



Desktop App User Guide

MAC VERSION 6.1.2
WINDOWS VERSION 6.1.2



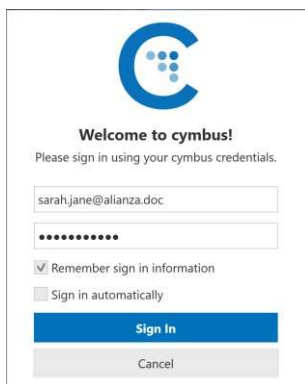
Getting Started

A VoIP service subscription with a local service provider or ISP is required to make audio or video calls with Cymbus. Contact your service provider to set up an account. Once your account is set up with your service provider, you will receive an email from Cymbus with your username and password.

System Requirements

Operating System	Windows 10 macOS 10.13 (High Sierra) macOS 10.14 (Mojave) macOS 10.15 (Catalina)
Processor	Minimum: Core 2 Duo 2.1 GHz Recommended: i5 /i7 2.4 GHz and above
Memory	Minimum: 4GB RAM Recommended: 8GB RAM and above
Hard Disk Space	400 MB (Install/Upgrade, 200 MB operation)
Connection	IP network connection (broadband, LAN, wireless) Constant internet connection
Audio Device	Full-duplex, 16-bit, or use a USB headset

Install and Log In



To get started, download your cloud communications app at <https://cymbus.com/>.

Open the app and log in with the username and password provided by your VoIP service provider. Check *Remember sign in information* and *Sign in automatically*.

You can log in to Cymbus on up to two devices.

Exit Cymbus

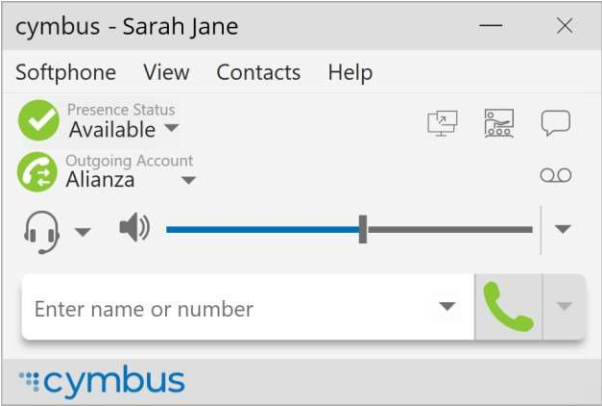
To exit the Cymbus application, tap Settings and click Logout in the top right corner.

Using Cymbus

The screenshots in this guide are from the Windows app. The Mac interface is essentially the same, but the menu is at the top of the screen and includes Cymbus, View, Windows, Contacts, and Help.

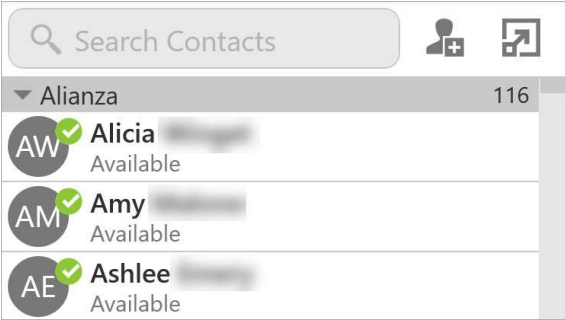


COMPACT VIEW



To create the compact view, hide all resources on the View menu.

DETACHING TABS (WINDOWS)



The Contacts, Favorites, History, and the Directory tabs can all be detached from the on-screen phone into their own window.

Go to the tab you want to detach and then click . To reattach the window, click .

Making Calls

Use Cymbus to place and receive audio and video calls, as well as host conference calls. Cymbus has default actions for the call button and for double-clicking a contact. Update these defaults in **Softphone > Preferences > Application**.

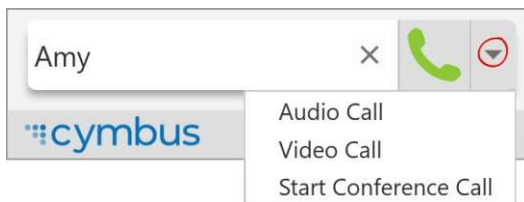
Using the Dialer

Type the name, phone number, or email of the person you want to call in the *Enter name or number* field. Press Enter or Tab to dial.



