



Basic Functions of the CloudPBX Desktop app

CloudPBX
by real world

About this document

This guide is intended as an instruction on basic functions only. It covers the functionality broadly and your system might have slightly different features in place for call flow or voicemail.

Please note that images in this document may differ slightly in appearance to the appearance of your CloudPBX desktop extension depending on the make and model of your computer and it's operating system.

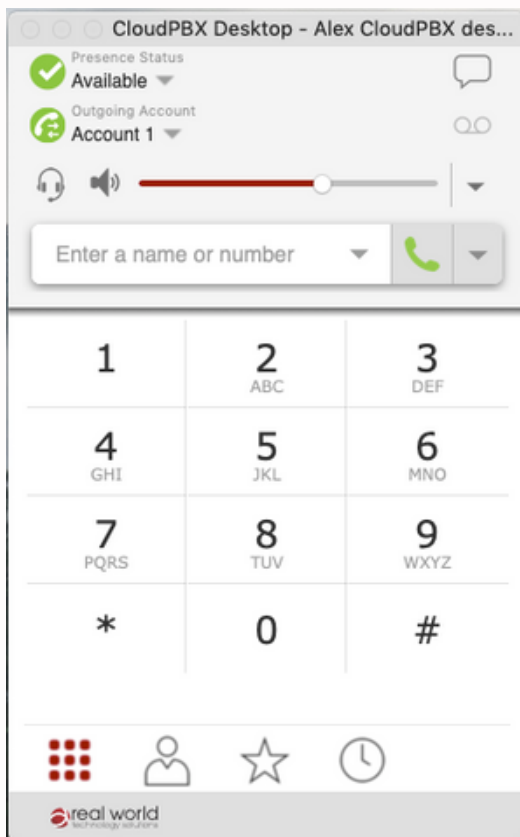
Using the CloudPBX Desktop App

CloudPBX Desktop App is a softphone application that runs on your computer. It has its own dedicated extension separate to any physical phone or CloudPBX Mobile app you may have.

It has many of the same features as a physical desk phone, enabling you to make and receive calls, transfer calls to internal extensions or outbound numbers (i.e. transfer to a mobile), and place calls on hold like you would with your physical desk phone.

What does cloudPBX Desktop look like?

When open, your CloudPBX desktop app should look something like this:



You'll notice your extension will be listed up the top of the app. You may also find that many of the buttons are fairly familiar.

At the top of the app you can see and change your extension status, change the volume, check for for voicemail messages.

From the menu at the bottom you can navigate the various displays.

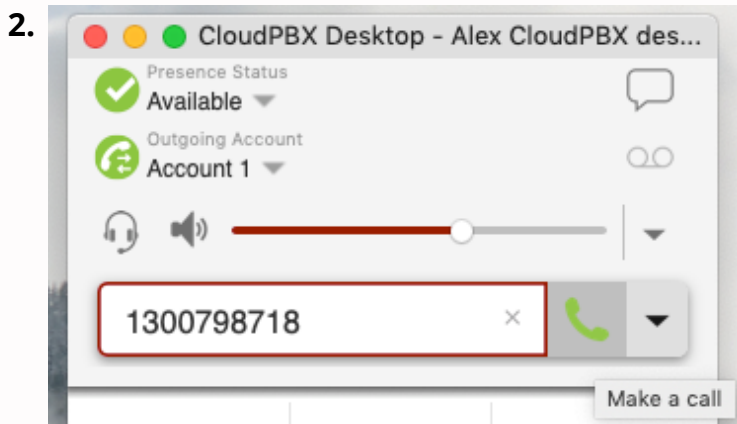
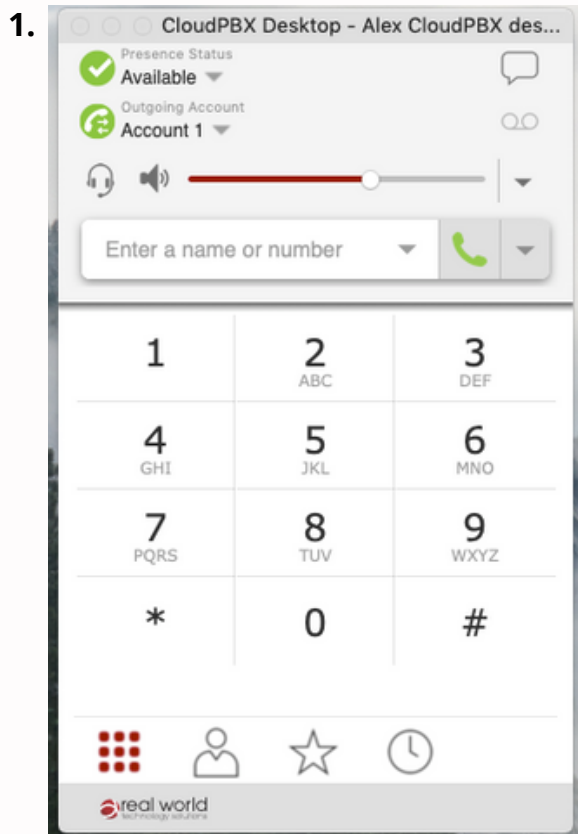


