



Desktop App User Guide

MAC VERSION 6.4.1
WINDOWS VERSION 6.4.1



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GETTING STARTED

A PenTeleData VoIP service subscription to make audio or video calls with Cymbus.

System Requirements

Operating Systems	<ul style="list-style-type: none">• Windows 10• macOS 10.13 (High Sierra)• macOS 10.14 (Mojave)• macOS 10.15 (Catalina)• macOS 11.2 (Big Sur)
Processor	<ul style="list-style-type: none">• Minimum: Core 2 Duo 2.1 GHz• Recommended: i5/i7 2.4 GHz and above
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 the following.

[Windows](#)

[Mac](#)

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

Can't sign in?

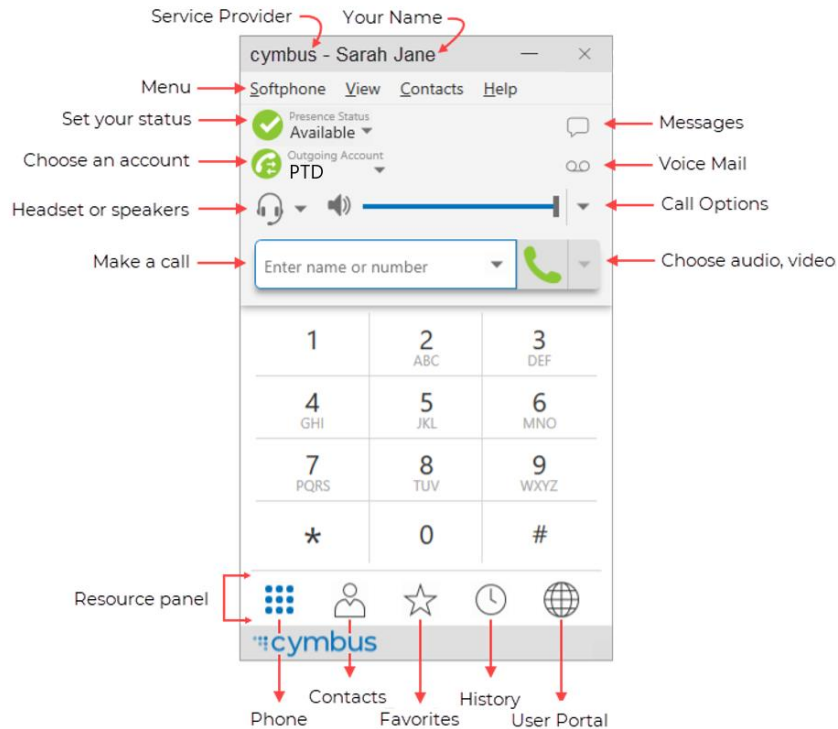
- If you can't remember your password, click *Forgot your password?* and check your email for a link to reset it. If you don't receive that email, please contact Customer Support.
- You can be signed in to the Cymbus app on up to two devices, such as your computer and mobile phone. To deactivate an old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

EXIT CYMBUS

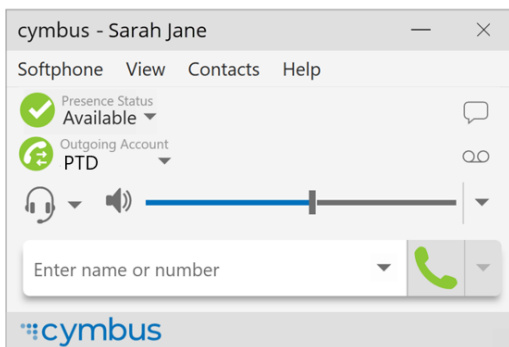
We recommend keeping Cymbus open in the background, but if you need to sign out, go to **Softphone** (Windows) or **Cymbus** (Mac) > **Sign Out**.

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**.

