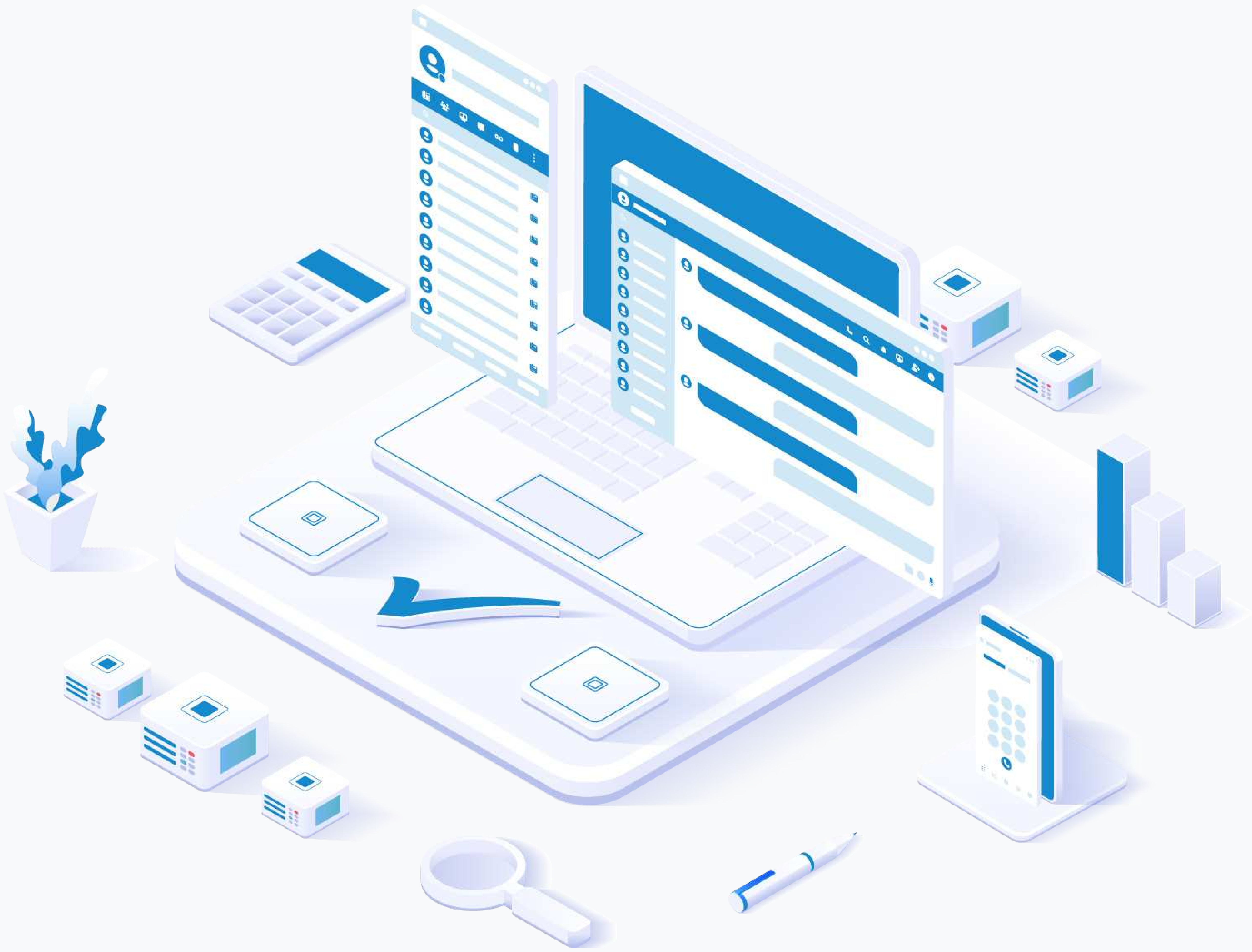


BUSINESS EDITION

# 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

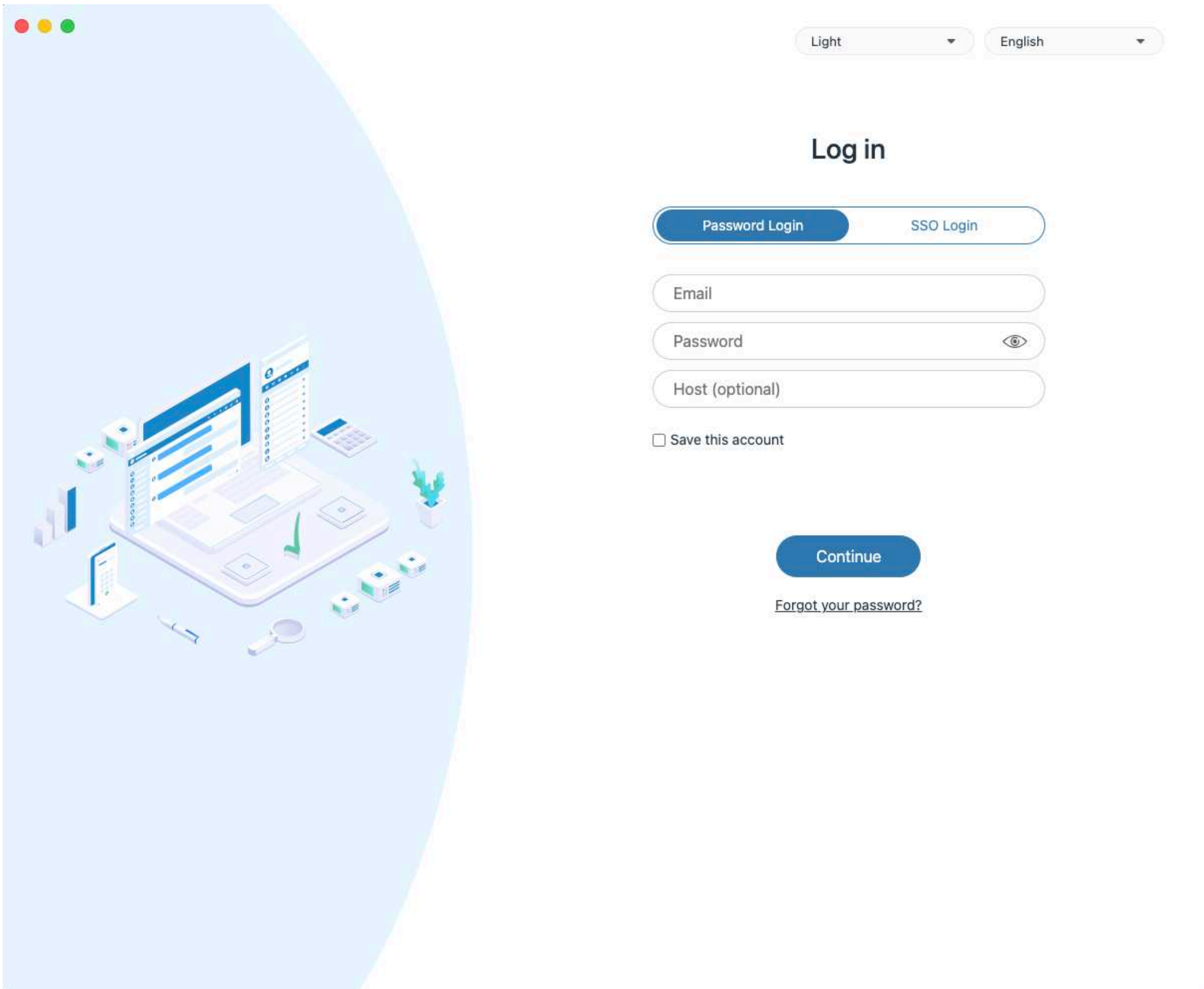
1. Open the Communicator Next application and navigate to the login page. You will see two login options at the top:
   - Password Login – Enter your email and password credentials
   - SSO Login – Use your organization's single sign-on authentication

**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)

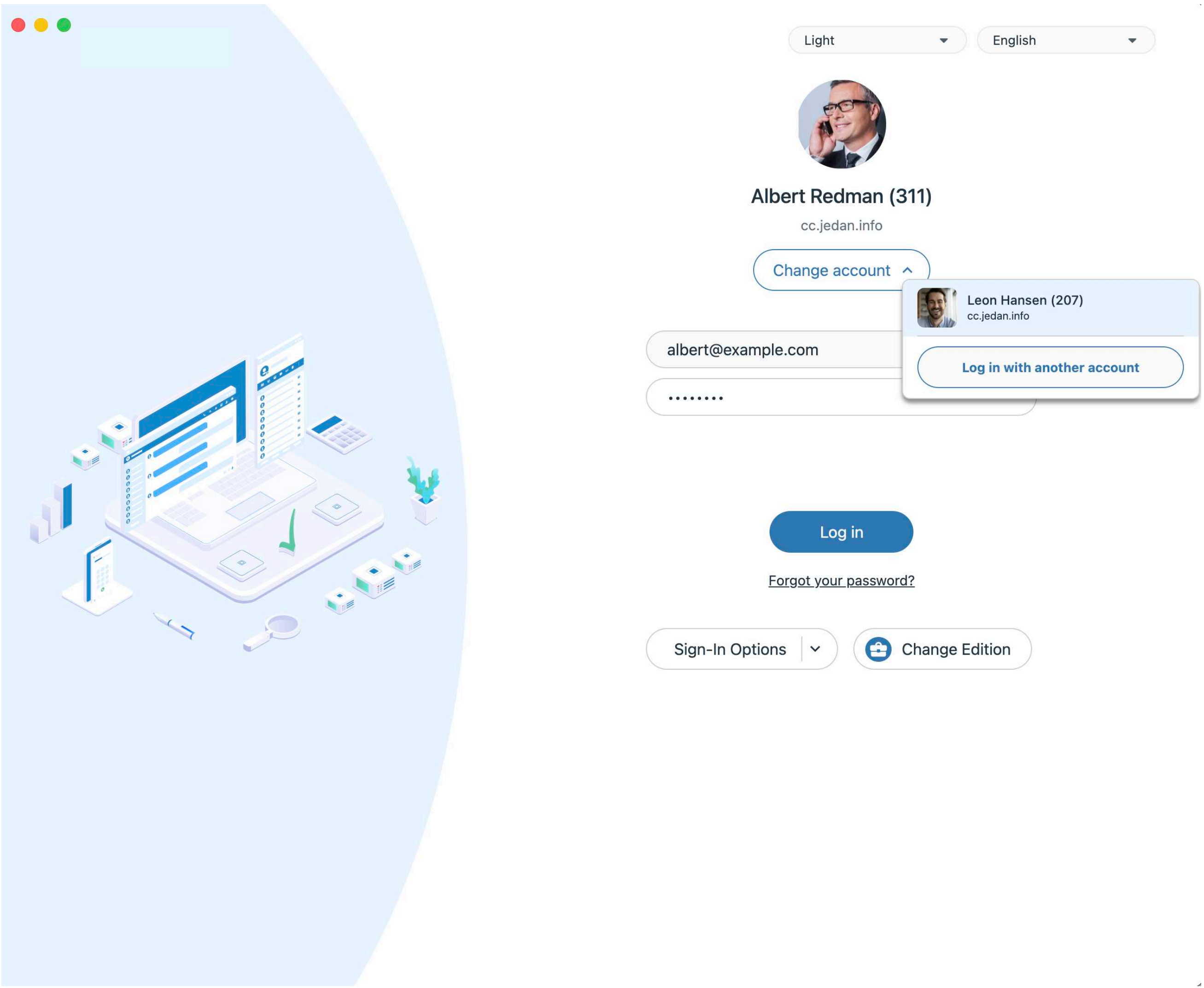
**Tip: If you've forgotten your password, click "Forgot your password?" to reset it.**

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?

