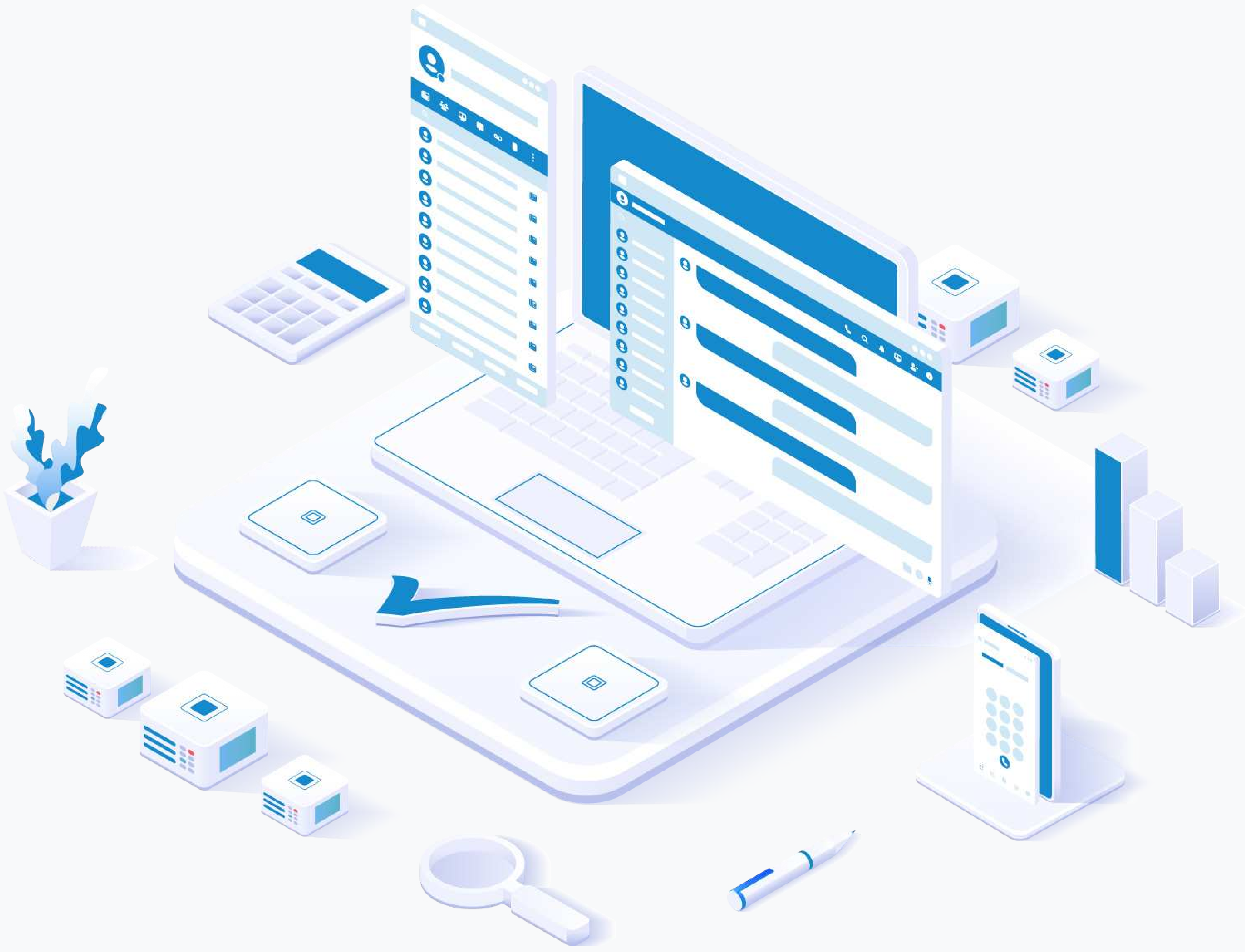


AGENT & SUPERVISOR EDITION

Communicator Next

Installation

1. Download the Communicator Next desktop app for your operating system.
2. Run the downloaded installer and follow the on-screen prompts.
3. Review and accept the End User License Agreement (EULA) when prompted to continue the installation.
4. Launch Communicator Next once the installation finishes and proceed to log in.

Note: Installation is only required for the Communicator Next Desktop app. The Web app can be accessed by navigating to the appropriate IP address in your browser.

Logging In

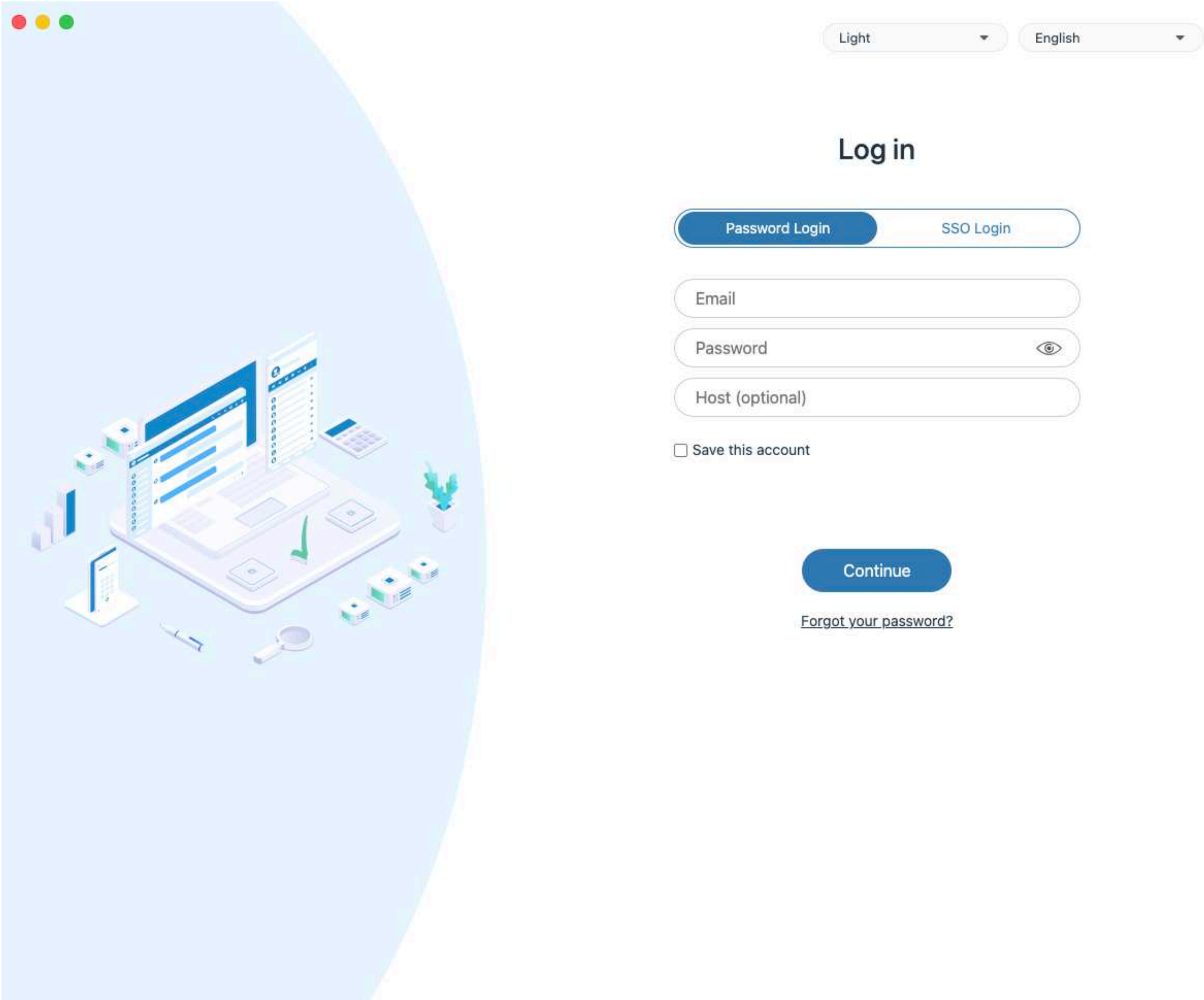
1. Open the Communicator Next application and navigate to the login page. You will see two login options at the top:
   - Password Login – Enter your email and password credentials
   - SSO Login – Use your organization's single sign-on authentication

Note: For SSO Login to function, it must first be properly configured on the server side

2. Enter your credentials:
   - Type your Email address in the first field
   - Enter your Password in the second field (click the eye icon to show/hide the password)
   - Enter Host (This field does not exist in the web application)

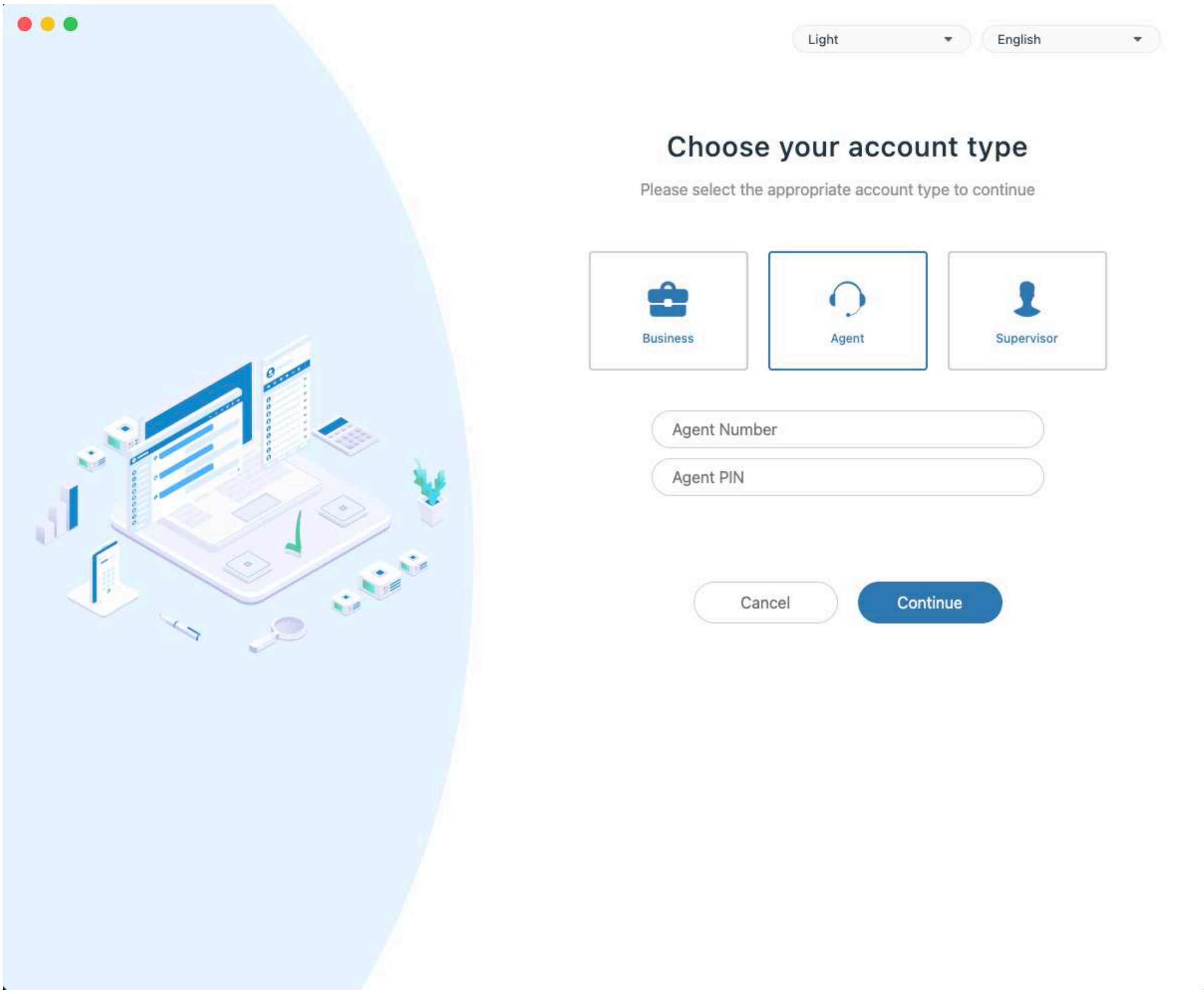
Tip: If you've forgotten your password, click "Forgot your password?" to reset it.

3. Click the Continue button to access your Communicator Next main screen.


Light
English
Log in
Password Login
SSO Login
Email
Password
Host (optional)
Save this account
Continue
Forgot your password?

Changing Edition

The application allows you to select or switch between editions based on your requirements.

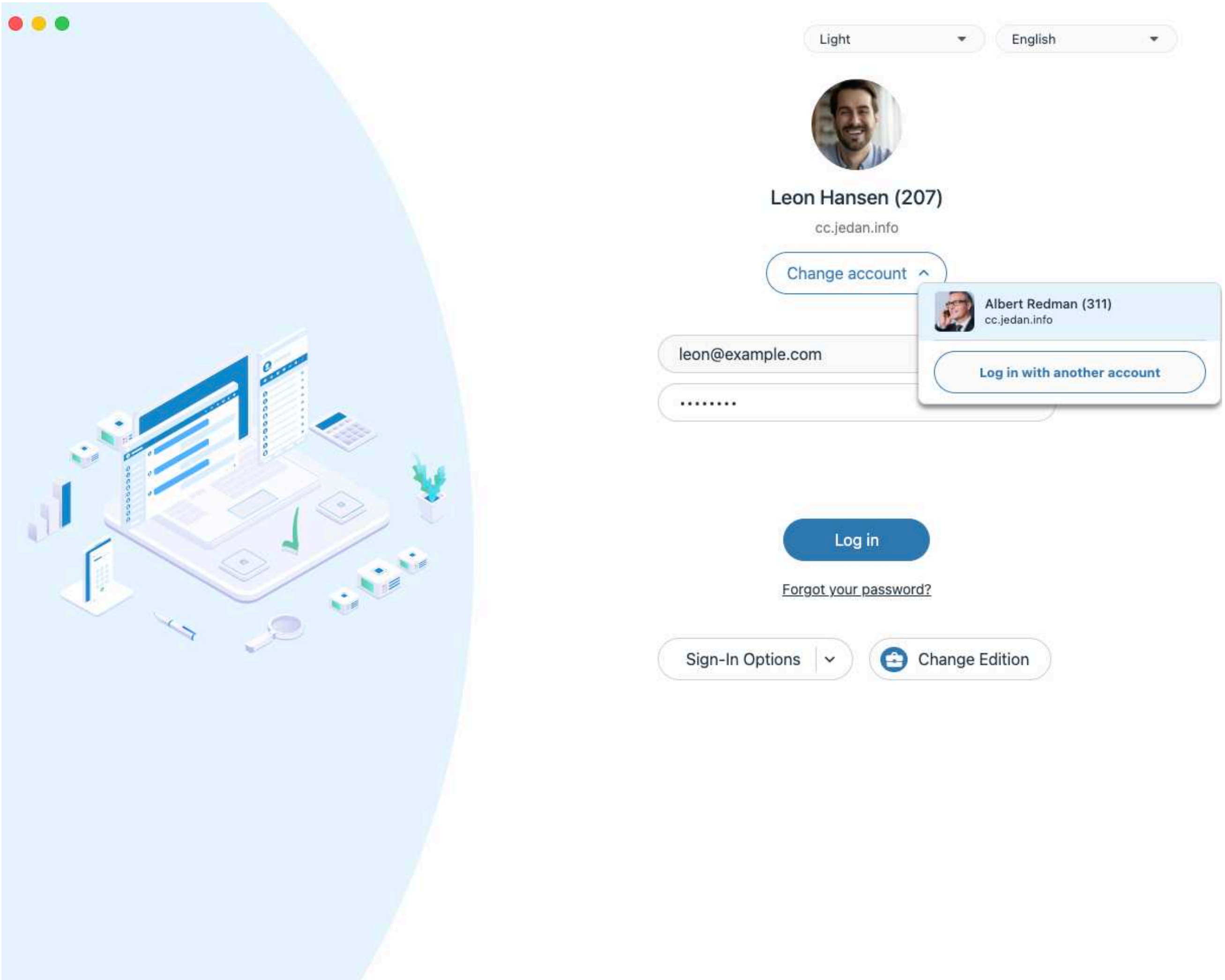


1. First-Time Login: Upon your first login, after providing valid credentials and clicking Continue, you will be automatically taken to the Edition Selection screen to choose your preferred workspace.
2. Switching Editions: To change the edition for a saved account, look for the Change Edition button located at the bottom of the login screen. Clicking this allows you to reselect your edition before entering the application.
3. Agent Credentials: To complete the login for both the Agent and Supervisor editions you will need to provide your Agent Number and Agent PIN (if required). This ensures that supervisors and agents can only view and manage the queues they are assigned to.