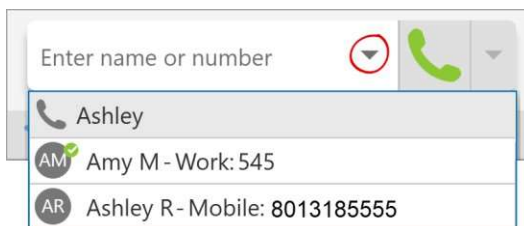
AUTO-COMplete

As you type, Cymbus may display suggestions for completing the entry. Use your mouse or the up and down arrow keys on your keyboard to move through the list of suggestions.




MORE MENU

To make a video call or start a conference, click the More menu arrow on the right after typing the person's full name, phone number, or email.



REDIAL


To redial the last-dialed contact, click  Make a call.
To redial a recent contact, click the arrow in the *Enter name or number* field and select a contact.

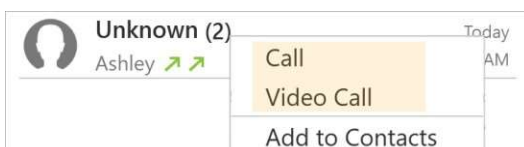
Using Contacts, Favorites, History, or Messages

In the Contacts, Favorites, or History tabs, scroll through your contact lists or type a name, phone number, or email address in the search bar to find the contact you want to call.



CLICK-TO-CALL

Hover over the contact you want to call to reveal the click-to-call button and click  Call this contact.




SHORTCUT MENU

Right-click (Windows) or **CTRL+click** (Mac) on the contact you want to call, then click Call or Video Call.

Features

Call Transfer

In an unattended or blind transfer, you transfer the call to the target without talking to the target first. An attended transfer occurs when you talk to the target before transferring the call.

1. While you have a call established, use any of the methods for placing an audio or video call to place a second call. Cymbus puts the first call on hold and dials the second call.
2. Click  Transfer at the bottom of the call panel. The call is placed on hold.
3. Type the name or number of the second party, use the redial drop-down list, or drag the target's contact number into the *Enter name or number* field.

Unattended Transfer

1. Click Transfer Now if it's your default action or click the drop-down arrow next to Call First and select Transfer Now.
2. Cymbus attempts to transfer the call to the target. The call may end immediately or show Transfer: Calling. Don't hang up yet—If the target doesn't answer, the call will return to you.

Attended Transfer

1. Click Call First if it's your default action or click the drop-down arrow next to Transfer Now and click Call First.
2. When the call is answered, speak to the target. If they want to take the call, click Transfer Now. If they don't want the call, click X at the bottom of the call panel.

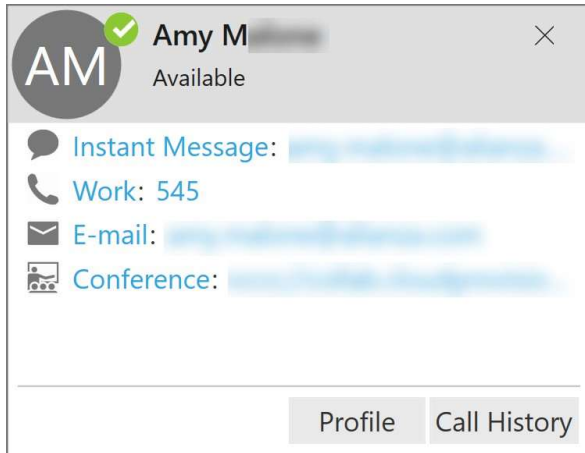
Contacts

Cymbus contacts are pre-populated and managed by your system administrator. Other contacts can be added by you.

