



# Desktop Cloud Communicator Guide

## Version 4

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The purpose of this document is to provide an overview of Cloud Communicator Desktop Version 4 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.

## COMMUNICATOR VERSIONS

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

- Office
- Business
- Supervisor

The table below compares the different Desktop versions

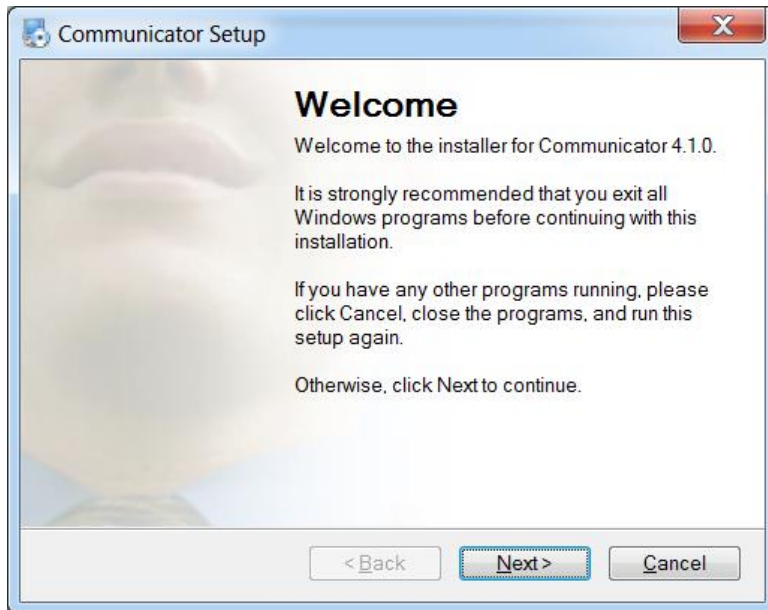
Version	Office	Business	Supervisor
Softphone		yes	yes
Google Contacts	yes	yes	yes
Outlook Contacts	yes	yes	yes
Multiple Profiles	yes	yes	yes
Desk phone control	yes	yes	yes
FAX support	yes	yes	yes
CRM Integration	yes (optional)	yes (optional)	yes
Supervisor Panel			yes

## 2. INSTALLATION OF CLOUD COMMUNICATOR

Latest copies of Cloud Communicator are available from, the Cloud PBX Web Site at [www.cloudpbx.net.au](http://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.

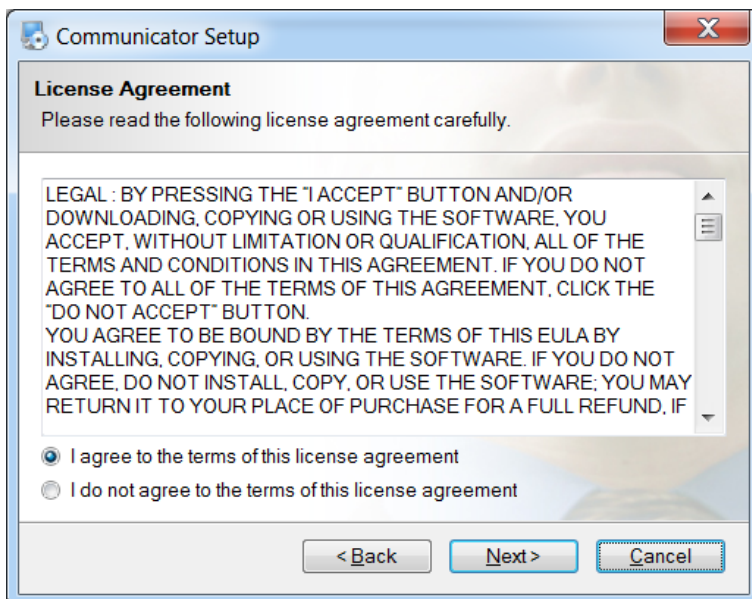
## Welcome

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



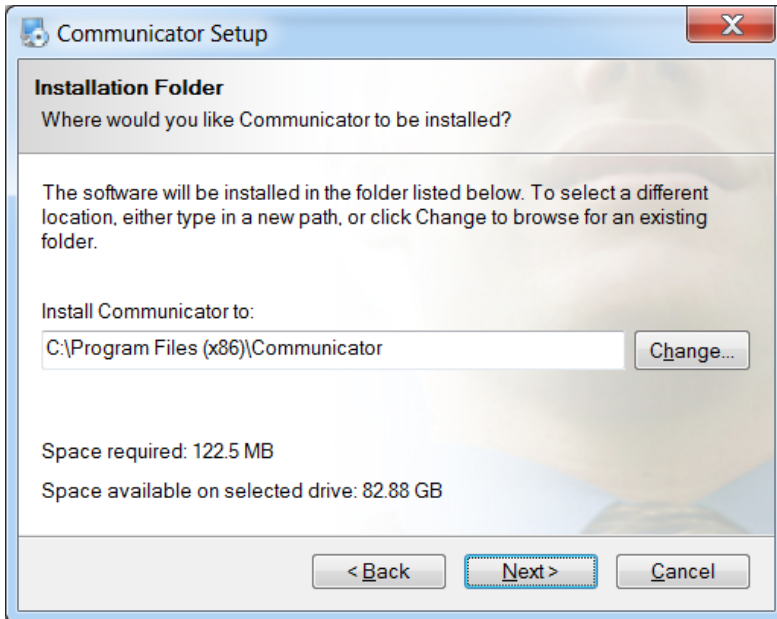
## License Agreement

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.



