


x-bees Admin Guide

 This Guide explains x-bees requirements and licensing and describes how to activate HubSpot, Salesforce, Google and Microsoft 365 integrations.
Other x-bees documentation: [x-bees documentation](#).
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Requirements

- WMS version 6.01.20220621.2 and higher

Use the repository rel60 or rel60beta to install this version.

- The PBX must be on the x-bees licensing model in [Salesforce Partner Community](#)

Currently, there is no procedure for switching a PBX from the UC-licensing model to the x-bees-licensing, so it can be only done by the Wildix team. To check the requirements for switching, refer to the [Customer Care documentation](#).

 **NOTE:** access to Collaboration is also available for PBXs on the x-bees licensing plan!

- Make sure that these external servers are open on your router/ firewall:
 - <https://app.x-bees.com/>
 - <https://api.x-bees.com/>
 - <https://login.x-bees.com/>
 - <https://chat.wildix-chat.com/>
 - <https://conference.wildix.com/>
 - <https://auth.wildix.com/>

- <https://fs.wildix.com/>
 - <https://avatars.wildix.com/>
 - <https://cognito-idp.eu-central-1.amazonaws.com/>
 - <https://wda.wildix.com/>
 - <https://wda-ws.wildix.com/>
 - <https://wim.wildix.com/>
- Make sure Cloud Analytics is enabled in *WMS -> PBX -> Features* (it is activated by default if a PBX or whole WMS Network are running in the Cloud). It is required for correct work of user presence sync and CDR-View 2.0 in x-bees Analytics. For more details, see documentation [WMS Settings Menu - Admin Guide](#) (see the Features section).

Supported browser

- Chrome

Mobile apps

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

Chrome extension

- Download extension here: <https://chrome.google.com/webstore/detail/x-bees/olejekejhgimnlliplaiodgmbpcflhi>

x-bees certification

To be able to use x-bees internally or to offer it to customers, it is mandatory to complete x-bees Partner Program at e-Learning platform <https://e-learning.wildix.com/pages/32/certification-programs>.

After you get x-bees certification, you can order PBXs with x-bees licensing in [Salesforce Partner Community](#).

Licensing

Monthly/ Yearly licenses (3-year and 5-year commitment available):

Licensing model

Monthly/ Yearly licenses (also, 3 year- and 5 year commitment available)

xb-Device	xb-Basic	xb-Standard	xb-SuperBee
for unattended phones, W-AIR handset users, etc	for back-office staff, not customer-facing roles	for marketing, sales, support, customer care	for managers, supervisors
100 min 1 device, 2 calls Only a SIP account - No access to x-bees interface.	1000 min 10 devices, 4 calls Internal communication and external calls - Can't add guests to chats and meetings - No business integrations (Salesforce, HubSpot)	3000 min 10 devices, 8 calls Full-scale customer communication + Add guests to chats and meetings + Personal contact-me link, meeting scheduling link + Business Integrations (Salesforce, Hubspot...)	3000 min 10 devices, 8 calls Full-scale customer communication Add guests to chats and meetings Personal contact-me link Meeting scheduler Business Integrations (Salesforce, Hubspot...) + Analytics + Live view

Features	Guest (external users)	x-bees-Device (for unattended phones, W-AIR handset users etc)	x-bees-Basic (for back office staff who do not deal with customers)	x-bees-Standard (for sales people, customer support)	x-bees-SuperBee (for supervisors, managers)
Access to x-bees web and mobile	✓	—	✓	✓	✓
Max number of concurrent calls	—	2 calls	4 calls	8 calls	8 calls
Max number of assigned devices	—	1 device	10 devices	10 devices	10 devices
Free minutes for outbound calls*	—	100 min	1000 min	3000 min	3000 min
Free SMS*	—	—	50 messages	200 messages	200 messages
Colleagues search	—	—	✓	✓	✓
Colleagues view	—	—	✓	✓	✓

Features	Guest (external users)	x-bees-Device (for unattended phones, W-AIR handset users etc)	x-bees-Basic (for back office staff who do not deal with customers)	x-bees-Standard (for sales people, customer support)	x-bees-SuperBee (for supervisors, managers)
Favorites setup	—	—	✓	✓	✓
Inbound services (Contact center)	—	—	✓	✓	✓
Ability to create conversations	—	—	✓	✓	✓
Ability to write chats	✓	—	✓	✓	✓
Video conferences participation	✓	—	✓	✓	✓
Video conferences scheduling	—	—	✓	✓	✓
Ability to add guests to conversations	✓	—	—	✓	✓
Personal contact-me links (chat and scheduler)	—	—	—	✓	✓
Email signatures configuration	—	—	—	✓	✓
Calendars setup for meeting scheduling	—	—	—	✓	✓
CRM integrations (Salesforce, HubSpot etc)	—	—	—	✓	✓
Phonebook integration: search, add, edit contacts	—	—	✓	✓	✓
WhatsApp integration	—	—	—	✓	✓

