



# Cloud Softphone User Guide

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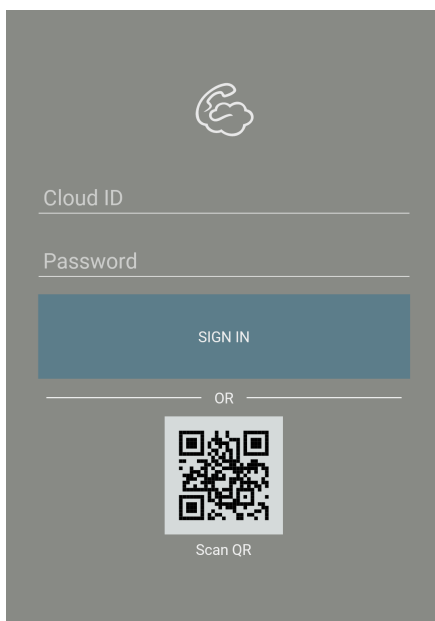
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## Setup Guide

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Cloud Softphone is free to install from for Android and Apple iOS devices. This guide will walk you through towards installing and configuring your smartphone for CloudVoice<sup>™</sup>.

1. Go to <https://getafix.ipfinity.com/cloudinstall/> to get redirected to the Apple App Store or Google Play Store. Alternatively, you may search for “Cloud Softphone” on your phone’s smartphone.
2. Once installed, you may open the app to sign in and configure the app. You may log in by scanning the QR code sent to you, or, with your Cloud ID and password.



### QR Code Sign In (RECOMMENDED)

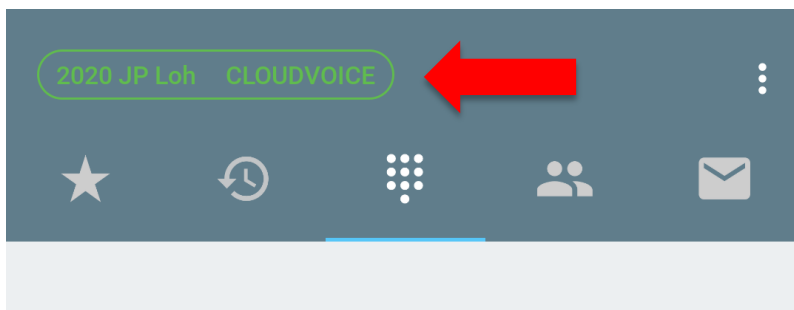
- Display the QR code on your computer screen or another device. Alternatively, you may print the QR code.
- Tap the “Scan QR” button at the bottom of the screen to activate the phone camera. Allow access to the camera when prompted.
- Point the camera to the QR code. The code will automatically be scanned.
- Once scanned, camera will be deactivated and the app will configure itself.

## Manual Sign In

- Enter the Cloud ID and password into their respective form fields. The Cloud ID must include “@IPFINITY”.
- Tap on “Sign In” to continue.
- Once authenticated, the app will configure itself.

**IMPORTANT:** Do NOT forward your QR code or share your credentials. The code and credentials can only be activated once. To reactivate, please contact your system administrator or IPFINITY Tech Support.

3. Allow the app to access the microphone and run in the background when prompted.
4. Your app is ready to make and receive calls when the circle with your extension number and name is **GREEN** and not flashing. See example below.



5. To test you the app, call (416) 900-1416 then press 336 to record a message and have the message played back to you.

## Basic Usage

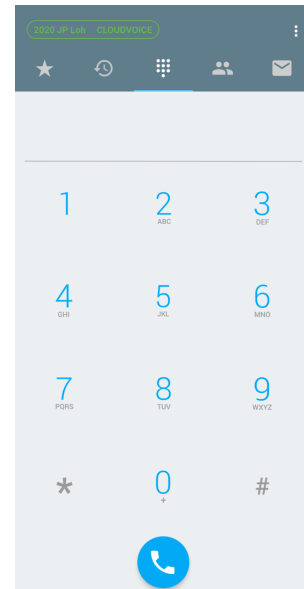
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The app dial pad is used similarly to your phone's dial pad.

Use Cloud Softphone to dial out with the CloudVoice account.

You may also call other extensions in the account with the app.

