



Desktop Cloud Communicator Guide

Version 6

The purpose of this document is to provide an overview of
Cloud Communicator Desktop Version 6 for end users.

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1 INTRODUCTION

Cloud PBX can optionally be provided with powerful desktop and mobile software add-on called the Cloud Communicator.

This document covers the Desktop versions of Cloud Communicator which provides the following key features:

- Integrated Soft Phone client for making and receiving PBX extension calls
- Can be paired to an existing IP Handset
- Allows placing of calls to PBX users and CRM/Google/ Microsoft Outlook Exchange contacts with a single mouse click
- Provides SSL encrypted Instant Messaging and Chat between PBX users,
- Allows you to set your Presence and notify PBX users of your status and availability for calls and IM
- Powerful conferencing features that allows you to control all elements of a conference Including an IM invite, scheduling, visual control and visibility of what users have joined Muting and unmuting users, user disconnection and invitation of external PSTN numbers
- Drag and drop call transfers and much more.

2 COMMUNICATOR VERSIONS

The Desktop Cloud Communicator is available in a number of versions:

- Office
- Business

The table below compares the different Desktop versions

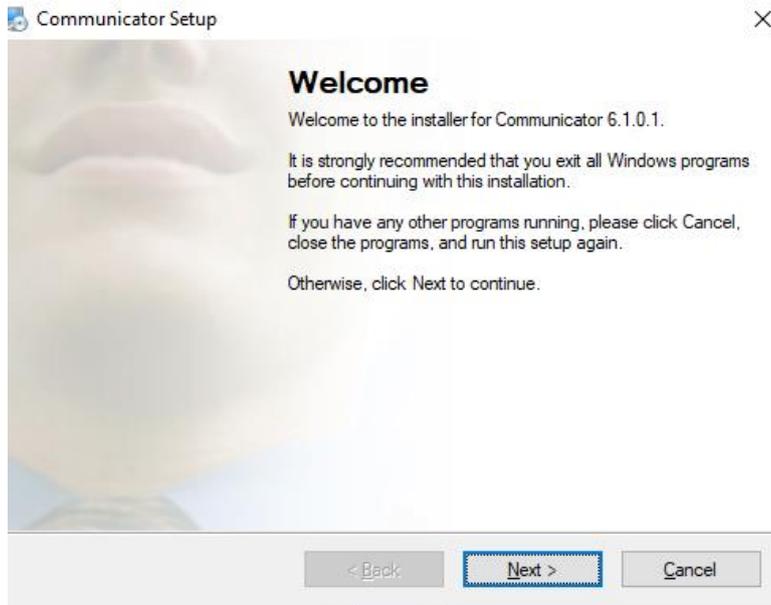
Version	Office	Business
Softphone		yes
Google Contacts	yes	yes
Outlook Contacts	yes	yes
Multiple Profiles	yes	yes
Desk phone control	yes	yes
FAX support	yes	yes
CRM Integration	yes (optional)	yes (optional)

3 INSTALLATION OF CLOUD COMMUNICATOR

Latest copies of Cloud Communicator are available from, the Cloud PBX Web Site at www.cloudpbx.net.au Once you've downloaded the installation file please follow the installation instructions below. Note these instructions are for the Windows version.

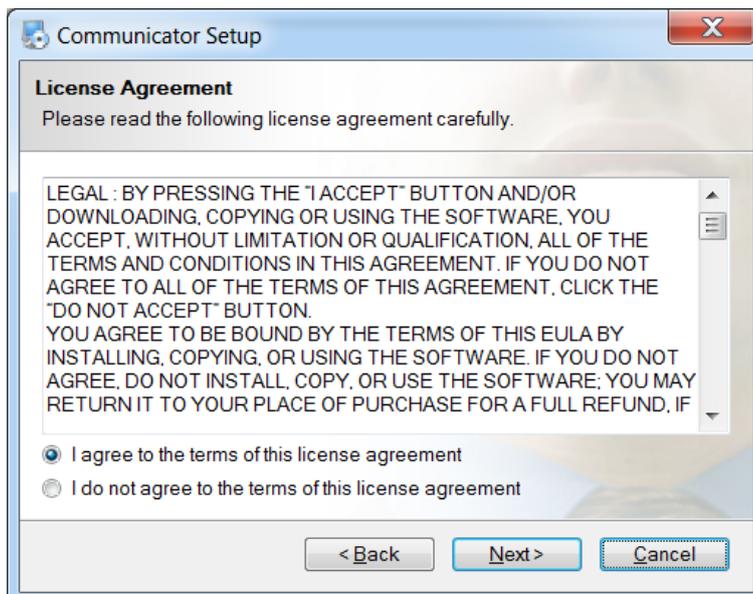
3.1 Welcome

Click 'Next' to proceed with the installation or 'Cancel' to exit the installation wizard.



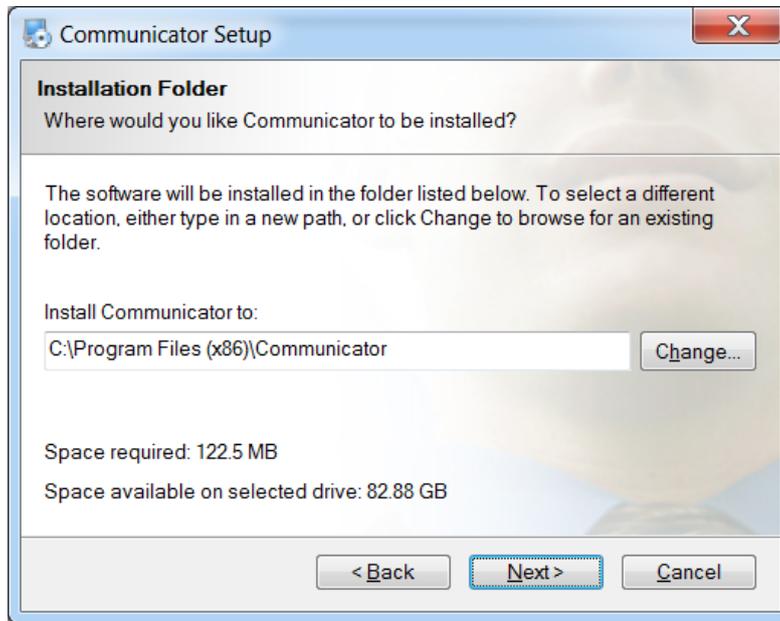
3.2 License Agreement

Read the license agreement and select 'I agree...!' if you accept 'License Agreement'. Click 'Next' to proceed with the installation or 'Cancel' to exit the installation wizard.