Features	Guest (external users)	x-bees-Device (for unattended phones, W-AIR handset users etc)	x-bees-Basic (for back office staff who do not deal with customers)	x-bees-Standard (for sales people, customer support)	x-bees-SuperBee (for supervisors, managers)
Gong.io BI integration logging of events	—	—	—	✓	✓
Website widget agent	—	—	—	✓	✓
AI Assistant	—	—	—	✓	✓
AI Voice agents** and Chat agents	—	—	—	✓	✓
Transcription and summaries**	—	—	—	2 hours included	4 hours included
Sales Intelligence	—	—	—	—	✓
Website widgets configuration	—	—	—	—	✓
Live dashboard and Analytics	—	—	—	—	✓

The relevant subscription plan can be assigned to users via *WMS -> Users -> Edit user -> License type* field. See more in [PBX Licensing and Activation - Admin guide](#) (section "Assign correct subscription plan to each user").

* Free minutes to [Call Termination Area 1](#) and free SMS are available with the CLASSOUND service. Details on how to activate the service: [CLASSOUND Activation Request](#). Note that 2-way SMS are available in certain countries, check the list in [How to send and receive SMS/ MMS via CLASSOUND](#).

** In order to use AI Voice agents and have more Transcription and summaries hours, you need to purchase a dedicated AI+Data Boost Bundle. Check the documentation [AI+Data Boost Bundles Overview](#) for details.

Access for users and guests

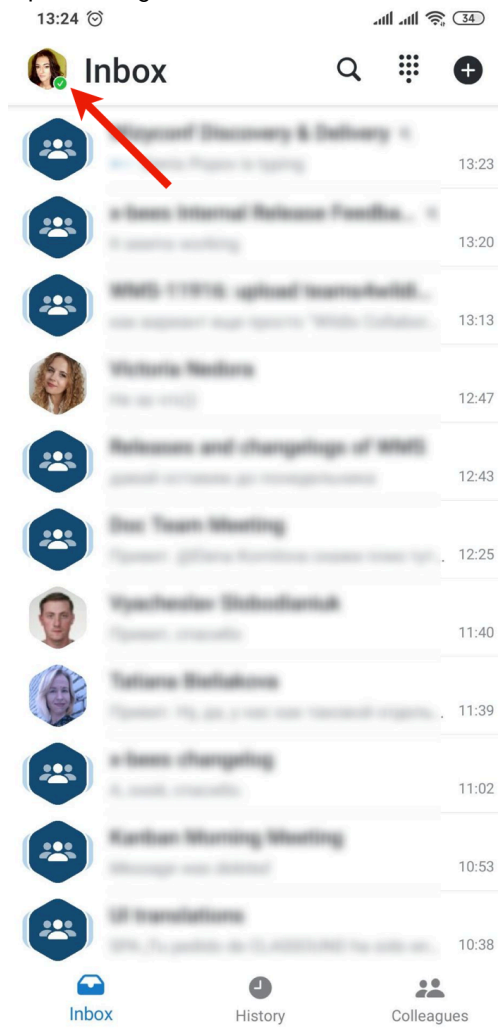
Mobile apps

Notes:

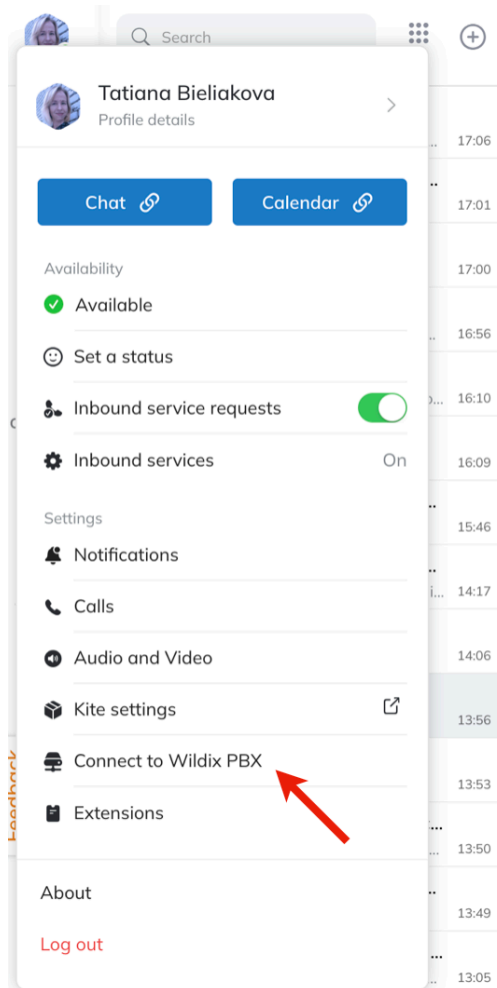
- x-bees mobile apps can be downloaded both by PBX users and guests
- x-bees mobile apps are available for users who are assigned an x-bees-Basic license or higher
- Guests have to be previously invited to a channel by a PBX user in order to be able to engage with them in conversations