View Contacts

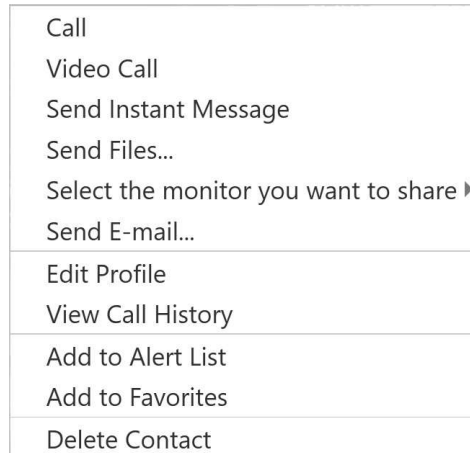
Go to the Contacts or Favorites tabs to view your contacts. Use the search bar to locate an individual contact or scroll to the list.

CONTACT INFO FLYOUT





Click on the name of a Contact or Favorite to view their contact details. For more information, click Profile..

SHORTCUT MENU



Right-click (Windows) or CTRL+click (Mac) on a Contact or Favorite to view the shortcut menu. Here you can initiate a call, send a message or email, add to favorites, and more.

Add Contacts

- **CONTACTS.** In the Contacts tab, click  to add a person to your contact list. In the Contact Profile, choose the group of contacts this person will belong to, and enter their name and number.
- **HISTORY.** From the History tab, select an entry for an unknown contact and click  to add them to your contact list. Alternatively, right-click (Windows) or CTRL+click (Mac) and select Add to Contacts.
- **MENU.** Contacts can also be added from the Contacts menu (top).

IMPORT/EXPORT

Go to the Contacts menu and select Import Contacts or Export Contacts. Contacts can be imported or exported in a .csv, .vcf, or Outlook/Exchange Server format.

Presence

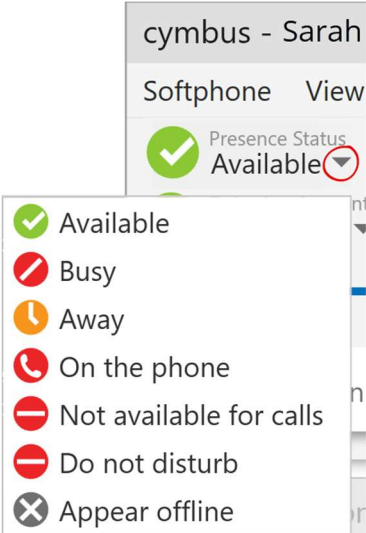
Cymbus allows you to share your online status (presence) with team members. When Cymbus is launched, your online status is Available.

Select the drop-down arrow to change your status to Busy, Away, Not available for calls, Do not disturb, and Appear offline.

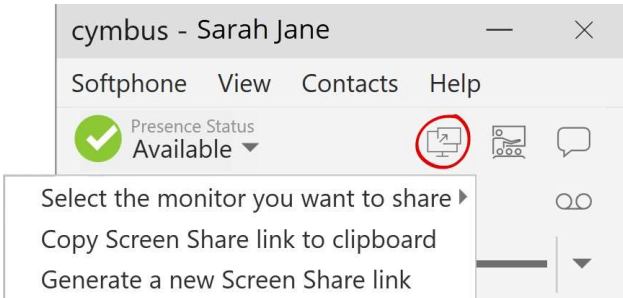
Cymbus updates your status to On the phone when you make or receive a call and your status was Available.


If you do not use your device for a specified period of time (set in Preferences), Cymbus updates your status to Idle.

To set a custom status, click on the wording in the status indicator and type your status. Press `Enter` when you're done.





Screen Share

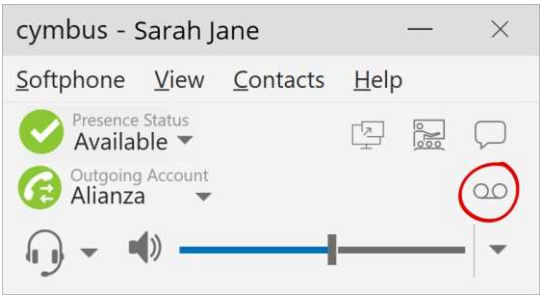


Screen share  lets you share your screen with anyone who has a browser on their device. Screen share sessions do not contain audio, so you'll need an audio call as well as the screen share for a complete experience.

Voice Mail

Voice mail is offered through your VoIP service provider or through your enterprise's IP PBX; it is not part of Cymbus. When you have a new message, an icon showing the number of messages is displayed on the  icon.