Note: Editions must first be properly configured on the server side to be available for selection.

Saving Accounts

1. Check the “Save this account” box on the login screen to remember your credentials for future sessions.
2. Saved accounts will be accessible via the Change account dropdown menu.



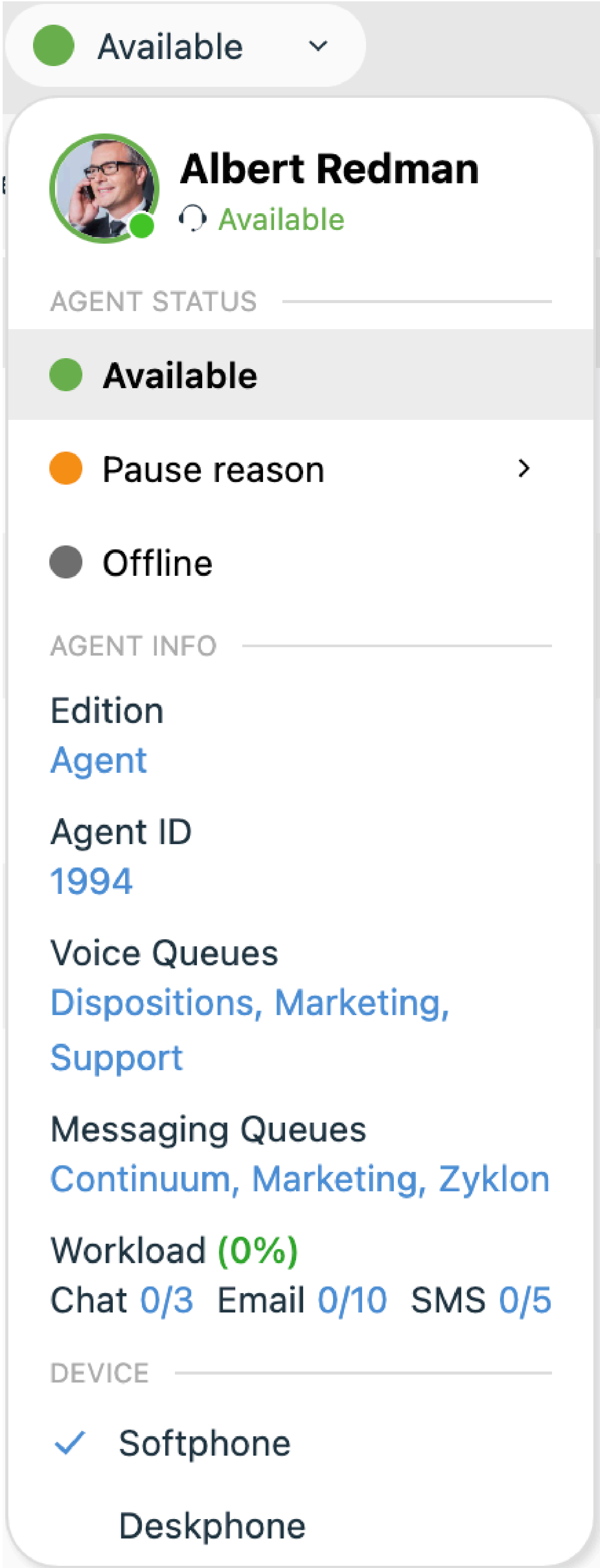
Two Factor Authentication (2FA)

To set up 2FA, log in to the app, navigate to *Online Self Care*, click the *2-Step Verification button*, and follow the instructions.

Note: The 2FA feature cannot be combined with SSO

Agent Status Management

The Agent dropdown provides centralized control over your availability, active queues, and hardware endpoints.


Available
Albert Redman
Available
AGENT STATUS
Available
Pause reason
Offline
AGENT INFO
Edition
Agent
Agent ID
1994
Voice Queues
Dispositions, Marketing, Support
Messaging Queues
Continuum, Marketing, Zyklon
Workload (0%)
Chat 0/3 Email 0/10 SMS 0/5
DEVICE
Softphone
Deskphone

Managing Your Status

- Agent Login/Logout: Use the main status dropdown to switch between Available and Offline.
- Pausing with Reasons: Select Pause reason to temporarily stop receiving calls. If specific pause reasons are configured on the server, you can select the most appropriate one from the sub-menu. When paused, a yellow bar will appear to indicate your time in that state.

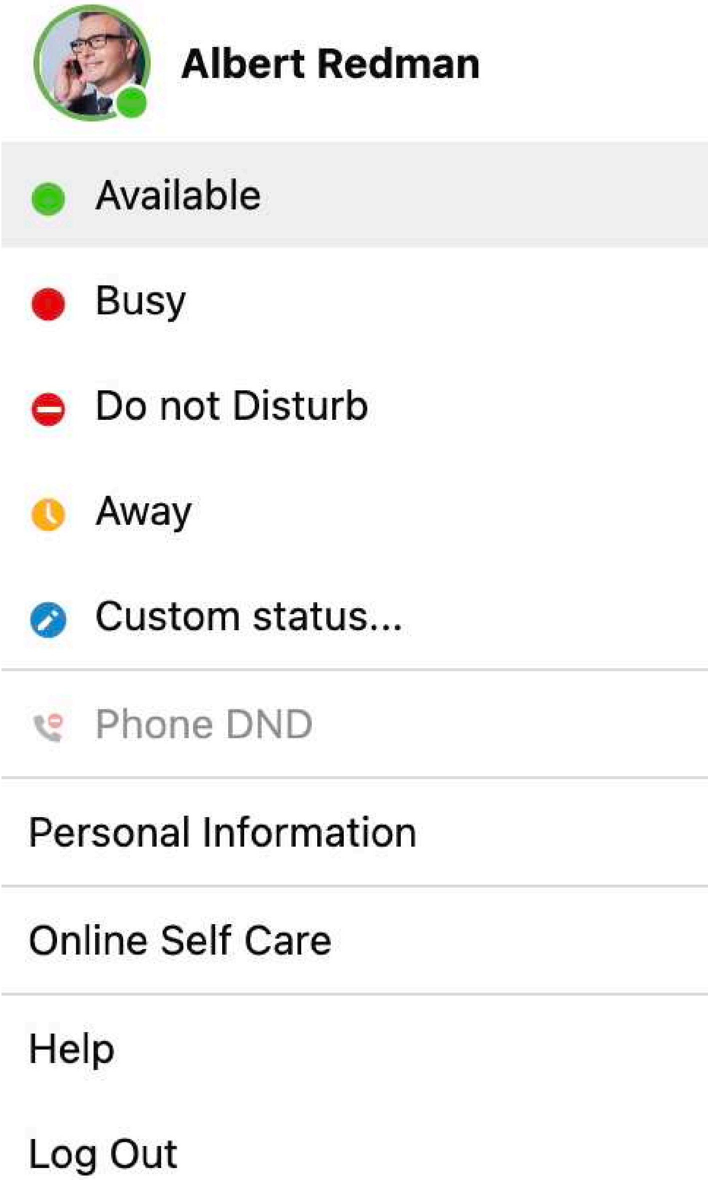
Device Selection

You can change your active endpoint directly from the status menu under the Device section.

1. Select Softphone to use the application for audio.
2. Select Deskphone if you prefer to handle calls via your physical hardware.

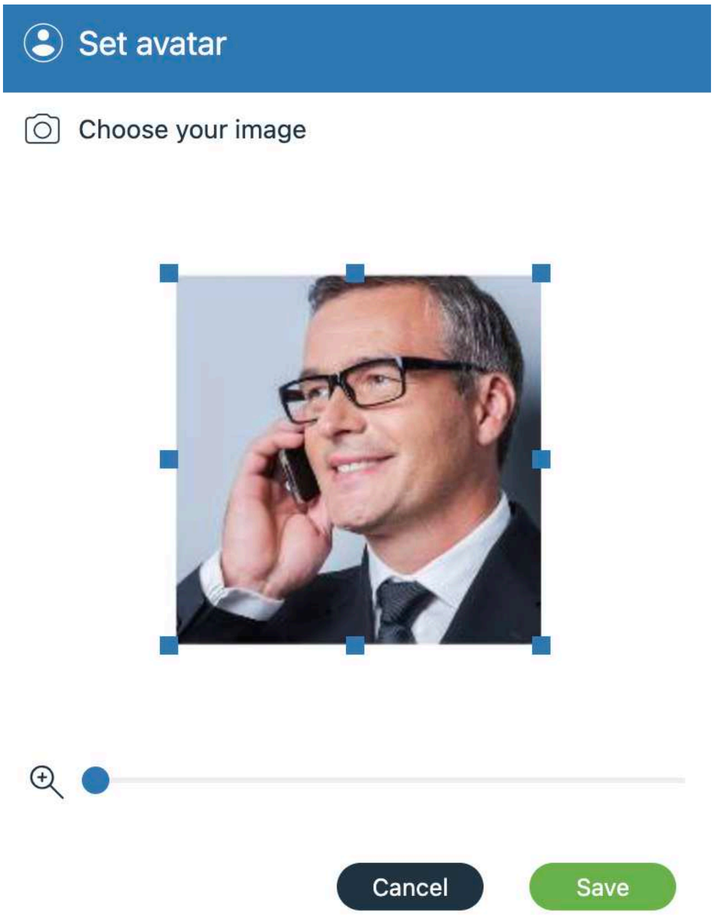
Tip: Device selection is required for inbound calls when the Auto Answer option is enabled and you are using both a softphone and a deskphone. In this case, select a device so the system knows where to direct the auto-answered call.

Profile Dropdown



Changing your Profile Picture

1. Click on your profile picture and select “Personal information” from the dropdown.
2. Click on your picture within the newly opened screen to open the “Change avatar” dialog prompt, allowing you to choose whether you want to upload a whole new avatar or reset to the default one, or cancel the action altogether.



Changing your Current Status

1. Click on the “Status” indicator within the profile picture.
2. Select a corresponding status from the options given in the newly opened status dropdown menu.

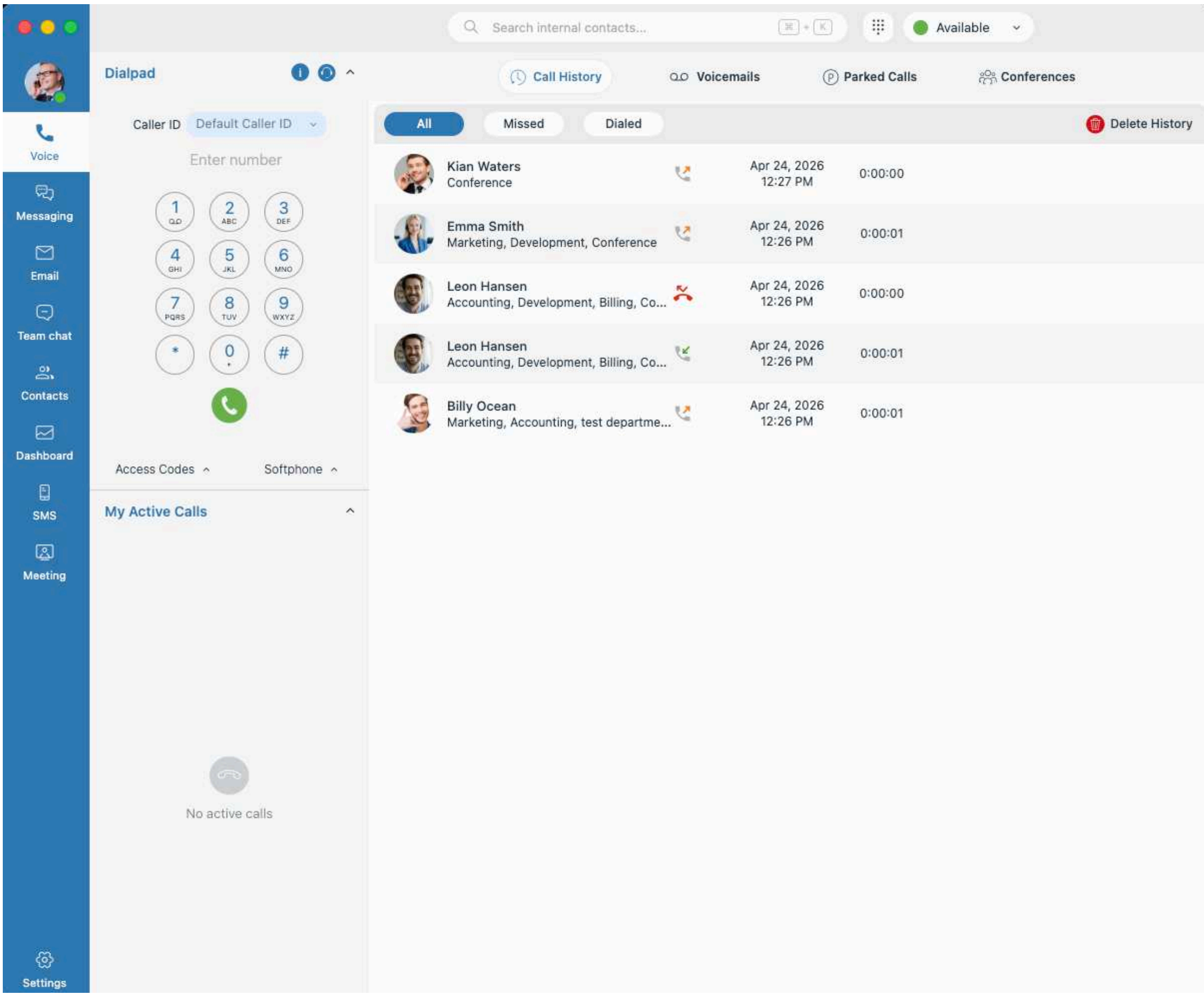
Phone DND

1. Select Phone DND from the profile dropdown to toggle “Do Not Disturb” for your telephony services. When enabled, a status indicator will appear in the top bar of the application.
2. Click the *Switch to available* button within the indicator to change your status back to available.