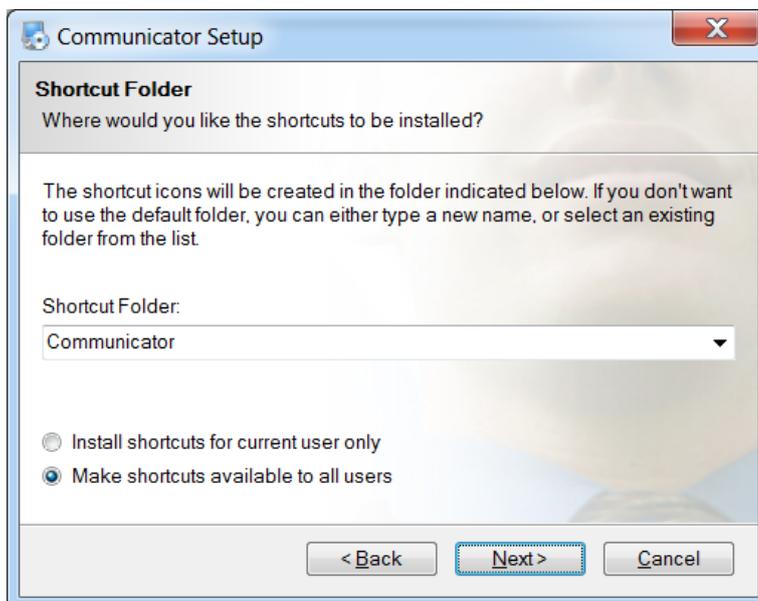
3.3 Installation Folder

Installation Folder window sets the default location where Cloud Communicator installation will reside. By default 'C:\Program Files\ Communicator' is offered. To select different location click on 'Change...' button. When done, click 'Next' to proceed with the installation or 'Cancel' to exit the installation wizard.



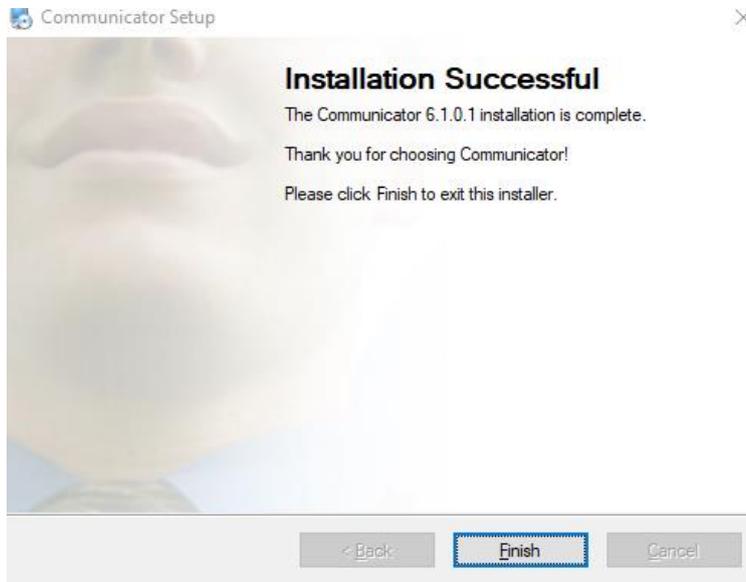
3.4 Shortcut Folder

Shortcut Folder window sets the way new Cloud Communicator shortcut will be displayed under Windows 'Start' menu. Select preferred shortcut under 'Shortcut Folder' select box and click 'Next' to proceed with the installation or 'Cancel' to exit the installation wizard.



3.5 Installation Successful

Installation Successful window is displayed after the installation is complete. Click 'Finish' to exit the Installation wizard.



3.6 Profile Wizard

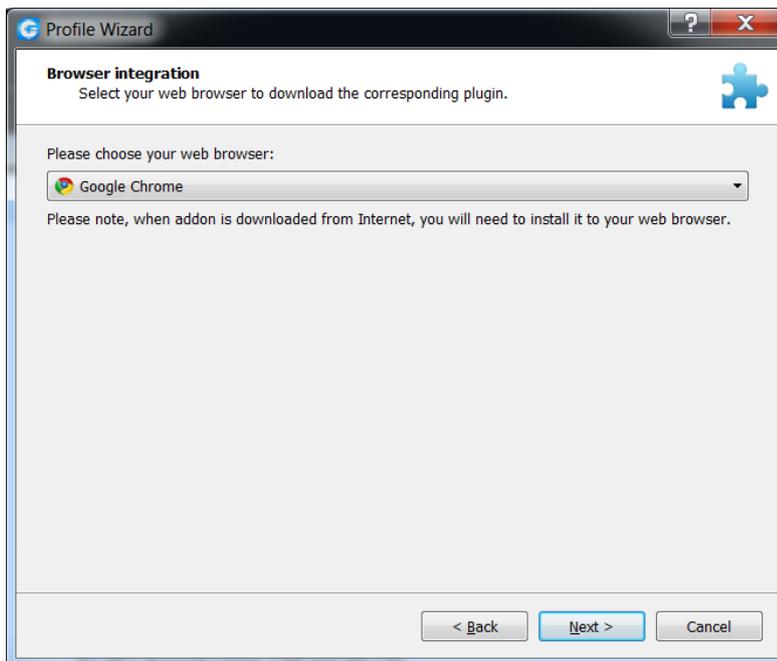
Now run the Profile Wizard to configure Communicator.