Making a call

To make a call, navigate to the dial pad screen.

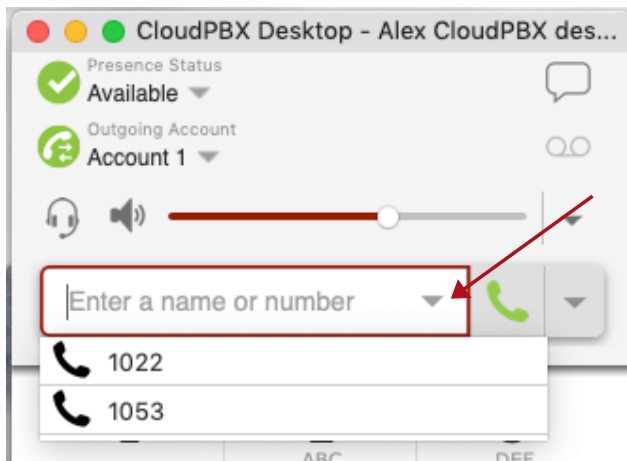
You can then either key in the number on your computer keyboard or click the buttons on the app's keypad using your mouse.

Next click on the Green Phone button or press enter to dial the number.



You can also selected a previously called number via the dropdown arrow next to the number textbox.

Please note selecting a number this way will dial the number straight away.



Receiving a call

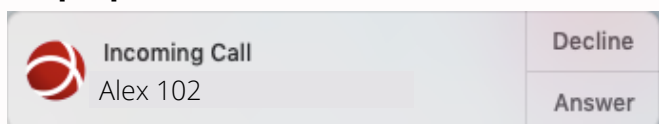
Please note you will only be notified of incoming calls if your extension is set as available. See the section on *Do Not Disturb* function for further information.

Notifications for incoming calls come in a few ways with both **audio** and **visual** notifications.

Audio notification (i.e. ringing) will occur. It is played through your computer's audio and is set at your computer's levels. e.g. if you have your computer audio settings muted or the volume turned down really low, you may not hear the ring. If you are wearing a headset, the ring will play through the headphones. The volume symbol next to the headset will appear with a line through it to indicate if the speaker is on Mute. You can unmute or change the volume settings in the app via the slider.

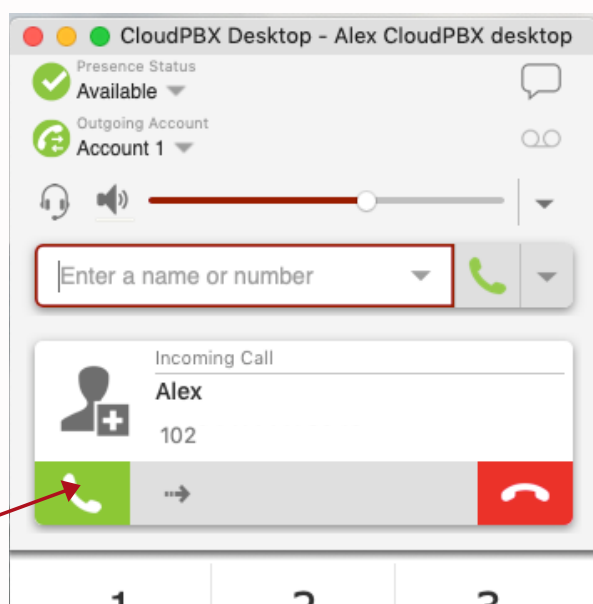
Visual notification of an incoming call comes in a couple of ways; as a pop up notification if the app is minimised, or it will also display in the open app. In both cases the notification will include the caller ID.

