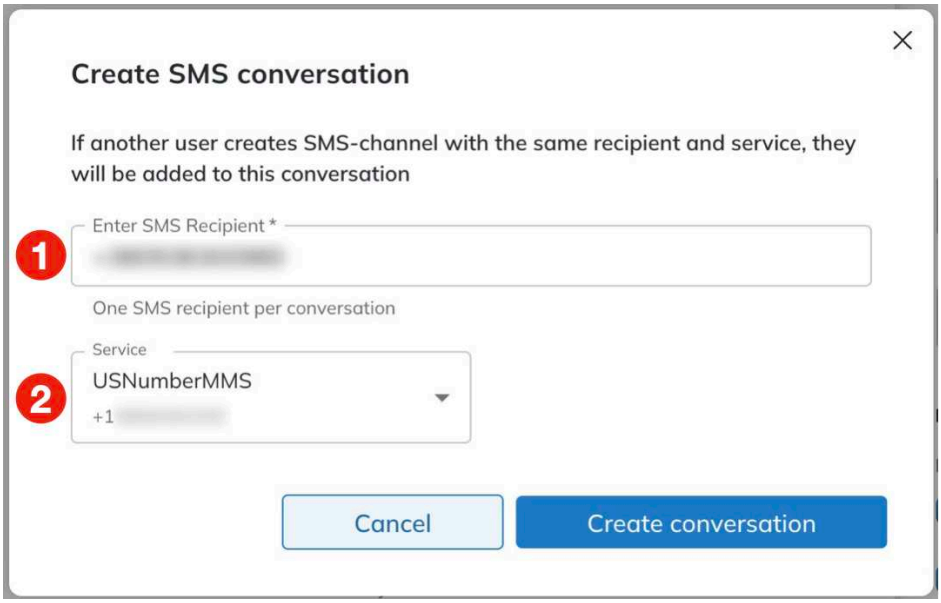
- Activated CLASSOUND
- CLASSOUND DID configured as SMS number in *PBX -> Integrations -> Cloud Integrations -> SMS* section (see detailed instructions in the guide How to Configure SMS and WhatsApp Conversations in WMS). Otherwise, the option “Create SMS conversation“ is not available
- The USA Country Code (+1) set in *WMS Settings -> PBX -> Language and Region*

How to send MMS

1. Click on the **+** button on the top panel (1) and select **Create SMS conversation** (2):



2. Enter the recipient's phone number (1) and choose *Service* (2) and click **Create conversation**:



Note:

- Only one recipient is allowed in SMS conversation (sending MMS to multiple users via SMS conversation is not supported).
- The list of Services includes only Services (Call Groups) with SMS number added in WMS.
- Service cannot be changed after SMS conversation is created.
- If agent tries to create a new SMS conversation but the conversation with the same Service for the current number already exists, the agent is added to the existing conversation.

3. In the created conversation, click on the **Attach** button to the left of the message field
4. Choose the file you want to send and press **Send.** The MMS message gets sent

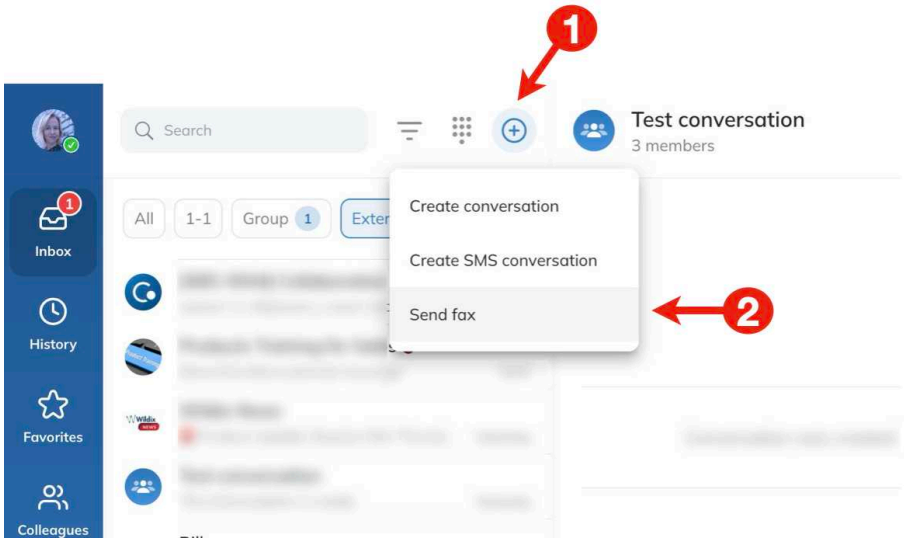
Note:

- You can find the list of supported files on this page: List of Supported File Types for Two-Way MMS
- The allowed number of files that can be sent in a MMS is 10.
- The maximum allowed size of MMS message is 3.5 MB. When adding multiple files, if their total size exceeds the 3.5 MB limit, some of the files are deleted so that the remaining ones are not more than 3.5 MB.
- When sending a text message along with an attachment, the text is sent as an SMS and the attachment as MMS. In this case, the same text limits apply as for SMS: 670 characters.
- In case of sending a text file, the operator transforms the file into text, so the recipient receives an SMS (or several SMS, if the length of the original message is more than 4500 characters).

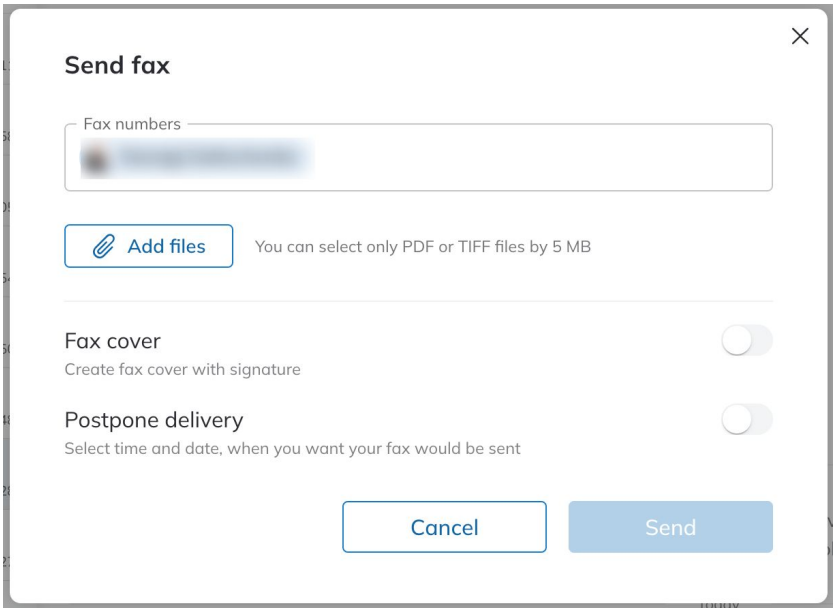
Send Fax

It is possible to send faxes via Collaboration 7. To do it, follow the steps below:

1. Click on the + button on the top panel (1) and select **Send fax** (2):

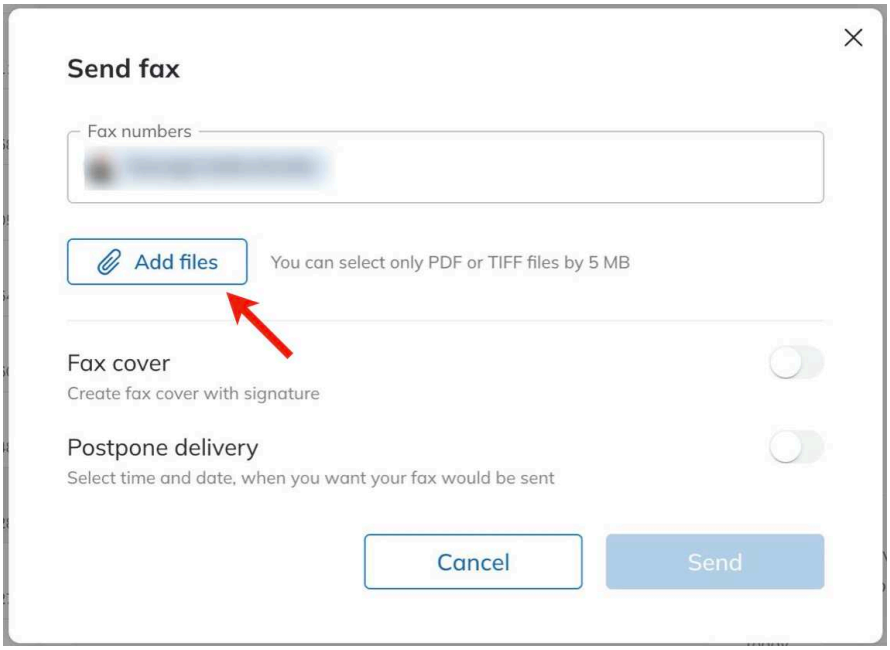


2. In the *Fax number* field enter the necessary number(s) or search for user(s):



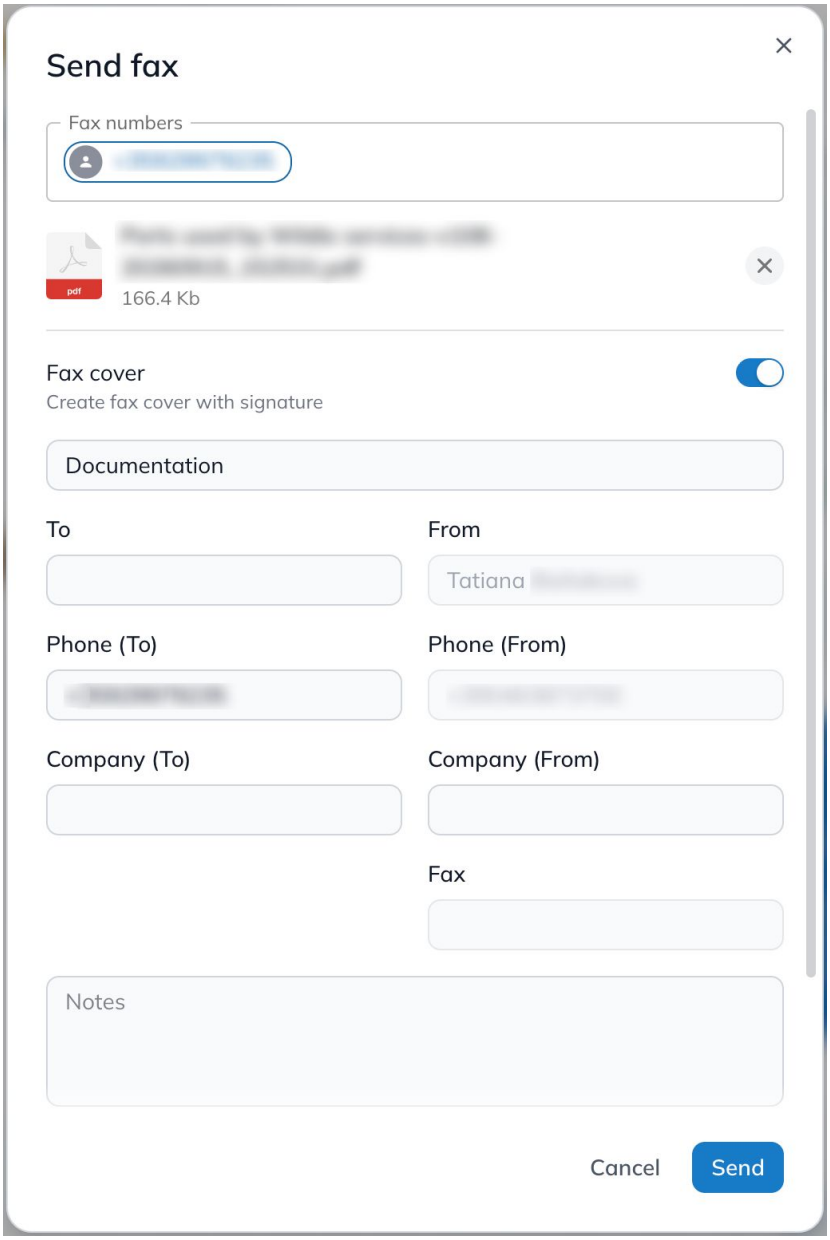
⚠ Note: Only users with Fax number are displayed in the Search results on the Send fax screen.

3. Press **Add files** and choose the necessary file or drag and drop the file

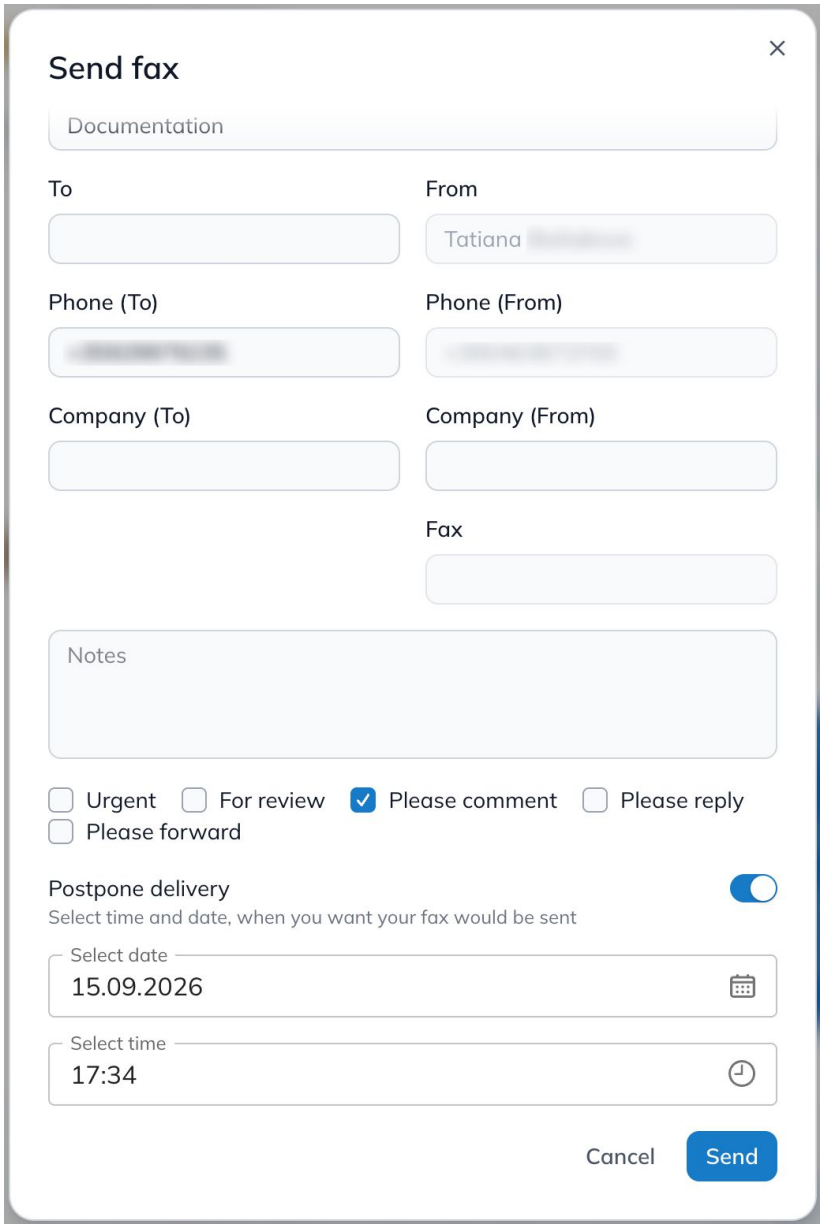


Important:
- It is possible to send only one file at a time.
- Supported file types: pdf or tiff.

4. If you want to set fax cover, enable the toggle **Fax cover** and fill out the necessary fields:



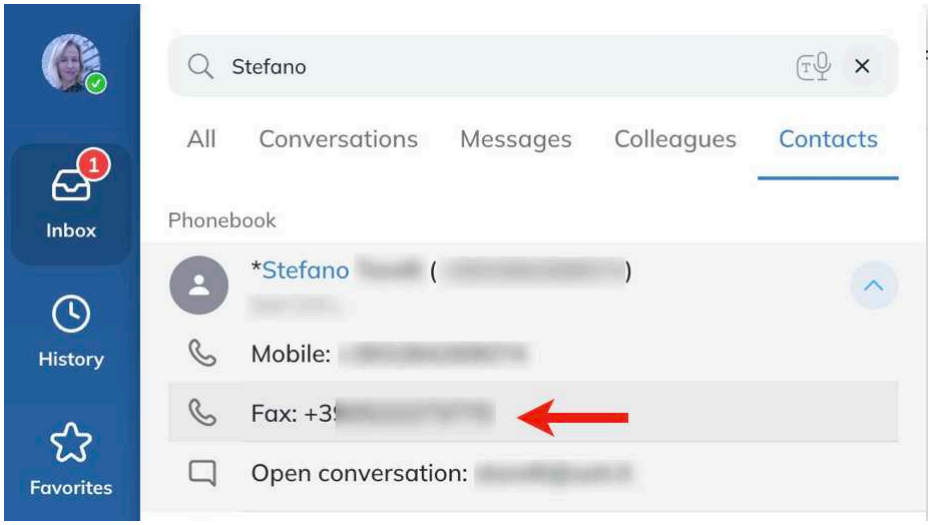
5. Configure Postpone delivery if required:



6. Click **Send**

Alternatively, to open the Send fax screen, you can:

- search for a user in the Search field and click on the **Fax number**



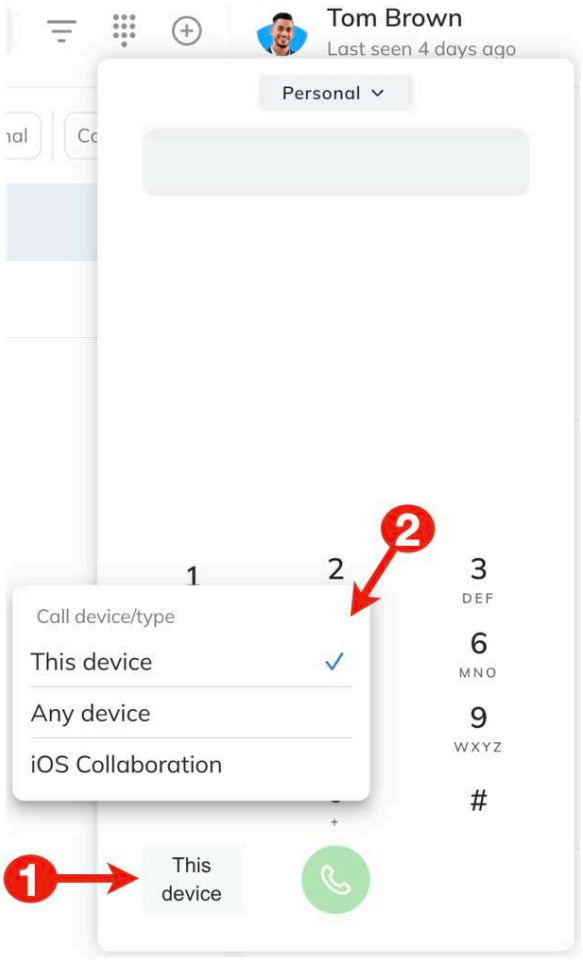
Calls

Select an active device for calls

You can make and receive calls directly from Collaboration 7 or control other devices registered to your account, including hardware phones (WP, W-AIR), W-AIR Headsets, smartphone apps (iOS / Android) and mobility extension (mobile phone). The first available device is displayed to a user upon the first login.

To select the active device for making and receiving calls:

- Click the **Dialpad** icon from the top menu
- To the left of the green Call button, click **This device**
- Select the preferred option from the list (e.g. Android, iOS, Any device, etc.)



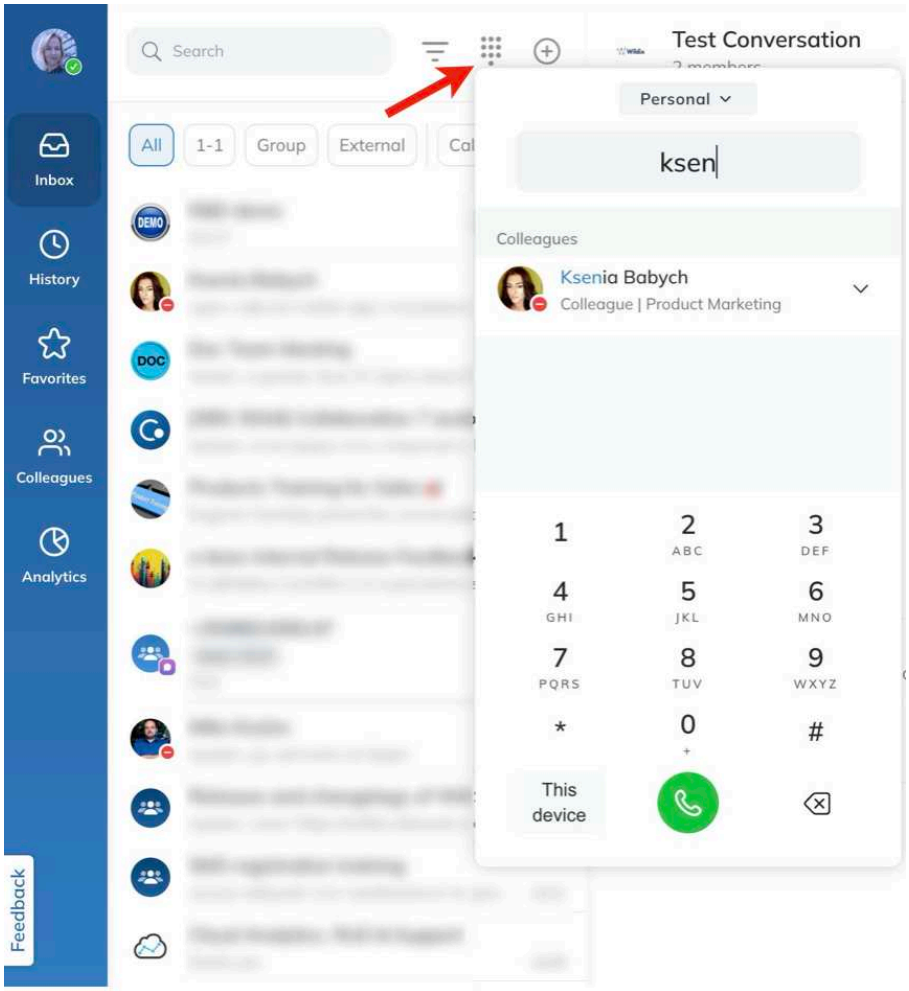
Outgoing and incoming calls are received on the selected device, until another device is chosen.