To run the Profile Wizard ensure you have the following details

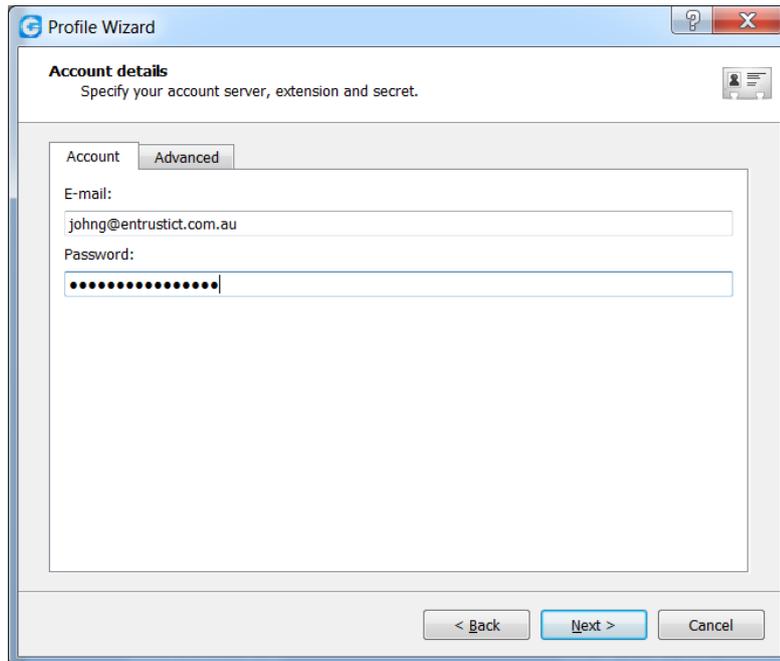
Field	Description
Email Address	The Email Address assigned to the extension you want to use on the PBX. The same Email Address can be used for multiple extensions but the passwords must be different.
Password	The User Password associated with the Email Address
Login Server	The Login Server for the PBX
SIP PROxy	The SIP Proxy for the PBX



Select the Browser you want to use for integration with Communicator. This will allow you to right mouse click on a URL for input into Communicator – as an example to make a call.

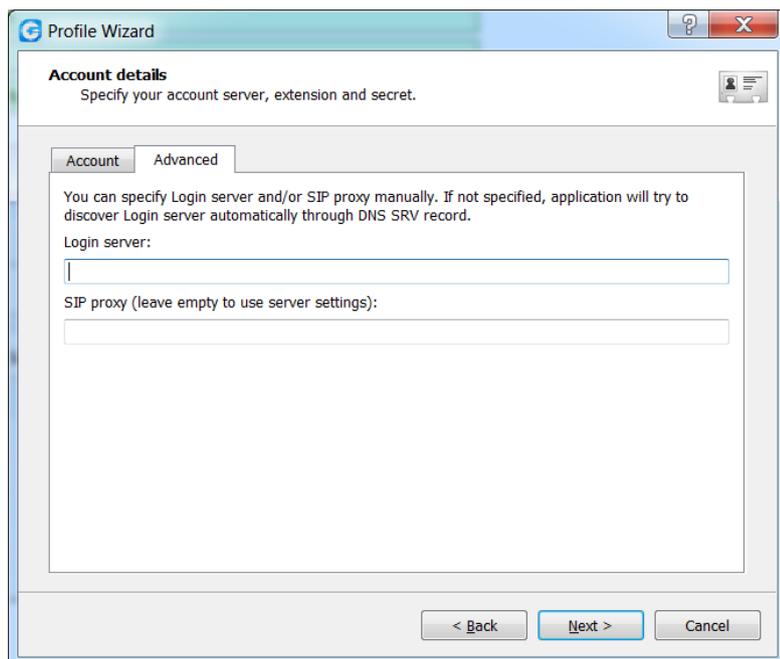


Enter your Email Address and User Password that will be provided to you by the PBX Administrator.



The screenshot shows the 'Profile Wizard' window with the 'Account details' section active. The subtitle reads 'Specify your account server, extension and secret.' There are two tabs: 'Account' and 'Advanced'. The 'Account' tab is selected. It contains two input fields: 'E-mail:' with the value 'johng@entrustict.com.au' and 'Password:' with a masked password of 12 dots. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Enter The Login Server and SIP Proxy Server that will be supplied by the PBX Administrator
The SIP Proxy Server is optional and the default setting for the Login server should work.



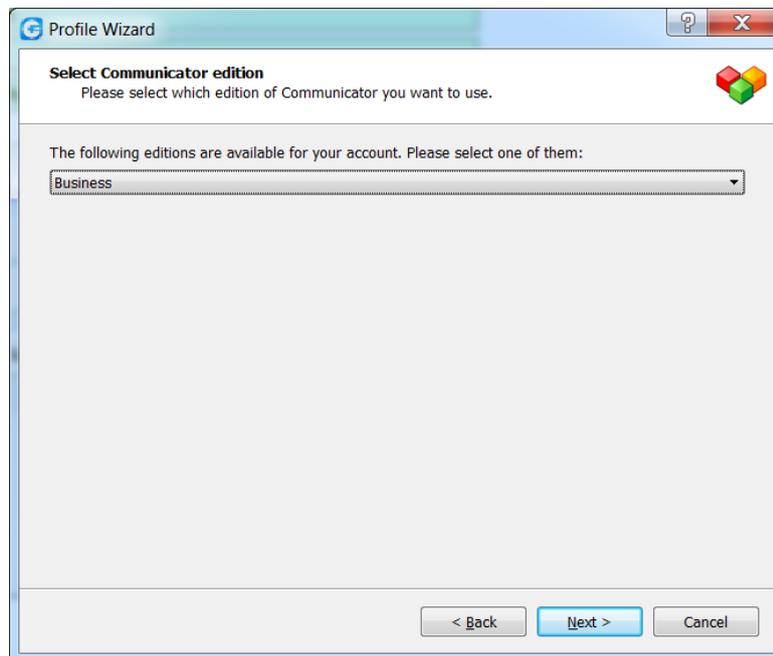
The screenshot shows the 'Profile Wizard' window with the 'Advanced' section active. The subtitle reads 'Specify your account server, extension and secret.' There are two tabs: 'Account' and 'Advanced'. The 'Advanced' tab is selected. It contains a text block: 'You can specify Login server and/or SIP proxy manually. If not specified, application will try to discover Login server automatically through DNS SRV record.' Below this are two input fields: 'Login server:' and 'SIP proxy (leave empty to use server settings):'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