Pop-up notification:



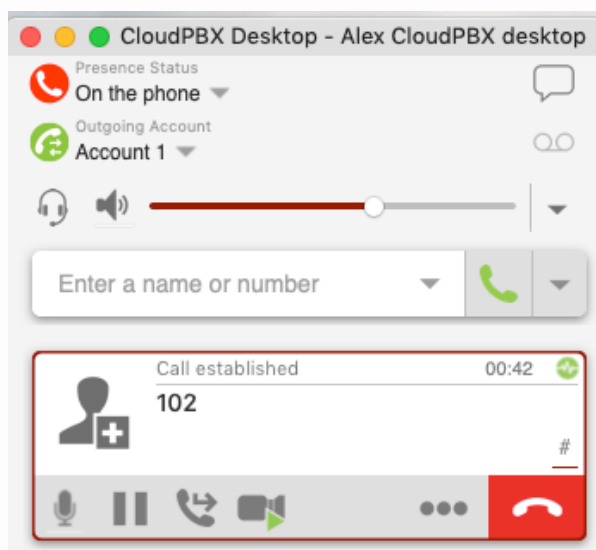
To answer either click on *Answer* in the pop-up or the Green Phone Button on the incoming call in the app.

In-app notification:



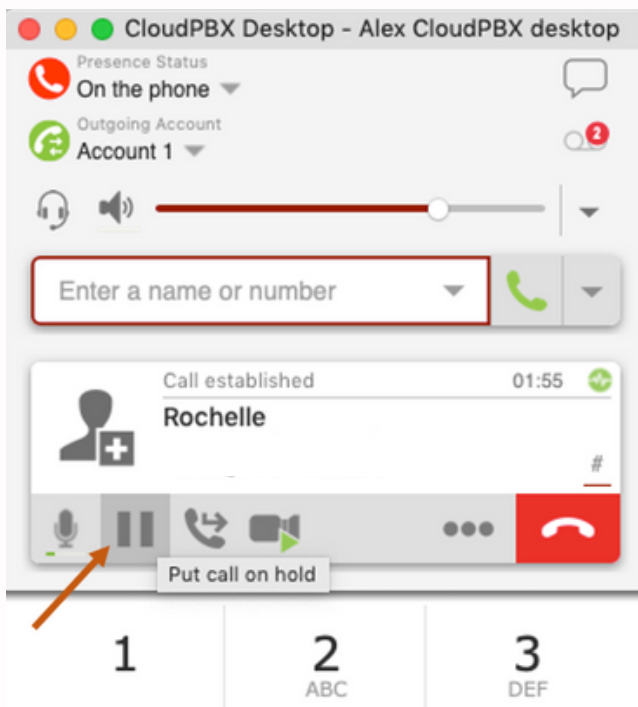
Once the call has connected you will see it's status change from *Incoming call* to *Call established*.

A menu will also appear below the call giving you access to options for further actions like placing the call on hold or transferring the call.