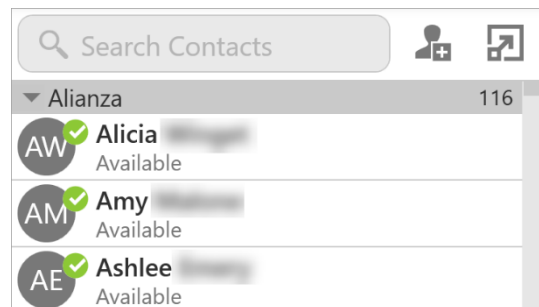


COMPACT VIEW



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.

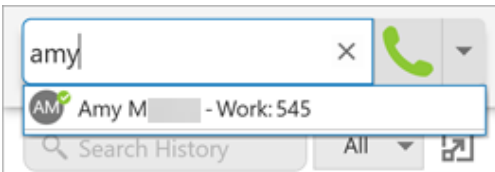
Go to the tab you want to detach and then click . To reattach the window, click .

Making Calls

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

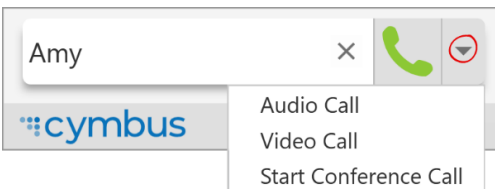
Using the dialer

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.



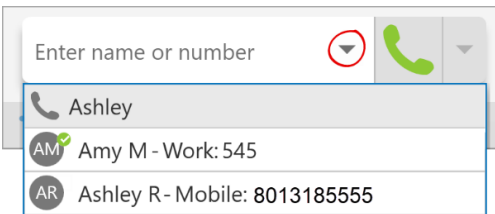
Auto-Complete

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.

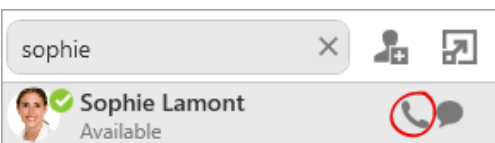


Redial


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.

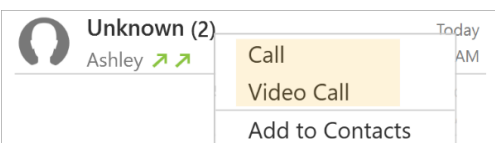
Using Contacts, Favorites, History, or Messages

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**.


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.

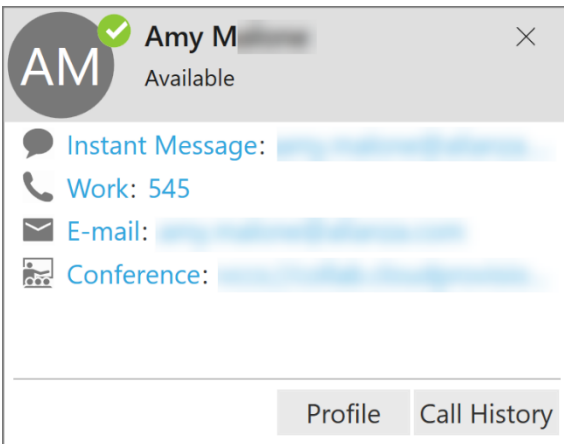
Contacts

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.

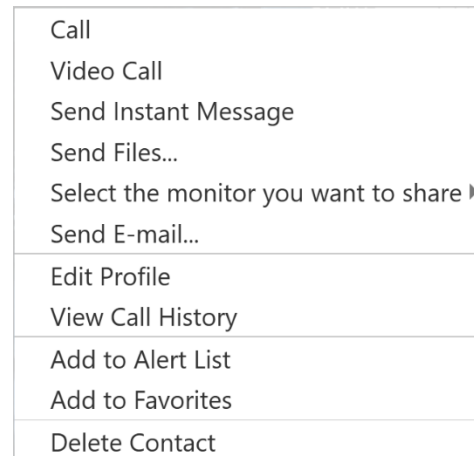
CONTACT INFO FLYOUT



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

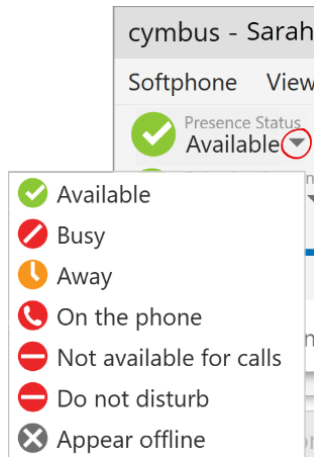
- **CONTACTS**. In the Contacts tab, click  to add a person to your contact list. In the Contact Profile, choose the group of contacts this person will belong to, and enter their name and number.
- **HISTORY**. From the History tab, select an entry for an unknown contact and click  to add them to your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