You will now be requested to change your User Password



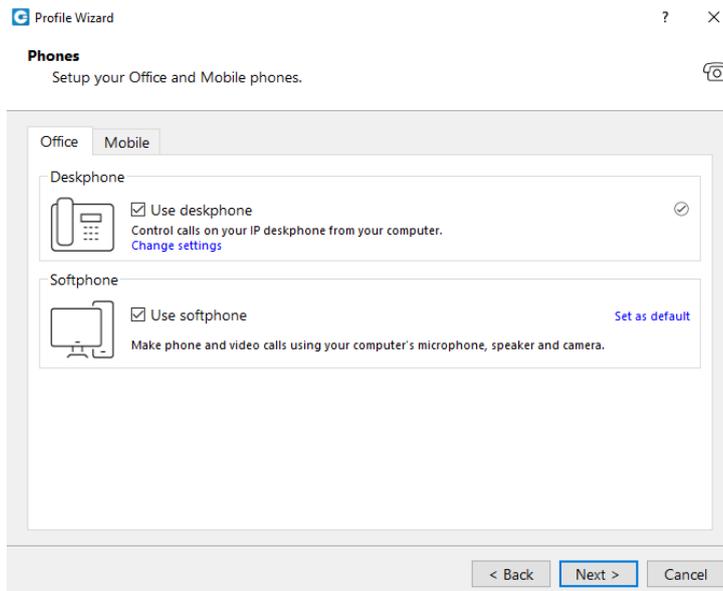
A dialog box titled "Change password" with a question mark icon and a close button. The text inside reads: "This is the first time you are logging in, and you need to change your password:". Below this are two input fields: "New password (8 characters minimum):" and "Re-type password:", both containing eight black dots. A "Password strength:" section features a green progress bar that is approximately 85% full, with the text "Secure - 85%" below it. An "OK" button is located at the bottom right.

Now select the Communicator Edition to Use

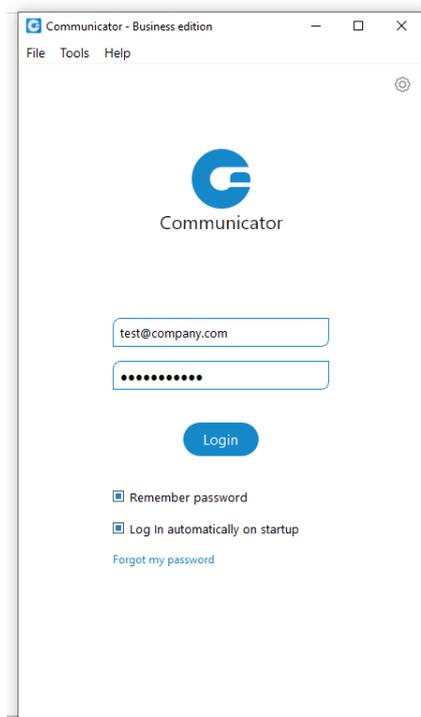


A "Profile Wizard" dialog box with a question mark icon and a close button. The title is "Select Communicator edition" and the instruction is "Please select which edition of Communicator you want to use.". Below this, it says "The following editions are available for your account. Please select one of them:". A dropdown menu shows "Business" selected. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

Finally Select the Phone Configuration to Use. Note the softphone is not available in the Office Edition.