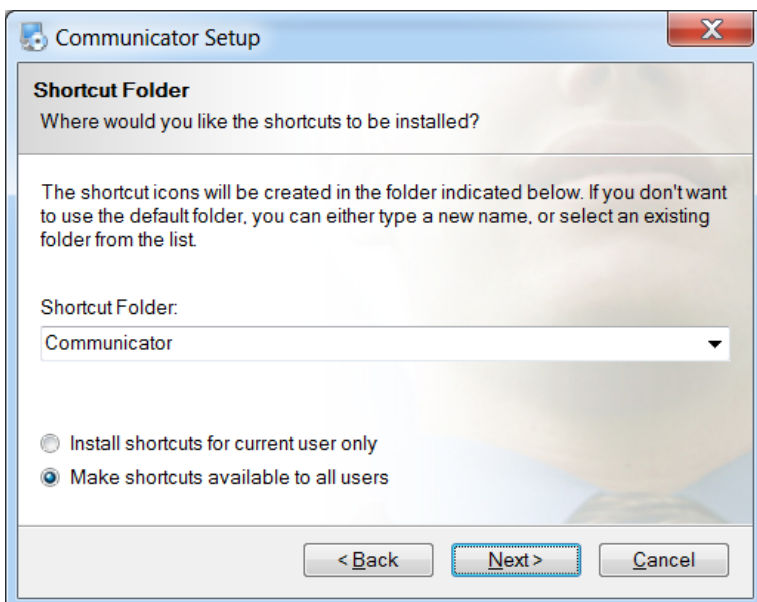
## Installation Folder

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.



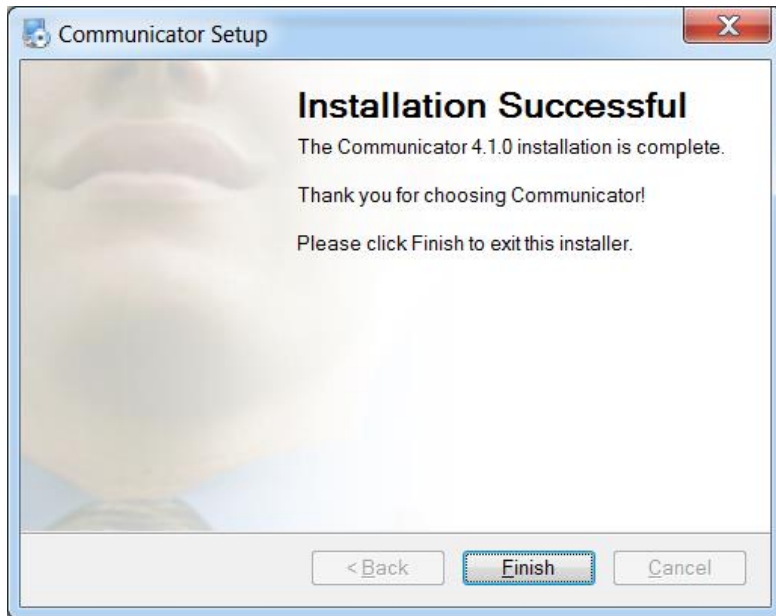
### Shortcut Folder

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.



### Installation Successful

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



### Profile Wizard

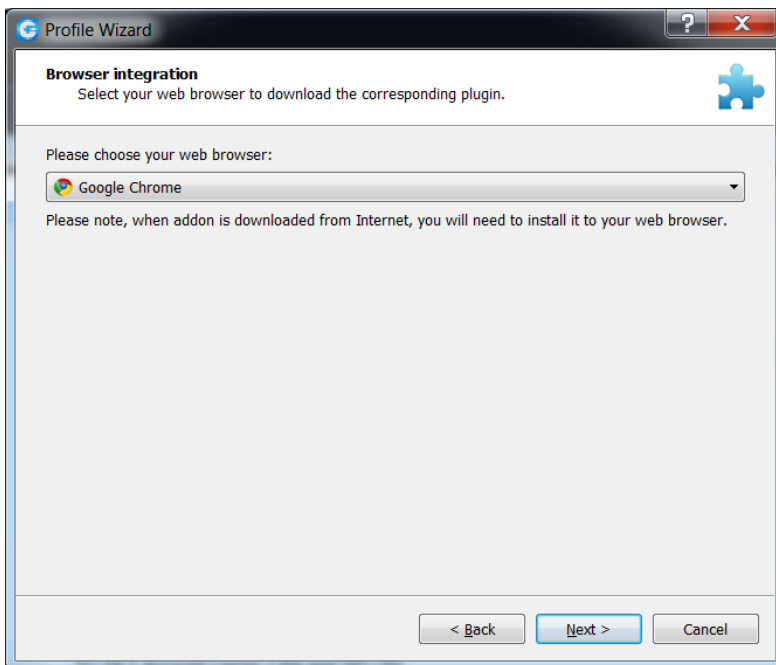
Now run the Profile Wizard to configure Communicator.