To access your voice messages, click the  icon or dial the Voicemail Management star code.



Collaboration

Collaboration, also known as Virtual Meeting Rooms, combines audio, HD video, screen sharing, messaging, and presence in one virtual meeting. Anyone can join your collaboration conference using desktop and mobile devices.

CONFERENCE PIN (OPTIONAL)

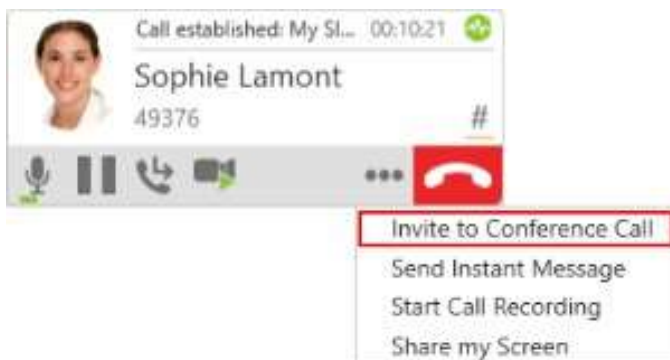
If you want to set a participant PIN, go to Softphone > Preferences (Windows) or Cymbus > Preferences (Mac), choose the Conferences panel, then enable Require PIN/Passcode and enter a number.

Hosting a Conference



The host is responsible for inviting people to a conference as well as starting a conference. Make sure to use a desktop device if you want to share your screen.

Create a conference

1. To begin a conference without an established call, type a name or phone number in the *Enter name or number* field, then click the More menu arrow on the right and select Start Conference Call. Cymbus connects to the first participant.
2. Type a name or phone number into the *Enter name or number* field and click Add. Cymbus starts a three-party conference call.
3. To add more participants, click **...** More options and select Invite to Conference Call.
4. Enter a contact into the *Enter name or number* field at the bottom of the call panel and click Add.
5. Repeat steps 3 and 4 until you have added all participants to the conference.




Add participants to a call

1. Type the first participant's name or phone number in the *Enter name or number* field, then click the  More menu on the right and select Start Conference Call.
2. To add another participant, type their name or phone number into the *Enter name or number* field and click Add.
3. Click  More options and select Invite to Conference Call. Enter a contact into the *Enter name or number* field and click Add. Repeat to add additional participants.




Alternatively, go to the Contacts, Favorites, or History tab. On a contact or entry, right-click (Windows) or **CTRL**+click (Mac) and select Add to Call.

Schedule a conference

1. Click the  Conference icon and select Schedule a Conference.
2. Your primary calendar application will open. Add invitees and set a time. If set, the PIN will be included in the invite.
3. Send the invitation.

Alternatively, click Copy Conference Link to Clipboard and send the link in the way you prefer.

