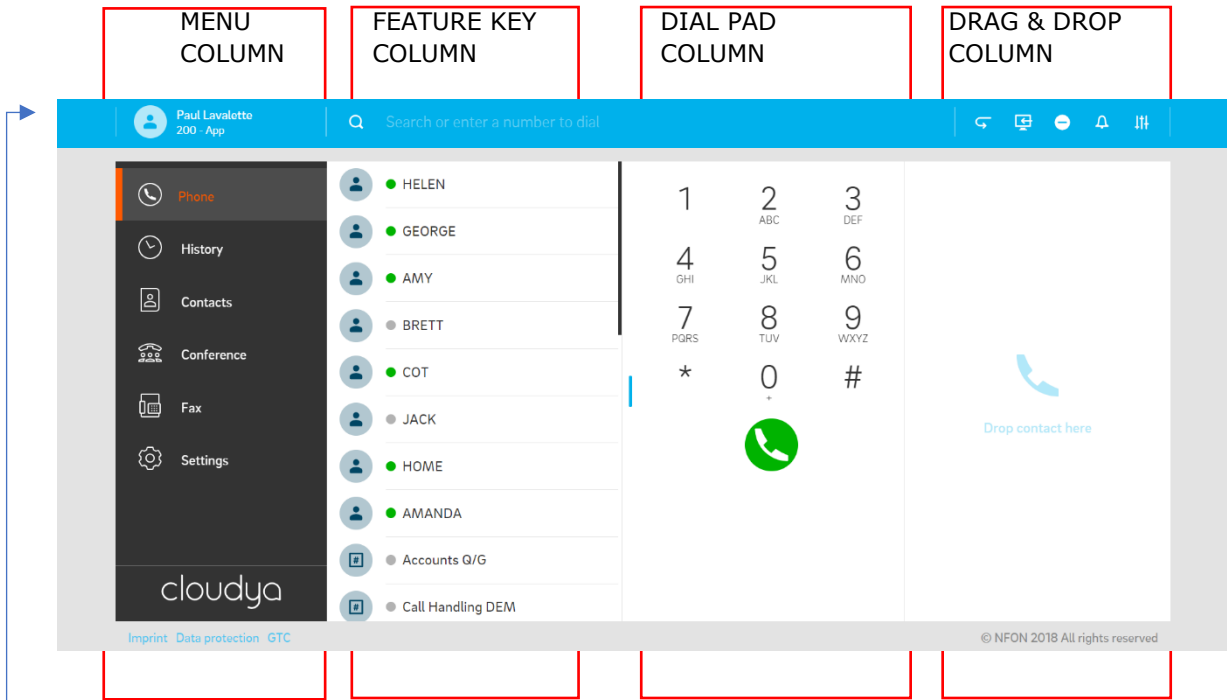


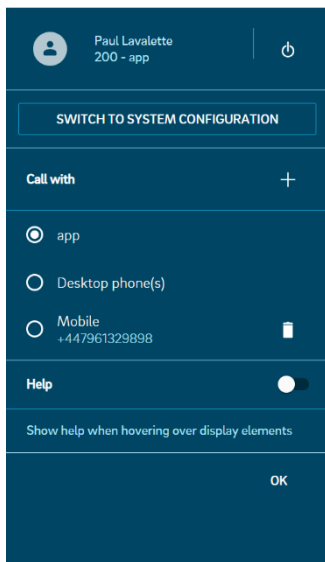
CLOUDYA USER GUIDE (for PC/MAC)

Currently must be opened in Google Chrome, or use the web App...



There are five 'sections' as such, the top blue bar and four columns below. Starting with blue bar:

With a left click on the 'Name, Extension Number and Device' a drop-down appears offering:



Log-In / Log-Out: If bookmarked or using the client, you do not need to log-out when closing your computer - just close the browser, and next time you won't need to enter your log-in credentials.

Switch to System Configuration: System management for Administrator.

Call with:

Add and/or select the device to call from. If not the App, the PBX will telephone the selected device before putting through to the number called. e.g., you can use Cloudya to dial for/from another device

Help: Can turn on / off various help bubbles

OK: To save any edits and return to Cloudya



Search: Enter a telephone number to dial, or extension number or name from call history, contacts, groups, queues, Conferences, or faxes

Call Forward: Change of call forward profiles

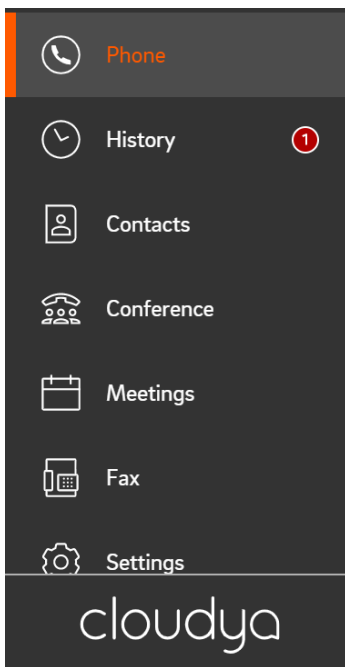
Switch from device using back to App

DND: Put Cloudya on DO NOT DISTURB

Ringtone: Turns on / off ringtone

Audio Settings: Allows selection of input and output audio settings

MENU COLUMN



Phone: The phone section offers pre-programmed feature or function keys for double click or drag and drop dialling, telephone keypad, and drag and drop area.

History: Offers call history for extension. If right clicked, offers redial through device choice or 'add' to contact or feature key entry options.

Contacts: Both private and public alphabetic phonebook, or use search bar

Conference: For subscribed conferences. If not subscribed, then not shown on the menu bar as with Meetings and Fax below.

Meetings: Offers ability to join, create, schedule, and participate in meetings with video and screen share options – even with external parties.

Fax: For subscribed faxes. Shows fax history and allows Cloudya to send faxes. If not subscribed, then not shown on menu bar.

Settings: Offers drop-down options:

User:

Call Forwarding:

Queues:

Function Keys:

Fax:

Info:

Settings/User: Email Address: editable

Password: change Cloudya password

Primary Device: selection (important for Queue members)

Language: edit extension language

Call Waiting: turn call waiting on/off

Intercom: turn intercom on/off

Parallel Ring: turn parallel ring on/off with telephone number entry

Primary Device Ringtone: edit internal, external and group ringtones

Voicemail Settings:

send voicemail by email on/off

Delete voicemails once sent on/off. (If 'delete voicemails once sent' is selected, then no notification is left on handset, and no entry of voicemails visible in Cloudya History or Ncontrol.)

Voicemail Password: change voicemail PIN. Voicemail PIN is needed to retrieve voicemails when Voicemail to Email is not selected and for Hot-Desking.

Settings/Call Forwarding:

Selection and creation of Call Forward profiles.



