



Crosswind Huddle

User Guide for Mac

V2.3



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Getting Started

This user guide is intended to provide instruction and reference for the Crosswind Huddle unified communications application, referred to as “**Huddle**”. This guide describes how to use the application on Windows or Mac. To use the softphone portion of Huddle, the computer or smartphone you are using it on must have a speaker/headset and a microphone.

Downloading the Huddle App

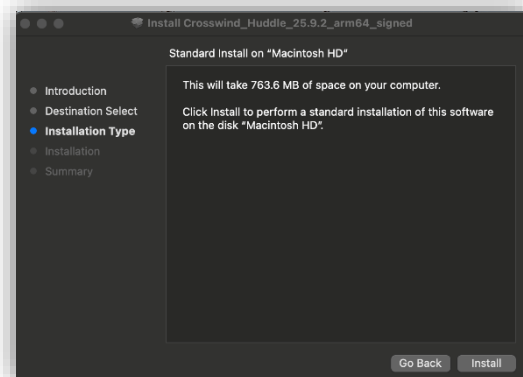
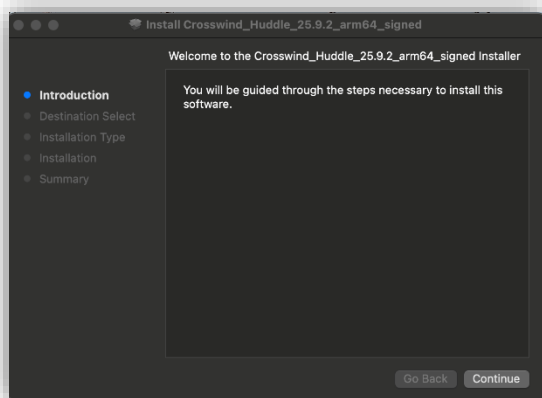
The latest release can be found in the Download Links section on the following website: <https://crosswindsupport.com/huddle>, or at the links below.

MAC Download:

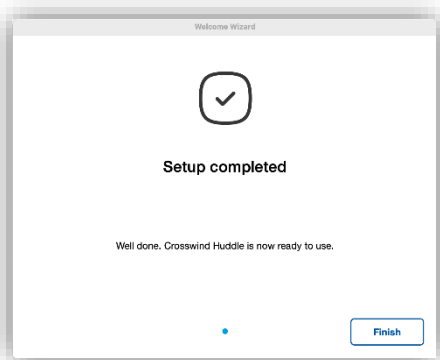
- Download the Intel Chip Version [HERE](#)
- Download the Apple Chip Version [HERE](#)

MAC Installation

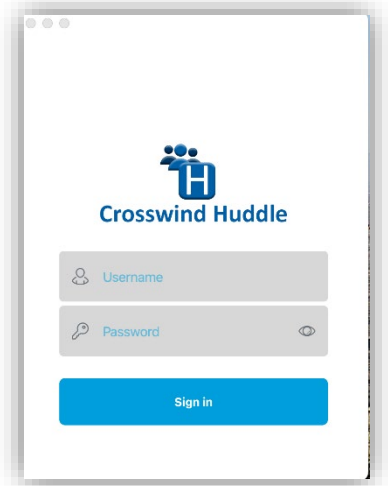
Run the downloaded **PKG** installer. Click **Continue** on the first screen. Click **Install** on the next screen. When prompted, enter your **password** or **fingerprint**.



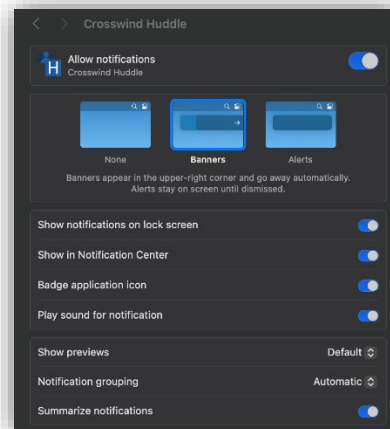
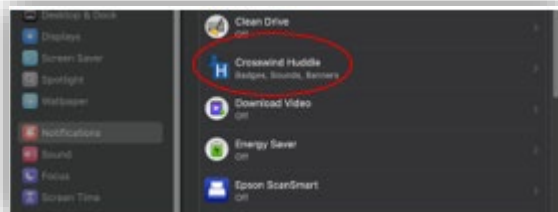
Once the installation has completed, the Huddle application will open. Enter the **Username** and **Password** you were provided and click **Sign In**. If you are not sure contact Crosswind Support.



Click **Finish** on the Setup completed screen.

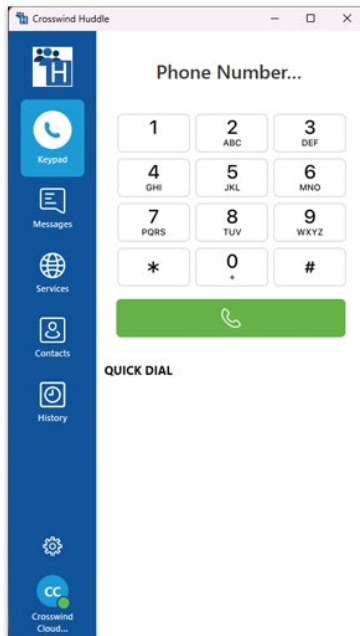


The last step will be to Enable Notifications. In the MAC OS Settings, go to Notifications. Select Crosswind Huddle. Adjust the settings that best suit you.

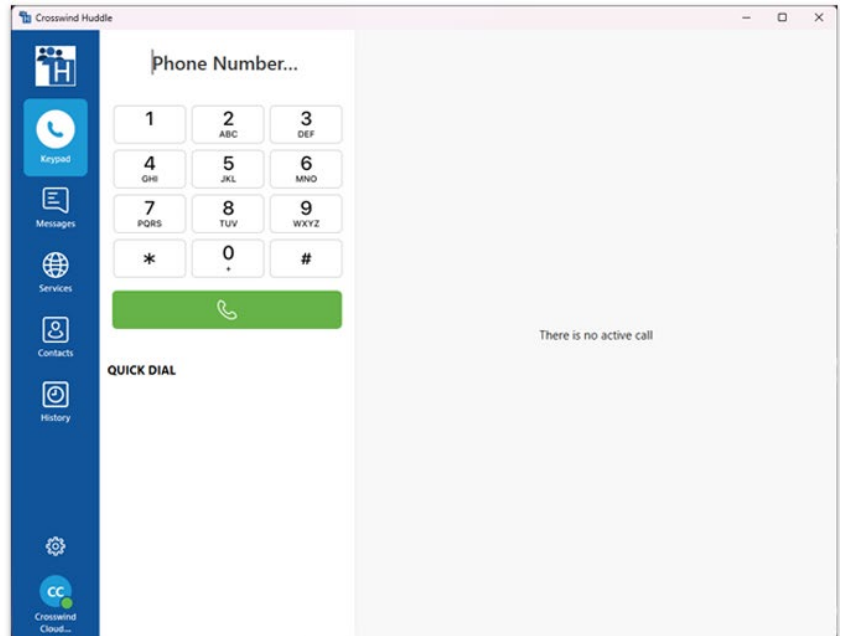


Welcome to Huddle

When the application loads the first time, it will be in compact mode. If you expand the window to the right, the information panel will load, which makes the application easier to use.



Compact Mode



Expanded Mode

Keypad (make and receive calls)

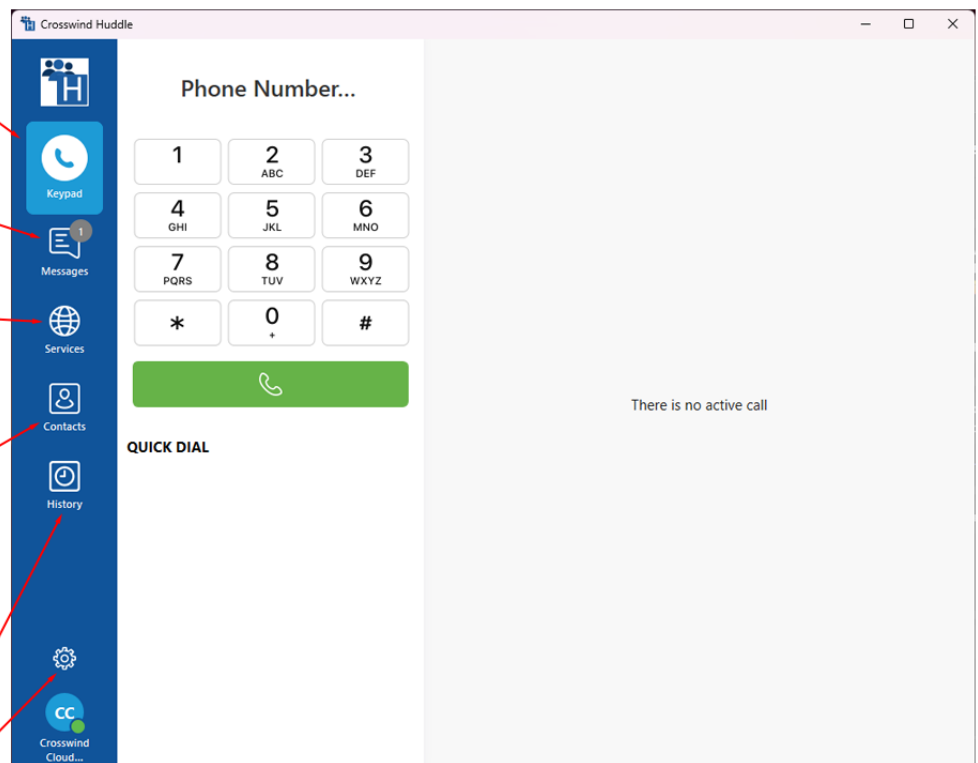
Instant Messages

Access Voicemails
Control your Call
FWD, DND, and
Pairing
Access SMS

Quick dial,
Office365, and
access to
Extensions

Call History

Settings





Keypad (Call Handling)

You can use Huddle to make and receive audio calls in addition to hosting conference calls. You can also transfer, forward, and record calls.