Follow the steps below:

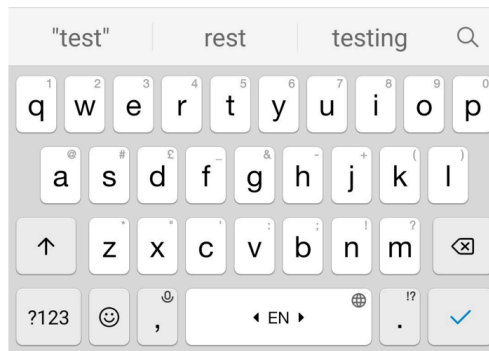
1. Download the x-bees app from [Apple store](#) or [Google Play Market](#)
2. Log in using your Microsoft 365 or Google SSO, or via email
 - In case of login via email, a verification code will be sent to your email address, you will need to enter it to log in
3. For PBX users only: follow the steps below to connect to your Wildix PBX
 - a. Click on your user picture to open *Settings*



- b. Under *Settings*, click **Connect to Wildix PBX**



c. Enter the domain name of your PBX into the input field and click **Connect**



⚠ Note: Guests who are not Wildix PBX users need to be invited to an x-bees channel by a PBX user to be able to engage with them in conversations.

Web access

From WMS:

- Go to *WMS* -> *Users*, select users and click **Invite to x-bees**
- Users receive an invitation via email with the link to join x-bees

Via the link:

Alternatively, PBX users can join x-bees following the steps below:

1. Open the link: <https://app.x-bees.com/>
2. Log in via Google or Microsoft 365 SSO, or by email
 - In case of login via email, a verification code will be sent to your email address, you will need to enter it to log in

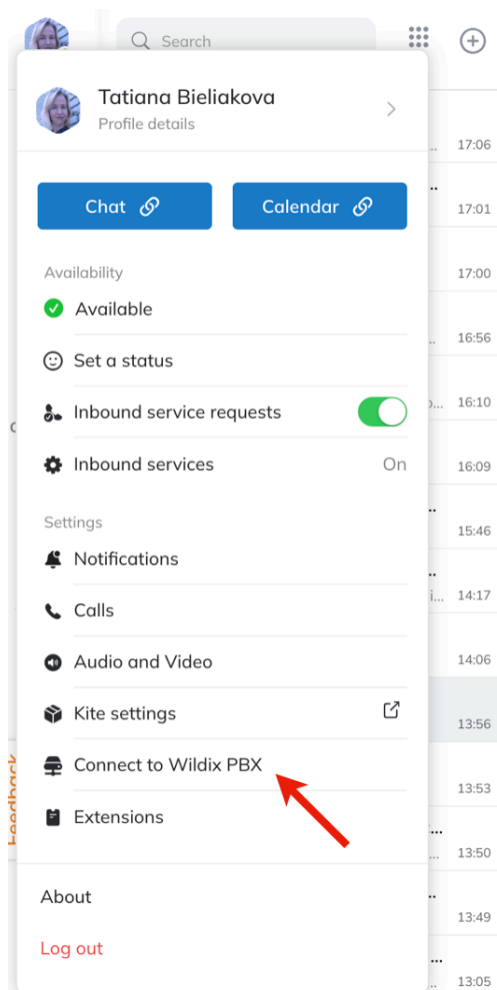
Note:

- In case user email was changed via WMS, user preserves access to x-bees conversations.

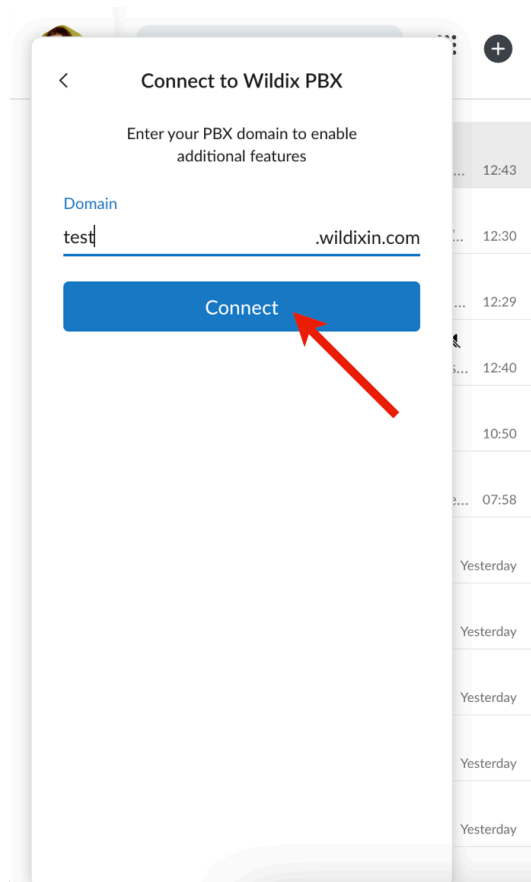
After email is changed, user gets logged out from x-bees and has to log in with the new email -> go to Settings -> connect to PBX -> log in again. In case of using an invitation link, connection to the PBX is performed automatically and conversations are available immediately, without relogin.

