



Desktop App User Guide

MAC VERSION 6.5.3
WINDOWS VERSION 6.5.3

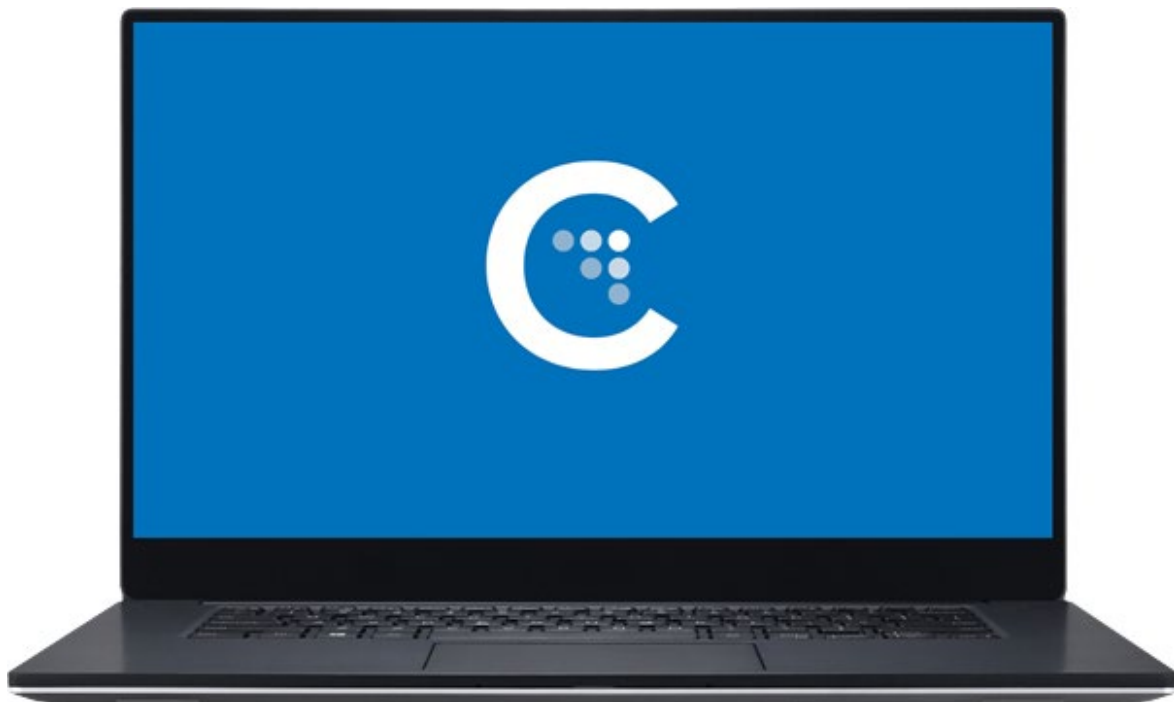


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GETTING STARTED

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.