Accessing Online Self Care

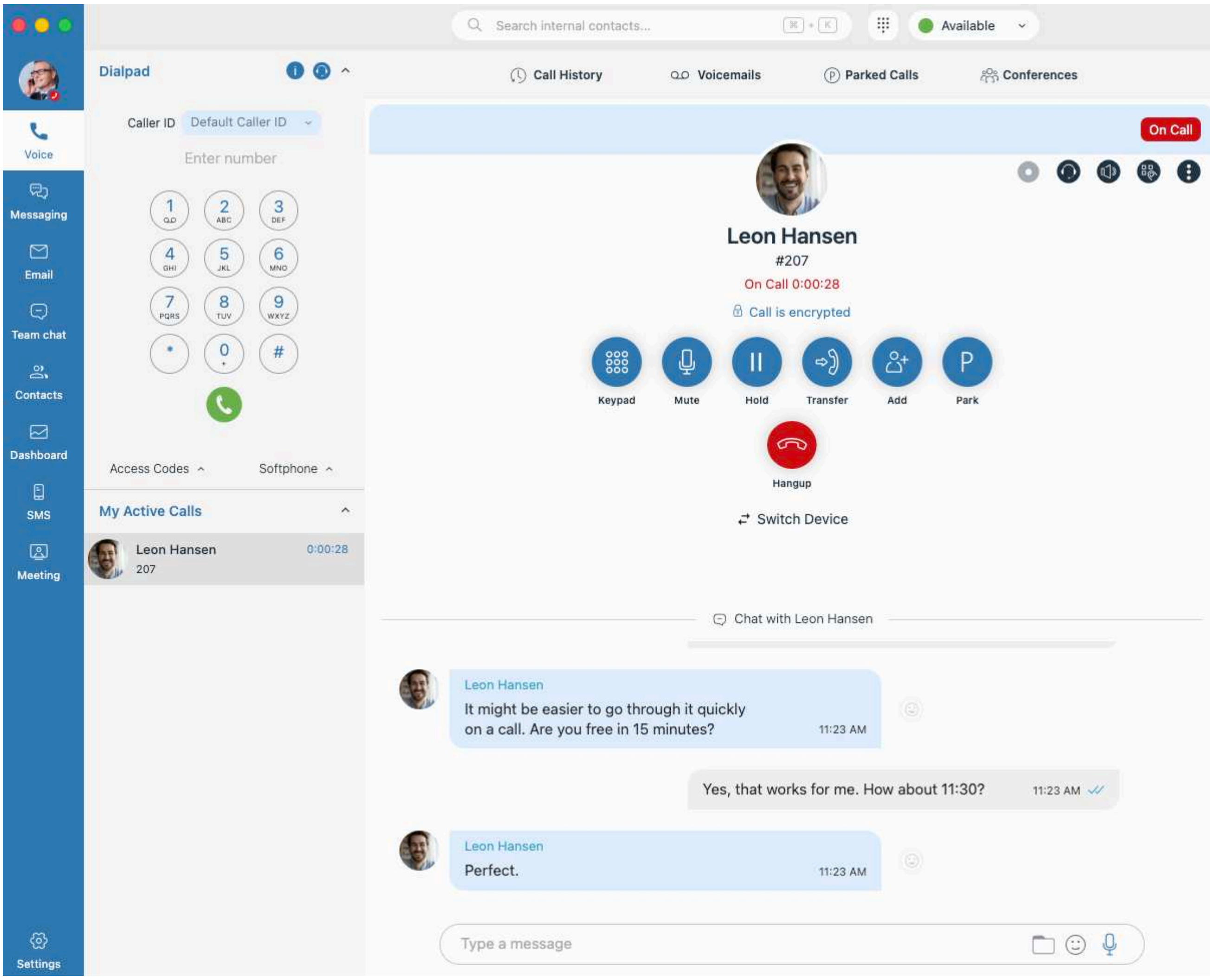
1. Selecting the Online Self Care option will automatically open a new tab in your web browser. To access the portal, you will be required to enter your credentials to log in securely.

Calls



Establishing a Call

1. Go to the Voice tab for full access to the dialpad and your call history.
2. Tap the dialpad icon at the top for a quick-entry popup to dial a single number instantly.



Quick Call

A dialpad popup is available on the top bar, allowing for quicker access to the dialpad from every tab in the application.

1. Click on the dialpad popup from any tab in the application.
2. Enter the desired number, and initiate the call instantly.

Change Caller ID

1. Access via Dialpad: Open the dialpad from the Voice tab or via the Dialpad popup.
2. Click on the Caller ID dropdown menu located directly above the number input field.
3. Select the desired phone number or name from the list of available identities assigned to your account or hide the Caller ID.

Note: If this functionality is not enabled for your extension on the server, the option will be disabled.

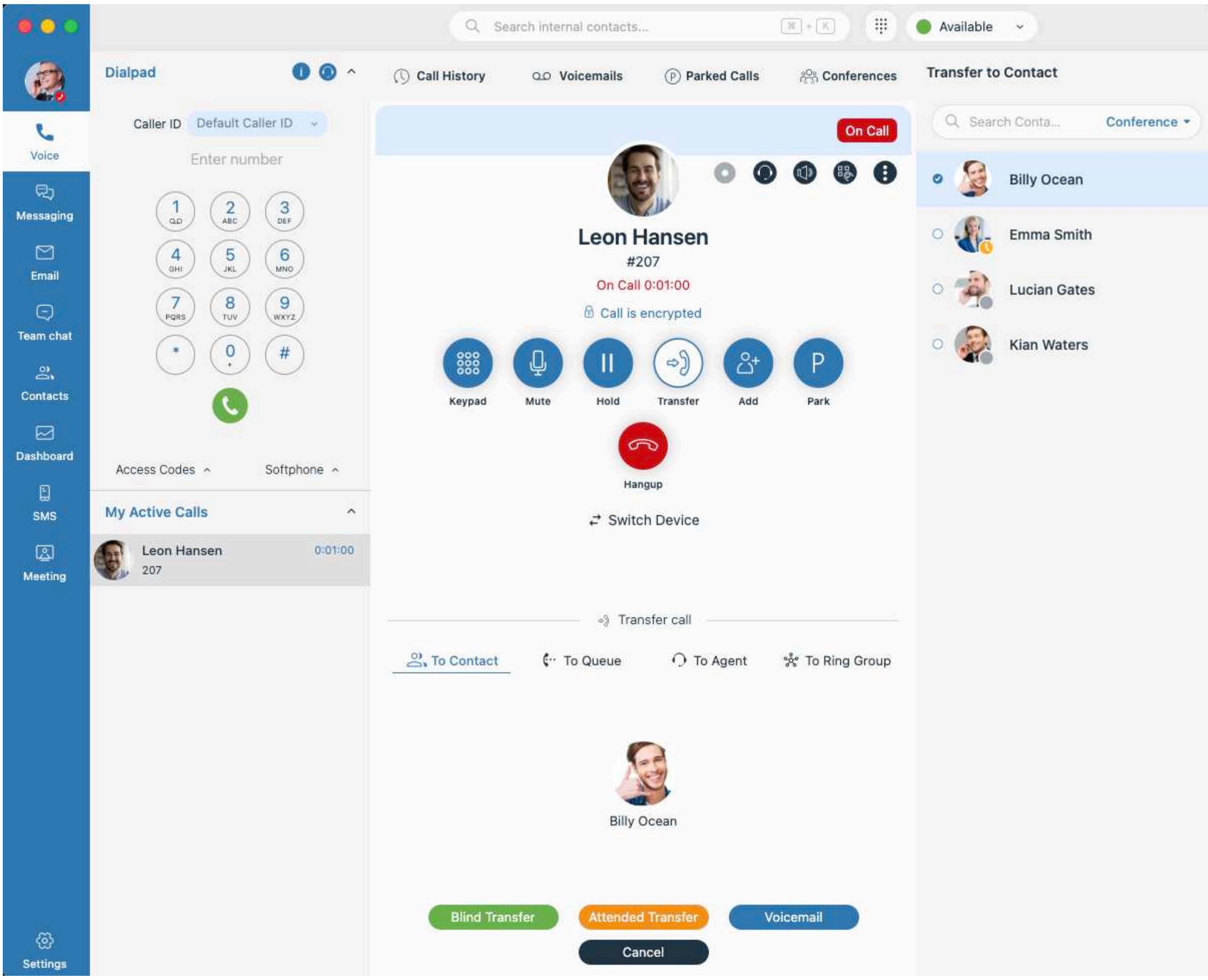
Adding People To An Existing Call

To bring more people into your existing call:

1. Click the “Add” button.
2. Use the input field to select the contacts you want to include.

Transferring A Call

1. To transfer a person in a call over to another, click on the “Transfer” button which will bring the “Transfer” dialog box up.
2. Select the desired transfer option from the fields available from the dropdown menu, choosing between:
   - An agent or contact (internal or external) that you can manually input or search for
   - An existing queue chosen from a list
   - Existing ring groups
3. After inputting everything, choose between a blind or attended transfer, or simply transfer the person directly to voicemail.



Drag to Transfer

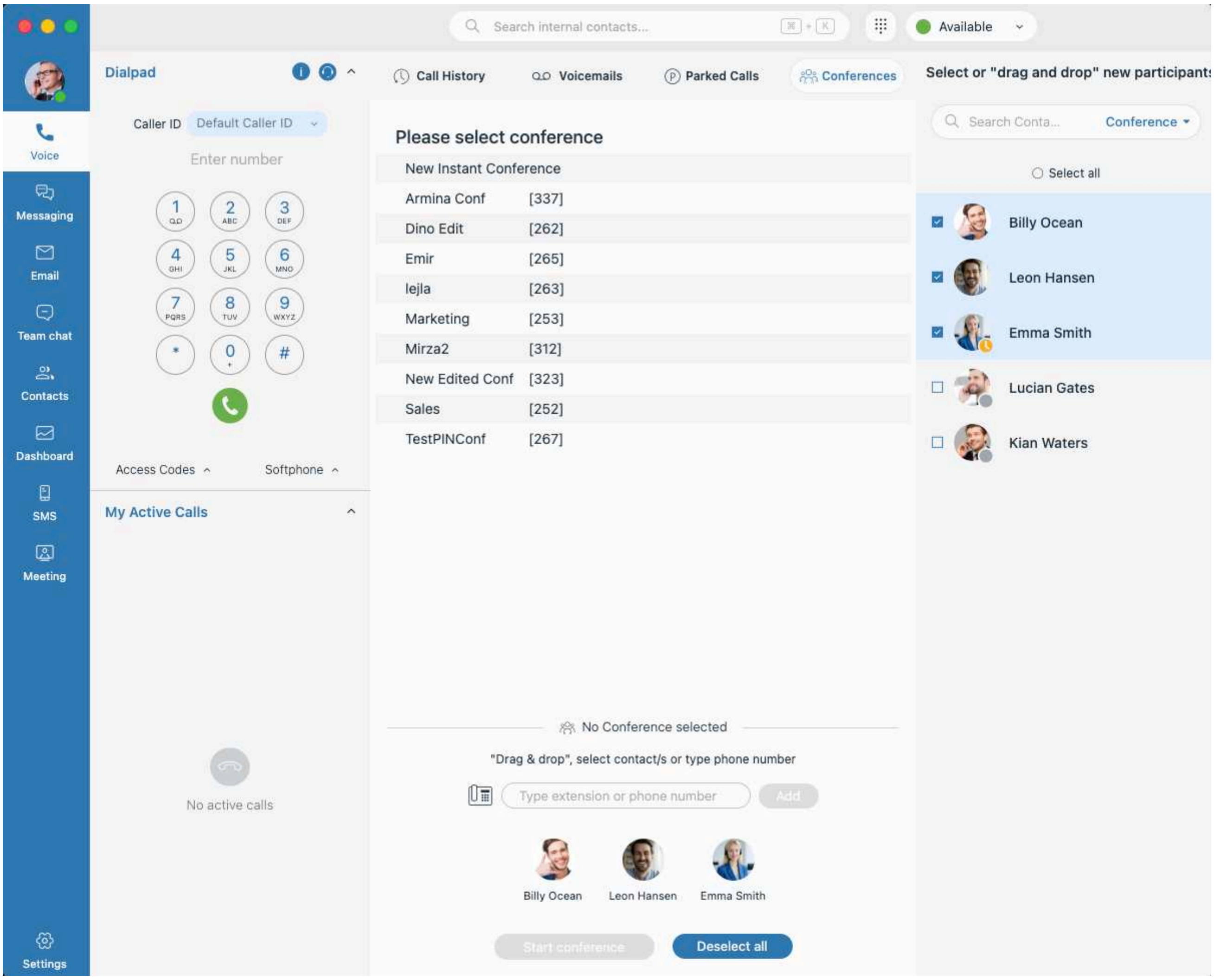
An alternative method of call transfer is to click on the icon of the user currently in the call and drag them over to the person on the contact sidebar you want to transfer them to. There, an overlay will appear with the “Blind” and “Attended” options where you can drop them over your desired transfer method.

Switching Device During a Call/Calling From a Different Device

- During an Active Call: To switch the call to another device, click the Switch Device button, and select your desired endpoint. The call automatically transfers and rings your new device.
- Before You Dial: Open the Dialpad popup, click the Switch Device button, and use the device dropdown to select which device you want the call to originate from.

Creating a Conference Call

1. Navigate to the Voice tab and click on the Conferences button to open the Conferences screen.
2. Choose either “New Instant Conference” or a Static Conference room from the list provided.
3. Add one or more participants either from your contact list (to Add External Contacts, select External Contacts from the dropdown menu to filter the list accordingly) or by typing the extension or phone number in the provided field.
4. Click the Start Conference button.