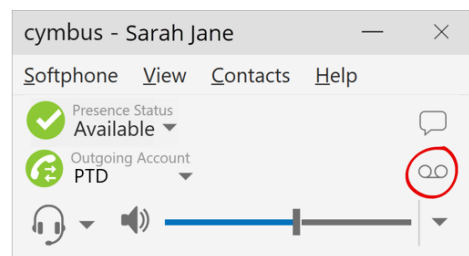


- To change your status, click the drop-down arrow and select **Busy**, **Away**, **Not available for calls**, **Do not disturb**, or **Appear offline**.
- When you make or receive a call and your status was *Available*, Cymbus updates your status to **On the phone**.
- To set a custom status, click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

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.

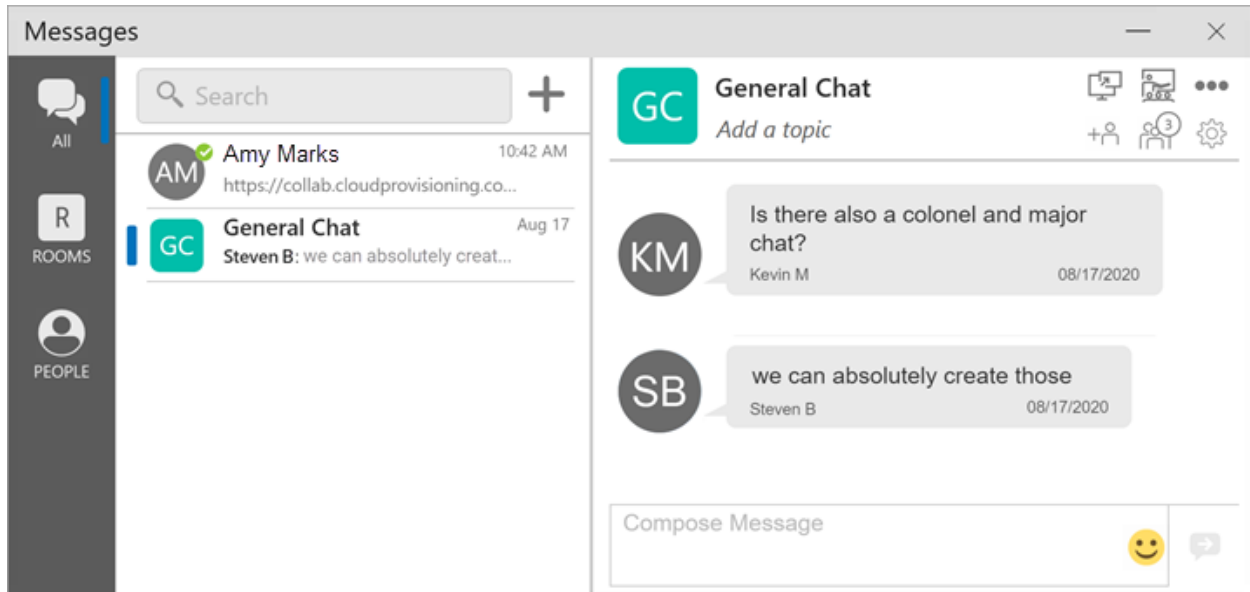


MESSAGING

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.