To run the Profile Wizard ensure you have the following details

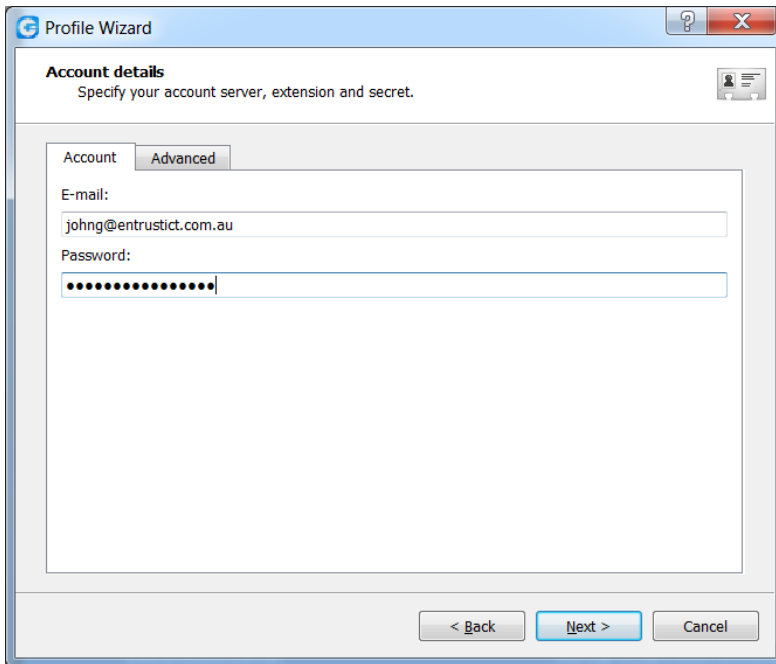
Field	Description
Email Address	The Email Address assigned to the extension you want to use on the PBX. The same Email Address can be used for multiple extensions but the passwords must be different.
Password	The User Password associated with the Email Address
Login Server	The Login Server for the PBX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

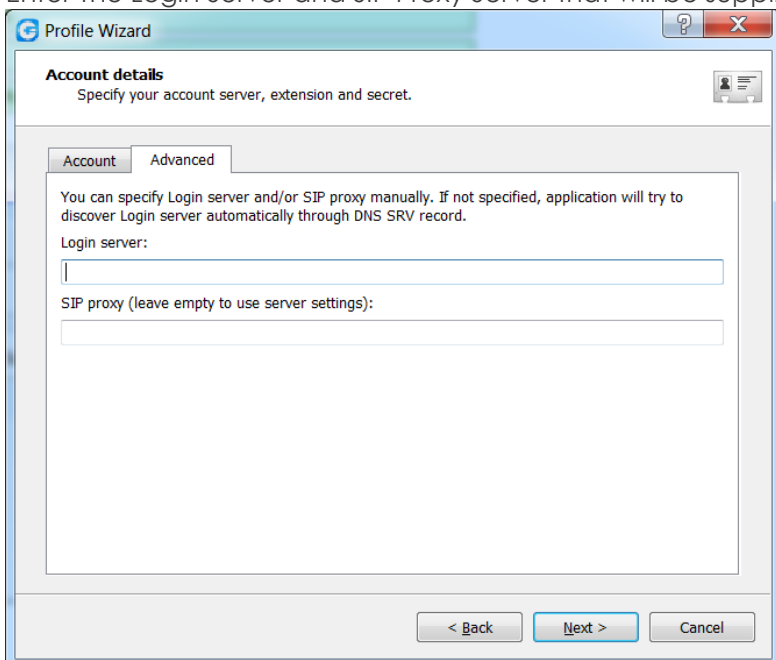


Enter your Email Address and User Password that will be provided to you by the PBX Administrator.



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 are three buttons: '< Back', 'Next >', and 'Cancel'.

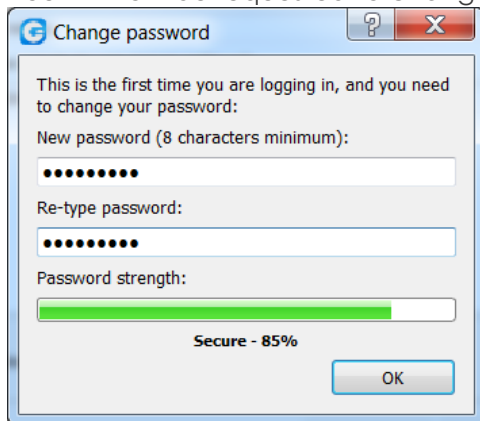
Enter The Login Server and SIP Proxy Server that will be supplied by the PBX Administrator



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 area with the instruction: '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 are three buttons: '< Back', 'Next >', and 'Cancel'.