## 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.

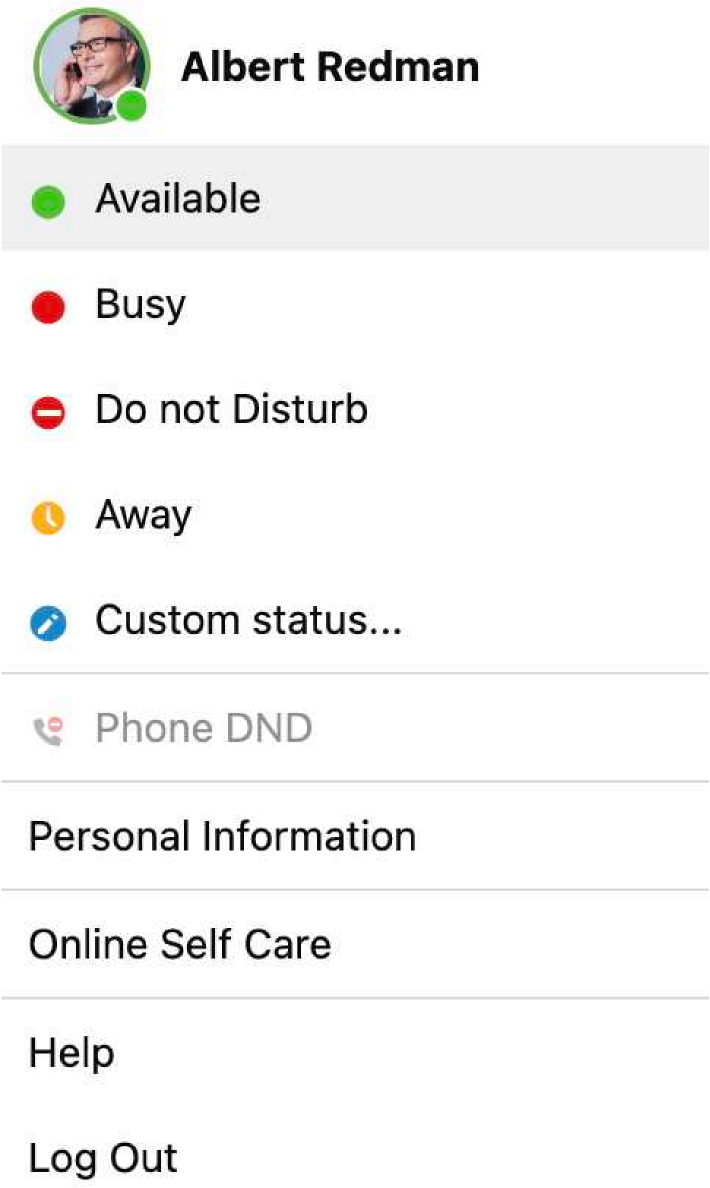


## Two Factor Authentication (2FA)

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

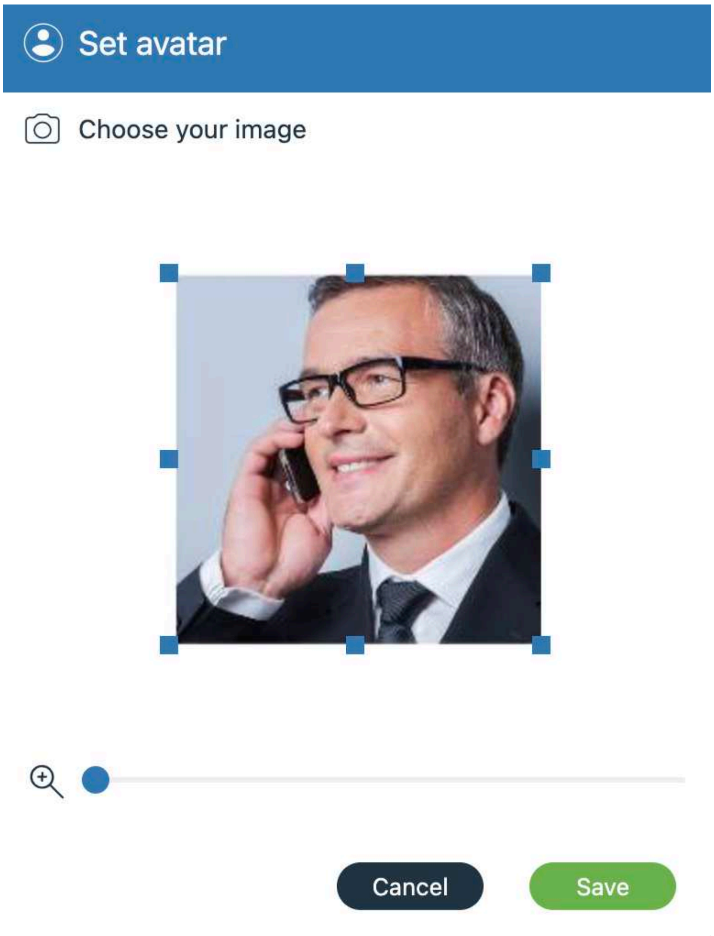
**Note: The 2FA feature cannot be combined with SSO.**

# 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 upload a new avatar, reset to the default one, or cancel the action.




## 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.

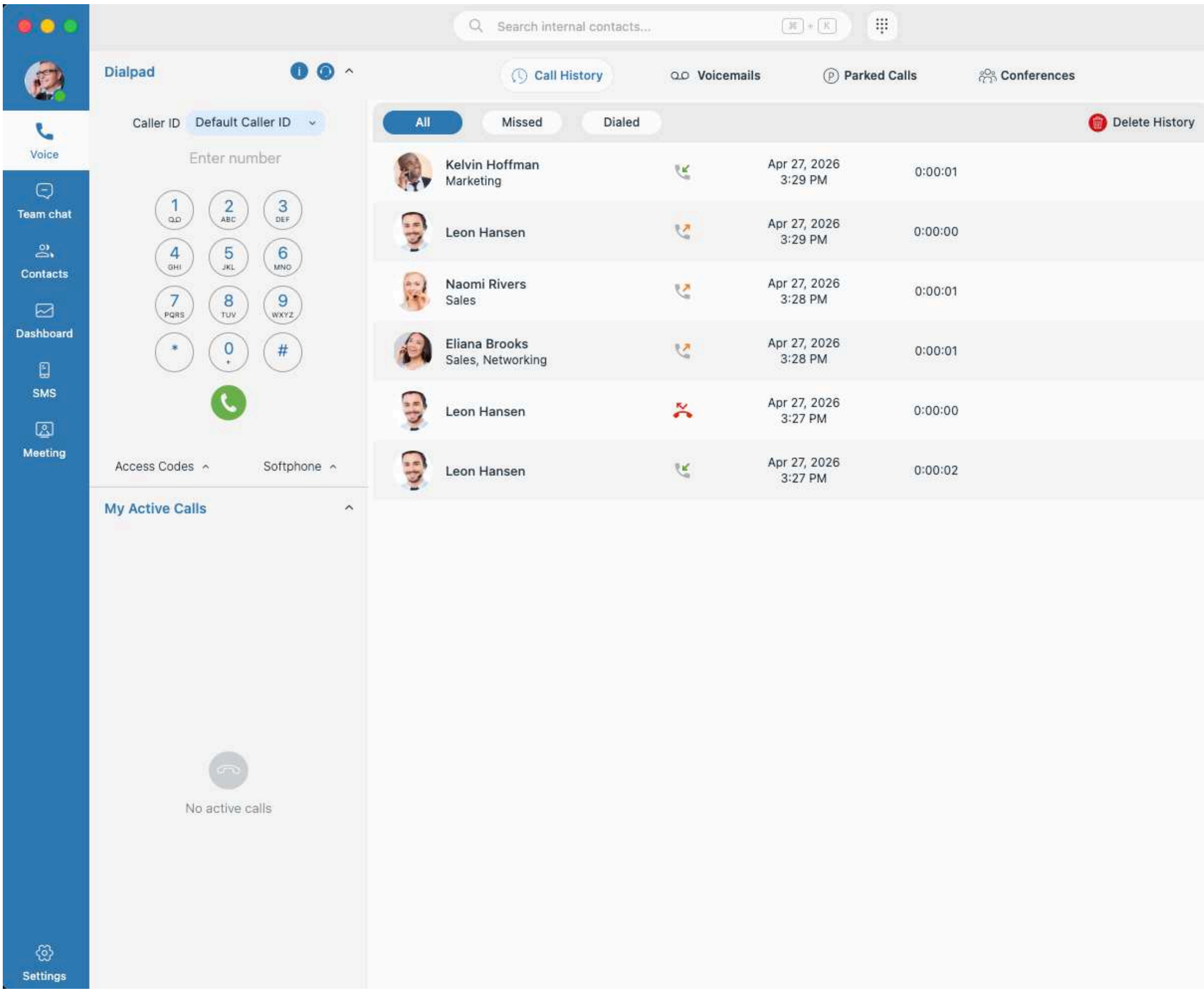
## Phone DND

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

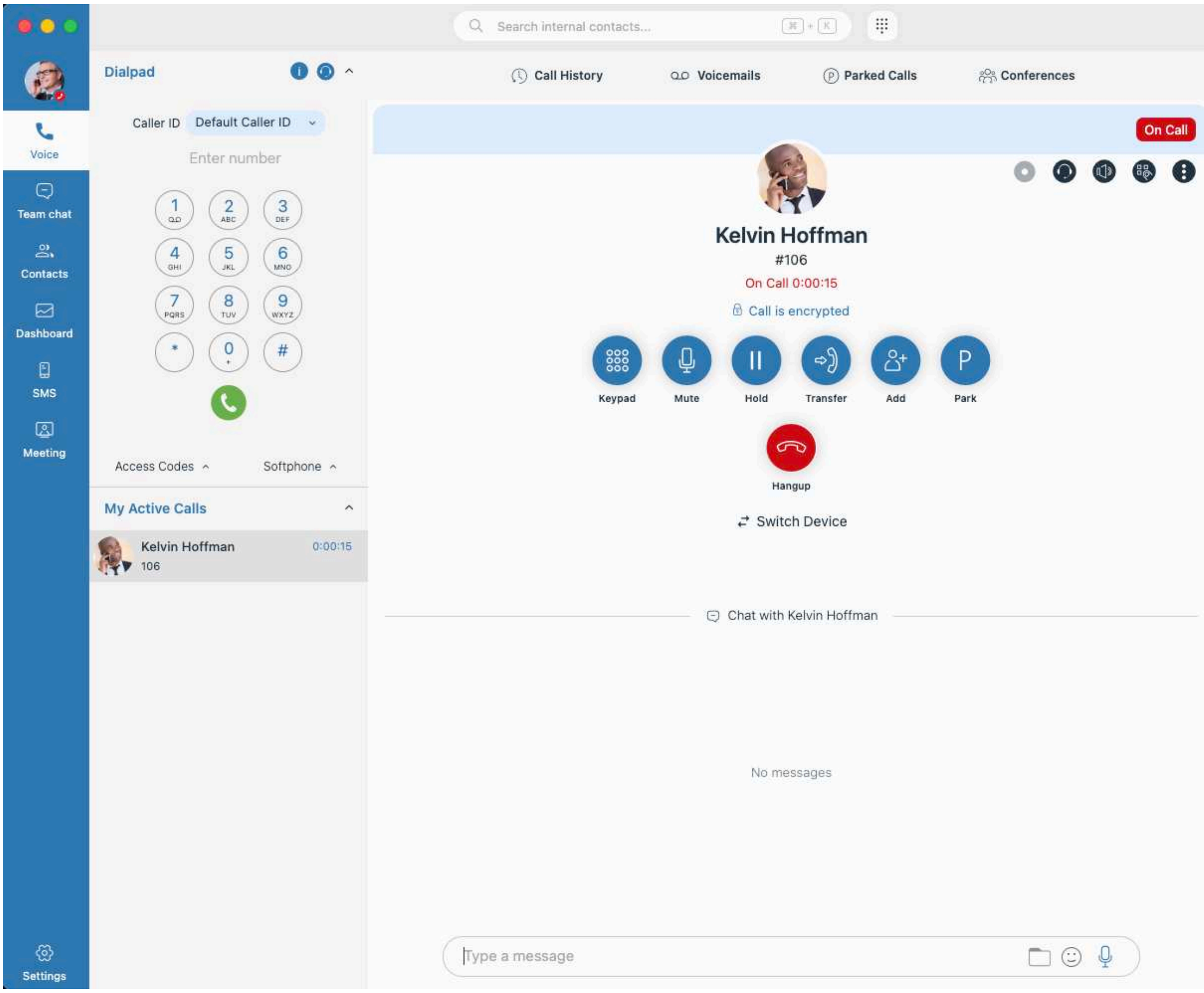
1. Selecting the Online Self Care option will automatically open a new tab in your web browser. To access the portal, you will be required to enter your credentials to log in securely.