Note: Active device selected in the Dialpad on web is synced across different web apps
- Min. supported WMS version 7.06.20251217.1 and higher

Start a call from Dialpad

You can start an internal or an external call from the Dialpad:

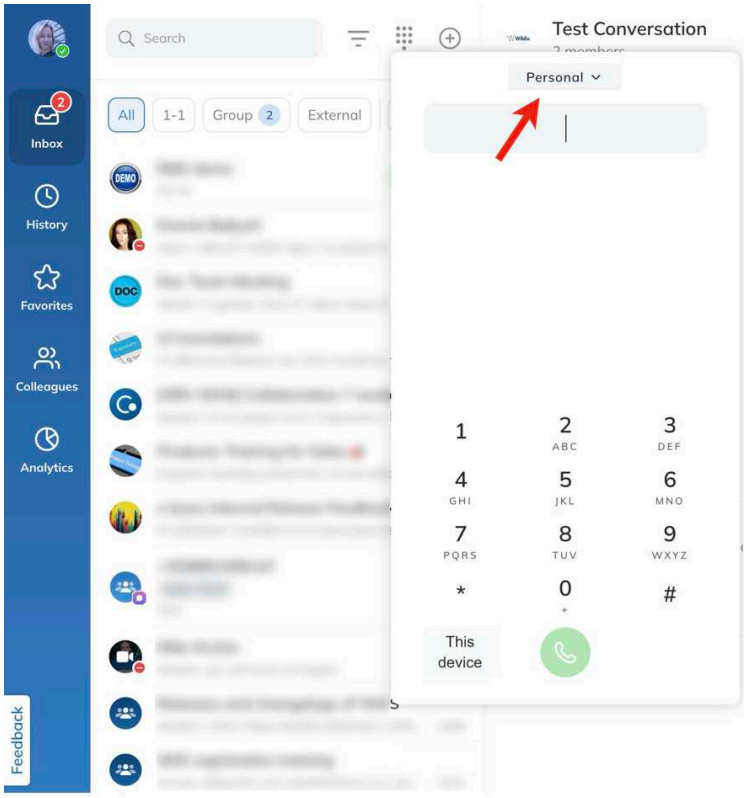
1. Click the **Dialpad** icon from the top menu
2. Type a name of a user, a phonebook contact, CRM contact, or just enter a phone number into the field
   - In case a contact has more than one number, click on the arrow next to the match, to view the available options
3. Click on the green **Call** icon from the Dialpad to start a call



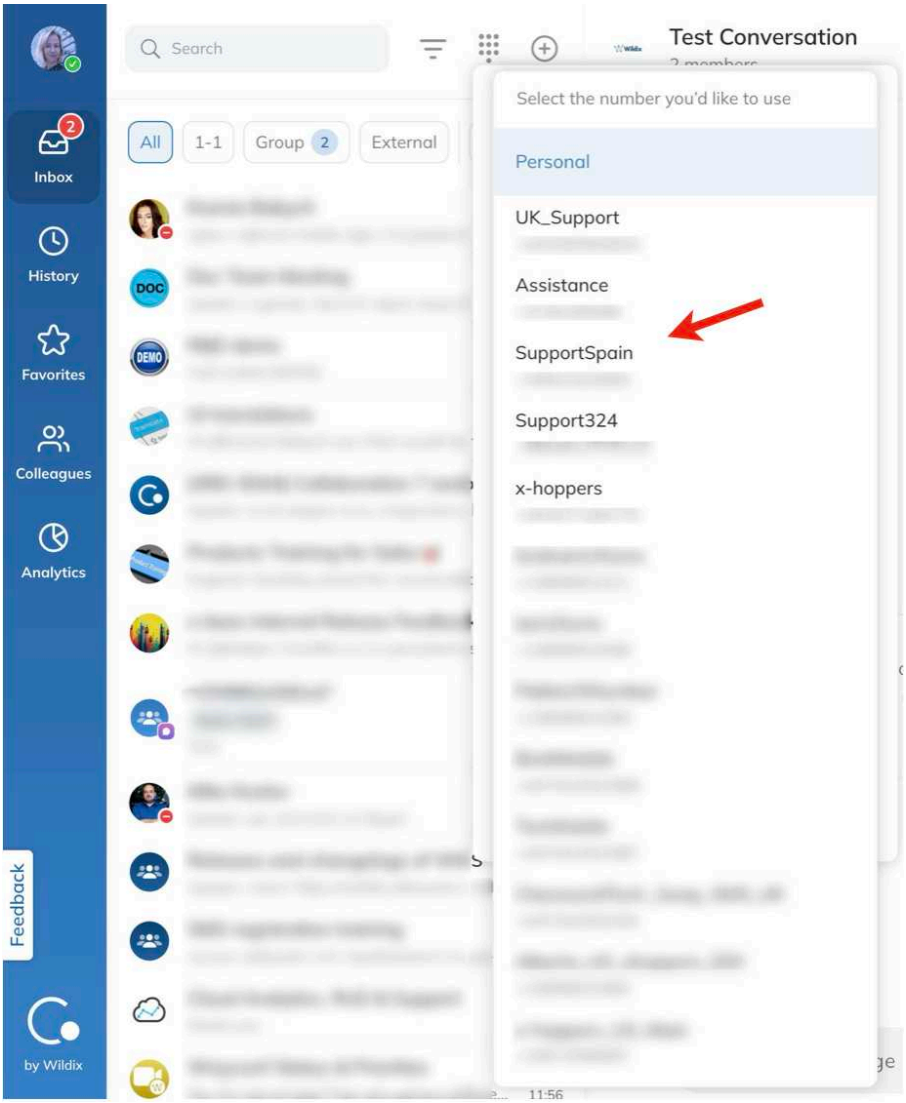
Selecting Caller ID for outbound calls

If you need to make an external call, but don't want to show your office phone number, you can select the phone number of the relevant service (e.g. tech support, sales, accounting, etc.) before placing a call:

1. Open the **Dialpad**
2. Click on the drop-down list at the top



3. Select the service (Call group) and make a call



4. The call is performed using CID for outbound calls of the selected Call group (by default, the option “Personal” is displayed)

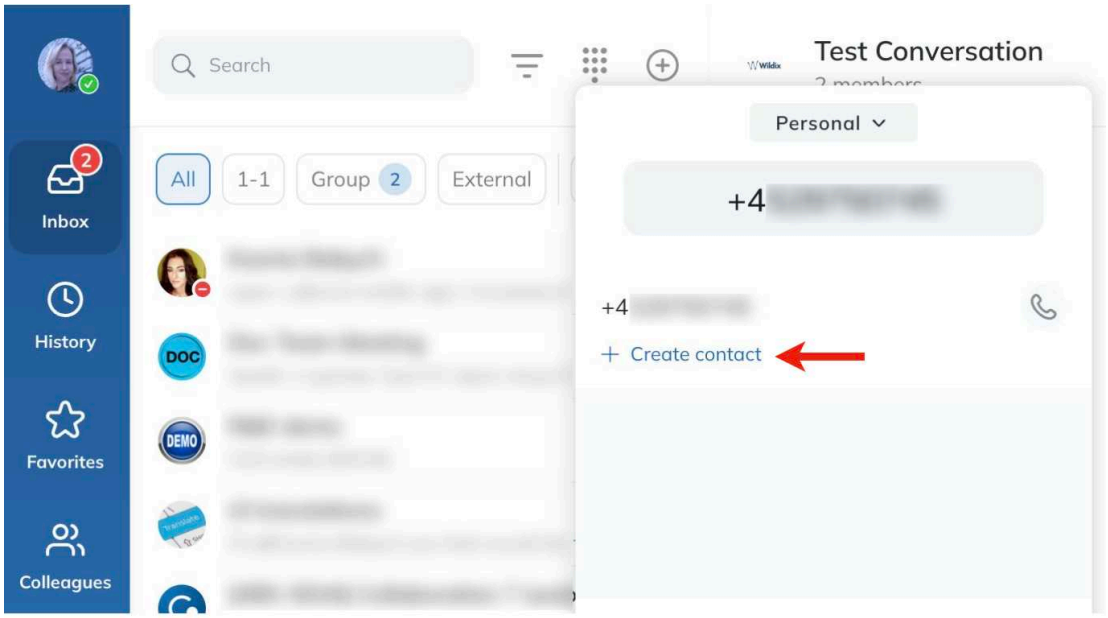
⚠ Note: To set up Caller IDs, go to WMS -> *Dialplan* -> *Call groups* -> select a group -> click Edit strategy and specify CID for outbound calls.

⚠ Note: The service (Call group) you select in the Dialpad will be applied globally, including WP 5 phones.

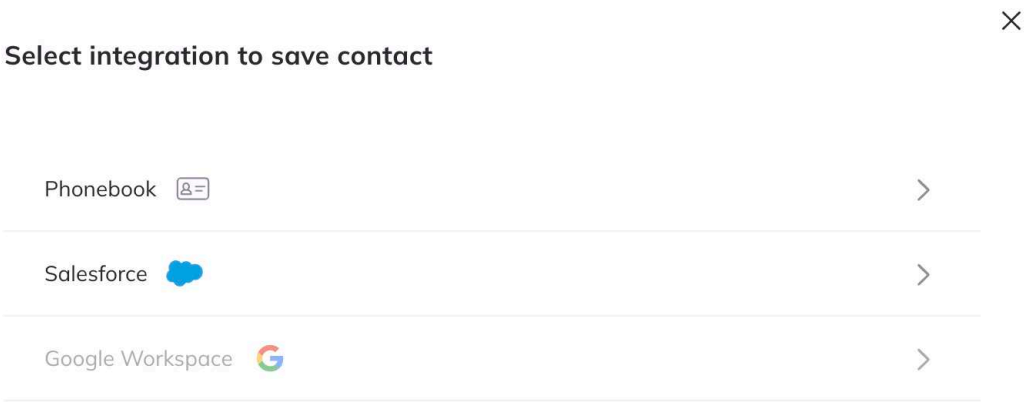
Create contact

In case you enter a phone number in the Dialplan and there is no contact found, you have an option to create a contact:

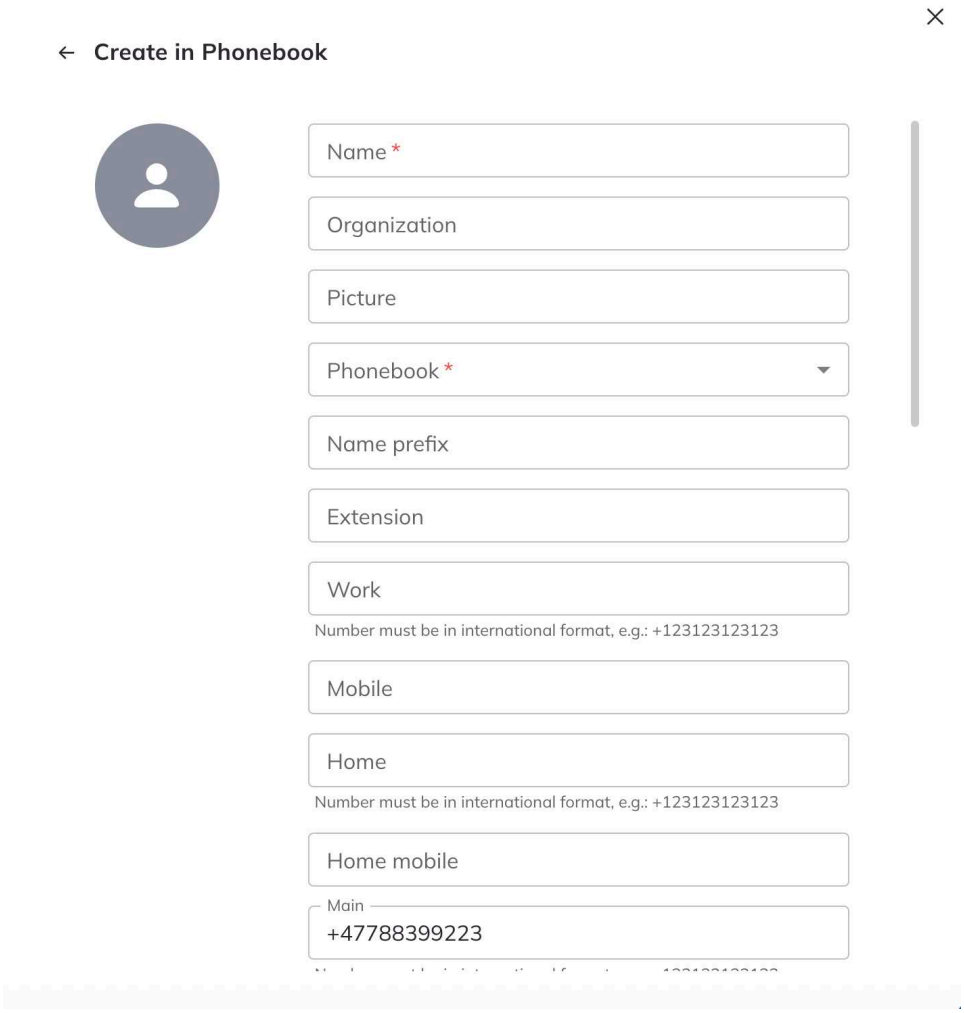
1. Click **Create contact** button:



2. Select which integration to save the contact to



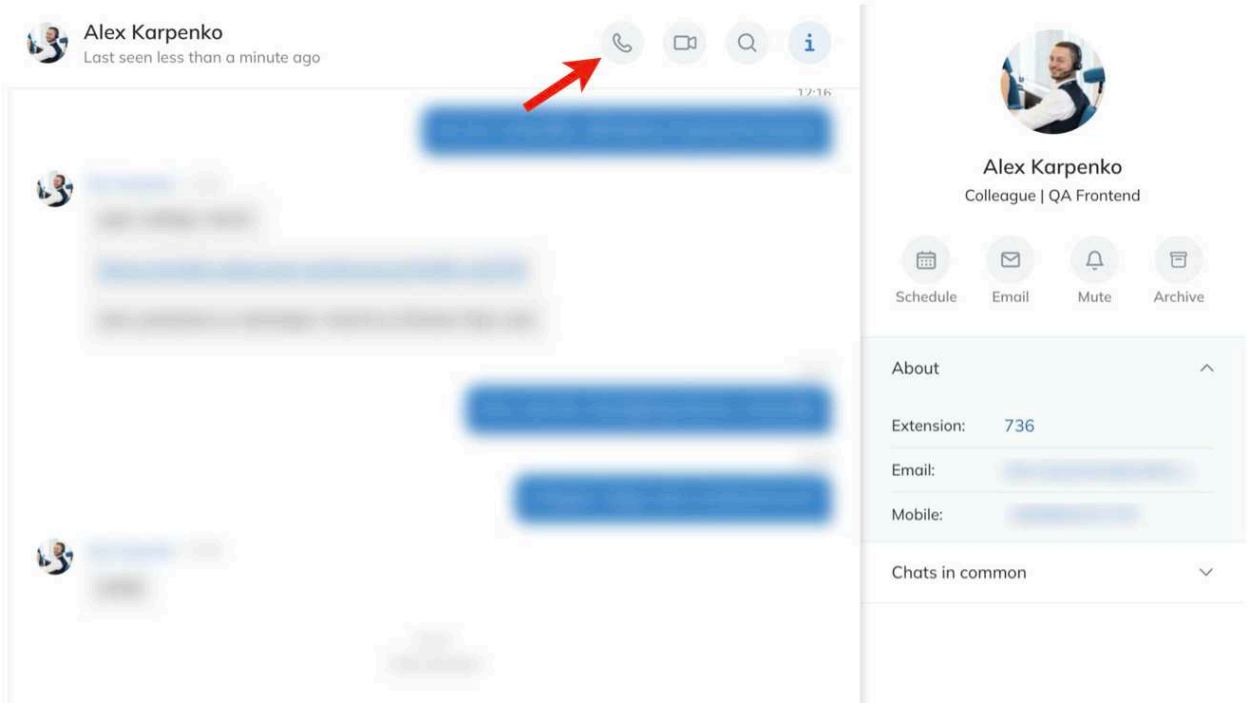
3. Fill out contact details and click **Add**



Call from Conversation

The Call option is only available in one-on-one conversations with other PBX users:

- Click on the **Handset** icon from the upper right-hand part of the conversation



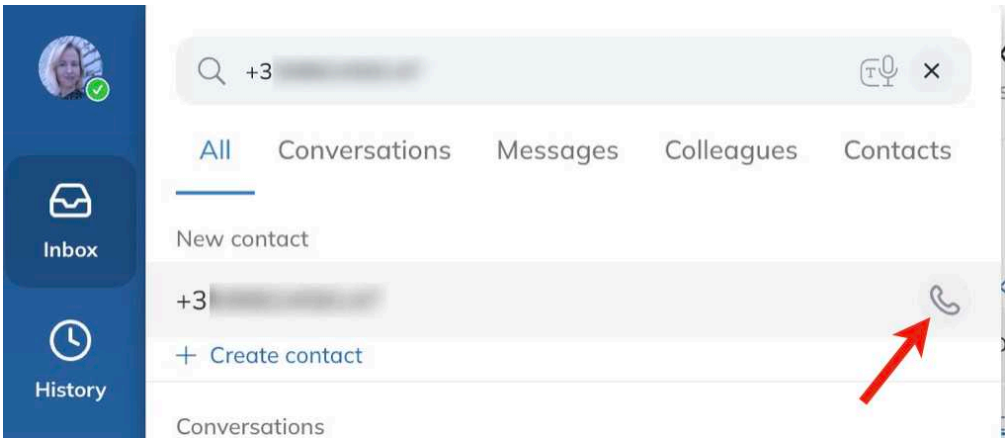
Note: Currently there's no option to select an active device, calls are started via the Collaboration 7 interface.

Important: To have a full set of features (including video), it is recommended to start a call using the **Video** icon.

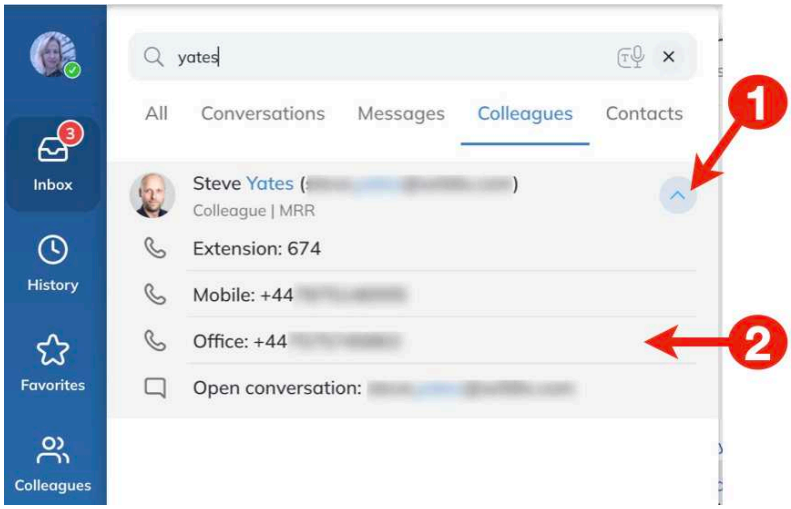
Call from Search

You can call existing or new contacts directly from the Search field.

1. Insert or start typing a number/ email/ name into the Search field
2. Click the Phone icon to initiate the call



If an existing contact has several numbers, click **Arrow down** icon (1) and select a preferred option (2):



Choosing between the call option and video conference

If you need **telephony features**, such as:

- Transfer a call
- Put a call on hold
- Send DTMF

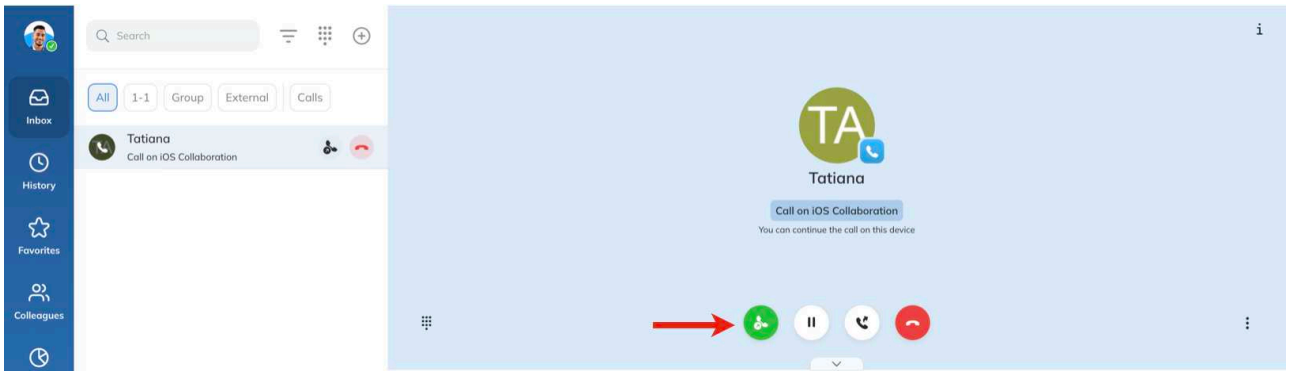
Then opt for the SIP call option. You can start a call from the Dialpad or from one-on-one conversations with colleagues.

If you need **screen sharing**, opt for the Video conference option from one-on-one or group conversations.

Manage calls

In case you have more than one active call, you can see them all from *Active conversation*s and switch between them.

Switch active device: all active calls can be seen and managed both from the web version and from the mobile app. If you started a call on the mobile app, you can continue it on the web version of Collaboration 7 (and vice-versa):

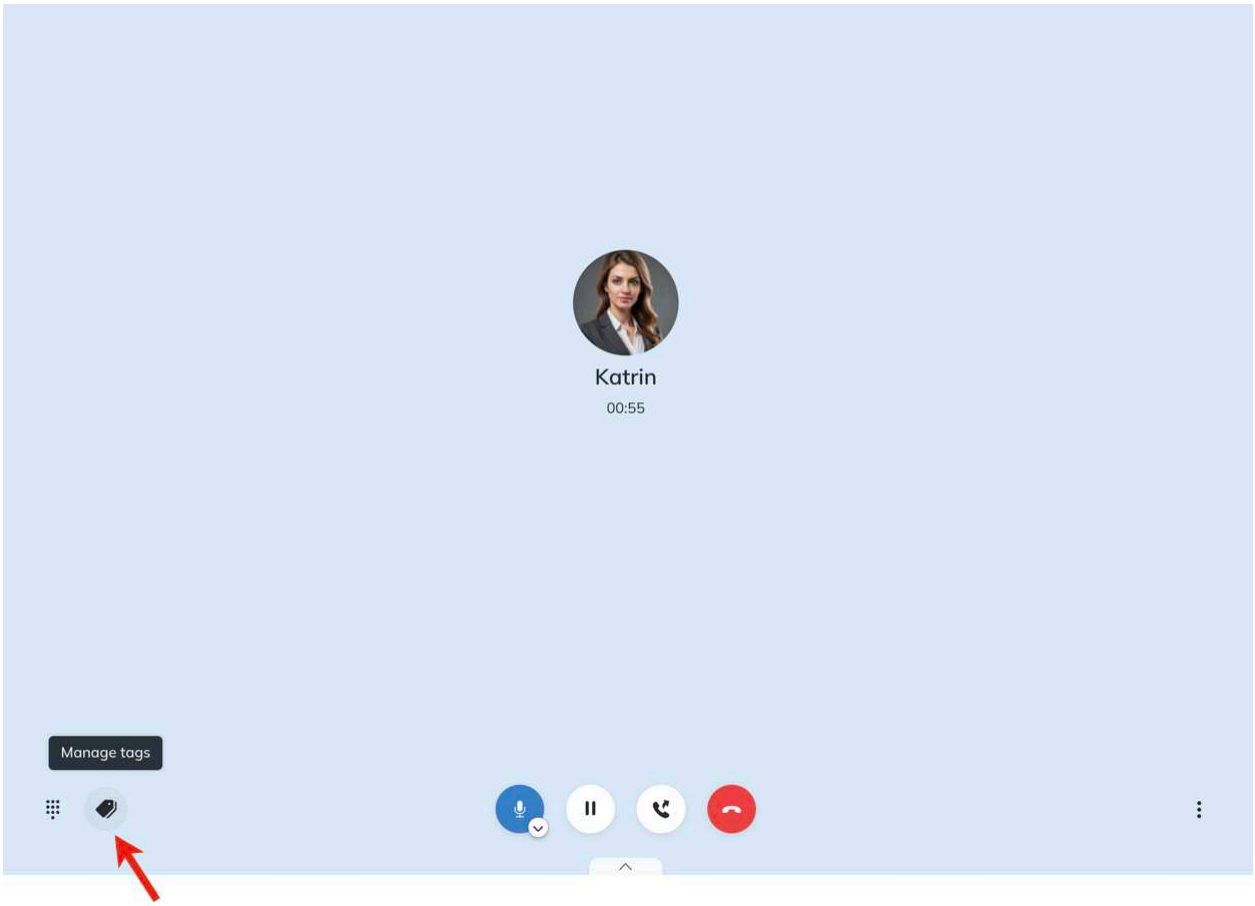


From the *Active call screen*, the following options are available:

- **Send DMTF**

> Note: If you paste number into the the DTMF area, all unsupported characters are automatically cut out.