Parking a Call

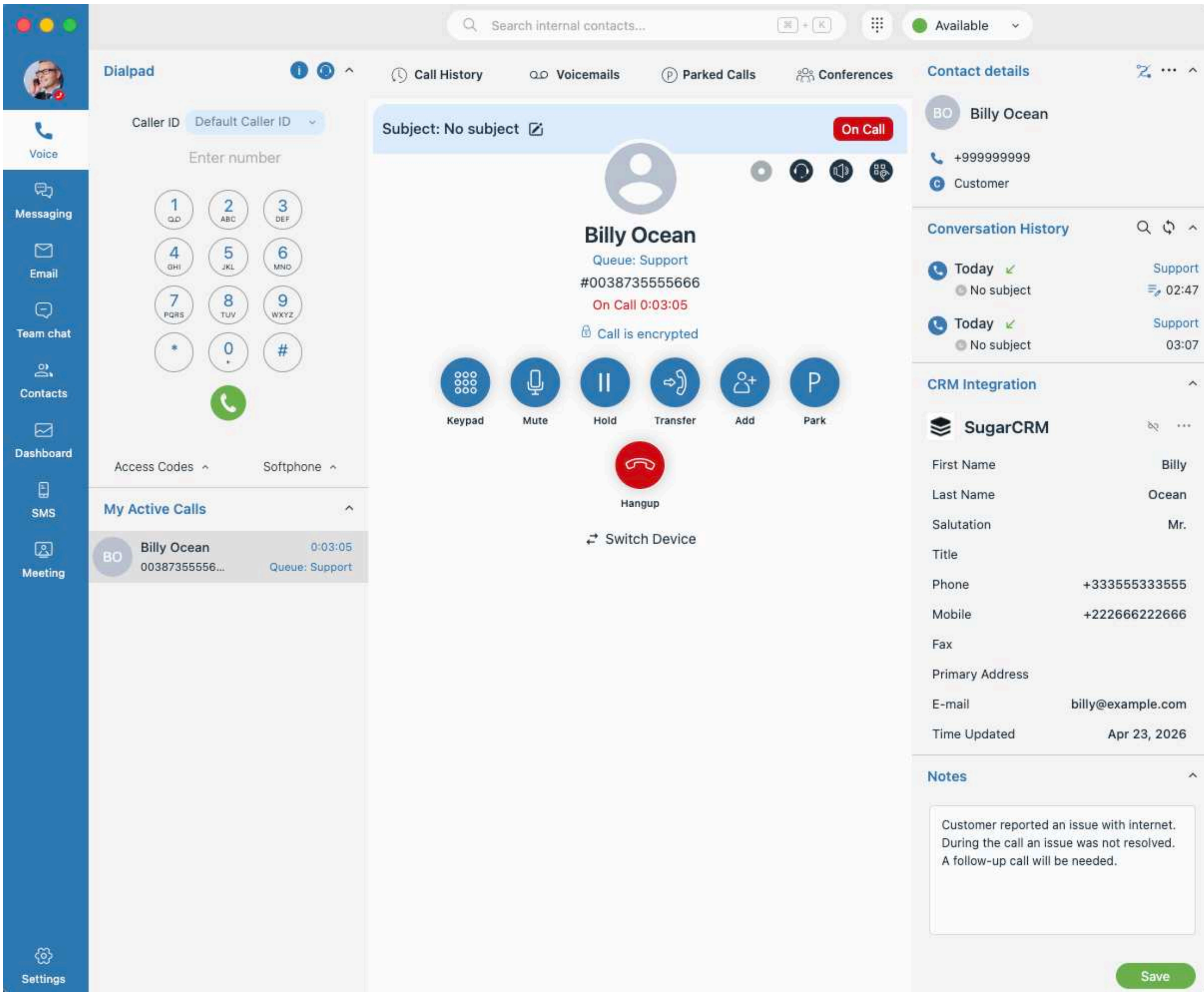
1. During an active call, click the Park button to open a dropdown menu and select a specific parking lot to place the call in.
2. Once a call is parked, anyone can pick it up by pressing the Pick Call button next to the parked call or dialing the number of the parked extension.

Checking Voicemail

1. Navigate to the Voice tab and select Voicemails from the top menu to view your messages.
2. Toggle between the New and Old sub-tabs to organize your received voicemails.
3. Use the control bar at the bottom to interact with a selected voicemail.

Contact Card

The Contact Card is a comprehensive side panel that appears during active interactions, providing a unified view of customer identity, history, and integrated CRM data.



Contact details

1. **Identity:** View the contact's name, initials, phone number, and account type (e.g., Customer) at the top of the card.
2. **Contact Actions:**

- **Add/Edit Contact:** Use the icons in the header to manually create a completely new contact or update the details of an existing record. When adding a contact during an active voice or other conversation, the new contact is automatically linked to that conversation. Contact visibility (Global, Department, or Private) can be set at creation or edit time.
- **Link/Unlink:** Use the link icon to associate a voice or other conversation with an existing contact — either from suggested matches or by searching for a contact directly. During the link operation, you can also update the contact's information. Use the unlink icon to remove an incorrect connection.
- View the date and direction (inbound/outbound) of previous calls or messages.
- Monitor the subject and duration of past interactions.
- Use the Search icon to filter and find specific events within this contact's history.
- Use the Refresh icon to update the history log manually.
- Conversation Details: When selecting an entry within the conversation history, you can now view specific conversation details or notes for deeper context.

3. **Conversation History:** During a voice or messaging conversation, agents can access a unified log of recent interactions with the selected contact across all channels (calls, chats, emails, etc.) — providing full context regardless of which channel the customer used previously.

Conversation History
Subject: Trial version

Conversation Details   Notes

Ignacio Summers
(10081375645245149)
Inbound · 2d 23h

Conversation ID 20504 | Start Time Apr 24, 9:58 AM | End Time Today, 9:41 AM
Agent Albert Redman | Queue Continuum | Queue ID 0bf1020f-d32b-42ad-8278-3f3d5e5d56bf

Messages

platform. 10:04 AM

AR **Albert Redman**
I hear you—that "app fatigue" is exactly what we help solve. At its core, our app is designed to unify your communication, task management, and file sharing into one streamlined interface.

We have a few key modules:

Projects: This is the hub for task lists, Kanban boards, and Gantt charts.

Connect: Our built-in team chat and video conferencing tool.

Drive: Integrated file storage and collaborative document editing. 10:05 AM

NN Ok, that sounda comprehensive. We are interested. 10:06 AM

AR **Albert Redman**
We're glad to hear that! I can set you up with a free 14-day trial so your team can test out the workflow firsthand. 10:06 AM

NN Yes, a trial would be the perfect next step. Thanks for your help. 10:07 AM

Agent Albert Redman changed ticket status from Open to Waiting (Apr 24, 10:48 AM)

Today

Conversation closed (Today, 9:41 AM)

CRM Widget

The CRM Widget provides a centralized view of contact data retrieved from your active CRM integrations during external interactions. The widget pulls and displays relevant contact information from any currently connected CRM systems.

Quick Setup:

1. If no CRM is integrated, the CRM widget will display a "Connect to a CRM" link.
2. Clicking the "Connect to a CRM" link will instantly redirect you to Settings → CRM to manage your integrations.

CRM Widget actions

Within the CRM widget, you can manage how conversations are associated with your CRM data through the following actions:

- Linking a Record: This "connects" an active call or messaging/email conversation to a specific CRM record (e.g., a Contact or Lead). Once linked, the widget will automatically display that contact's comprehensive information whenever you engage with them.
- Suggested Matches: The widget automatically displays suggested records. If only one match is found, the system will perform an Automatic Link.
- Manual Search: You can search for records by name, phone, or email using the input field. A global CRM search triggers once you enter at least 2 characters.
- Unlinking a Record: If a record is linked incorrectly or you wish to remove the connection, click the Unlink button. You will be prompted with a confirmation dialog to prevent accidental unlinking.
- Rematching a Record: This serves as a shortcut to switch the current link to a different record. Access this by clicking the three-dot menu and selecting Rematch. The current record remains linked until you successfully select and confirm a new one.
- Creating a New Record: If no existing records match your needs, click Link/Create new record followed by the Create new object button.
- Select the record type (e.g., Contact, Lead) from the dropdown.
- Fill in the required fields; the system will alert you via a toast notification if mandatory information is missing.
- Upon successful creation, the new record is automatically linked to the conversation.
- Editing a Record: To update information on a linked record, select Edit from the three-dot menu. Modify the necessary fields and click Apply to save your changes.

Note: The specific fields displayed within the widget and the actions available to you (such as editing or creating records) depend on your PBXware configuration and assigned user permissions.

Note: For all actions (linking, unlinking, creating, or editing), the system provides real-time feedback via toast notifications to confirm success or alert you to errors, such as network issues or API problems.

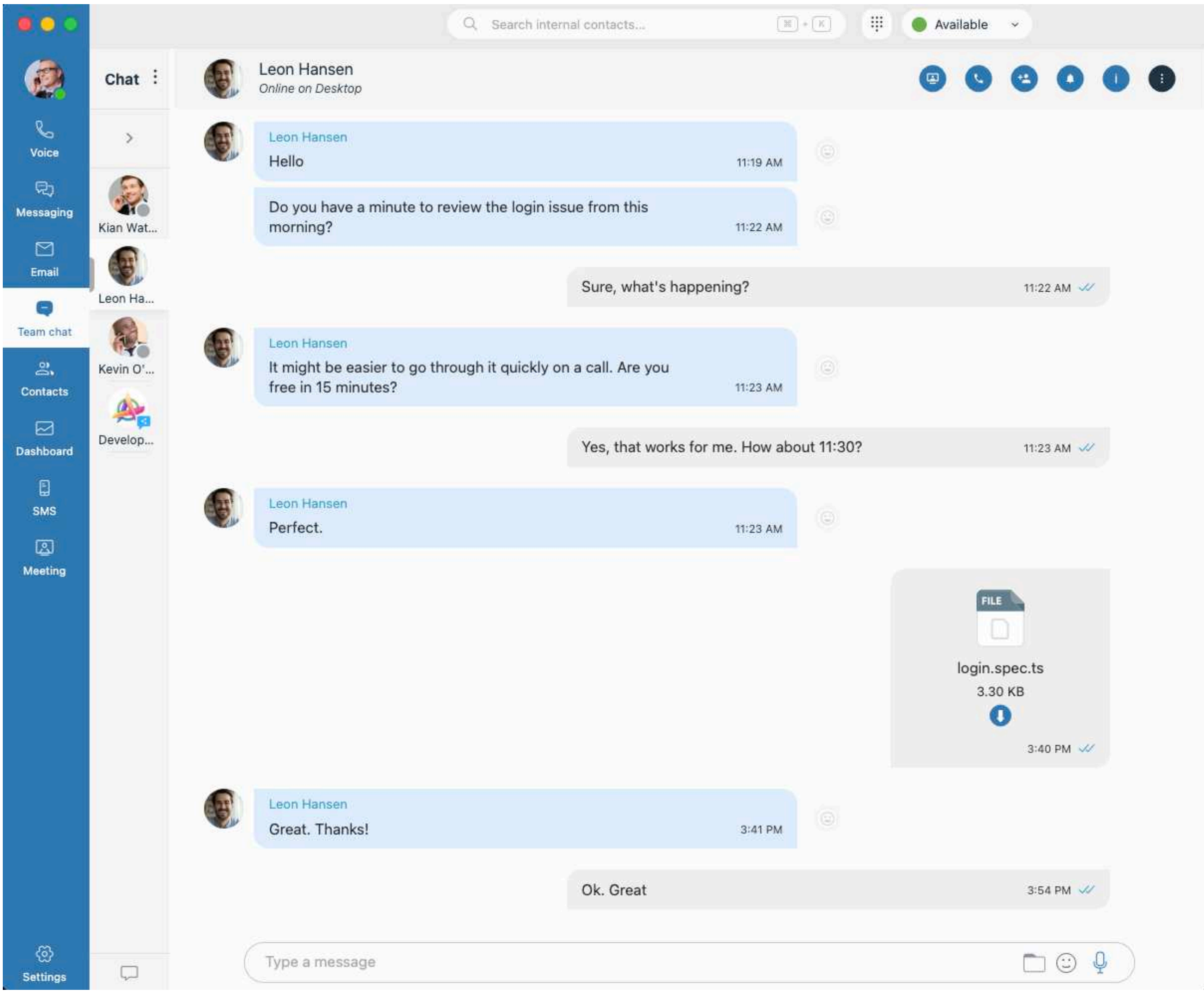
Notes and Engagement

1. **Internal Notes:** Use the dedicated text area to document important details about the interaction, such as unresolved issues or required follow-up actions.

2. **Save:** Click the Save button to ensure your notes are attached to the interaction record for future reference by yourself or other team members.

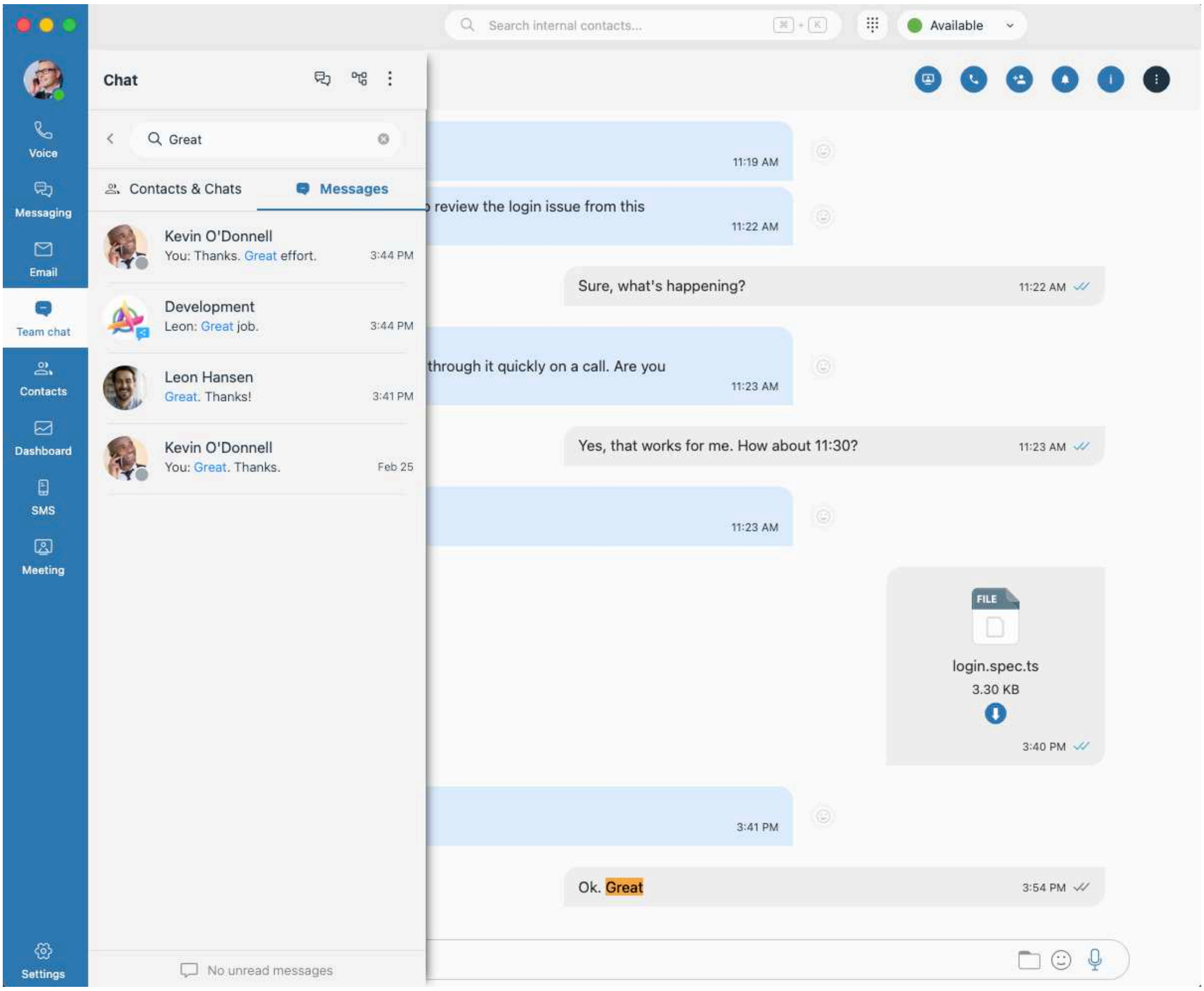
Team Chat

Click the Team Chat icon in the navigation bar to view your active conversations.