This is the Cloudya 'Header' when I have no profiles



And this is the Cloudya 'Header' when I **do** have a profile to choose from

Creating a Call Forward profile will be dealt with in a later section.

Settings/Queues:

Shows subscribed Queues with a delete option

Settings/Function Keys:

Creation, editing and deletion of function keys as displayed in 'Phone Menu'.

Settings/Fax:

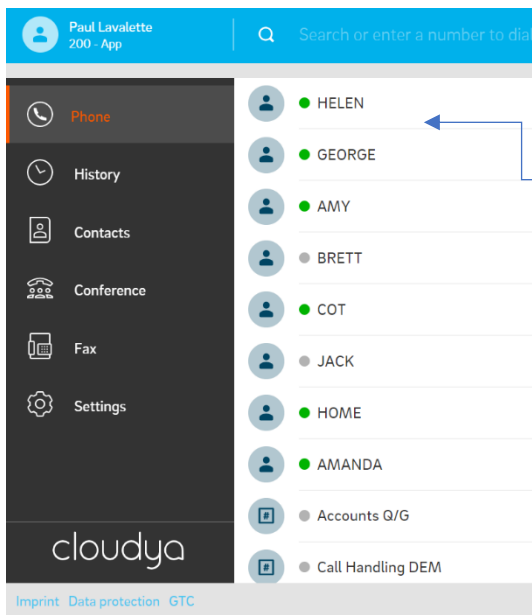
Subscription to Faxes and use/ creation of cover sheets.

Settings/Info:

Link to Data Protection and General Terms and Conditions

PHONE:

FUNCTION KEY COLUMN



These are programmable feature/function keys that can be dialled by 'double clicking' or dragging and dropping into the drop zone – to the right of the keypad.

They are added, deleted and/or edited in the Function Key menu in **SETTINGS** menu, and can be Extensions (with Busy Lamp Field BLF), Speed Dials, Function Codes or Service Codes.

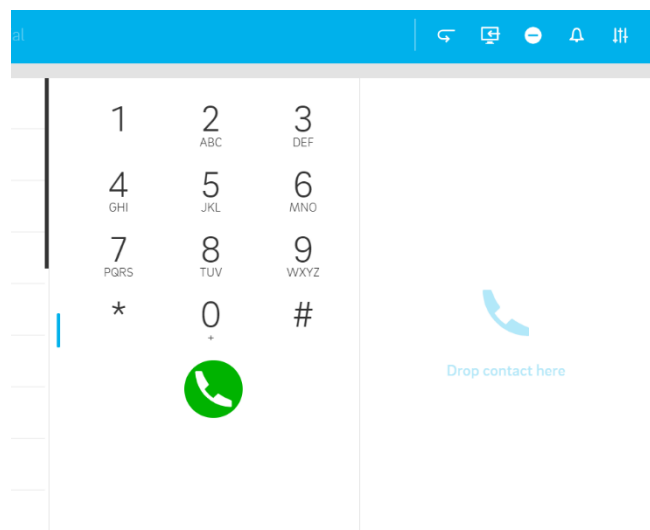
Function Key Column is only displayed in '**PHONE**' mode

DIAL PAD COLUMN

DRAG & DROP COLUMN

The Dial Pad section enables you to dial a telephone number, extension number, a function or service number from this dial pad by using the cursor. Alternatively, you can use the numbers keys on the computer and initiate the call with enter/return.

When dragging & dropping from the function key section (or by double clicking from call history or contact section and left clicking the green call in progress bar at top) the Drag & Drop section is populated with the call – and offers call handling options – hold, blind transfer, attended transfer, call toggling, third party conference and call termination.



hold, blind transfer, attended transfer, call toggling, third party conference and call termination.

TO MAKE A CALL:

(See diagram below)

Use the keypad to dial a number and press the green 'call' button, or
In the 'search bar' use the numeric keys on your PC/MAC and press the return key to call

In this example, I have placed my cursor on function key GEORGE and left click dragged him to the DROP ZONE - or just double click on GEORGE.

A GREEN bar appears with my call status.

In the Function Key column, you can see George's status has gone RED (busy)

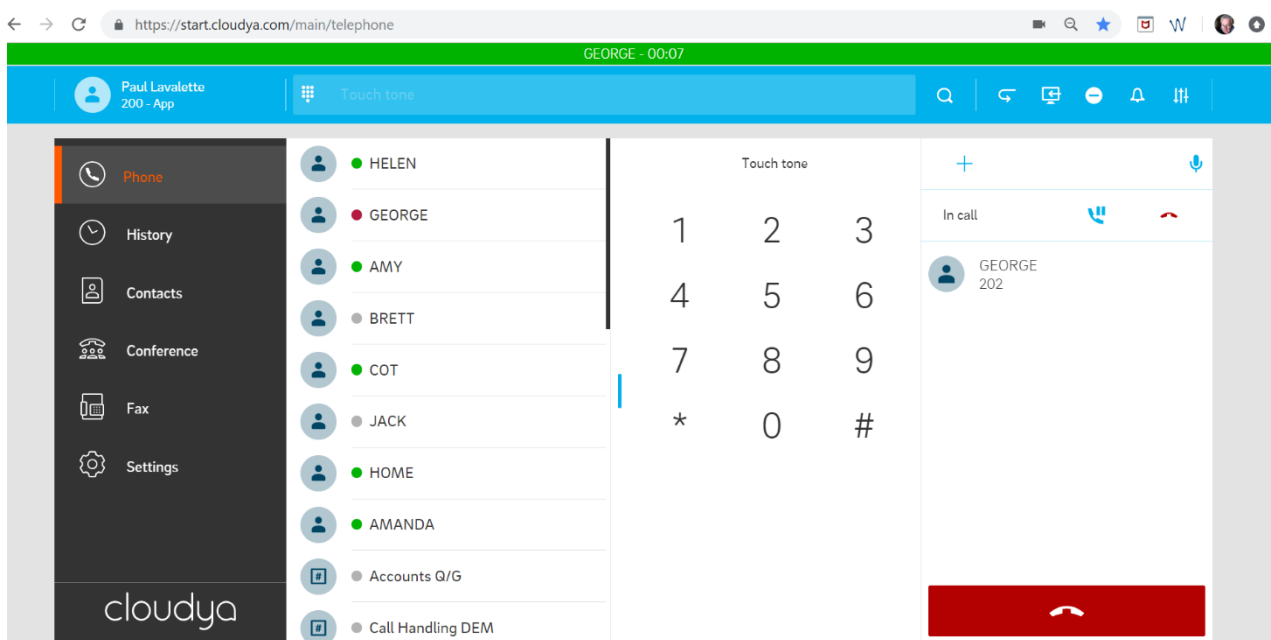
Within the DROP ZONE you see:

Touch tone keypad (if needed), + to add participant and a MUTE icon (to mute caller).