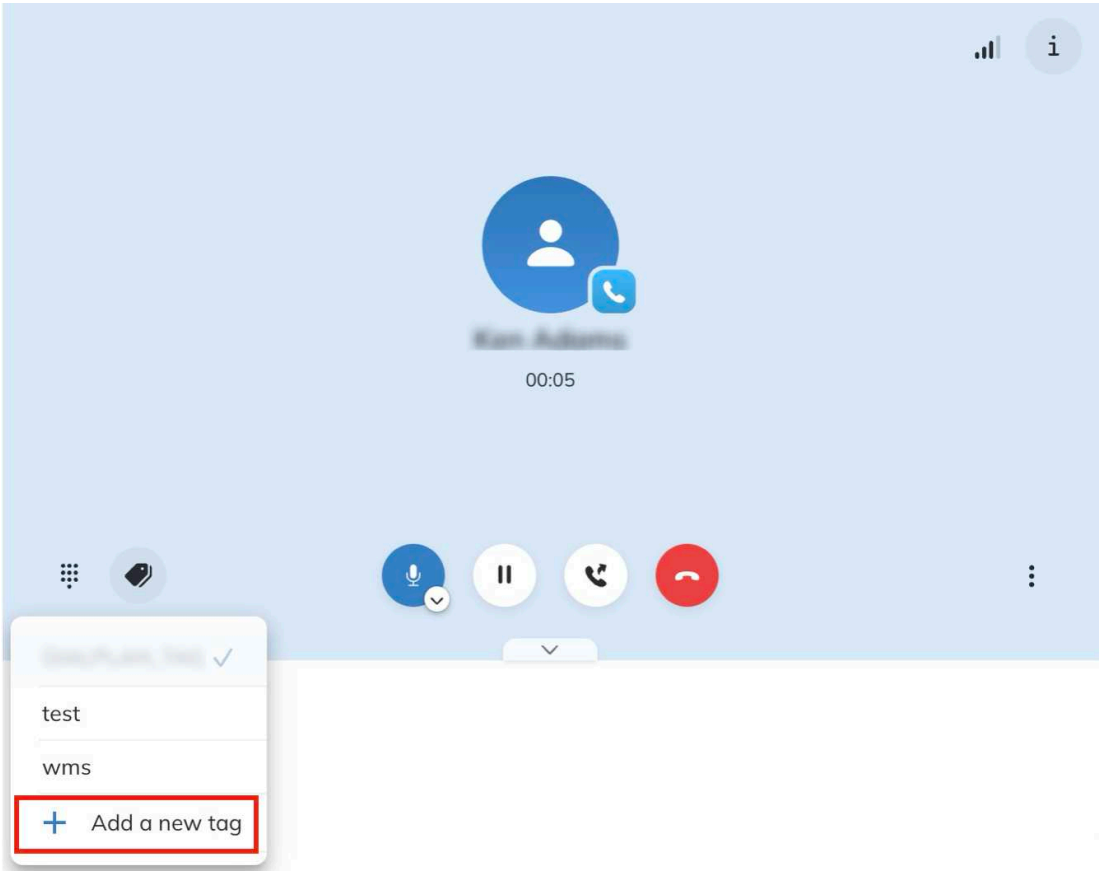
- **Manage Tags** (starting from WMS 7.01.20250409.1)



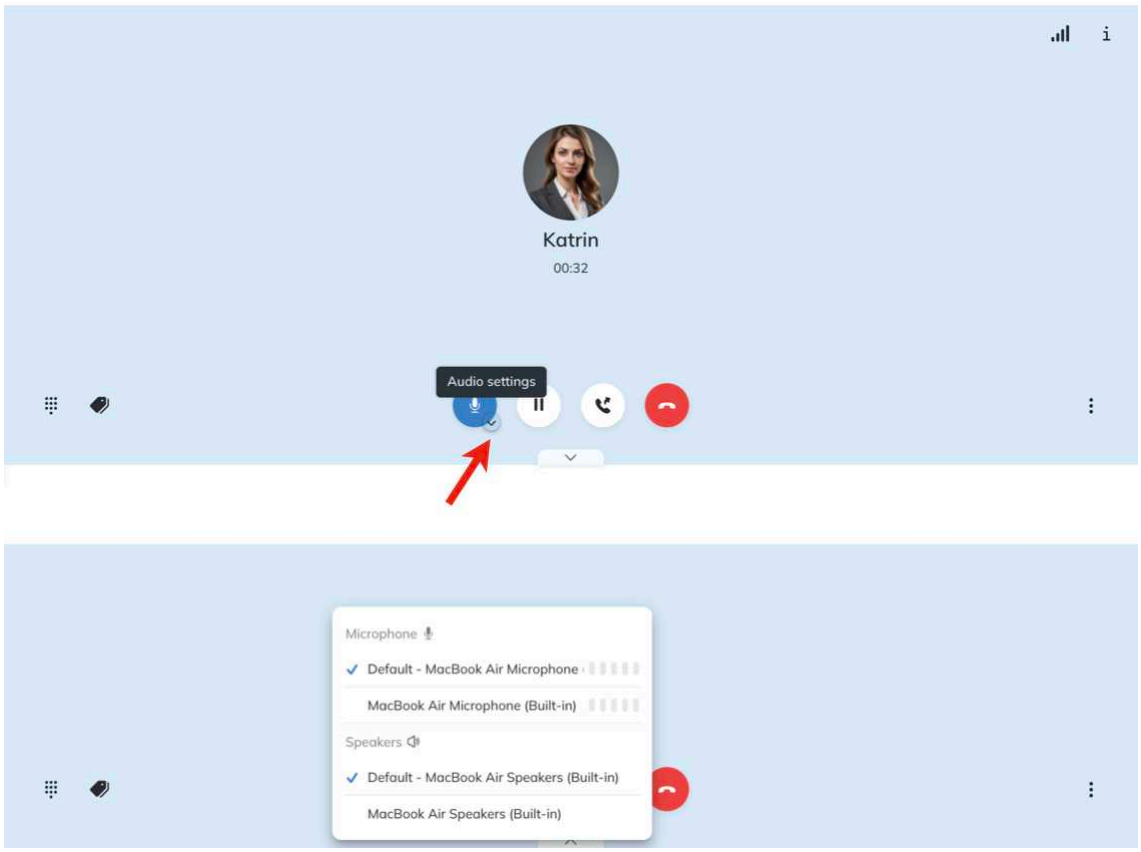
Also you can add custom tags during the active calls. To add a tag, follow these steps:

> Note:
> - This feature is disabled by default and can only be enabled by admin
> - The feature is available starting from WMS 7.07.20260303
>
> To enable, go to WMS -> PBX -> Call and chat history -> Settings, and enable the “Allow custom tags” checkbox

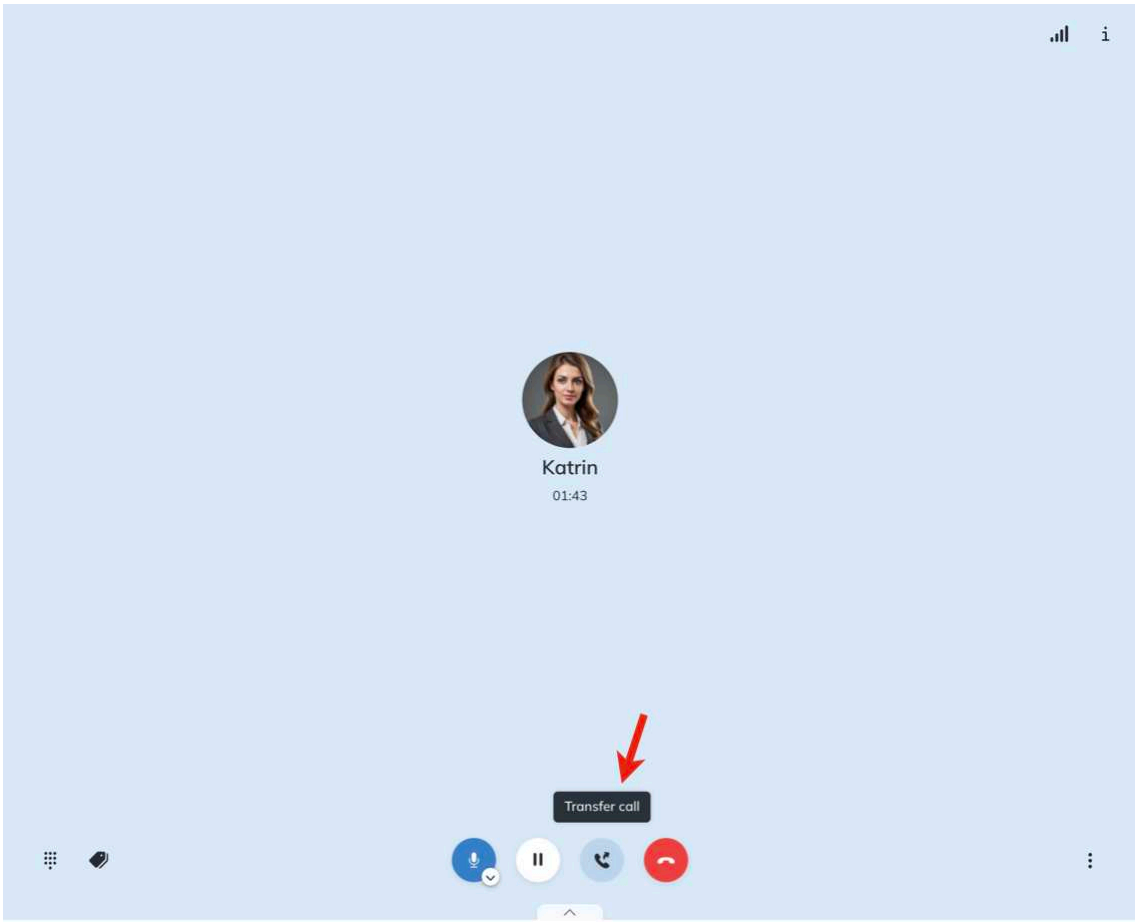
1. Click the **Manage tags** icon
2. Click the **Add a new tag** button
3. Enter the tag name and click **Add**
4. The newly created custom tag will be automatically attached to the current call



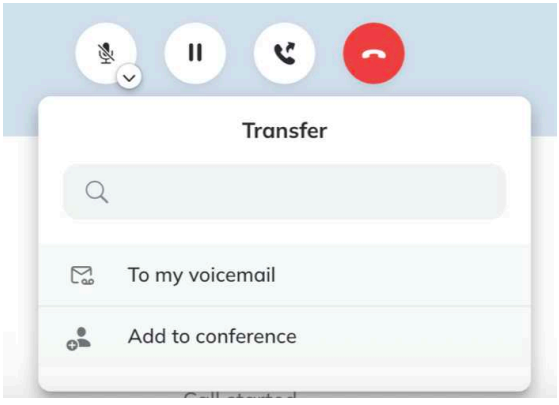
- **Mute/ unmute, manage Audio settings**



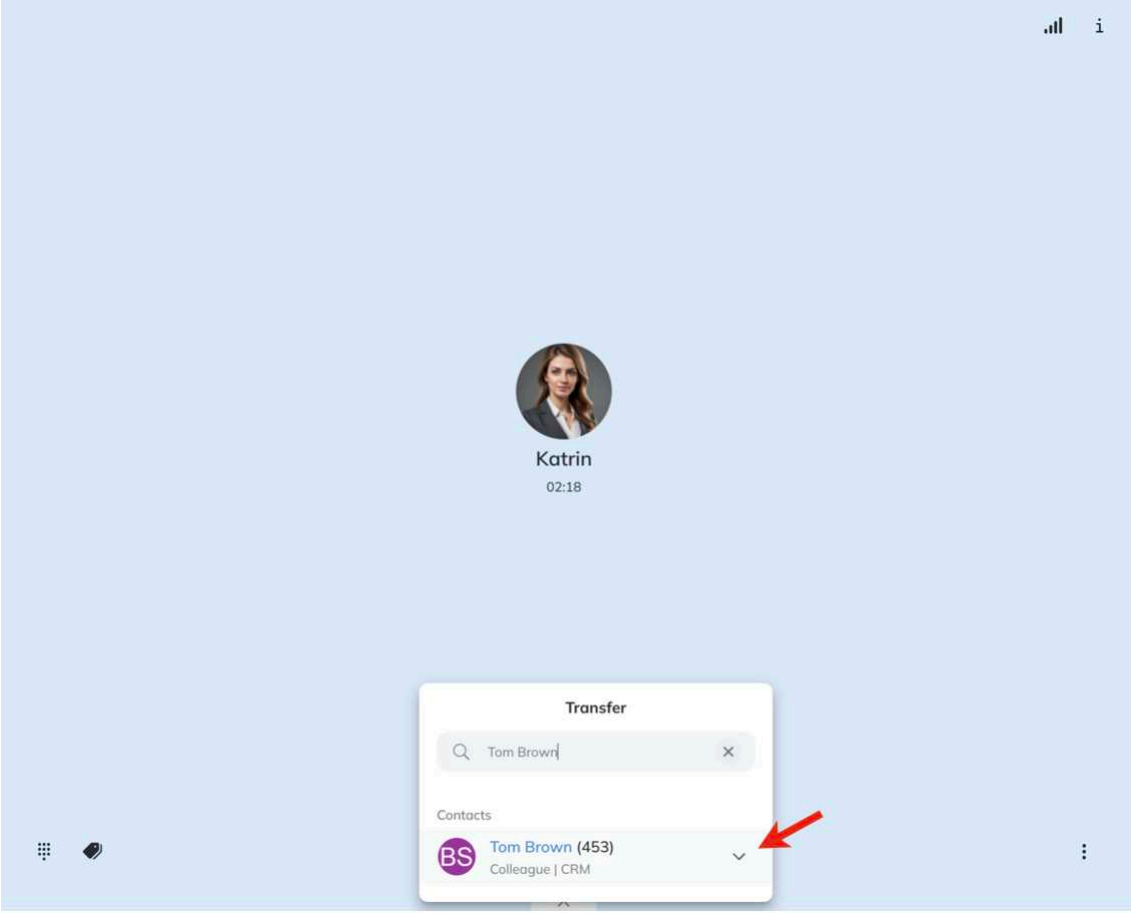
- **Hold/ resume**
- **End a call**
- **Transfer a call**: click on transfer call icon at the bottom of the call screen



The dedicated Transfer dialog appears, where you can transfer the call to another user, send it to your voicemail or add a user to a conference:

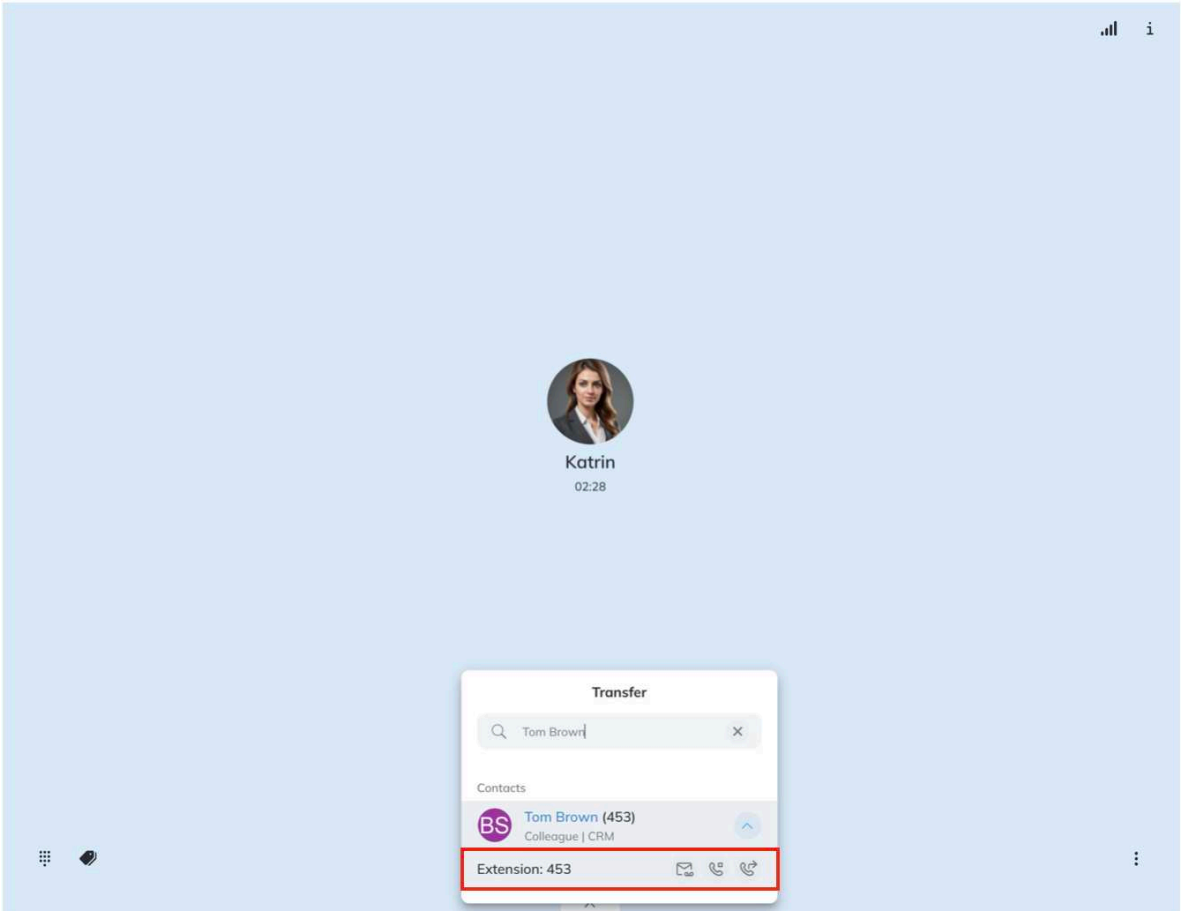


Start entering number, user name or extension and click the arrow icon next to the necessary user from the search results below:



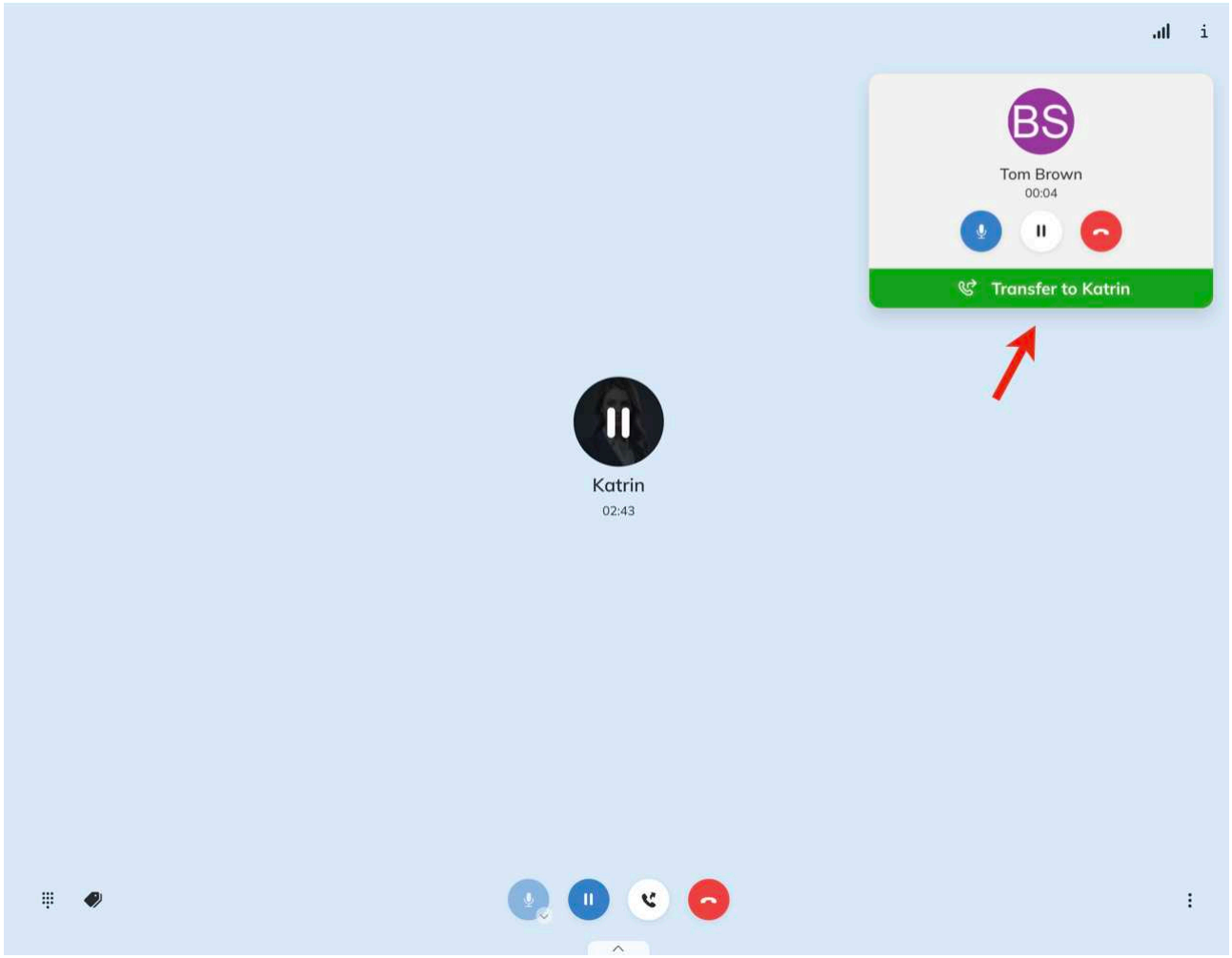
Select the option:

- Voicemail
- Attended Transfer
- Transfer (blind transfer)

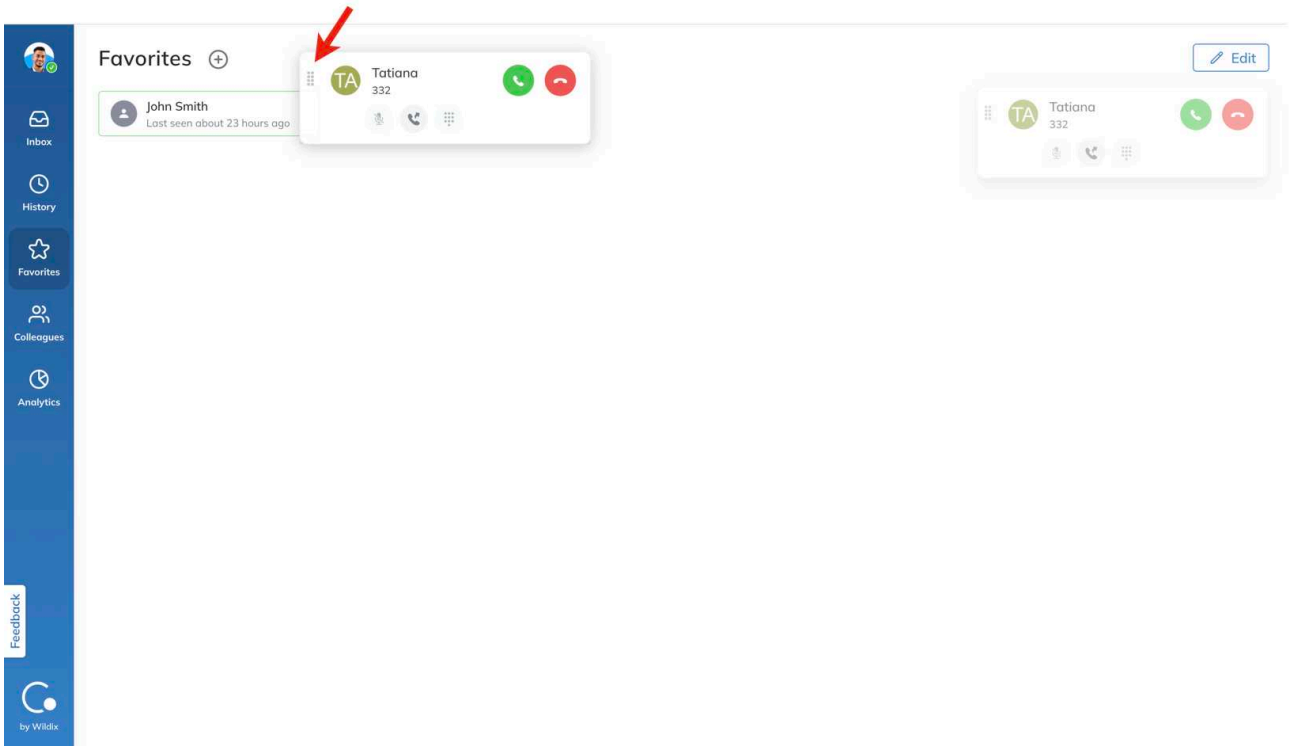


Note: When you click on the user from the search result, attended / semi-attended transfer is started by default.