Chat Search

Use the search bar to find conversations by contact name or to search within message content. Results are separated into Contacts & Chats and Messages tabs.



Chat History Synchronization

To ensure a seamless experience across all your devices, the application automatically synchronizes your message history every time you log in.

- Automatic Sync: Upon login, the application verifies and updates your chat history so that all messages are consistently available on your current device.
- Sync Indicators: While synchronization is active, an indicator appears to let you know a sync is in progress.

In case of any issues regarding chat sync on any device, click on the "□" icon, navigate to the "re-sync the entire chat history" option and click it to manually force a resync in order to attempt to fix existing issues.

Start Conversations

1. Search for a contact using the search bar, or start a conversation by hovering over a contact in the Contacts list and clicking the Chat icon.

Managing Group Chats

1. Click on the “Create group” icon which will bring up the “Create group” dialog.
2. Adjust your group preferences from the options available:
    - Group name
    - Shared group toggle
    - Group participant list
3. Once everything is set up, click on the “Create” button to create your group.

Interacting Through Chat

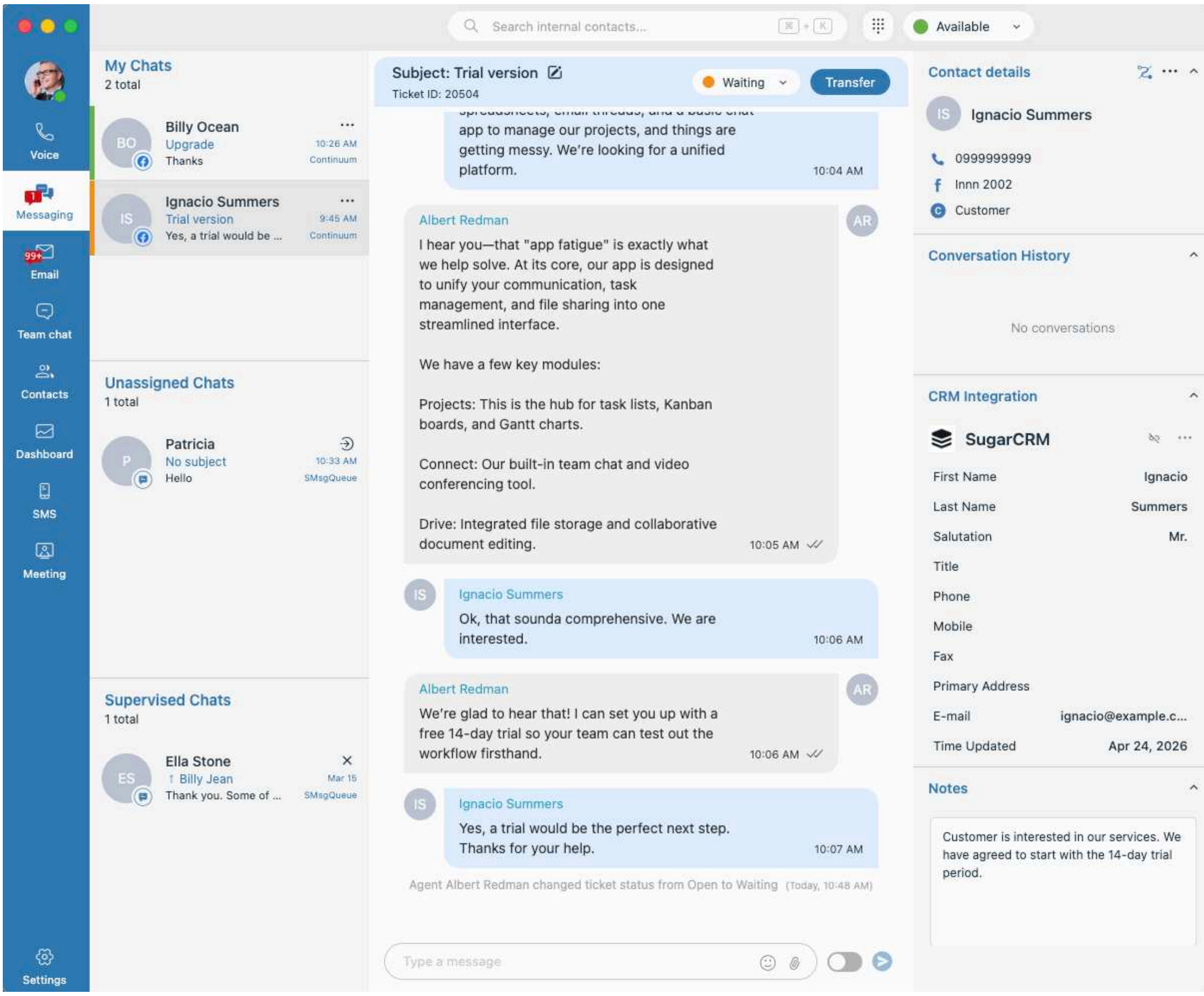
1. Organize a meeting with the participants of the currently selected chat/group by clicking on the “Organize a meeting” icon and choosing whether you want to start the meeting right away, or schedule it for a later date, similar to the process found under “Scheduling a Meeting”.
2. Drag the participant(s) of the current chat into a (conference) call by clicking on the “call” icon.
3. Add more users into a group or create a group with additional participants by clicking on the “Add users into this chat” icon, prompting you to create a new group with the original chat participant or expand your existing group.
4. For chats with a singular participant, you can notify that participant that you require their presence by clicking on the “Ask for attention” icon which will send out a push notification on their side.
5. Check who the chat admin of a group is as well as who the participants of a selected chat conversation are by clicking on the “Chat info” icon.
6. Access additional chat actions by clicking the More options (three dots) icon in the chat header. The available options depend on the chat type (Group or One-on-one chat).
7. Type a text message to the rest of the participants within the chat/group in the message field and press enter to send it.
8. Share files and images with the participants of the chosen chat/group by clicking on the “Send File” icon and navigating your storage for the chosen file in order to attach it to your message before sending it.
9. Alternatively, you can drag the desired file over from the file explorer and place it directly into chat. The third option can be done by simply copying the image to your clipboard and pasting it into the Communicator chat.
10. Add emoticons to your messages by clicking on the “Emoticon” icon and choosing from a wide selection of different emoticons to enrich the content of your message before sending it.
11. If your hands are occupied or you are otherwise busy, record a voice message instead of sending a text by clicking on the “Voice message” icon, speaking your response, stopping the recording and then sending it instead of your usual text message.
12. Right-click on a message to open the message context menu, which provides quick actions for managing and interacting with individual messages.
    - Reply

- Create thread (group chats only)
- Copy
- Show plain text
- Forward
- Edit (my messages only)
- Pin
- Info (group chats only)
- Delete

13. Use @name in group chats to notify specific participants.

Messaging & Email

The Messaging and Email modules provide a structured environment for managing customer interactions. These conversations are organized into specific lists to help you prioritize your workload and monitor activities.



Conversation List Types

The application categorizes conversations into three primary lists:

- My chats/Emails: Displays all conversations currently assigned to you.
- Unassigned Chats/Emails: Displays conversations waiting in queues for an agent to take ownership.
- Supervised Chats/Emails (Supervisors only): Visible only when you are actively supervising a conversation.

List Organization and Sorting

To ensure efficient response times, conversations follow specific sorting logic:

- Assigned Conversations: Sorted from newest to oldest to focus on the latest interactions.
- Unassigned Conversations: Sorted from oldest to newest to ensure the longest-waiting customers are served first.
- Automatic Selection: On initial load, the system automatically selects your first assigned conversation. Your selection is preserved even if you navigate away or refresh the page.

Details and Channel Support

- Channels: The Messaging tab supports Live Chat, WhatsApp, Facebook and SMS. The Email tab is dedicated exclusively to email messages.
- Information Displayed: Includes the customer avatar (initials), name, subject line, snippet of the last message, creation time, and the originating Queue name.

Status Indicators

- Open: Active conversation.
- Waiting (Orange): Awaiting a customer response; these are removed from your active workload count.
- Solved (Green): The issue is resolved; messaging and status changes are disabled.
- Closed by Customer (Grayed Out): The customer has ended the session.

Conversation Actions and Management

Depending on the conversation type and status, different actions are available:

- For Assigned (My) conversations:
  - Change Status: Update a conversation to Open, Waiting or Solved.
  - Edit Subject: Click the edit icon next to a subject to modify it.
  - Transfer: Use the three-dot menu to move a conversation to another Agent or Queue.

Note: The system will warn you if a queue is outside working hours or has no available agents.

- For Unassigned and Supervised Conversations:

- Assign to me: Instantly move an unassigned conversation to your “My” list to begin assisting the customer.
  - Stop Supervising: Use this action to remove a conversation from your Supervised list.

Sending WhatsApp Templates

WhatsApp templates can be sent at any time. However, in an existing conversation, a template must be used if more than 24 hours have passed since the customer’s last message.

1. Open a conversation or create a new one with the desired contact.
2. Click on the **Template** (or message template) icon in the message input area.
3. Select the desired template from the list.
4. If the template contains placeholders, enter the required values.
5. Review the final message preview.
6. Click **Send** to deliver the template.

Note: Only approved templates can be sent to customers.

Tip: Templates are typically used to initiate conversations or send notifications when no active session exists.

Real-Time Synchronization and Events

- Assignment: Newly assigned conversations move to the top of “My” list immediately.
- Automatic Linking: If a customer reopens a previously closed/grayed-out conversation, the old entry is replaced by the active assignment.
- Removal: Conversations are automatically removed from your view if an admin removes you from a queue or if the conversation is transferred to a queue you do not belong to.
- Queue/Agent Updates: The system reflects real-time changes to queue names, agent availability, and capacity counters to ensure you have the most current data.

Sneak Peek and Typing Indicators

These features provide agents and supervisors with real-time insight into conversations, allowing for faster response preparation and better coordination during internal collaborations.

- The Sneak Peek feature allows you to see what a visitor is typing before they hit send.
  - Real-Time Visibility: As a visitor types in the visitor app, their unsent text is displayed in real-time within the message list view.
  - Conversation List Integration: The sneak peek text temporarily replaces the “Last Message” snippet in the conversation list item.
  - Privacy: Sneak peek content is visible only to agents and supervisors; it is never visible to the visitor or other external parties.
  - Transition to Message: Once the visitor sends the message, the sneak peek text is replaced by the actual, finalized message in both the conversations list and the message list.

- Typing indicators inform participants when someone is actively composing a response.

Note: Sneak Peek is exclusive to the Live Chat channel, while Typing Indicators are available across all chat channels.

Agent-Supervisor Interaction

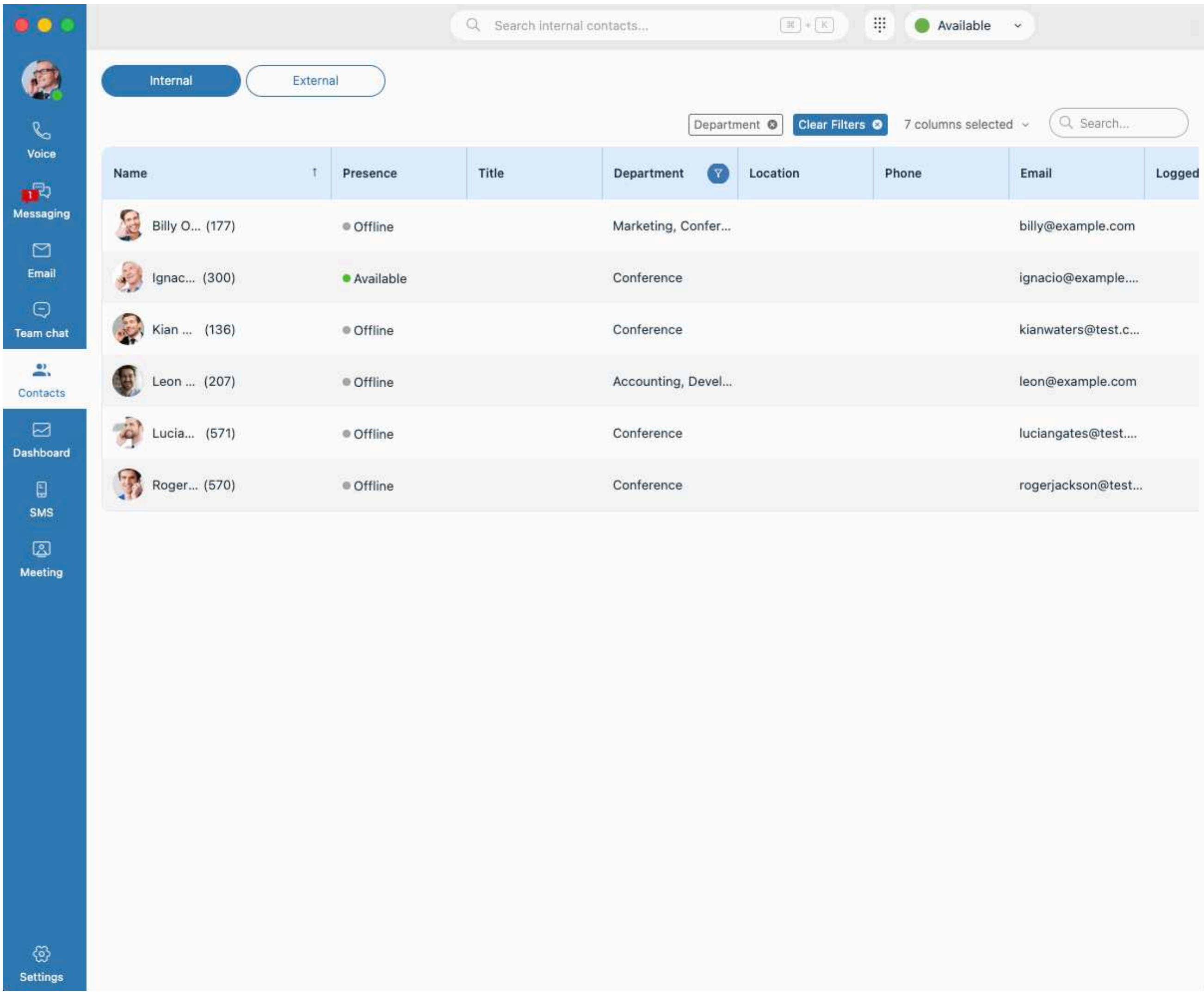
This option is designed to facilitate seamless internal communication between agents and supervisors.