In Call with PAUSE icon (places call on hold with music) and END CALL icon (terminates call)

GEORGE (extension name) and 202 (extension number)

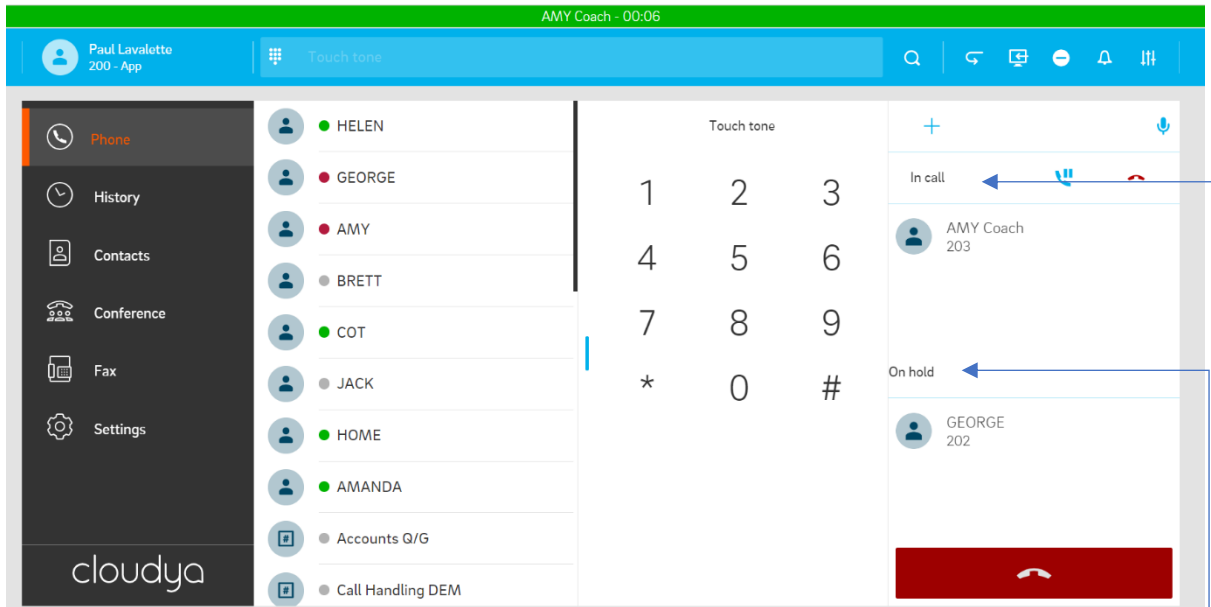
Another END CALL bar below.



ATTENDED TRANSFER (ANNOUNCED)

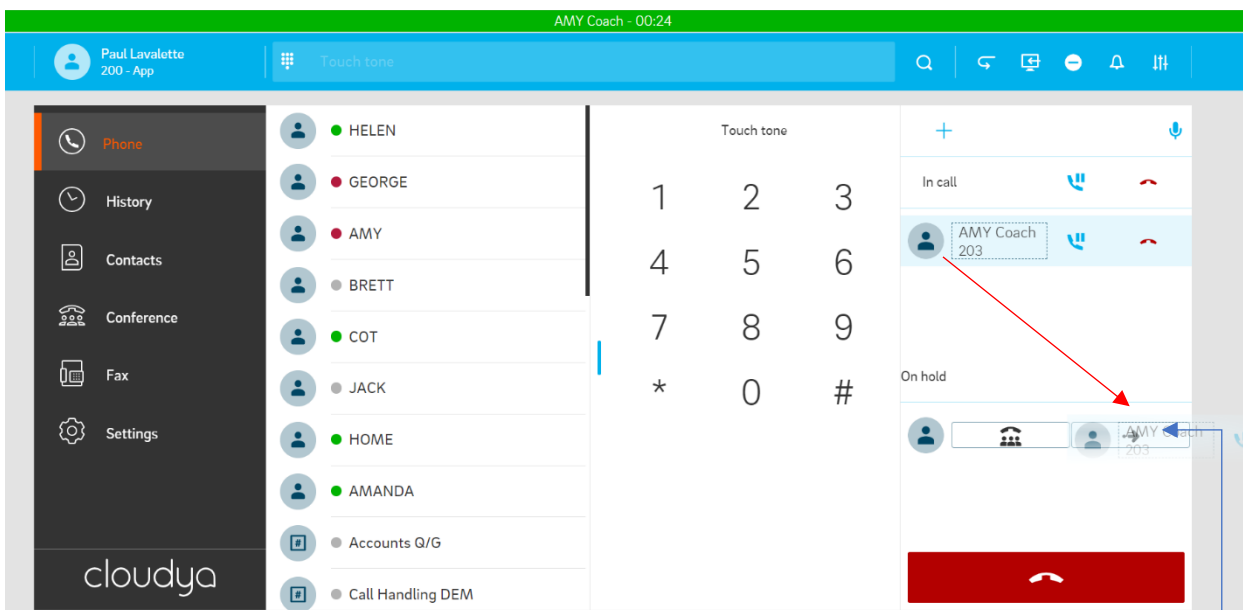
Following on from the example above, I will make an attended/announced transfer to AMY. Either:
Select the + (which allows to dial a number) or use the search facility, or
Place GEORGE on hold and drag & drop AMY into GREEN drop zone **or just**
Drag & drop AMY into GREEN drop zone (which places GEORGE on hold)

You are now in conversation with AMY



and GEORGE is on hold.

You announce to AMY that GEORGE is calling for her (and with her approval) you transfer the call by 'left clicking' on AMY and dragging down...