# 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.**

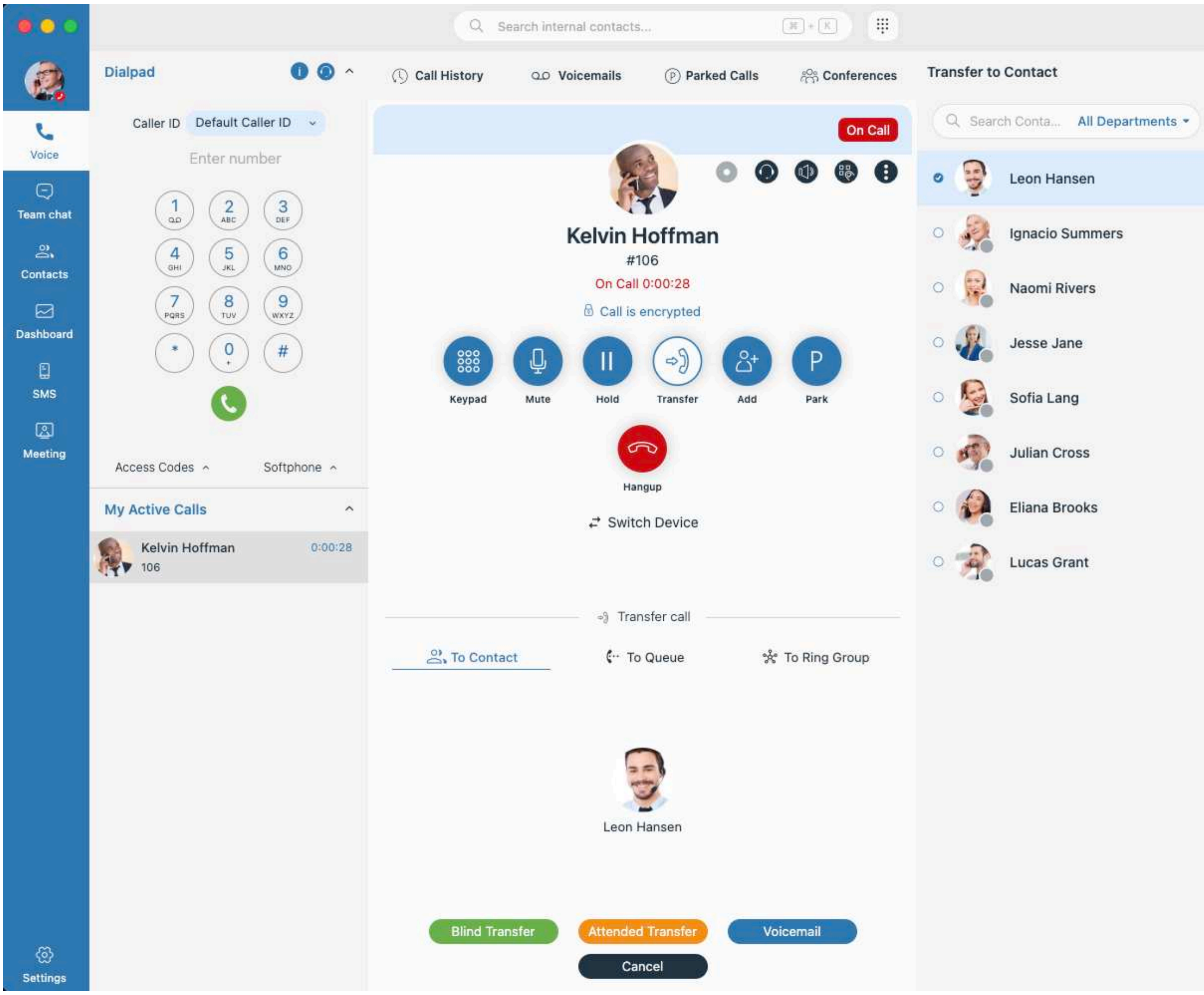
# Adding People To An Existing Call

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:
    - A contact or phone number 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

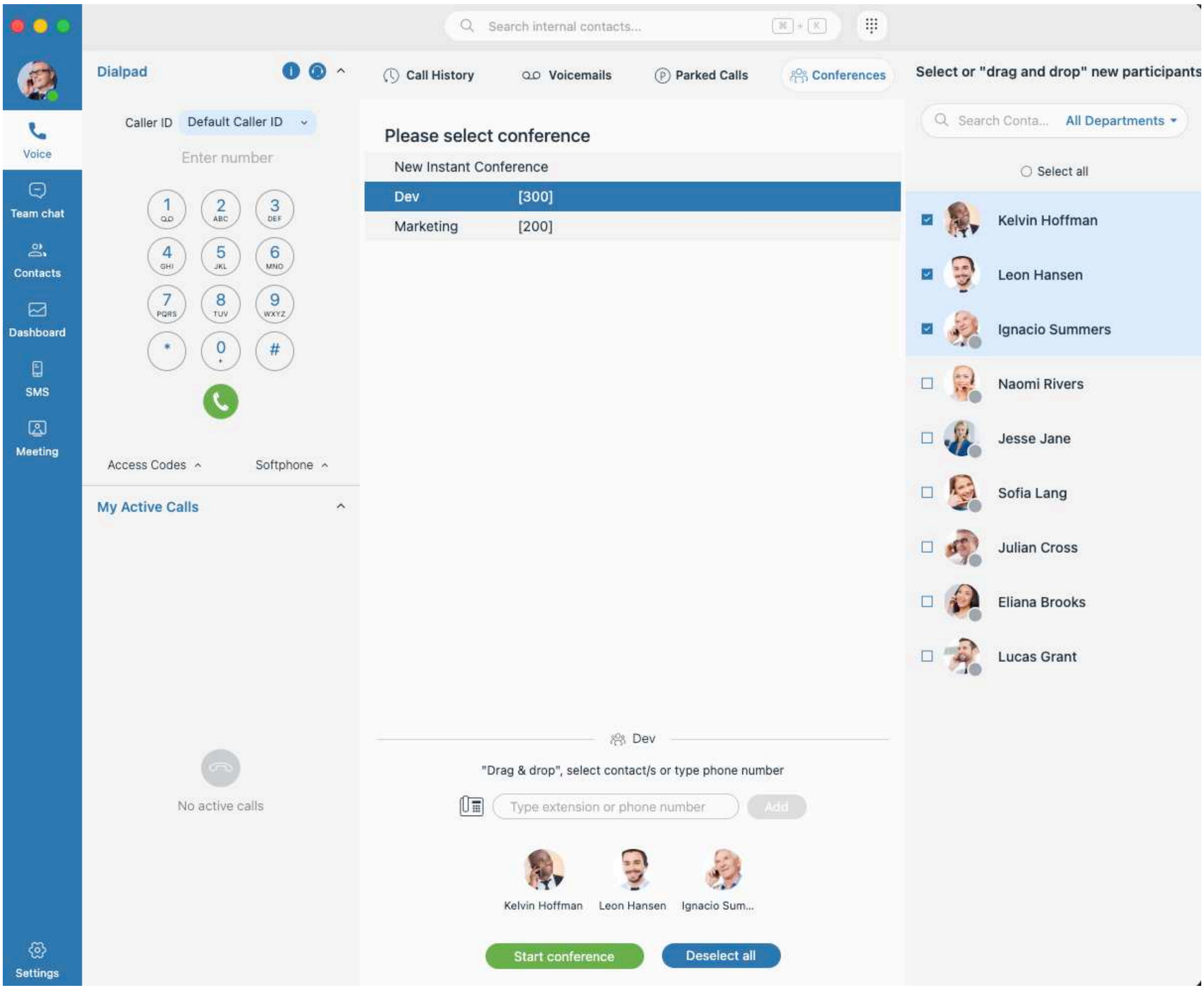
An alternate method of call transfer is to click on the icon of the user currently in the call and drag them over to the person you want to transfer them to. There, an overlay will appear with the “Blind” and “Attended” options where you can drop them over your desired transfer method.

