



A MITEL
PRODUCT
GUIDE

MiCollab

MiCollab Solution Guide - Enabling SMS Feature on MiCollab Client

February 2025

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Introduction

1

This chapter contains the following sections:

- [Scope of the document](#)
- [Intended audience](#)

1.1 Scope of the document

This document provides a detailed guide on deploying workflows, enabling Twilio through the Mitel Administration console, and subsequently creating SMS/text groups within the MiCollab Client.

1.2 Intended audience

This document is designed for Mitel Partners and Customer IT personnel, guiding them through the set-up on configuring text groups and enabling end-users to utilize the SMS feature within the MiCollab Client

Prerequisites

This chapter contains the following sections:

- [Enable CloudLink Chat](#)
- [Enable guest access from the Mitel Administration](#)
- [Twilio Requirements](#)

Before enabling the SMS feature, make sure to activate the following features on the account:

- Enable CloudLink Chat Integration
- Guest Access

If these capabilities are already a part of your system, then proceed directly to the section on [Twilio Requirements](#) on page 4 which is mandatory.

2.1 Enable CloudLink Chat

To enable CloudLink chat with MiCollab involves a two-step process:

1. The MiCollab administrator establishes a connection to CloudLink, if it is not already in service. This activation enables MiCollab users to use services on the CloudLink platform. While the MiCollab administrator can establish a connection to CloudLink (Mitel Administration), they must possess administrative privileges on CloudLink to do so.
2. Activate or enable the CloudLink chat for MiCollab users.

For the detailed procedure for the activation of users, refer to the *MiCollab CloudLink Solution Document*.

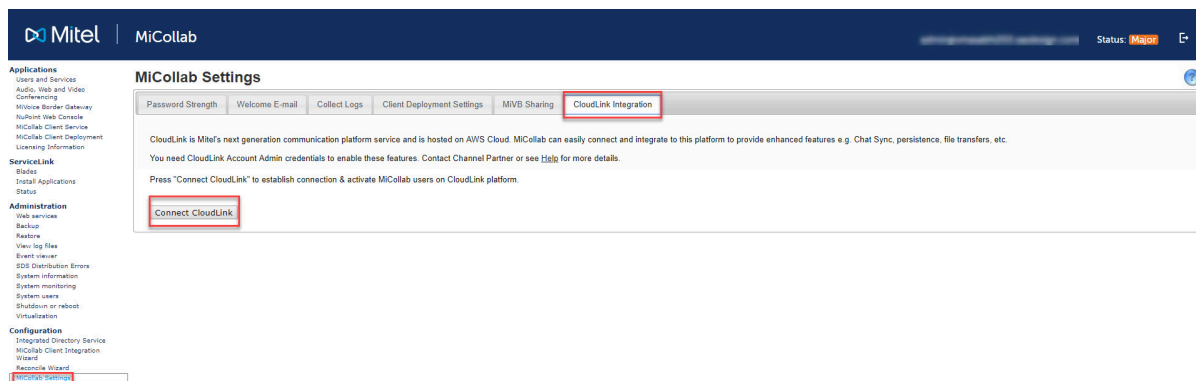
The next section guides you through the steps required to activate the CloudLink chat for MiCollab users.

2.1.1 Enable CloudLink Integration

1. In the MiCollab Administrator portal, under **Configuration**, click **MiCollab Settings**.

On the right pane, the MiCollab Settings page opens.

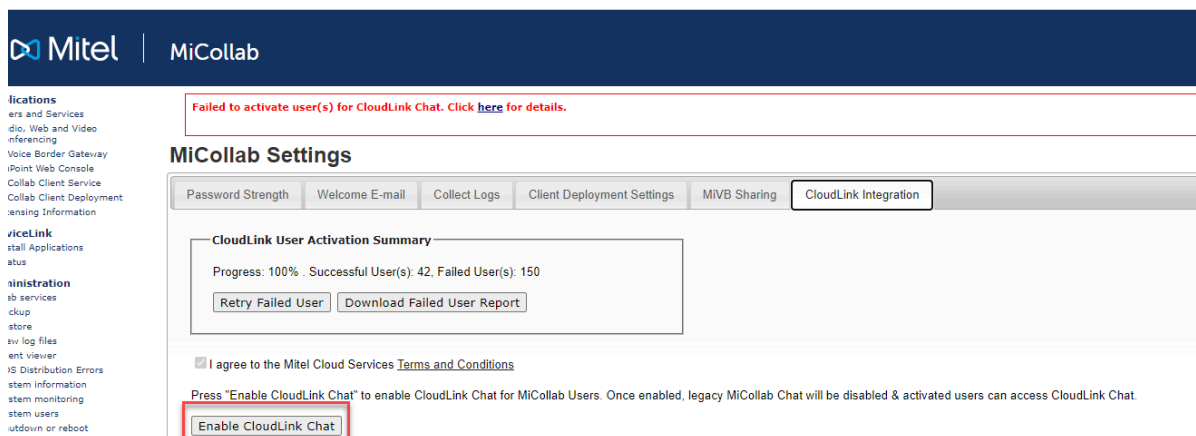
2. In the **CloudLink Integration** tab, click the **Connect CloudLink** button. A confirmation message appears that you are being redirected to the Mitel Authentication Portal for authentication.



3. Click **OK** to proceed.
4. In the **Mitel Authorization Portal**, enter your CloudLink account admin username (as given in the welcome E-mail that you received during CloudLink account creation) and then click **Next**.
5. Enter the CloudLink account admin password and click **Next**. The authentication process begins.

When the authentication is completed successfully, as indicated in the authentication status, MiCollab automatically starts the process of activating all the MiCollab users on CloudLink.

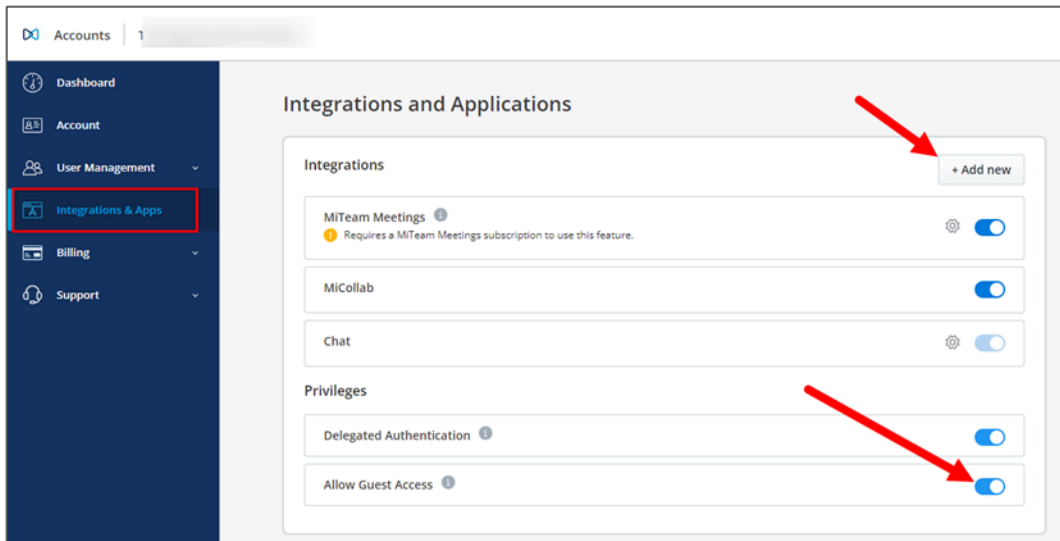
6. Once user activation is done, proceed to the next step and click on the **Enable CloudLink Chat** button to start CloudLink Chat for the activated MiCollab users.



2.2 Enable guest access from the Mitel Administration

Guest access in Mitel Administration enables users to start configuring the Twilio component.

Under **Mitel Administration** navigate to **Integrations and Applications**, and activate or enable the **Allow Guest Access** toggle button, if it is not enabled.



2.3 Twilio Requirements

Twilio is the message service provider for MiCollab SMS. As part of setting up SMS using Twilio, the customer or partner must register their use of SMS for conversational messaging. Twilio's Trust Hub helps them identify and confirm the use of Twilio's resources for services, which allows them to grant customers with access to advanced communication services.

When setting up the Twilio account, Mitel highly recommends requesting approval to register with the Twilio Messaging service for conversational messaging use by the customer. Mitel's service provides an application that enables Peer-to-Peer communication, a feature that some classify as a service for A2P communities. Twilio's website, in part, states:

Campaigns/use-cases that are provided special status and require additional approval before usage for:

- **Conversational messaging:** Peer-to-peer app-based group messaging and supporting personalized services - A2P communities.

Partners and Customers using the MiCollab SMS functionality must adhere to rules set in place by Twilio. Refer to [Trust Hub](#) and [Twilio](#) websites for set-up requirements and instructions.

Twilio rules differ in each country based on the country's regulations. For example, US companies in the US (and countries within Europe in 2024) must use the Twilio Trust Hub with very stringent rules. Twilio's Trust Hub allows partners and customers to confirm that they will comply with regional (i.e., Country) communication regulations

Before proceeding with the steps below, Twilio mandates the customers to register their account to obtain US-based 10-digit numbers for communications using MiCollab's SMS-based Text Messaging service.

Enabling the SMS feature for a MiCollab account

3

This chapter contains the following sections:

- [Enabling the Twilio account and SMS enablement from the Mitel Administration](#)

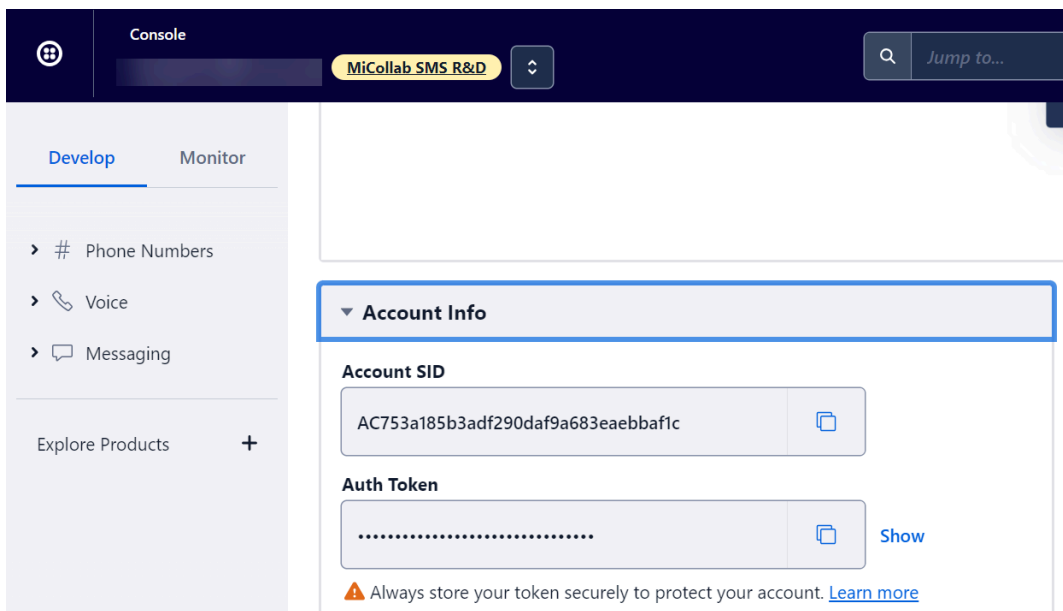
Enabling the SMS feature for a MiCollab account requires adherence to some mandatory configuration steps. To initiate this functionality, proceed with the following steps in the provided sequence:

1. Enabling the Twilio account and SMS enablement along with assigning provider numbers and assigning administrator roles to users from the Mitel Administration.
2. Triggering the slash commands via the MiCollab Client to enable text group for SMS. This is an optional step, but can be used in MiCollab, on a need basis. Text group can be created in the MiCollab client, from the Text tab. See section [MiCollab Text/SMS messaging](#) on page 11.

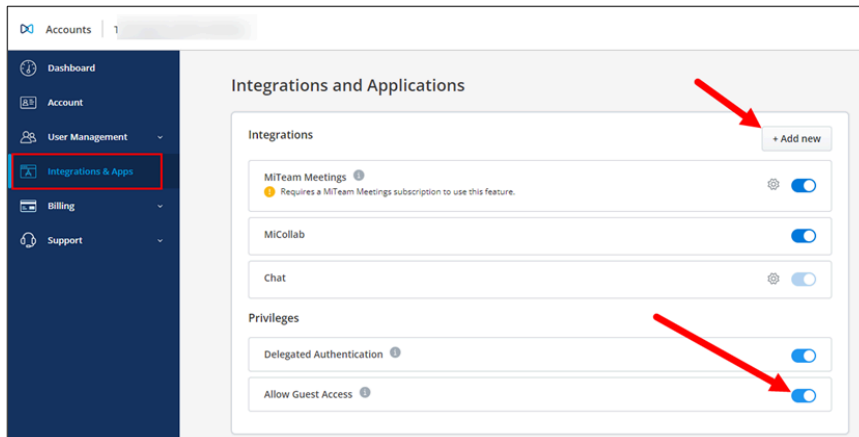
3.1 Enabling the Twilio account and SMS enablement from the Mitel Administration

This chapter outlines the process of accessing the third-party provider, Twilio, to import the service provider numbers required for enabling the Text Messaging service on MiCollab along with assigning Administrator roles to the users.