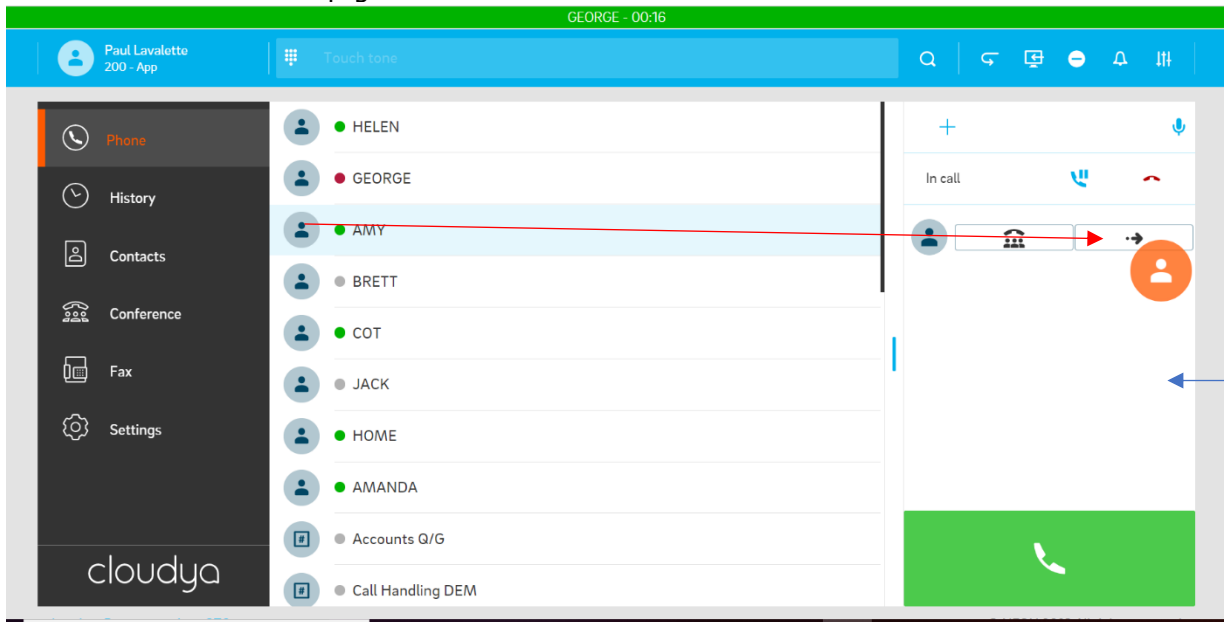


to the transfer icon as shown

Once dropped, both participants in the drop zone disappear – as transferred. Notice that both extensions are RED (busy) in the Function Column.

UNATTENDED/BLIND TRANSFER

You can see from the top green bar that I am in conversation with GEORGE. Now I left click

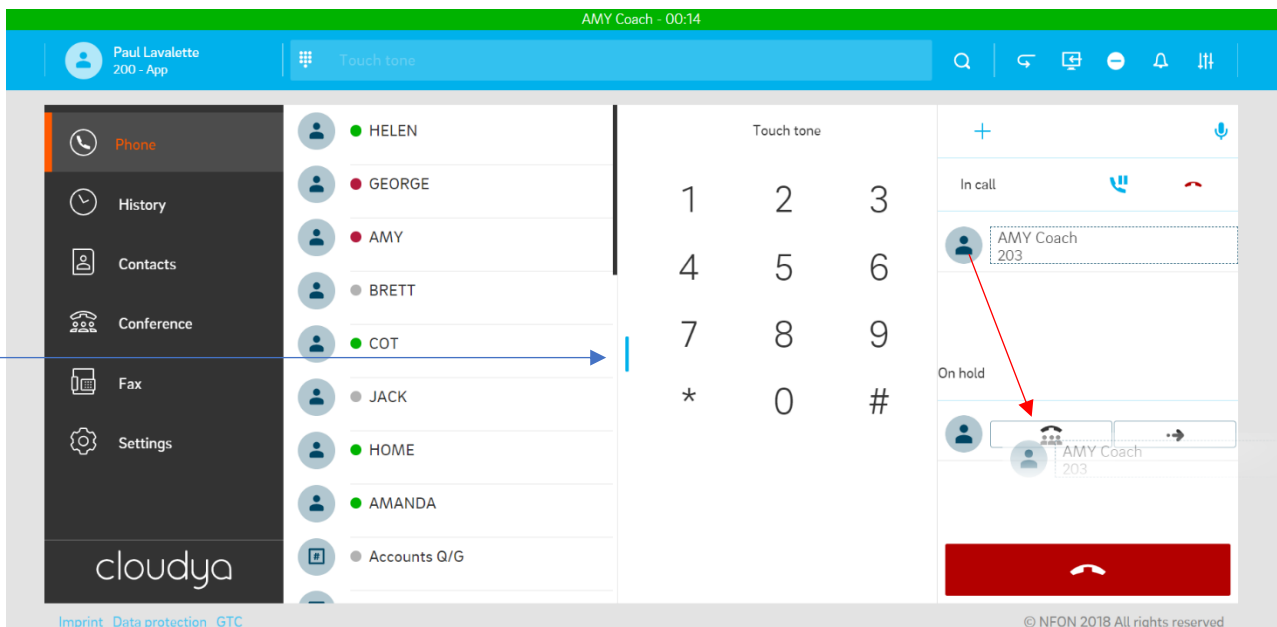


and drag AMY from the Function Column directly into the 'transfer icon' of GEORGE. When dropped, the call is transferred.

Please note the GREEN section below. If I had dropped AMY there, I would have been in conversation with her.

3-WAY CONFERENCE

After placing 1st Party on hold, I now establish a call with 2nd Party.



When ready for a 3-way conversation, I drag the 1st Party into the '3-way conference' icon to establish the 3-way conference.

By clicking on/off the blue 'divider' you can double the field of pre-programmed buttons and see if who you want is on the phone. You can scroll down and at the end of the pre-programmed function keys, there is an option to 'edit' (takes you to settings/function keys).

MOVING BETWEEN DEVICES

You can take a call on one device (either Cloudya softphone, Cloudya mobile App or desk phone) and by entering *8 on another device, pick up the call on that device.

HISTORY

Calls:

This section shows a chronological list of all calls made, calls received and missed calls with time, the date and duration of the call – across all devices. Double click to return the call or call again. Right click to add to **Contacts** (phonebook) or **Function Keys** (favourites).

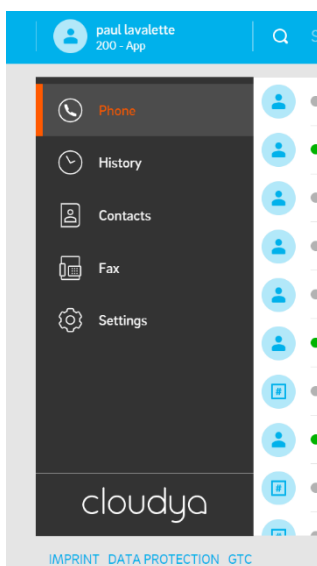
Voicemails:

This section lists details of voicemails received with playback, forward and delete options. The extension user can choose to get voicemails on a device, and email to voicemail option or both where the voicemail appears on the device and gets emailed.

CONTACTS:

This section lists all 'Company' Phonebook entries as well as 'Private' entries alphabetically. You can scroll or use the search, filter, and add/ edit private entries in the phonebook. To call, just double click on the entry.