To use the Huddle softphone, your computer must have a speaker/headset and a microphone. You can set your Speaker and Microphone device by going to **Settings** -> **Sound** and then under the **Microphone** and **Speaker** sections click the drop-down and select the device you want to use.

How to place a call

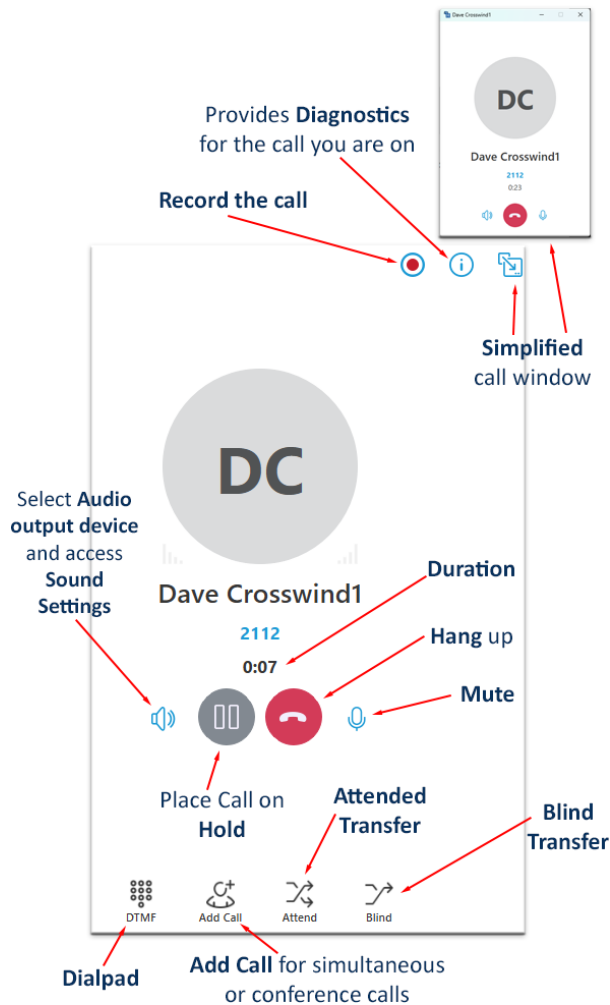
Calls can be placed using the **Keypad**, from the **Quick Dial** section, from **Contacts**, and from **Recents**.

Using the Keypad

To make a call using the Keypad, you can click on the number buttons, or in the “**Phone Number...**” section enter the extension or 10-digit external number you want to call and either click the **Green** call button or hit **ENTER**.



The call is placed, and the call window opens. Once answered see below for a description of the options you have while on a call.



The **DTMF** (Dialpad) Button: If you are calling a phone number that has a menu where you must enter digits, such as voicemail, you will hit the **DTMF** button, which will bring up a **DTMF keypad** for you to enter digits while on the call. To get back to the call window to end the call or perform some other call function, simply hit the **DTMF** button again to go back to the call window.



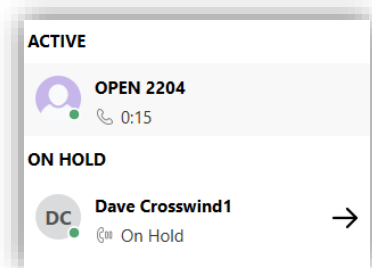
Ending a call

To end a call simply press the red **End Call** button.



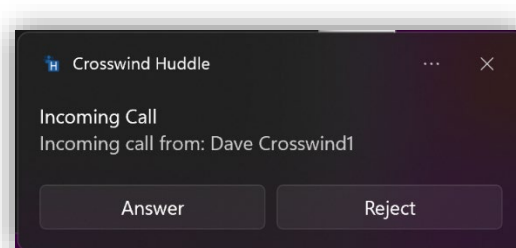
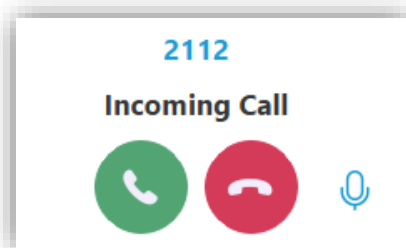
Making Simultaneous Calls

While on a call, you can make up to 2 additional calls simultaneously. To place a second call, you can use the keypad to dial the extension or external number. You can also place a call from the Contacts and Recent calls. You don't have to place the first call on hold; once you place the call, your first call will be placed on hold automatically. You can swap between the calls in the ACTIVE section by clicking on the call you want to resume and then click the **Resume** button.



Incoming Call Handling

To answer incoming calls, Huddle must be running. If it is not running, calls will go into voicemail, if configured, or ring until hung up. When you receive an incoming call, if not already in the foreground, Huddle will pop up and give the option to answer or reject the call. Depending on your Windows or Mac settings, you will also receive a Windows/Mac notification giving you the option to **Answer** or **Reject** the call. Clicking **Reject** will send the call to voicemail, if configured, or hang up on the caller.



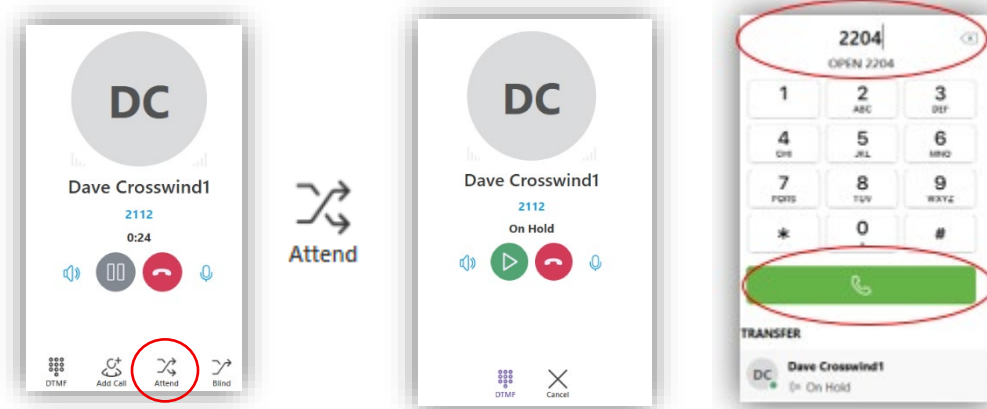
Note: To set the audio output device for the ringtone and adjust the ringtone volume, click [Settings -> Sound](#) and adjust the “**Ringtone audio output**”, “**Ringtone volume**”, and other settings as needed.

Transferring Calls

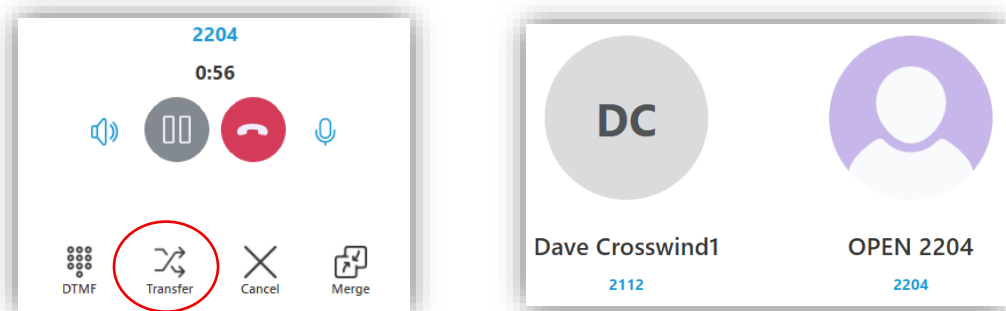
While on a call you can transfer the call using either the **Attended** or **Blind** transfer method.

An **Attended** call transfer allows you to speak to the party you are transferring the call to prior to completing the transfer. You also can pull the call back if you get the intended party’s voicemail or they do not answer.

To perform an **Attended** transfer, while on a call, click the **Attend** button. The caller is put on hold. You can now enter an extension or external number and click the **Green** call button or hit **ENTER**. You can also use the Quick Dial, Contacts, or Recents to make the call. To cancel the operation, click the Green resume button.



When the party you are transferring to answers, you can announce the call you are transferring and click **Transfer**. The call has been transferred to the other party.

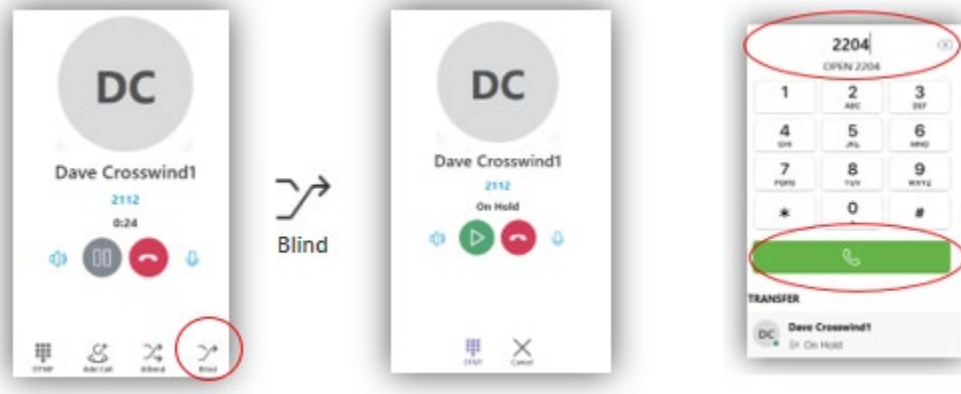


A **Blind** transfer immediately transfers the call to the party you are transferring to.