You will now be requested to change your User Password



**Change password**

This is the first time you are logging in, and you need to change your password:

New password (8 characters minimum):  
••••••••

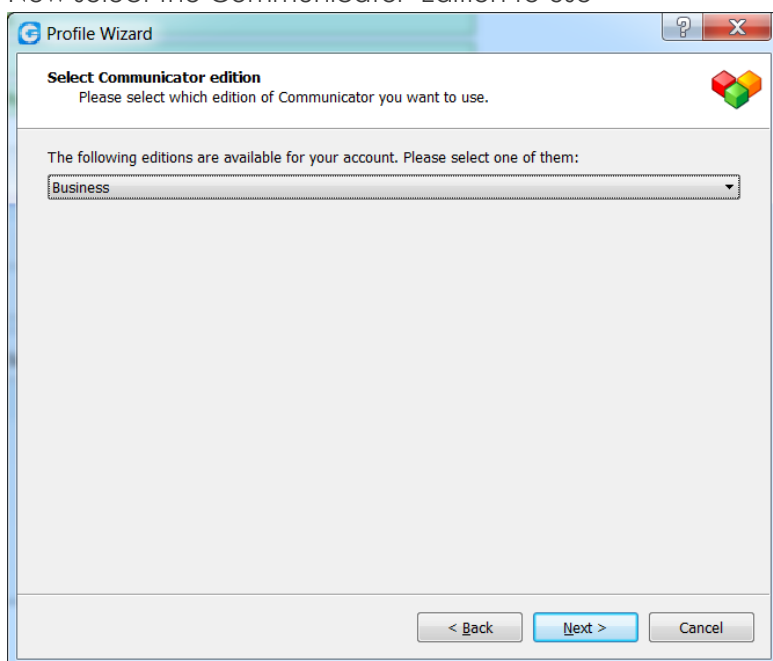
Re-type password:  
••••••••

Password strength:  
[Progress bar: 85% green]

Secure - 85%

OK

Now select the Communicator Edition to Use



**Profile Wizard**

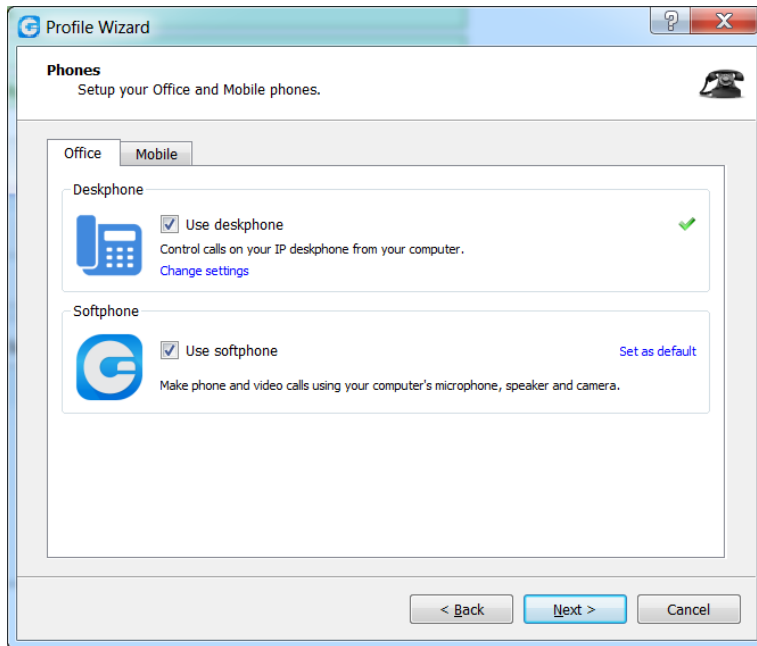
**Select Communicator edition**  
Please select which edition of Communicator you want to use.

The following editions are available for your account. Please select one of them:

Business

< Back   Next >   Cancel

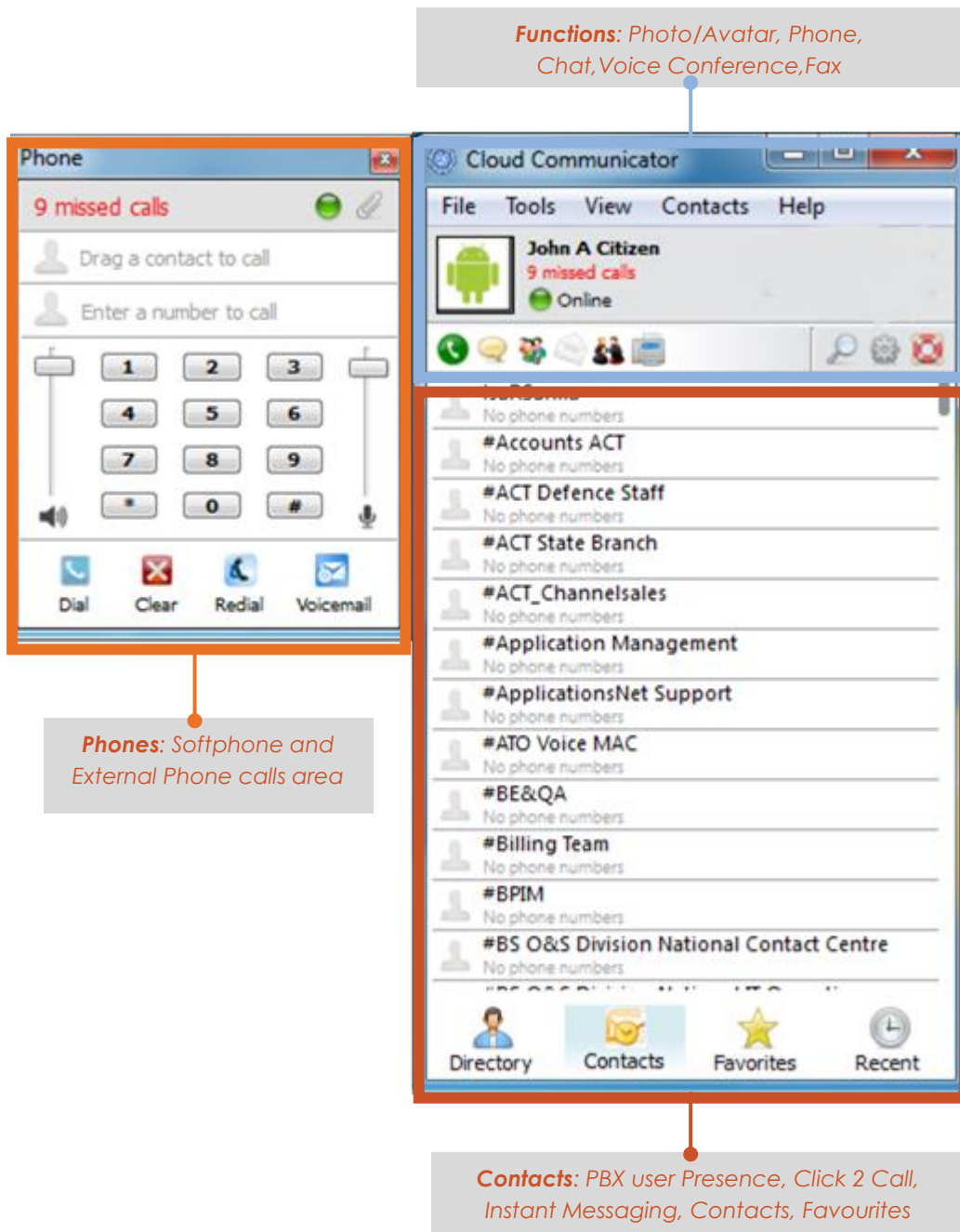
Finally Select the Phone Configuration to Use. Note the softphone is not available in the Office Edition.



### 3. 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.

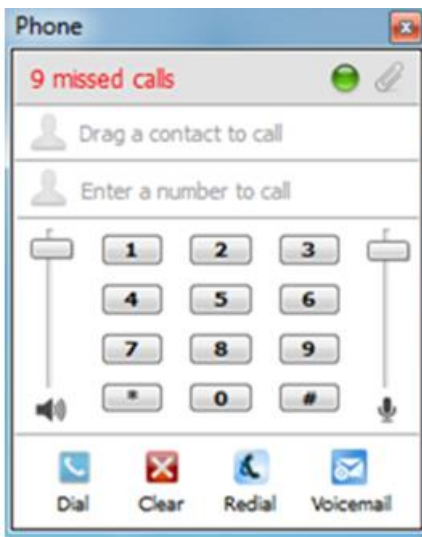


## Functions Area



This area is where you can upload your photo or avatar, display a public message and tell users your availability for calls or Instant Messaging requests. You can also initiate phone calls, chatting, faxing, and conferences using this area.

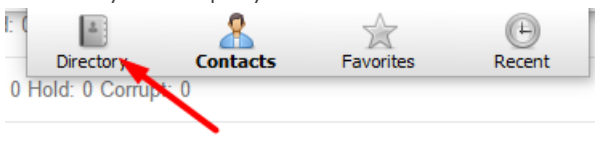
## Phone Area



This area is used to make and receive calls from the Soft Phone directly, for monitoring external Deskphone calls and for initiating any phone transfers (via drag and drop) to any of the other PBX destinations. You can also park calls from within this area.