CONFERENCE:

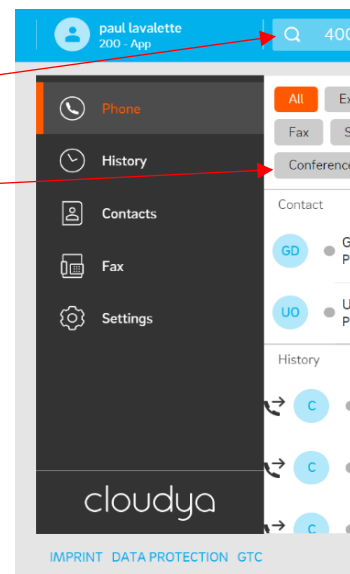


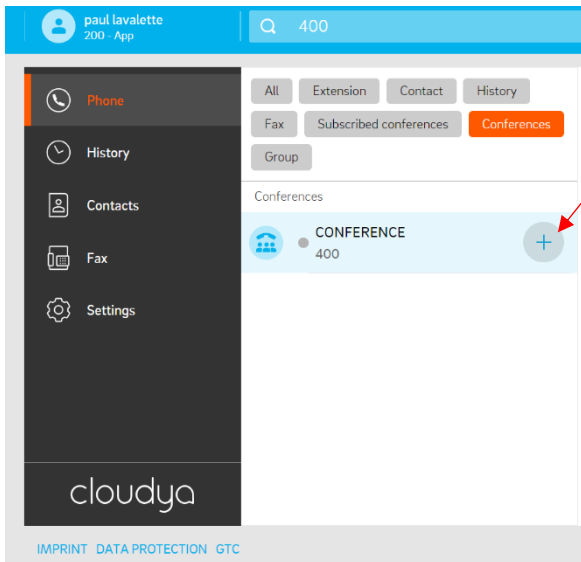
If you have not already subscribed to a conference, your Cloudya Softphone will look like this.

Your system administrator should provide you with the conference details. Click on the search icon (spy glass) and enter the conference pilot/extension number.

Add conference internal number

Click on





Click on + and enter conference PIN to Subscribe. There is a choice of 'Admin' and 'User' PIN.

You now have the added **CONFERENCE** menu

(You will also have a CONFERENCE tab on the Cloudya mobile App)

USER PIN:

4 digit PIN to gain access to the conference

ADMIN PIN:

4 digit PIN to gain access AND:

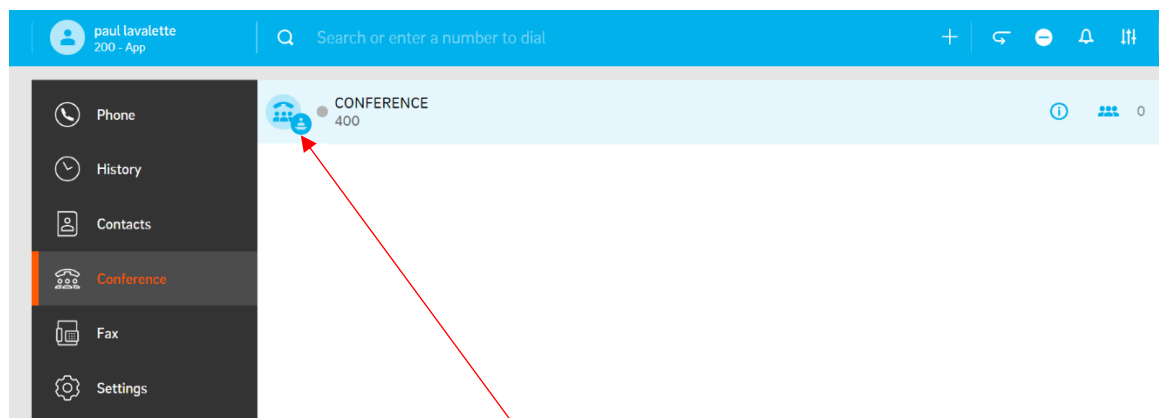
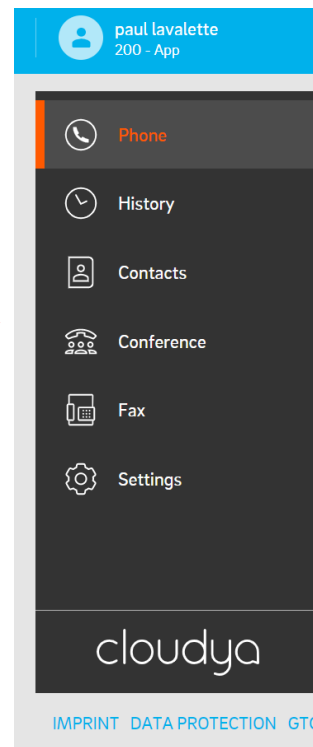
Mute/ Unmute participants individually or collectively

Exclude a participant from the Conference

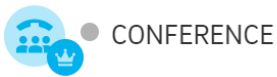
Invite participants

Make the conference public or private (lock)

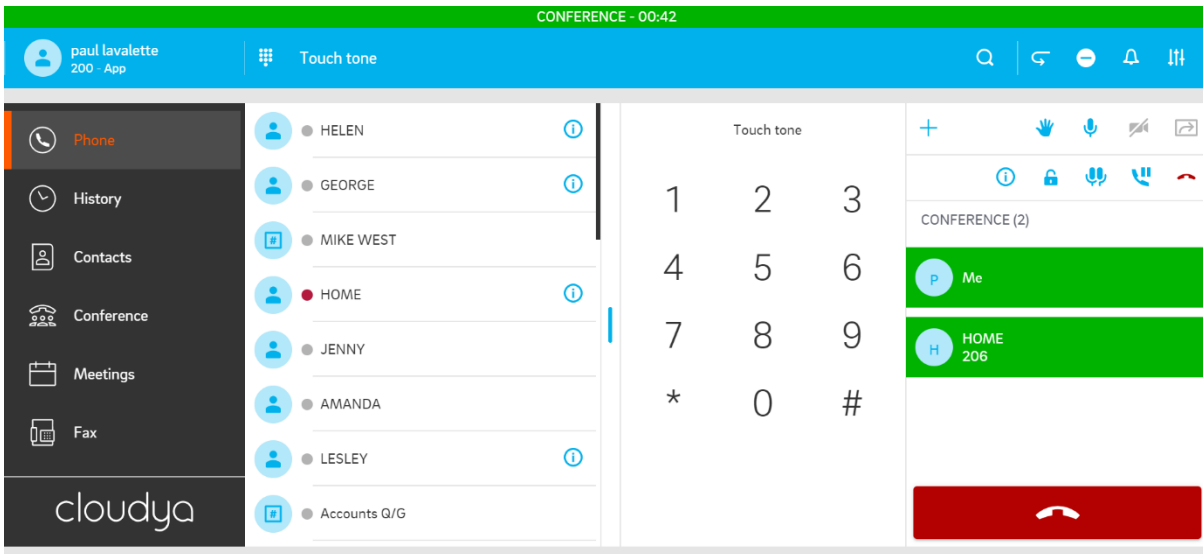
End the Conference



Select the CONFERENCE menu to see which conference(s) you have subscribed to. To join the conference, double click on this icon