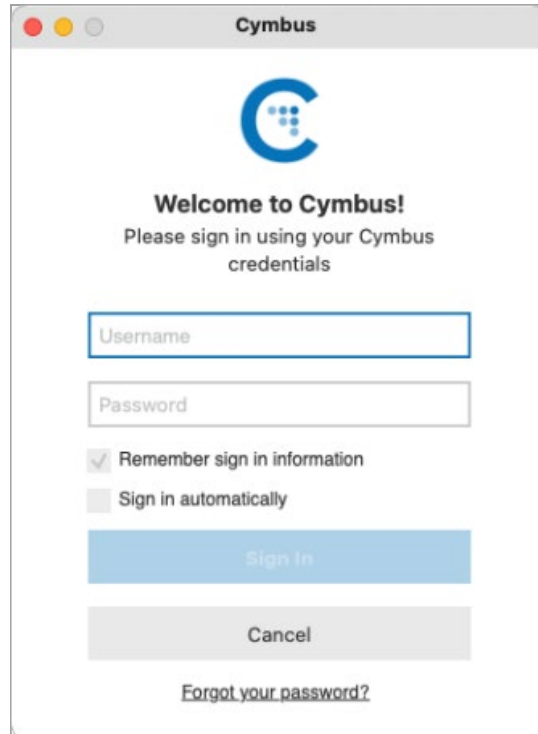
System Requirements

Operating Systems	<ul style="list-style-type: none">• Windows 10 (with the latest update)• Windows 11• macOS 11 (Big Sur)• macOS 12 (Monterey)
Processor	<ul style="list-style-type: none">• Minimum: Single-core 2GHz or higher• Recommended: Dual-core 2GHz or higher
Memory	<ul style="list-style-type: none">• Minimum: 4GB RAM• Recommended: 8GB RAM and above
Hard Disk Space	<ul style="list-style-type: none">• 400 MB (Install/Upgrade, 200 MB operation)
Connection	<ul style="list-style-type: none">• IP network connection (broadband, LAN, wireless)• Constant internet connection
Audio Device	<ul style="list-style-type: none">• Full-duplex, 16-bit, or use a USB headset

Install and Sign In

A *Welcome* email that contains your login details was sent to you when your account was created. Click the link in that email to create your password, then download the app at <https://cymbus.com/> and sign in.

Check *Remember sign in information* and *Sign in automatically*.



Can't sign in?

- If you can't remember your password, click *Forgot your password?* and check your email for a link to reset it. If you don't receive that email, please contact Customer Support.
- You can be signed in to the Cymbus app on up to **two devices**, such as your computer and mobile phone. To deactivate an old device so you can sign in on a new one, see [Devices](#) for more information.

EXIT CYMBUS

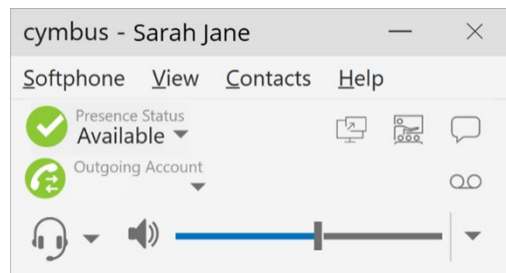
We recommend keeping Cymbus open in the background, but if you need to sign out, go to **Softphone** (Windows) or **Cymbus** (Mac) > **Sign Out**.

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**.

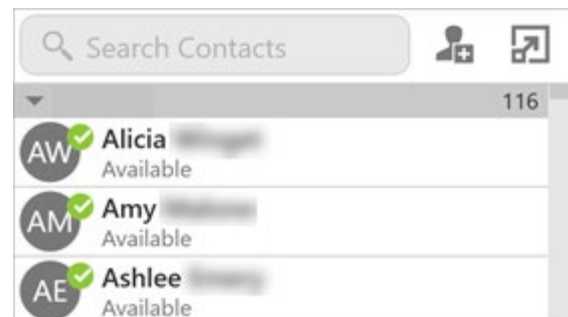




COMPACT VIEW



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

DETACHING TABS (WINDOWS)



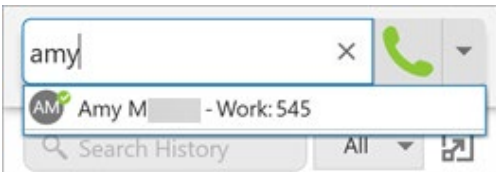
The Contacts, Favorites, History, and the Directory tabs can all be detached from the on-screen phone into their own window. Go to the tab you want to detach and then click . To reattach the window, click .

Making Calls

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

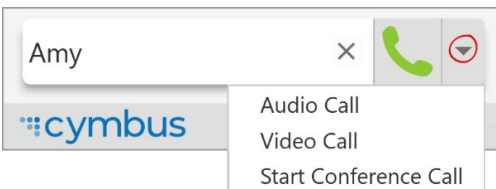
Using the dialer

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.



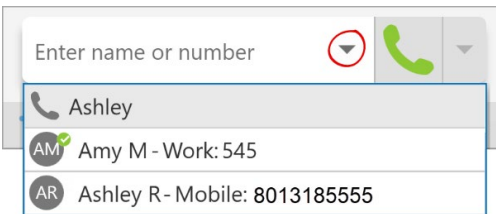
Auto-Complete

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 meeting, click the More menu arrow on the right after typing the person's full name, phone number, or email.