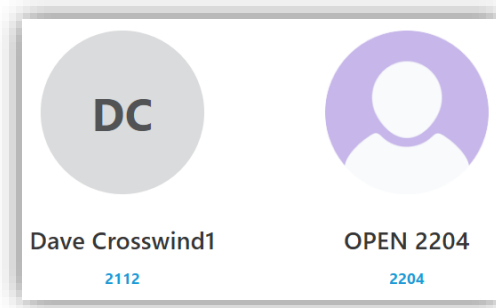
To perform a **Blind** transfer, while on a call, click the **Blind** button.



The caller is put on hold. You can now enter an extension or external number and click the **Green** call button or hit **ENTER**. You can also use the Quick Dial, Contacts, or Recents to make the call.

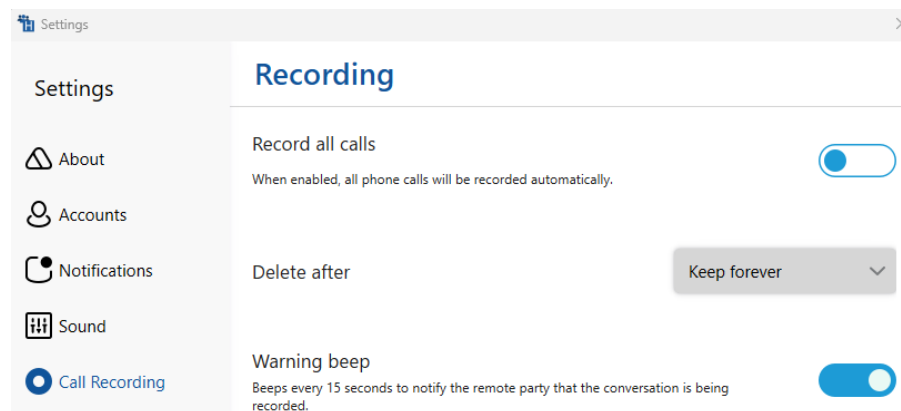


Once you click the **Green** call button or hit **ENTER**, the call is immediately transferred.



Recording Calls

You can record a call while on a call, or have all calls recorded. To record all calls, click **Settings** -> **Call Recording**, and then enable the option “**Record all calls**”. By default, this option is off.

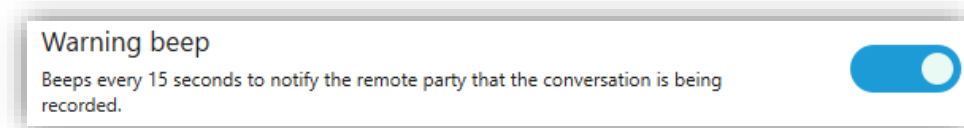


You can also set the retention (how long it will be kept for) of the recording by clicking the drop down next to “**Delete after**”.





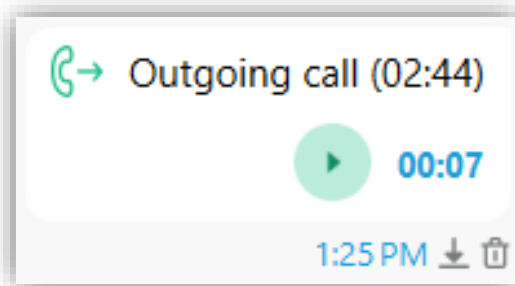
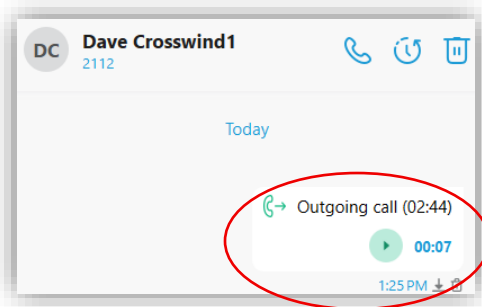
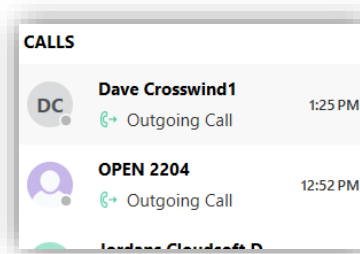
You can also turn off or on the **Warning beep** that notifies the remote party that the conversation is being recorded. By default, this warning beep is set to **On**.



To record a call while on the call, click the Record button at the top right-hand corner. The entire circle will turn **Red** while recording and you will hear a beep. Click the button again to stop recording.



To listen to and/or download the recording, click on **History**, then click the call that you recorded, and the recording will be in the information panel.



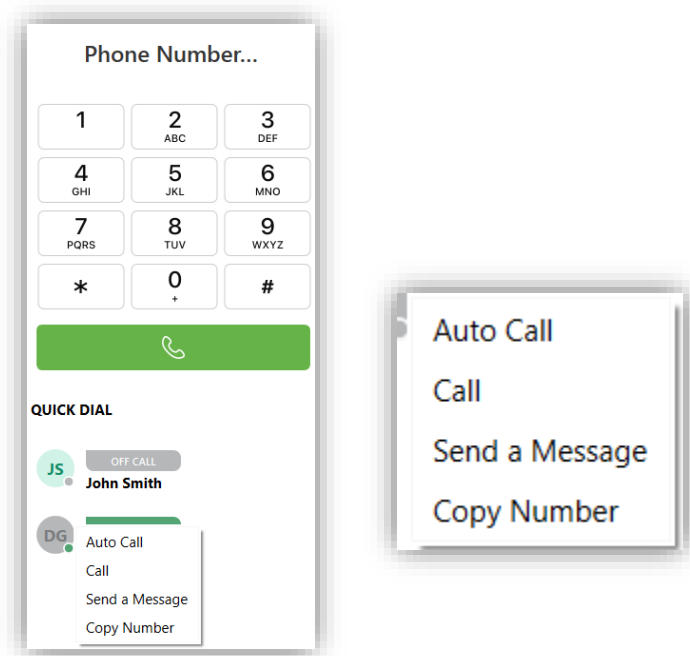
Click the **Play** button to play the recording.

Click the **Download** icon to download the recording to your computer.

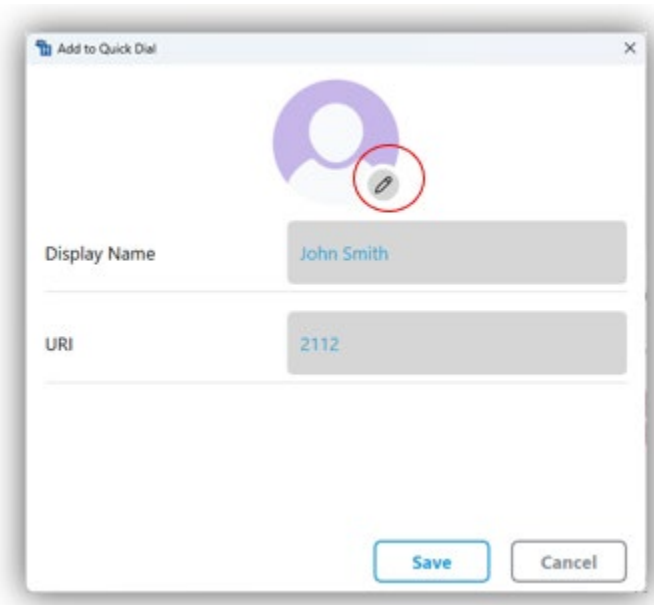
Click the **Delete** button to delete the recording.

Quick Dial

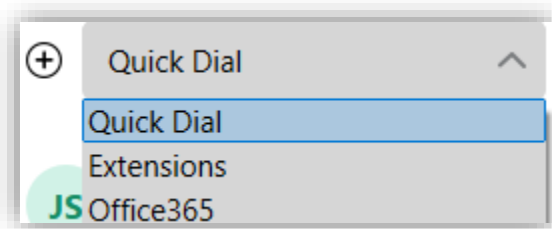
Quick Dial contacts let you easily call or Instant Message (*if applicable*) a contact from the Keypad screen. Any Contacts you add in Huddle become Quick Dial Contacts. To call one of your Quick Dial Contacts, click the contact and it will call them. You can also right-click the contact and click **Call** or you can **Send a Message** to chat with the person.



To add a **Quick Dial** contact, click on the **Contacts** button on the left side, then click the plus **+** at the top. Enter a **Display name** and in the **URI** section enter the extension or 10-digit external number and click **Save**. You can also add a picture or image for the contact by clicking the edit icon at the top.

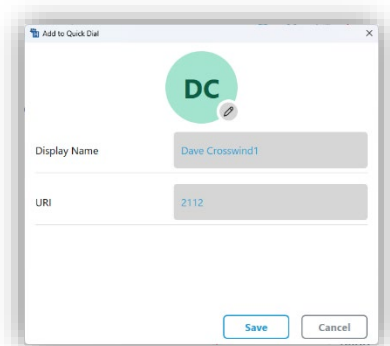
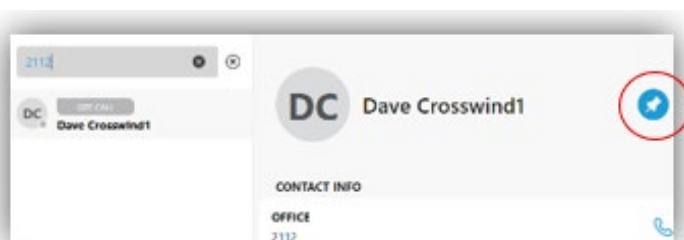


In addition to manually adding a contact, you can add a **Quick Dial** contact from the **Extensions** or **Office365** drop-down lists.