- In case user email changes after the user was moved to another PBX, access to conversations is not preserved.


3. Connect to the PBX:
 - a. Click on your user picture in the upper left-hand part of the screen to open *Settings*
 - b. Under *Settings*, click **Connect to Wildix PBX**



- c. Enter your Wildix PBX domain into the input field and click **Connect**



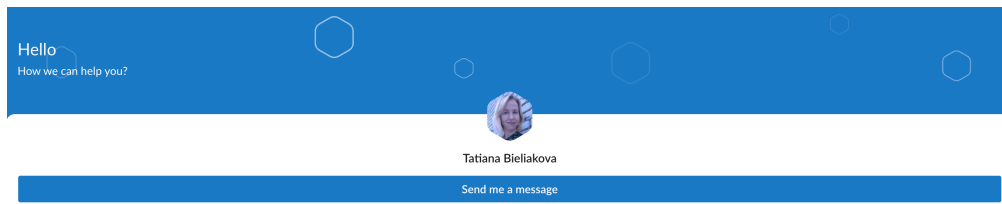
Direct link to contact an x-bees user

 Note: A customizable widget or contact-me button can be added to your website or embedded to your email signature, to enable customers to contact single agents or groups by clicking on a link. Documentation: [Website widget configuration](#).

Currently, you can create contact-me links and add them to your website or anywhere on the web, in the following format: <https://app.x-bees.com/kite/name.surname@yourdomain.com>, where name.surname@yourdomain.com is your email address.

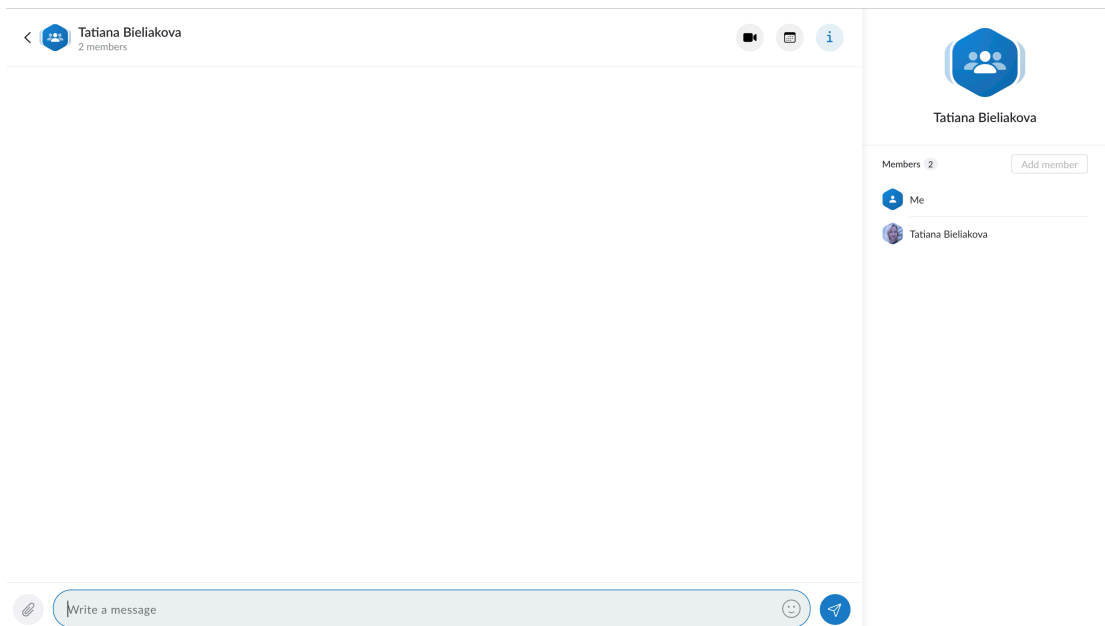
Here's an example of what happens if an external (non-authorized) user clicks on a link:

1. User clicks **Send me a message**

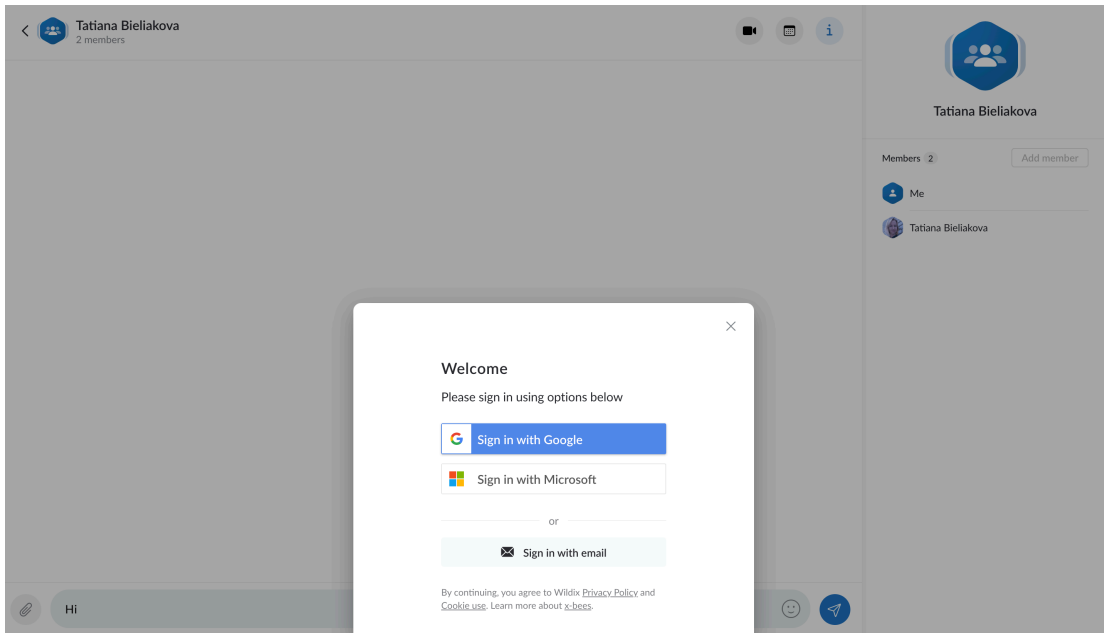


[Learn more about x-bees](#)

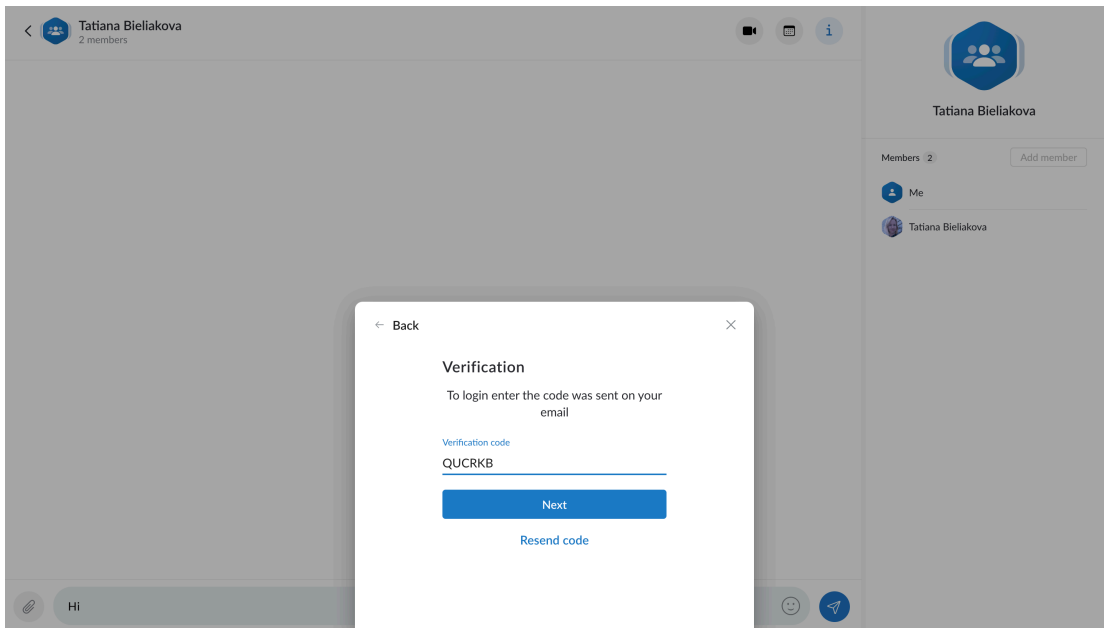
2. x-bees interface opens and user starts typing a message