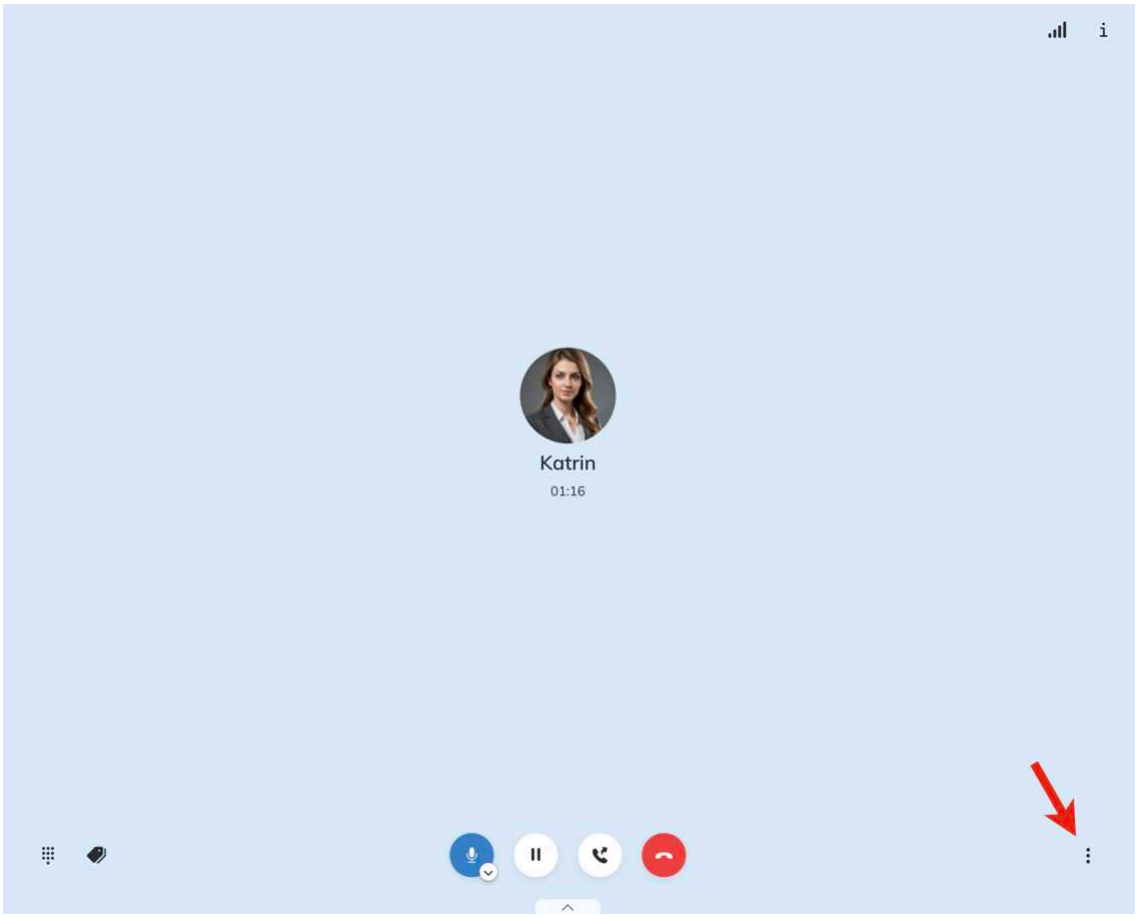
When you perform an attended / semi-attended transfer, a separate call dialog opens. To proceed with the transfer, click the green **Transfer to** button:



You can also transfer a call to a Call Group / Colleague via drag and drop on the Favorites tab:

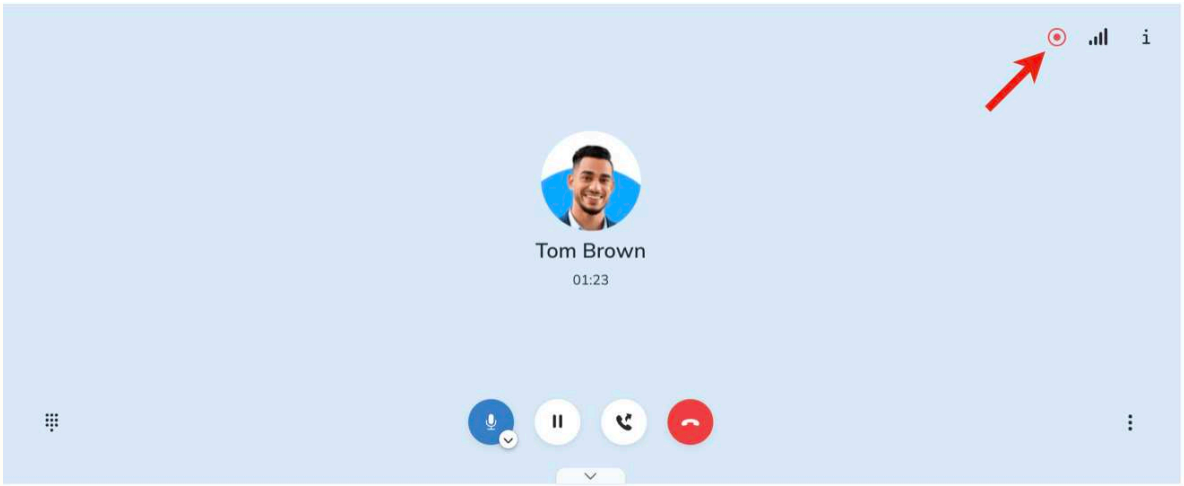


Clicking on the **More options** (three dots) button, you get the following options:

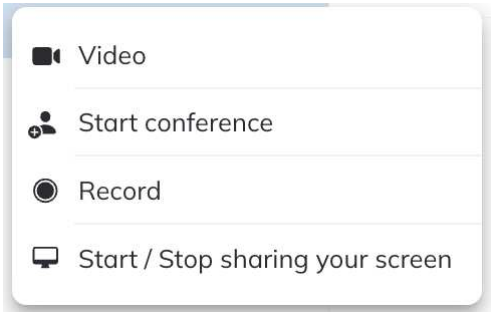


- **Video:** start/ stop video
- **Start conference**
- **Record**

Note: You can start/ stop recording for remote calls or pause recordings started via Dialplan, by pressing the Pause recording button in Call dialog.
When a call is being recorded, you can see the recording icon in the top right corner:



- **Start / Stop sharing your screen**



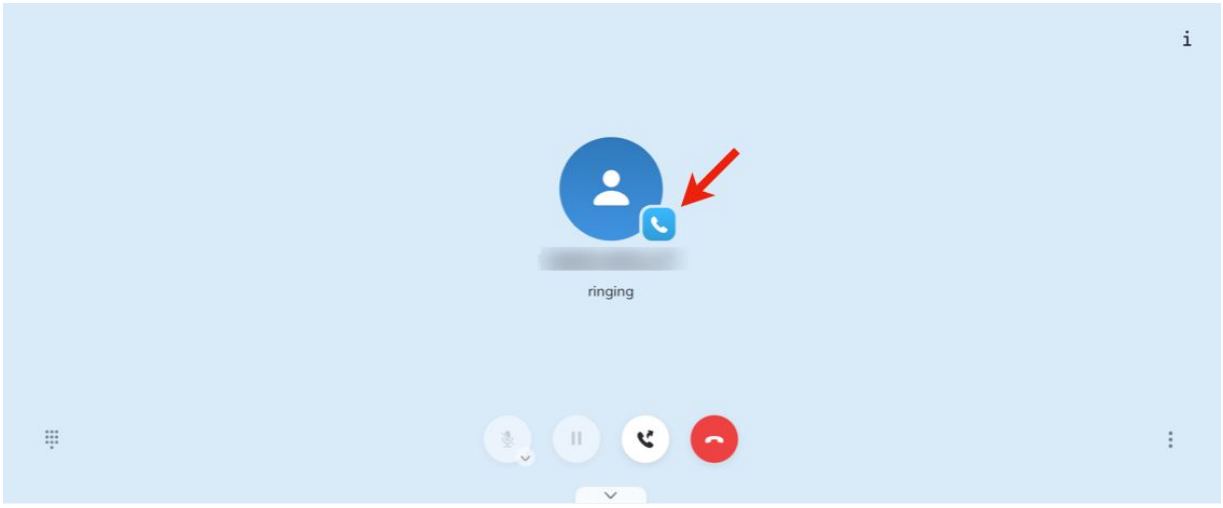
Note, when you add participants to the call, this option allows you to merge SIP calls into a conference call.

When you switch between different Collaboration 7 tabs, you can still see an active call dialog, which includes the following information: call duration, callee name, number, and avatar. Via the call dialog, you can mute, hold/ resume, transfer the call or hang up:



Calls with external users

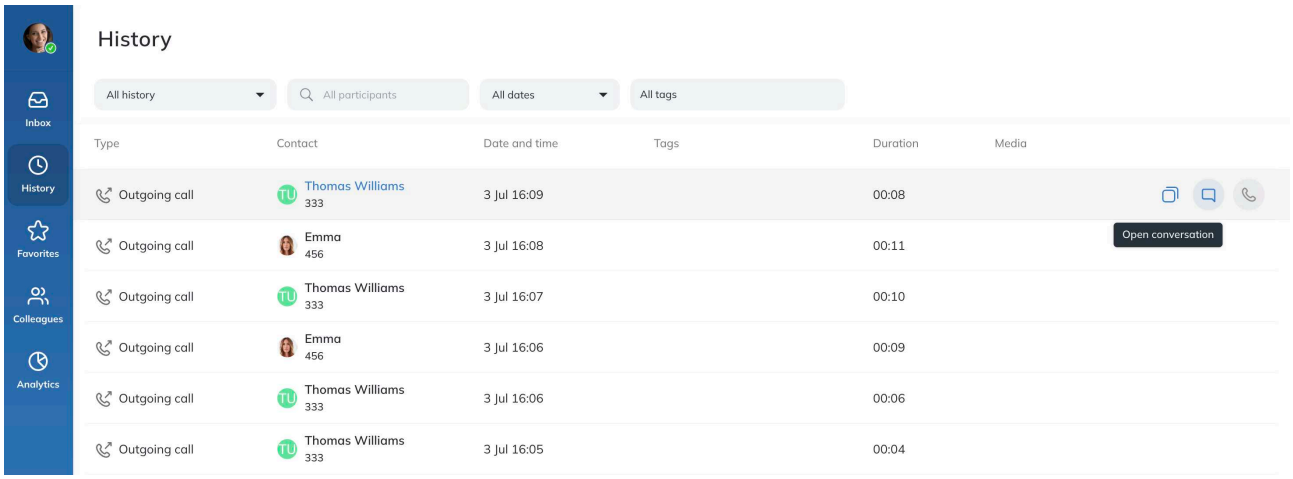
In case of a call with an external user, a call badge is added to the avatar which is displayed during the call:



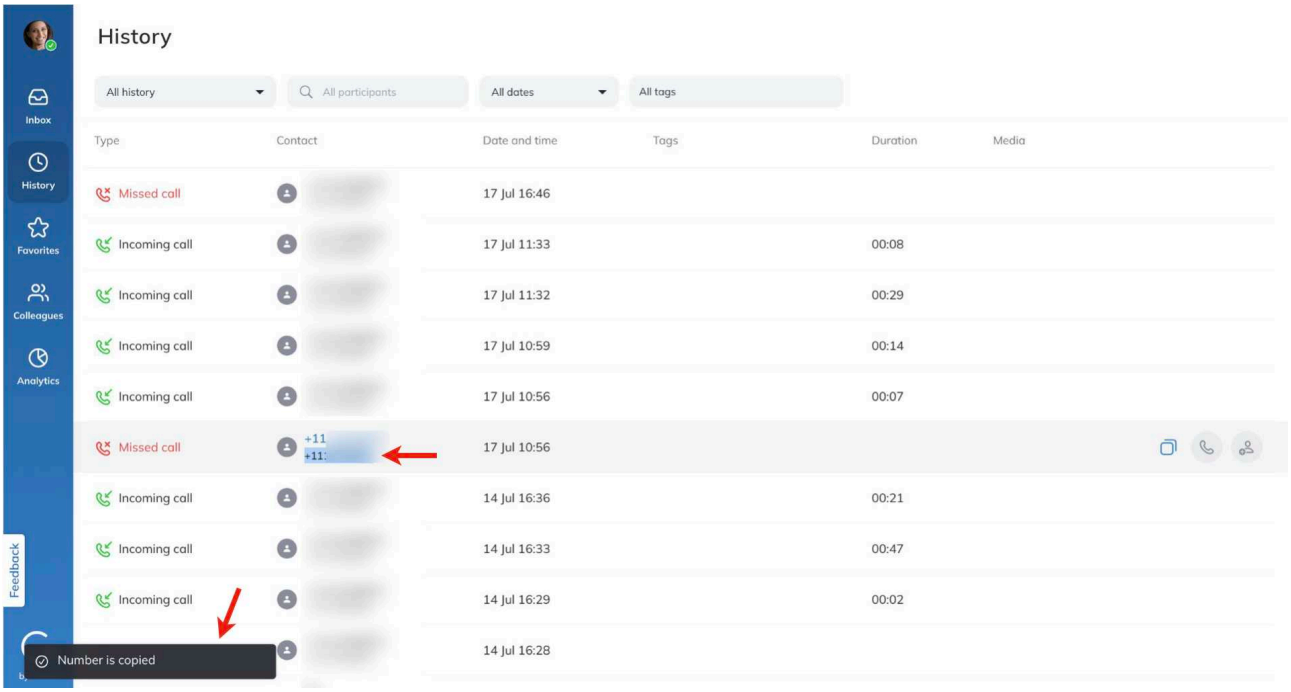
The call icon is added to the avatar in call dialog, on the Info frame and in conversations list.

History

Hovering a mouse over an entry, you can open a conversation or call back a contact. Clicking on the user, you are automatically directed to a conversation with this contact:

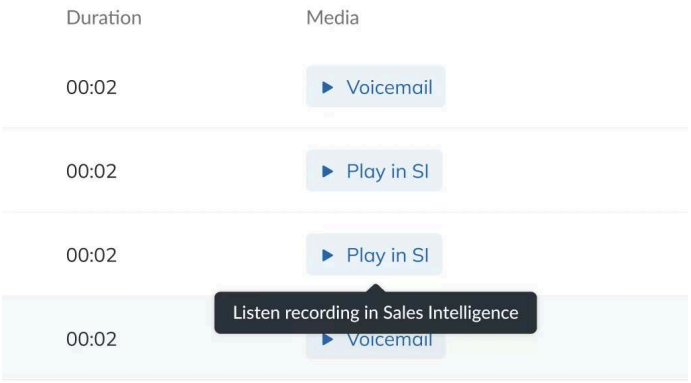


If you double-click on a number, the number is automatically copied to clipboard:



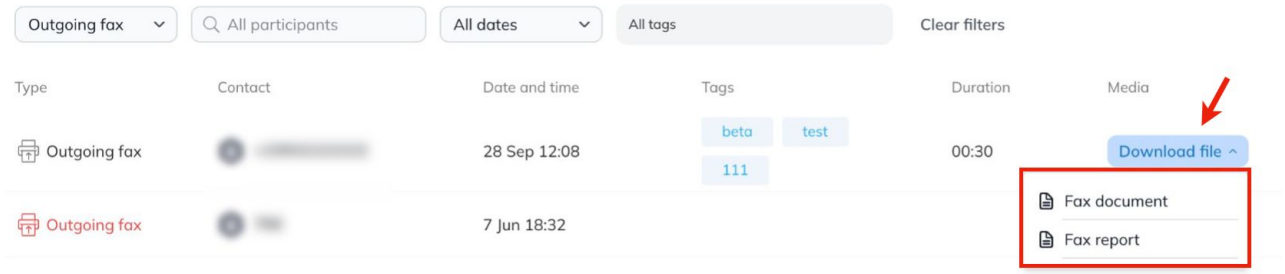
When you click on a phone number, a conversation opens and you can create contact via the Info frame.

In the Media column, you can view incoming and outgoing faxes, listen to call recordings in Sales Intelligence, listen to voicemails, and download both voicemails and call recordings:



For outgoing faxes, the **Download fax** button opens a dropdown menu offering two options:

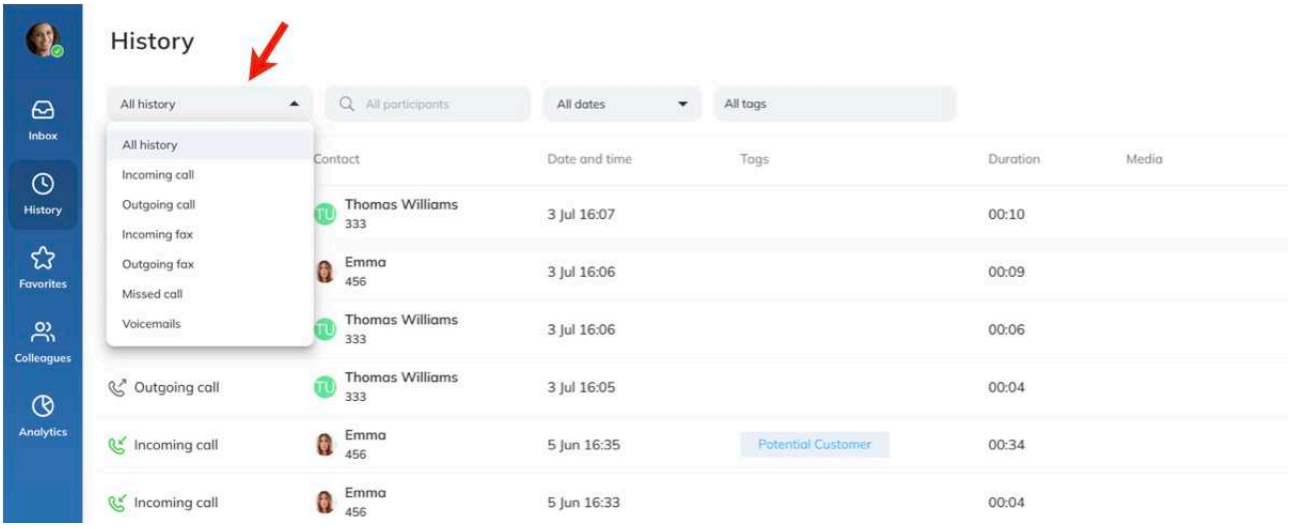
- *Fax document:* the original sent file.
- *Fax report:* the transmission result combined with the document.



Note:

- Voicemail recordings that were performed via “Transfer to > Voicemail” option are not displayed in Collaboration 7 (which will be fixed in future releases)
- The ACL rule “can/ cannot see Voicemail” isn’t applied in Collaboration 7.
- Call recordings and voicemails attachments are available starting from WMS 7.01.20250605.
- Outgoing fax are displayed starting from WMS 7.03.20250709.
- Missed calls ended by the caller during pre-answer IVR are displayed in History starting from WMS 7.03.20250711.2.