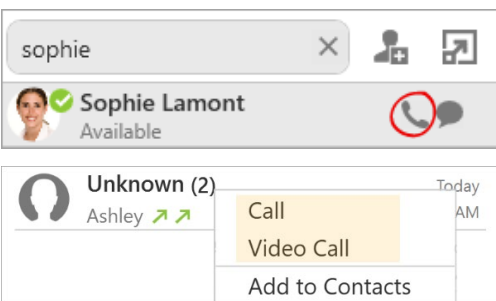


Redial

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**.


CALL HISTORY SYNC

Call logs are synchronized between your devices. Cymbus downloads the logs in small increments as you scroll through the Call History. When a call is deleted from one device, the log is deleted from the server, so the change is reflected on both devices.

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.

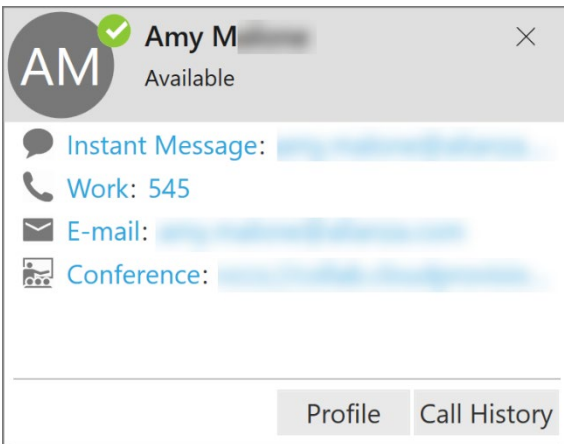
Contacts

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

View contacts

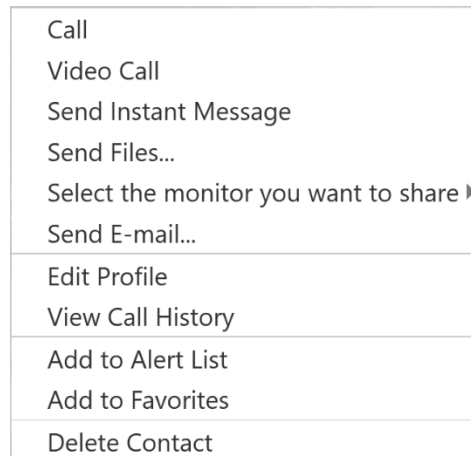
Go to the Contacts or Favorites tabs to view your contacts. Use the search bar to locate an individual contact or scroll to the list.

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

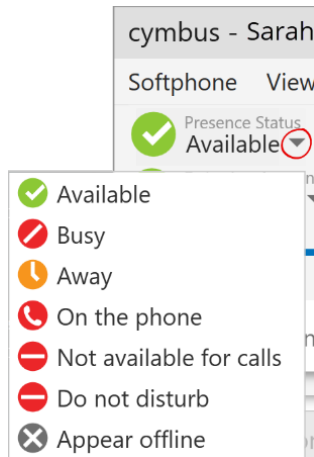
- **CONTACTS**. In the Contacts tab, click  to add a person to your contact list. In the Contact Profile, choose the group of contacts this person will belong to, and enter their name and number.
- **HISTORY**. From the History tab, select an entry for an unknown contact and click  to add them to your 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

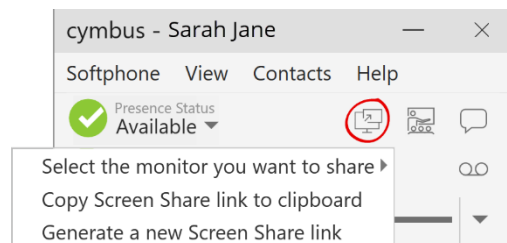
Cymbus allows you to share your online status (presence) with team members. When Cymbus is launched, your online status is **Available**. If you do not use your device for a specified period of time (set in **Preferences**), Cymbus updates your status to **Idle**.




- To change your status, click the drop-down arrow and select **Busy**, **Away**, **Not available for calls**, **Do not disturb**, or **Appear offline**.
- When you make or receive a call and your status was *Available*, Cymbus updates your status to **On the phone**.
- To set a custom status, click on the wording in the status indicator and type your status. Press **Enter** to save.