## 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 the Conferences button to open the Conferences screen.
2. Choose either “New Instant Conference” or select 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

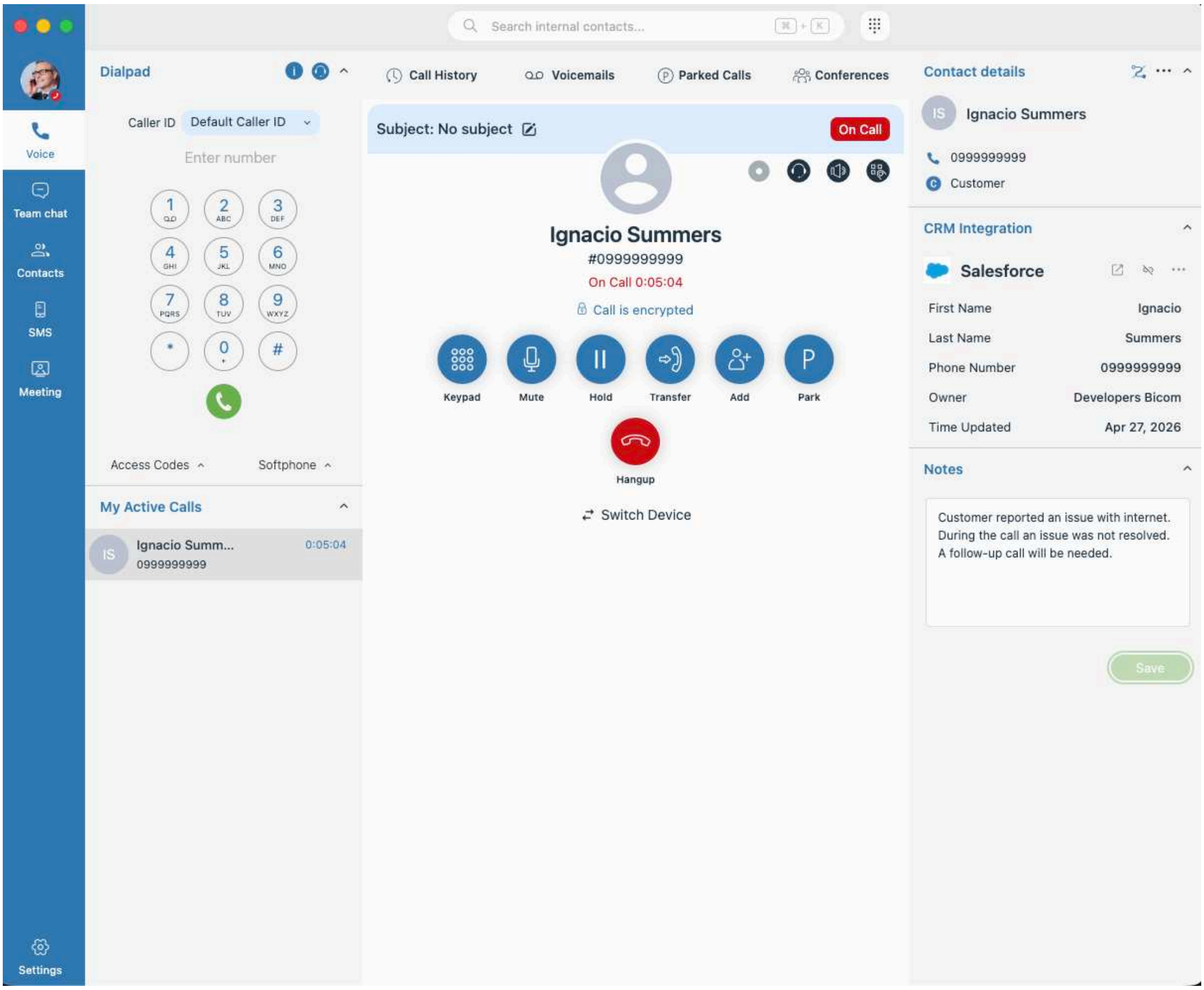
1. During an active call, click the Park button to open a dropdown menu and select a specific parking lot to place the call in.
2. Once a call is parked, anyone can pick it up by pressing the Pick Call button next to the parked call or dialing the number of the parked extension.

## 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 for external calls

The Contact Card is a comprehensive side panel that appears during calls with external contacts, providing a unified view of customer identity 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 call, the new contact is automatically linked to that call. Contact visibility (Global, Department, or Private) can be set at creation or edit time.
- **Link/Unlink:** Use the link icon to associate a call 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.

## CRM Widget for external calls

The CRM Widget provides a centralized view of contact data retrieved from your active CRM integrations during external calls. 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:

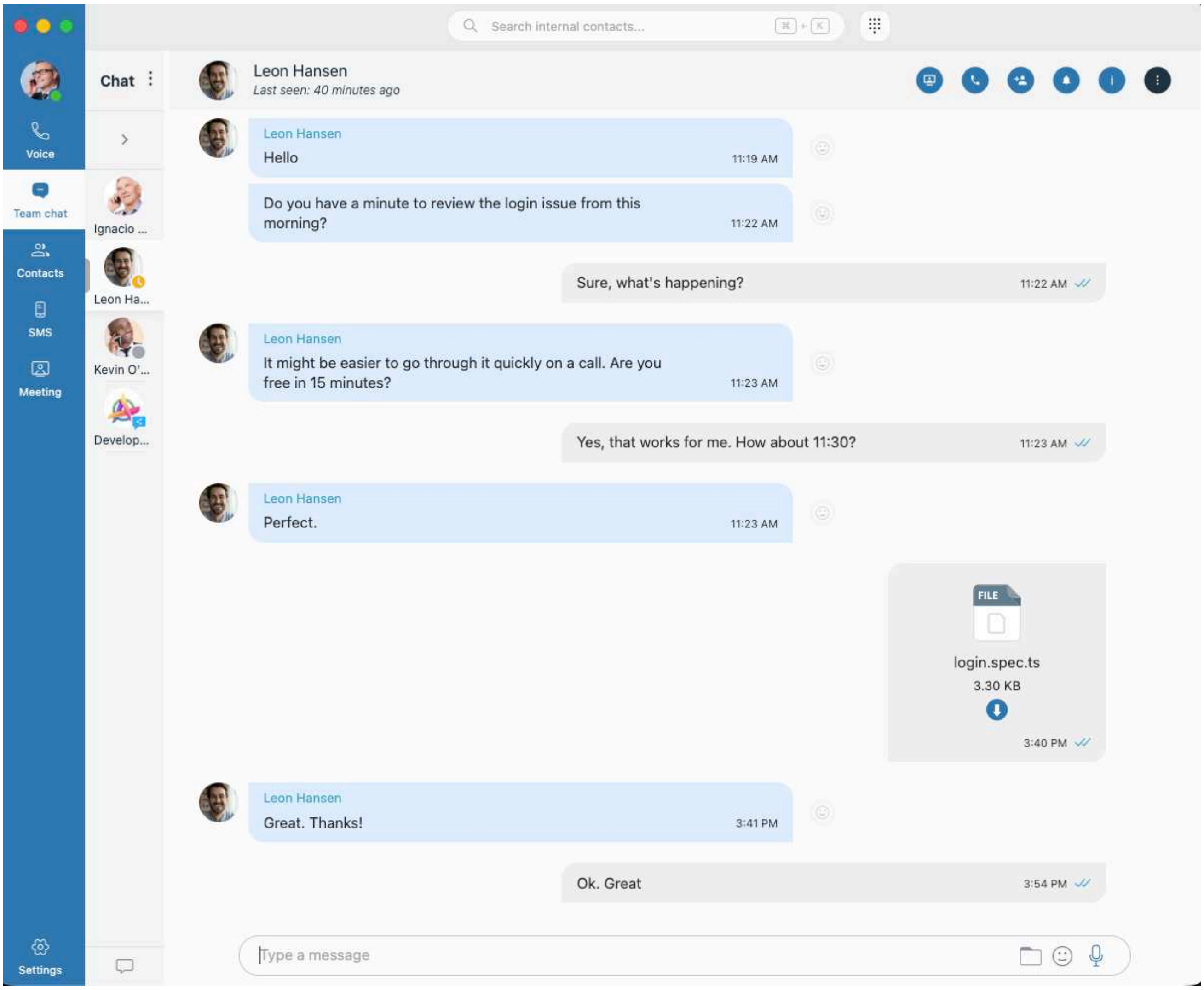
- Linking a Record: This "connects" an active call to a specific CRM record (e.g., a Contact or Lead). Once linked, the widget will automatically display that contact's comprehensive information whenever you engage with them.
- Suggested Matches: The widget automatically displays suggested records. If 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.**

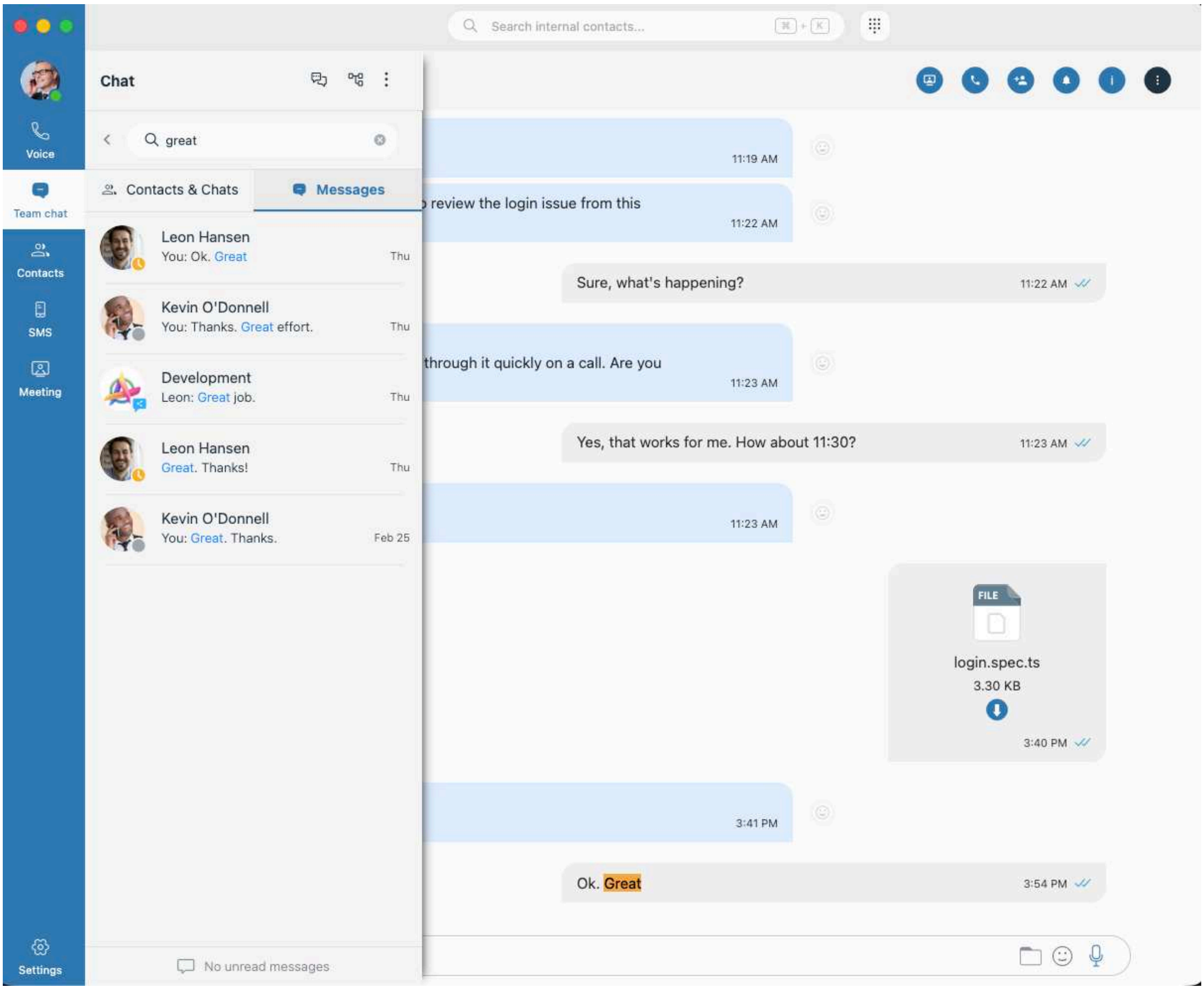
# Team Chat

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 single participant, you can notify the participant that you require their presence by clicking on the “Ask for attention” icon, which will send a push notification to them.
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 the 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’re too busy otherwise, 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.
12. Right-click on a message to open the message context menu, which provides quick actions for managing and interacting with individual messages.
    - Reply