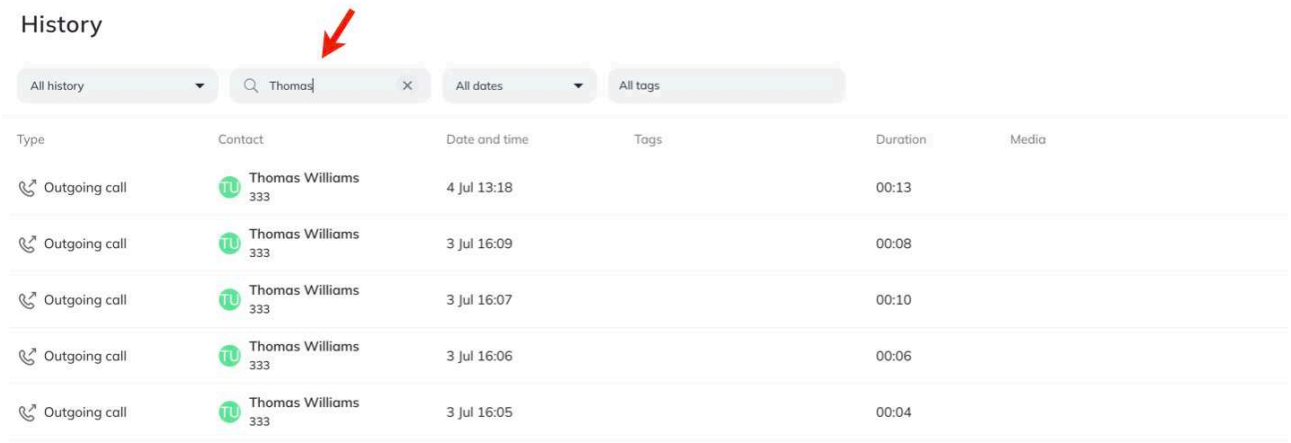
To filter History records click **All history** and choose the preferred filter:



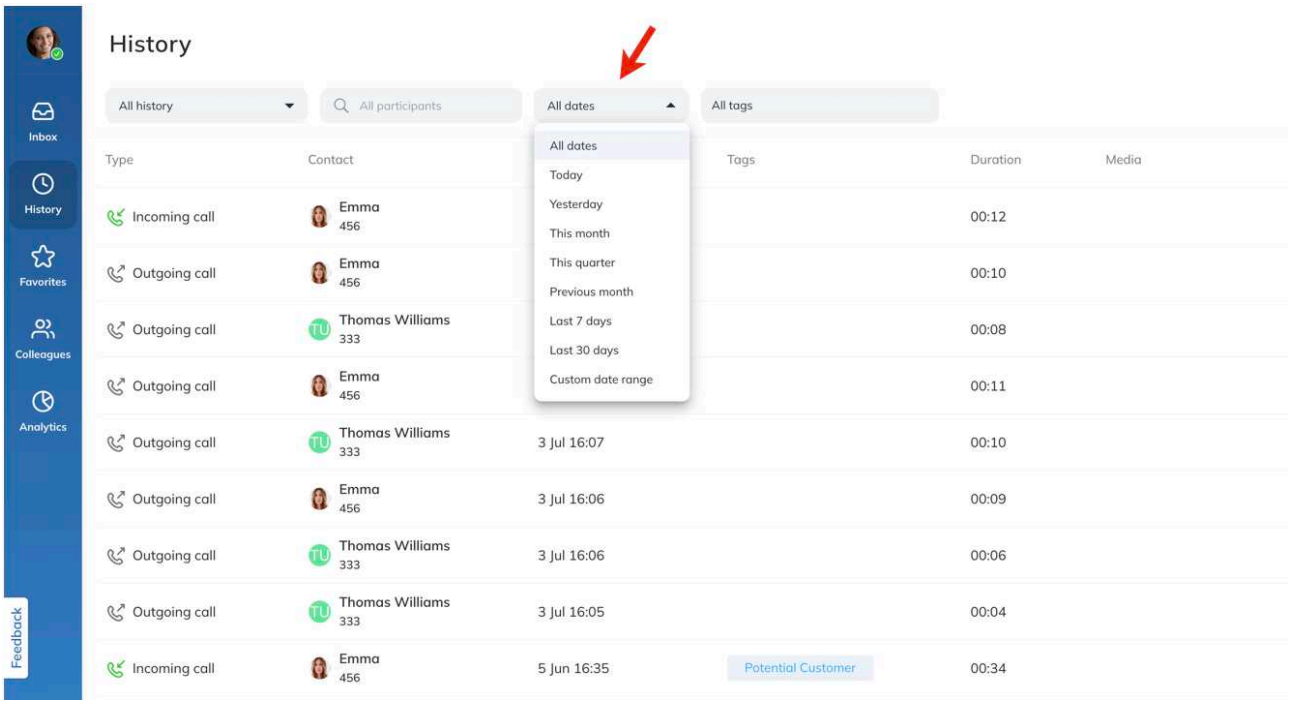
Current limitation: filter by recordings currently is not available (will be added in future releases).

Also, you can filter history by:

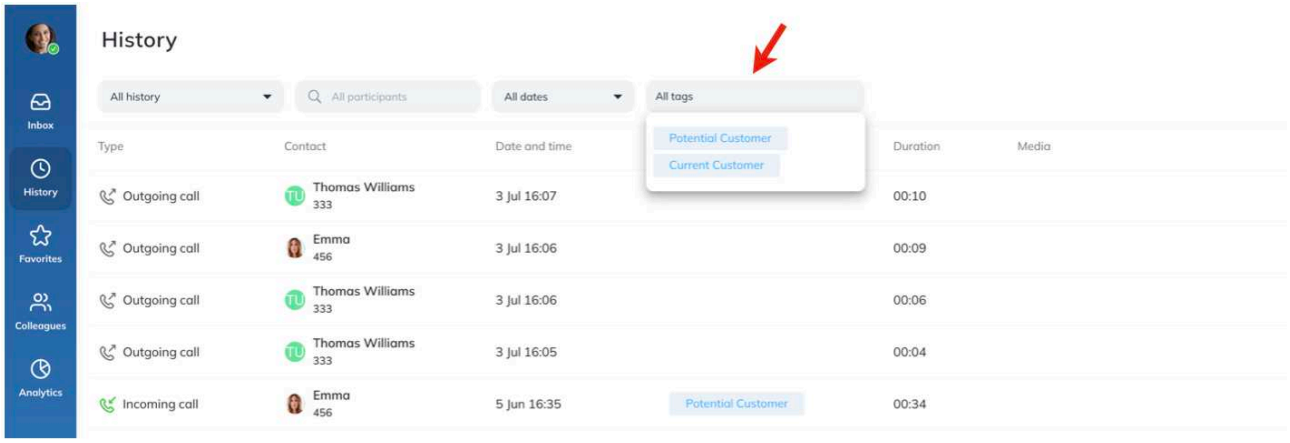
- participant number or name



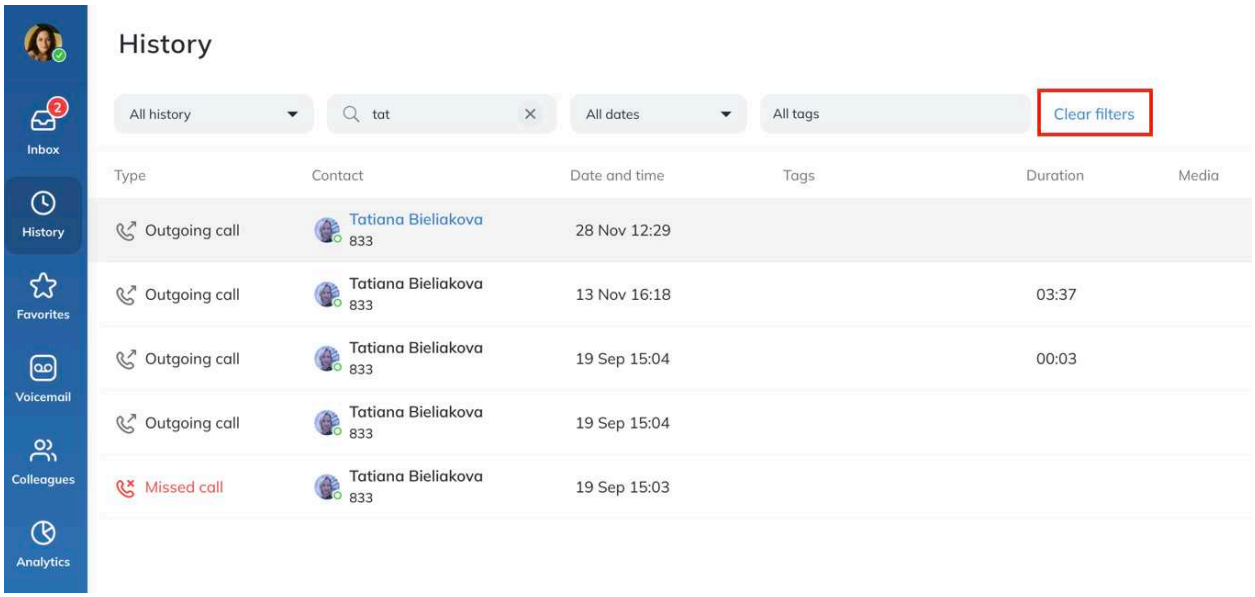
- date: e.g. today, yesterday, this month or select custom date range



- tags:



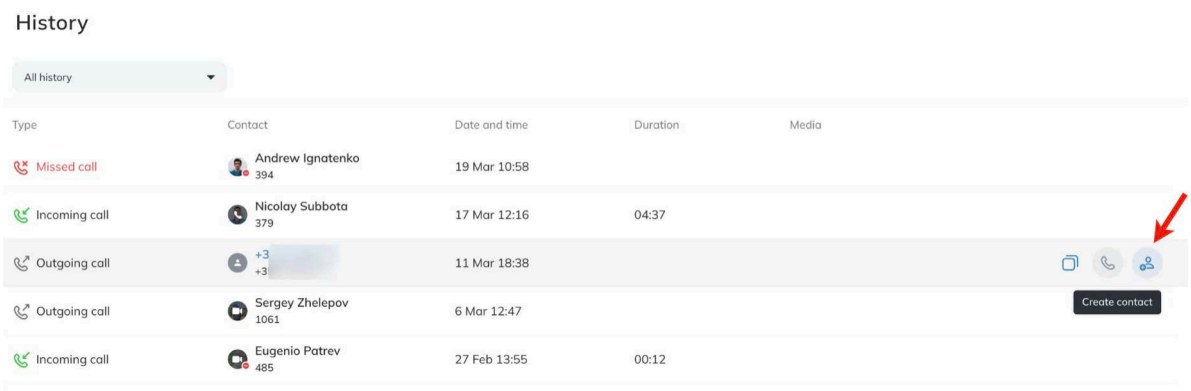
If you want to reset all previously applied filters, click the **Clear filters** button.



Note:

- When filtering by multiple tags, the "OR" operator is used. This means that the filtering returns calls that contain at least one of the selected tags, not necessarily all selected tags in a single call.
- Filtering is supported only for WMS tags (WMS -> PBX -> Call and Chat History -> Settings -> Tags)

In case history item is a phone number without a match found, you have an option to create a new contact. Check the detailed instructions in Collaboration 7 Web User Guide.



Favorites

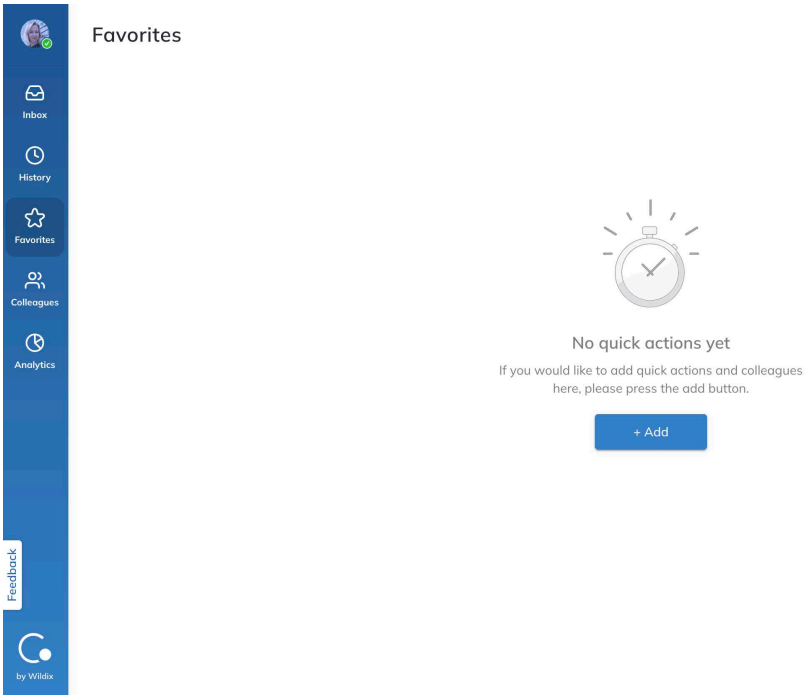
The Favorites tab allows you to add Function keys to monitor colleagues and features from WP4X0, WorkForce, WelcomeConsole, Vision (EOL), SuperVision (EOL), iOS/Android apps.

To add function key:

- Proceed to the *Favorites* tab and click **+**



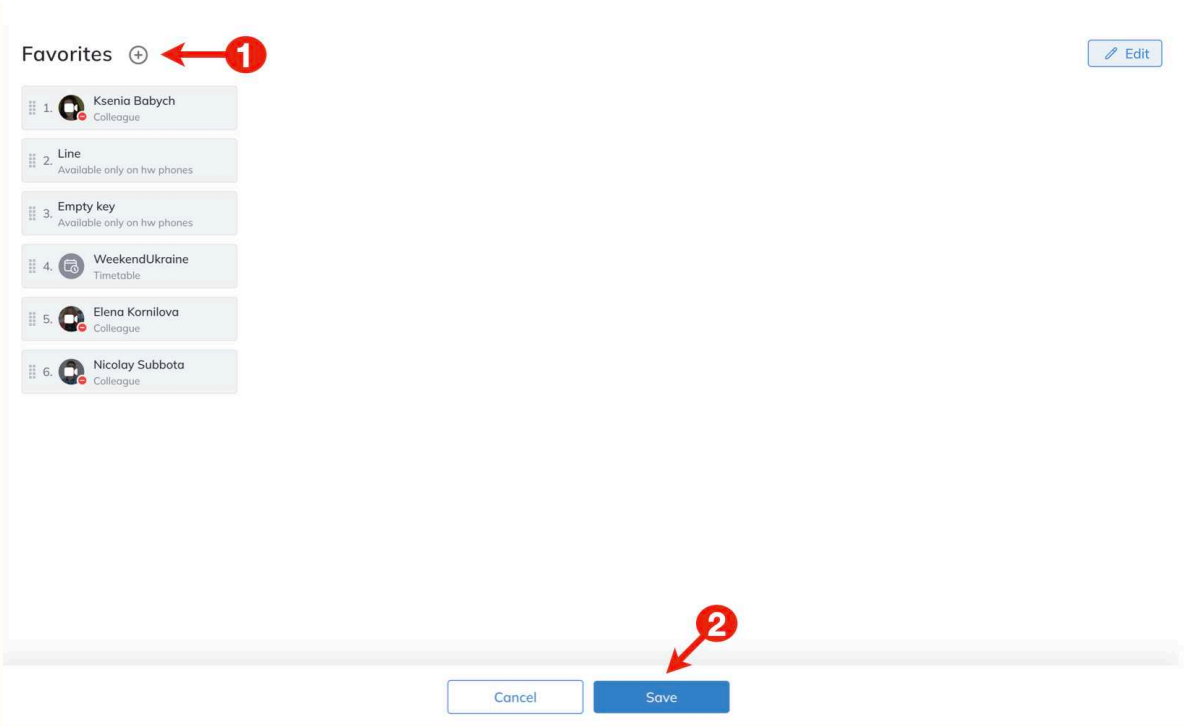
In case you have no function keys added yet (or only function keys that are available on hardware phones), you need to click the **+Add** button in the middle of the screen:



Note: If you need to add multiple Function keys, we recommend using the *Edit* mode, as via this mode the keys are added quicker:

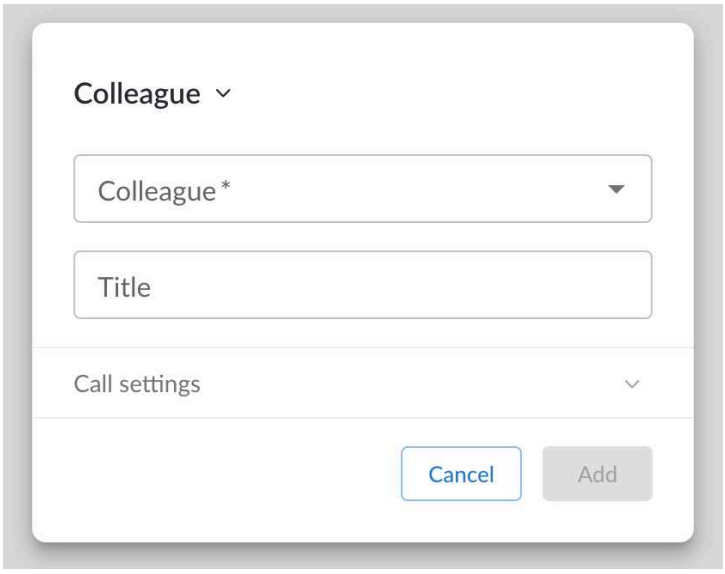


Add necessary Function keys via the **+** button (1) and make sure to click **Save** (2) to save the changes:



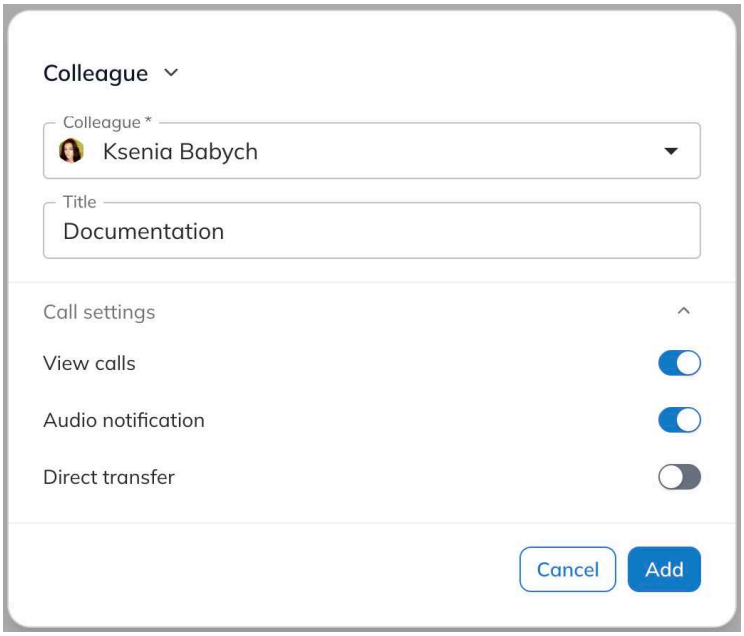
Current limitation: You need to add at least one function key that works in Collaboration 7 to be able to add favorites in the *Edit* mode. In case you enter the Edit mode with function keys that are available on hardware phones only, there is no button to add a new function key.

- A screen pops up, where you can choose type of the function key (in the example below, it is *Colleague*)



- To set up, select Colleague, enter title and select call settings (View calls / Audio notifications / Direct transfer) and click **Add**:

Note: Direct transfer functionality is currently supported on hardware phones only.



Viewing calls and getting audio notifications is available for Colleague / Park Orbit / Call group function keys. To see who your Colleague is talking to, hover the mouse over the Colleague avatar during an active call and see the pop-up with the relevant information:



Note: Currently, on mobile user can see that colleague is on call or has incoming call, but cannot see with whom or who is calling.

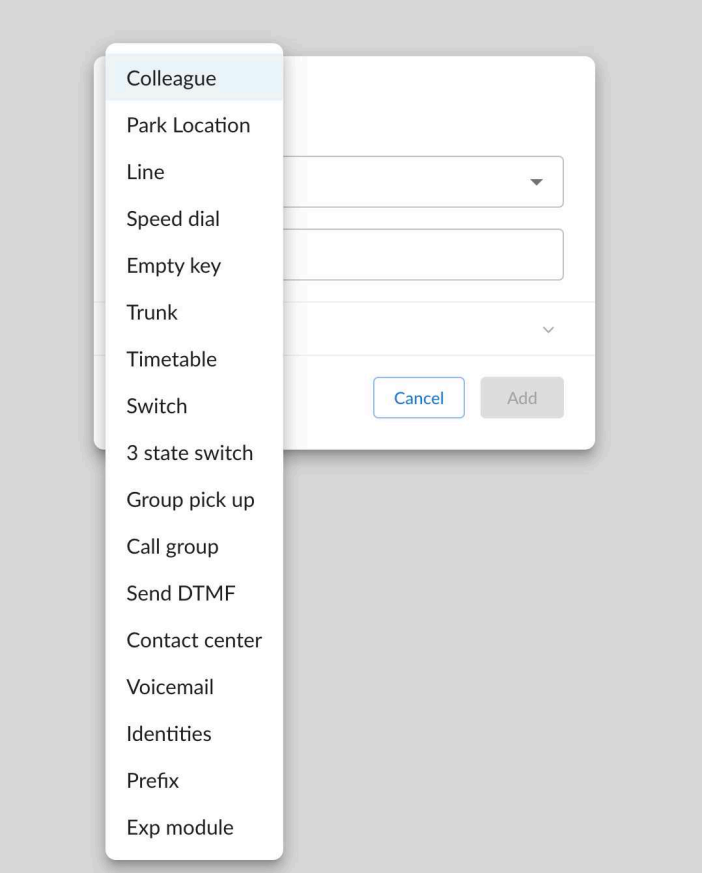
Double-clicking on a Colleague function key, you'll be directed to the conversation with the colleague.

When you have an active call, you can drag & drop it to the necessary Colleague to forward the call to them.

Note: By default, drag-and-drop performs an attended transfer.

Function keys list:

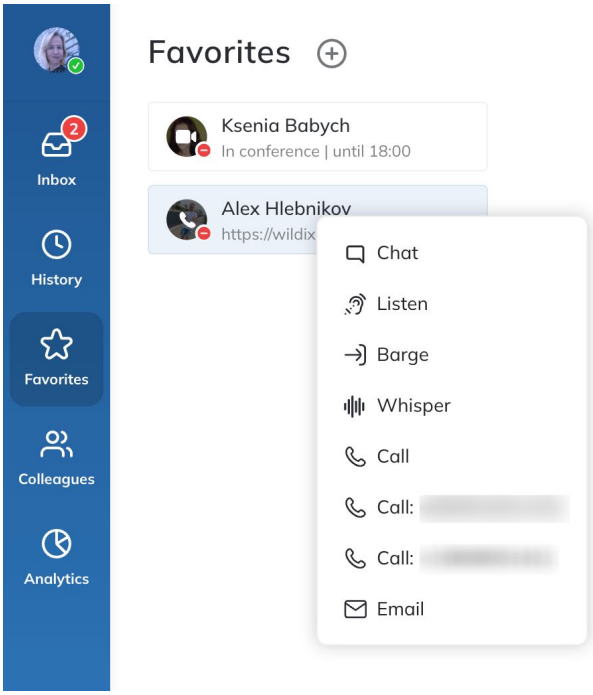
- Clicking on *Colleague*, you can see a drop-down list of available function keys options:



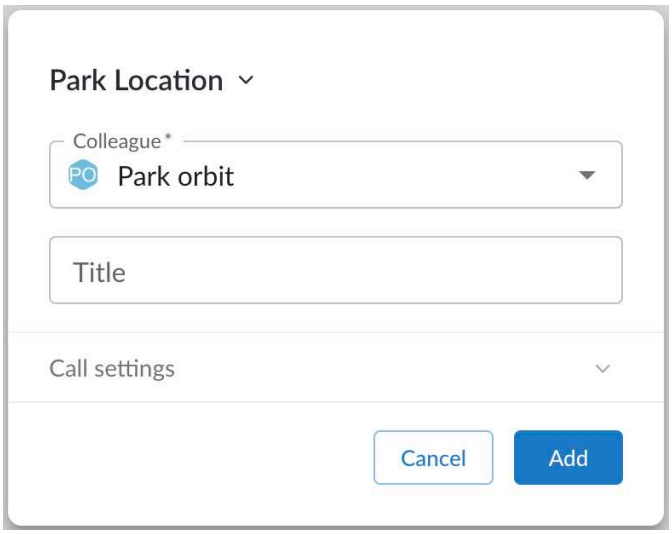
- Colleague:
  - Monitor user status
  - Click to call user
  - Click to pick up a ringing call

When Colleague is having an active call, you can also see the following options:

- *Listen:* implies silent intrusion
- *Barge:* call intrusion
- *Whisper:* partial intrusion



- Park Location
  - Drag & drop an incoming call
  - Transfer an active call
  - Click pickup icon to resume



- Line
  - Monitor the actual status of the line
  - Click to use the line
  - Click to answer a call or to resume a call from hold
  - Click to make a call with user's identity extension. Supported on WP4X0, WorkForce, WelcomeConsole. Consult Identities Feature for detailed information

Note: The function key is available only on hardware phones.