Screen Share

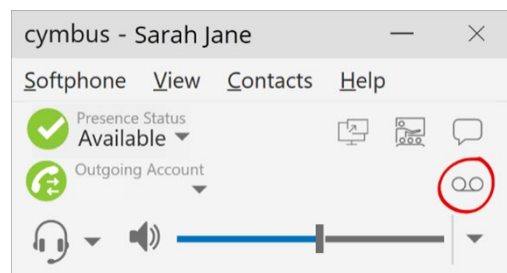
Screen share  lets you share your screen with anyone who has a browser on their device. Screen share sessions do not contain audio, so you'll need an audio call as well as the screen share for a complete experience.



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.



MEETINGS

Video Meetings, also known as Virtual Meeting Rooms or Meetings, combine audio, HD video, screen sharing, messaging, and presence in one virtual meeting. Anyone can join your meeting using desktop and mobile devices.

MEETING PIN (OPTIONAL)


You can set a participant PIN so only those with your PIN can access the meeting.

1. Go to Softphone (Windows) or Cymbus (Mac) > Preferences.
2. Choose the **Meetings** panel.
3. Enable **Require PIN/Passcode** and enter a number.

Host a Meeting





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

Schedule a meeting

1. Click the  **Meeting** icon and select **Schedule a Meeting**.
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 Meeting Link to Clipboard** and send the link another way.

Start a meeting now

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

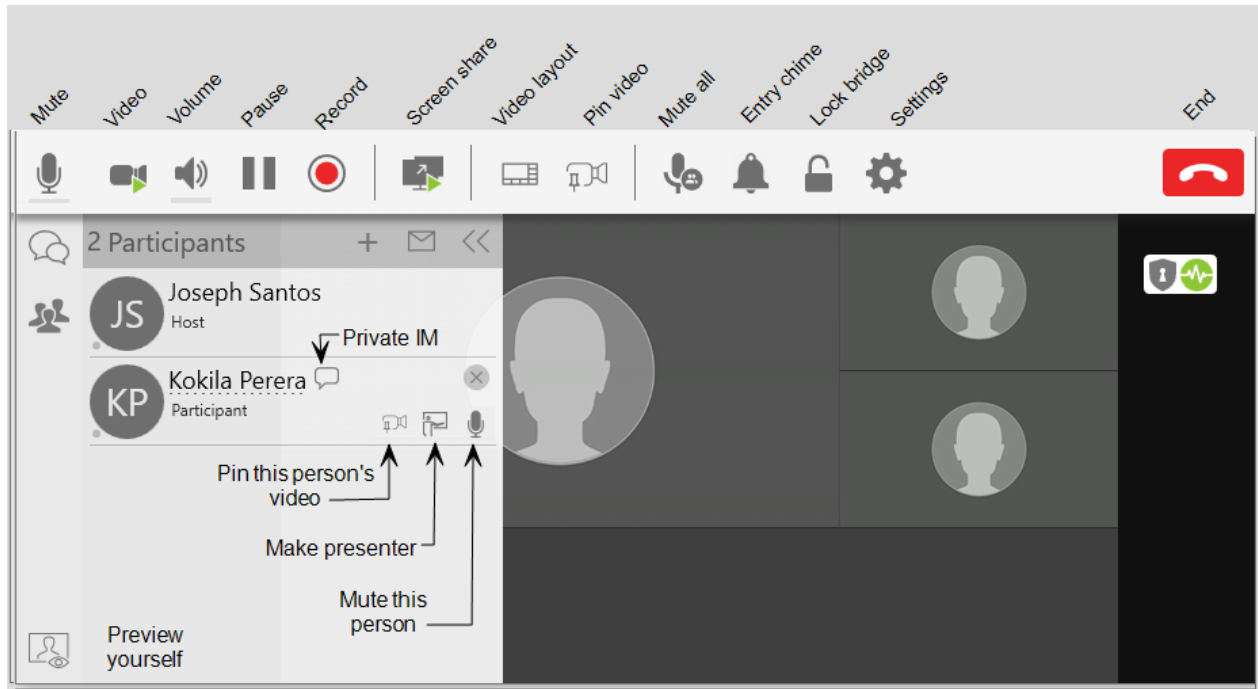
Join a Meeting

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

1. To join a meeting, 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 meeting.
3. If prompted, allow Cymbus to access your microphone and camera.