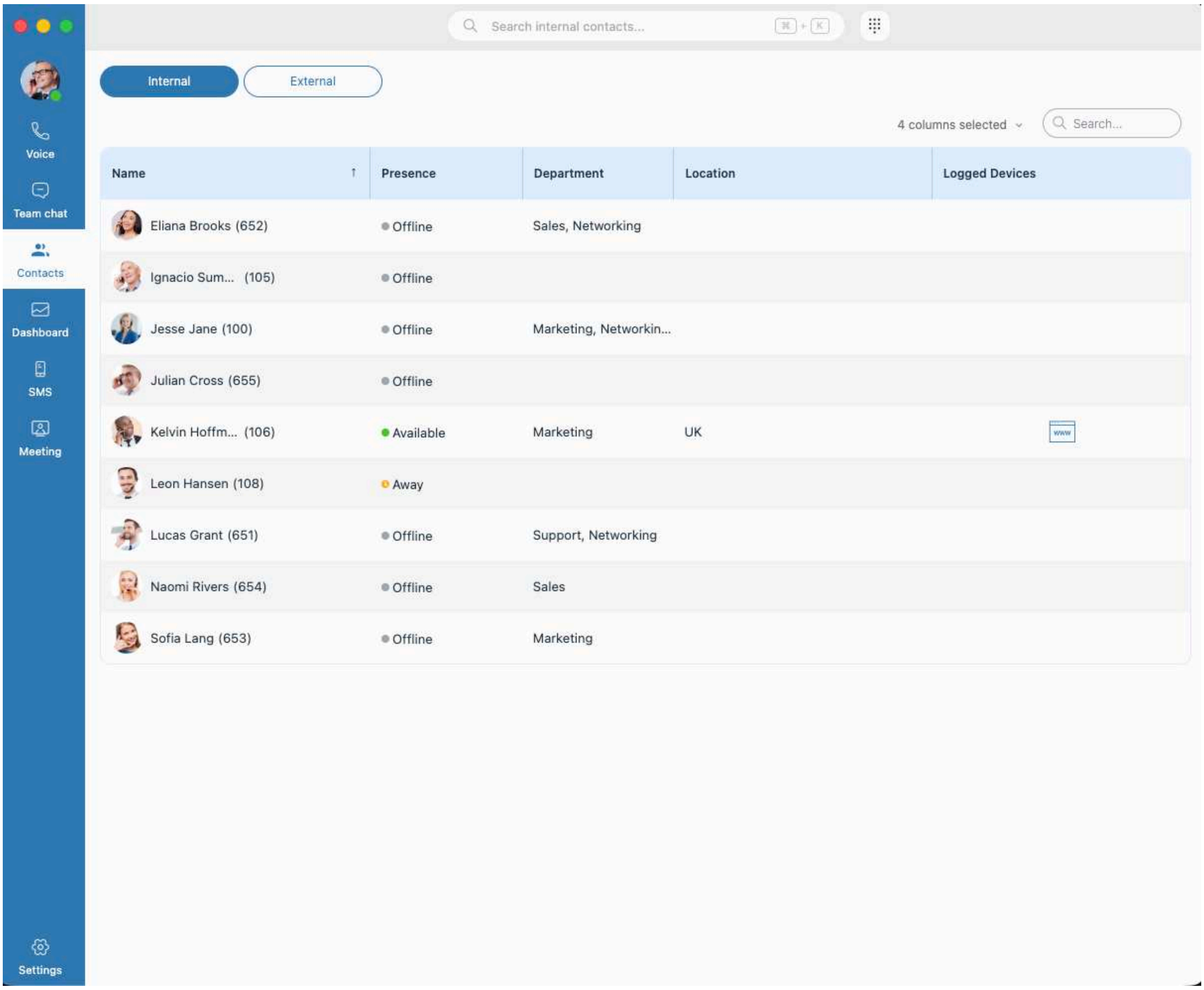
- Create thread (group chats only)
- Copy
- Show plain text
- Forward
- Edit (my messages only)
- Pin
- Info (group chats only)
- Delete

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

# Contacts

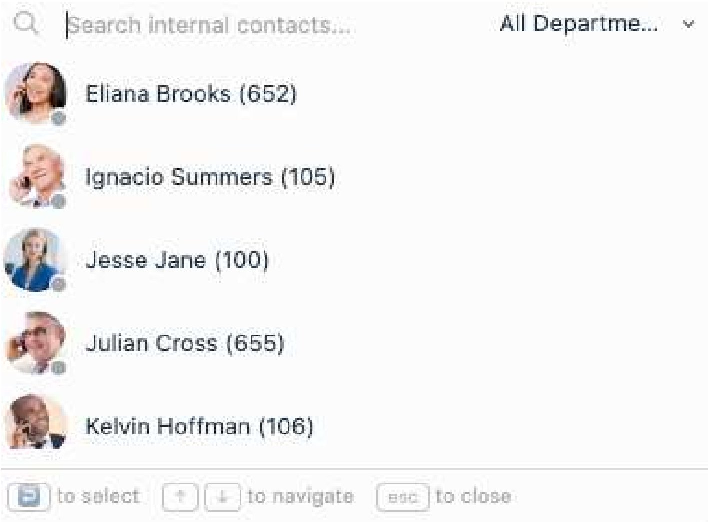
1. Click the Contacts icon in the main navigation bar to view your internal and external contact lists.
2. Switch between the Internal and External tabs to view different directories.
3. Customize View: Use the column selector to choose which information is displayed.

# Internal Contact Management

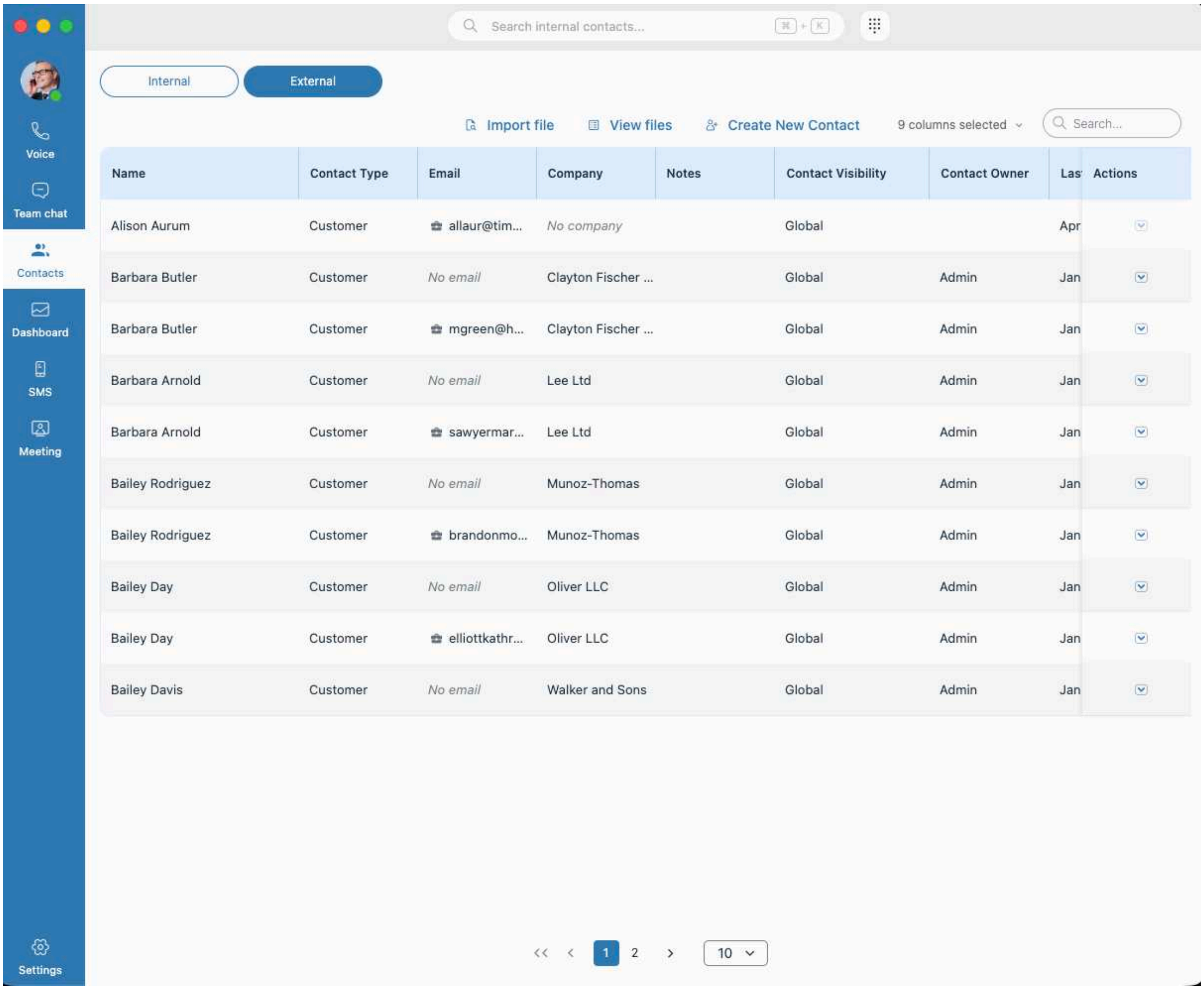



1. Use the Search bar to find specific contacts by name, email, department, title or location.
2. Check a contact's Presence status (e.g., Online, Offline, Busy) directly in the list to see their current availability.
3. Hover over any internal contact to reveal quick-action icons:
   - Call: Initiate 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.**