Extensions

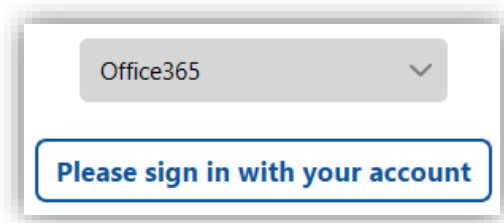
Search for and click on the extension you want to add to Contacts/Quick Dial. Click the **Blue** icon to add to Contacts/Quick Dial. The **Add to Quick Dial** window will appear, click **Save**.



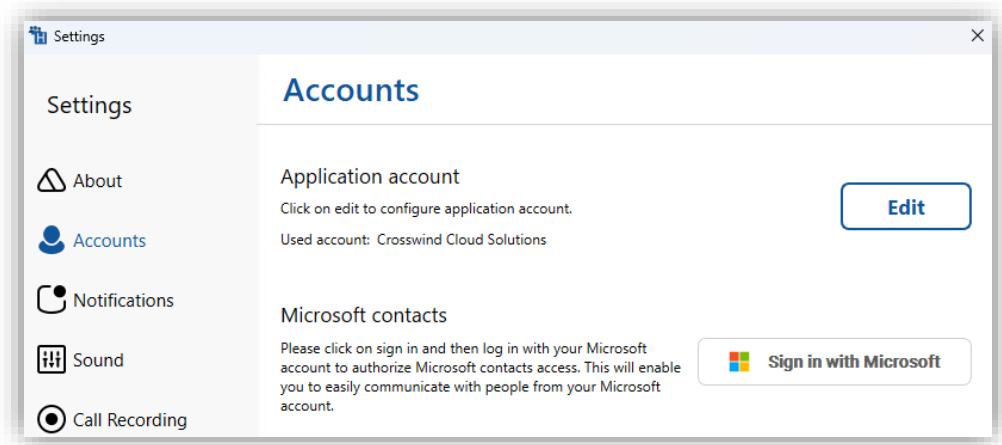
Office365

If not already signed in, click the **“Sign in with your account”** button after selecting **Office365**.



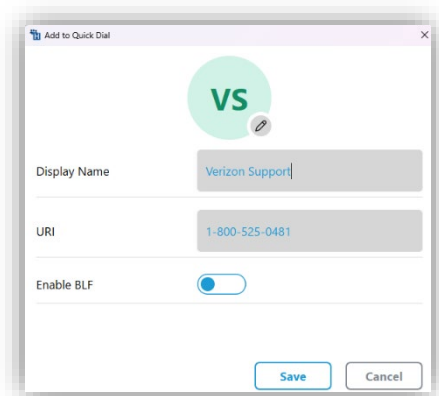
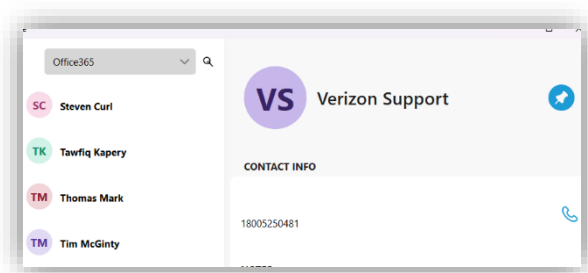


The Settings windows will open, click the **Sign in with Microsoft** button.

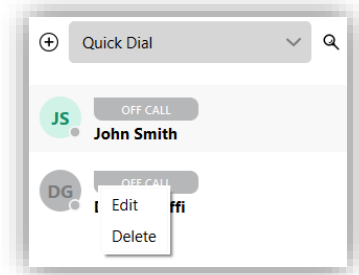


Log in with your **Office 365** account. Once completed you can close the Settings windows.

Search your Office 365 contacts and click on the one you want to add to Contacts/Quick Dial. Click the **Blue** icon to add to Contacts/Quick Dial. The **Contact add** window will appear, click **Save**.

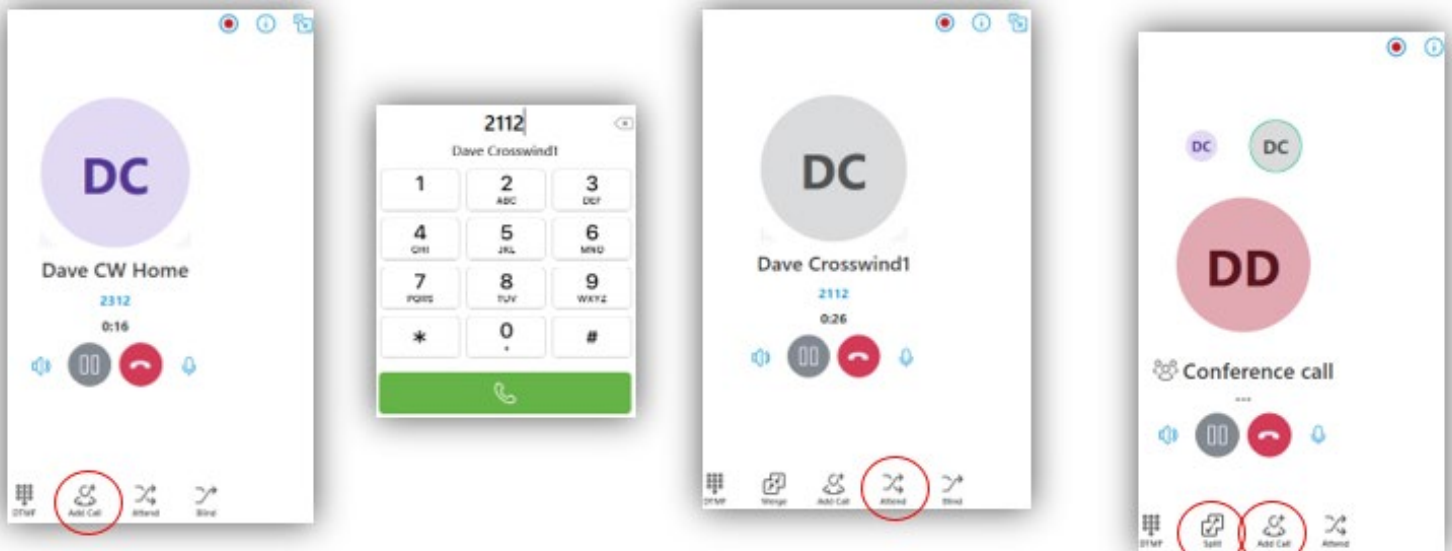


To **edit or delete Quick Dial contacts**, click on Contacts. In the Contacts screen, select Quick Dial if not already selected. Any Quick Dial contacts you added will be listed. Right click on the contact and select **Edit** or **Delete**.



Conference Calls

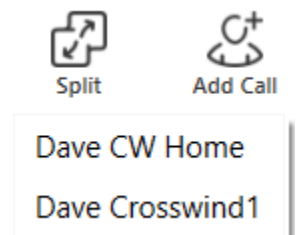
You can add up to 2 additional callers while on an existing call to create a **Conference Call**. While on your first call, click the **Add Call** button. You can use the keypad to dial the extension or external number, or you can also place a call from the **Contacts** or **Recent calls**. You don't have to place the first call on hold; once you place the call, your first call will be placed on hold automatically. Once the second call is answered, click the **Merge** button to create the Conference call.



To add another caller to the conference, follow the same process. Click the **Add Call** button. Call the next person and once they answer, click the **Merge** button.

To end the Conference Call for all callers, click the **Red** hang up button.

Click the **Split** button to end the Conference Call and split each party into separate calls. You will be presented with a list of the callers on the conference. The caller you select you will remain talking to, the other callers in the conference will be put on hold.



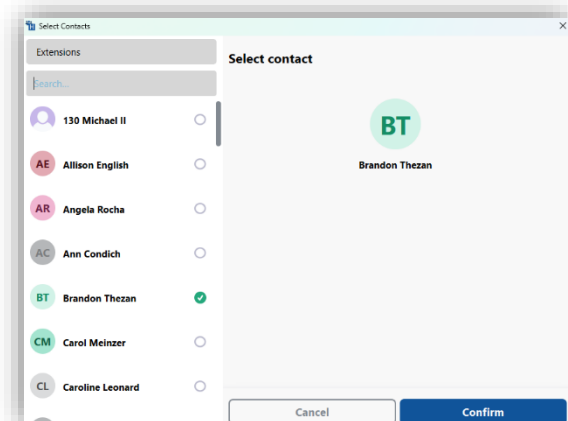
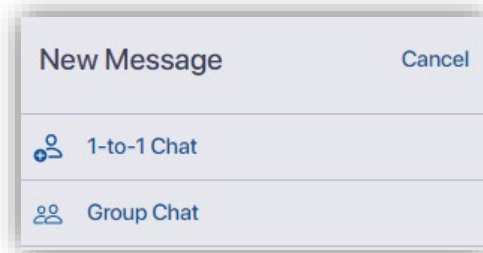
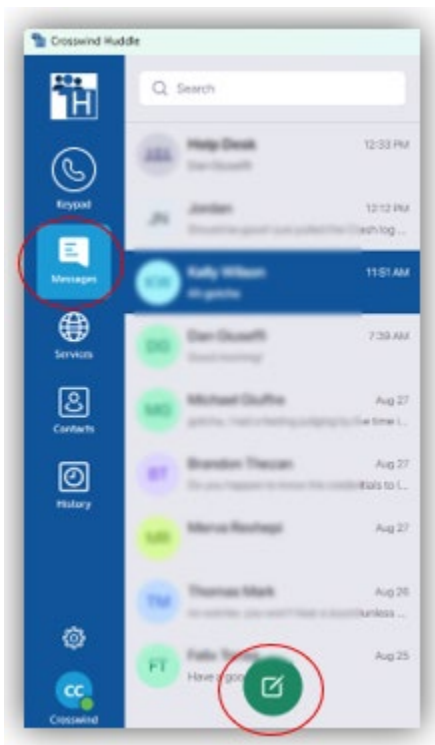