- Supervision Requirement: A supervisor can only initiate or participate in a private chat within conversations that they are currently supervising.
- Private Messaging Toggle: Agents have a dedicated toggle located within the chat input field to enable or disable Private Chat mode.
- Internal Confidentiality: When the private mode is active, all messages and typing indicators exchanged between agents and supervisors are invisible to the customer.

Contacts

1. Click the Contacts icon in the main navigation bar to view your internal and external contact lists.
2. Switch between the Internal and External tabs to view different directories.
3. Customize View: Use the column selector to choose which information is displayed.

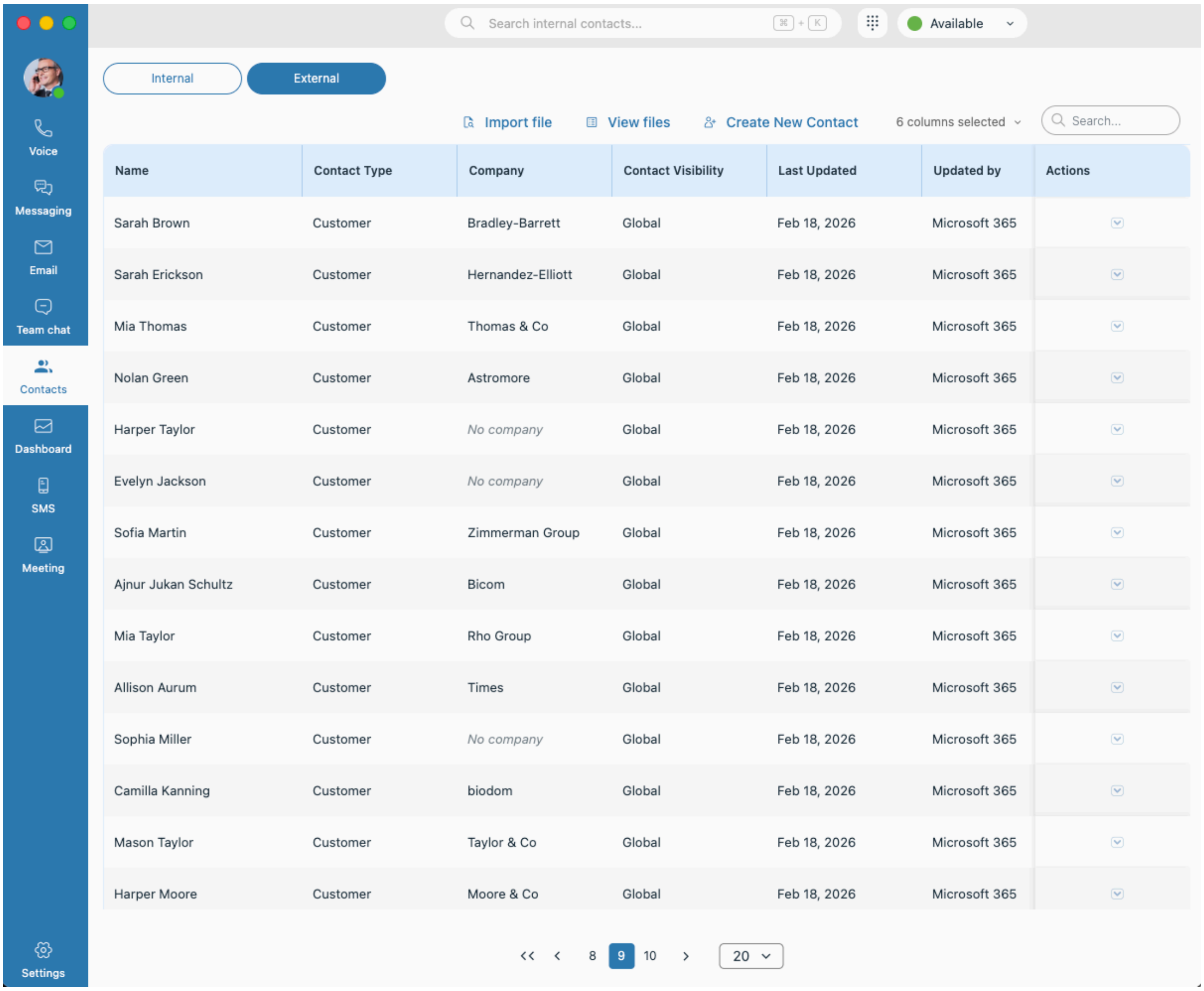
Internal Contact Management



1. Use the Search bar to find specific contacts by name, email, department, title or location.
2. Check a contact's Presence status (e.g., Online, Offline, Busy) directly in the list to see their current availability.
3. Hover over any internal contact to reveal quick-action icons:
   - Call: Initiate an immediate voice call.
   - Chat: Open a one-to-one conversation.
   - Meeting: Start an instant meeting with the contact.
   - More (□): Access additional options like viewing contact details or sending an email.
4. Hover over the columns in the internal contacts list to reveal specific filtering or sorting possibilities.
   - Use the filter menus to narrow down your list by Presence, Department, or Logged Devices.
   - Sorting Options: Organize your view by sorting contacts based on Name or Presence to prioritize active users.

Tip: Internal contacts can also be searched quickly using the search bar located in the application's top bar where quick actions are available upon hovering over any contact in the list.

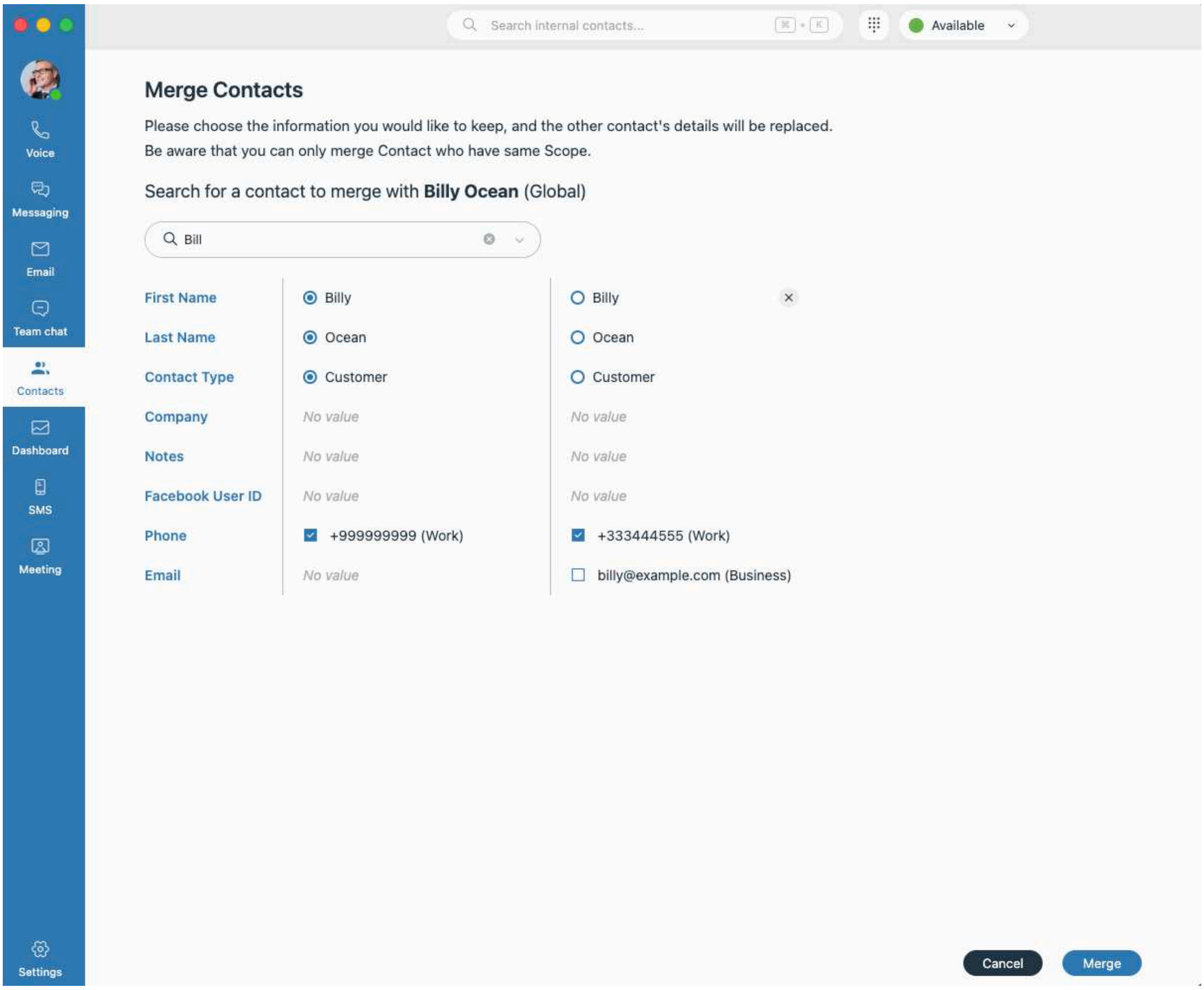
External Contact Management



1. Use the Search bar to find specific contacts by name, email, phone, or company.

2. Hover over *Contact Visibility* to enable filtering external contacts by contact visibility.
3. When viewing the External tab, you can manage your contacts based on your assigned permissions:
   - Import File: Bulk upload contacts using a CSV file.
   - Create New Contact: Manually add a new external entry to your list.
   - Manage Existing Entries: Click the action dropdown next to a contact to View/Edit their details, Merge contacts, or Delete them from your directory.

Merging combines two duplicate contact entries into a single record, consolidating their details and conversation history.



Note: Only contacts with the same contact visibility can be merged.

Across all contact categories, **Department Admins** have full management capabilities (view, add/edit, delete/merge, CSV upload/download, view uploaded files, and change visibility), while **Department Users** are generally limited to viewing, adding, and editing — with delete, merge, and administrative actions restricted unless they are the contact owner.

The scope of these permissions narrows from **Global Contacts** (broadest access for both roles) to **Department Contacts** (limited to the user's assigned departments) to **Private Contacts** (accessible only to the contact owner). Both roles can link conversations across all categories, and visibility changes are always constrained by ownership and department membership.

Dashboards

Click the Dashboard icon in the main navigation bar to monitor activity, key metrics and member engagement.

Queue Dashboards Overview

The Queues Dashboard presents multiple tabs, each focusing on a different aspect of queue activity and performance. All displayed data is scoped to the selected queues and reflects either real-time or aggregated metrics, depending on the selected tab.

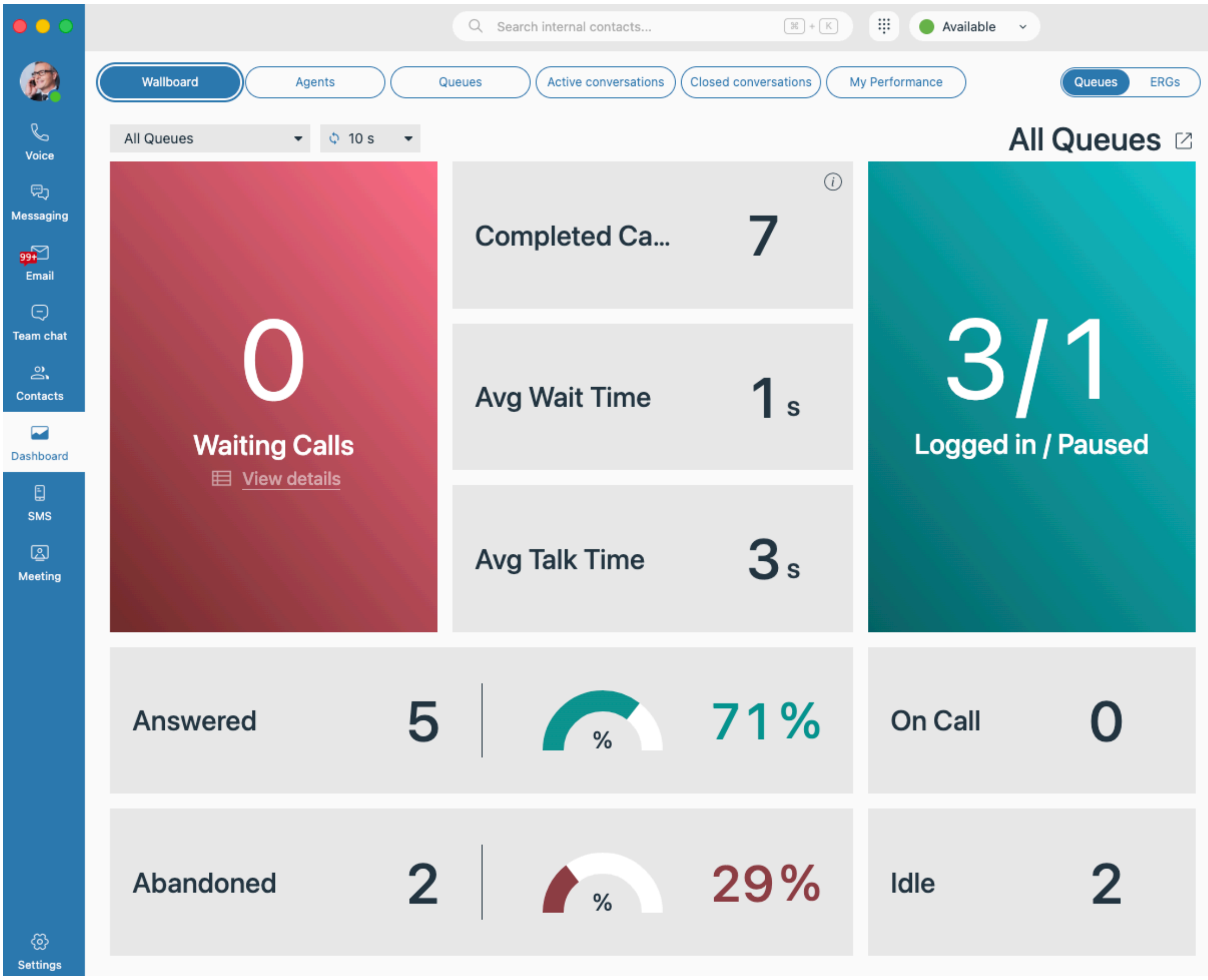
Users can:

- Search and filter data
- Customize visible columns
- Monitor agent availability and workload
- Track conversation states and performance indicators

Note: Both agents and supervisors can only view and manage the queues they are assigned to.

Wallboard (Supervisor only)

Provides a real-time overview of queue performance and agent engagement.



- The Wallboard tab can be opened in a standalone window by clicking on the Detach icon (pop-out). The detached window will automatically refresh if new filters are applied in the main application and the detach button is clicked again.

Tip: The detached window can be displayed on a large screen or TV for easier monitoring.