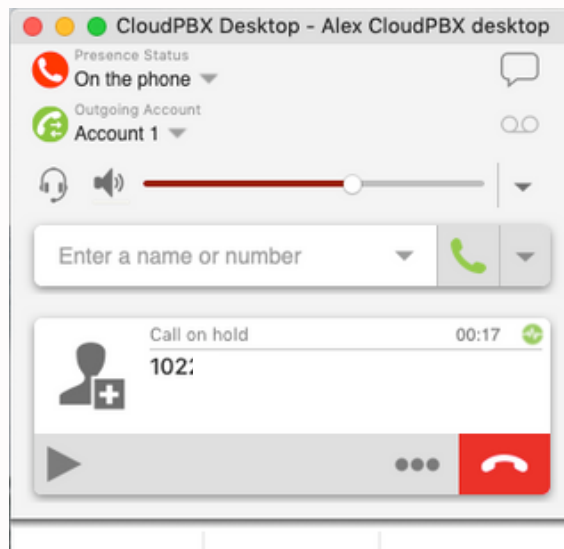


Putting a call on hold

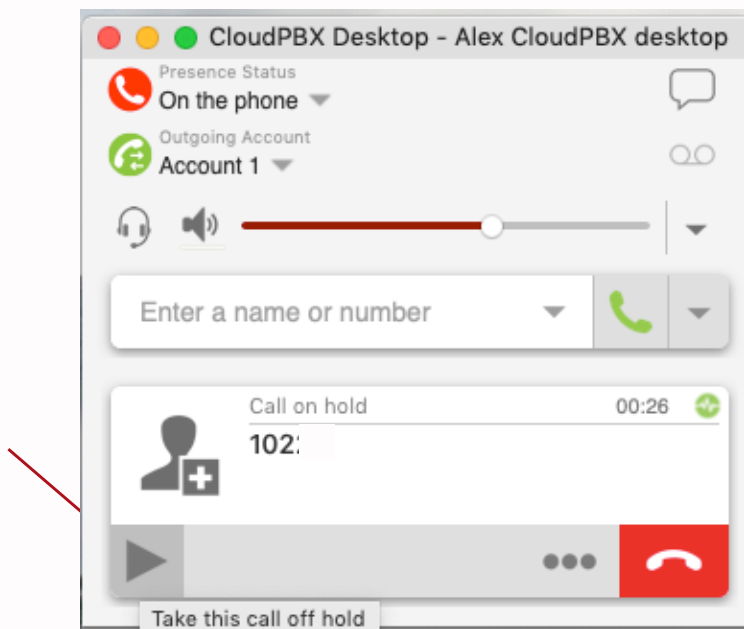
You can place an established call on hold by selecting the pause button on the call's menu options:



When a call is on hold it should look like this:

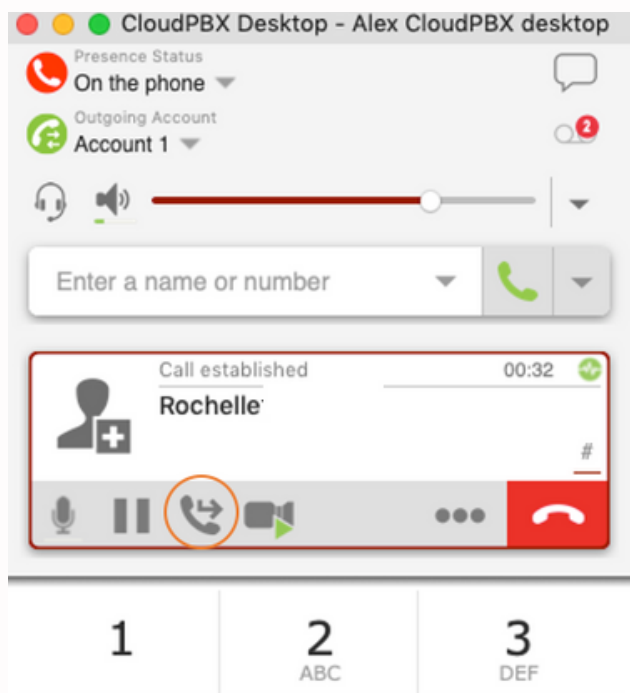


To retrieve the call click on the Play button:

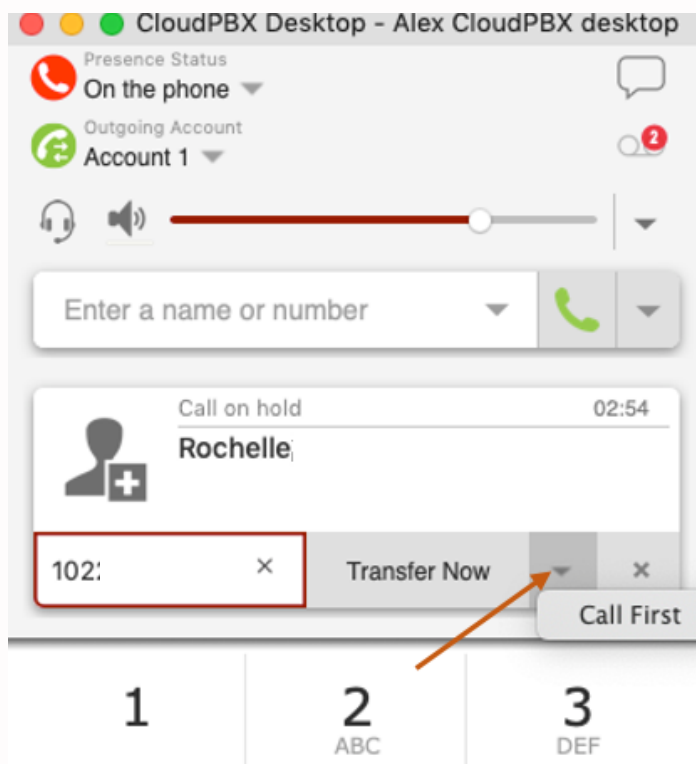


Transferring a call

You can Transfer an established call by selecting the Transfer button on the call's menu options. It looks like this:



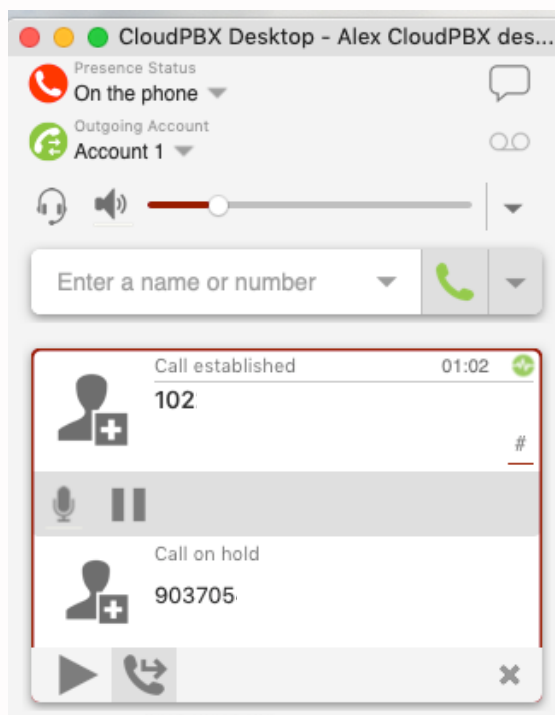
Then it will give you the option to key in the number you want to transfer to - either an internal extension number or an external number like a mobile number. Note that as with a physical desk phone, transfers can either be announced (where you speak to the transferee first) or unannounced (call goes straight to transferee).



Transferring a call (continued)

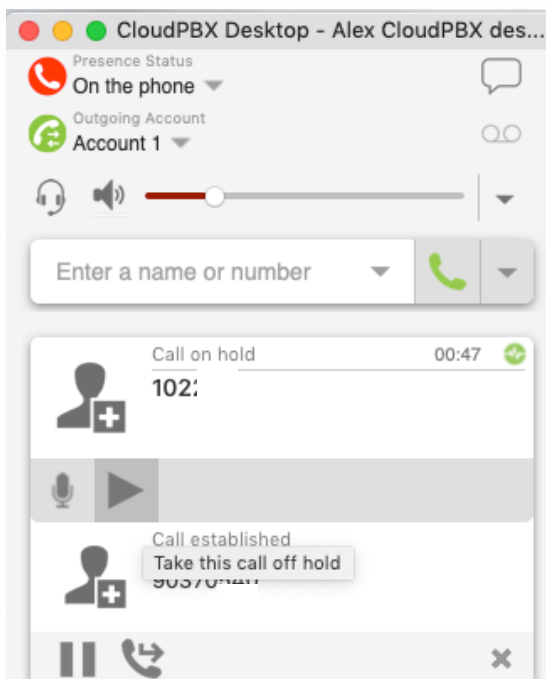
To make an **announced transfer**, click the dropdown arrow next to the *Transfer Now* option, this will allow you to speak with the transferee before transferring the call to them.

A secondary call will open up, and your initial call will be on hold:



- original call

- call to transferee



While you're speaking to the transferee, the original caller will automatically go on hold. You can speak to them again by pressing the Play button next to their call (and the transferee call will go on hold).

If the transferee is unavailable, you can disconnect their call via the small 'x' in the menu underneath their call.

If they are available, pick up the original call (1022 in this example), then click the transfer button again to transfer it.