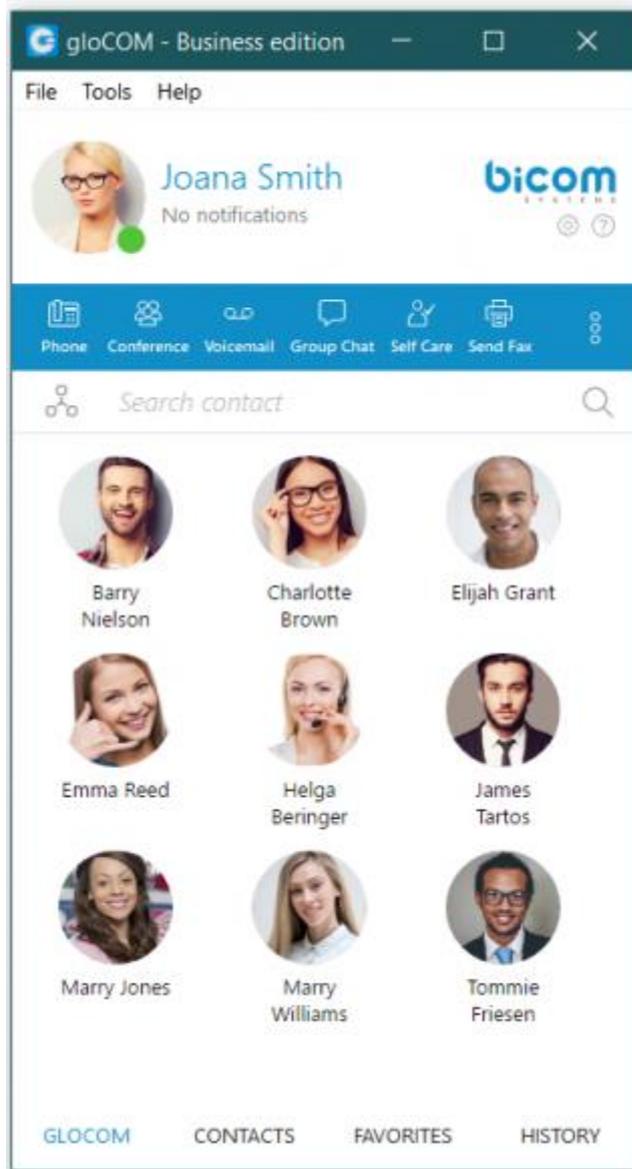
You are now ready to login



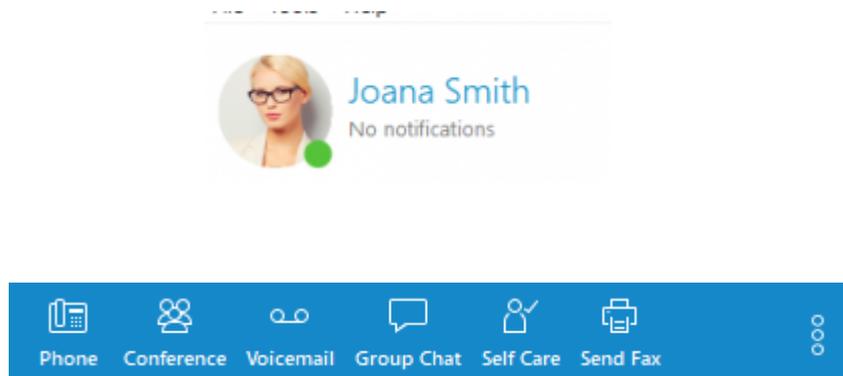
4 MAIN SCREEN & MAIN FEATURES

Once you have configured Cloud Communicator and successfully signed in you will be able to begin using the Cloud Communicator main features. All of the main features are accessed from the main screen.

The main screen and feature access is described in the below overview diagram.



4.1 Functions Area



- **User image**
A user-defined image that is displayed on the user's profile.
You can change your avatar image by clicking on your current avatar and a new window will appear with avatar settings. Browse for the image from your computer and set the preferred image options.
Communicator now supports higher resolution avatars, allowing users to set up any resolution between 256x256 and 512x512 pixels
- **Username**
User defined name which is shown in your chat conversations.
- **Missed Calls**
Displays any missed calls or reads No Missed Calls.
- **Status and Status Message**
If left-clicked, a menu will open. The user will be able to choose his availability: Online, Busy, Do not Disturb, Away, and/or Offline. In My Settings -> Status, users can set their personal messages or news and upload their profile picture.
- **Phone**
Opens a softphone window next to the Communicator main window.
- **Conference**
Opens a Voice conference window next to the Communicator main window.
- **Voicemail**
Opens a Voicemail window next to the Communicator main window.
- **Group Chat**
Opens a Group Chat window next to the Communicator main window.
- **Online Self Care**
Logs into your online self care portal
- **Send Fax**
Offers the choice to send a fax or view received faxes. Based on your choice, an additional window will open next to Communicator.
- **Surveillance Camera**
Opens up a Surveillance Camera preview. This option will work only if you have your surveillance camera set up on the IP address in Tools --> Preferences --> Video --> Surveillance Camera.
- **Parked calls:**

Once a call is parked, it can be picked up by anyone at any location by dialing the parked extension.

- **My Dialer**

Accesses the Personalised Dialer Panel. Here you can upload your own contacts using a CSV format:

101,Joana Smith
102,James Tartos

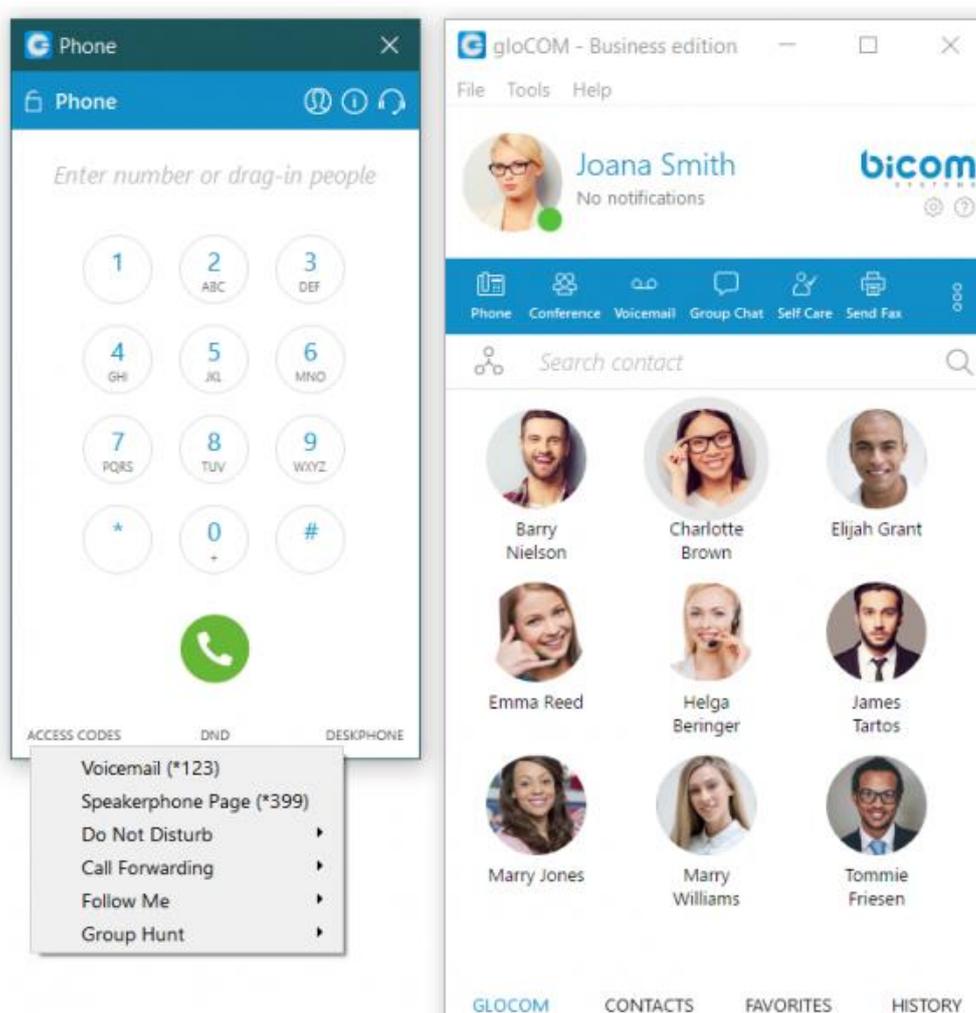
- **Preferences**

Opens a Preferences window. Refer to the Preferences chapter for detailed instructions