Start a conference now

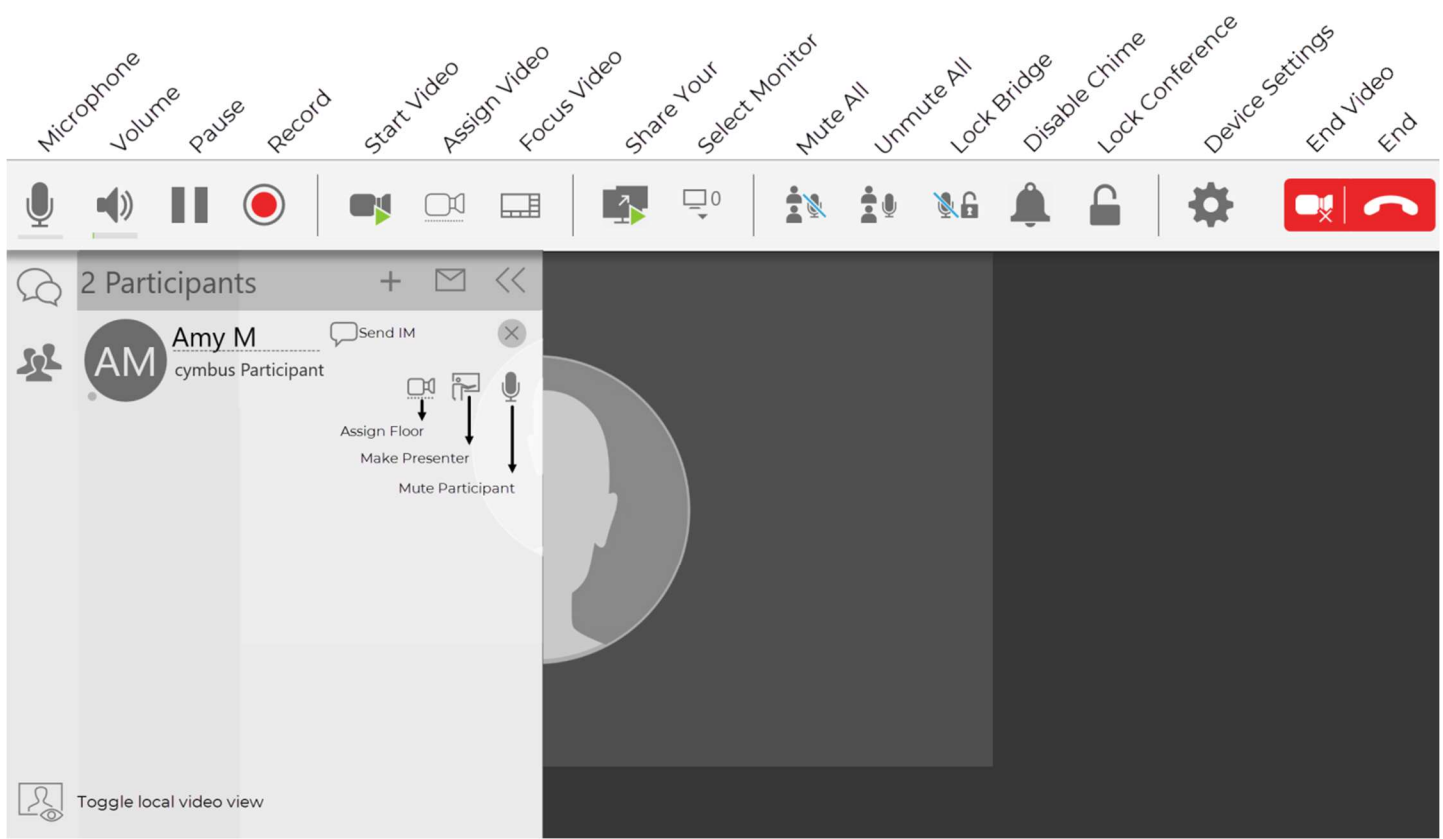
1. Click the  Conference icon and select Start a Conference Now.
2. On the left side of the conference window, select  Participants. Click +, then enter the name or number of the next participant. Repeat for additional participants.
3. In the conference window, click  to share your screen. A yellow bounding box outlines your screen as a visual cue to what is being shared.

Join a Conference


Participants can join a conference using the Cymbus client, a web browser, or by dialing in. Depending on the host's settings, participants may enter the conference immediately or must wait until the host joins. Cymbus needs access to your microphone and camera for a conference.

1. To join a conference, click the link in the invitation email or copy/paste it into your browser.
 - If the browser detects your Cymbus app, Cymbus will launch.
 - If the browser detects that you do not have a Cymbus client, you can install the app, dial in, or join from your browser.
2. Enter your name and a PIN, if required. Tap Join. The name you enter will be displayed to other participants during the conference.
3. If prompted, allow Cymbus to access your microphone and camera.
4. If prompted, enter the conference PIN given by the host.


Conference Console



VIDEO

To include video in a conference call, click the  Start Video icon. The video that the host sees is automatically sent to all participants. If the host pauses or stops the video, other participants no longer receive video. Participants can choose whether to share their own video. Those that do will have (Video) displayed next to their name.


SEPARATE CALLS

During a conference call, you can speak to one of the participants separately while maintaining the conference call. Click  Separate Calls next to the participant, and the conference is split into two calls. When you're done, you can merge the two calls back into the conference or end the one-on-one call and return to the conference.

REMOVE PARTICIPANT

To remove a participant from the conference, select the participant and click X next to their name.