Agents

Displays a list of agents assigned to the selected queues, including:

- Agent state (logged in/out, time in state)
- Enabled communication channels
- Active conversations by channel
- Current workload and daily statistics

Queues

Shows detailed information for each queue, such as:

- Queue details

  - Name
  - Channels: Indicates the communication methods enabled for that queue
- Daily stats
  - Total: The overall number of conversations that entered the queue during the current day.
  - Answered: The number of conversations successfully picked up by an agent.
  - Unanswered: The number of conversations that were abandoned or missed.
  - SOA (Avg): Service Level Agreement average, measuring the percentage of calls answered within a predefined timeframe.
  - HT (Avg): Average Handle Time, representing the mean duration an agent spends on a conversation.
  - WT (Avg): Average Wait Time, showing how long customers typically wait in the queue before being connected.
- Current conversations
  - Waiting: The number of customers currently holding in the queue.
  - Active: The number of ongoing conversations currently being handled by agents.
- Agents
  - Logged in: Displays the total number of agents currently logged into the specific queue.
  - Paused: Shows the number of agents who are currently in a "Paused" state and temporarily unavailable to handle new conversations.

Useful for identifying bottlenecks and balancing traffic.

Active Conversations

Displays all ongoing conversations across the selected queues, including their current status and channel.

- All columns except Actions support filtering.
- The Channel and Subject columns do not support sorting.
- The Action column offers various actions available to the supervisor.

Note: The Actions column is visible only when logged in as a Supervisor. Available actions depend on the conversation channel.

- Voice Channel Actions
  - Take Call
  - Monitor Call
  - Transfer Call
- Messaging/Email Channel Actions
  - Transfer
  - Take over Conversation
  - Start/Stop Supervising
  - Close Conversation
  - Go to Conversation (available only for conversations assigned to the current user or supervised by them)

Closed Conversations

Lists conversations that have been completed. This tab is mainly used for:

- Reviewing historical interactions
- Auditing and analysis
- Performance tracking over time
- All columns except Actions support filtering
- The "View Details" action is available

Note: The "View Details" is available to supervisors for all conversations, while agents can access it only for their own conversations.

Note: The "View Details" opens a read-only modal which contains conversation details and notes. For voice conversations, only call recording playback is available (if applicable).

My Performance

Provides a personalized view for the logged-in user, showing:

- Individual performance metrics
- Active and completed conversations
- Channel-specific statistics
- Current workload
- Daily Statistics

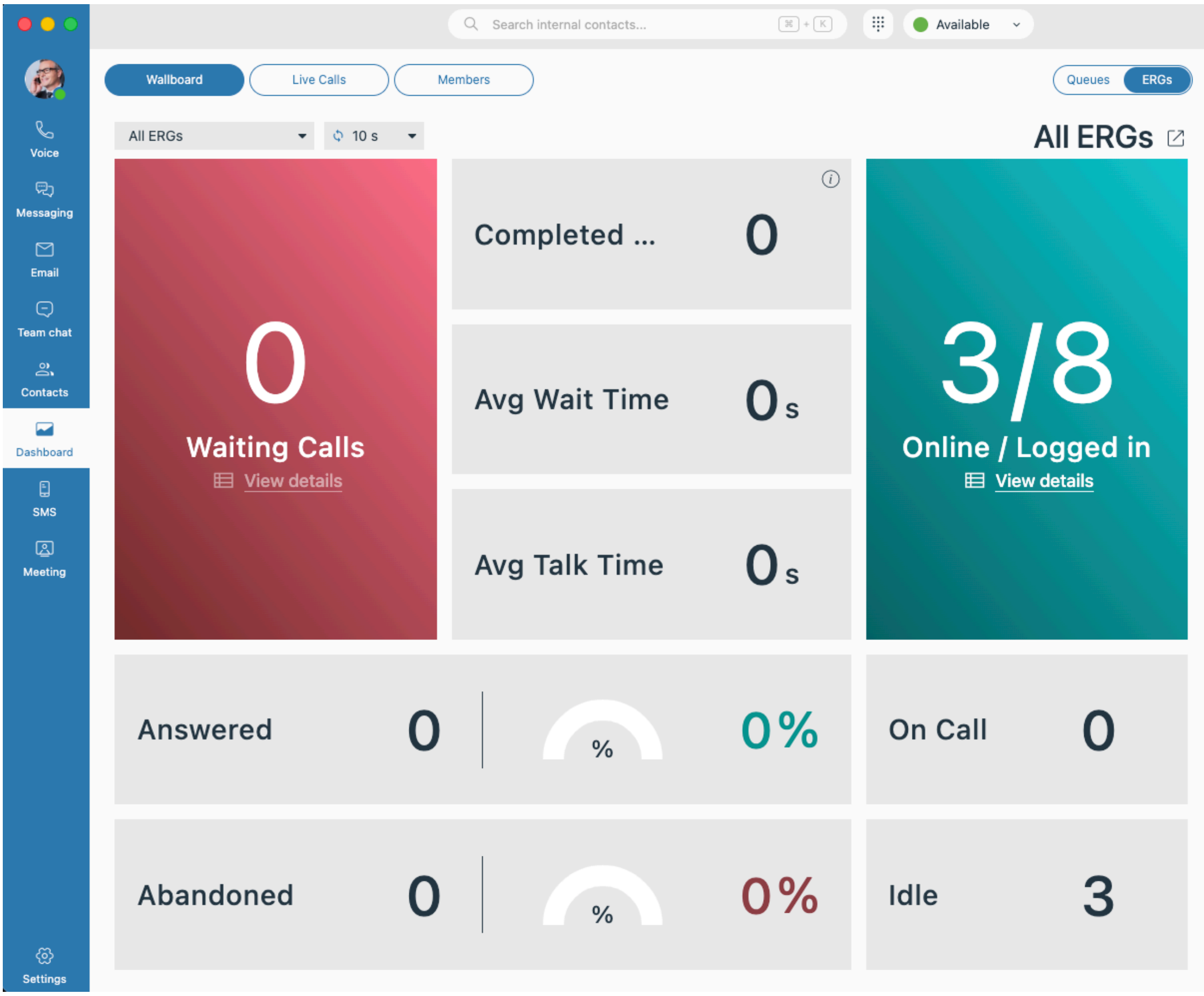
This tab helps agents track their own workload and performance.

Switching Between Queues and ERGs (Supervisor only)

Use the toggle in the top-right corner of the Dashboard to switch between:

- Queues view: Displays data related to queue-based conversations and agent activity.
- ERGs view: Shows the same dashboard structure, filtered to ERG-related data.

ERG Dashboard Overview (Supervisor only)



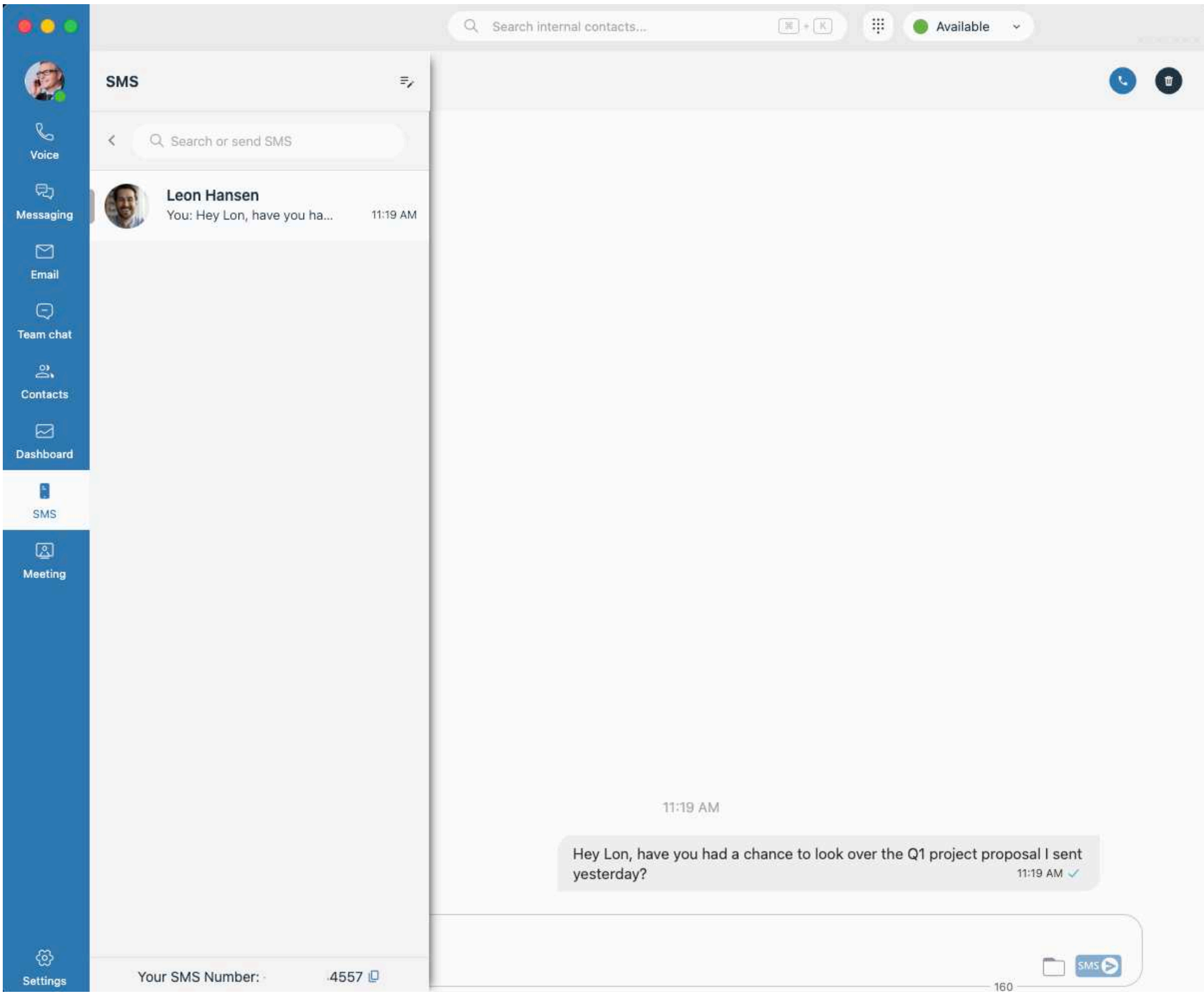
Note: The ERG Dashboard Overview is available only on Supervisor edition.

Use the following tabs to manage your view:

- Wallboard: View a high-level overview of call metrics including:
  - Online and logged in members
  - On call members, idle members
  - Calls waiting to be answered
  - Answered calls
  - Abandoned calls
  - Completed calls
  - Average waiting time
  - Average talk time
- Live Calls: Displays a list of active calls and calls waiting in the queue, including details such as the caller's name and number, ERG, and talk or waiting time.

- Members: Displays information about each member's phone status and state (for example: online, offline, logged in, logged out, on a call), as well as the number of answered and unanswered (missed) calls per member. If members belong to ERGs with the Static members option enabled, both phone status and state are shown. When this option is not enabled, only the phone status is displayed.

SMS



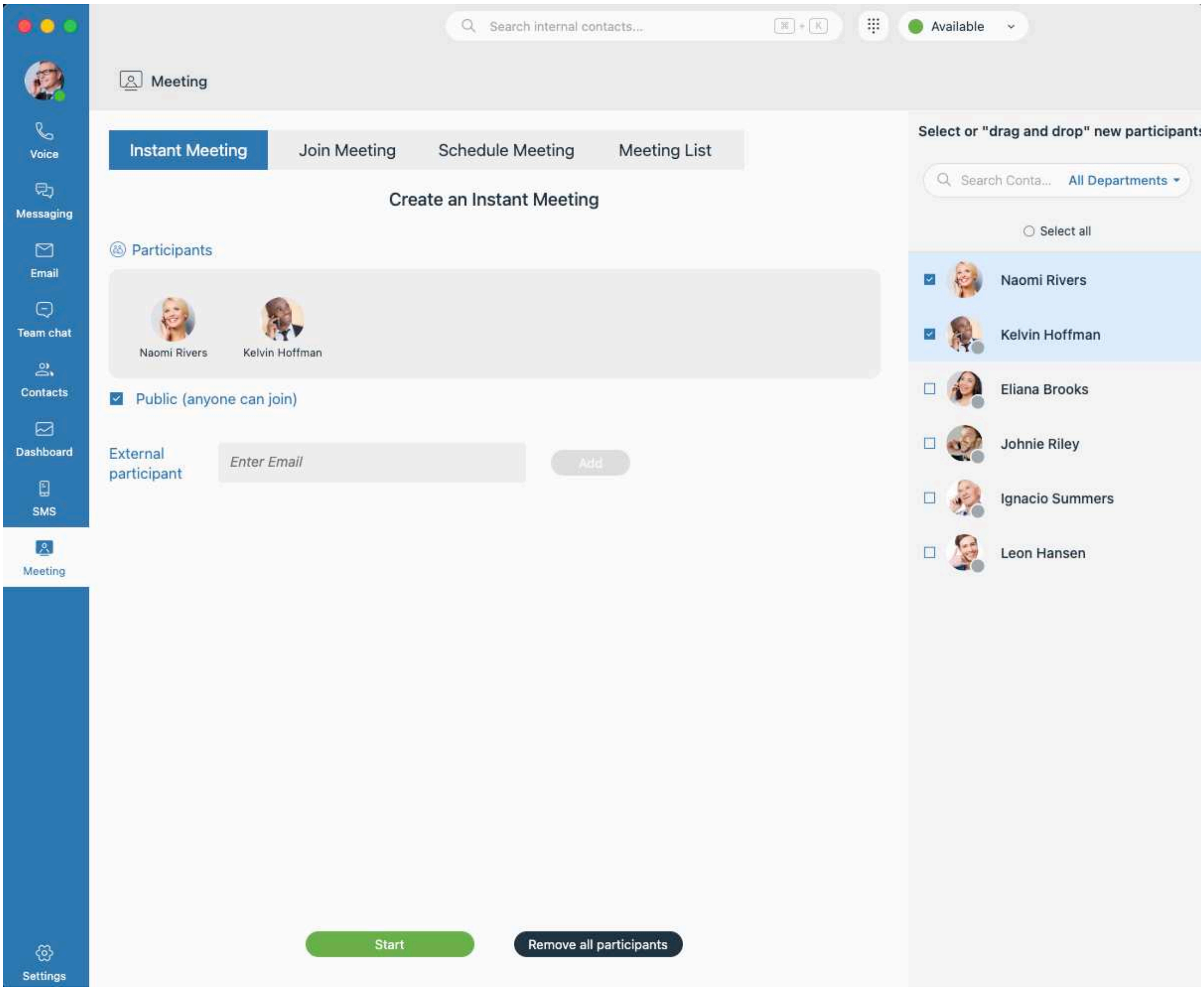
Engaging with the SMS messages

1. If you have an SMS number assigned to your login credentials, click on the "SMS" icon which will open an SMS dialog box showing you your SMS history across all participants, synced across all devices.

Meeting

Creating an Instant Meeting

1. Click the Meeting icon and select the Instant Meeting tab.
2. Drag and drop or select contacts, or manually enter an external participant's email and click Add.
3. Toggle Public (anyone can join) for open access, or leave it off for a private session, then click Start.



Joining an Existing Meeting

Click the Meeting icon, then choose Join Meeting (using a meeting number) or Meeting List (to pick from scheduled meetings).