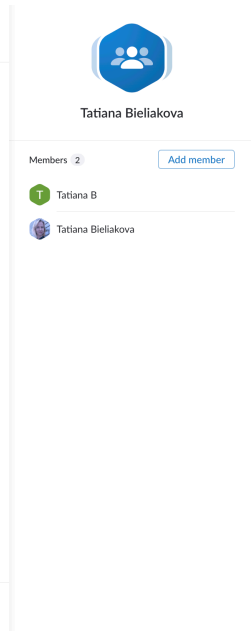
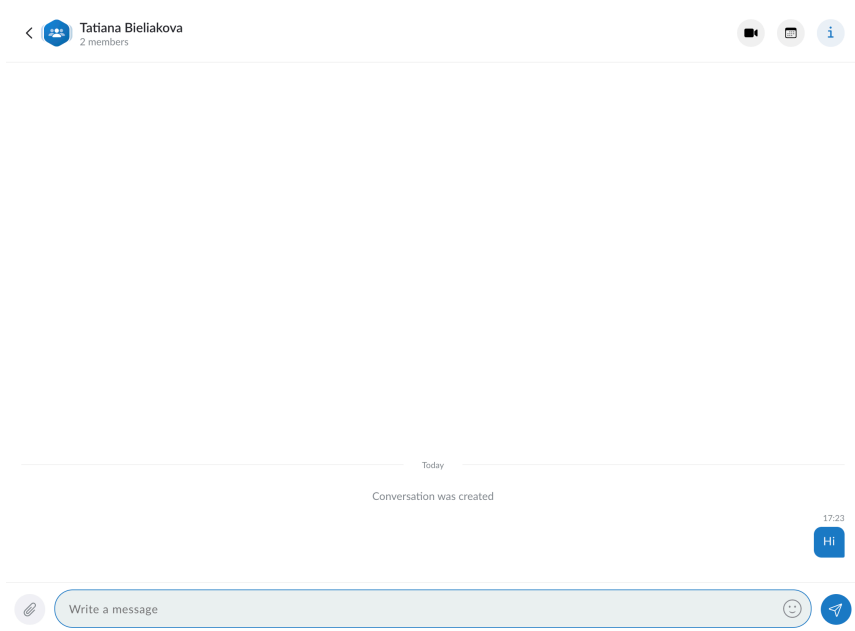
3. Authentication popup opens, requesting user to log in using Google/ Microsoft 365 SSO or email



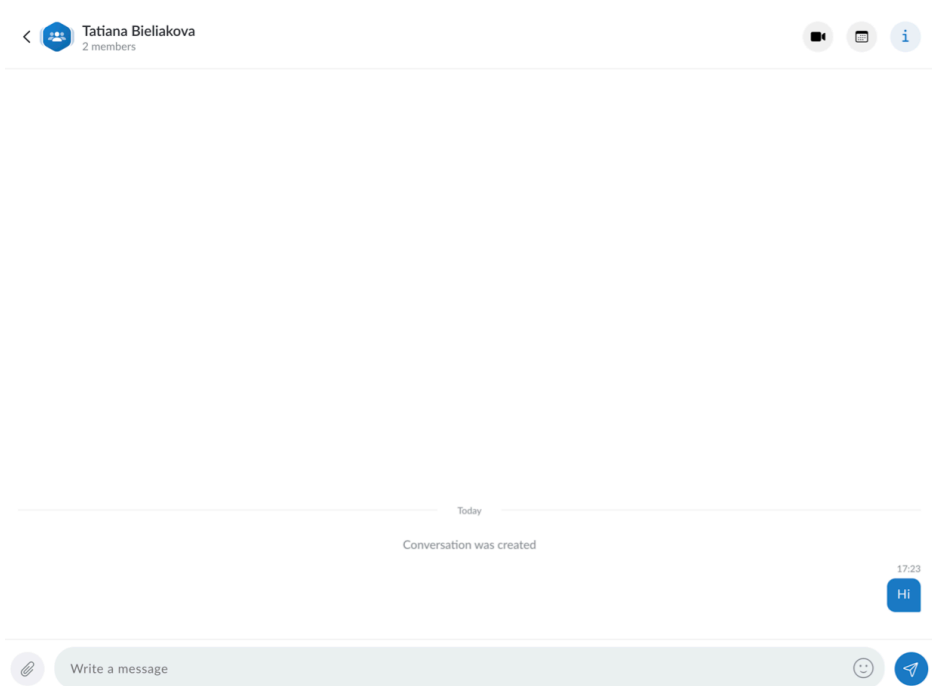
4. In case user chooses to log in via email, a code is sent to their email and they need to type it