Messages

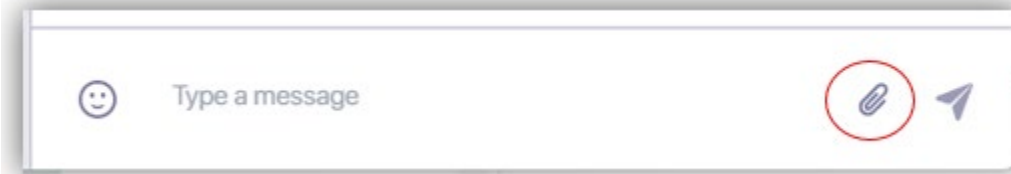
You can send Instant Messages with other Huddle users in your organization. In addition, you can send files and emojis. Click the Messages Icon on the left navigation bar. Anyone you recently chatted with will be listed in the Messages section

Sending Messages

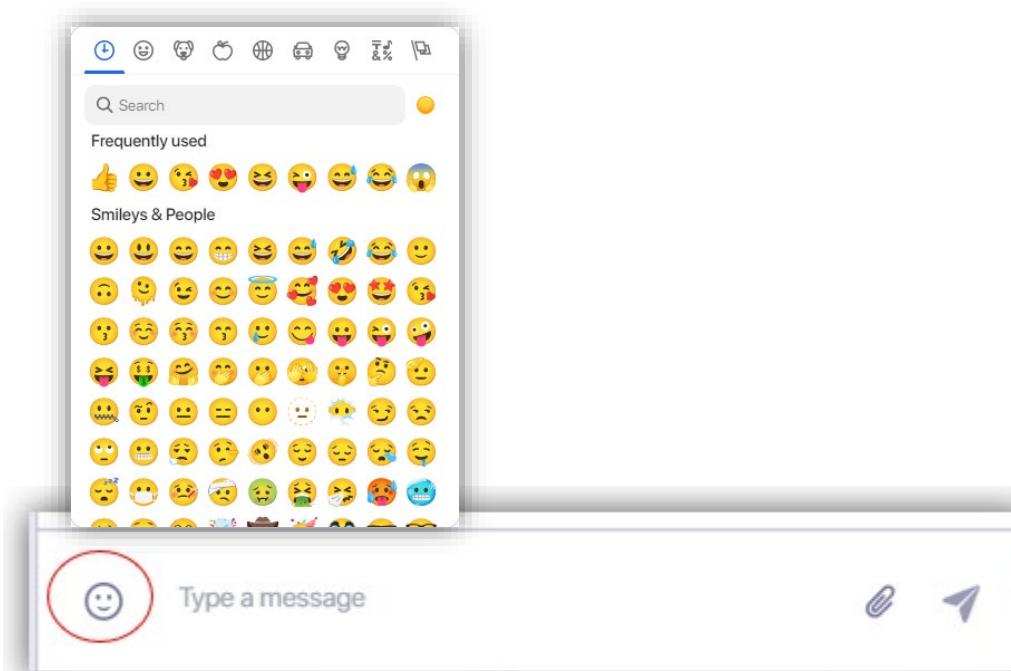
To send an instant message/chat click the Messages icon in the left navigation bar and then click the **Green** icon at the bottom. Next, to message one person select “**1-to-1 Chat**”. To message a group of people, click “**Group Chat**”. See the next section on how to create a group. After selecting “**1-to-1 Chat**”, the Select Contact window appears. Search for and click on the person you want to chat with and click Confirm. You can now send a **message**, **emoji**, or **file** to that person.



To send a file, click the Paperclip icon, select the file to send, and then click the send button. 



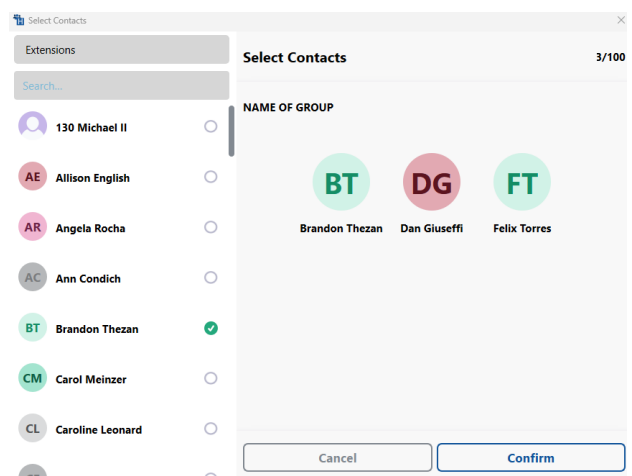
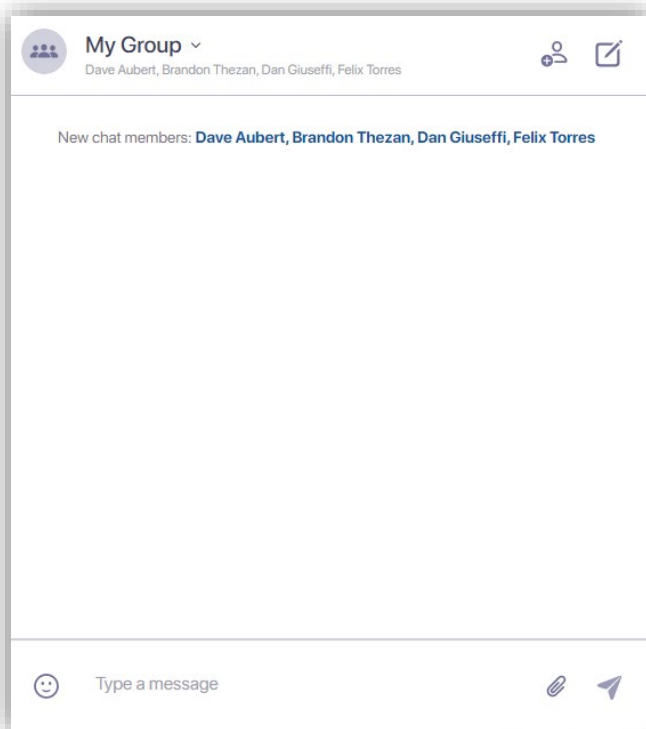
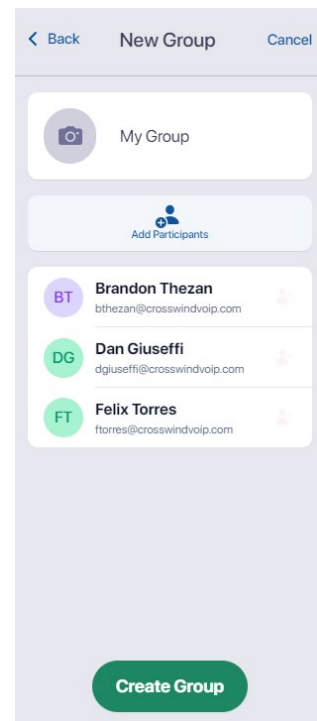
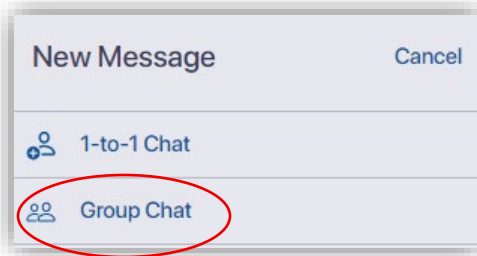
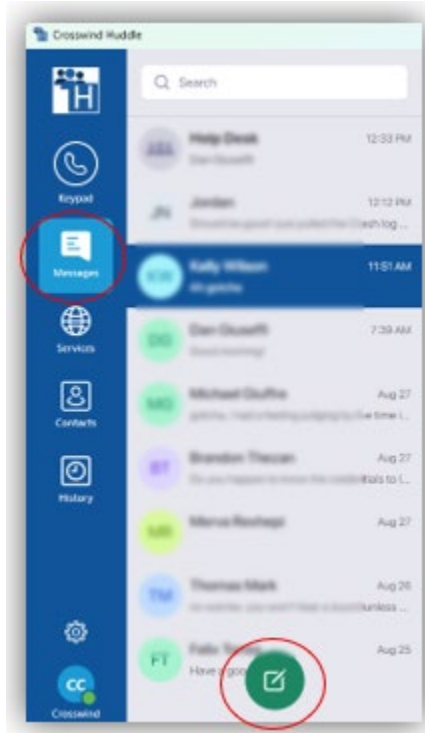
To send an emoji, click the **Emoji** (smiley face) icon and select the emoji(s) you want to send and click the **Green** send button or hit **enter**.



Group Chat

Up to 100 people can be added to a group chat. To start a group chat, click the **Messages** icon in the left navigation bar and then click the **Green** icon at the bottom. Click "**Group Chat**", enter a name for the group, add up to 100 participants, and then click **Create Group**.









Just like on a one-to-one chat, you can send messages, emojis, and files.

Presence

Anyone you have messaged or if you are messaging, you will be able to see their status of whether they have the Huddle application running or not. When you run the Huddle desktop application you are set to Online and appear **GREEN** to other users in the Messages screen. When Huddle is logged out, you will appear **GREY**. Additionally, you can manually set your status and 2 additional statuses **Busy** and **Away**. You would do this in the [Services](#) screen, described in the next section. See the table below for each status' color.

	Online
	Busy
	Away
	Offline



Services

The Services section allows you to access your voicemail messages, set and control your call forwarding, call pairing, and Do Not Disturb.

Huddle Presence

Click the drop-down menu next to **Huddle Status** to manually set your status. You can select **Busy** and **Away** in addition to **Online** which is set by default when you open the application. When you Log Out of Huddle, you will appear **Grey** to other users. Your status will be displayed to other users in the Messages section. See the table in the section above called [Presence](#) for each status' color.