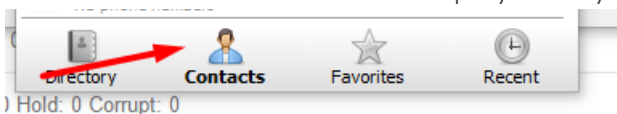
## Directory and Contacts

Directory will display Extension and Presence information of the PBX



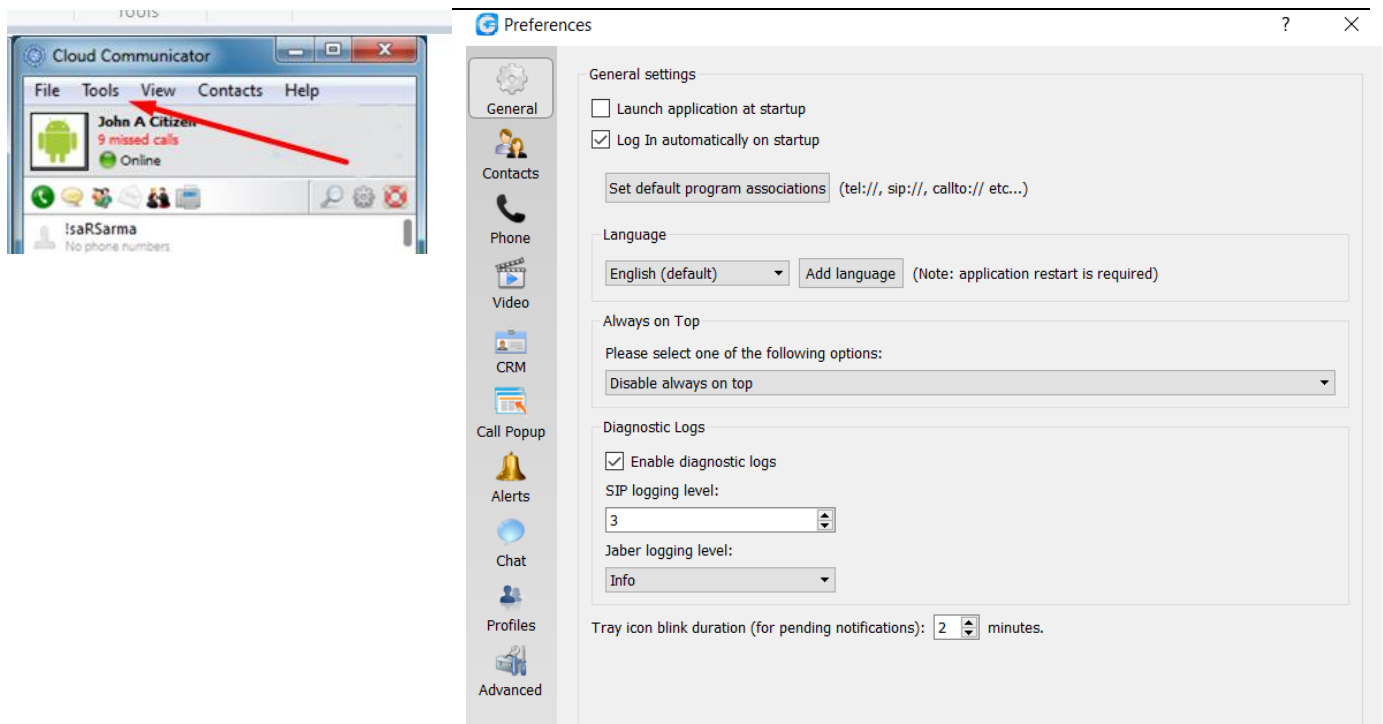
Contacts will display Microsoft Outlook/Exchange/Google Contacts/ CRM Contacts.

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.