INSTANT MESSAGE

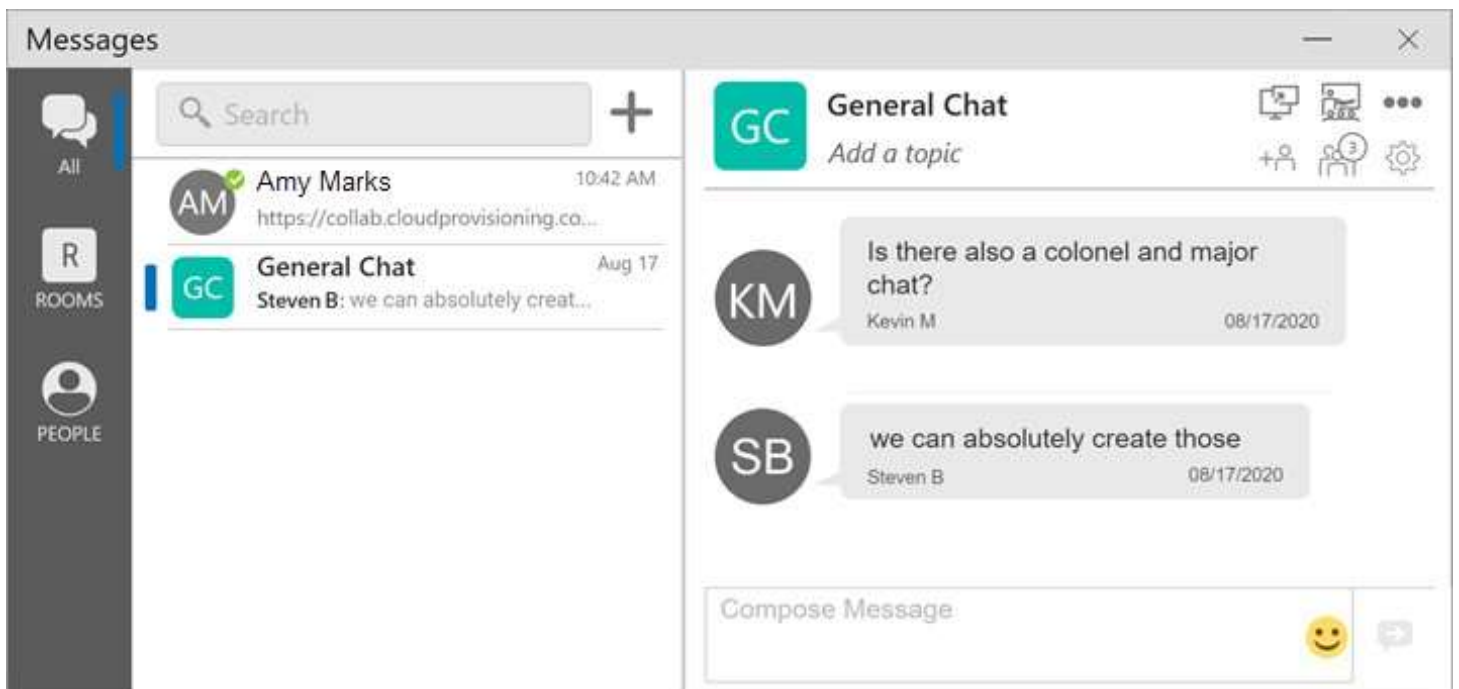
To send an individual instant message to a conference participant, click  Send Instant Message beside their name. Type in your message and press Enter.

Messaging

Instant messages (IMs) can be sent from the Messages window, the Contacts tab, the Favorites tab, or from an active call.

There are multiple ways to view the Messages window:

- Click the  Messages icon in the top right of your softphone.
- Go to View > Messages (Windows) or Window > Show Messages (Mac).
- Type the shortcut `SHIFT+CTRL+M` (Windows) or `SHIFT+COMMAND+M` (Mac)





PREFERENCES



Set the action for clicking `Enter` while typing a message in Preferences > Application.