Huddle Status: Online ▾				
Voicemail		Phone Settings		
New	Date	Time	CID Number	CID Name
New	09/02/2025	01:34pm	2112	Dave Crossw



Voicemail

The Voicemail section lets you listen to, Save, Delete, and download your voicemail messages.

Voicemail Phone Settings				
New	Date	Time	CID Number	CID Name
New	09/02/2025	01:34pm	2112	Dave Crossw

Double-click on the voice message you want to work with, and a small window will open and the message will start playing.

New

Date

New

09/02

▶ 0:03 / 0:16

🔊 ⋮

Save

Delete

Close

number

CID Name

2112

Dave Cross

The **Save** button will mark the message saved in the list of voicemails.

If you click the **Delete** button, a confirmation message will be displayed first that you will need to click Yes to, otherwise the message will not be deleted.

New	Date
Saved	09/02/2

Delete Message:
Are you sure you want to delete this message? This action cannot be undone.

No

Yes

If you click the **Close** button, the small window will close, and the message will still show **New**.

Phone Settings

The Phone Settings section of Services will allow you to control call forwarding (**Call FWD Number**), call pairing (**Pairing Number**), and Do Not Disturb (**DND Enabled**) for your extension.



The screenshot shows a settings window with two tabs: 'Voicemail' and 'Phone Settings'. The 'Phone Settings' tab is active. It contains three settings:

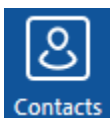
- Call FWD Number:** A checkbox labeled 'Enabled' is unchecked. Below it is an empty text input field.
- Pairing Number:** A checkbox labeled 'Enabled' is unchecked. Below it is an empty text input field.
- DND Enabled:** A checkbox labeled 'DND Enabled' is unchecked.

A blue button labeled 'Apply' is located at the bottom of the settings panel.

Call FWD Number: when call forwarding is enabled, calls to your extension will forward to the number you have specified. Please note if you do not answer the call, it will ring until the remote destination answers, like your cell phone’s voicemail. To enable Call Forwarding, enter the extension or external number you want to forward your calls to, check the box “**Enabled**” and click **Apply**.

Pairing Number: when call pairing is enabled, calls will ring your extension and the remote destination you specify at the same time. If you do not answer, the caller will go to your extension voicemail. To enable Call Pairing, enter the extension or external number you want to pair with, check the box “**Enable**” and click **Apply**.

DND Enabled (Do Not Disturb): When **DND** is enabled, any calls internally or externally will go directly to your voicemail, and forwarding and pairing is disregarded. Check the box and click **Apply** to set the extension in Do Not Disturb.



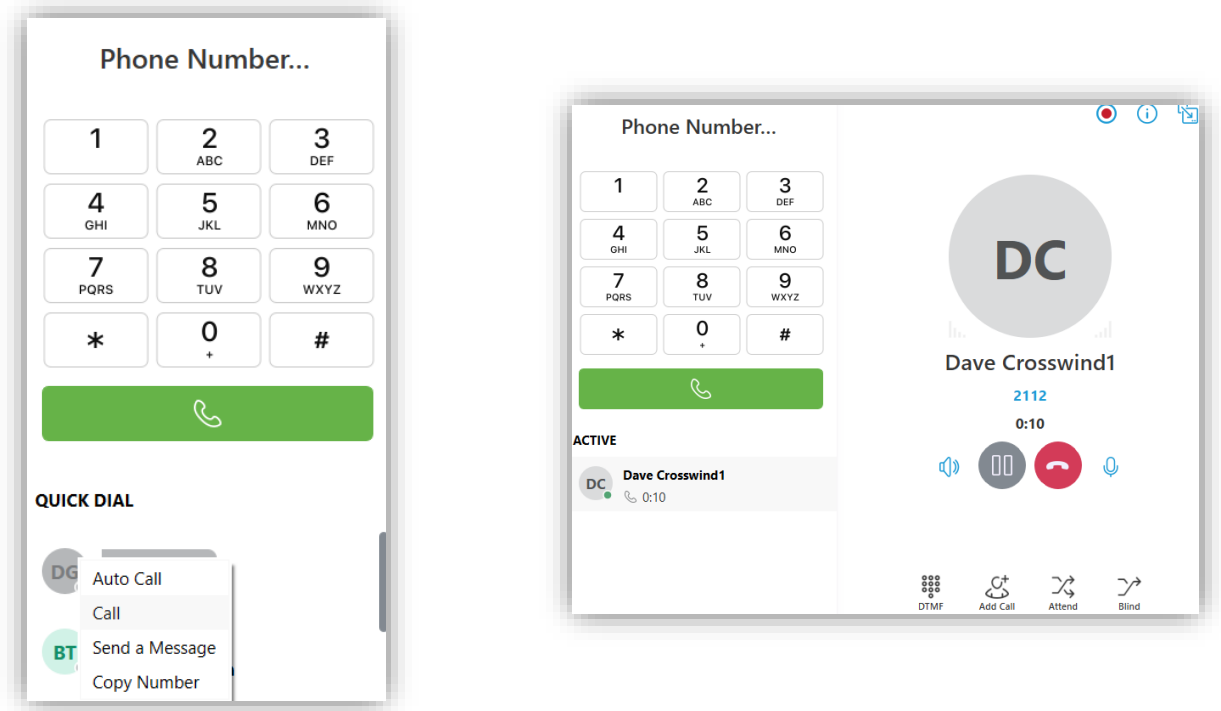
Contacts

The contacts section allows you to manage your Quick Dial contacts and access the Extensions for your organization. In addition, you can also access your Office 365 contacts. You can add contacts in either section to your Quick Dial contacts.

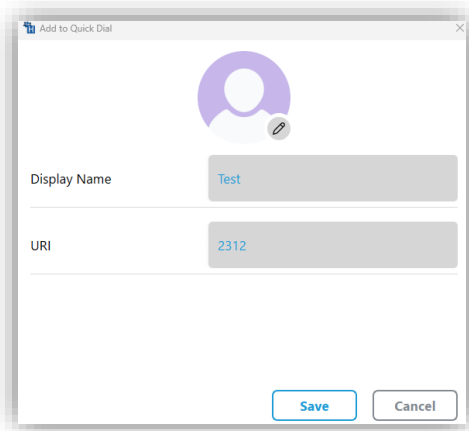
Quick Dial contacts let you easily call or Instant Message (*if applicable*) a contact from the Keypad screen. Any Contacts you add become Quick Dial Contacts. To call one of your



Quick Dial Contacts, click the contact and it will call them. You can also right-click the contact and click **Call**.

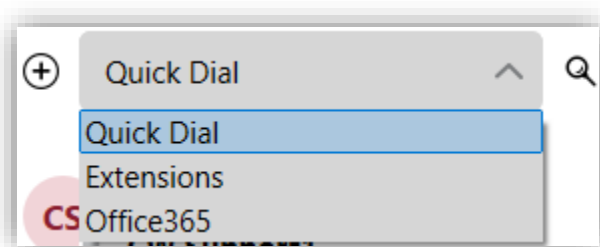


Add a Quick Dial Contact, click on the **Contacts** button on the left side, then click the plus **+** at the top. Enter a **Display name** and in the **URI** section enter the extension or 10-digit external number and click **Save**.

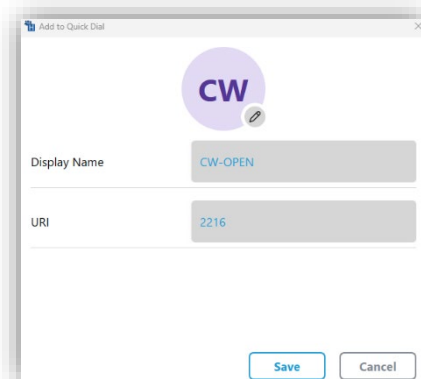
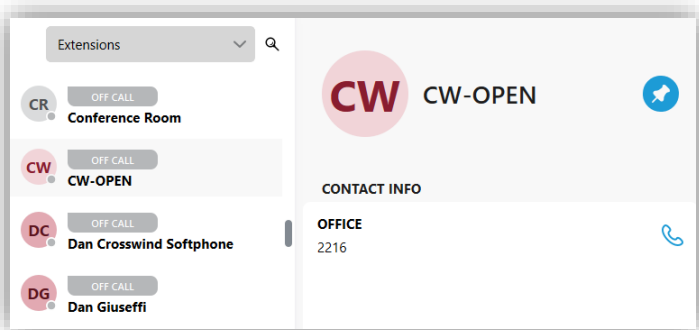


Extensions

You can add a contact from the **Extensions** or **Office365** drop-down lists. You can also use the **Extensions** or **Office365** lists to dial someone directly. Click the drop-down and select **Extensions**.



Search for and click on the extension you are looking for. To call the contact click the call icon. If applicable, you can also send an instant message. Click the **BLUE Pin** icon to add the contact to your Contacts/Quick Dial. The **Contact add** window will appear, click **Save**.

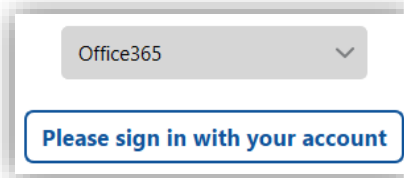


Office365

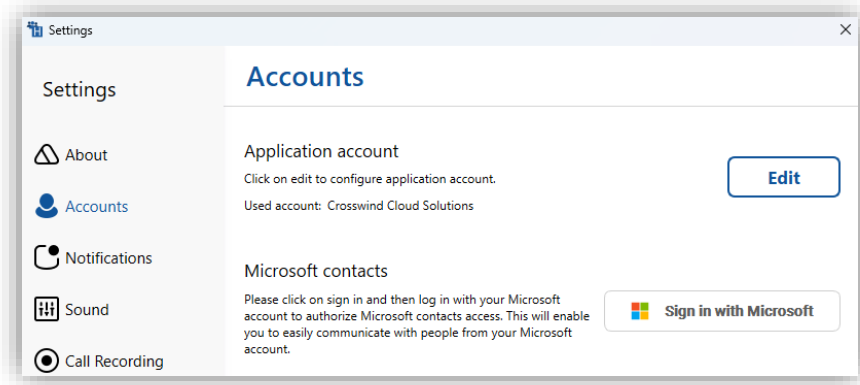
You can add a contact from the Extensions or Office365 drop-down lists. You can also use the Extensions or Office365 lists to dial someone directly. Click the drop-down and select **Office365**.