4.2 Phone Area

The Phone Area includes

- A dial keypad for making calls. Calls will be made using built in softphone or linked IP handset depending on Phone Configuration settings under Preferences
- Drag and drop functionality for making calls



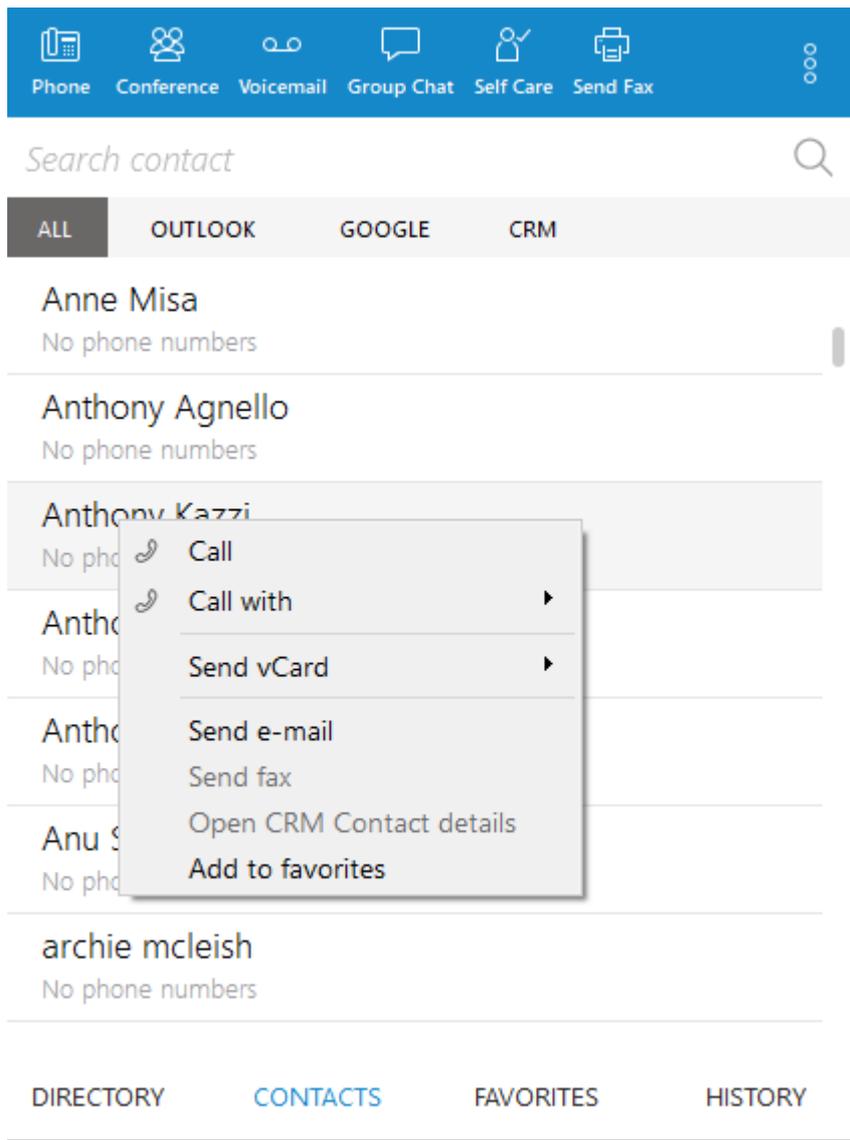
4.3 Directory and Contacts

Directory will display Extension and Presence information of the extensions on the PBX

Contacts will display Microsoft Outlook/Exchange/Google Contacts/ CRM Contacts. These contacts will be searched whenever a new call is received. If the number is recognized a pop-up with the contact's name will be displayed on your screen.