4. If prompted, enter the meeting PIN given by the host.

Meeting Panel




Video

By default, a meeting call includes video feed of people who choose to send their video. The host and the participants have control over sending and stopping their own video as well as receiving video feed of other members. Other video settings such as video resolution, layout, video name tag and pinned video are controlled by the host.

Remove participant

To remove a participant from the meeting, select the participant and tap X next to their name.


Instant message

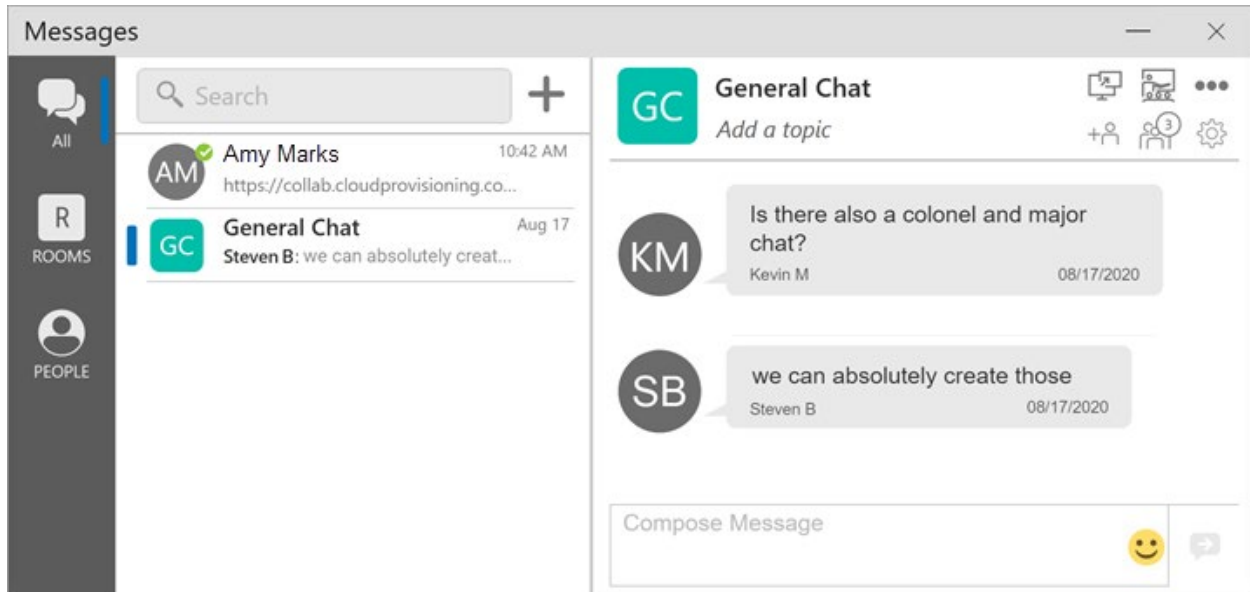
To send an individual instant message to a meeting participant, tap  **Send Instant Message** beside their name. Type in your message and tap **Enter**.

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


1. 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.

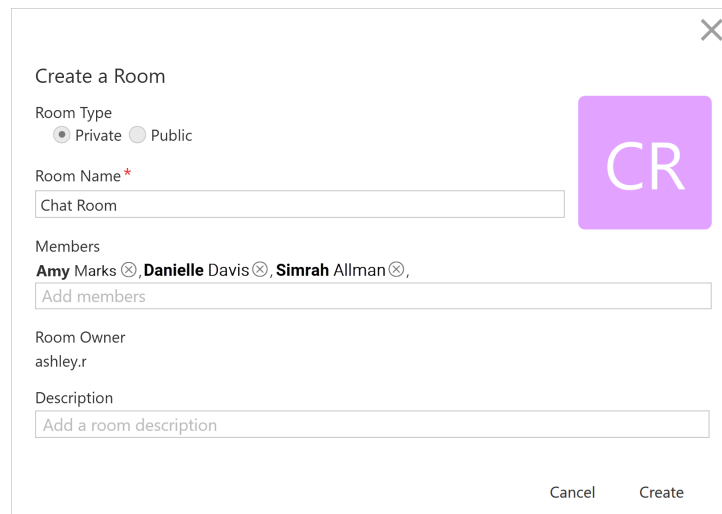
- On the Contacts or Favorites tab, right-click (Windows) or **CONTROL**+click (Mac) on a contact and select **Send Instant Message** from the shortcut menu.
- On the Contacts or Favorites tab, hover over the contact and click  **Send Instant Message**.
- During an active call, go to **⋮ More options** in the call panel and click **Send Instant Message**.