When calling external phone numbers, your account's Caller\*ID name and number will be used.

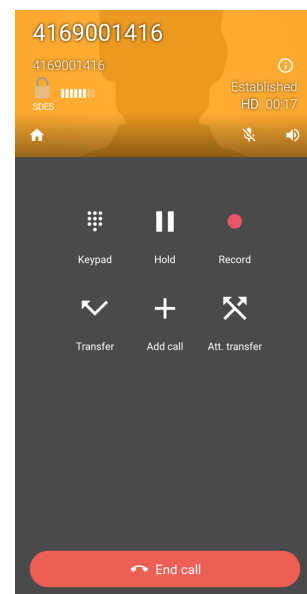


While in a call, you may place a call on hold, transfer or create a conference with another call.

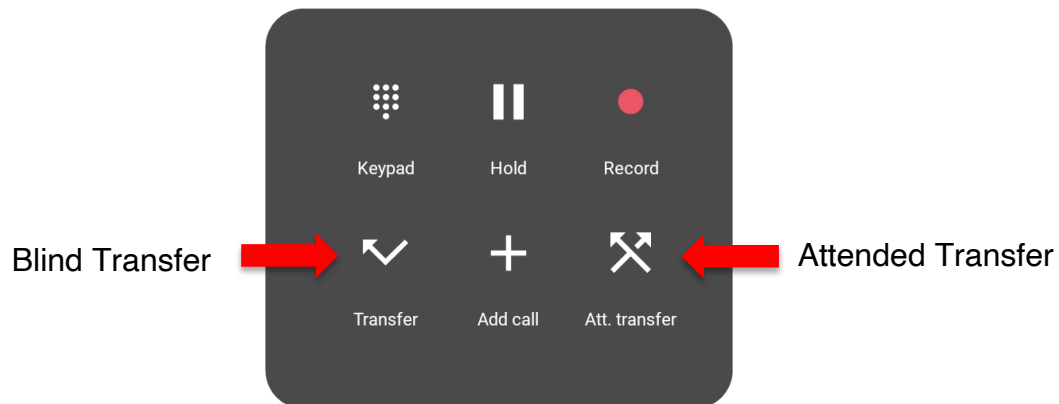
The upper section of the screen shows Caller\*ID of the remote party, call duration, microphone meter, and, the stats of the call.

In the middle section are buttons, in clock-wise direction from the upper left, keypad access, put call on hold, start call recording, call transfer, add or merge a call (conferencing, and attended transfer.

Transfer may also refer to a cold transfer, while attended transfer may also refer to a warm transfer.



# Cloud Softphone Call Transfer



## How to Make a Blind Transfer (Cold Transfer)

- This transfer button will put the caller in hold,
- You will be directed to the Keypad/Contact List to input the number of the person who will receive the transferred call.
- Once you dial or select the contact, your call session will end and the transferred call will appear to the receiver as an incoming call from you.

## How to Make an Attended Transfer

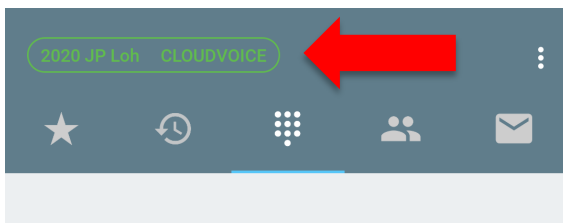
- This transfer option will redirect you to the same screen as the blind transfer while putting the caller on hold.
- When the call receiver is selected or dialed, you will first be connected to the receiving party.
- Once the receiving party is ready to receive the call, tap on the transfer button found on the bottom of the screen. To cancel, tap on cancel then end the call to return to the first call.

# Do Not Disturb (DND) Mode

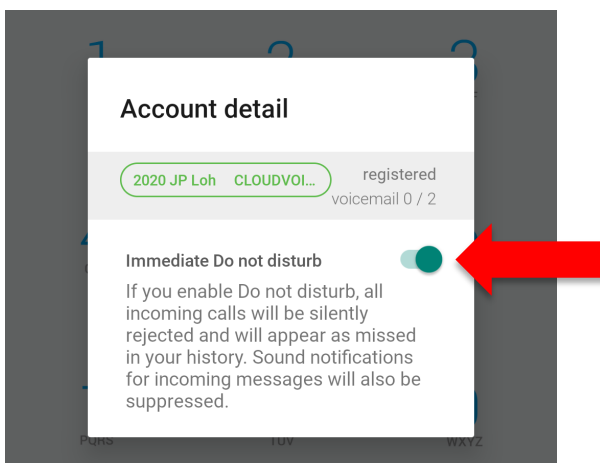
Do Not Disturb Mode or DND Mode will reject all incoming calls when enabled. Rejected calls while DND mode is enabled will appear as missed calls in your call history.