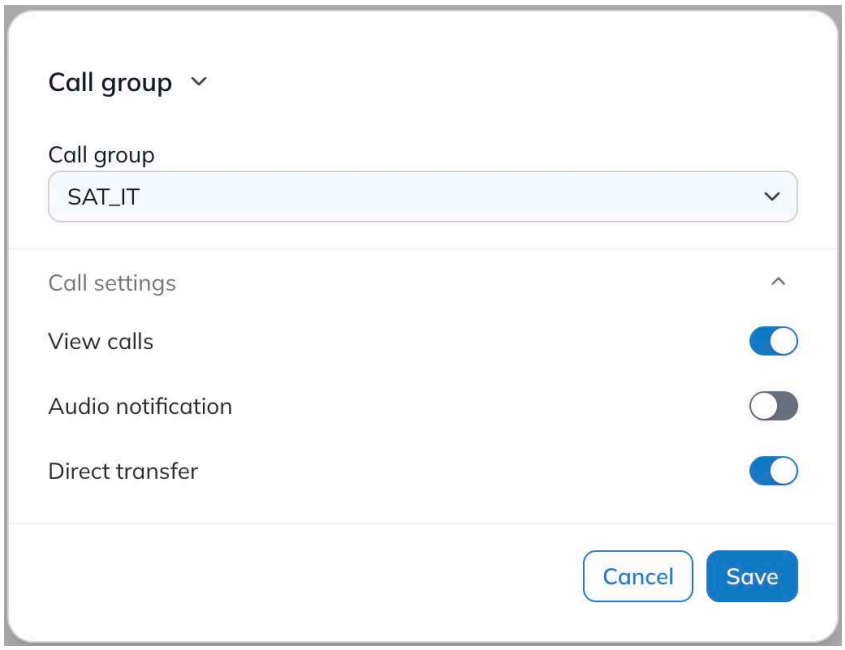
- Speed dial
  - Click to make a call
  - You can also transfer a call to a Speed dial Function key via drag and drop
  - You can search for colleagues, phonebook contacts, and contacts from other integrations to select the desired phone number or extension
- Empty key

Note: The function key is available only on hardware phones.

- Trunk
  - Monitor the status of channels on a GSM/ BRI/ PRI/ FXO trunk (in case there are no available channels, the key is on)
  - Click to use the trunk

Note: The function key is available only on hardware phones.

- Timetable / Switch / 3 state switch
  - Monitor the status of a timetable / switch
  - Click to change the status
- Group pick up
  - Use the key to pick up a ringing call of a user from your ACL group (works for users registered to the same PBX)
- Call group
  - Monitor incoming calls to the call group
  - Click to dial the call group or to pick up a ringing call of a call group



- Send DTMF

    - Click to send DTMF during an active call
- Contact center
    - Click to log into Call groups as a dynamic user on hardware phone

> Note: The function key is available only on hardware phones. Supported on WP4X0, WorkForce, WelcomeConsole.

- Voicemail
    - Click to access shared voicemail of another user or subscribe for a Call Group notifications manager to view missed calls and voicemails. Check out Shared voicemail feature and How to set up the Call Group notifications manager feature guides for detailed information

> Note: The function key is available only on hardware phones.

- Identities
    - Click to change the identity of numbers for outgoing calls

> Note: The function key is available only on hardware phones. Supported on WP4X0, WorkForce, WelcomeConsole.

- Prefix
    - Configure a certain predefined value that will be added to a dialled phone number or another BLF on WorkForce and WelcomeConsole

> Note: The function key is available only on hardware phones. Supported on WP4X0, WorkForce, WelcomeConsole.

- Exp module
    - Monitor function keys from the Expansion module

> Note: The function key is available only on hardware phones.

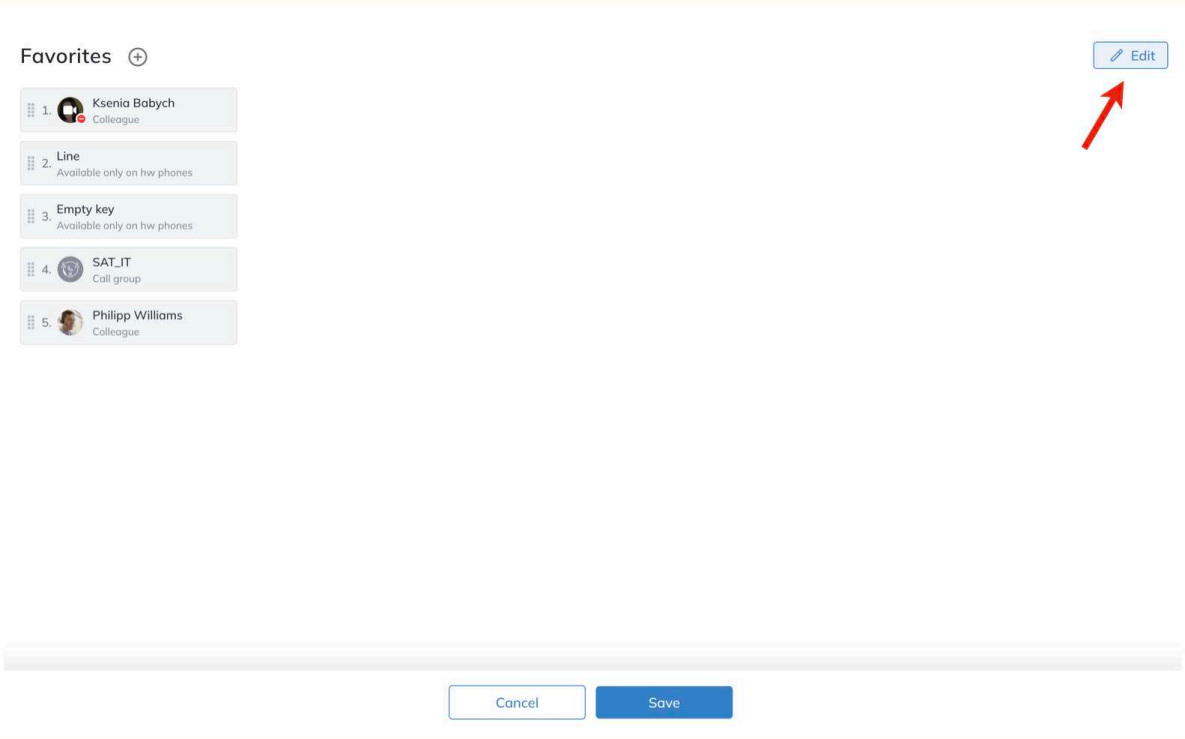
Manage function keys:

The function keys you have added are displayed on the Favorites tab:



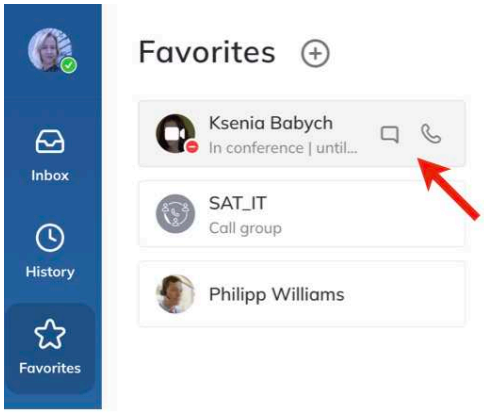
> Note:

- The function keys that are available only on hardware phones, are displayed only in the Edit mode:



- Currently, ACL rules are not applied. User may add a function key, not allowed by his ACL, but the function key won't work for the user.

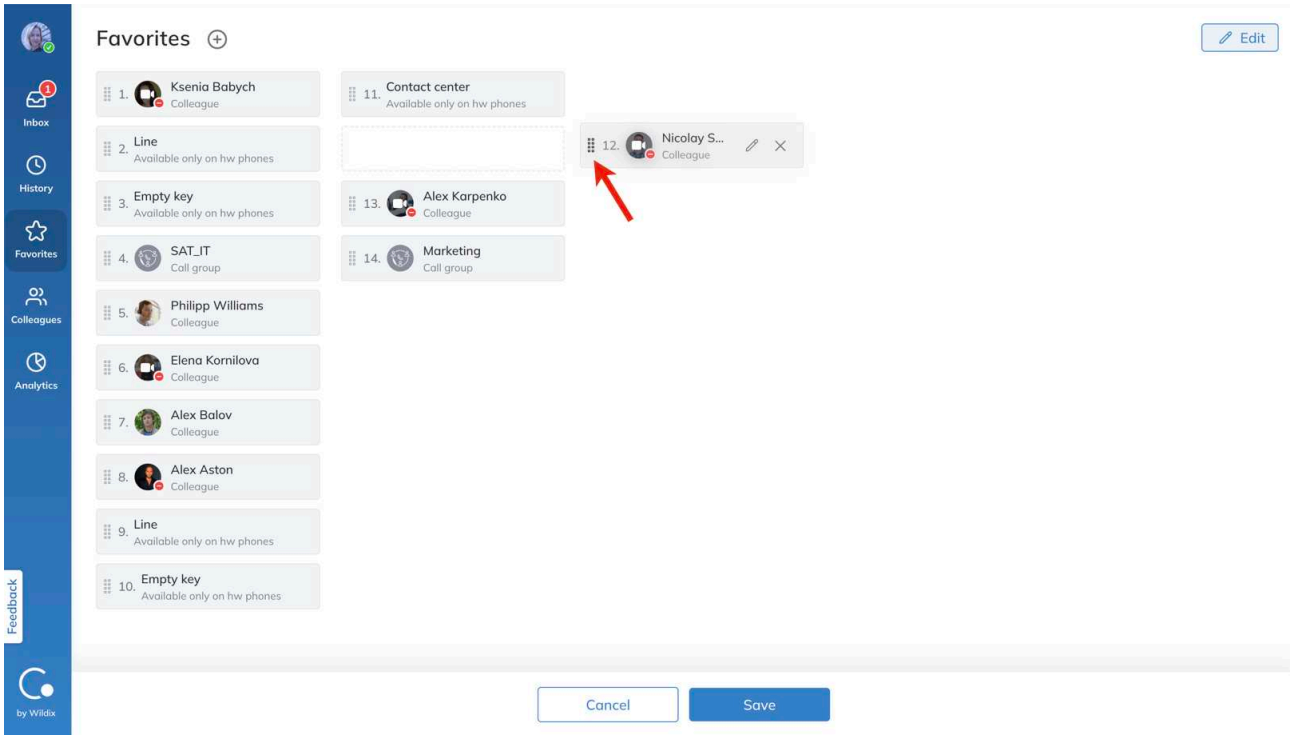
By hovering the mouse on the function key, you can see the actions that can be performed (e.g. Chat or Call for Colleague function key):



You can also right-click on a function key to see the list of available actions:



To change the order of Function keys, click on the left side of the Function key and drag&drop it to the desired position:

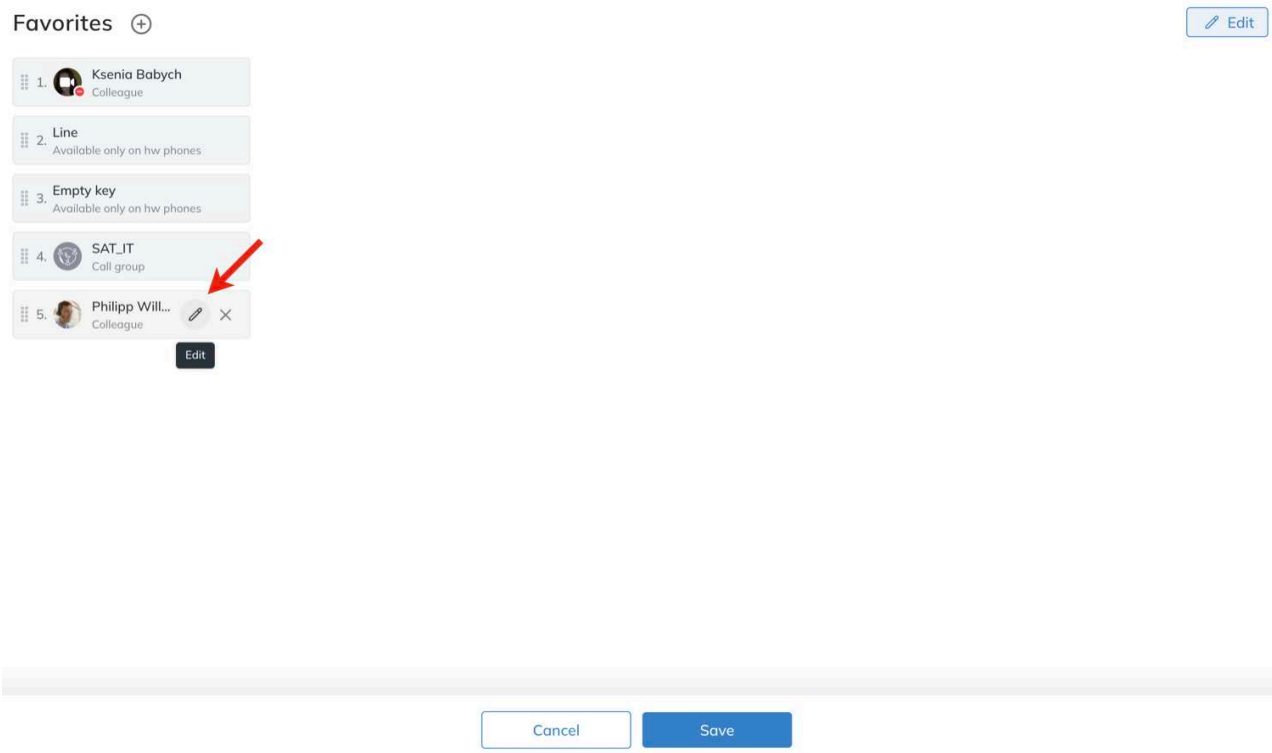


To edit a function key:

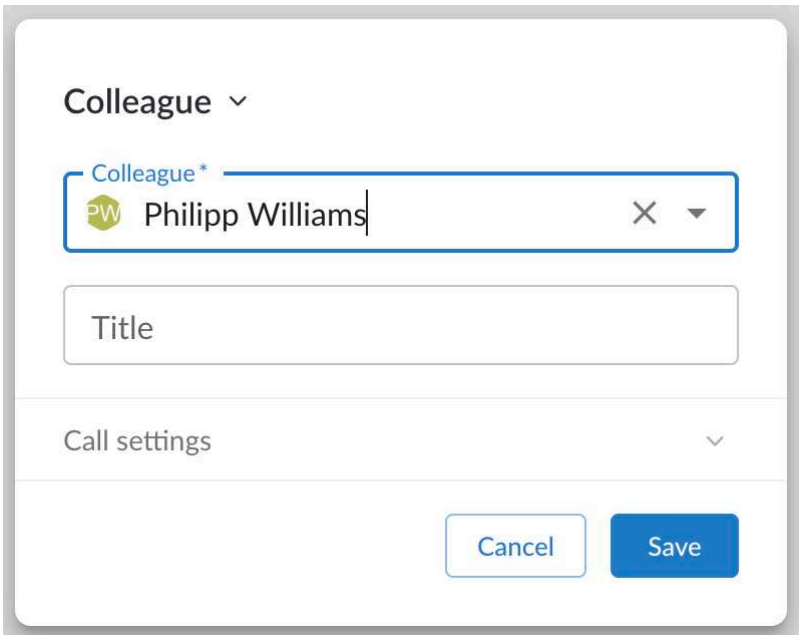
1. Click **Edit** in the top right corner:



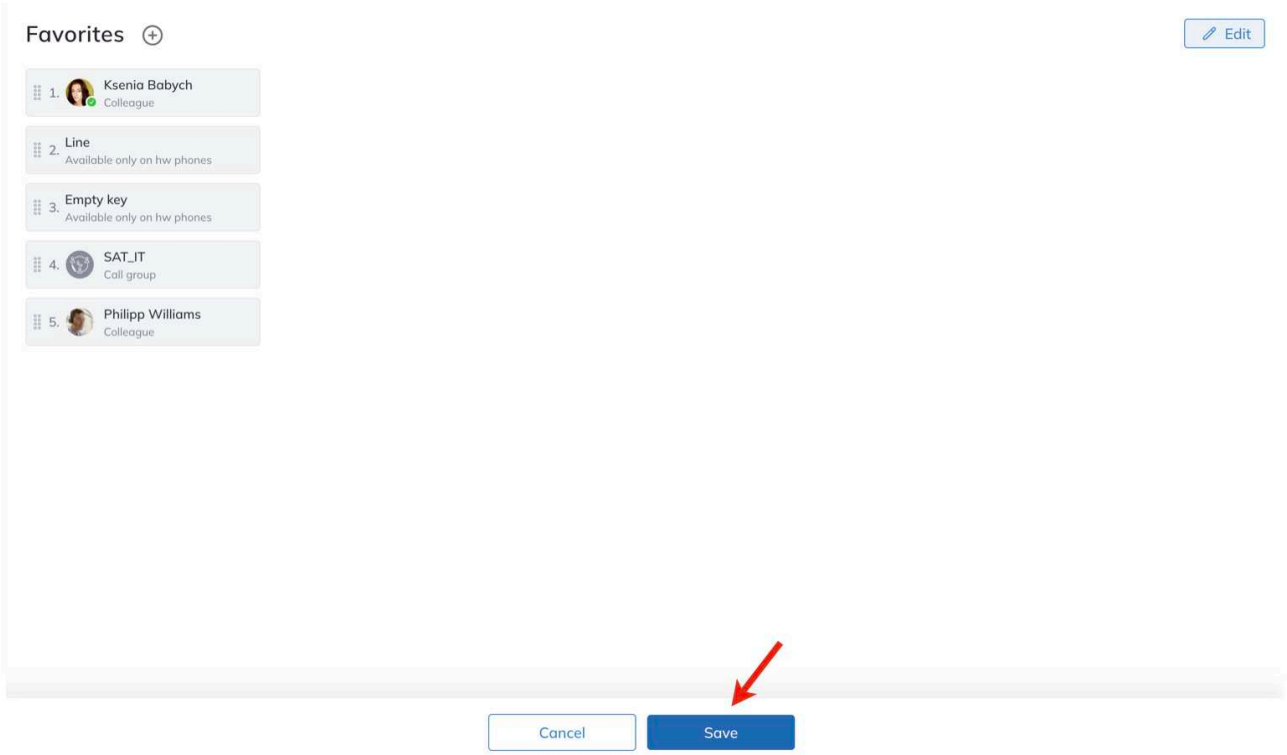
2. In the Edit mode, hover the mouse over the function key you want to edit and click the pencil icon:



3. Edit the function key and click **Save**:



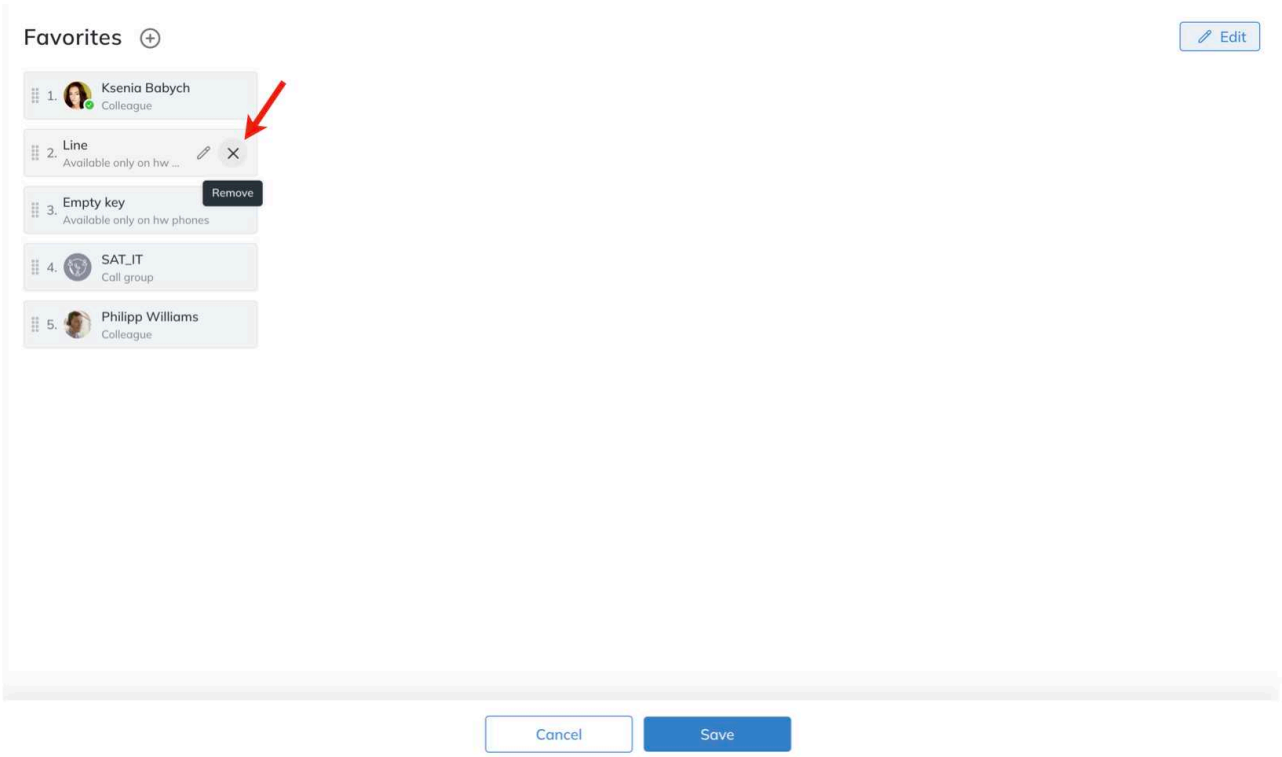
4. Click **Save** at the bottom of the page to exit the Edit mode and apply changes:



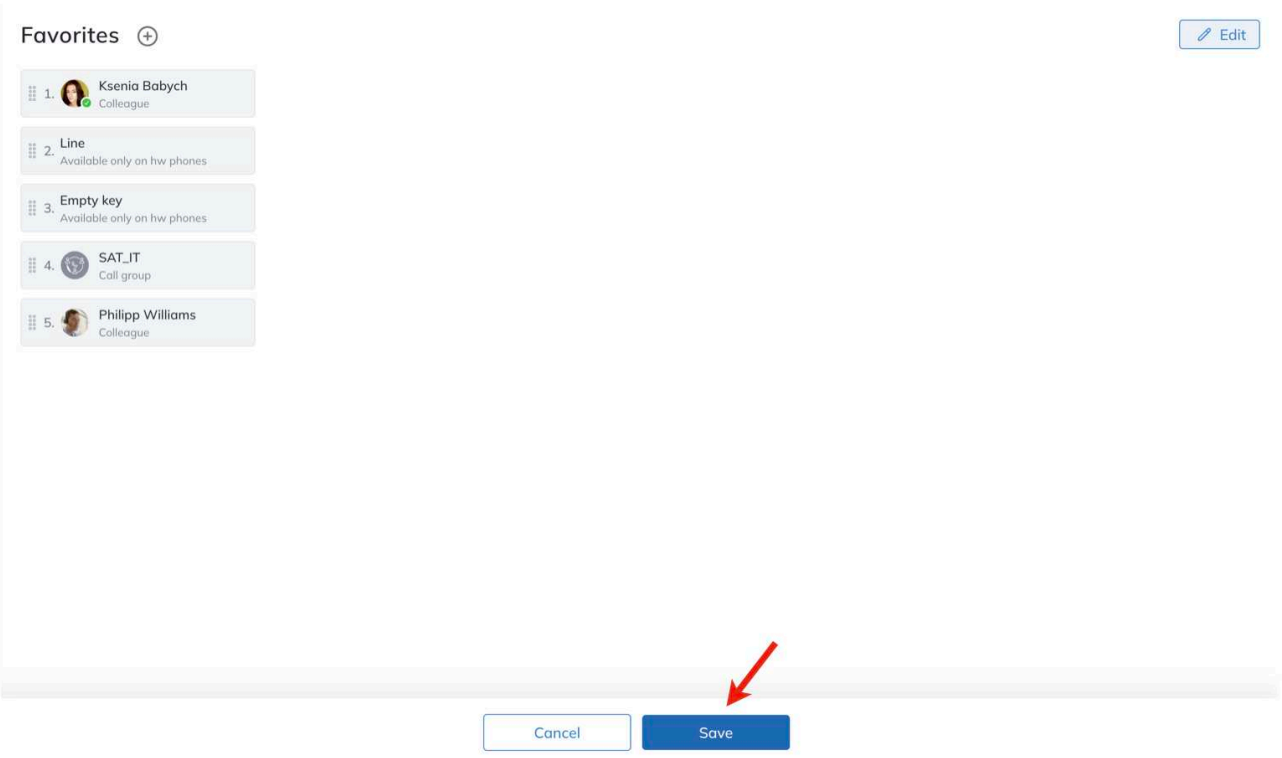
Important: If you click Cancel, the changes are not applied.