2. Compose your message, then click  **Send Message**.

Chat Rooms

1. In the Messages window, click **+ New Conversation**.
2. Click **Create a Room** on the right.
3. Enter a room name.
4. 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.
5. Click **Create**.

In the group chat room, compose your message, then click  **Send Message**.



Message formatting

You can use emoticons and formatting in your IM's and chat rooms. The default behavior can be modified in Preferences > Application: Messages & Presence.

FORMATTING	WINDOWS	MAC
Bold	Ctrl+B	Command+B
Italic	Ctrl+I	Command+I
Underline	Ctrl+U	Command+U
New Line	Shift+Enter	CTRL+Enter
Send	Enter	Enter

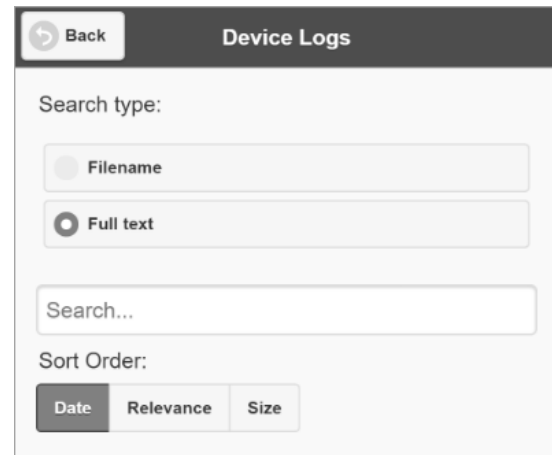
END USER PORTAL

The End User Portal is a web-based service that allows you to manage some of your own app settings. This is separate from the Voice Portal where you can manage your voice services.

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

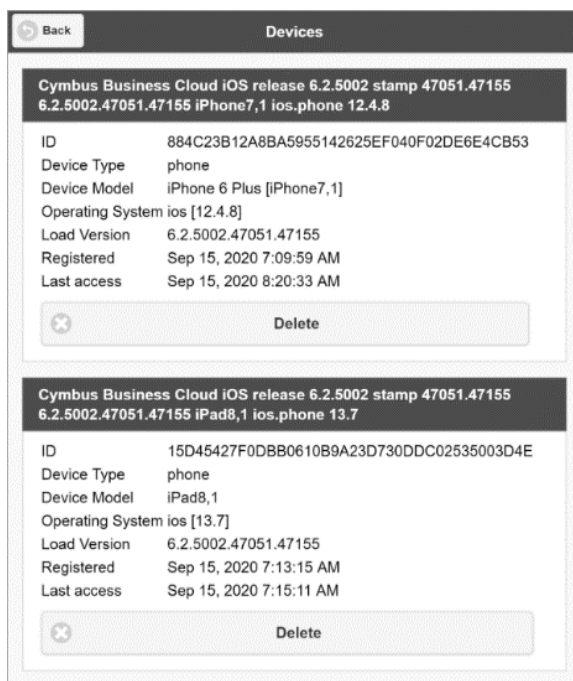
Device Logs

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.