## How to Enable/Disable DND Mode

1. Tap on your extension/name at the top to open the account detail dialog.

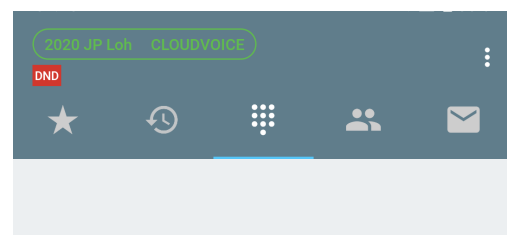


2. Tap or slide the switch to toggle the option for Immediate Do Not Disturb (enable to reject calls).



3. Tap back or anywhere outside the dialog to return to the main app window.

A **RED** DND indicator underneath your status indicator will be visible when DND mode is enabled.



# CloudVOICE VoiceMail User Guide

## **Accessing Your Mailbox**

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1. Dial 00 or press the envelope button.
2. Alternatively, you may call your company's main number then dial 0-0-0 with the auto-attendant.
3. Enter your mailbox number and password when prompted.
4. Follow the voice prompts.

### **More Information:**

- You may also access your mailbox from another phone by dialling 0-0-0
- The default password to your mailbox is the same as your mailbox number
- Your mailbox has a limit of 100 messages
- For password resets, please contact your system administrator or contact IPFINITY support

## **Listening to Messages**

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2. Access your mailbox with the instructions in the previous section
3. If you have new messages, the system will dictate the number of new messages
4. Press 1 to listen to messages in your inbox
  - Press 5 to repeat the current message
  - Press 6 to play the next message
  - Press 7 to delete the current message
  - Press 8 to forward the message to another mailbox

## **Mailbox Personalization**

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1. Access your mailbox then press 0 to go to mailbox options
2. Press 3 to record your name
3. When done recording, press the pound key (DO NOT HANG UP)
4. Follow the voice prompts

Your recorded name will be played instead of spelling out your name when callers search the company directory.

## **Changing Your Password**

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1. Access your mailbox then press 0 to go to mailbox options
2. Press 5 to set a new password then follow the voice prompts

## **Voicemail to E-mail**

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If your system administrator nominated your email address, you will receive a copy of your voicemail in your e-mail inbox. The message will be attached as a WAV file.

To ensure delivery, add [voicehost@ipfinity.com](mailto:voicehost@ipfinity.com) to your address book.

Please note that deleting messages in your e-mail inbox will not delete your voicemail message in the CloudVOICE system. To skip storing voicemail messages in the CloudVOICE system, please contact your system administrator or IPFINITY technical support.

## **Voicemail to E-mail**

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If your system administrator nominated your email address, you will receive a copy of your voicemail in your e-mail inbox. The message will be attached as a WAV file.