## Preferences

Communicator preferences can be configured under Tools->Preferences

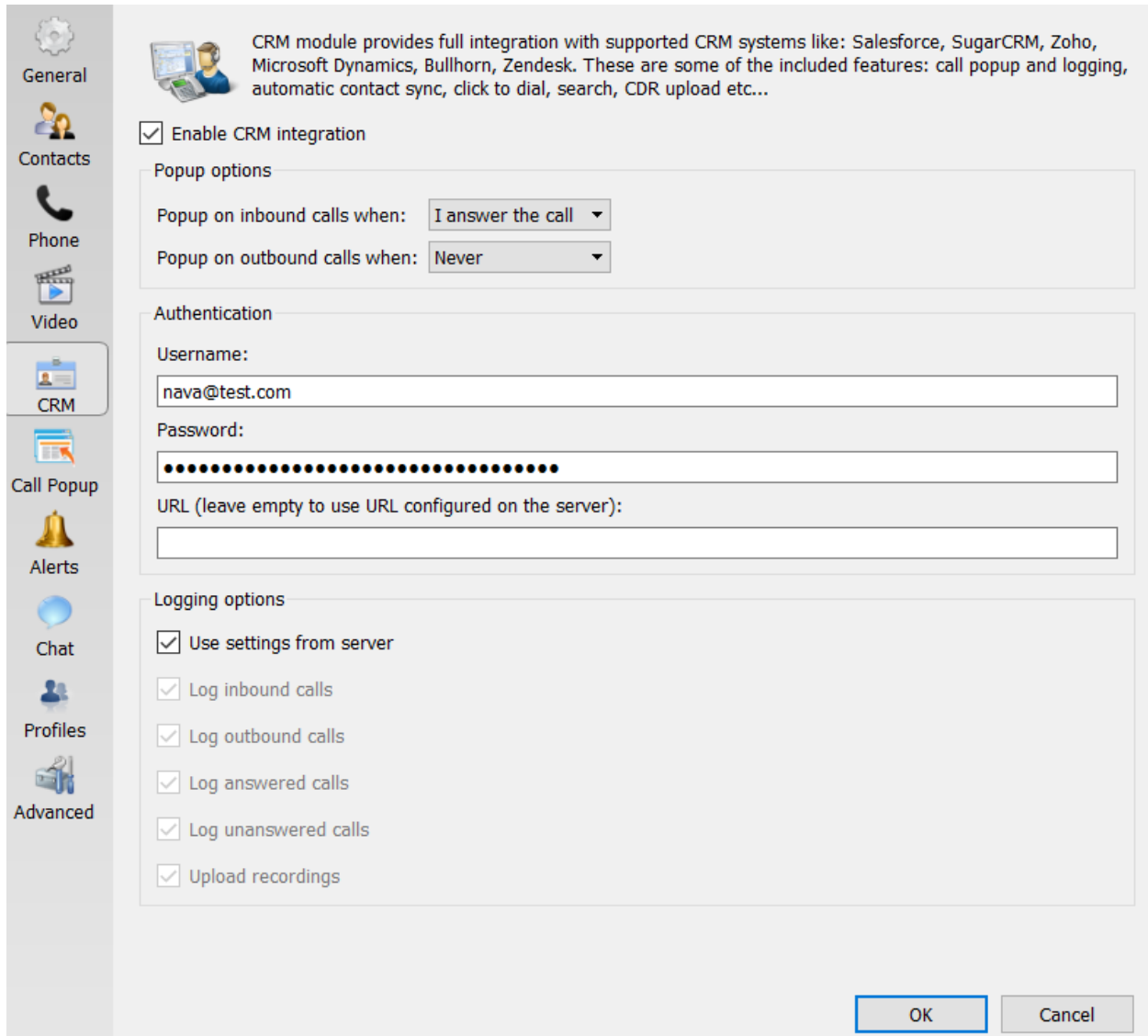


Preference	Details
Contacts	Configure Google and Outlook Contact settings
Phone	Configure Softphone and Desktop Phone control
Video	Configure Video settings
CRM	Configure CRM login and Screen Pop options
Call Popup	
Alerts	How Communicator should react to incoming calls and messages
Chat	Chat configuration
Profile	Multiple Profile configuration for different Logins.

## 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.



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:

Popup on outbound calls when:

Authentication

Username:

Password:

URL (leave empty to use URL configured on the server):

Logging options

Use settings from server

Log inbound calls

Log outbound calls

Log answered calls

Log unanswered calls

Upload recordings

## Call Popup

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

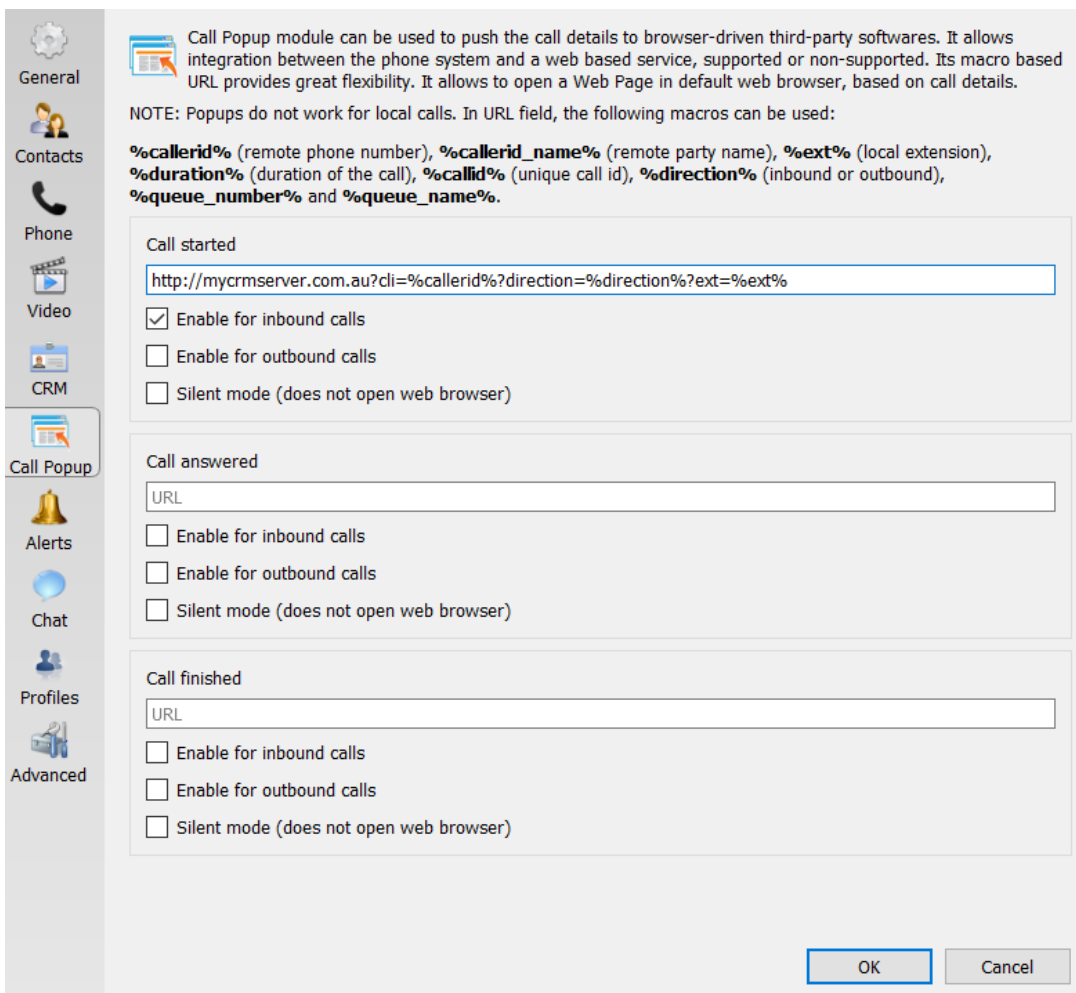
To integrate with an unsupported Web based CRM goto Preferences->Call Popup and then enable and configure the required settings.

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 038888888 to extension 777 and let's assume your CRM would generate this lookup with a URL like the following:

`http://mycrmserver.com.au?cli=038888888?direction=inbound?ext=777`

To configure this is communicator do as follows:



Call Popup module can be used to push the call details to browser-driven third-party softwares. It allows integration between the phone system and a web based service, supported or non-supported. Its macro based URL provides great flexibility. It allows to open a Web Page in default web browser, based on call details.