To remove a function key:

1. In the Edit mode, hover the mouse over the necessary function key and click **X (Remove)**:



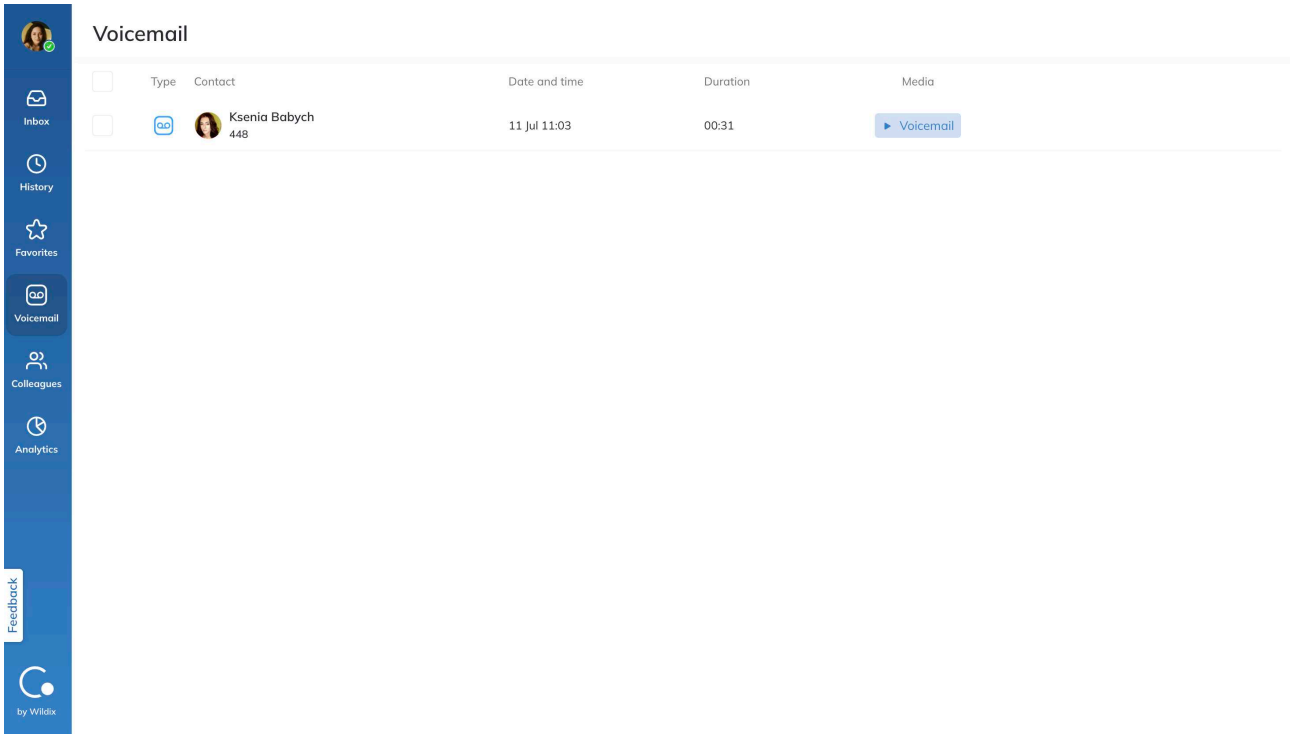
2. Click **Save** at the bottom of the page to exit the Edit mode and apply changes:



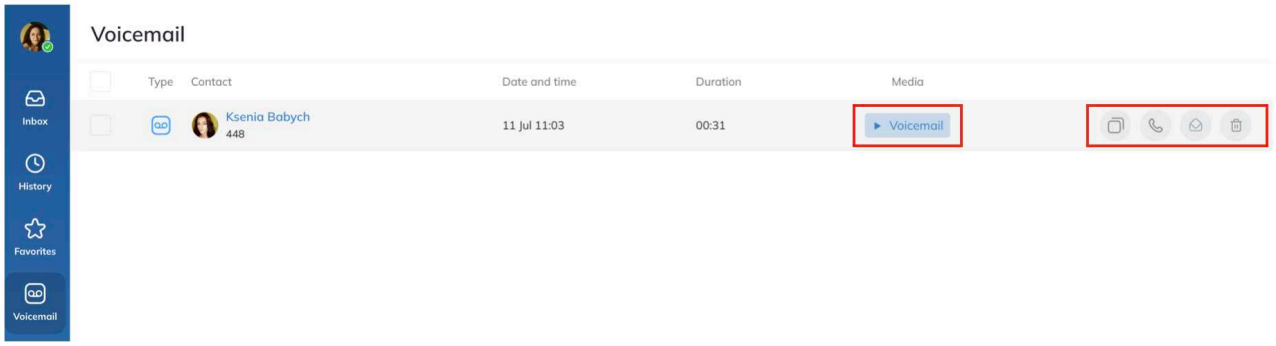
Voicemail

The Voicemail tab shows your personal and shared voicemails. You can listen to messages, mark them as read or unread, copy the number, delete or download any available recordings.

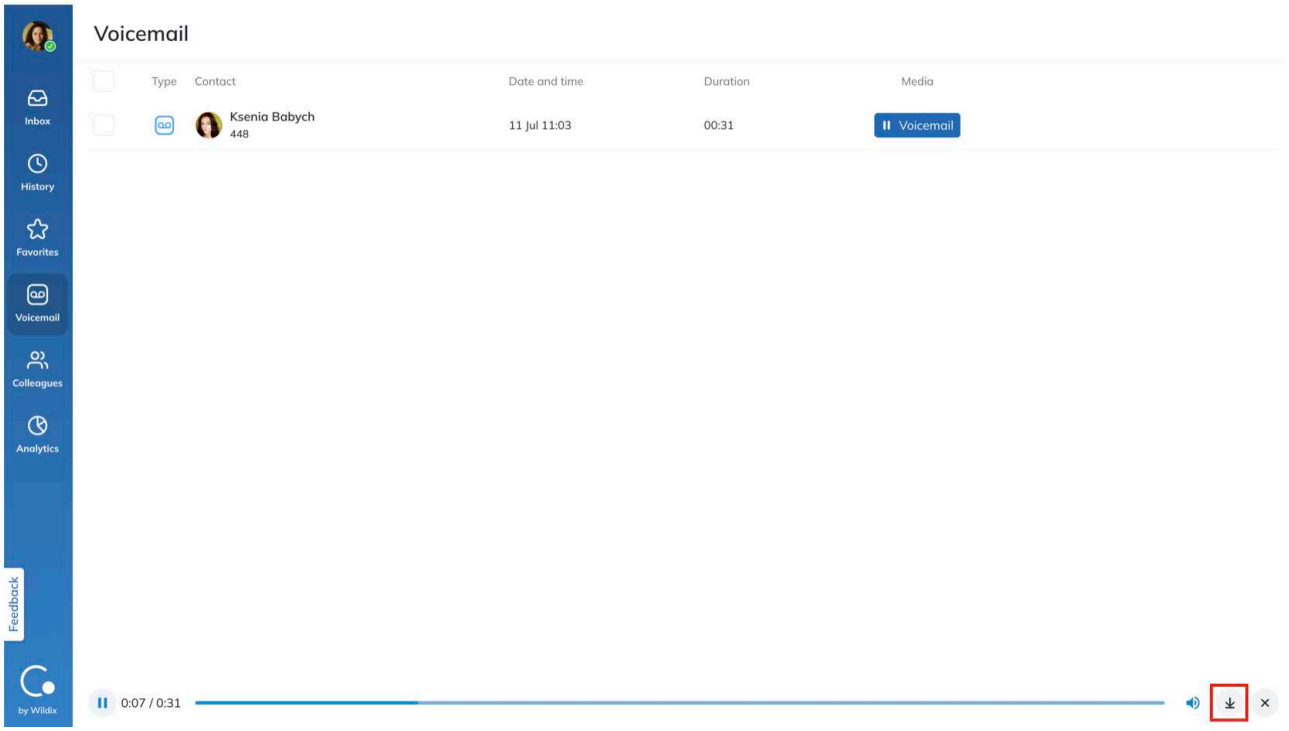
> ⚠ Note: For each Call Group, the Call Group Manager receives missed call notifications in the Voicemail tab.



To see additional options, hover your mouse over a voicemail. You will see the buttons *Copy number*, *Call*, *Mark as read/unread*, and *Delete*. To listen to the message, click the blue **Voicemail** button.



After you click the Voicemail button, an additional *Download* button will appear, allowing you to save the message.

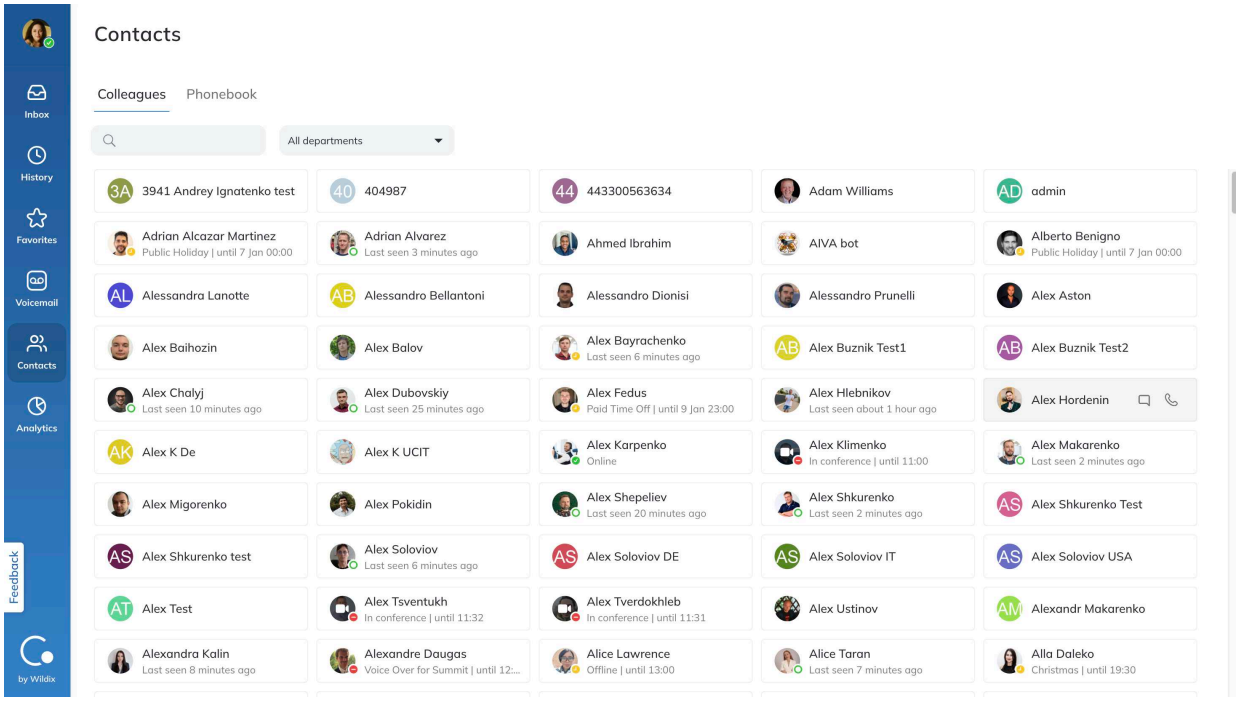


Contacts

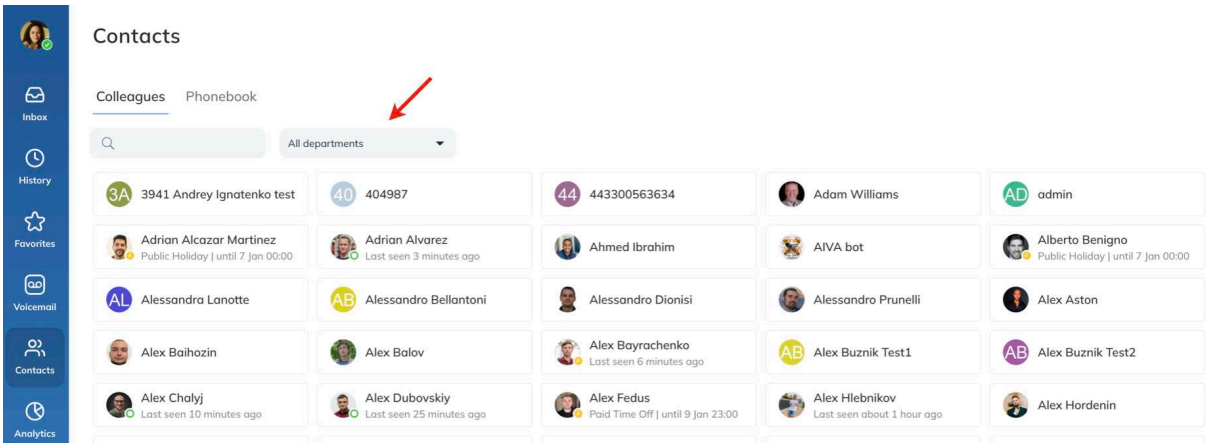
The Contacts tab displays all users in one place, split by departments, listed in alphabetical order, letting you easily find the necessary colleague, monitor status and presence, start a call, chat, send email, forward, or pickup a call.

Note:

- Currently, ACL rules are not applied.
- Colleagues that do not belong to any department are displayed in the All departments section.
- Current user is also displayed in the list of the user's Colleagues, both in All departments and in the relevant department user is assigned to.

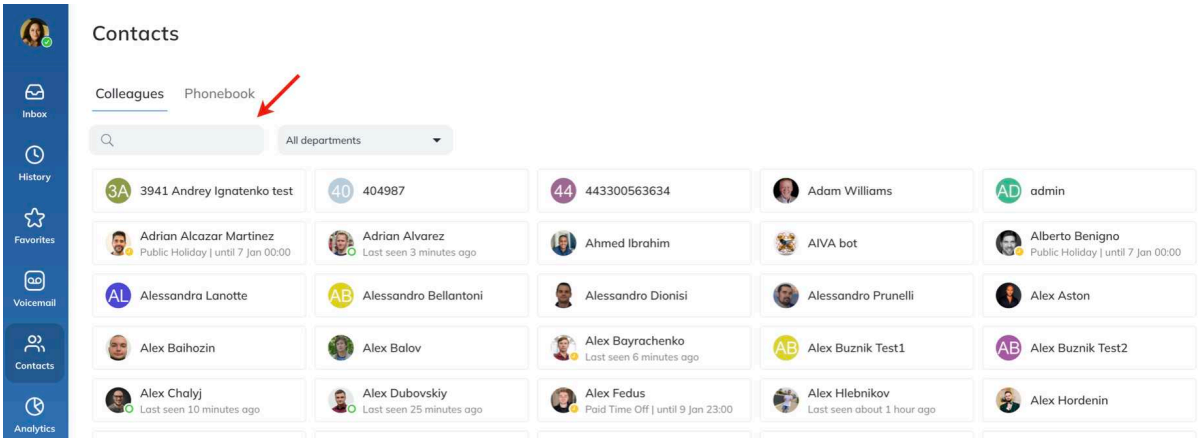


You can see colleagues from All departments or choose the department you are interested in. To select another department, click **All departments** and select the necessary department:

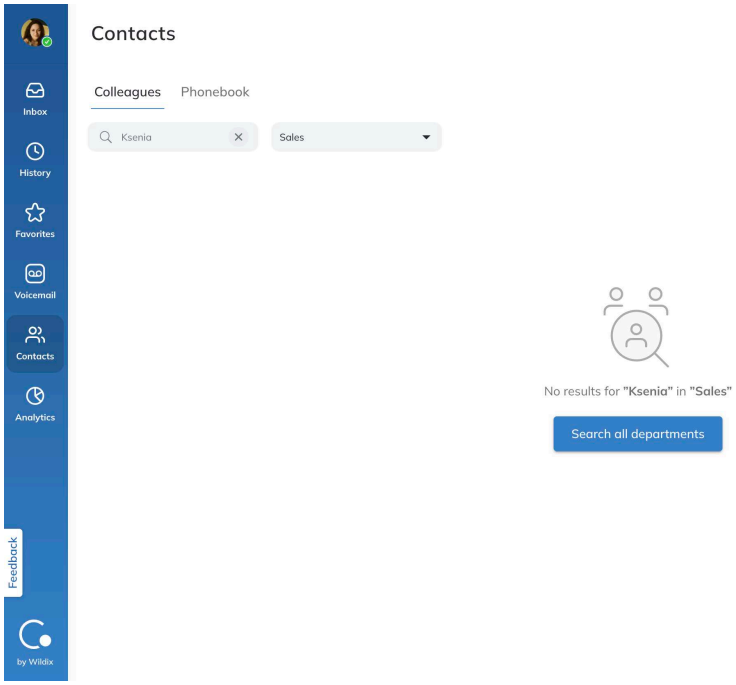


Note: The selected department is not saved when you switch to another Collaboration 7 tab.

To find a colleague, use the *Search* field:

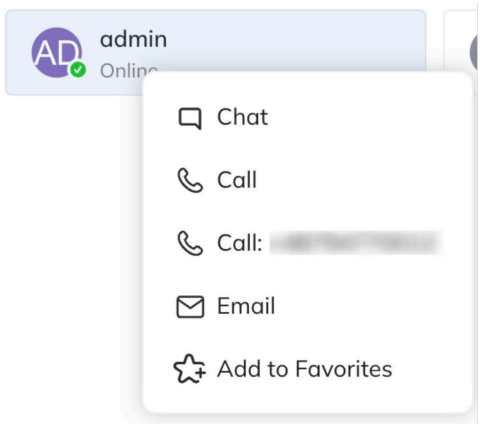


If you are performing a search in a particular department and the Colleague cannot be found there, you are suggested to search in all departments:



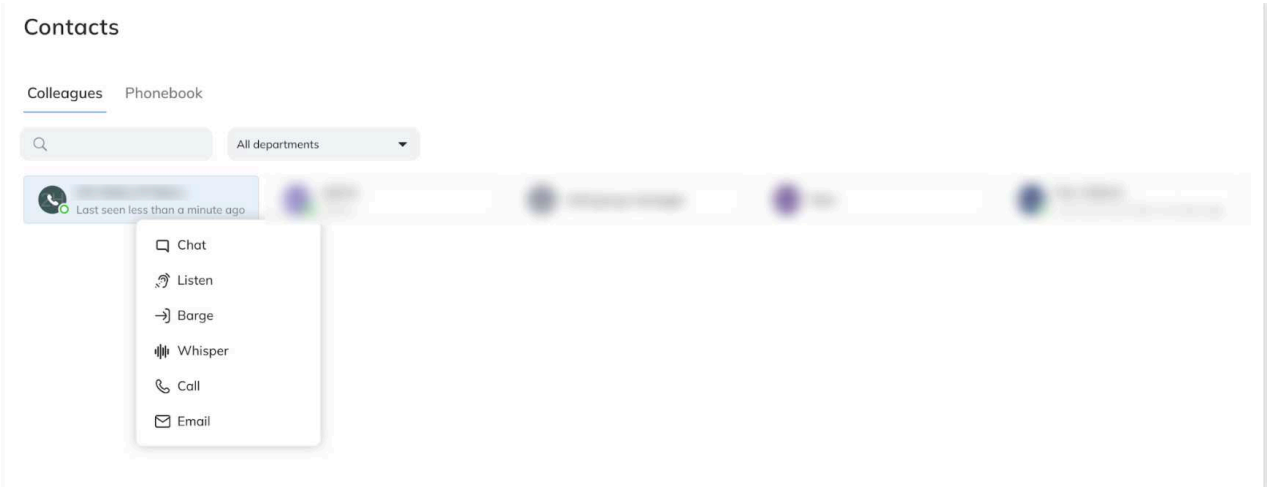
Hovering the mouse over a colleague, you can see *Chat* and *Call* icons that allow to open conversation or start a call correspondingly.

When you right-click on a *Colleague*, you can see *Chat* and *Call* options, send an *Email,* add them to *Favorites*, and view their office number:



When a Colleague is having a call, you can also see the following options:

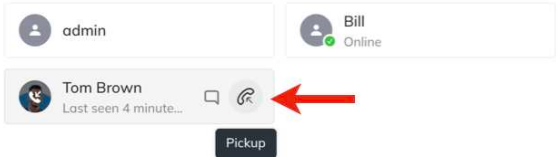
- *Listen:* implies silent intrusion
- *Barge:* call intrusion
- *Whisper:* partial intrusion



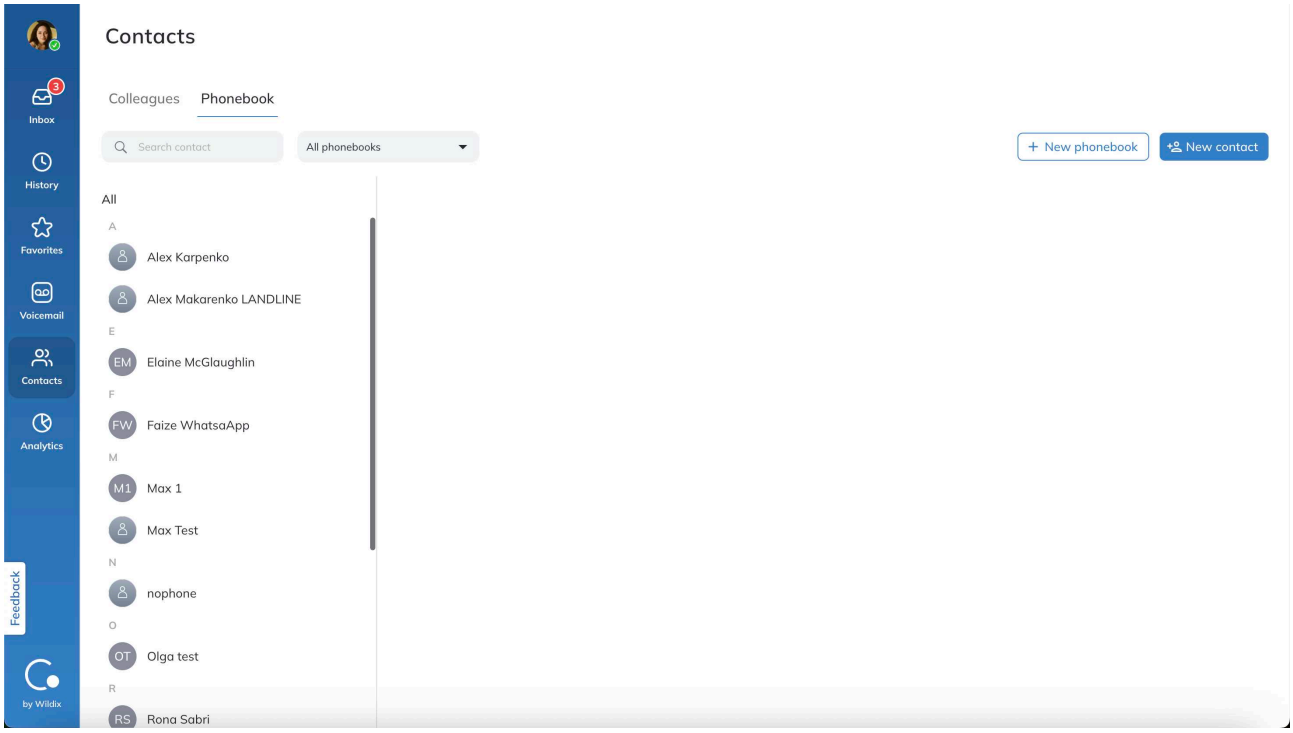
When you're having an incoming call, you can drag and drop it to the necessary colleague to forward the call to the colleague.