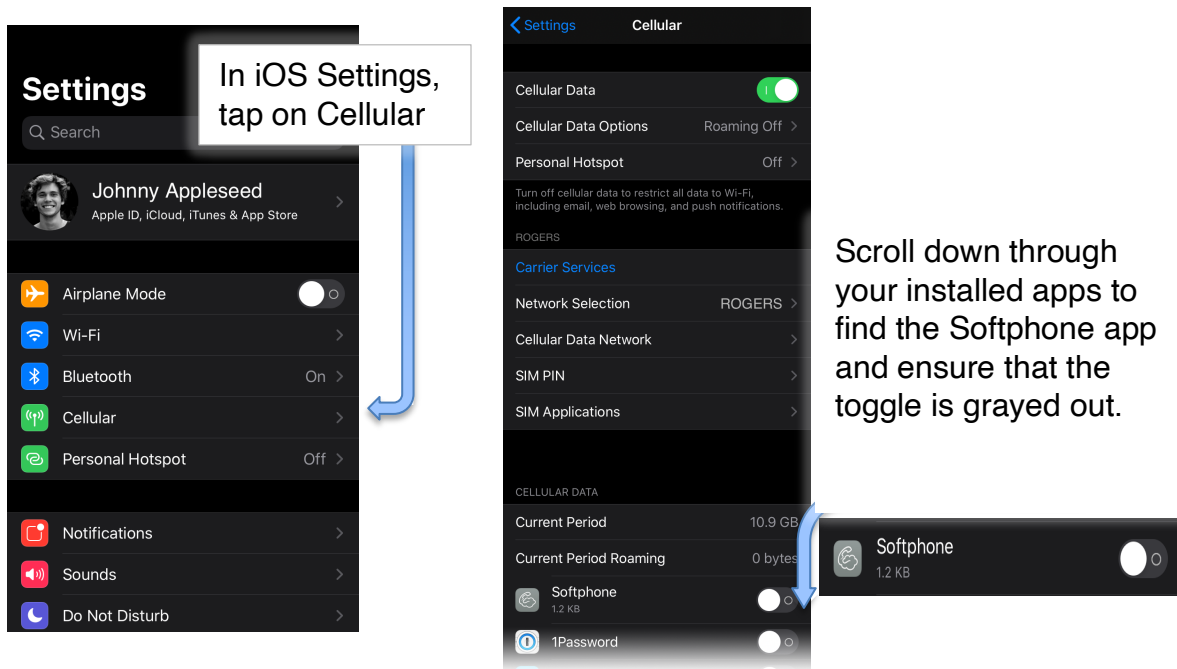
To ensure delivery, add [voicehost@ipfinity.com](mailto:voicehost@ipfinity.com) to your address book.

Please note that deleting messages in your e-mail inbox will not delete your voicemail message in the CloudVOICE system. To skip storing voicemail messages in the CloudVOICE system, please contact your system administrator or IPFINITY technical support.

# Cloud Softphone Mobile Data Settings

To avoid mobile data charges with the Cloud Softphone app, you may disable cellular data usage. When disabled, you will not be able to receive calls until your phone has connected to a wifi network.