Cymbus Business Cloud iOS release 6.2.5002 stamp 47051.47155 6.2.5002.47051.47155 iPhone7,1 ios.phone 12.4.8	
ID	884C23B12A8BA5955142625EF040F02DE6E4CB53
Device Type	phone
Device Model	iPhone6 Plus [iPhone7,1]
Operating System	ios [12.4.8]
Load Version	6.2.5002.47051.47155
Registered	Sep 15, 2020 7:09:59 AM
Last access	Sep 15, 2020 8:20:33 AM

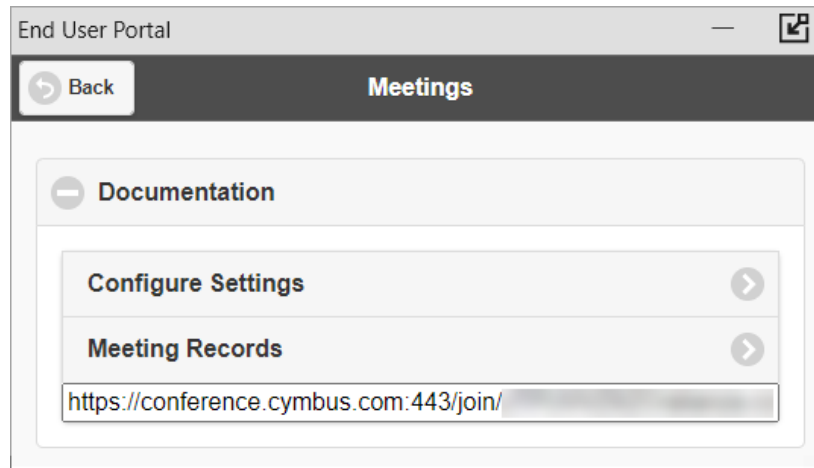
Cymbus Business Cloud iOS release 6.2.5002 stamp 47051.47155 6.2.5002.47051.47155 iPad8,1 ios.phone 13.7	
ID	15D45427F0DBB0610B9A23D730DDC02535003D4E
Device Type	phone
Device Model	iPad8,1
Operating System	ios [13.7]
Load Version	6.2.5002.47051.47155
Registered	Sep 15, 2020 7:13:15 AM
Last access	Sep 15, 2020 7:15:11 AM

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.

Meetings

Access your Meeting Settings and Meeting Records. At the bottom of the menu is your personal bridge link.



Meeting Settings

Manage your meeting settings, including:

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

 A screenshot of the "Meeting Settings" configuration page. At the top, there are input fields for "Bridge Prefix" and "Bridge number". The page is divided into three main sections: "General Options", "Meeting Moderation", and "Meeting Recording".

 "General Options" includes:

- Title: [text input]
- Description: [text input]
- Email Summary: ☒ Send email summary after meeting ends
- Email Timezone: [dropdown menu] with a note: "Timezone to format dates with for the summary email"
- Entry/Exit tones: ☒ Play tones when participants join or leave the meeting
- Join Muted: ☐ New participants are automatically muted when they join the meeting.
- Meeting Resolution: 1280x720 [dropdown]
- Default Video Layout: Grid [dropdown]
- Lone Participant Sound: [dropdown]
- Video Name Tags: ☒ Show Name Tags

 "Meeting Moderation" includes:

- Moderator PIN: [text input]
- Participant PIN: [text input]
- Moderation: ☐ Meeting starts only when moderator joins

 "Meeting Recording" includes:

- Automatic Meeting Recording: ☐ Start Meeting recording after 2 participants join
- Automatic Audio/Video Recording: ☐ Audio Only
- Dropbox Token: [text input]
- A "Set up Dropbox" button with a plus icon.

 At the bottom, there's a note: "You must re-login to the softphone client after configuring the dropbox token to use server-based recording." and two buttons: "Reset" and "Save".

Meeting Records

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

The screenshot shows a 'Usage:' screen with a list of meetings. The selected meeting details are as follows:

#	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

Below the table is a section for 'Time', 'Sender', and 'Message'.

XMPP Photo

The screenshot shows the 'Avatar Photo' screen. It includes a 'File to upload:' section with a 'Choose File' button and the filename 'Avatar Photo.png'. Below this is a 'Resize image width:' section with a dropdown menu set to '64'. At the bottom is a button labeled 'Upload JPEG or PNG Image'.

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

The screenshot shows the 'Change Password' screen. It has three input fields: 'Old password', 'New password', and 'Confirm password'. Below these is a 'Show Password' button. At the bottom is a 'Change Password' button. A strength indicator shows 'Weak' with a red bar and the text 'New password is too short'.

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.



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