NOTE: Popups do not work for local calls. In URL field, the following macros can be used:

**%callerid%** (remote phone number), **%callerid\_name%** (remote party name), **%ext%** (local extension), **%duration%** (duration of the call), **%callid%** (unique call id), **%direction%** (inbound or outbound), **%queue\_number%** and **%queue\_name%**.

**Call started**

URL: `http://mycrmserver.com.au?cli=%callerid%?direction=%direction%?ext=%ext%`

Enable for inbound calls  
 Enable for outbound calls  
 Silent mode (does not open web browser)

**Call answered**

URL: URL

Enable for inbound calls  
 Enable for outbound calls  
 Silent mode (does not open web browser)

**Call finished**

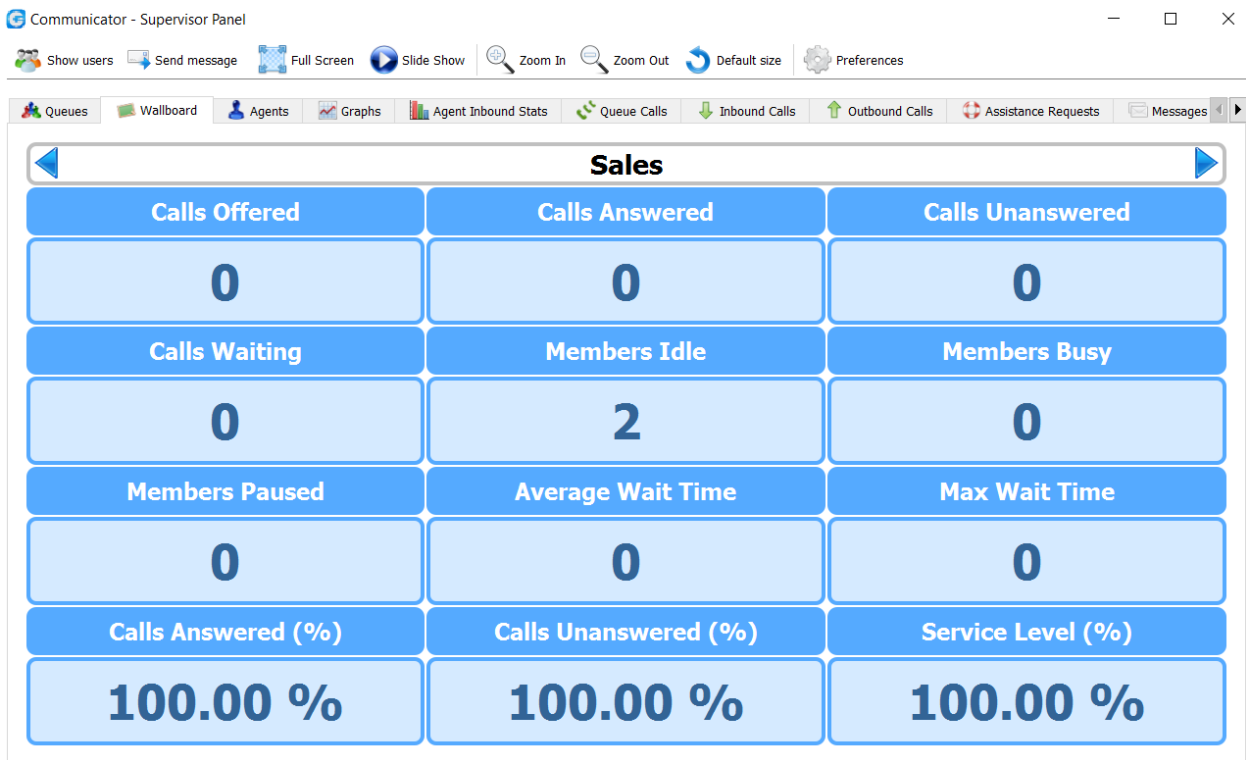
URL: URL

Enable for inbound calls  
 Enable for outbound calls  
 Silent mode (does not open web browser)

OK Cancel

## Supervisor Panel

The Supervisor Edition of Cloud Communicator has a Supervisor Panel that is accessed under the Functions Area. This Panel allows you to view Queue and Agent Statistics and provides a Wallboard screen.



Communicator - Supervisor Panel

Show users Send message Full Screen Slide Show Zoom In Zoom Out Default size Preferences

Queues Wallboard Agents Graphs Agent Inbound Stats Queue Calls Inbound Calls Outbound Calls Assistance Requests Messages

Sales		
<b>Calls Offered</b>	<b>Calls Answered</b>	<b>Calls Unanswered</b>
<b>0</b>	<b>0</b>	<b>0</b>
<b>Calls Waiting</b>	<b>Members Idle</b>	<b>Members Busy</b>
<b>0</b>	<b>2</b>	<b>0</b>
<b>Members Paused</b>	<b>Average Wait Time</b>	<b>Max Wait Time</b>
<b>0</b>	<b>0</b>	<b>0</b>
<b>Calls Answered (%)</b>	<b>Calls Unanswered (%)</b>	<b>Service Level (%)</b>
<b>100.00 %</b>	<b>100.00 %</b>	<b>100.00 %</b>