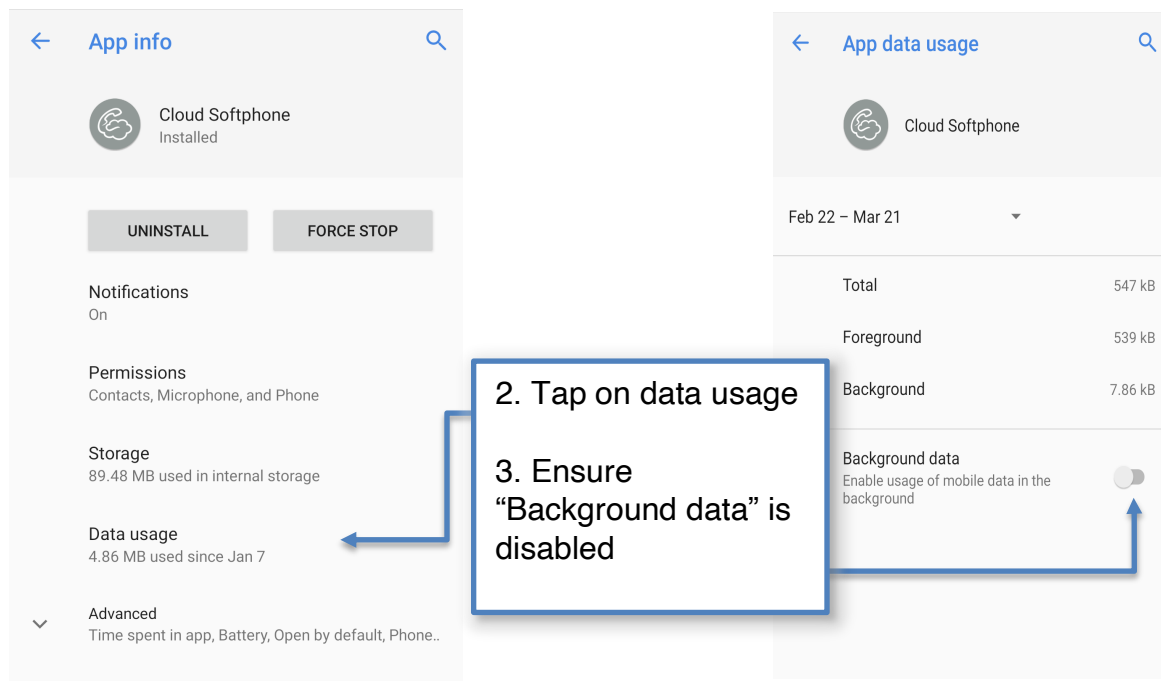
## On Apple iOS Devices



## On Android Devices

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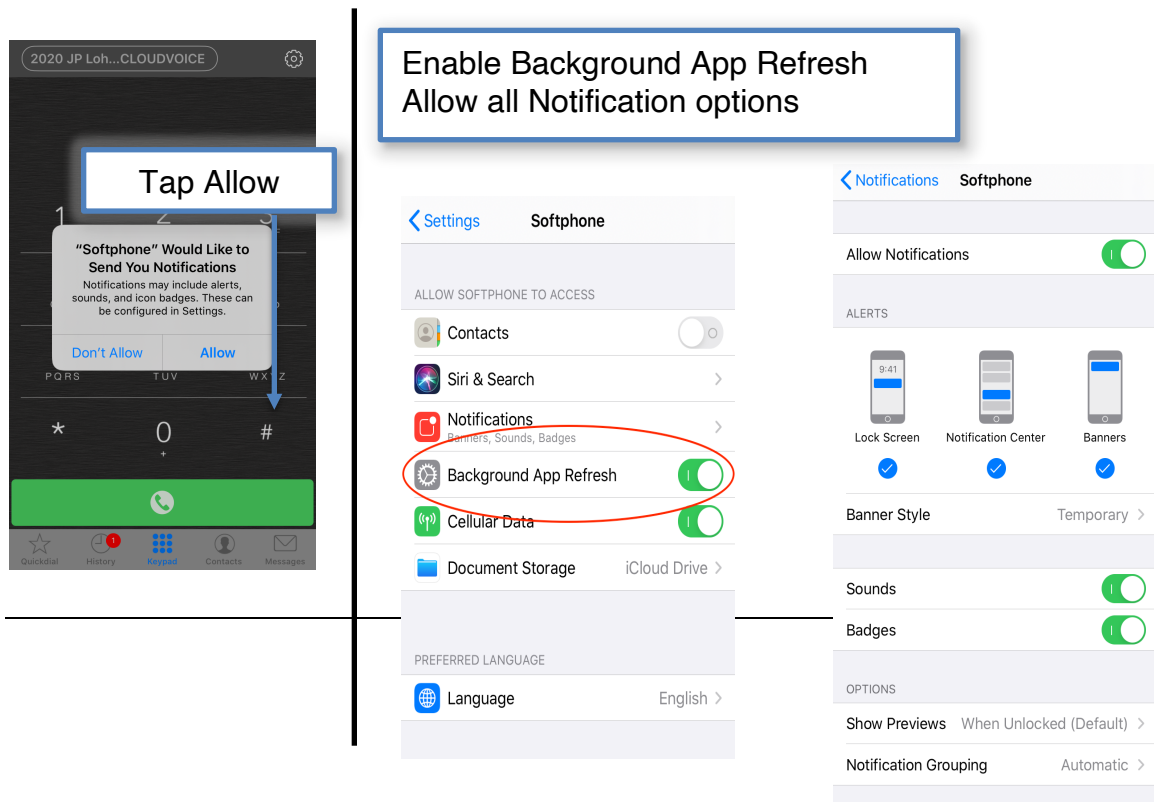
1. In Settings, look for Cloud Softphone similar to the screenshot below



# Cloud Softphone Background App Settings

To ensure calls are received while the app is not in the foreground, enable background app refresh and/or push notifications for the app.

## On Apple iOS Devices



## On Android Devices

In Settings, look for Cloud Softphone similar to the screenshot below

1. Enable Push notifications or all notifications
2. Allow the app to use the battery in background
3. If your device has a power saving application, create an exception for Cloud Softphone