Send a Message


New conversation

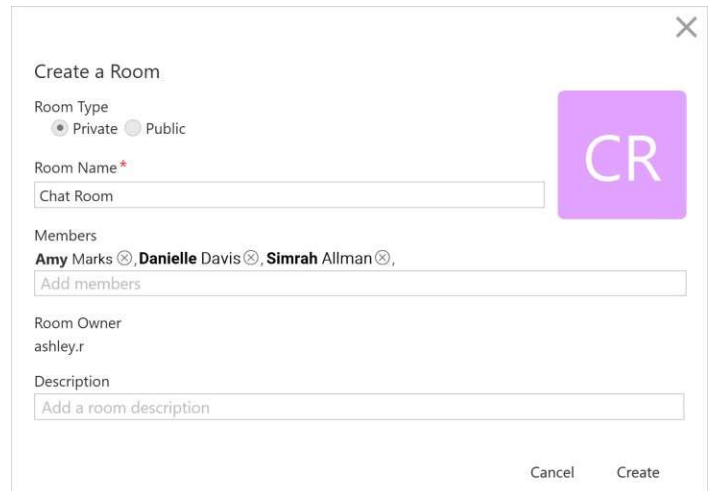
1. In the Messages window, click  New Conversation.
2. Search for the person to add to the chat and select them from the list of suggestions. Press `ENTER` to select the first suggestion in the list.
3. Click on their name below Send A Message to open a chat.
4. Compose your message, then click  Send Message.

Existing conversation

- Do one of the following:
 - In the Messages window, scroll through your conversations or search for the person you want to send a message to, then click on the IM conversation.
 - On the Contacts or Favorites tab, right-click (Windows) or **CONTROL+click** (Mac) on a contact and select Send Instant Message from the shortcut menu.
 - On the Contacts or Favorites tab, hover over the contact and click  Send Instant Message.
 - During an active call, go to **⋮** More options in the call panel and click Send Instant Message.
- Compose your message, then click  Send Message.

Chat Rooms




- In the Messages window, click **+** New Conversation.
- Click Create a Room on the right.
- Enter a room name.
- Type the name of a person you want to add to the room and select them from the list when they appear. Repeat this for all users you want to add to the room.
- Click Create.
- In the group chat room, compose your message, then click  Send Message.



Create a Room

Room Type
 Private Public

Room Name*

Members
 Amy Marks , Danielle Davis , Simrah Allman 

Room Owner
 ashley.r

Description

Cancel Create

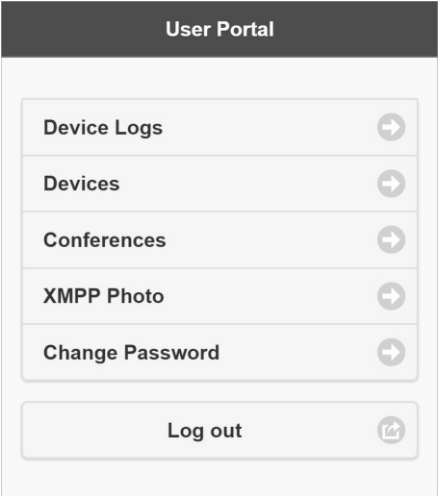
MESSAGE FORMATTING

You can use emoticons and formatting in your IM's and chat rooms.


- WINDOWS:** Use **Ctrl+B** for bold, **Ctrl+I** for Italic, and **Ctrl+U** for underline. Use **Shift+Enter** to insert a new line in a message and **Enter** to send the message
- MAC:** Use **Command+B** for bold, **Command+I** for Italic, and **Command+U** for underline. Use **CTRL+Enter** to insert a new line in a message and **Enter** to send the message.

You can modify this behavior in Preferences > Application: Messages & Presence.

User Portal

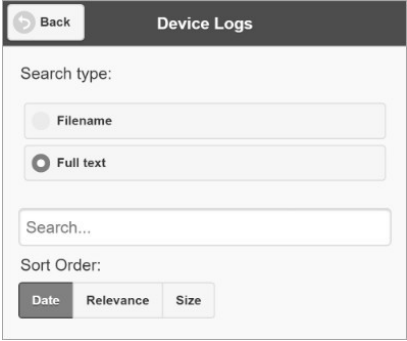


The User Portal is a web-based service that allows end users to manage some of their own services.