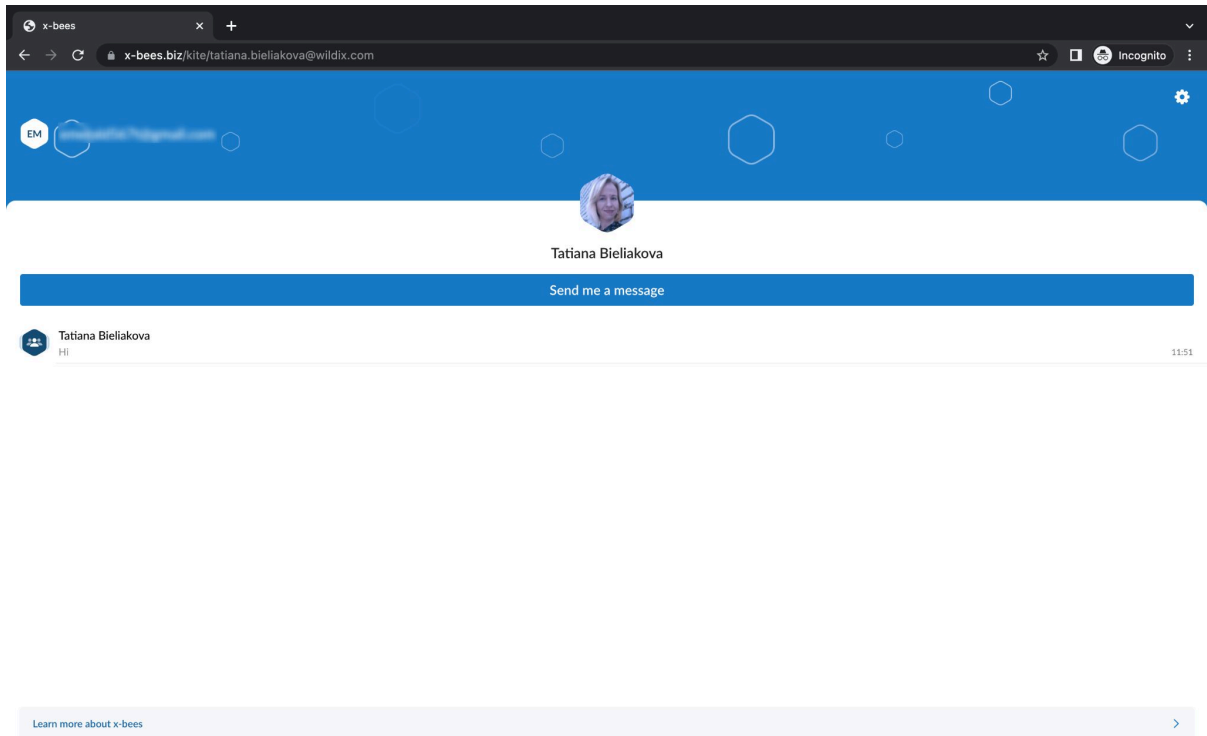
5. Now they can continue the conversation with the PBX user



External user can invite other members to the conversation by clicking the **Add member** button

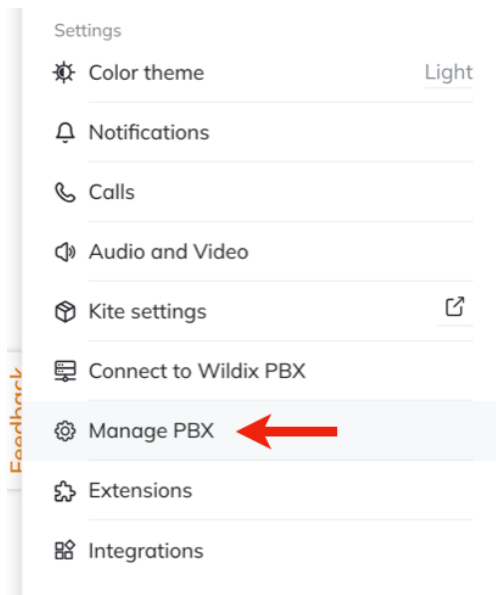


6. By clicking on the **Back arrow** next to the conversation icon from the top left-hand side of the screen, user can view all the previous conversations in which they were involved



Access WMS via x-bees

Admin users can access PBX, where you can set up integrations, manage users, etc. via x-bees *Settings* -> **Manage PBX** button:




For other users, this option is not displayed.

Integrations

Salesforce Integration

Salesforce integration with x-bees enables automatic logging of calls and conferences that take place on the Wildix system between users and Salesforce leads. On the x-bees side, users can find existing leads, create new Salesforce leads, view all previous interaction with them, create tasks, log activities, start a new conversation or schedule a call with them. Also, the integration allows to manage Salesforce Opportunities, track stages, view and edit notes and tasks, view and edit summary.

For requirements and installation, check the documentation [Salesforce Integration with x-bees – Admin Guide](#).

 For managing calls and contacts directly from Salesforce account, refer to a separate integration: [Salesforce Lightning Integration User Guide](#) (compatible only with Lightning).

Salesforce Partner Community Integration


Salesforce Partner Community integration with x-bees enables logging of calls between users and Salesforce leads. From x-bees, users can create new leads, search for leads, view previous interactions with them, create tasks, log activities, start a new conversation or schedule a call with the lead, as well as manage opportunities.

For requirements and installation, check out the document [How to activate Salesforce Partner Community integration with x-bees](#).

HubSpot Integration

HubSpot integration enables automatic logging of calls and conferences that take place on the Wildix system between users and HubSpot contacts. From x-bees, users can create new HubSpot contacts, find existing contacts, view all the previous interactions with them, create tasks, log activities, and start a new conversation or schedule a call with them.

For requirements and installation, check out the document [HubSpot Integration with x-bees – Admin Guide](#).