Note: By default, drag-and-drop performs an attended transfer.

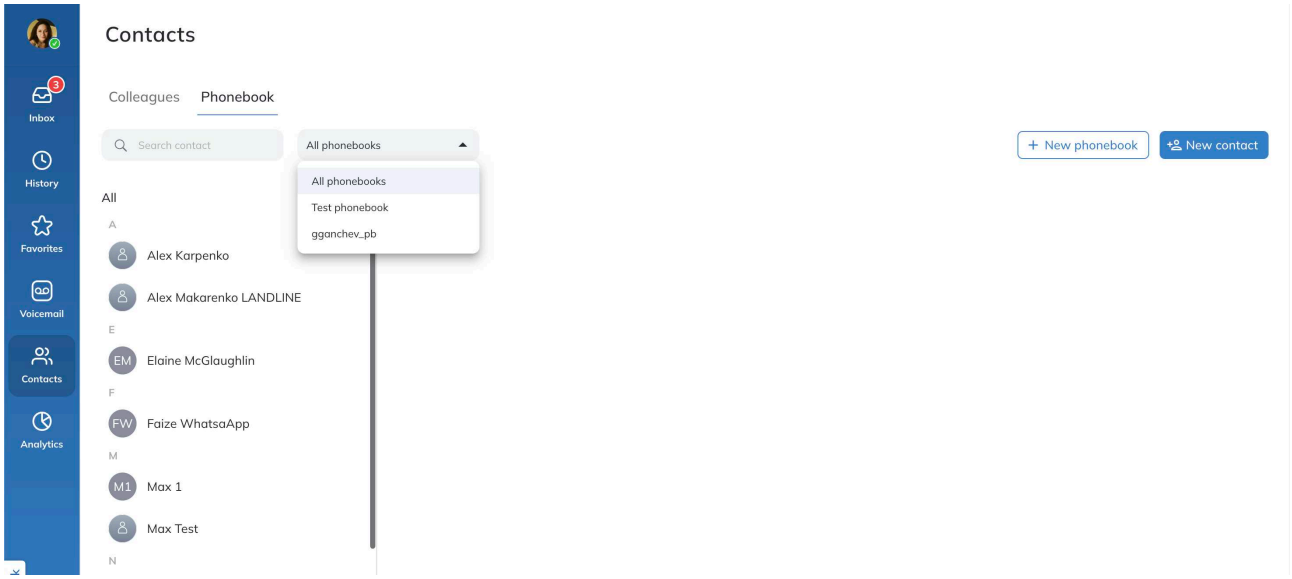
When somebody is calling your colleague, you can pickup the call, just by hovering the mouse over the colleague and clicking the pickup icon:



Also, you can manage phonebook contacts using the Phonebook tab.



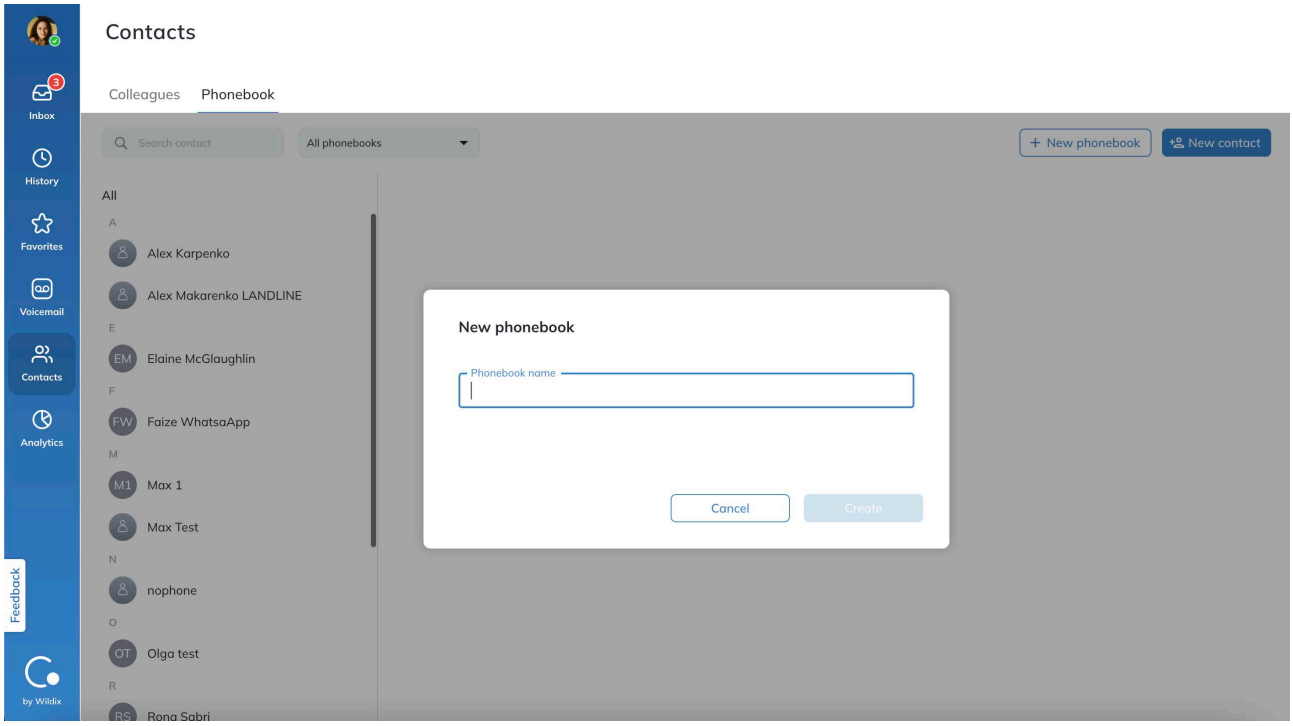
You can see colleagues from All phonebooks or choose the phonebook you are interested in. To select another phonebook, click **All phonebooks** and select the necessary phonebook:



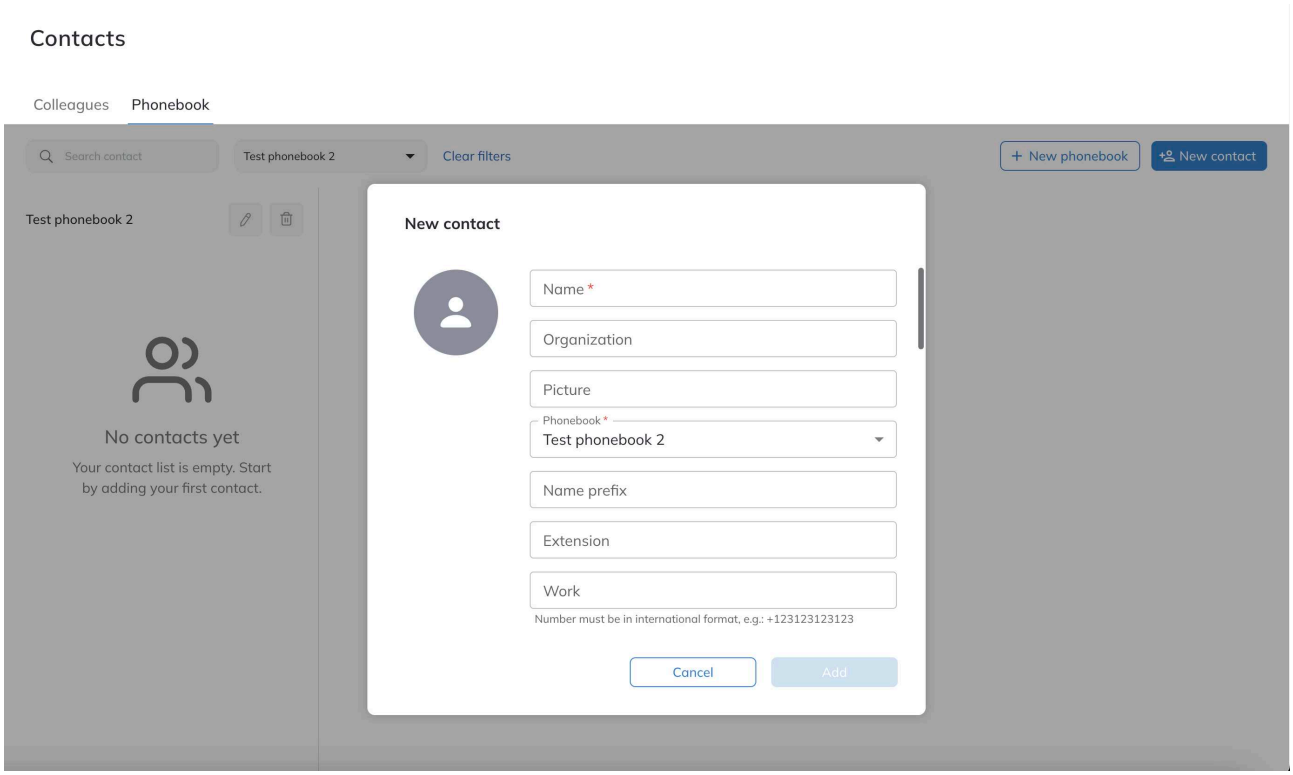
To find a colleague, use the *Search* field:



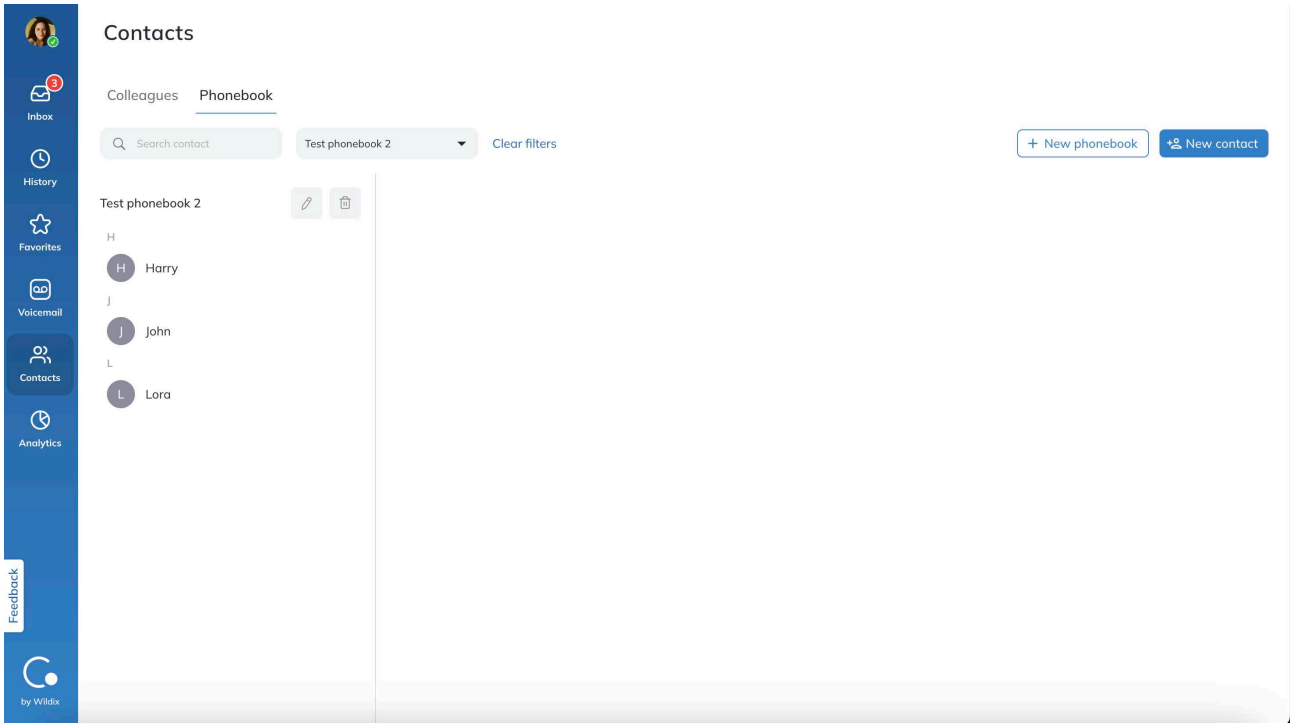
To create a new phonebook, click the **New phonebook** button in the upper-right corner of the screen. Enter the *Phonebook name* and click **Create** button:



After creating a phonebook, you can add contacts to it. To do this, click **New contact**, fill in the contact details and click **Add**.

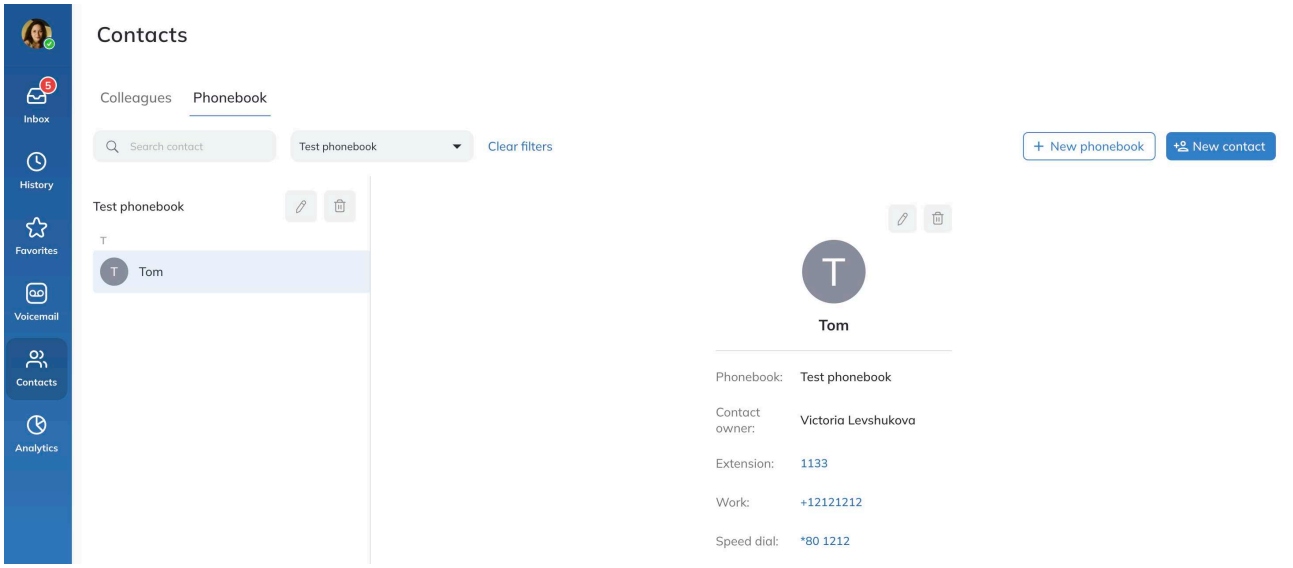


The contact will then appear in the contact list of the selected phonebook:



Speed dial

Speed dial can be configured in Contacts → Phonebook or in Phonebook section of Info frame when creating a new contact or editing an existing one.



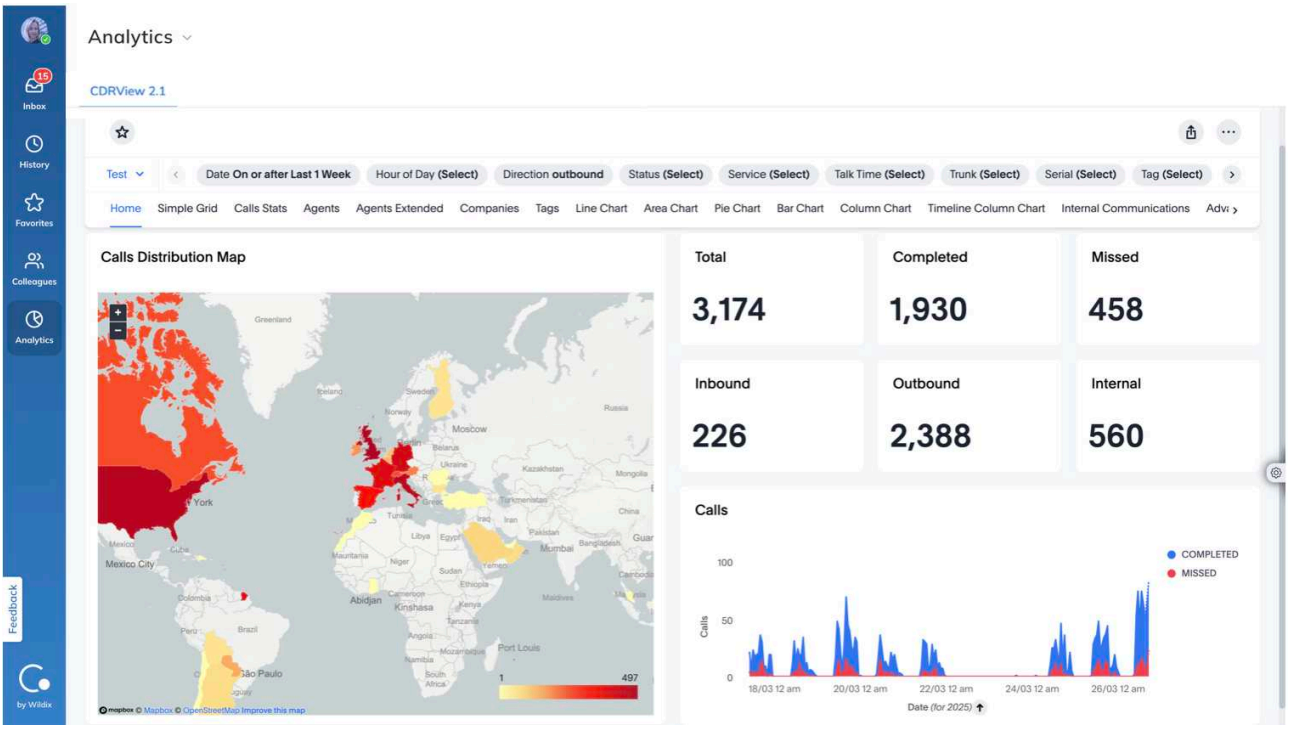
Note: When it is set, the contact can be called using the speed dial feature code (default 80, configurable in WMS → Dialplan → Feature codes), for example: 80*3241, where 80 is the speed dial feature code and 3241 is the contact's number.

Popup URL

Popup URL allows you to open a web page upon receiving or placing a call and pass parameters (static parameters or supported variables). For more details and setup instructions, check out the guide How to set up web application integration via Popup URL.

Analytics

Analytics in Collaboration 7 lets to monitor a large variety of data you may need to analize and improve your business efficiency.



See more in documentation: How to use Cloud Analytics (CDR-View 2.0).

Collaboration 7 Chrome Extension

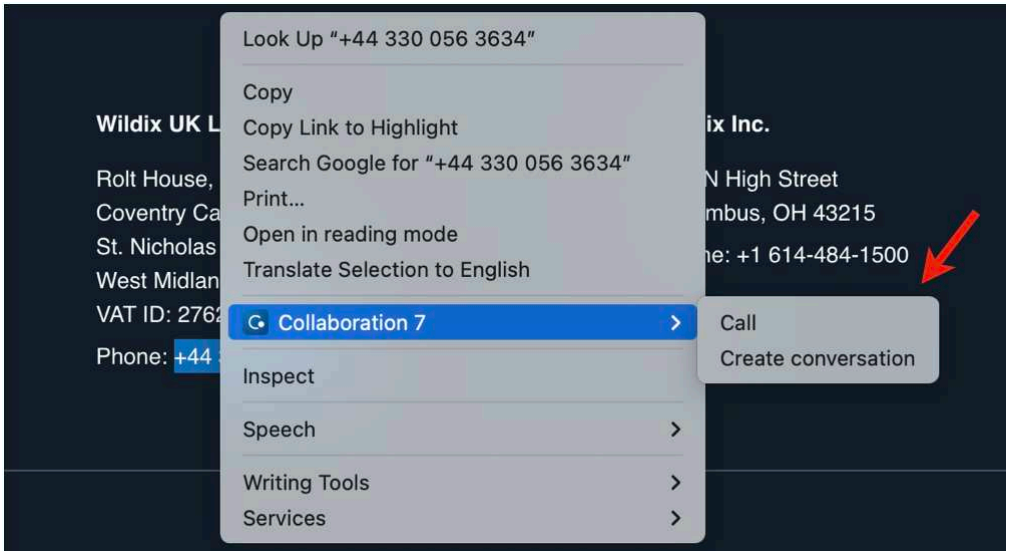
Link to access the extension: https://chromewebstore.google.com/detail/collaboration-7/lppmjfhhdefbmincgpkgnlbfgnfnloek

Features:

- *Quick access to Collaboration 7 from Chrome toolbar*: click the Collaboration 7 icon to instantly open browser tab with Collaboration 7 running
- *click2call functionality*: right-click on a phone number on a web page, choose Collaboration 7 and select **Call**
- *TEL URL support*: make calls with just one click. The supported URLs: tel, sip, callto, wildix, Collaboration 7

Note: The support starts from WIService 3.19.4 or higher.

- *Creating conversation*: right-click on an email address from a web page, choose Collaboration 7 and click **Create conversation**



- *Schedule Collaboration 7 meetings right in Google/ MS 365 calendars*: click *Add Collaboration 7 meeting* button in Google / MS 365 calendar and link to Collaboration 7 conversation is automatically added in the event description. When you add participants and save the event, a dedicated conversation with the participants is created in Collaboration 7 (see more details in the section Schedule event in Google/ Microsoft 365 calendars of this guide)

Collaboration 7 Edge Extension

Link to access the extension: https://microsoftedge.microsoft.com/addons/detail/collaboration-7/iplhliegaaoeaagffobfkafjmmjddglh

Features:

- *Quick access to Collaboration 7 from Edge browser*: click the Collaboration 7 icon to instantly open browser tab with Collaboration 7 running
- *Google and Microsoft 365/Outlook Calendars:* create and join Collaboration 7 meetings directly from Google and Microsoft 365/Outlook calendars
- *Quickly initiate calls and start conversations from a web page*

Note: The support starts from WIService 3.20.6 or higher