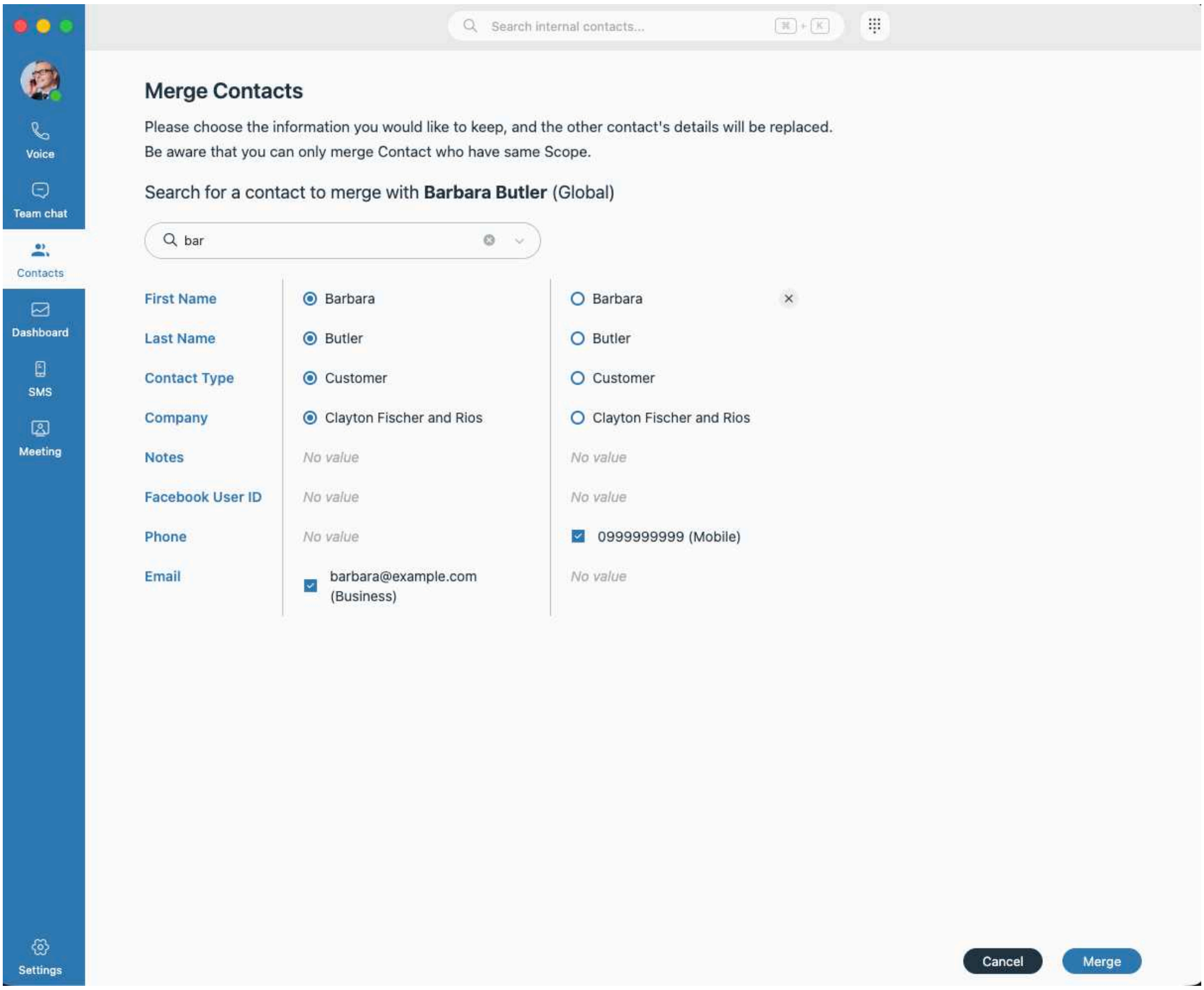


## External Contact Management




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



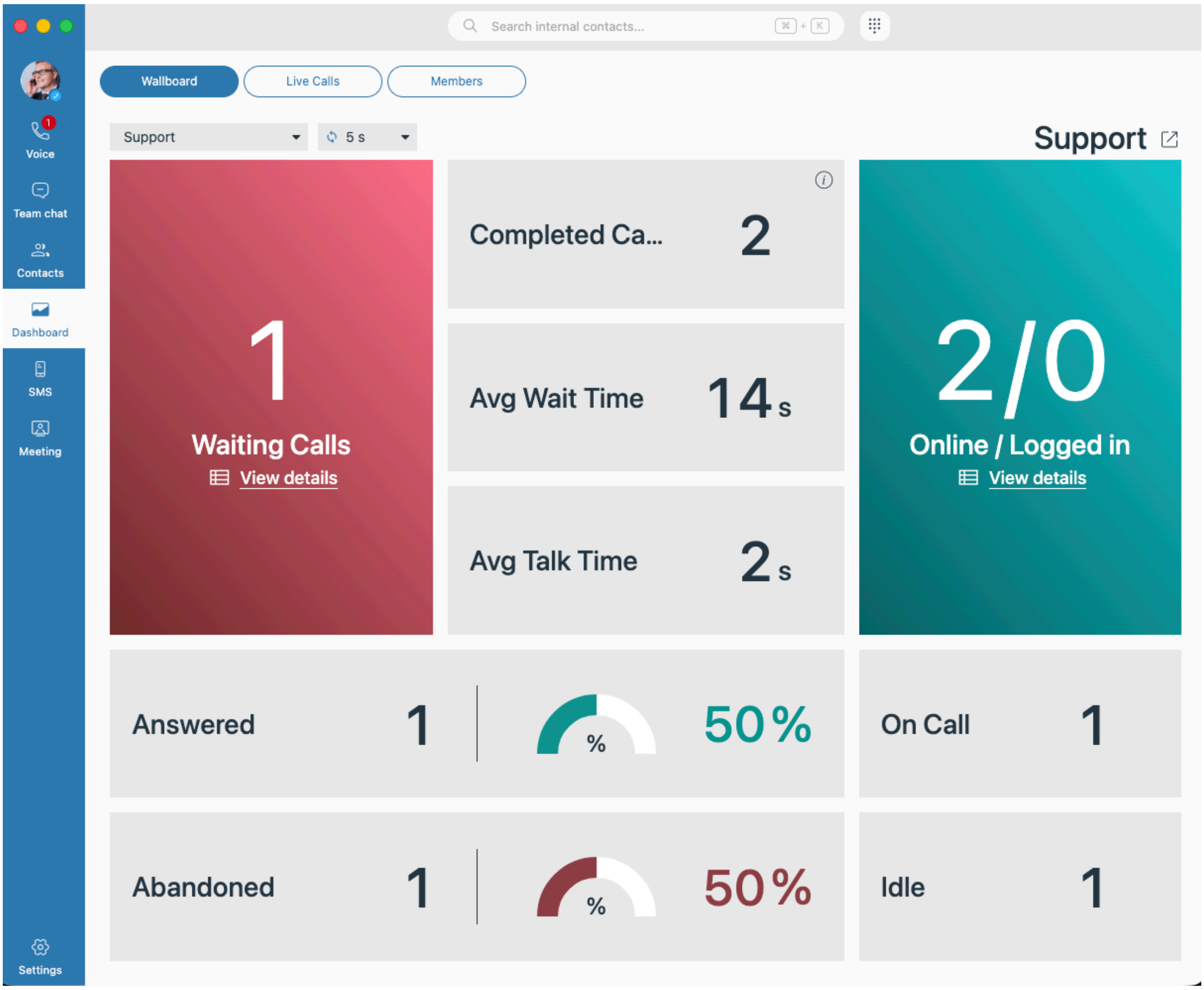

**Note: Only contacts with the same contact visibility can be merged.**

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).

# Dashboards

**Note: The Dashboard tab for Business Edition is available only on multitenant systems if the *Show ERG Dashboards* setting is enabled on the extension.**




1. Click the Dashboard icon in the main navigation bar to monitor call activity, key metrics and member engagement for your ERGs.
2. Navigation Tabs: Use the following tabs to manage your view:
   - Wallboard: View a high-level overview of call metrics such as:
     - 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)

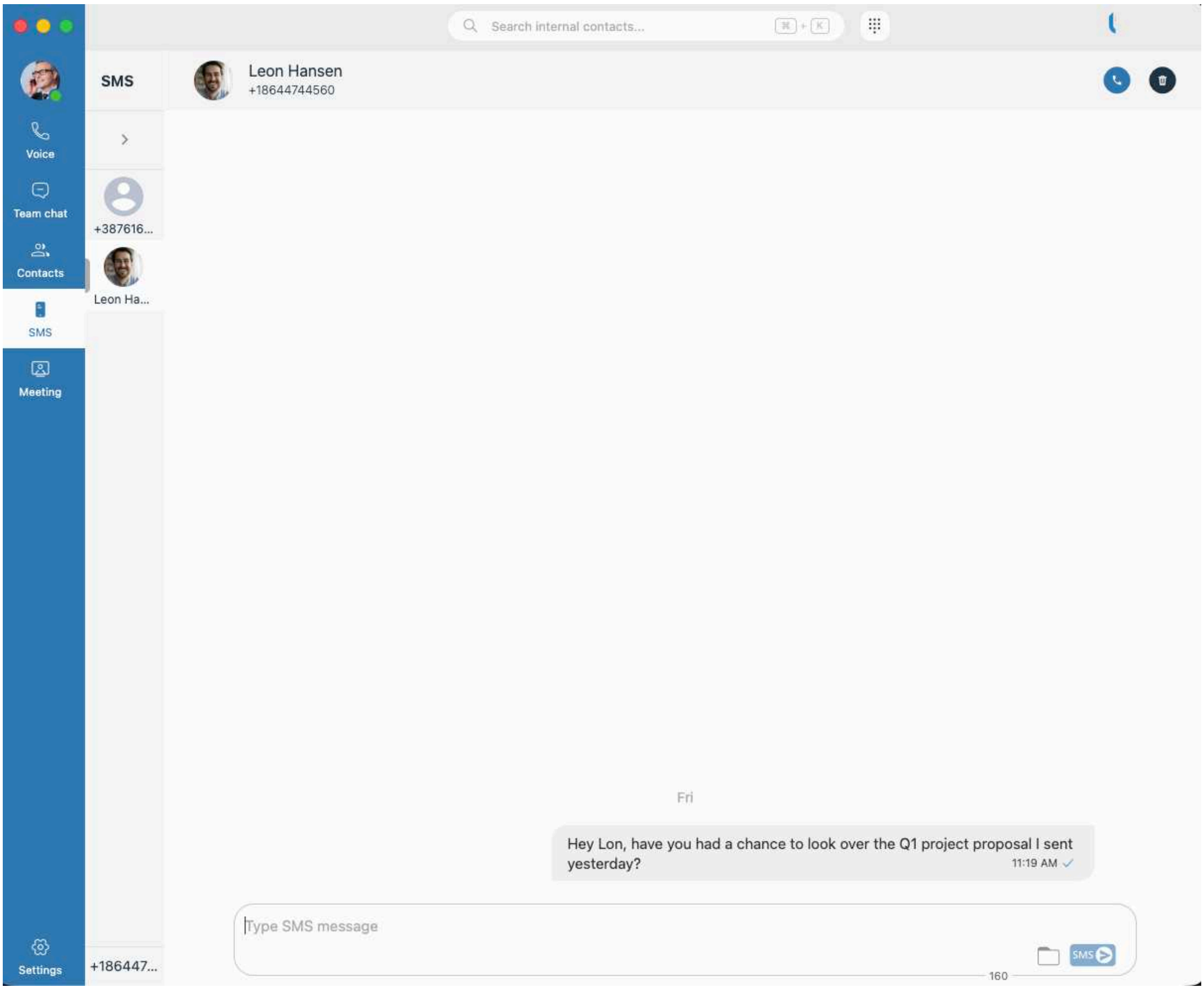
calls per member. If members belong to ERGs with the Static members option enabled, both phone status and state are shown. When this option is not enabled, only the phone status is displayed.

3. Detach Windows: Click the Detach icon (pop-out) on any tab to open it in a standalone window. You may have a maximum of three detached windows open simultaneously (one for each tab). Detached windows will automatically refresh if new filters are applied in the main application and the detach button is clicked again. Clicking View Details within a detached window will bring the main application into focus and navigate to the relevant tab.

**Tip: Detached windows can be displayed on a large screen or TV for easier monitoring.**

4. Filtering: Use the dropdown menus to filter data by specific ERGs and set the Refresh rate (e.g., 10s) to ensure the data remains current.