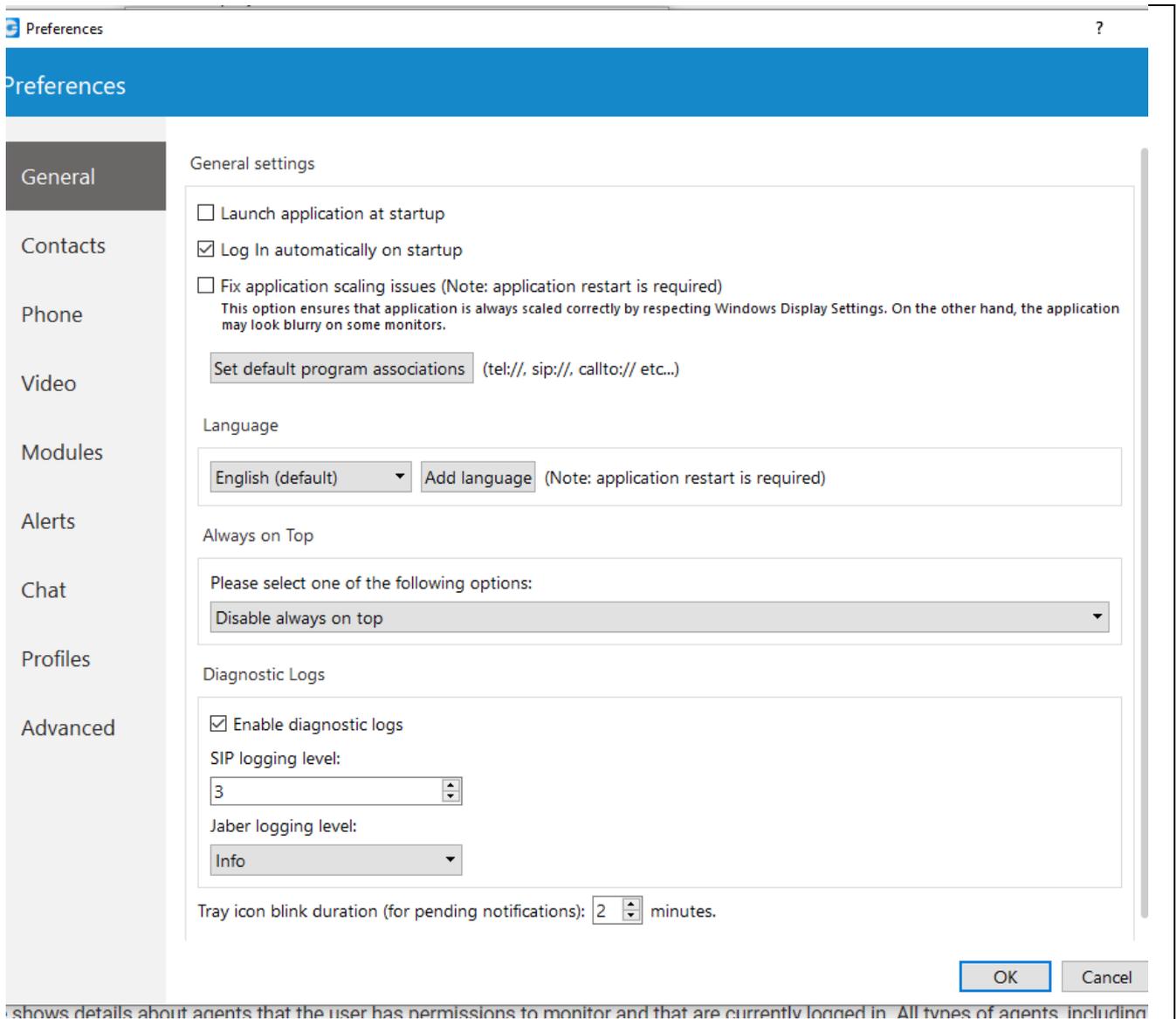
Favorites will list all your contacts marked as favourites

You can use click-to-call to make a call to a contact using either your softphone or deskphone



5 PREFERENCES

Communicator preferences can be configured under Tools->Preferences



Preferences

Preferences

General

General settings

Launch application at startup

Log In automatically on startup

Fix application scaling issues (Note: application restart is required)
This option ensures that application is always scaled correctly by respecting Windows Display Settings. On the other hand, the application may look blurry on some monitors.

Set default program associations (tel://, sip://, callto:// etc...)

Language

English (default) Add language (Note: application restart is required)

Always on Top

Please select one of the following options:
Disable always on top

Diagnostic Logs

Enable diagnostic logs

SIP logging level:
3

Jaber logging level:
Info

Tray icon blink duration (for pending notifications): 2 minutes.

OK Cancel

shows details about agents that the user has permissions to monitor and that are currently logged in. All types of agents, including

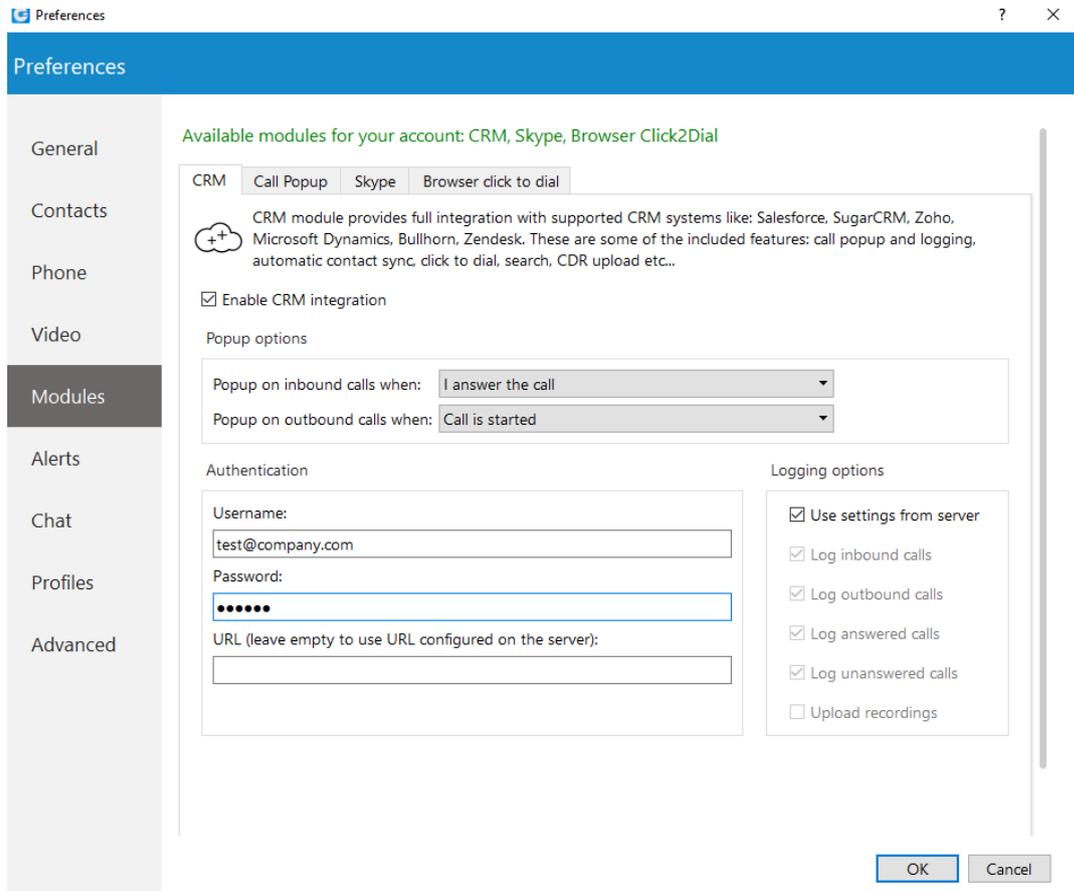
Preference	Details
Contacts	Configure Google and Outlook Contact settings
Phone	Configure Softphone and Desktop Phone control
Video	Configure Video settings
Modules	Configure CRM login and Screen Pop options
Alerts	How Communicator should react to incoming calls and messages
Chat	Chat configuration

Profile	Multiple Profile configuration for different Logins.
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5.1 CRM Configuration

To integrate with a supported CRM goto Preferences->CRM and then enable and configure the required settings.