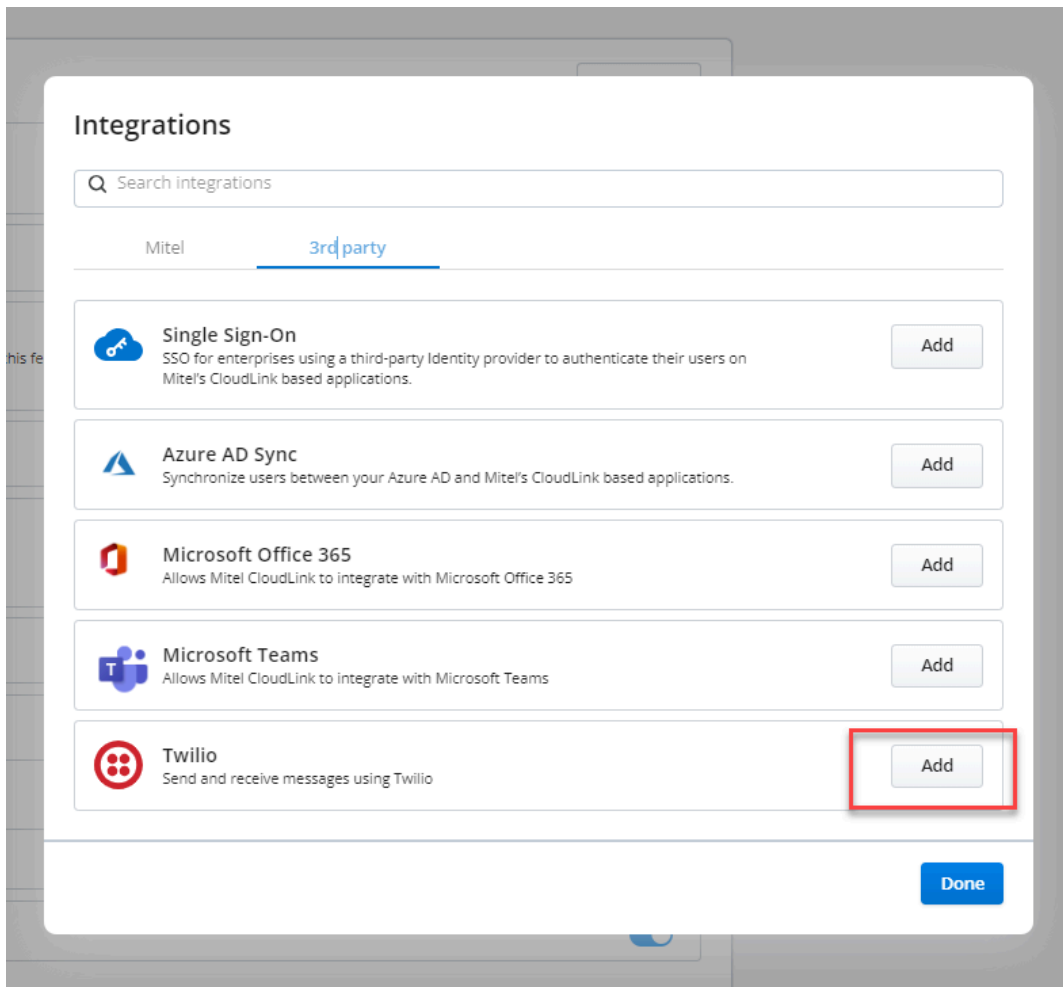
1. Log in to the Twilio account and access the Twilio console to retrieve or copy the **Account SID** and **Auth Token**.



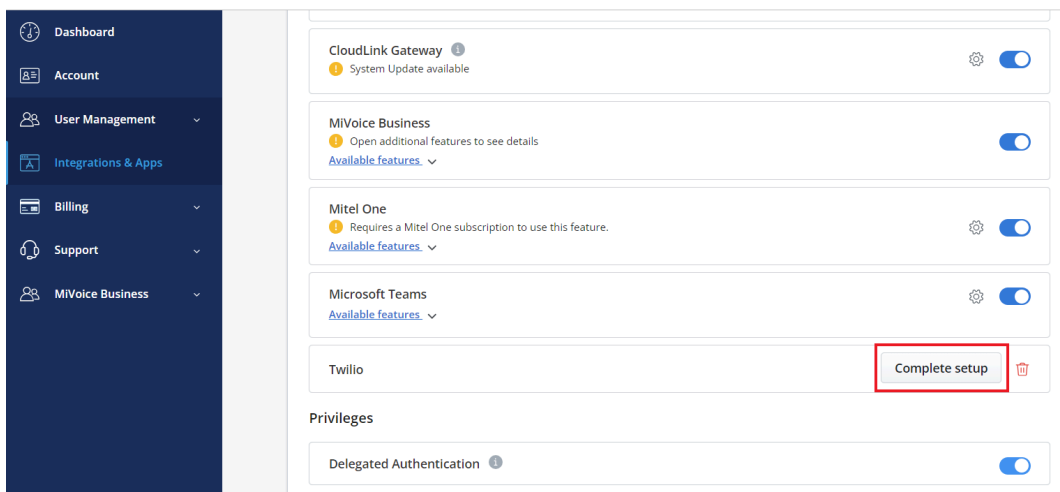
2. Access the Mitel Administration and navigate to **Integrations and Applications** , and then select the option to **+ Add new**



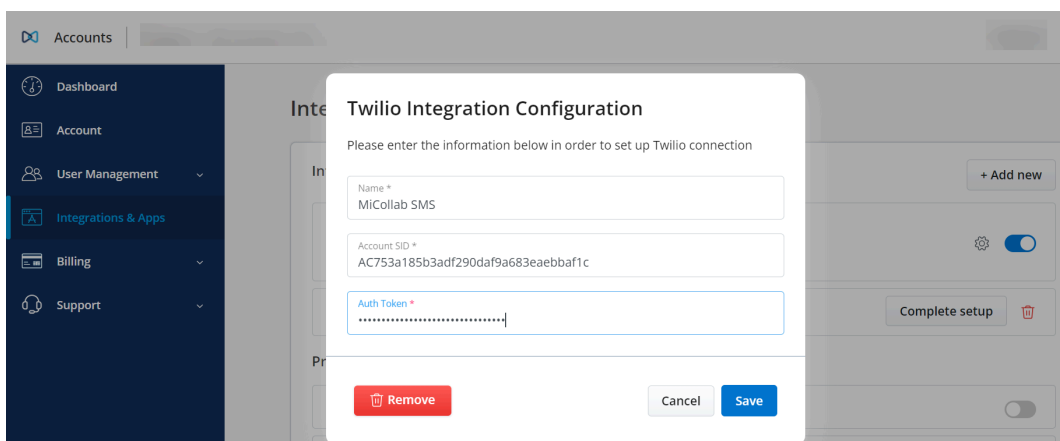
3. Select the **3rd party** tab and navigate to the **Twilio** option and select the **Add** button.



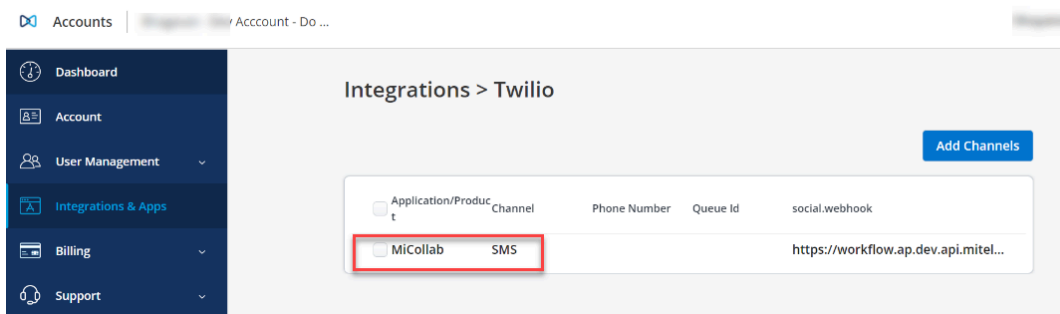
- Click on the **Complete setup** button to complete the Twilio integration.



- Within the **Twilio Integration Configuration** screen, enter an appropriate name in the **Name** field and paste the Twilio configuration (**Account SID** and **Auth Token** retrieved from the Twilio console as shown in [Step 1](#)) in the respective fields. Click **Save** to establish the configuration.



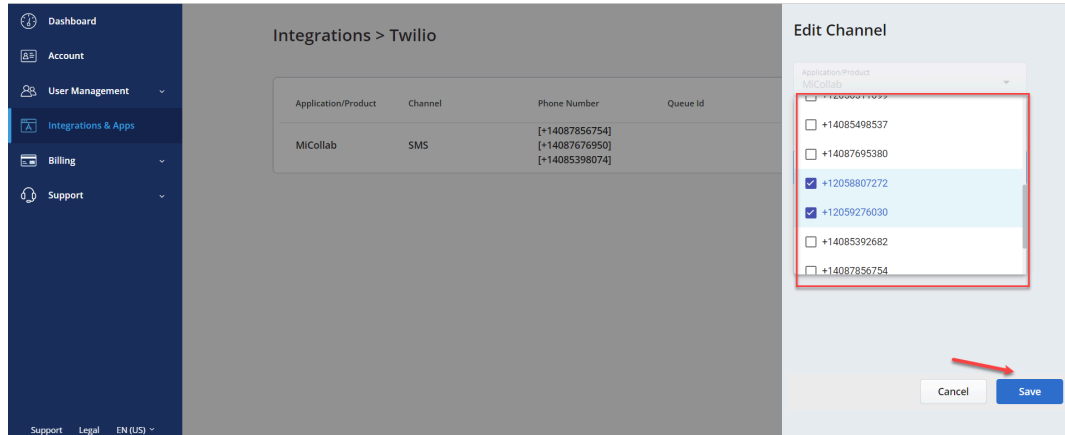
- Select the name that you have set up in the previous step, which in this example is "MiCollab SMS." This action establishes a connection to Twilio, enabling the user to choose the numbers to import for use with the MiCollab SMS-associated service.



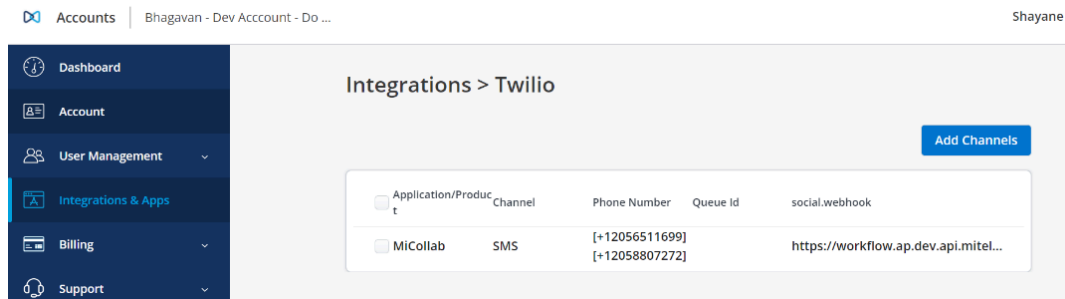
- The **Edit Channel** window appears, displaying the list of available phone numbers from Twilio. Choose the set of phone numbers from the **Phone Number** dropdown list and **Save** your selections.

Note:

The chosen phone numbers within this channel will be the numbers available as Provider numbers when forming SMS/text groups in MiCollab.



Result: The Mitel Administration Portal will import the selected numbers for use by the created service.