The 'Crown' icon symbolises Admin or Conference Presenter. For up to 50 internal/ external participants



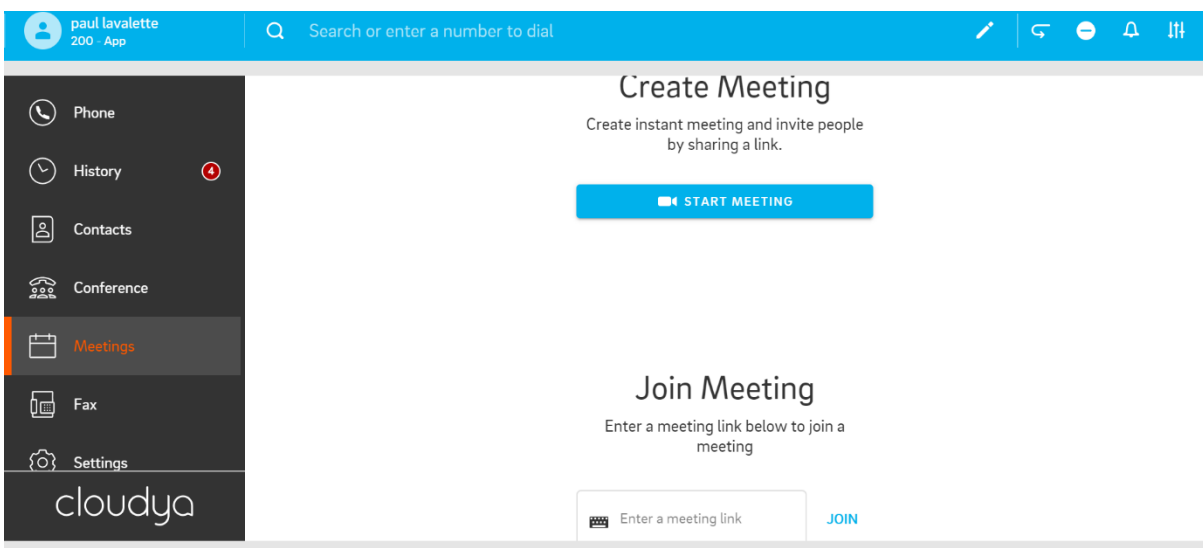
+ To add participants. If external, please use +44 format. For internal, drag & drop.

MEETINGS:

'MEETINGS' comes in two formats:

The included standard is to be able to **Create** a meeting by starting and adding up to 8 participants (Internal or External) and/or to **Join** a meeting by entering a meetings link.

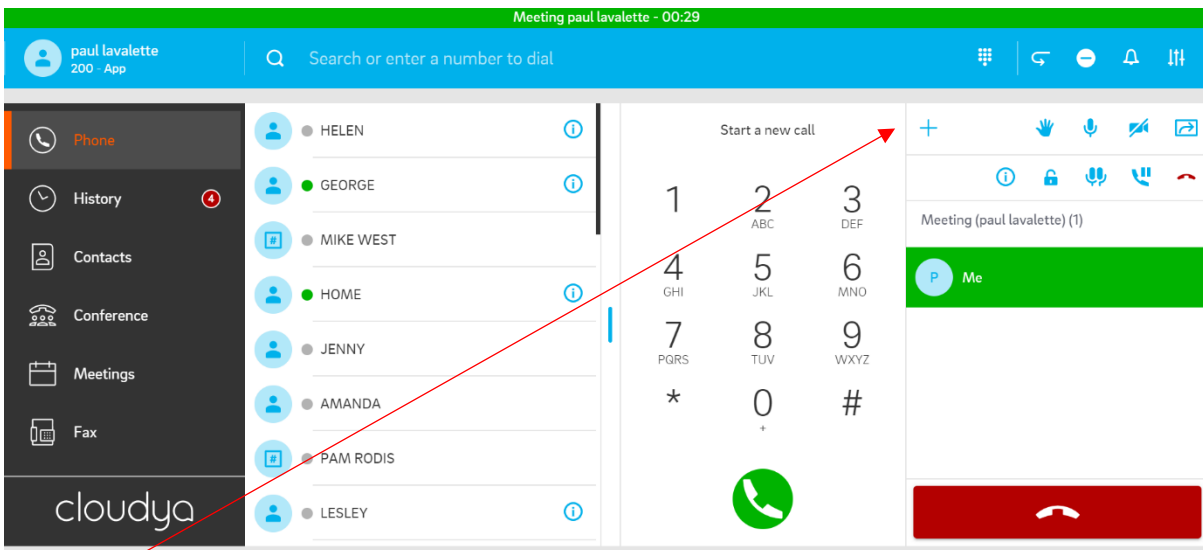
For an additional subscription, you can also **Schedule** meetings for up to 25 participants



Start Meeting: This will start a Meeting and create a meeting URL that can be sent out and accessed by internal parties or external parties through a web browser.

Internal Meeting participants can be added by drag and drop. Offers video and screenshare options.

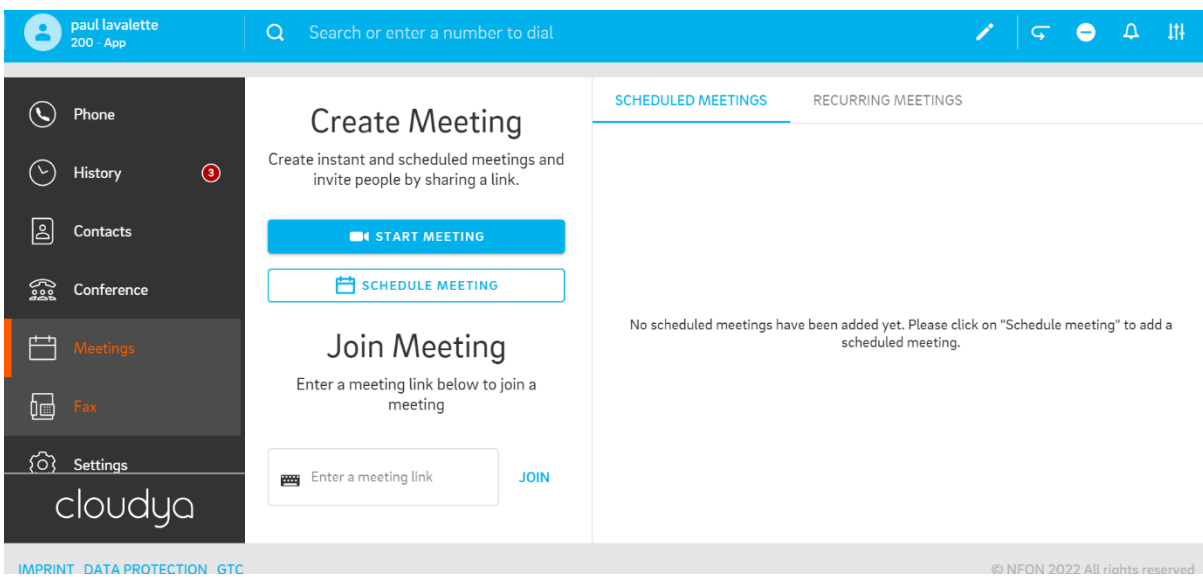
Join Meeting: For received meeting invite/ URL, enter the link to join.