Please enter the username and password required to access your CRM, and any required logging settings.



The screenshot shows the 'Preferences' dialog box with the 'Modules' section selected. The 'CRM' tab is active, showing the following configuration options:

- Available modules for your account:** CRM, Skype, Browser Click2Dial
- CRM module description:** CRM module provides full integration with supported CRM systems like: Salesforce, SugarCRM, Zoho, Microsoft Dynamics, Bullhorn, Zendesk. These are some of the included features: call popup and logging, automatic contact sync, click to dial, search, CDR upload etc...
- Enable CRM integration**
- Popup options:**
 - Popup on inbound calls when: I answer the call
 - Popup on outbound calls when: Call is started
- Authentication:**
 - Username: test@company.com
 - Password: [masked]
 - URL (leave empty to use URL configured on the server): [empty]
- Logging options:**
 - Use settings from server
 - Log inbound calls
 - Log outbound calls
 - Log answered calls
 - Log unanswered calls
 - Upload recordings

Buttons: OK, Cancel

5.2 Call Popup

This feature is useful when you have a Web based CRM that isn't supported by Cloud PBX. Using a URL or an application path and predefined macros it is possible to generate useful screen pops when a call is started/answered and finished.

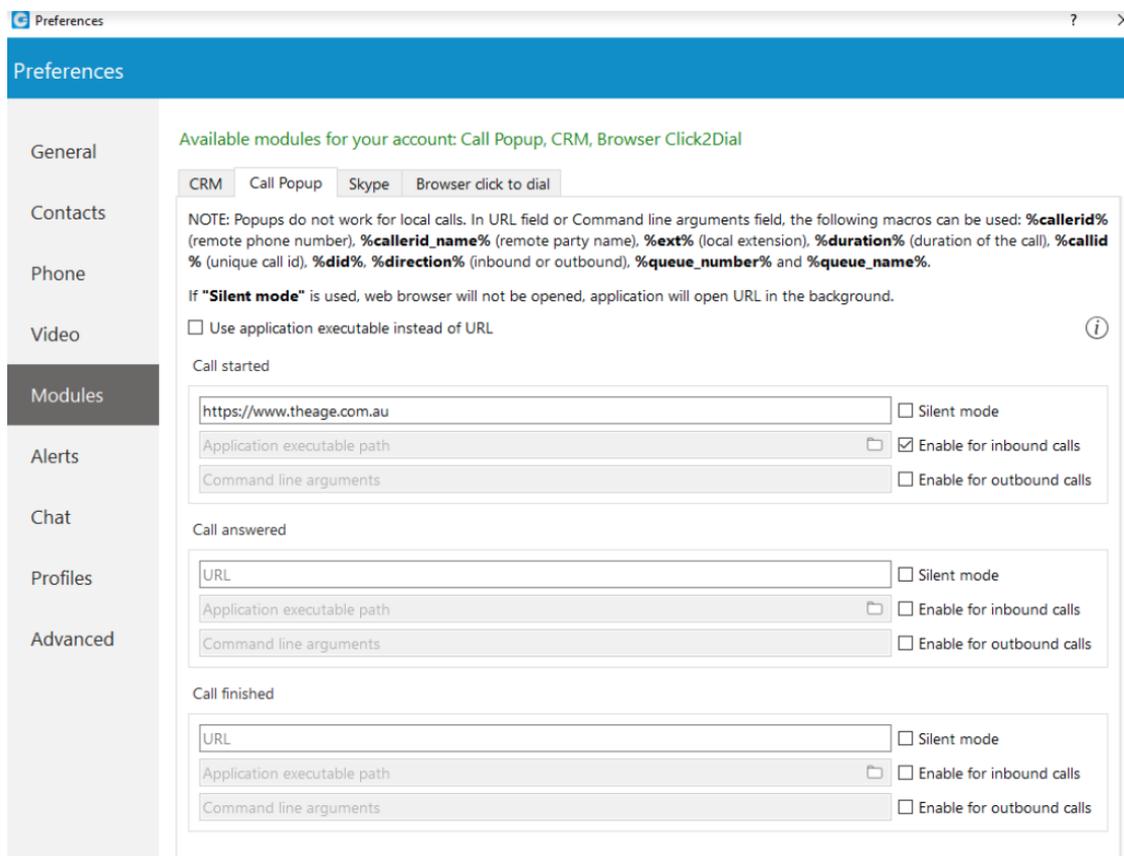
To integrate with an unsupported Web based CRM goto Preferences->Call Popup and then enable and configure the required settings.

For example let's assume you'd like to get a screen pop on inbound calls by getting your CRM to perform a lookup on the inbound cli.

So let's say you have an inbound call from 0388888888 to extension 777 and let's assume your CRM would generate this lookup with a URL like the following:

`http://mycrmserver.com.au?cli=0388888888?direction=inbound?ext=777`

To configure this in communicator do as follows:



The screenshot shows the 'Preferences' window with the 'Modules' section selected. Under the 'CRM' module, the 'Call Popup' tab is active. The interface includes a sidebar with categories like General, Contacts, Phone, Video, Modules, Alerts, Chat, Profiles, and Advanced. The main content area displays configuration options for 'Call started', 'Call answered', and 'Call finished'. Each event type has fields for 'URL', 'Application executable path', and 'Command line arguments', along with checkboxes for 'Silent mode', 'Enable for inbound calls', and 'Enable for outbound calls'. A note at the top explains that macros like %callerid%, %callerid_name%, %ext%, %duration%, %callid%, %did%, %direction%, %queue_number%, and %queue_name% can be used in the URL and command line arguments fields. It also states that if 'Silent mode' is used, the web browser will not be opened.