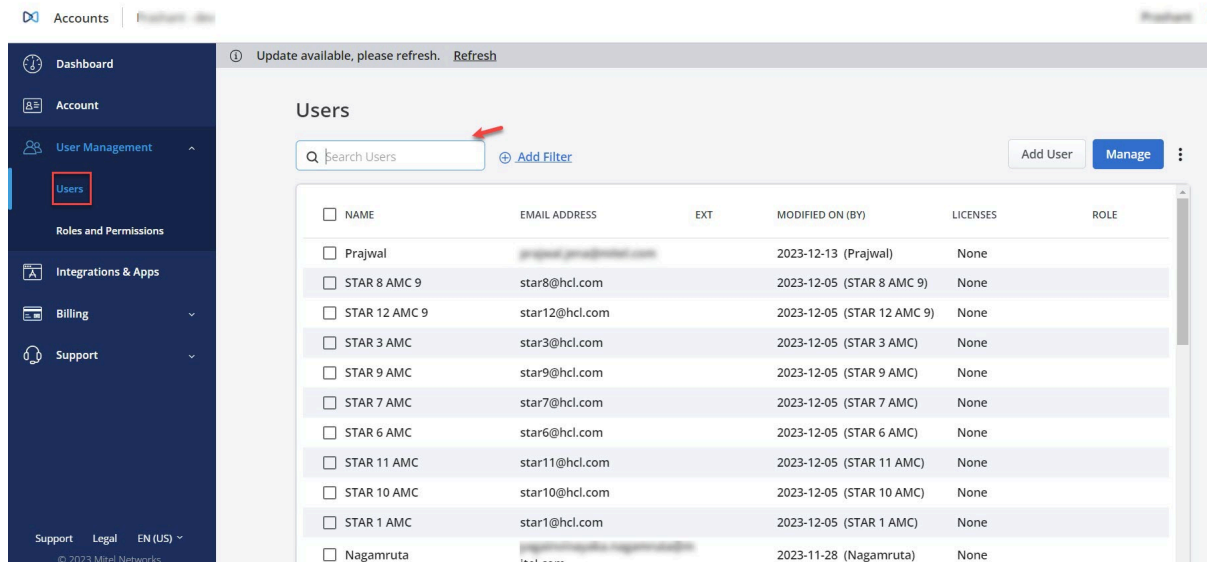


Assigning administrator roles to users

To assign administrator roles to the users, perform the following:

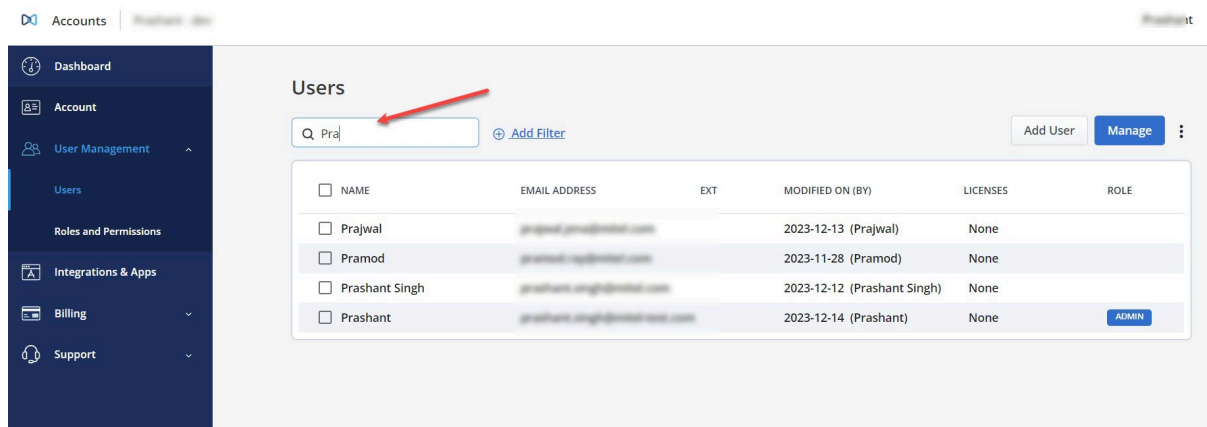
1. In the Mitel Administration, navigate to **User Management > Users**.

2. On the Users page, search for the names of the users you wish to designate with the administrator role.



The screenshot shows the 'Users' page in the MiCollab interface. The left sidebar contains navigation links: Dashboard, Account, User Management (with 'Users' highlighted), Roles and Permissions, Integrations & Apps, Billing, and Support. The main content area displays a table of users with columns: NAME, EMAIL ADDRESS, EXT, MODIFIED ON (BY), LICENSES, and ROLE. A search bar at the top of the table is highlighted with a red arrow. The table lists several users, including Prajwal, STAR 8 AMC 9, STAR 12 AMC 9, STAR 3 AMC, STAR 9 AMC, STAR 7 AMC, STAR 6 AMC, STAR 11 AMC, STAR 10 AMC, STAR 1 AMC, and Nagamruta.

<input type="checkbox"/>	NAME	EMAIL ADDRESS	EXT	MODIFIED ON (BY)	LICENSES	ROLE
<input type="checkbox"/>	Prajwal	prajwal.prajwal@hcl.com		2023-12-13 (Prajwal)	None	
<input type="checkbox"/>	STAR 8 AMC 9	star8@hcl.com		2023-12-05 (STAR 8 AMC 9)	None	
<input type="checkbox"/>	STAR 12 AMC 9	star12@hcl.com		2023-12-05 (STAR 12 AMC 9)	None	
<input type="checkbox"/>	STAR 3 AMC	star3@hcl.com		2023-12-05 (STAR 3 AMC)	None	
<input type="checkbox"/>	STAR 9 AMC	star9@hcl.com		2023-12-05 (STAR 9 AMC)	None	
<input type="checkbox"/>	STAR 7 AMC	star7@hcl.com		2023-12-05 (STAR 7 AMC)	None	
<input type="checkbox"/>	STAR 6 AMC	star6@hcl.com		2023-12-05 (STAR 6 AMC)	None	
<input type="checkbox"/>	STAR 11 AMC	star11@hcl.com		2023-12-05 (STAR 11 AMC)	None	
<input type="checkbox"/>	STAR 10 AMC	star10@hcl.com		2023-12-05 (STAR 10 AMC)	None	
<input type="checkbox"/>	STAR 1 AMC	star1@hcl.com		2023-12-05 (STAR 1 AMC)	None	
<input type="checkbox"/>	Nagamruta	nagamruta.nagamruta@hcl.com		2023-11-28 (Nagamruta)	None	



The screenshot shows the 'Users' page after a search for 'Praj' has been performed. The search bar at the top of the table is highlighted with a red arrow. The table now displays only four users: Prajwal, Pramod, Prashant Singh, and Prashant. The 'Prashant' user has an 'ADMIN' role, indicated by a blue button in the ROLE column.

<input type="checkbox"/>	NAME	EMAIL ADDRESS	EXT	MODIFIED ON (BY)	LICENSES	ROLE
<input type="checkbox"/>	Prajwal	prajwal.prajwal@hcl.com		2023-12-13 (Prajwal)	None	
<input type="checkbox"/>	Pramod	pramod.pramod@hcl.com		2023-11-28 (Pramod)	None	
<input type="checkbox"/>	Prashant Singh	prashant.singh@hcl.com		2023-12-12 (Prashant Singh)	None	
<input type="checkbox"/>	Prashant	prashant.singh@hcl.com		2023-12-14 (Prashant)	None	ADMIN

3. Upon choosing the username, click on the username to access the user detail page. Enable the **MiCollab SMS Account Admin** toggle and **Save** the changes.

The MiCollab SMS administrator is now created.

The screenshot displays the 'Accounts' section of a management interface. On the left is a dark blue sidebar with navigation links: Dashboard, Account, User Management (expanded), Users, Roles and Permissions, Integrations & Apps, Billing, and Support. The main content area shows the user detail page for 'Prajwal'. The user's profile includes a blue circular avatar with the letter 'P' and the name 'Prajwal'. Below the profile are several input fields: 'Name' (Prajwal), 'First Name' (Prajwal), 'Last Name' (Prajwal), 'Email *' (prajwal@mi-collab.com) with a green checkmark, 'Username', 'Mobile Number' (with a Canadian flag icon), and 'Extension'. To the right of these fields are two toggle switches: 'Account Admin' (disabled) and 'MiCollab SMS Account Admin' (enabled, highlighted with a red rectangle). At the bottom left of the form is a link 'Reset CloudLink password' and a note '*required'.

MiCollab Text/SMS messaging

4

This chapter contains the following sections:

- [End-user view](#)
- [Administrator view](#)

In Release 10.0, the MiCollab SMS feature brings in two new tabs to the Messages menu: the **Text** tab and an additional **Admin** tab. The **Admin** tab is exclusively accessible to users with administrator privileges. The administrator privileges are set from the Mitel Administrator console. For details on how administrative privileges are set, refer to [Enabling the Twilio account and SMS enablement from the Mitel Administration](#) on page 5.

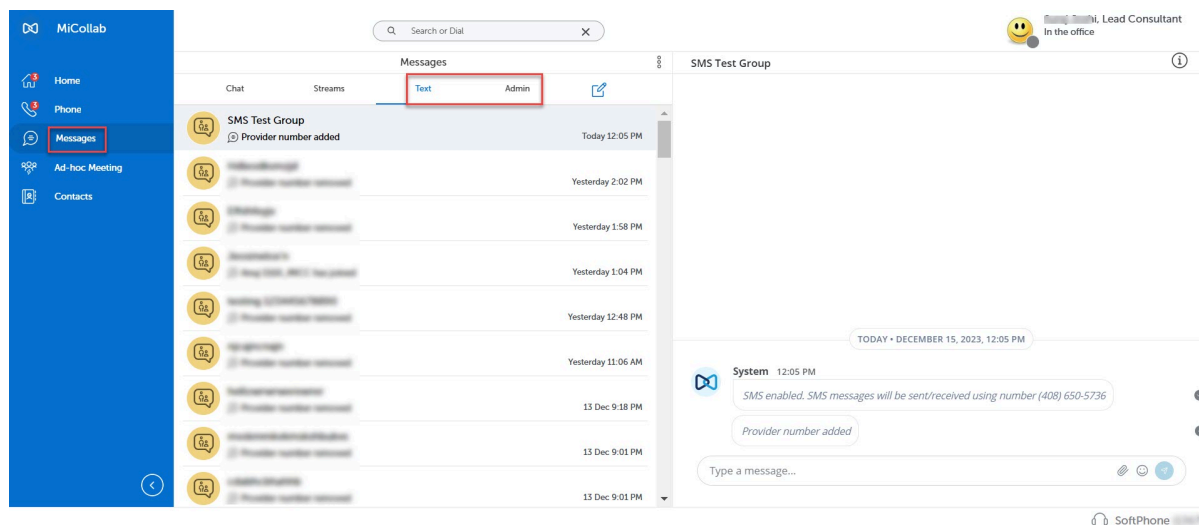
This feature allows MiCollab users to have the ability to send and receive text messages through a partner provider number; Twilio is the SMS service provider for this feature. The outbound and inbound messages can only be texts, media or both. The supported media formats are restricted to PDFs and image files as attachments.

Note:

The PDF and images should not exceed more than 5 MB, a restriction imposed by Twilio. Wireless carriers may impose possible tighter limitations on attachments.


Note:

When peered servers are integrated with the same CloudLink Channel partner account, the names of peered server users will be shown in the Chat component, Info page, and on the Edit page for Streams, Text streams, and Admin streams. Otherwise, it will display as an unknown user.




4.1 End-user view

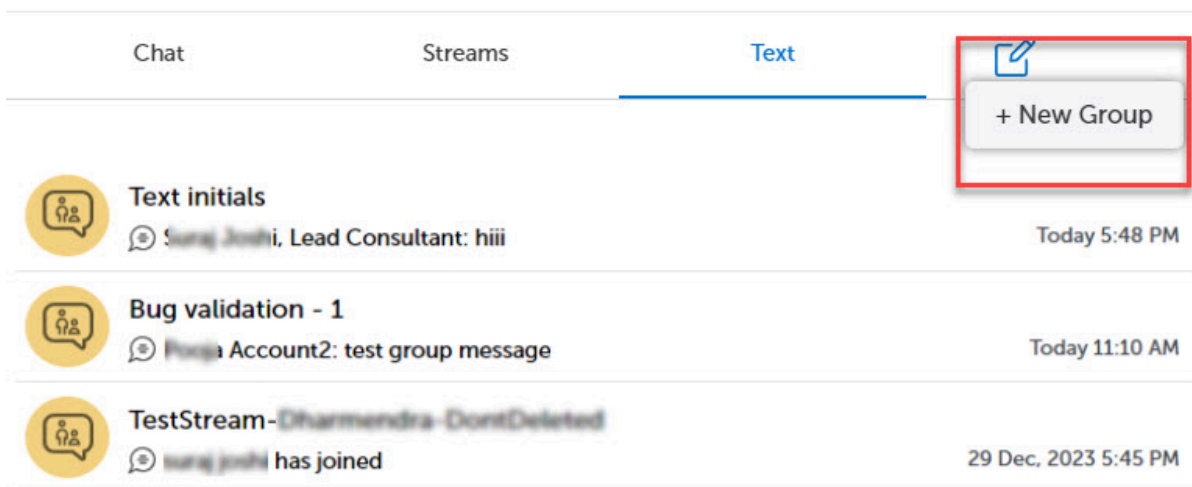
A MiCollab end-user sees the **Text** tab introduced in MiCollab Client 10.0 under the **Messages** menu, alongside the **Chat** and **Streams** tab. The **Text** tab will list all the groups in which an end-user is a part of. When you hover over the text groups, only the message icon is displayed, and when you right-click on the text groups, the context menu is displayed with the following menu options of **Text**, **Leave**, **Edit**, **Add to**

Home. Clicking the **More** icon () on the top-right displays the **Leave** option.

To create a text group as an end-user

1. From the left navigation menu of the MiCollab Client, select **Messages > Text** tab.
2. Click on the *Edit/Compose* () icon next to the **Text** tab to show the **+ New Group** option. Click on this option to create a new SMS or Text group.

The **New Group** page opens on the right window.