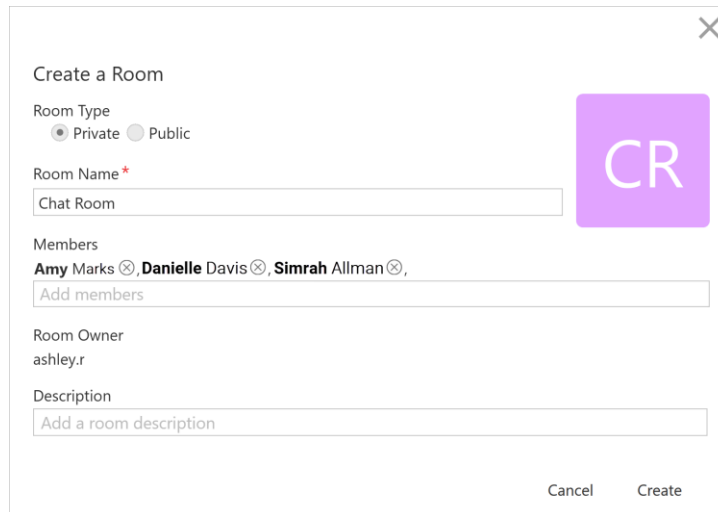
- On the Contacts or Favorites tab, right-click (Windows) or **CONTROL**+click (Mac) on a contact and select **Send Instant Message** from the shortcut menu.
- On the Contacts or Favorites tab, hover over the contact and click  **Send Instant Message**.
- During an active call, go to **More options**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



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. The default behavior can be modified in Preferences > Application: Messages & Presence.

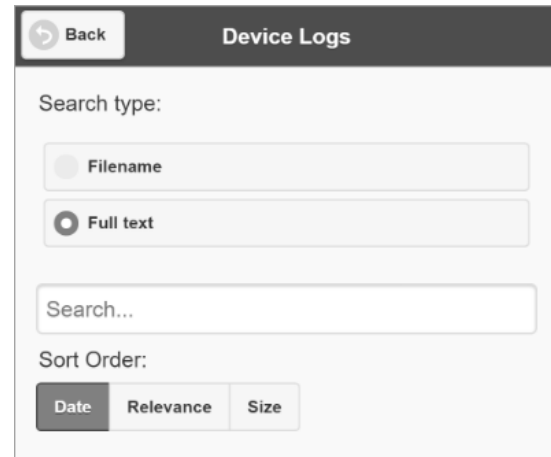
FORMATTING	WINDOWS	MAC
Bold	Ctrl+B	Command+B
Italic	Ctrl+I	Command+I
Underline	Ctrl+U	Command+U
New Line	Shift+Enter	CTRL+Enter
Send	Enter	Enter

END USER PORTAL

The End User Portal is a web-based service that allows end users to manage some of their own services. Go to the  **End User Portal** tab to access these settings.

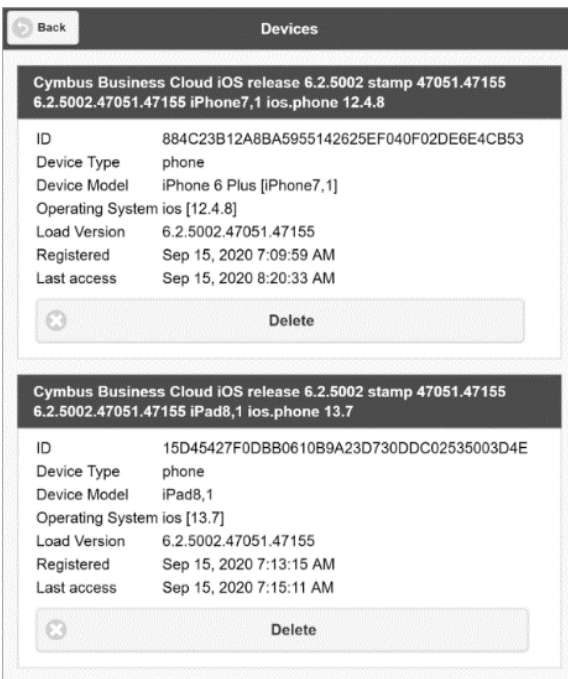
Device Logs

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.



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	iPhone6,1
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
<input type="button" value="Delete"/>	

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
<input type="button" value="Delete"/>	

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.

XMPP Photo

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.



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