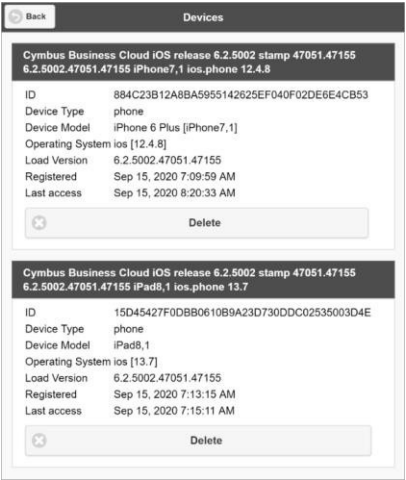
Go to the  End User Portal tab to access these settings.

Device Logs

Search through your device logs by filename or full text. Sort the results by date, relevance, and size.



Devices



You can log in to Cymbus on only two devices. If you need to switch to a new device, one of your old devices will need to be deactivated first.

1. Go to Devices to view your activated devices.
2. Find the record of the device that you wish to deactivate, then click Delete.
3. A message will pop up asking if you're sure you want to delete this device. Click [Delete] to confirm.

Now you can log in on another device.

Conferences

Conference Settings

Manage various conference settings, including:

- The bridge title and description
- If new participants are automatically muted when they join
- If tones are played when participants enter or exit the conference
- Moderator and participant PINs
- Grace period after the host leaves
- Enable automatic conference recordings
- Set up Dropbox for server-based recording
- And more

Bridge Prefix: 118874
 Bridge number: 1234

General Options

Title:

Description:

Email Summary: Send email summary after conference ends

Entry/Exit tones: Play tones when participants join or leave the conference

Join Muted: New participants are automatically muted when they join the conference.

Conference Profile:

Default Video Layout:

Video Name Tags: Show Name Tags

Conference Moderation

Moderator PIN:

Participant PIN:

Moderation: Conference starts only when moderator joins

Grace Period After Host Leaves:

Conference Recording

Automatic Conference Recording: Start conference recording after 2 participants join

Automatic Audio/Video Recording: Audio Only

Dropbox Token:

You may need to re-login Bria after configuring the dropbox token, for Bria to use server-based recording.

Conference Records

View the records of each of your conferences, including the start and end times, number of participants, and each participant's information.

[Back](#) Usage:

Sep 11, 2020 11:03:51 AM
 Sep 11, 2020 10:56:52 AM
 Sep 11, 2020 10:42:04 AM

Start: Sep 11, 2020 10:42:04 AM
End: Sep 11, 2020 10:43:15 AM
Participants: 2

#	Type	Name	Number	Call time
0	BRIA_DESKTOP	Ashley R	guest_AshleyR_e6382d0f_UCMOU	0:01:10
1	BRIA_DESKTOP	Amy M	guest_AmyM_aebfd30c_UCMOU	0:00:52

Time	Sender	Message
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XMPP Photo

The screenshot shows a mobile interface titled "Avatar Photo". At the top left is a "Back" button. Below the title is a small circular profile picture of a woman. Underneath is the text "File to upload:" followed by a "Choose File" button and the filename "Avatar Photo.png". Below that is a "Resize image width:" section with a numeric input field containing "64" and a dropdown arrow. At the bottom is a large button labeled "Upload JPEG or PNG Image" with a checkmark icon on the left.

Your avatar is the image that will be displayed for your contact. Follow these steps to change the photo:

1. Go to XMPP Photo.
2. Click Choose File, then locate the image file on your computer that you want to use as your avatar.
3. Click Upload JPEG or PNG Image.

Change Password

1. Go to Change Password.
2. Enter your old and new passwords. The indicator at the bottom will tell you if your password meets the following requirements:
 - Your new password must contain at least one uppercase letter, one lower case letter, one digit, and one punctuation character.
3. Click Change Password.

The screenshot shows a "Change Password" form with four input fields: "Old password", "New password", and "Confirm password". Below these is a "Show Password" button with a square icon. At the bottom is a large "Change Password" button. Below the button is a "Weak" indicator with a red bar on the left, and the text "New password is too short" below it.

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Need further assistance with Cymbus or Voice Connect? Contact
the Glo Fiber Business NOC: HNOC@horizonconnects.com or
866.533.0859