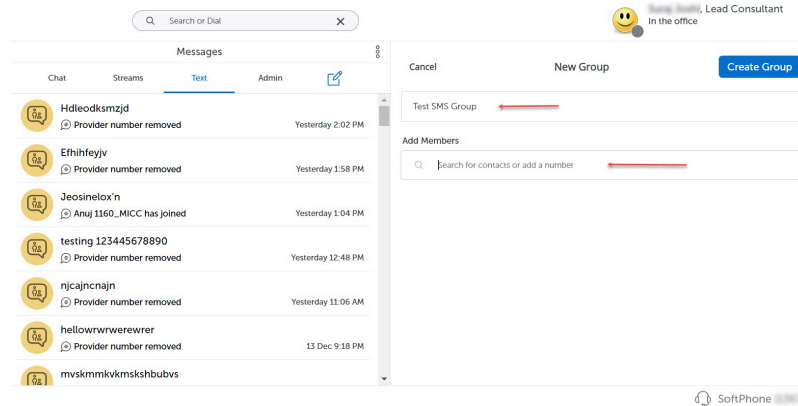


3. Add a group name in the **Group Name** field.
4. Next, in the **Add Members** field, search for contact names or phone numbers to add the participants to the group. If the contact or phone number is already in the system, the user sees the contact in the list below the input box, which the user can select. If a contact is not already present in the system, input the entire number in the field. The type of contacts that can be added here are:
 - **MiCollab Corporate contacts**
 - **External contacts (includes personal, external, CloudLink guest contacts as well)** - Contacts external of the AD

For both MiCollab Corporate contacts and External contacts (includes personal, external, CloudLink guests), start by typing the contact number or alphabet, and all the searched contacts that have valid

phone numbers will be displayed in the search list from which the user can select the contacts to be added.

Click the **+** icon or the Enter key to add the number; if the contact number is invalid as per the locale, an error message is displayed, stating *Enter a valid number* . If the number is a valid number, it gets added as a participant and is displayed in the selected list.



Note:

Emergency numbers (for example, 911) are not supported and cannot be added as participants to the SMS or text group creation.

Note:

The phone numbers will be shown in E.164 format

5. Once all the numbers are added, the selected numbers (in case of external) and the names appear on the list, and the system uses this list for the participants when the user clicks the **Create Group** button on the top right of the *New Group* page.

Rajesh Kumar, Lead Consultant
In the office

Cancel New Group Create Group

SMS Test Group

Add Members

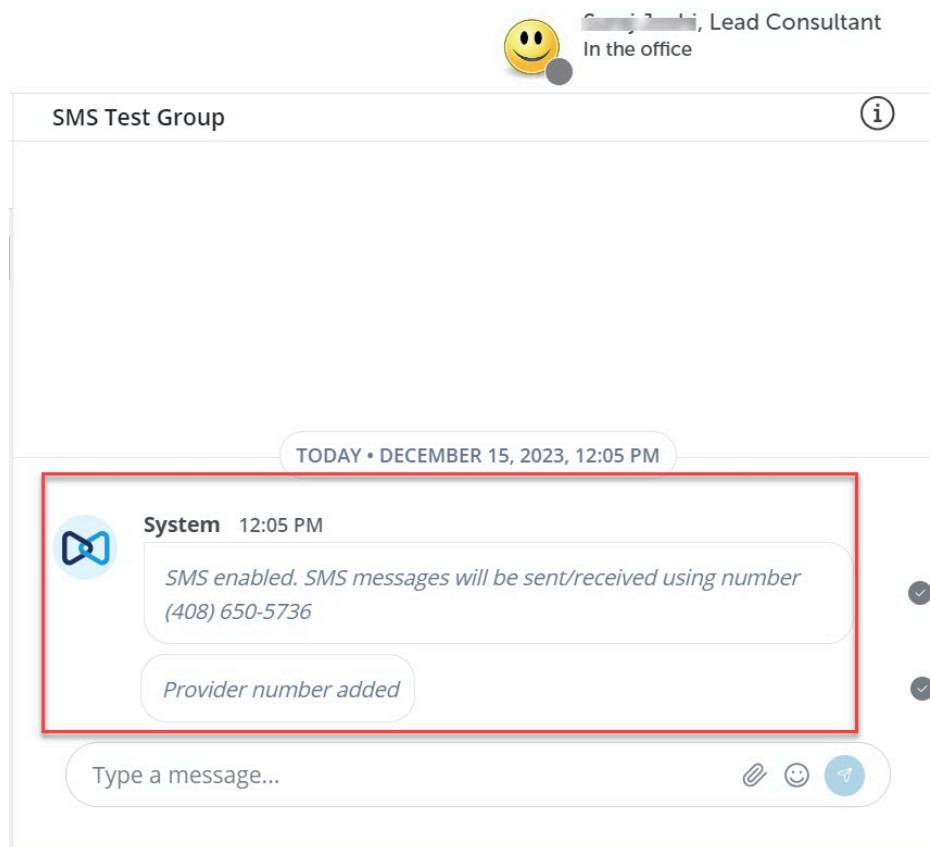
Search for contacts or add a number

Shekhar X

SoftPhone (1367)

- The newly created group is listed under the **Text** tab. The new SMS or Text group is now ready for sending/receiving messages similar to the MiCollab Chat or Stream.

The message text box of the Text tab comprises only the attachment icon, Emoji icon, and the Send Arrow.



Note:

The location-sharing and the voice message recording icon are unavailable in the message box for the SMS groups/ Text created under the Text tab.

Note:

In the event that no free provider numbers are accessible under the Text tab, clicking on the New Group + icon will trigger a notification within the Create Group window, and the Create Group button will be deactivated.

Cancel

New Group

Create Group

I'm sorry, but it appears that there are no more phone numbers available for you to start a new group. Please contact your administrator for further assistance.

To view the group information

1. Under the **Text** tab, select the group for which the group information is to be viewed.
2. Click the *Info* icon from the top-right corner of the Group.

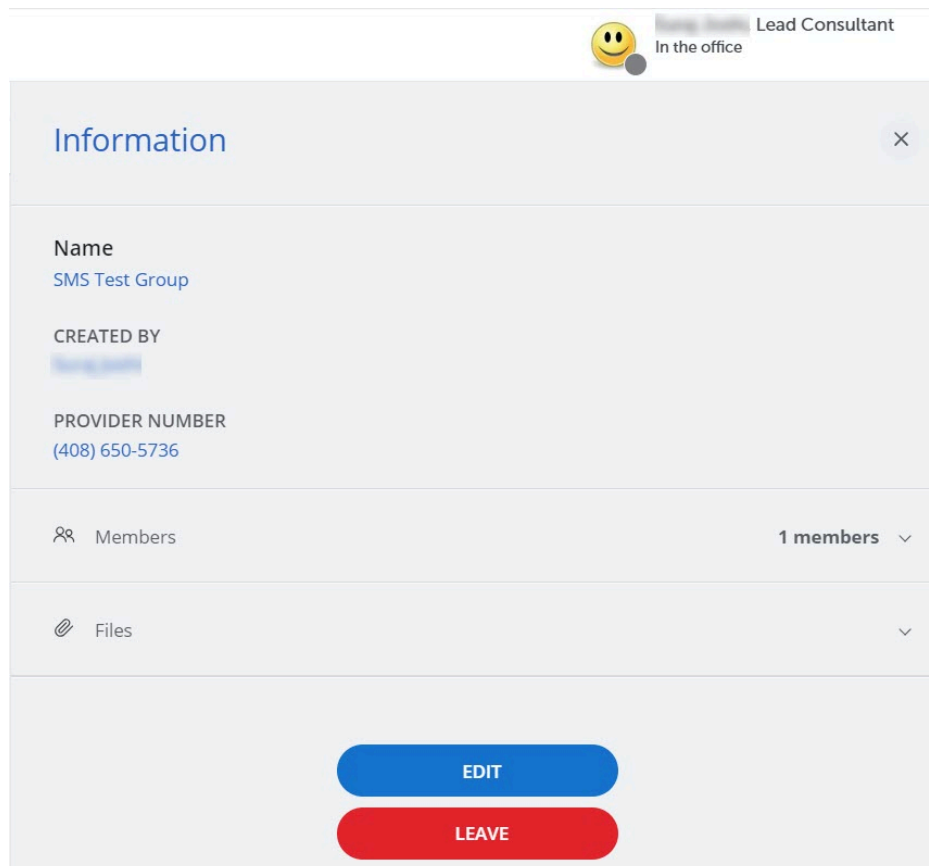
The information about the group opens up and displays the *Name* of the group, *Created by*, *Provider number* along with the list of *Members* and *Files* option, which opens up all the files that have been shared in that group.

3. You can click on **Edit** to modify the current information, which opens a window to allow the user to add new participants and/or delete existing participants or view the information.

OR

You can click on **Leave** to remove yourself from the group. Upon clicking on the **Leave** button, a confirmation pop-up appears, asking whether to leave or cancel the action. Clicking **OK** removes this user from the group.

To exit the information page without making any changes, click the **x** in the upper right corner.



To edit the Text Group information

1. In the **Text** tab, click on the SMS or text group name.

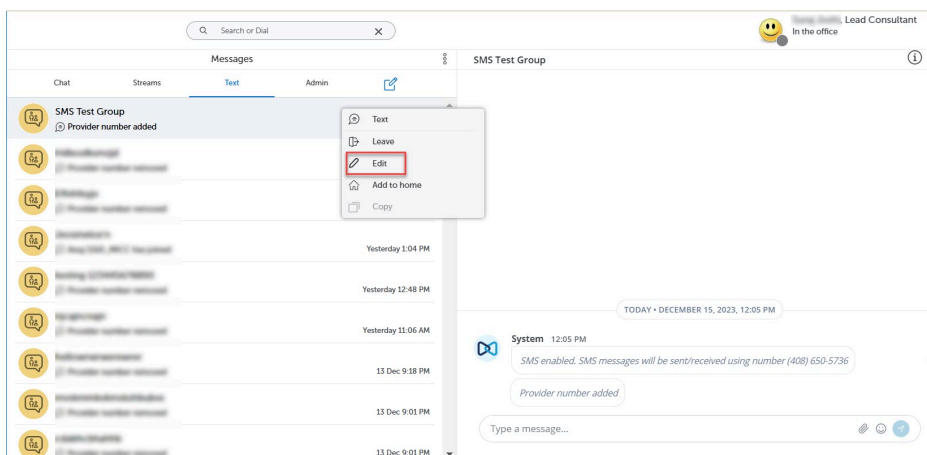
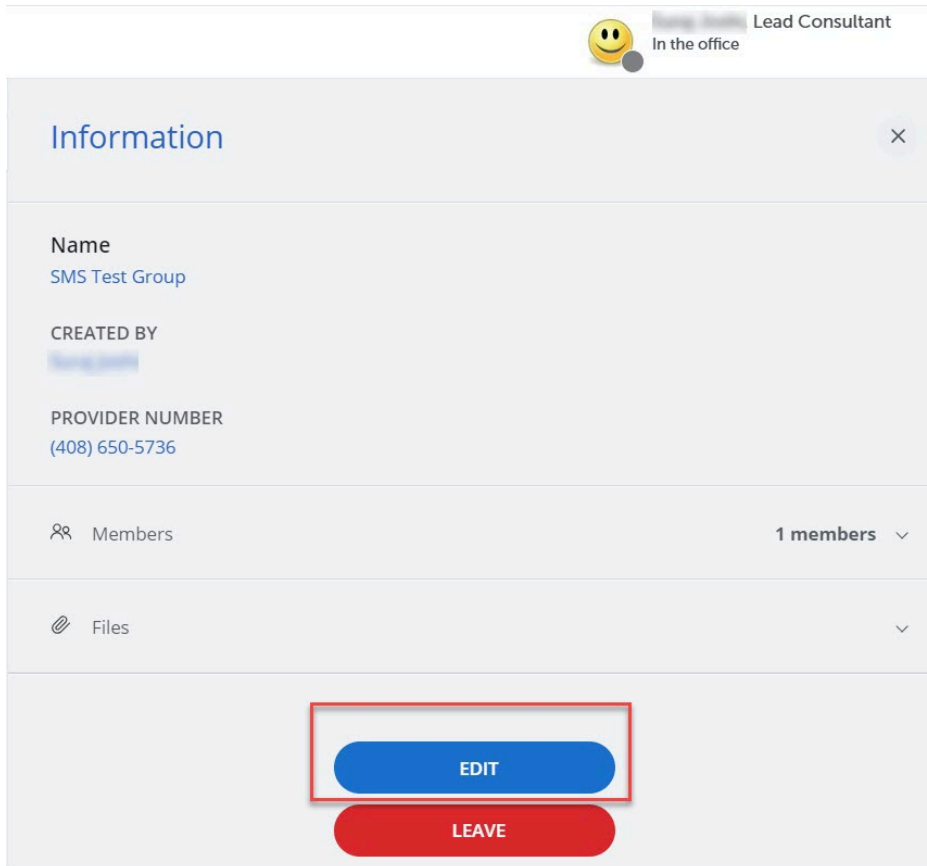
On the right pane, the info icon appears on the top-right.

2. Click the info icon to display the group's information.

3. On the *Information* page, click on **Edit**.

OR

In the **Text** tab, initiate a right-click on the listed text group to open the context menu and select **Edit**.



Note:

The Video Meet option will not be listed in any of the menus (Quick Launch Menu, Context Menu) under the Text tab.

The **Edit** page will open on the right window of the MiCollab Client.

The group **Name**, **Add Members** fields can be edited or modified, and the list of existing members can be deleted from the group, or new members can be added to the group.

4. Click **Save**.

To remove participants from a text group

Note:

The Provider number cannot be deleted or edited in the **Text** tab because the Provider number is not visible in the participant list of **Text** tab. Whereas in the **Admin** tab, the Provider number is visible and it can be deleted.