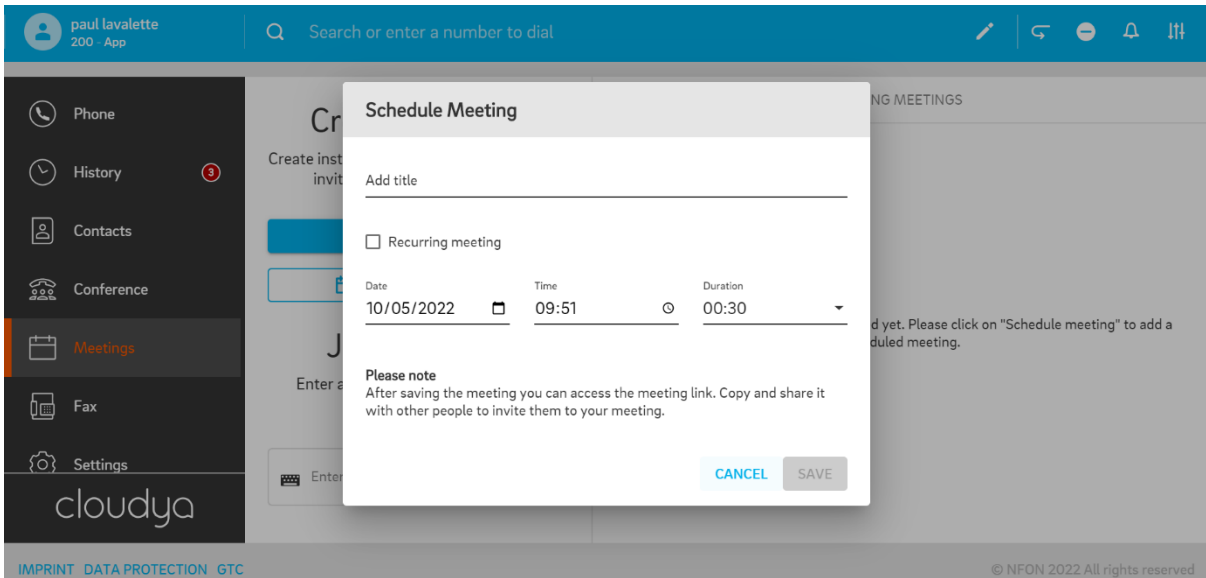
Options:

+ to 'add' participants; put a hand up; mute; video; screenshare.

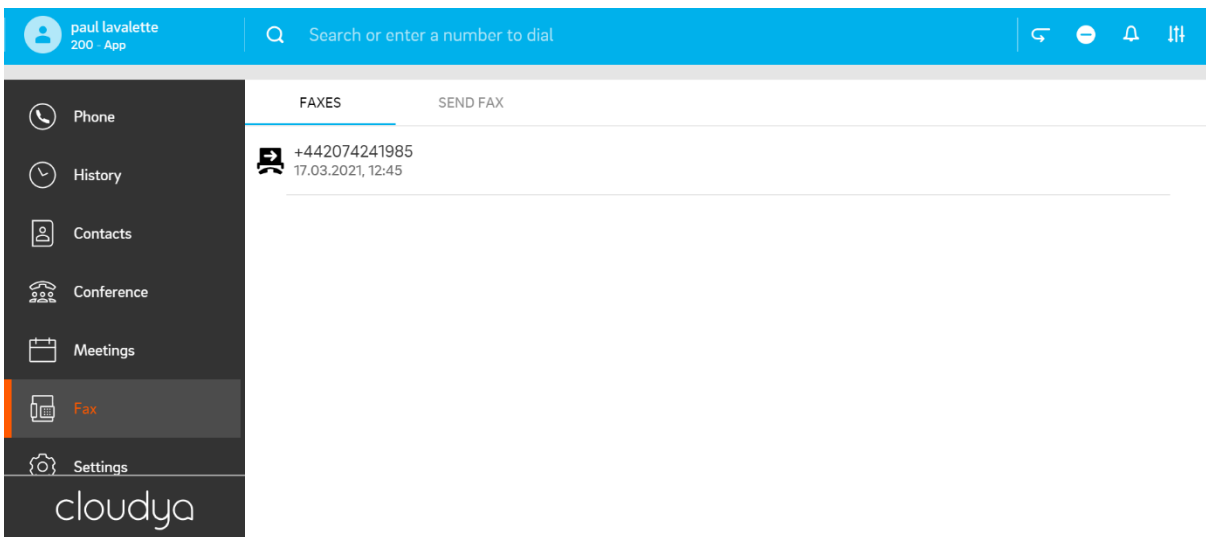
As Meeting Organiser, there is an info button (who is in); a lock button; a microphone, pause or hold button and an end/ terminate button.



This screen shows the 'MEETINGS +' screen where up to 25 participants can have an audio or video meeting with screenshare. There is a 'Schedule' option for both Ad-Hoc meetings or re-occurring meetings where a Meeting URL is produced. This can be distributed through MS Outlook.



FAX:



FAXES:

Shows faxes received

SEND FAX:

Ability to send a fax (must be in PDF format) and use a fax cover sheet.

SETTINGS:

SETTINGS USER:

Email Address: editable

Password: change Cloudya password

Primary Device: selection (important for Queue members)

Language: edit extension language

Call Waiting: turn call waiting on/off

Intercom: turn intercom on/off

Parallel Ring: turn parallel ring on/off with telephone number entry
Primary Device Ringtone: edit internal, external and group ringtones
Voicemail Settings:

send voicemail by email on/off

Delete voicemails once sent on/off.

(If 'delete voicemails once sent' is selected, then no notification is left on handset, and no entry of voicemails visible in Cloudya History or Ncontrol.)

Voicemail Password: change voicemail PIN. Voicemail PIN is needed to retrieve voicemails when Voicemail to Email is not selected and for Hot-Desking.