Scheduling a Meeting

1. Select the Schedule Meeting tab and configure the meeting details: subject, start time, duration, time zone, description, visibility (public/private), recurrence, participants, and co-organizers.
2. Add participants by drag-and-drop or by entering an external email and clicking Add. Assign co-organizers the same way, or via the 3-dot menu next to a participant.
3. Click Schedule to notify all participants by email and add the meeting to their Meeting List.

Meeting List

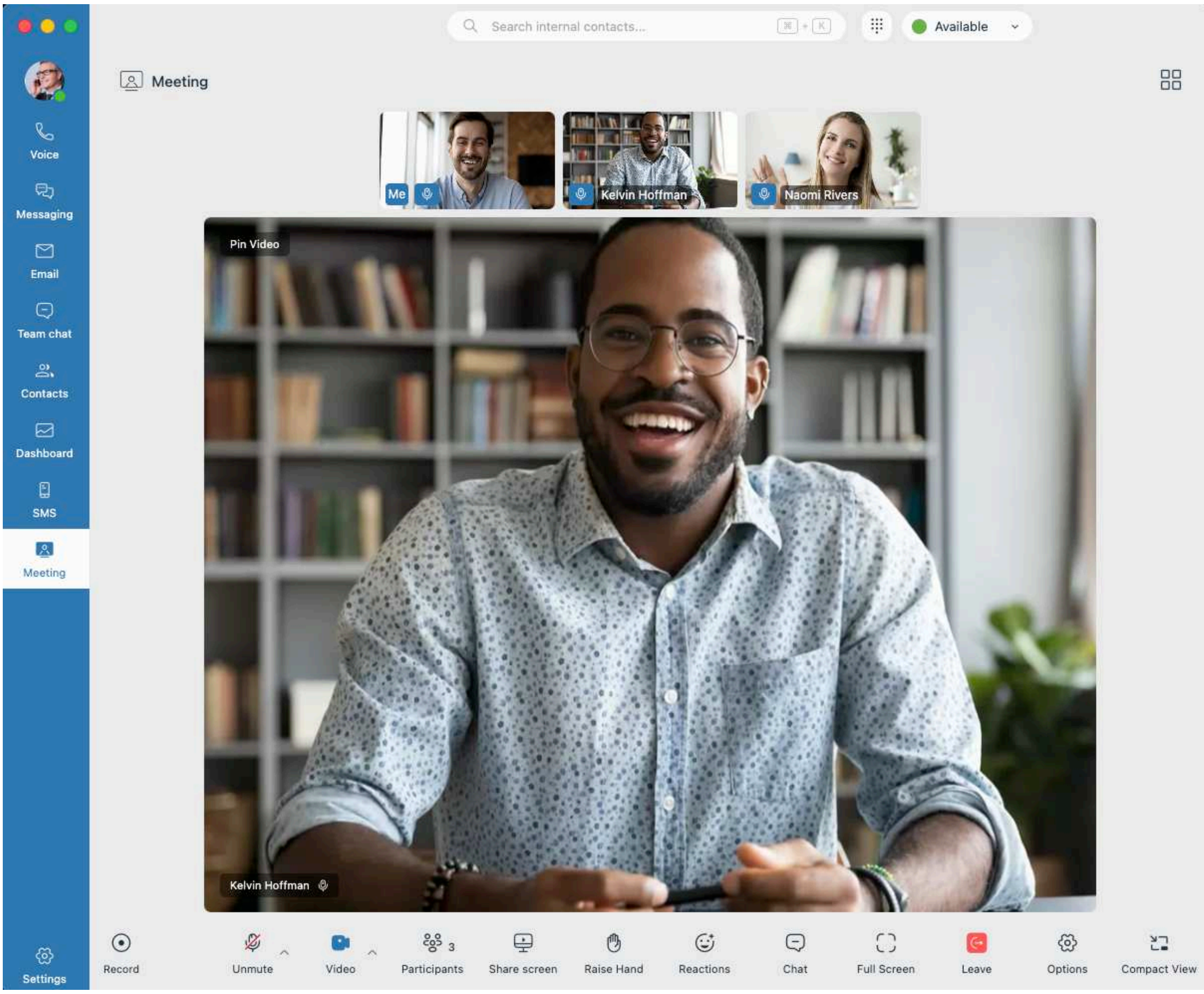
Click the Meeting icon and select Meeting List to:

- View upcoming meetings under the Scheduled sub-tab.
- Access past meetings and their Chat Records under the Previous sub-tab.
- Select a meeting to Start, Edit, or Delete it from the side panel (based on your permissions).

Using Meeting

Use the control bar at the bottom to manage your session:

- **Audio & Video:** Mute/unmute or toggle the camera; use the arrows beside each to switch devices mid-call.
- **Collaboration:** Share Screen, open in-meeting Chat, Record the session, Raise Hand, or send Reactions.
- **Participants:** Click Participants to manage attendees; right-click to Assign Co-Organizer, Reinvite, or Remove.
- **View & Layout:** Switch between Grid and Speaker view, double-click a participant to pin them, expand to Full Screen, or use Picture-in-Picture for multitasking.
- **Settings (gear icon):** Toggle incoming video, switch to a Public meeting mid-call, copy meeting info/links, and manage shortcuts or reactions.
- **Leave:** Click the red Leave button to exit or end the meeting.



Adjusting preferences

1. Click the “Settings” icon in the navigation bar to open the preferences screen.
2. Navigate through the many options to personalize your Communicator experience.

CRM Integrations

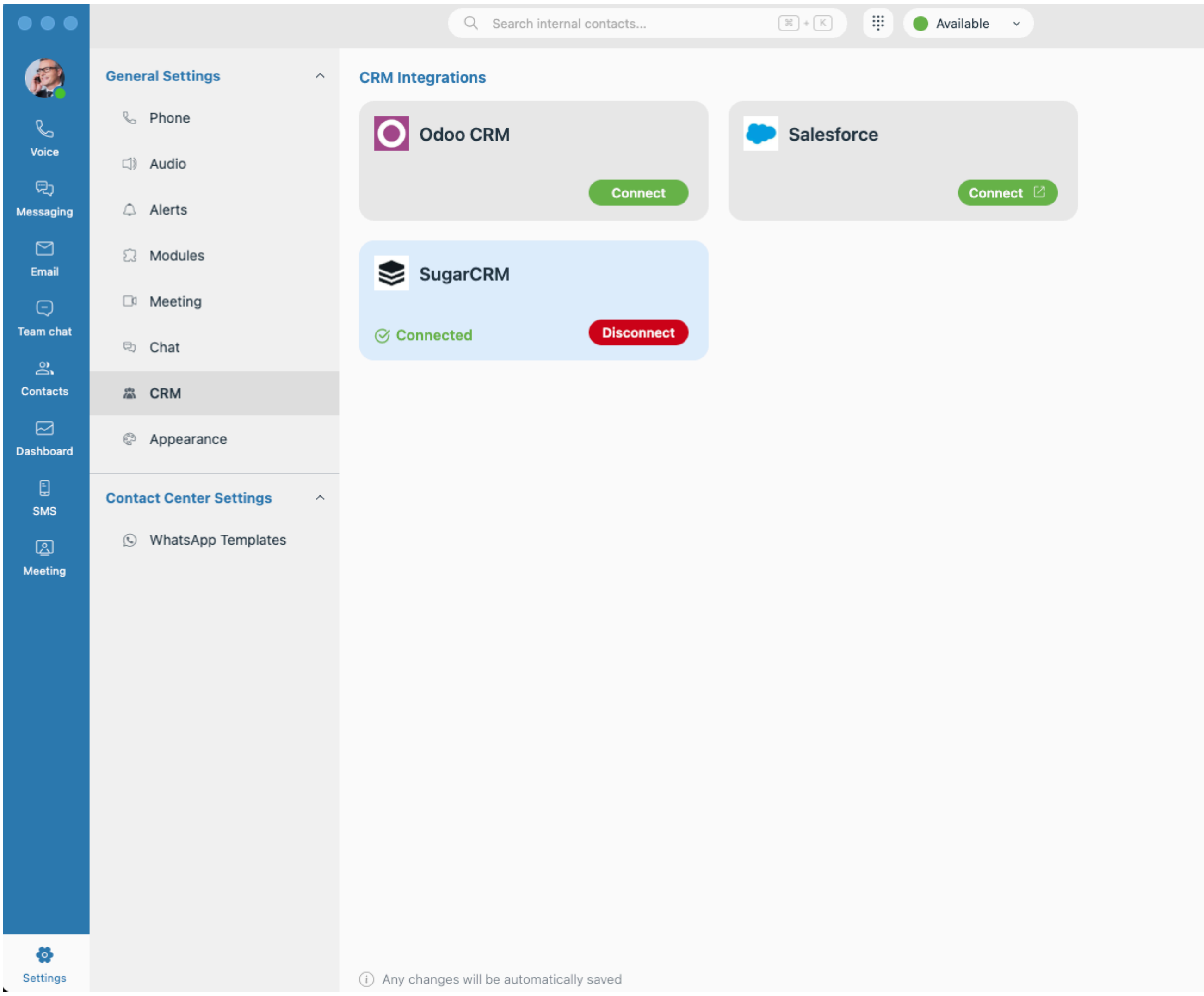
The CRM section within the application settings allows you to link your communication tools with external CRM systems to streamline your workflow.

1. Access CRM Settings: Navigate to the Settings menu and select the CRM section to view a list of all available CRM integrations.
2. View Connection Status: Each listed CRM system clearly displays its current status (e.g., Connected or Disconnected).
3. Connecting a CRM:
   - Click the Connect button next to your desired CRM to initiate the integration.

- An OAuth2 login window will appear in a new popup.
- Enter your CRM credentials and authorize the application.
- Once successful, the popup will close, and the status in the main settings view will update to Connected.

Note: Not all CRM systems support OAuth authentication; in some cases, the basic authentication method will be used instead.

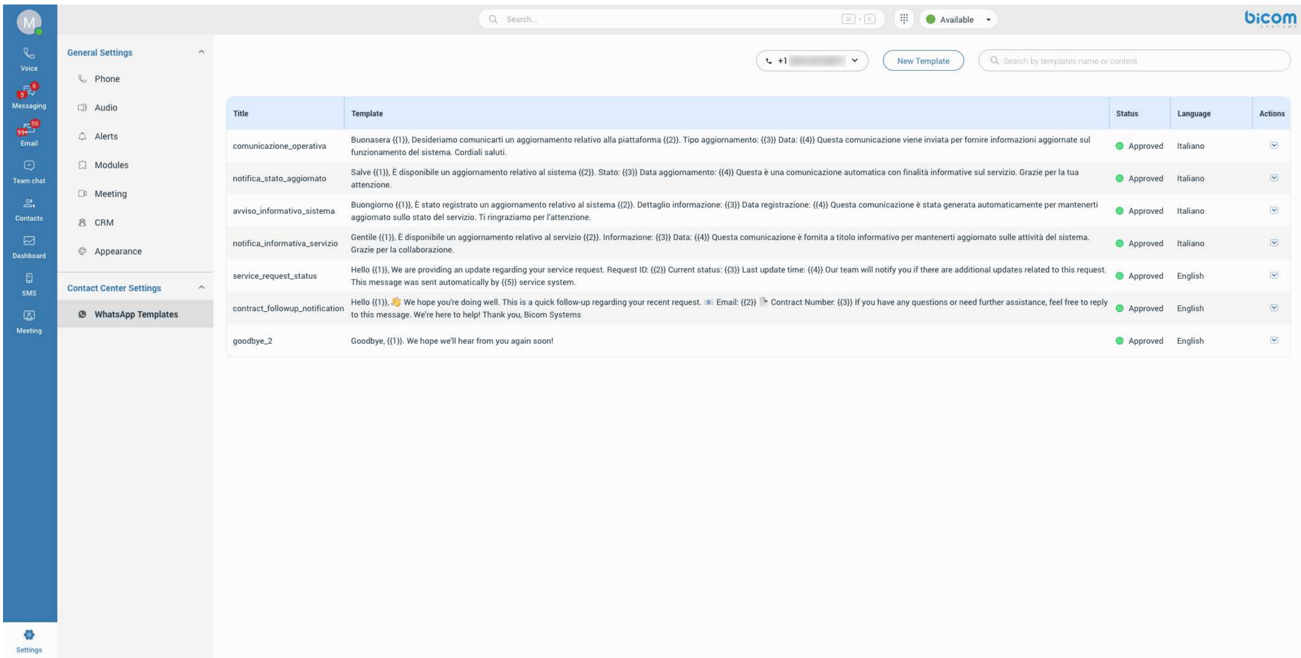
4. Disconnecting a CRM:
   - To remove an integration, click the Disconnect button or link next to the active CRM.
   - The connection will be broken instantly, and the Connected label will be removed.



Note: The connection process is optimized for both Web and Electron environments, ensuring that the status updates correctly regardless of which platform you are using.

WhatsApp Templates

The WhatsApp Templates section allows you to create, manage, and review pre-approved message templates used for customer communication.



Viewing Templates

1. Open the Templates section to view available WhatsApp templates.
2. Select a WhatsApp number from the dropdown to display its templates.
3. Use the search bar to filter templates by title, message, or language.

Each template shows:

- Title
- Message
- Status (Approved, Pending, Rejected, etc.)
- Language

Note: If no templates are available, a "No templates" message will be displayed.

Creating a Template

1. Click **New Template** (Supervisor only).
2. Enter the following:
    - **Title** (lowercase, numbers, underscores only, max 100 characters)
    - **Language**
    - **Message** (max 1,024 characters)

Note: The title must be in lowercase and cannot contain spaces.

3. Use placeholders for dynamic values:
    - Format: `{{1}}, {{2}}, {{3}}`
    - Must start from `{{1}}` and be sequential
4. Click **Preview** to review your template before submission.

Tip: Emojis and placeholders can be inserted directly into the message.

Submitting a Template

1. Provide example values for each placeholder.
2. Review the final preview.
3. Click **Save** to submit the template.

Note: All placeholder values must be filled before submission.

Template Actions

- **Preview** – View template content (available to all users)
- **Delete** – Remove template (Supervisor only)

Note: Deleted templates are removed from all endpoints and cannot be restored.

Draft Saving

- Your progress (title, message, placeholders) is saved automatically during creation

Drafts are cleared after:

- Successful submission
- Cancel action
- Logout

Logs and Diagnostics

The application includes a built-in log viewer to assist with troubleshooting and technical support.

Accessing the Log Viewer

1. Navigate to the **Help** menu in the application header.
2. Select the **Logs** option to open the integrated Log Viewer.

Log Viewer Features

- **Category Filtering**: Use the category dropdown to isolate specific types of events.
- **Search**: Use the search bar to find specific keywords or error codes within the log entries.
- **Log Management**: You can manually **Clear** the current view, **Copy** log content to your clipboard, or **Download** the logs as a file for external review.
- **Console Logs**: Note that `console.logs` are disabled in the browser dev tools on production and test servers; all activity must be viewed through the internal log viewer.

Tip: For more detailed troubleshooting, you can enable Verbose mode.