Note:

A MiCollab corporate user cannot leave a group unless another MiCollab corporate user is present in that group. In such cases, an error message will be displayed: *You can not leave the group text unless there is another internal corporate user. Please add an internal corporate user to the group and try afterwards*

Note:

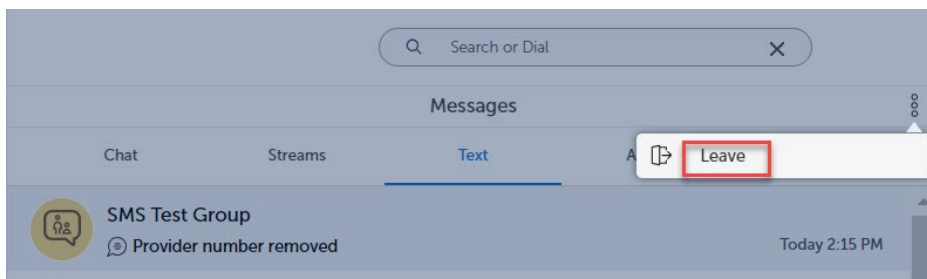
If the administrator removes the provider number from any group, that specific group will still appear in both the **Text** tab (if the logged-in user is a member) and in the **Admin** tab.

1. From the **Text** tab, choose the text group from which you want to remove one or more participants.

On the right pane, the info icon appears on the top-right.

2. Click the info icon to display the text group's information and click **Edit**.
3. To remove an external participant from the stream, click the **X** icon next to the participant. Click **Save** on the top-right corner of the page to save the changes. The text group will trigger a message that the participant has been removed.

To individually exit a group, select the group from the Text tab, click on the More icon and select the **Leave** option to exit that group.



4.2 Administrator view

End-users with administrator privileges will see two additional tabs, **Text** and **Admin**, under the **Messages** menu.

Text - In your role as an administrator, under the **Text** tab, you will have visibility into the groups in which you are an active participant. Your permissions within these groups will be identical to those of a regular user.

Admin - The Administrator, on selecting the **Admin** tab sees the complete list of text groups. The Administrator might be a part of the group or may not even be a participant or creator of the text group. The administrator can add or remove participants from these text groups and alter the name of the text group.

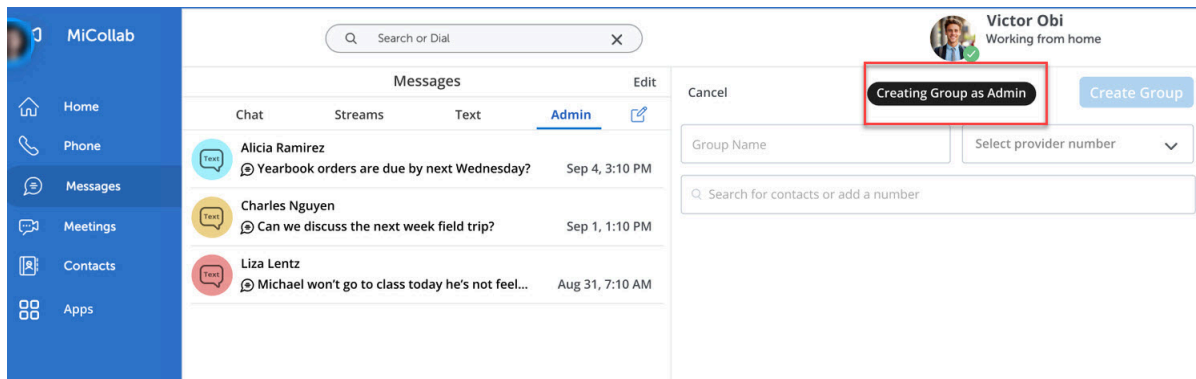
The default setting ensures that the administrator is not a part of the text group created via the Admin tab. However, the administrator has the option to voluntarily include themselves in the group during its creation. Once a text group is created, the administrator cannot add themselves to the group later.

When you click on a group in the list, the information page opens directly for the selected group with only the **Edit** option enabled, and the Text group's name, Creator's name, and Provider number are displayed along with the list of members. The Administrator can select the **Edit** option to manage the participants in this group.

When a user is set up as an SMS account administrator during the MiCollab client's runtime, the client will display the Admin tab upon the user's selection of the Messages menu from the left navigation pane. Conversely, the same holds true in the opposite scenario. Therefore, for any changes to be visible in the MiCollab Client UI, it is important for the users to click on the Messages menu to view the updated changes.

Create a group as an administrator

In the **Admin** tab, the steps in creating a group resemble that of a typical user. However, a prominent black label titled **Creating Group as Admin** is displayed, which ensures clarity that all actions are performed with administrative privileges. Additionally, in the Admin tab you can select the Provider number from the dropdown menu available under **Select provider number**



i Note:

If there are no free provider numbers available, the Administrator will be notified with a message in the **Create Group** window, and the Create Group button will be disabled.

Cancel

New Group

Create Group

I'm sorry, but it appears that there are no more phone numbers available for you to start a new group. Please contact your administrator for further assistance.

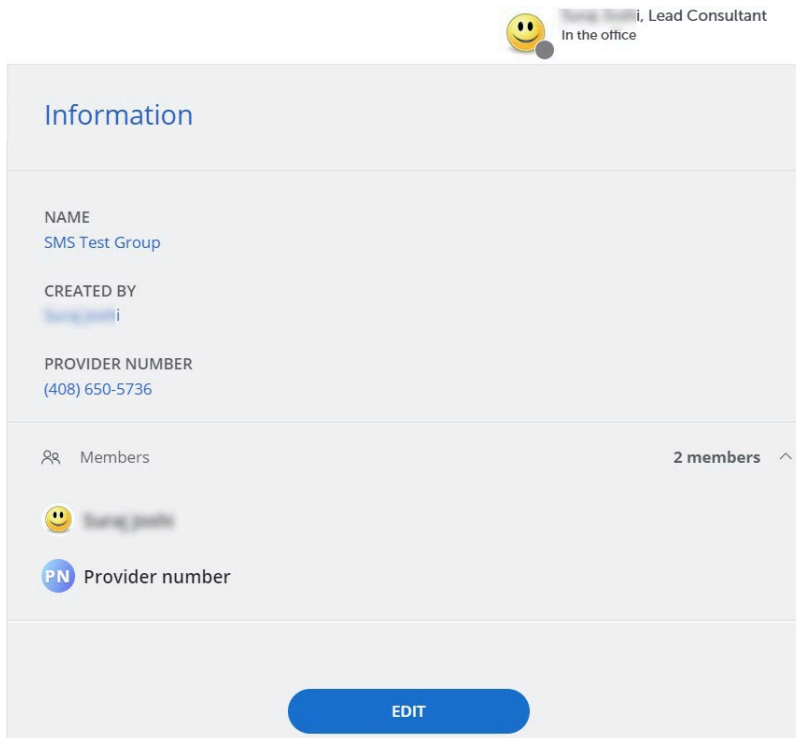
In the **Admin** tab, the system lists all groups and text groups for this customer, even if the administrator is not a participant of that group or created the group. While the names of Text Groups are listed and visible, the administrator in the **Admin** tab cannot access the content within the text group.

The Administrator in the **Admin** tab can only perform changes to the fields associated with the group and the membership of the group. If the administrator wants to view a group's messages, the administrator must exit the **Admin** tab. Then, they can see the messages for groups they are a member of by selecting the **Text** tab and then the desired Text Group. To access the actual content of a group in which the administrator is a member, they must navigate to that specific group under the Text tab. As an administrator, clicking on a group in which you are not a participant will directly open the information page on the right pane and for all the groups listed in the **Admin** tab of the MiCollab client. Here, you will find only the **Edit** option enabled, allowing you to add or remove participants and modify the name of the text group.

To edit a text group

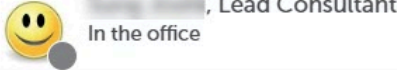
1. In the **Admin** tab, click on the Text / SMS Group name.

On the right pane of the MiCollab Client, the Info page opens to display the group information.



2. On the *Information* page, click on **Edit**.

The **Name**, **Add Members** fields are enabled for the administrator to edit/modify, and the list of existing members can be deleted from the group, including the creator of the group.




Cancel

Text Group

Save


SMS Test Group

Add Members

 Search for contacts or add a number


P

Provider number



×

×

 SoftPhone (1367)

3. Click **Save**.

Contact Management

5

This section outlines the process of handling CloudLink contacts within MiCollab Clients. Only MiCollab Client users with SMS Admin privileges can create External Contacts and these contacts will be designated as guest contacts on CloudLink, and they will be accessible at the account level (CloudLink channel partner account). All users within that account can access these contacts, which will be showcased in the External tab of the Contacts menu in the MiCollab Client.

When you add an external contact with the same number as an SMS member, the SMS member's name will be displayed instead of the number.

Important:

As an administrator, it's absolutely critical to prioritize data privacy when adding external contacts, including their names and numbers. This is an essential step for maintaining the confidentiality and security of the information available to MiCollab users.

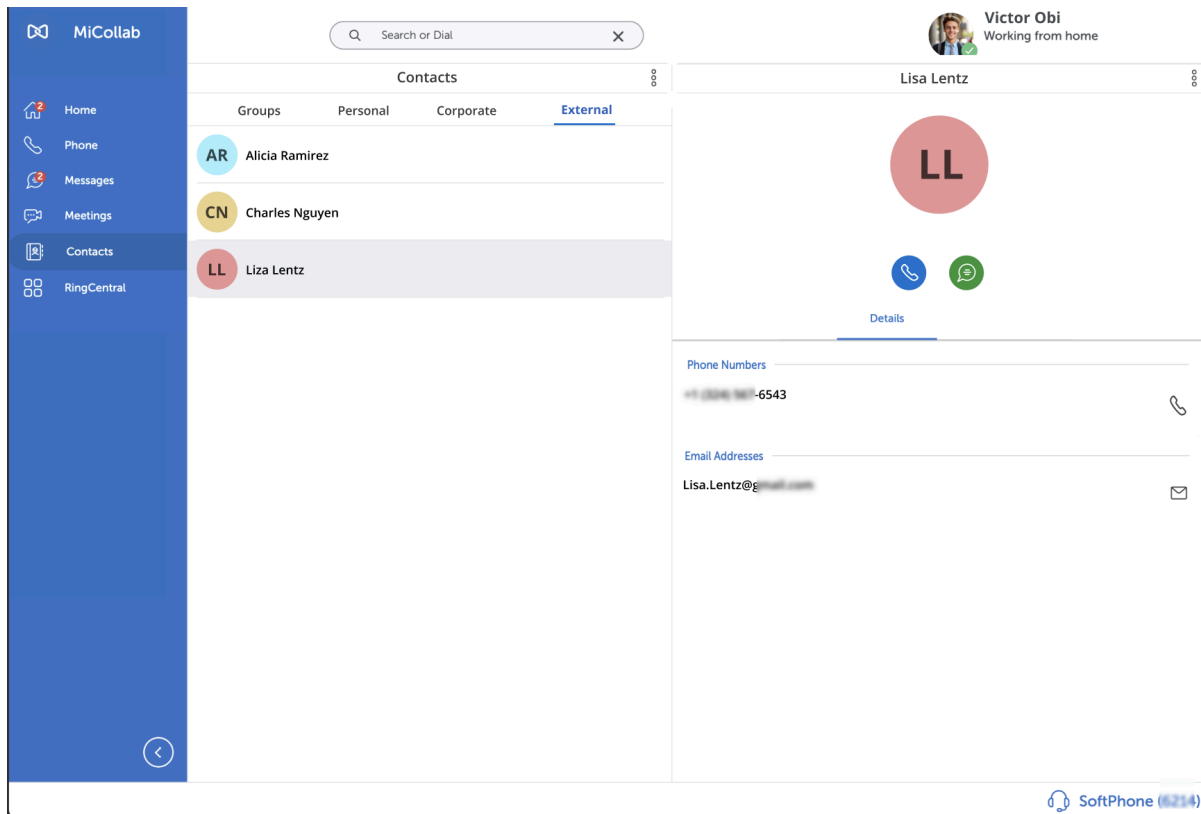
Note:

When using the MiCollab Mobile clients, an extra option appears showing **+Add to personal** when selecting an external contact.

Important:

The Add Contact, Delete Contacts, and Edit permission is restricted to ONLY SMS users with administrator privileges.

When a user starts a global search for external contacts, the search will include guest or CloudLink contacts and external contacts (Active Directory contacts) and show the results from both sources.