# SMS



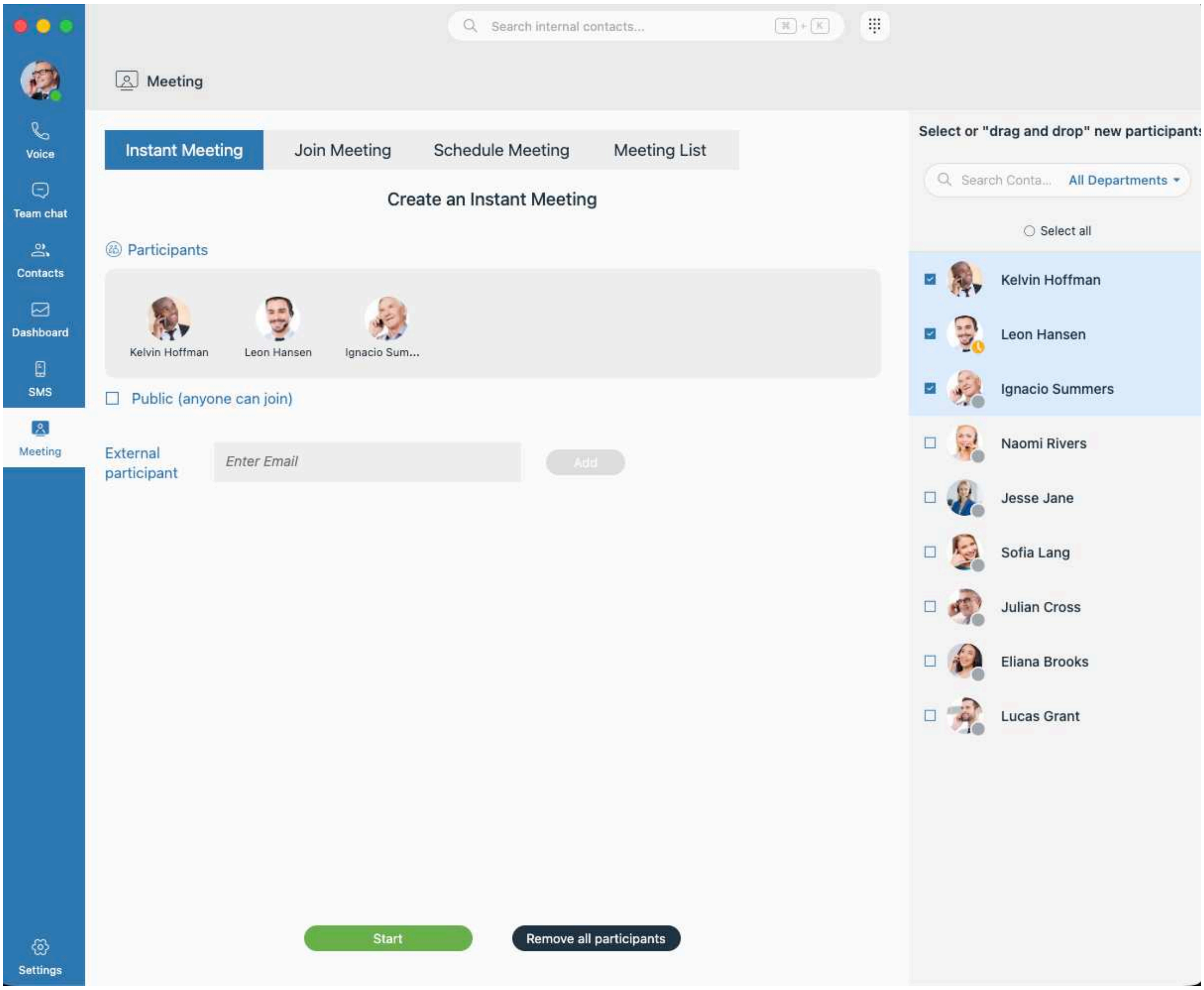
## Engaging with the SMS messages

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

# Meeting

## Creating an Instant Meeting

1. Click on the Meeting icon and select the Instant Meeting tab.
2. Drag and drop or select contacts from your list, or manually enter an external participant’s email in the field and click Add.
3. Select the Public (anyone can join) radio button to allow open access, or leave it unchecked for a private session.
4. Click Start.

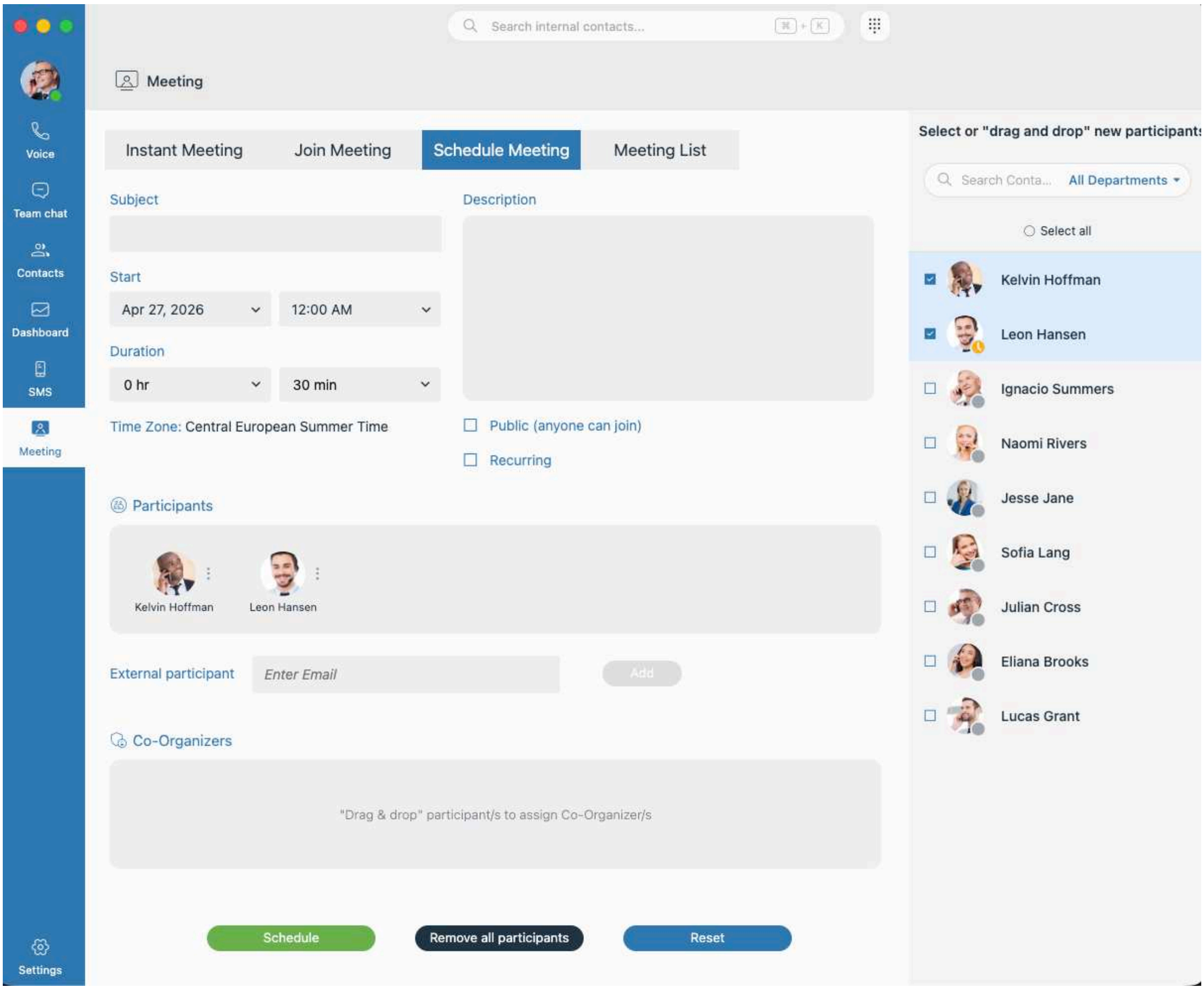


## Joining an Existing Meeting

1. Click the Meeting icon.
2. Choose your method: Join Meeting (using a meeting number) or Meeting List (to select from scheduled meetings).

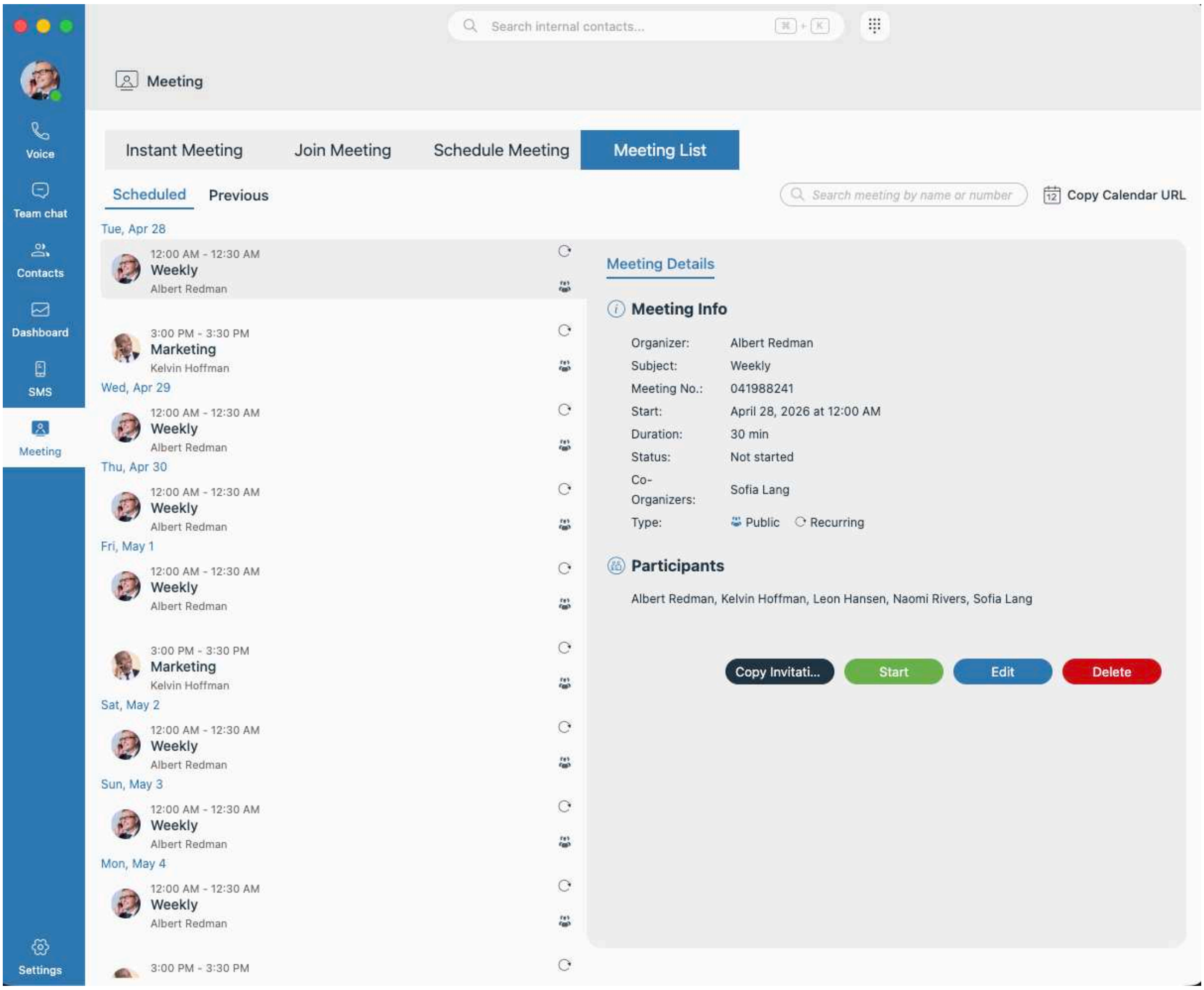
## Scheduling a Meeting

1. Select the Schedule Meeting tab.
2. Adjust your meeting preferences from the options available:
    - Meeting subject
    - Meeting start time
    - Meeting duration
    - Time zone adjustment
    - Meeting description
    - Public or private meeting
    - One-time or recurring meeting
    - Meeting participants
    - Meeting co-organizers
3. Drag and drop or select contacts from your list into the Participants field, or manually enter an external participant's email in the field and click Add.
4. To assign Meeting Co-Organizers, drag and drop contacts from your list into the Co-Organizers field or click on the 3 dots button next to a participant and select the "Assign co-organizer" option.
5. Once everything is set up, click on the "Schedule" option to send a notification out to every participant involved in the meeting, leaving the meeting details in their "Meeting list" as a reminder, as well as sending out an email notification.