 For managing calls directly from HubSpot account, refer to a separate integration: [HubSpot Integration User Guide](#).

Microsoft 365 Integration

The integration allows customers to find Microsoft 365 contacts in Live and Dialpad search, view and open the latest emails with the contact via the Info frame in x-bees, both on web and in mobile apps.

For setup instructions, see the documentation [Microsoft 365 Integration with x-bees - Admin Guide](#).

Microsoft 365 Calendar Integration

Microsoft 365 integration allows customers to view available slots in the Microsoft 365 calendar of salespeople and schedule meetings with them from x-bees. The user's status is automatically updated in x-bees based on the events in the Microsoft 365 calendar.

For setup and requirements, check out the guide [How to activate Microsoft 365 Calendar Integration](#).

Google Calendar Integration

Google Calendar integration lets customers view available slots in the Google calendar of salespeople and schedule meetings with them from x-bees. Depending on the events in the Google calendar, the user's status gets automatically updated.

For requirements and activation, see the guide [How to activate Google Calendar Integration](#).

Google Workspace Integration

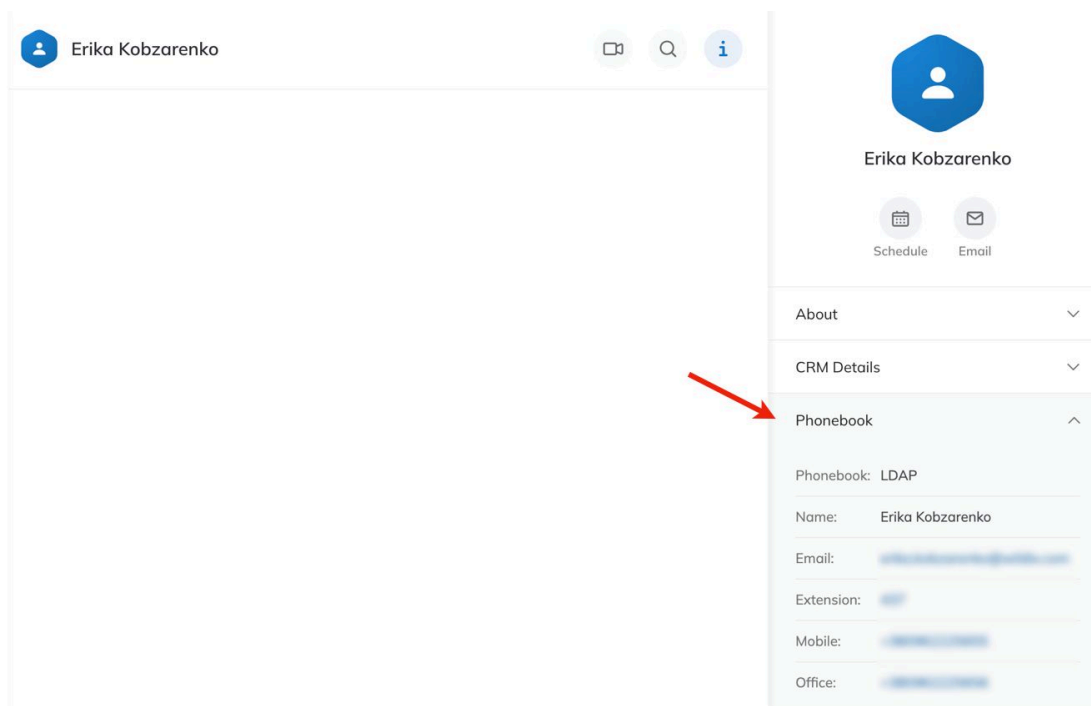
Integration with Google Workspace allows to view the current and upcoming events on the Info frame, create and edit contacts via x-bees and perform contacts search.

See activation instructions in the guide [How to activate Google Workspace Integration with x-bees](#).

Phonebook Integration

Phonebook integration is available starting from x-bees Web 1.32.1.543668 and WMS 6.03.20230630.3 or higher. The integration is enabled by default, in case of x-bees Basic licence or higher.

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



Phonebook section includes such fields as Name, email, mobile, address, etc., and lets to edit a contact or create a new one. In case of adding/ editing a phonebook contact via x-bees, the changes are synced with the Phonebook.

Webhook Integration

Also, there is possibility to set up Webhook integration with third-party web applications and services, which allows to send events related to calls.

For setup instructions and configuration example, check out the document [How to set up Webhook integration](#).

iFrame Integration

iFrame integration allows to configure integration with third-party applications and services and, if required, have the data displayed in the Info frame section in x-bees.

For setup instructions, check out the document [How to set up Client integrations](#).

Other

Allow calls to 911 extension via x-bees

By default, a call to 911 is redirected to a native dialler, due to being an emergency number in some countries. If, say, you have a user with 911 extension on the PBX and need to allow users to make calls to 911 extension, follow the instructions in this guide [Custom config parameters List](#).