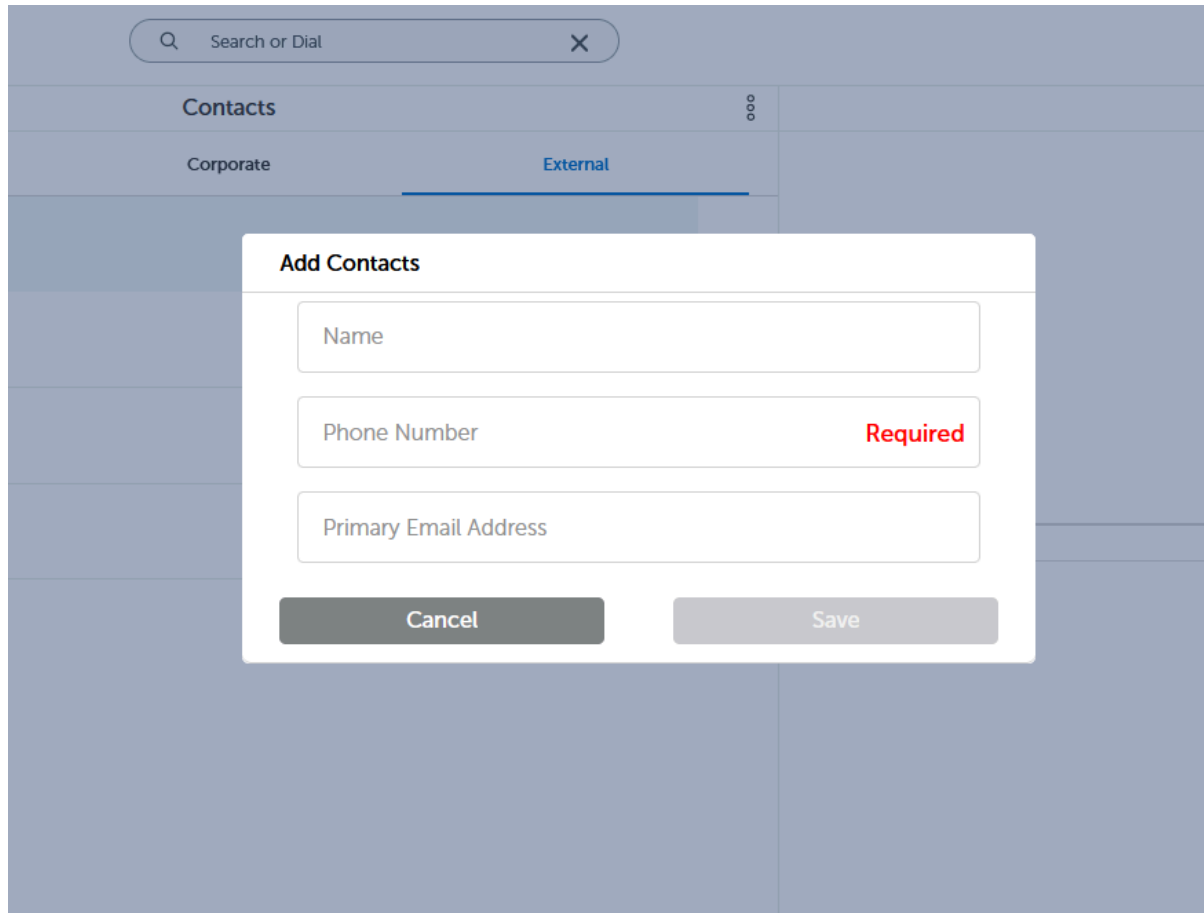
To add a new CloudLink contact

1. In the **Contacts** menu, from the **External** contacts tab, click on the More menu.
2. From the **More** menu, click on **Add Contact**.

The **Add Contacts** window opens.



3. In the Add Contacts window, enter the *Name* , the *Phone number* (which is a mandatory field), and the *Primary email address* of the contact.

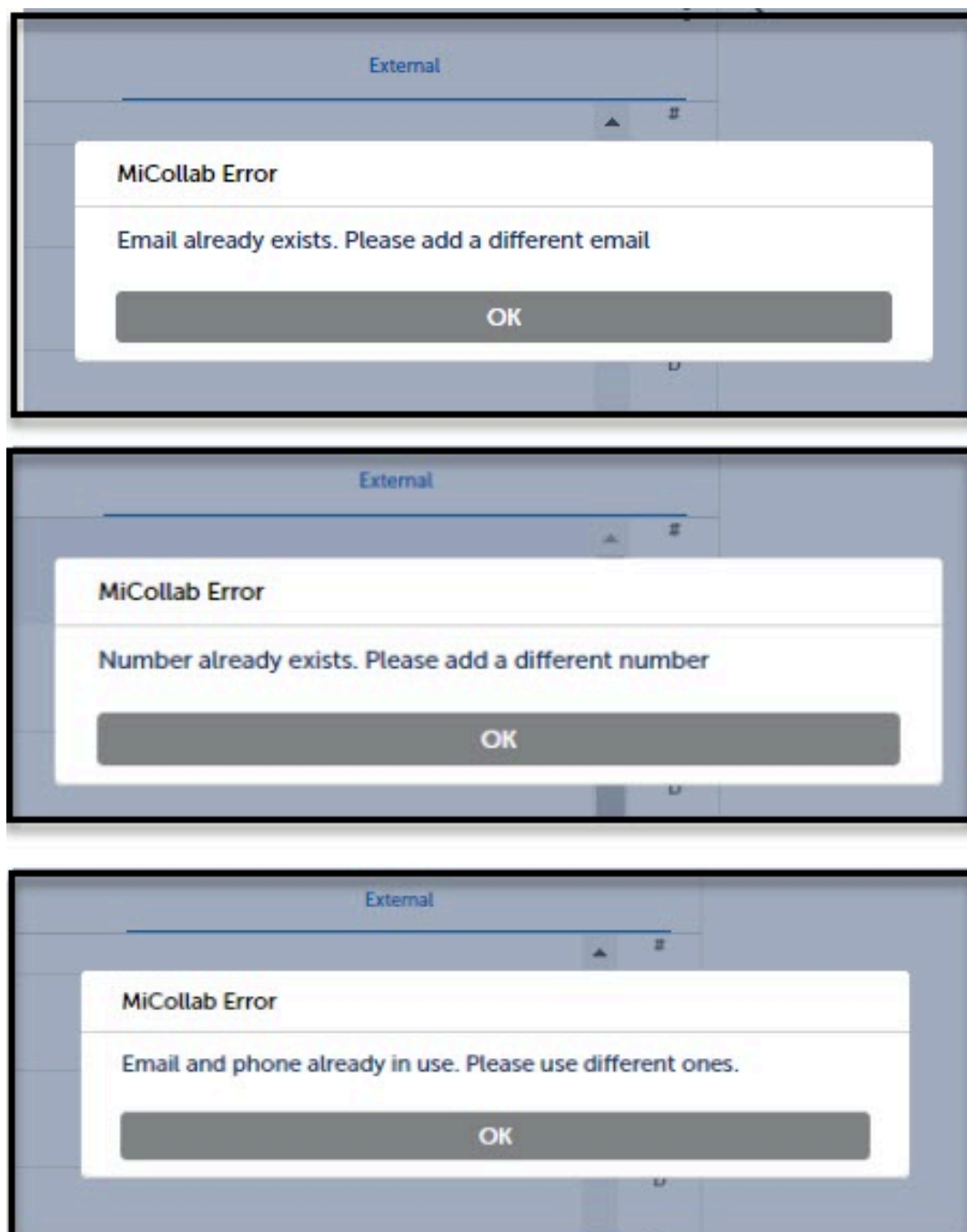


The screenshot shows a web application interface for contact management. At the top, there is a search bar labeled 'Search or Dial' with a magnifying glass icon and a close button. Below the search bar, the 'Contacts' section is visible, with tabs for 'Corporate' and 'External'. The 'External' tab is currently selected. In the center of the screen, an 'Add Contacts' dialog box is open. This dialog box contains three input fields: 'Name', 'Phone Number', and 'Primary Email Address'. The 'Phone Number' field is marked as 'Required' in red text. At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Save'.

4. Click **Save**.

Note:

If a user attempts to save a contact with a duplicate number, email, or both already existing in the directory, they will receive a pop-up notification informing them that the number or email is already in the system.




To delete a CloudLink (External) contact

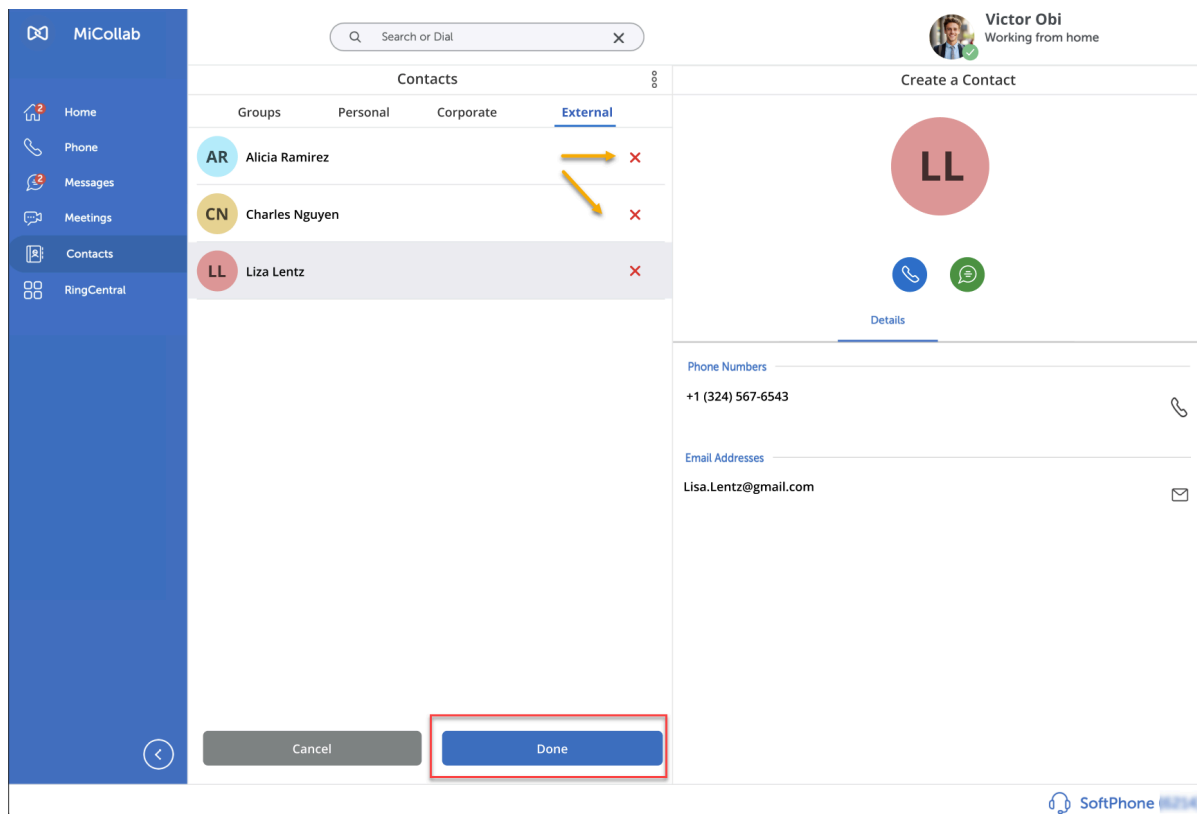
To delete the CloudLink contacts that are listed under the External contacts tab, perform the following:

1. In the **Contacts** menu, from the **External** contacts tab, click on the More menu.
2. From the more menu, click on **Delete Contacts**.




3. The delete icon () appears next to all the CloudLink contacts listed under the External tab. Select the contacts, delete them individually and click **Done**.

After you click on **Done**, a popup window will appear asking you to confirm your action.



Note:

While conducting an external contact search, deletion is restricted to CloudLink or Guest contact and not applicable to AD users. Therefore, in instances where a search yields results for both AD and CloudLink /

Guest contacts, the delete icon  will only appear for the CloudLink contacts, with no corresponding icon displayed for AD users.

To edit a contact from the Contacts card**Note:**

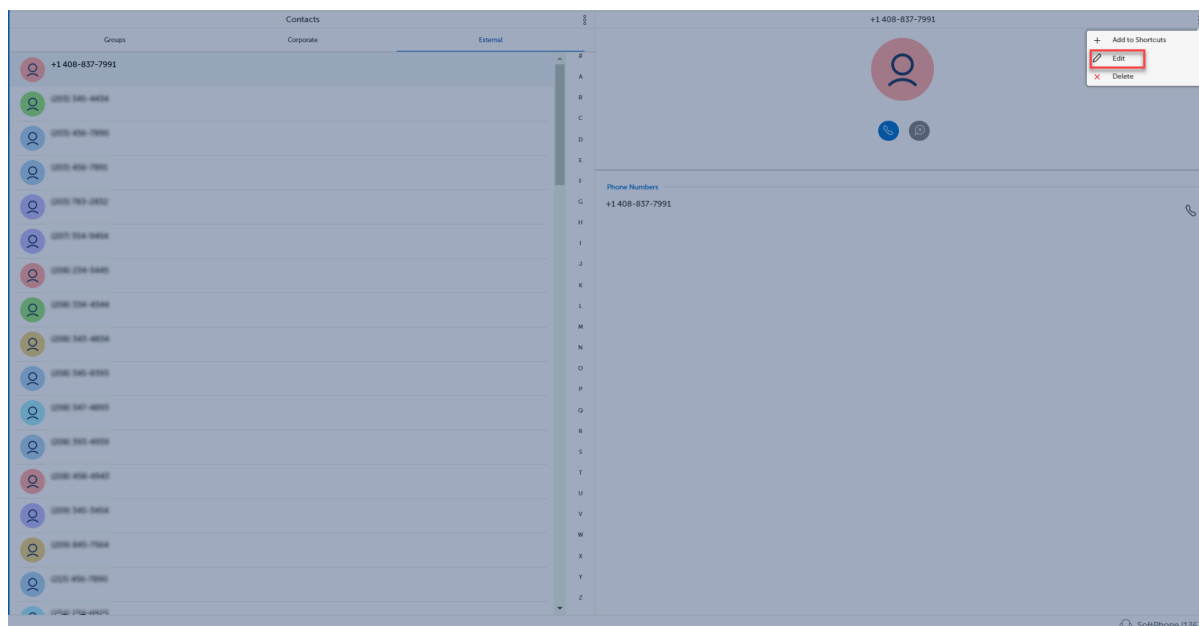
The more menu under the contact card has options to **Edit** , **Delete** and **Add to Shortcuts** options.