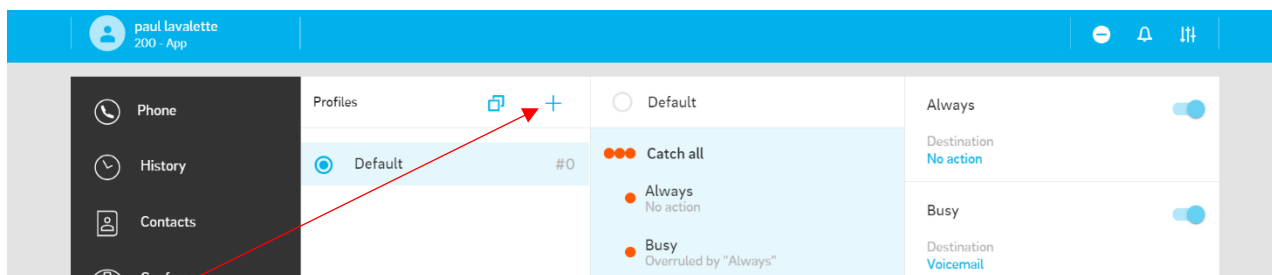
SETTINGS CALL FORWARDING:

A standard **default** call forward profile is set for each extension, and when 'manually' cancelling a call forward profile, is the one the system returns to. The default call forward profile is determined by **Source** (source of the call), default, busy, not available, timeout and not registered.

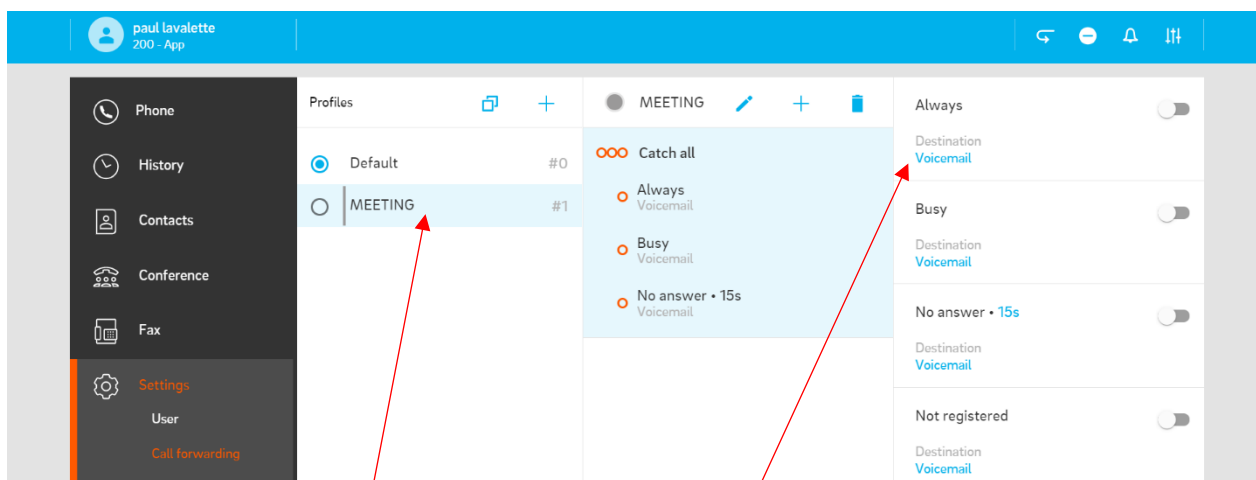
EXAMPLE:


You can 'create' rules for different scenarios, such as MEETING whereby you can determine what happens to your calls. This applies to internal or external (DDI) calls.

I'm going to create a profile that can easily/ quickly be selected when I go into a meeting that will send all calls to my voicemail. However, I want a particular number to get through and interrupt my meeting (*for example my secretary who determines it is worth the interruption or an urgent call I'm waiting for*).



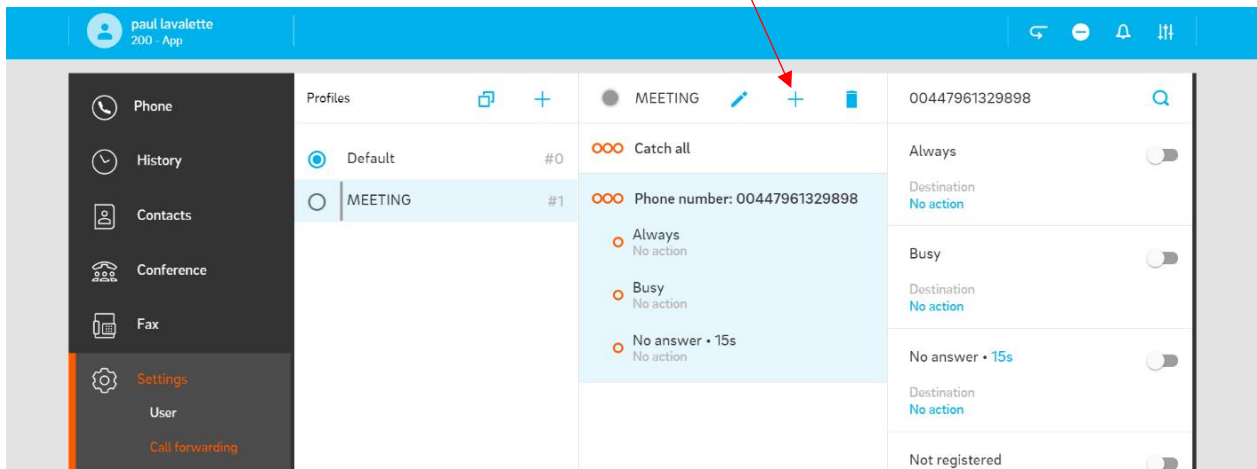
Click  to ADD a profile and name / SAVE it.




Left click on the profile name , and you can see that 'Always' (top right) has voicemail selected – which

is what I want although if you left click the blue voicemail you see there is a dropdown offering Busy or Phone Number.

Now I want to 'allow' someone to call through by selecting [which opens a screen to enter either 'all internal' or you can select an extension \(name or number\) or enter an external number in the +44 format.](#)



You can see that I have entered a mobile number (either +44 or 0044 format) and in the righthand section 'Always' is set to 'No Action' – which means it will ring through.

This profile can be selected very quickly from the Cloudya softphone – either from the Settings/Call Forwarding, or from the  icon to the right of the blue search bar

Please remember to return to 'Default' Profile.

SETTINGS QUEUES:

Offers the ability to opt in or opt out of queues

SETTINGS FUNCTION KEYS:

Offers the ability to add, edit or delete 'favourites' in the **Feature Key Column**

SETTINGS FAX:

Allows this Cloudya extension user to subscribe to faxes and to create Cover Sheets.

SETTINGS DOWNLOADS:

Has various 'downloads' including [Cloudya for Windows – CRM Connect](#)

This is a win.zip file that enables CRM integration and contains the necessary integration instructions.