Search internal contacts...
Meeting
Voice
Team chat
Contacts
Dashboard
SMS
Meeting
Settings
Instant Meeting
Join Meeting
Schedule Meeting
Meeting List
Subject
Description
Start
Apr 27, 2026
12:00 AM
Duration
0 hr
30 min
Time Zone: Central European Summer Time
Public (anyone can join)
Recurring
Participants
Kelvin Hoffman
Leon Hansen
External participant
Enter Email
Add
Co-Organizers
"Drag & drop" participant/s to assign Co-Organizer/s
Schedule
Remove all participants
Reset
Select or "drag and drop" new participants
Search Conta...
All Departments
Select all
Kelvin Hoffman
Leon Hansen
Ignacio Summers
Naomi Rivers
Jesse Jane
Sofia Lang
Julian Cross
Eliana Brooks
Lucas Grant

## Meeting List

1. Click the Meeting icon and select the Meeting List tab.
2. View Scheduled Meetings: Under the Scheduled sub-tab, you can see all upcoming meetings where you are a participant or organizer.
3. Review Past Meetings: Switch to the Previous sub-tab to access details and participant lists from your history. Click the Chat Records tab to view the full chat history from that session.
4. Manage Meetings: Select a meeting from the list to view its info. Depending on your permissions, you can use the buttons in the side panel to Start, Edit, or Delete the meeting.

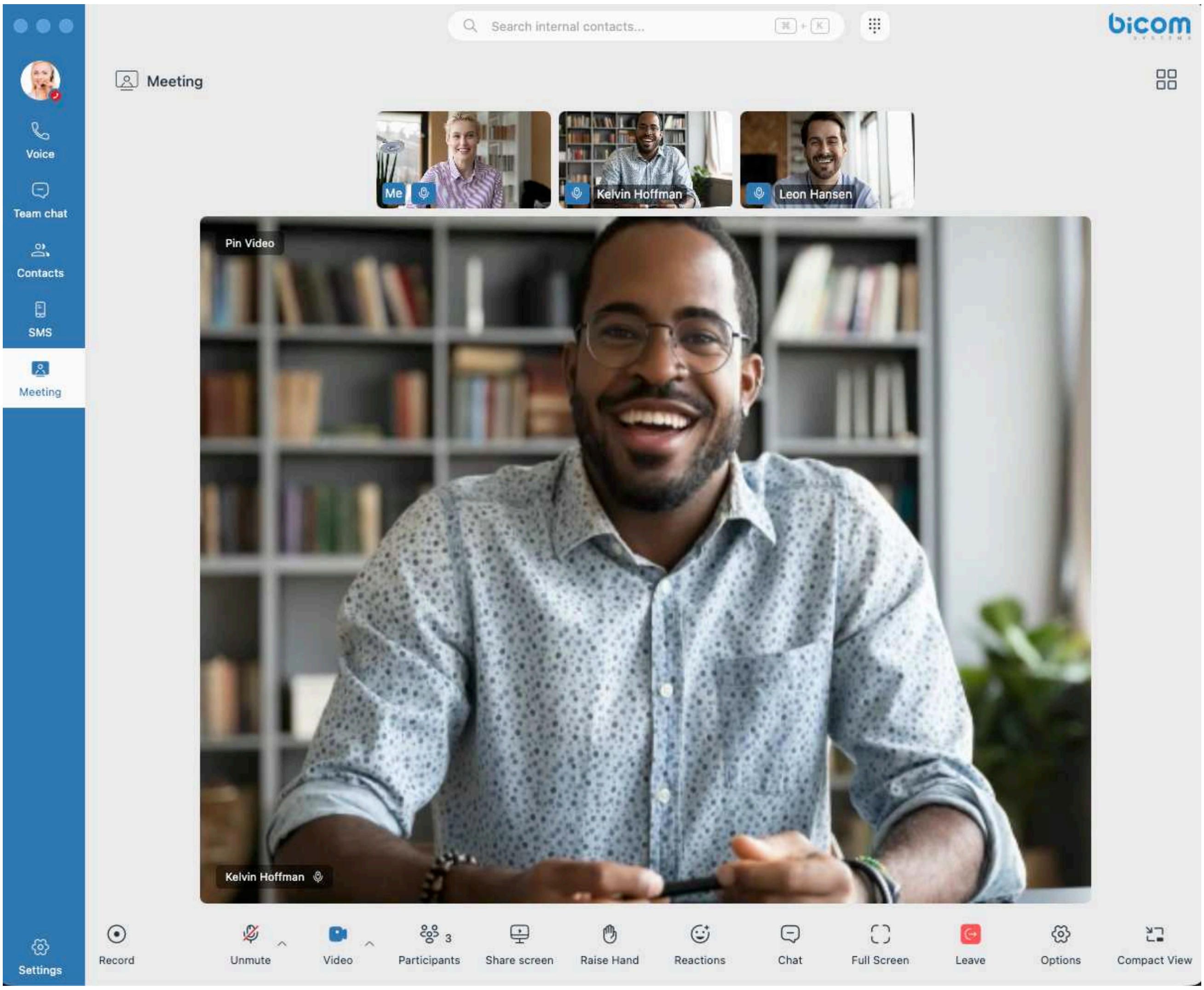



## Using Meeting

While in an active meeting, use the control bar at the bottom to manage your session:

1. Audio & Video: Toggle your microphone with Unmute/Mute or control your camera with the Video icon.
   - Click the arrow icon next to the Mute/Video buttons to switch devices (e.g., change your microphone, speaker, or camera) mid-call.

2. Collaboration Tools:
   - Share Screen: Broadcast your desktop or a specific window to participants.
   - Chat: Open the in-meeting chat panel to send messages and files.
   - Record: Click the Record icon in the bottom-left corner to start or stop capturing the session.
   - Raise Hand: Click the Raise Hand icon to signal to the organizer that you have a question or comment.
   - Reactions: Click the Reactions icon to send immediate visual feedback, such as emojis, to the group.
3. Participant Management:
   - Click Participants to view the attendee list and manage invitees.
   - Depending on your role, right-click a participant to Assign Co-Organizer, Reinvite, or Remove from meeting.
4. View & Layout:
   - Use Full Screen to expand the window.
   - Switch Layout: Toggle between Grid View and Speaker View using the layout icon in the top-right corner to change how participants are displayed.
   - Pin Participant: If you want to keep a specific participant in focus, double-click on their window to pin it; a Pin icon will appear to indicate they are locked in view.
   - PIP window: Switch to a PIP (Picture-in-Picture) window using the Compact View icon in the bottom-right corner to keep the meeting visible in a small overlay while multitasking.
5. Meeting Settings: Access advanced configurations by clicking the Options (gear) icon. Available options include:
   - Video Controls: Toggle incoming video to manage bandwidth.
   - Meeting Access: Switch to a Public meeting mid-call.
   - General Actions: Copy meeting info/links, enable keyboard shortcuts, or show/hide reactions and statistics.
6. Leave: Click the red Leave button to exit/end the meeting session.




# 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.

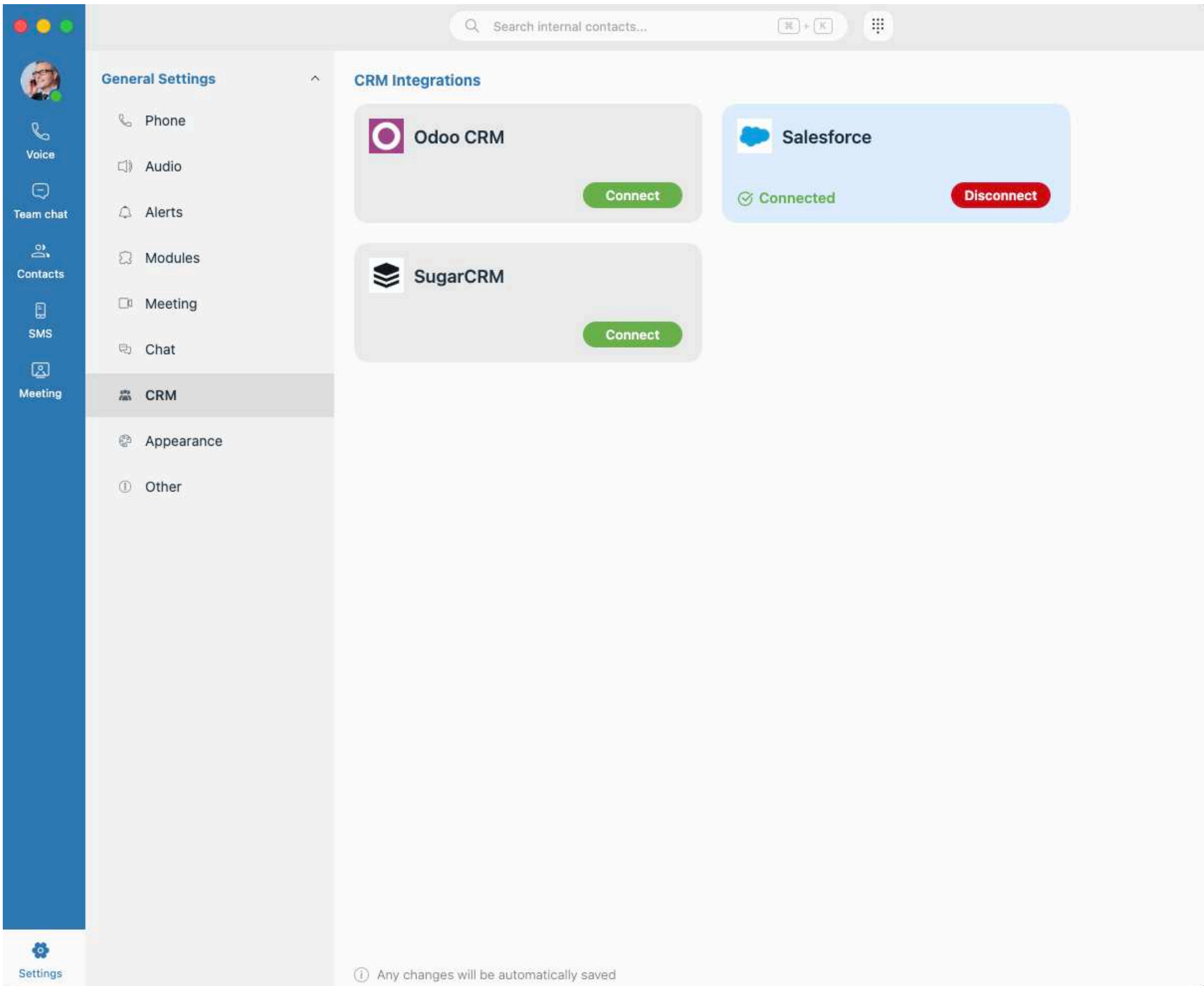
## CRM Integrations

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.

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.**

# 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.**