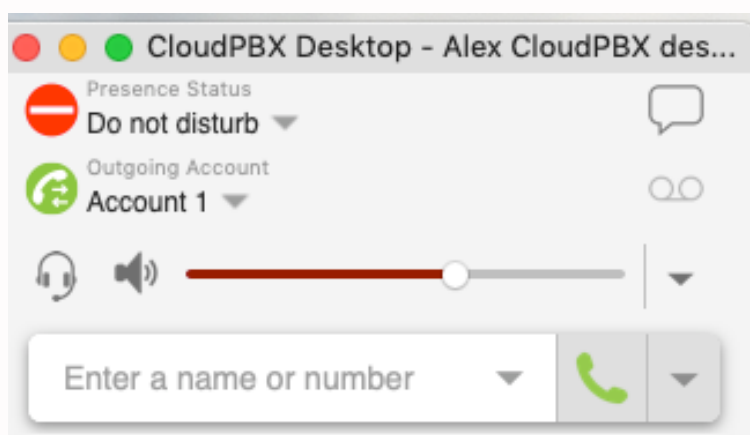
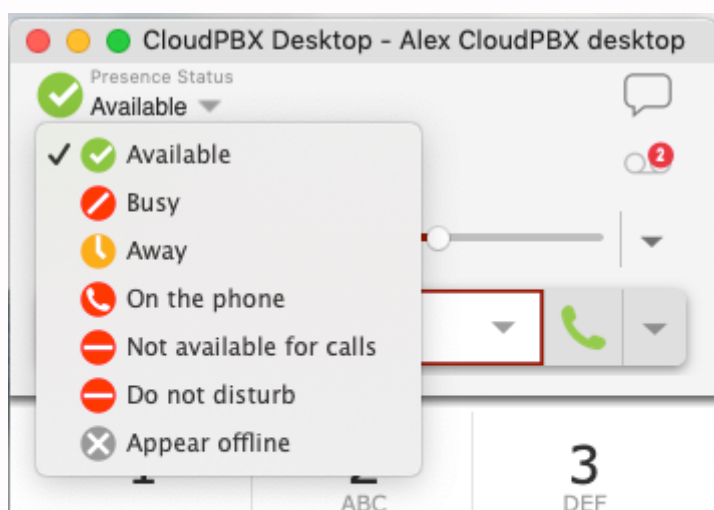
Do Not Disturb

As with a physical phone extension, you can set your self to away or Do Not Disturb. Note that as with a physical phone, DND will stop your CloudPBX desktop app from receiving calls. Pending the call flow you have in place on your system, this may mean calls skip a stage of the call flow.

You can check the status of your extension at the top of the app. The icon should be green and the present status available to receive calls.

To set your extension to DND, click on the drop down arrow next to your status. A menu of options will appear. Select *Do Not Disturb*.

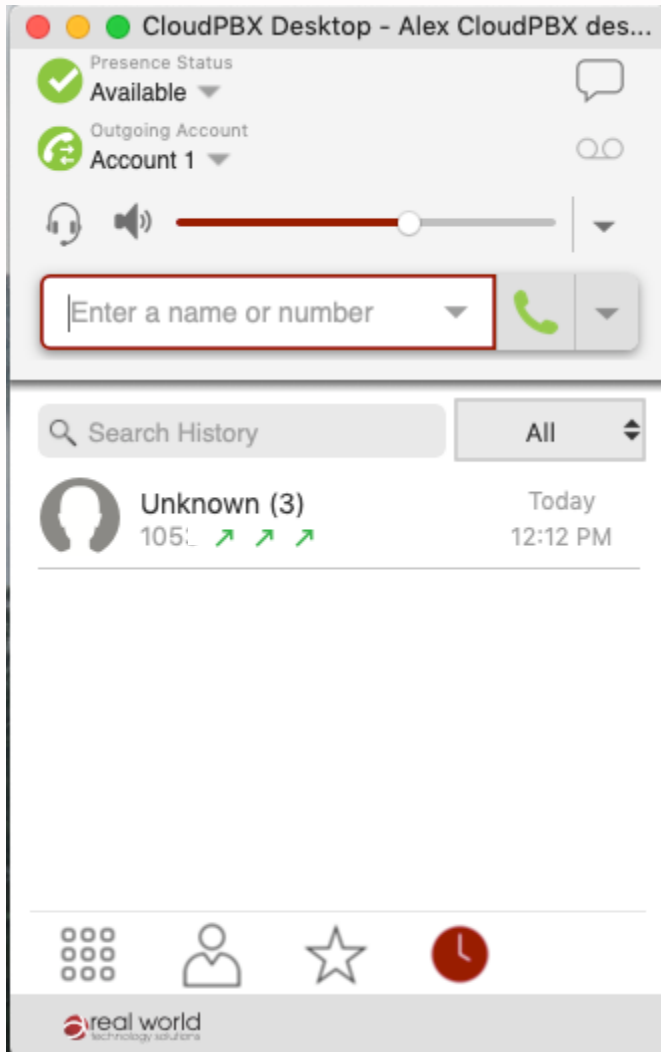
To set to available again, follow the same steps, but select *Available*.