With the Edit option, you can only change or modify the name and the email ID of the contact. The phone number cannot be modified.

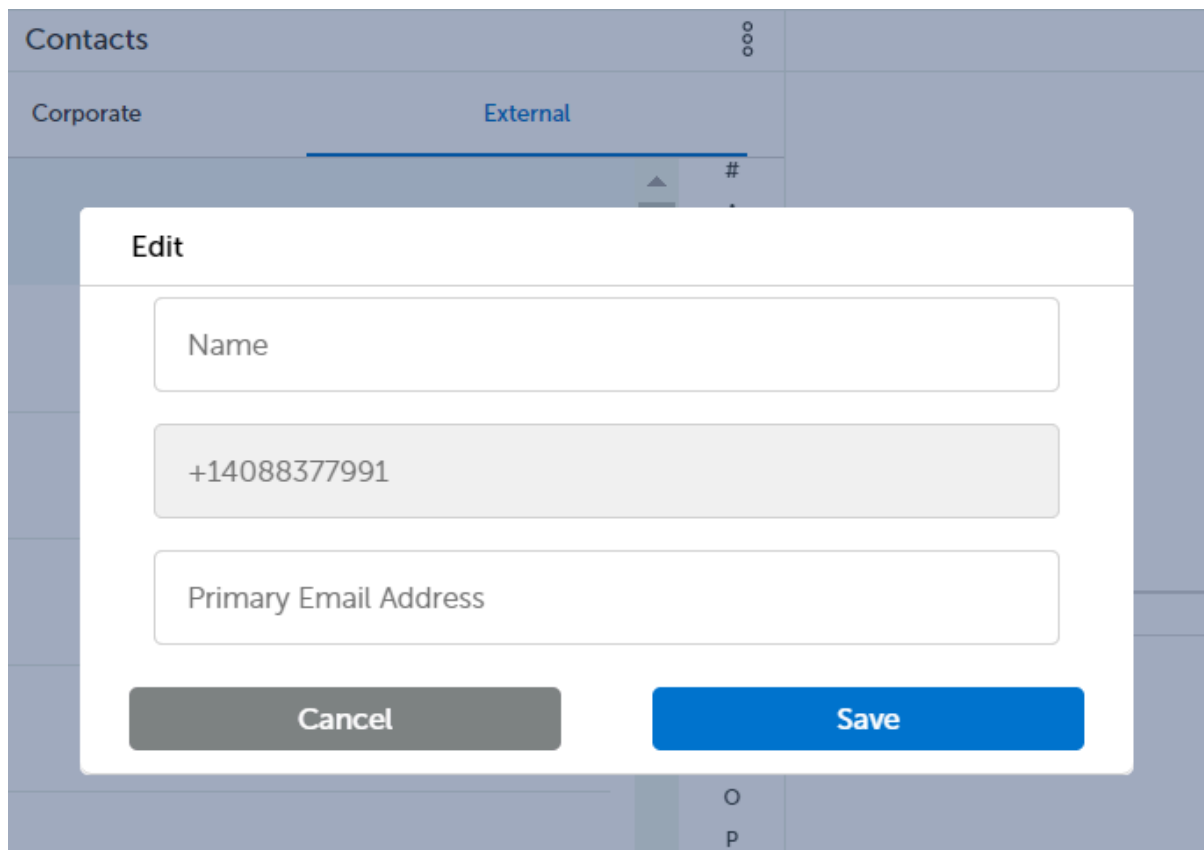
1. In the Contacts menu, from the External contacts tab, select one of the CloudLink contacts from the list of contacts.

The right pane will display detailed information about the selected contact.

2. From the top-right corner of the Contact card, select the **Edit** option from the More menu.



3. In the Edit window, modify the **Name** or the **Primary Email Address** fields and click **Save**.



The screenshot shows a web application interface for managing contacts. At the top, there's a 'Contacts' header with a menu icon. Below it, there are two tabs: 'Corporate' and 'External', with 'External' being the active tab. A modal window titled 'Edit' is open in the center. It contains three input fields: 'Name' (empty), a phone number field containing '+14088377991', and 'Primary Email Address' (empty). At the bottom of the modal, there are two buttons: 'Cancel' (grey) and 'Save' (blue). The background shows a list of contacts with columns for name, phone, and email, but it is partially obscured by the modal.

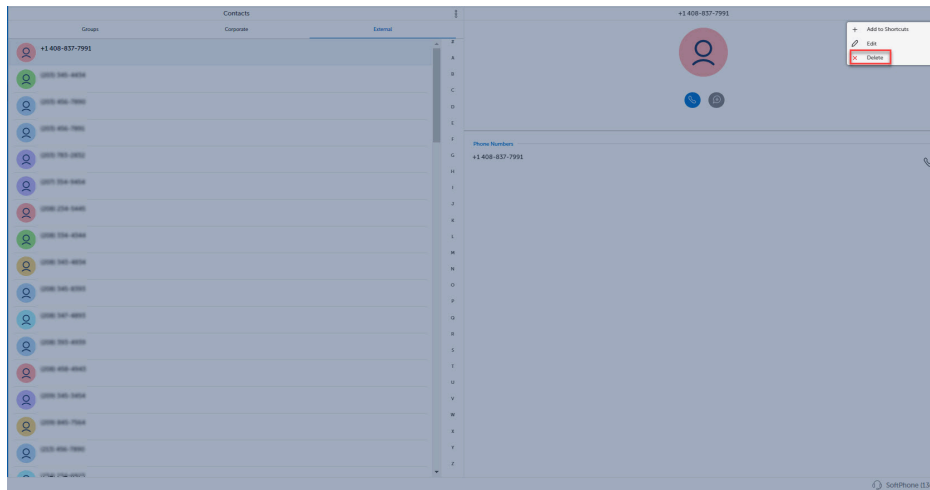
To delete a contact from the Contacts card

1. In the Contacts menu, from the External contacts tab, select one of the CloudLink contacts from the list of contacts.

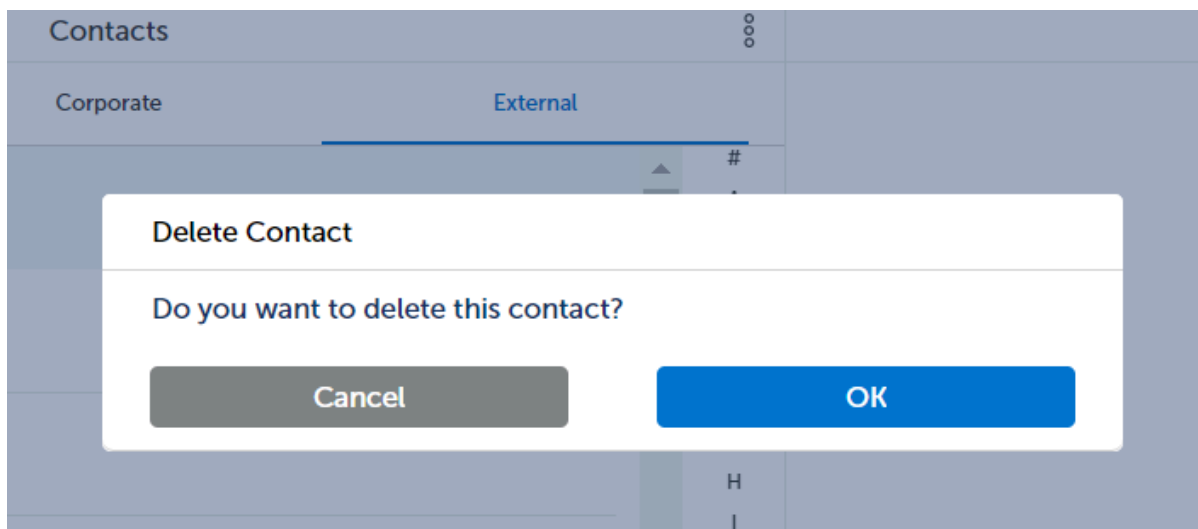
The right pane will display detailed information about the selected contact.

- From the top-right corner of the Contacts card, select the **Delete** option from the More menu.

The confirmation window opens.



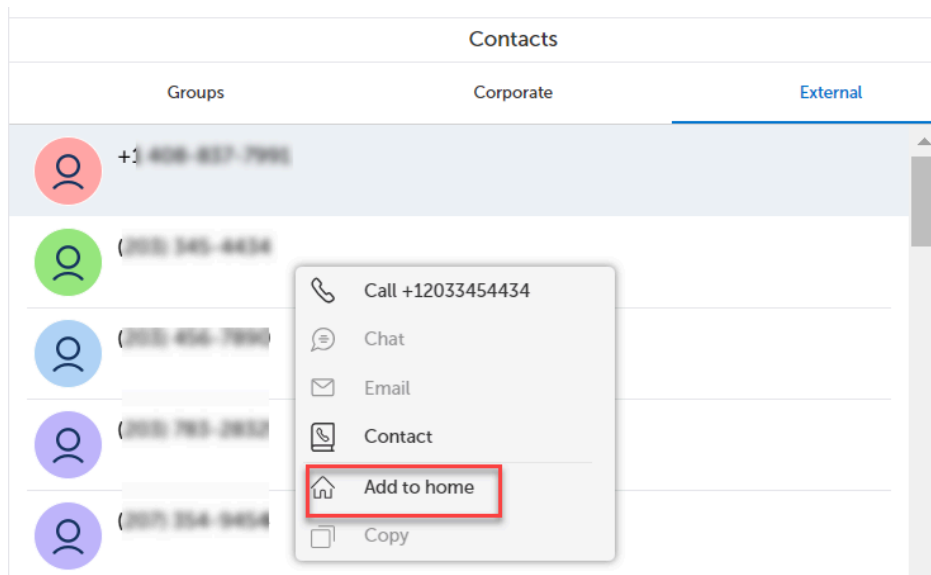
- Click **OK** to delete the contact details.



To add a contact as shortcuts on the home screen

- Open a contact name from the Contacts tab > External.

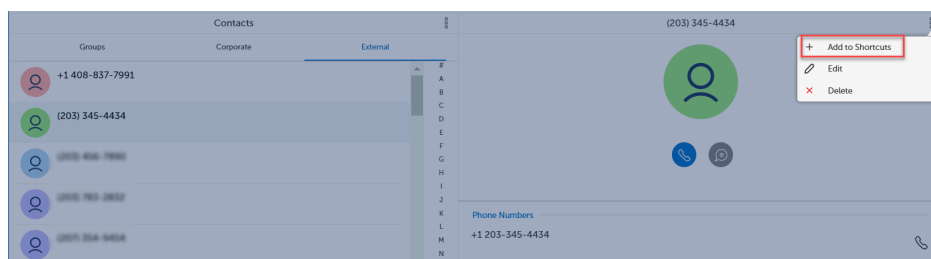
2. Right-click the contact name to open the context menu and select **Add to home**.



Note:
In the context menu, **Chat**, and **Copy** options are disabled (grayed out). The **Email** option would appear grayed out if the contact does not have an associated Email ID entered. The available options are **Call**, **Contact**, and **Add to home/Remove from home**.

OR

Click on the contact name to open the right pane. Open the more menu from the Contacts card, select **Add to Shortcuts**.

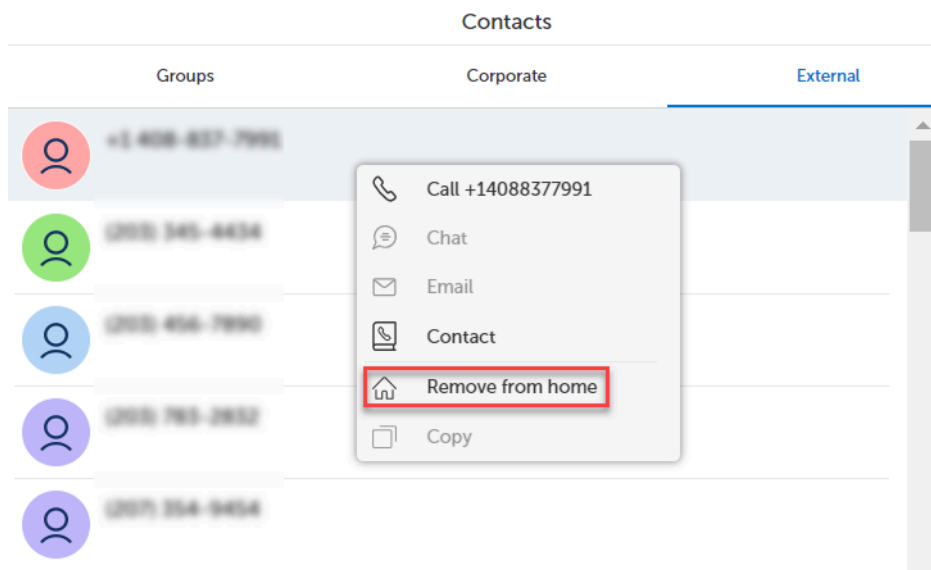
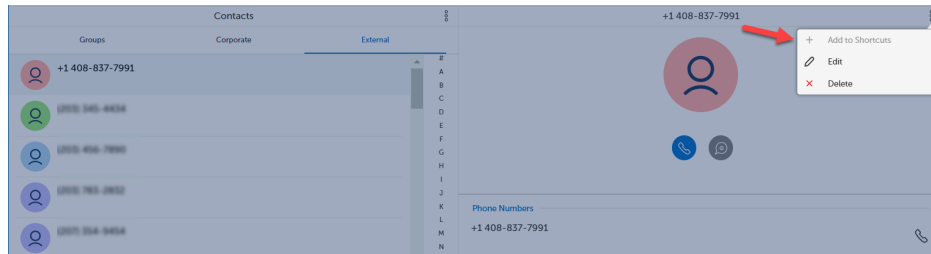


The contact gets added to the Home screen.