If not already signed in, click the *“Please Sign in with your account”* button after selecting **Office365**.



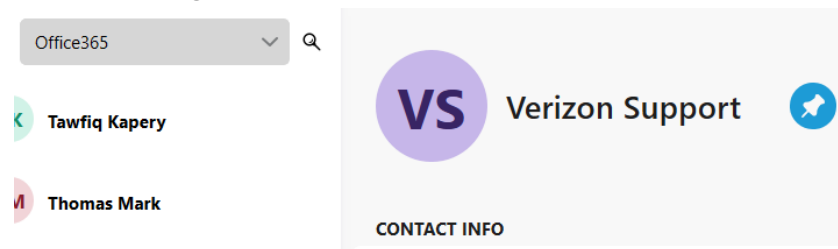


The Settings windows will open, click the **Sign in with Microsoft** button.

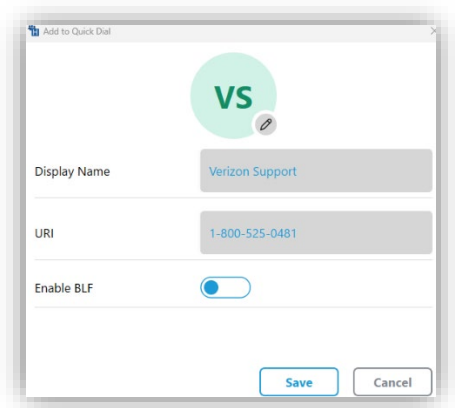


Log in with your **Office 365** account. Once completed you can close the Settings windows.

Search for and click the Office 365 contact and click on the one you want. To call the contact click the call icon. If applicable, you can also send an instant message. Click the **BLUE Pin** icon to add to Contacts/Quick Dial.




The **Contact add** window will appear, click **Save**.

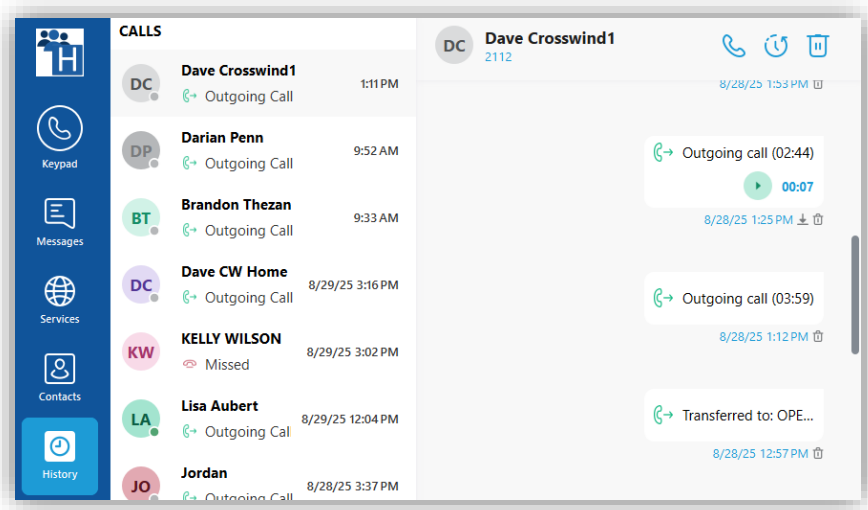




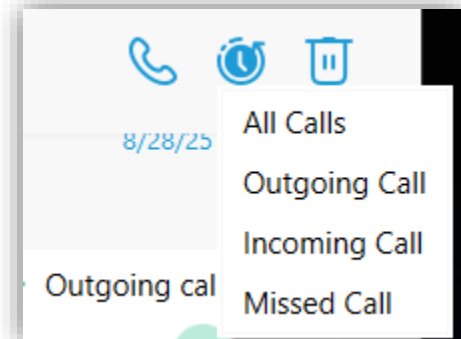
History


The History section displays your past inbound and outbounds calls. If you had recorded any of your calls, the recordings would be in history as well.

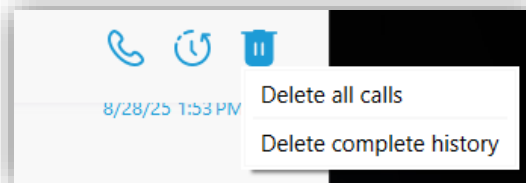
In the list of calls, if you click on one of the calls, it will show the history of that caller. You can call the person by clicking the **Phone**  icon in the top right corner.



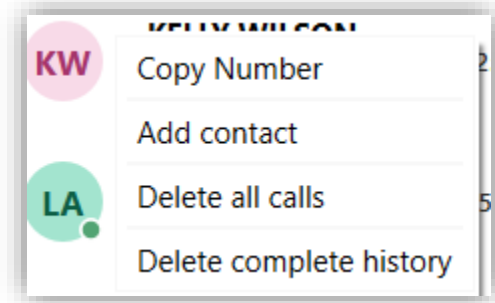
If you click the **History** icon  you can filter by **All calls**, **Outgoing calls**, **Incoming calls**, or **Missed calls**.



If you click the **Delete**  icon you can delete the history for the selected caller, **Delete all calls**, or you can delete all your call history by selecting, **Delete complete history**.



If you right-click on one of the callers under Calls, you will have the option to copy the phone number, **Copy the Number**, add the contact to your Quick Dial, **Add contact**, delete the history for the selected caller, **Delete all calls**, or you can delete all of your call history, **Delete complete history**.

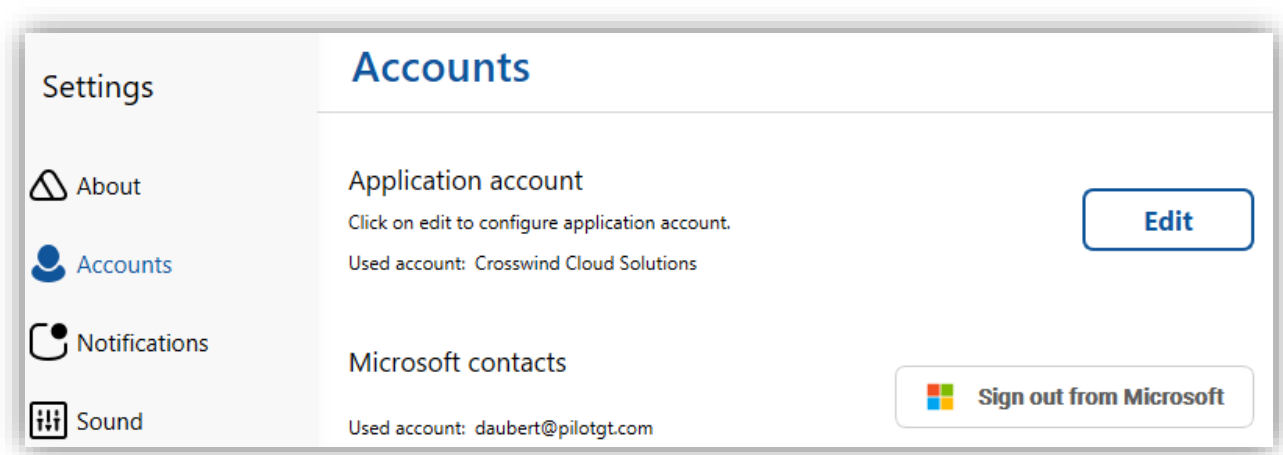


Settings

The Settings section allows you to adjust Accounts, Notifications, Sound, Call Recording, and other options for the Huddle application.

Accounts

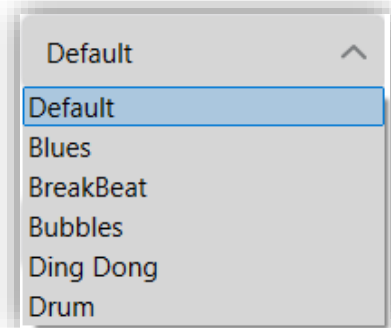
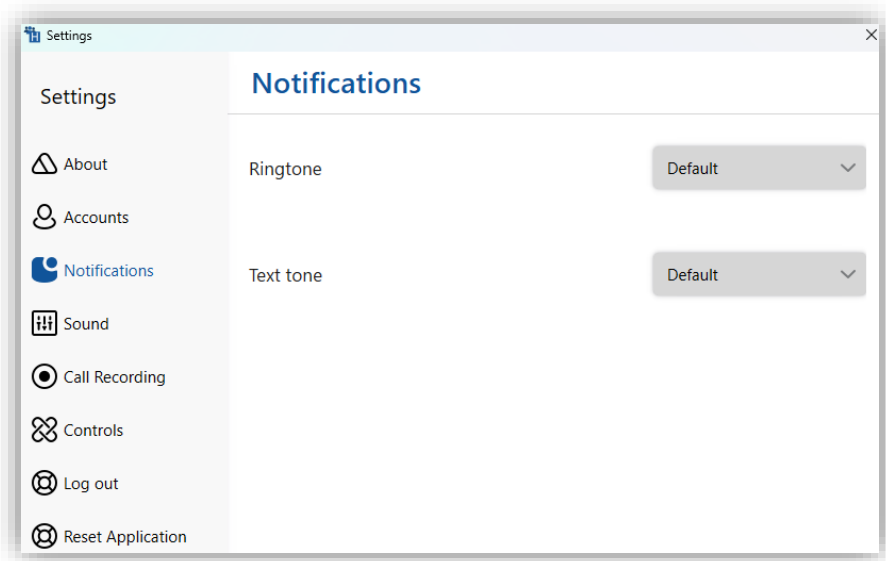
The **Accounts** settings allow you to change the account you use to log into Huddle. You can also sign in or sign out of your Microsoft Office 365 account.