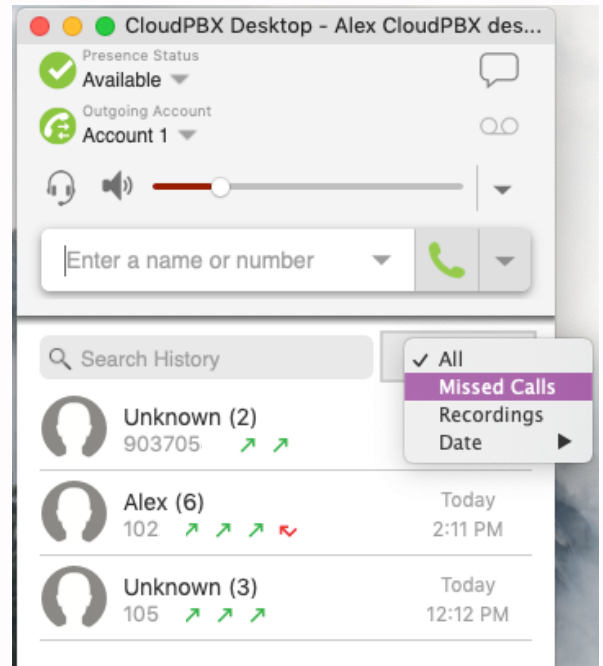
Checking your call history

You can check your call history from the clock icon at the bottom of the app. Green arrows next to the number pointing up indicate outbound calls, while green arrows pointing down indicate inbound answered calls. Red arrows indicate missed inbound calls. You can search for a number via the search box, or filter the results via the dropdown menu next to the search box.

Call History

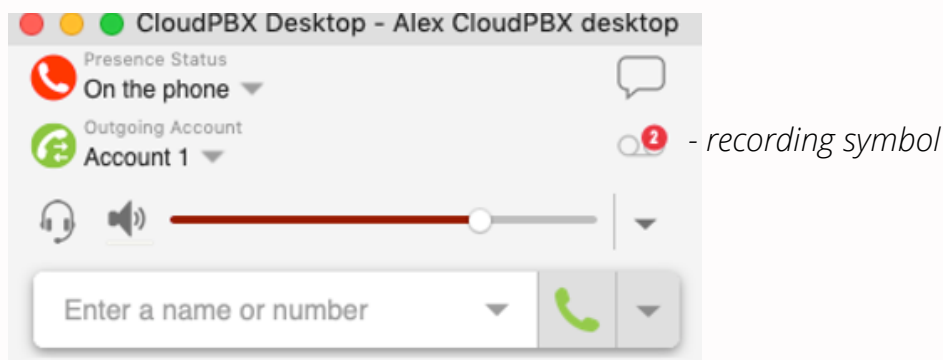


Filter results



Checking messages

If your extension has received a direct voicemail, a red circle with a number in it will appear above the recording symbol:



To check a message, call your extension number. You will be prompted for a password. The password is default set as your extension number. You will then be menu given options to play, replay, delete the message.

About this Guide

As mentioned at the start, this guide is intended as an instruction on basic functions only. It covers the functionality broadly and your system might have slightly different features in place for call flow or voicemail.

If you need any assistance troubleshooting you can email our support team at support@rwts.com.au, or if you are interested in a training session with your team you can contact our sales team at sales@rwts.com.au. You can also give us a call on 1300 798 718