Note:

If the contact is already added to the Home screen, then the **Add to Shortcuts** option will be grayed out in the Contact's card and in the context menu, the **Add to home** will show as **Remove from home**.



General Rules for SMS

6

This topic outlines the general rules to be followed for the SMS feature.

Note:

Examples used below that include phone numbers, show numbers in North American format. The examples for numbers in other countries are the same, except the numbers will be in E.164 format.

- As an administrator, it's absolutely critical to prioritize data privacy when adding external contacts, including their names and numbers. This is an essential step for maintaining the confidentiality and security of the information available to MiCollab users.
- Duplicate Group Names are **not allowed**.
- It is **recommended** that Text Groups have unique names to reduce chances of duplicating group names or trying to reuse existing groups. Example of a good Text Group name: *Mrs Smith Grade 2 2024*
- Reusing existing Groups (that is, Group Name and Provider Number) will expose new members to previously sent messages.
 - Text group creators or SMS administrators are **recommended** to "Retire" Text Groups by removing the Provider Number and members, if the External Membership is changing.
 - If external membership is changing, it is **recommended** to create **new** groups (with new names and members) to ensure messages are sent to the correct audience. If new MiCollab members are added to existing groups, they will have access to older messages. New external participants will not receive previously sent messages unless someone sends them to the entire group again.
- If the SMS Administrator wants to be a member of the group, it is **recommended** that the user create that group from the **Text** tab.
 - This strategy ensures that the Creator of the group is added as a member of the group automatically.
 - The SMS Administrator (creating a group in the **Admin** tab) is not automatically added to the group upon creation. However, if the SMS Administrator adds their name during the initial creation process, the SMS Administrator user can participate in that group from their **Text** tab.
- SMS Administrators **CANNOT** add themselves to an existing group.
 - A member of a group can add the SMS Administrator user or any other member (internal or external) to the group if required.
- When creating a group, the system sends the following message to the creator of the group: "SMS Enabled. SMS messages will be sent/received using number <Provider Number>"
- Each addition or deletion of member(s) from a Text Group, results in a message being sent to the creator of the group as a confirmation of that request.
 - Example: (613) 123-1234 joined or (613) 123-1234 left.

- To "Retire" a Text group, an SMS Administrator deletes the Provider Number from the Text Group and all members from the group.
- Only an SMS Administrator can delete a provider number from a group. To delete a provider number, the SMS Administrator must first remove all external participants (and Save that change).
- Next, the administrator removes the provider number and makes any additional group changes like:
 - Removing MiCollab participants.
 - Changing the group name to indicate the retirement of the group.
 - The text administrator must press/click the **Save** button to commit those changes.
- The group remains under the **Admin** tab for SMS Administrators and remains in the **Text** tab for MiCollab participants who are still members. Example: If a MiCollab participant is removed from the group, the group no longer appears in the **Text** tab for the MiCollab member removed from the group.
- This optional management approach allows the SMS Administrator to maintain a history of the messages for that group while reducing clutter on the user's Text panel by removing the group from the users' text panels. This method provides a manner for archiving and retrieving messages. Note: As with all groups, the SMS Administrator cannot see the text messages (unless they remain or become a member of the retired group). If a "Retired" group has no members, SMS Administrators can add any MiCollab users to that group to review messages if required.
- Text Groups with the most recent activity appear at or near the top of the **Admin** tab. Over a period of time, *Retired* groups move down the **Admin** tab.

This chapter contains the following sections:

- [Enabling a Text Group for SMS \(via slash commands\) from the MiCollab Client](#)

This topic discusses the systematic process of identifying, diagnosing, and resolving problems in order to restore functionality and optimize the performance of the SMS feature in the MiCollab Client.

7.1 Enabling a Text Group for SMS (via slash commands) from the MiCollab Client

Enabling a Text Group for SMS (via slash commands) from the MiCollab Client



Note:

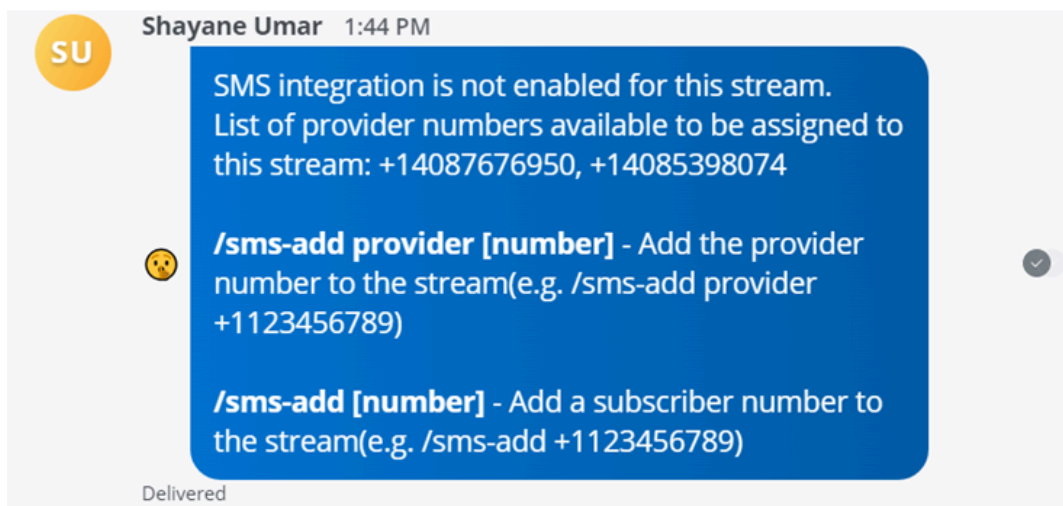
Slash commands serve as a troubleshooting tool, with Mitel Tech Support utilizing them for assistance. It has been suggested that Partner level technical support might find it imperative to implement these commands. Such directives are presumably necessary to address and resolve complex technical issues.

Following the activation of the SMS feature on the account, two additional commands become accessible within any text groups.

1. **sms-add command:** This command is accessible to all users and any MiCollab user can run it. It enables the users to add a provider number and one or more subscriber numbers to a given text group.
2. **sms-admin command:** This command is available to account administrators and *only* they can run it. It grants administrators the ability to manage SMS-enabled streams. This includes tasks such as adding or removing internal users and adding or removing subscriber numbers.

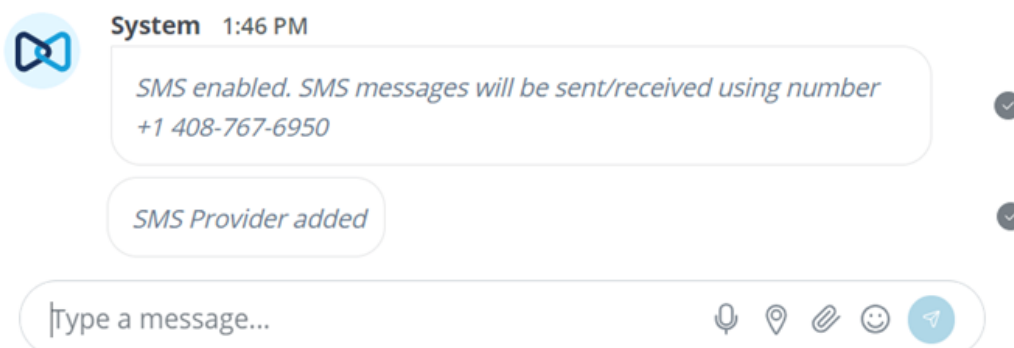
7.1.1 sms-add command

Available across all streams, this command serves to enable the SMS functionality. Any user within the text group has the privilege to execute this action. The users can establish a fresh text group for SMS capabilities or enable an already existing text group for SMS. Any user within the text group has the privilege to execute this action. To initiate the process, simply enter the `/sms-add` command in the text box without any parameters, which will prompt the display of a hint message within the text group, guiding through the procedure.



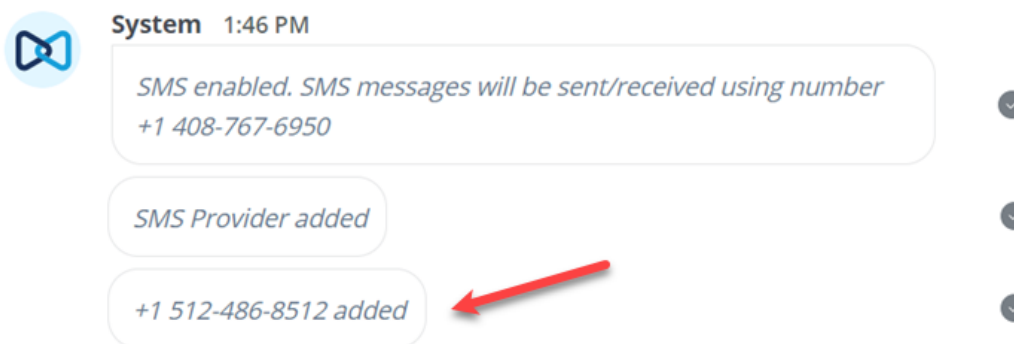
- **/sms-add provider <number>** – Use this command to add a provider number within the text group. This action will result in the text group being configured for SMS functionality.

For example: `/sms-add provider +14087676950`



- **/sms-add <number>**- Incorporating a subscriber number into the text group will associate the specified number with the text group.

For example: `/sms-add +15124868512`



Note: Provide all the parameters for the command within double quotes and ensure the phone number is in E.164 format.

7.1.2 sms-admin command

Used for the sole purpose of troubleshooting or debugging, the users will have the capability to perform this action on any text group. To begin the process, just enter the **/sms-admin** command with no additional parameters. This will trigger the appearance of a hint message in the text group, providing step-by-step guidance through the procedure.

Warning:

It is essential to restrict the assignment of the Account Administrator role to a selected group of trusted users. This limitation is crucial because those granted the Administrator role will possess the authority to remove users from the Accounts Console.

The full solution will explicitly deny Account Administrators access to the `/sms-admin` commands. Consequently, Partner Administrators will be responsible for individually enabling the new UX option, **SMS Admin** for users. This action will grant SMS Administrator access exclusively, without providing full Account Administrator privileges.



SMS Provider 2:19 PM

List of provider numbers available to be assigned:
+12057976304,+12058807272,+12059276030

/sms-admin list-streams - List all the sms enabled streams.

/sms-admin add-stream [provider] [stream] - Create new stream and add provider number(e.g. `/sms-admin add-stream "+1123456789" "Test flow"`).



/sms-admin add [username] [stream] - Add a user/subscriber number to the stream(e.g. `/sms-admin add "abc@example.com" "Test flow"` or `/sms-admin add "+1123456789" "Test flow"`).

/sms-admin remove [username] [stream] - Remove a user/subscriber number from the stream(e.g. `/sms-admin remove "abc@example.com" "Test flow"` or `/sms-admin remove "+1123456789" "Test flow"`).

- **/sms-admin list-streams** : This action will display a list of all the SMS-enabled streams.
- **/sms-admin add-stream [provider] [stream]**: Use this command to create an SMS-enabled stream

For example: `/sms-admin add-stream +12059276030 "SMS Flow 1"`

28 PM



SMS Flow 1 is created and SMS enabled. SMS messages will be sent/received using number (205) 927-6030

- **/sms-admin add [username] [stream]:** Use this command to add an external number or internal user to an SMS-enabled stream.

Adding an external number to an SMS-enabled stream

For Example: `/sms-admin add +15124868512 "SMS Flow 1"`



+1 512-486-8512 has been added to SMS Flow 1

Adding an internal user to an SMS-enabled stream

For example: `/sms-admin add "pxxxxx.sxxxxx@mitel.com" "SMS Flow 1"`



p[REDACTED].t.si[REDACTED]@mitel.com has been added to SMS Flow 1

In addition to using MiCollab's Edit Stream commands to remove participants from the SMS-enabled stream, an administrator can also issue the *remove* command as follows to remove a user.

- **/sms-admin remove [username] [stream]:** Use this command to remove an external number or internal user from an SMS-enabled stream.

Removing an external number from an SMS-enabled stream

For example: `/sms-admin remove "+15124868512" "SMS Flow 1"`



+1 512-486-8512 has been removed from SMS Flow 1

Removing an internal user from an SMS-enabled stream

For example `/sms-admin remove "pxxxxx.sxxx@mitel.com" "SMS Flow 1"`



p[REDACTED].t.si[REDACTED]@mitel.com has been removed from SMS Flow 1

Note: Provide all the parameters for the command within double quotes and ensure the phone number is in E.164 format.