Notifications

The **Notifications** section allows you to change the Ringtone for calls. You cannot currently set the Instant Message sound.





Sound

The **Sound** section allows you to set the **Microphone** and audio output (**Speaker**) for the application. A few other settings are highlighted below.

Microphone: select the microphone to use for calls. This would typically be your headset microphone.

Speaker: select the device where the audio output from the call should go. This would typically be your headset.

Playback volume: Set the volume of the call in your ear or over the speaker.

Ringtone volume: set the call ringer volume.

Keypad volume: controls the volume of the keys when they are dialed.

Mute other apps during call: Off by default. If enabled, while on a call, the sounds from other applications on your computer will be muted.

Enable headsets integration: On by default. If you use other applications like Teams or Zoom, if you experience any headset issues, you can turn this option off.



Settings

About

Accounts

Notifications

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Sound

Microphone

Headset Microphone (Y)

Microphone volume

Microphone gain

Speaker

Default - (Speakers (Pw)

Playback volume

Playback gain

Ringtone audio output

Default - (Speakers (Pw)

Ringtone volume

Keypad volume

Mute other apps during call

Outgoing audio noise suppression

Removes background noise when you speak.

Disabled

Incoming audio noise suppression

Removes background noise from audio coming from other call participants.

Disabled

Echo cancellation mode

Disabled

Enable headsets integration

Enables integration of supported headsets. Turning on should help when experiencing interference or multiple ringing apps when used simultaneously.

EPOS port

The port to be used for communication with EPOS(Sennheiser) headsets. Standard EPOS deployments use port 8001.

8001

Advanced sound settings

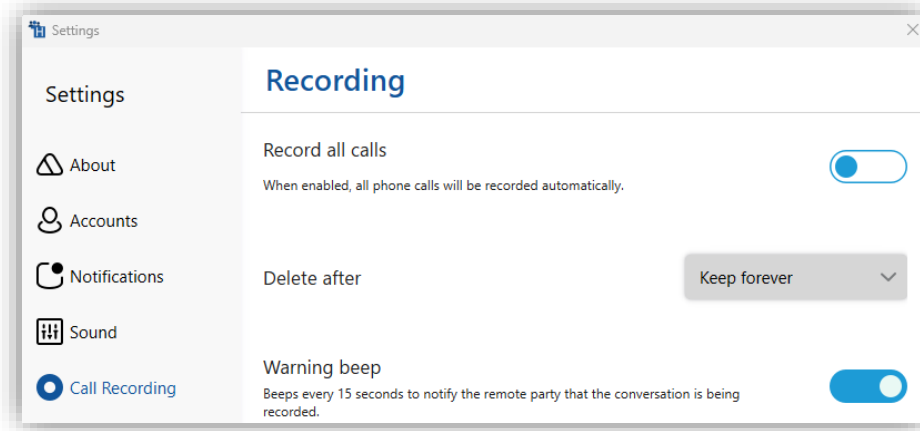
Click here to access advanced sound settings.

Advanced

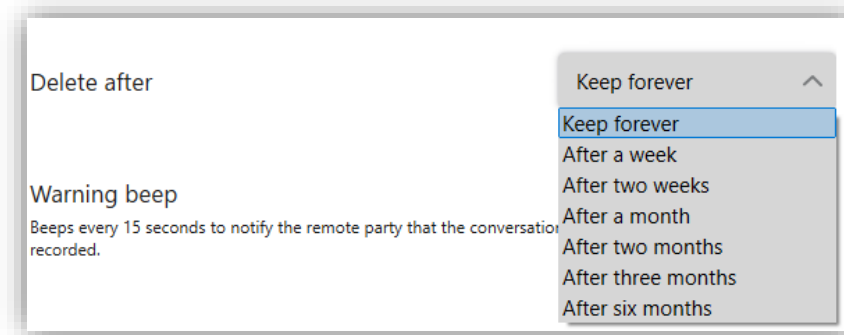


Call Recording

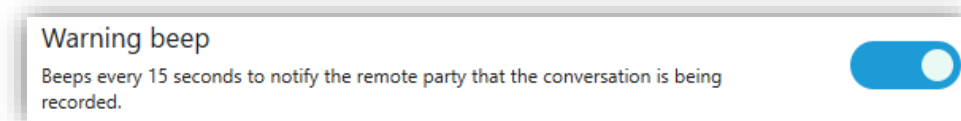
The **Call Recording** settings allow you to set all calls to be recorded, set the retention of recorded calls, and control the warning beep when calls are being recorded.



You can also set the retention (how long it will be kept for) of the recording by clicking the drop down next to “**Delete after**”.



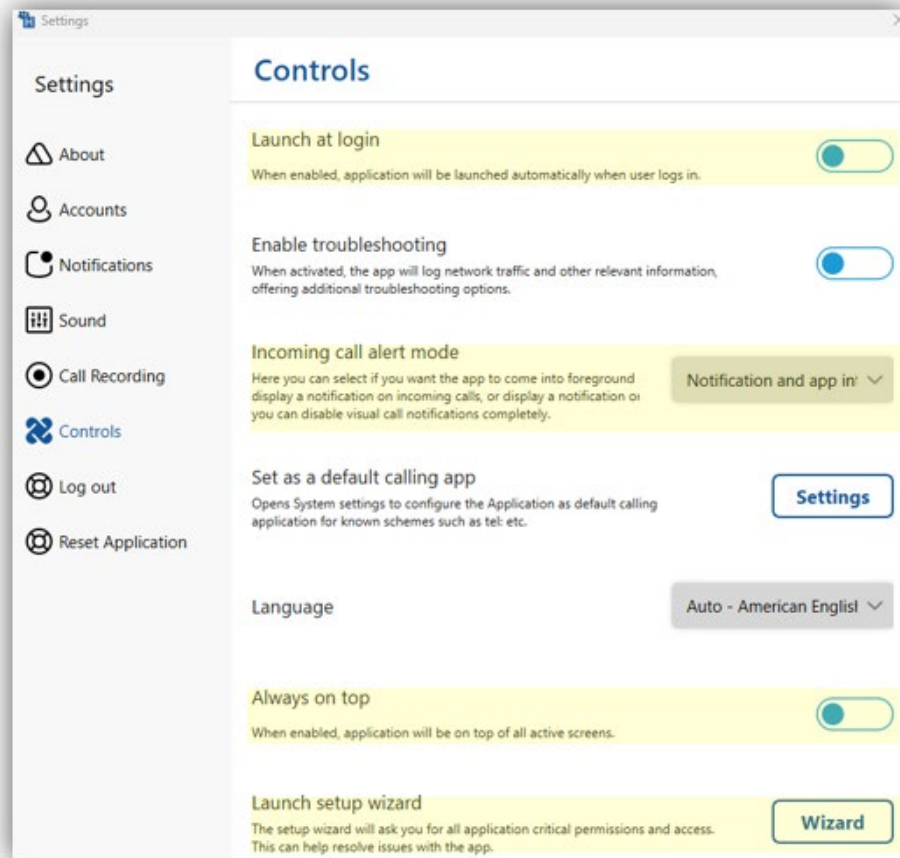
You can also turn off or on the **Warning beep** that notifies the remote party that the conversation is being recorded. By default, this warning beep is set to **On**.



Controls

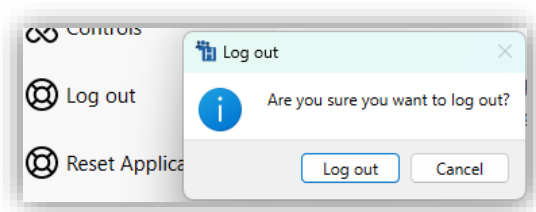
The **Controls** page allows you set various options for Huddle, such as launching it when you log into your computer, setting the alert mode for calls, and setting it as the default calling application to highlight a few.





Log out

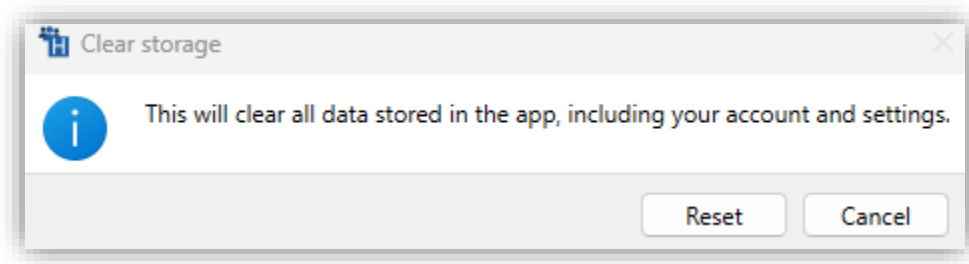
When you log out of Huddle, it will no longer be running for you to receive calls or instant messages, and the next time you open the application you will have to log in.



Reset Application

This option will clear all data stored in the app, like call log, chat log, and will also clear your account and settings. Click Reset on the confirmation message. Once done, you can log back in, but all history and settings will be cleared.





Troubleshoot Headset and Microphone

Troubleshoot Microphone problems in **Windows**: [Click HERE](#)
Sound Input Settings on a **Mac**: [Click HERE](#)

Troubleshoot Headset (Audio) problems in **Windows**: [Click HERE](#)
Troubleshoot Speaker issue with **Mac**: [Click HERE](#)
Sound Output Settings on a **Mac**: [Click HERE](#)

