

# Cymbus App User Guide

For Business Cloud Communications | October 2024

# Table Of Contents

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- Getting Started** ..... 1
  - System Requirements ..... 1
  - Sign In ..... 2
    - Can't Sign In? ..... 3
  - Exit ..... 3
- Using the Cymbus app** ..... 4
  - Navigation Tabs ..... 4
  - Connect your Headsets ..... 6
- Calls** ..... 7
  - Place a Call ..... 7
    - Using the Dialpad ..... 7
    - Using Call History ..... 7
    - Using Messages ..... 7
    - Using Contacts ..... 7
  - Answer a Call ..... 8
  - During an Active Call ..... 8
  - Navigate Away from the Call Screen ..... 9
- Call Transfer & Merge** ..... 10
  - Attended Transfer ..... 10
  - Blind Transfer ..... 10
  - Merge Calls ..... 11
- Call Blocking** ..... 12
  - Block a phone number ..... 12
  - Unblock a phone number ..... 12
- Voicemail** ..... 14
  - Mark Voicemail as Read or Unread ..... 15
  - Change Greetings ..... 15
- Emergency Calls (911)** ..... 16
  - Desktop (Windows and Mac) ..... 16

Mobile (iOS and Android) .....	16
<b>Contacts &amp; Presence .....</b>	<b>18</b>
Search for a Contact .....	18
Presence .....	19
Personal Contacts .....	19
Device Contacts (On Mobile Phones) .....	19
Favorites .....	20
<b>Messaging .....</b>	<b>21</b>
Search .....	21
Messages .....	21
Mentions .....	22
Reactions .....	23
Add a Reaction .....	23
Remove a Reaction .....	23
Emoji Skin Tone .....	24
<b>Messaging Via Channels .....</b>	<b>25</b>
Channels .....	25
Join a Channel .....	25
Set Channel Notifications .....	25
Add People to a Channel .....	26
Create a Channel .....	26
Delete or Archive a Channel .....	26
<b>Cymbus App Notifications .....</b>	<b>27</b>
Channel Notifications .....	27
<b>Meetings .....</b>	<b>30</b>
Host or Schedule a Meeting .....	30
Schedule a Meeting .....	30
Start a Scheduled Meeting .....	31
Ad-Hoc Meetings (Meet Now) .....	32
Cancel or Change a Meeting .....	33
Schedule Meetings Using Google Calendar .....	34
Install the Cymbus Add-on to Google Calendar .....	35
Schedule a Meeting Using Google Calendar .....	36
Cancel or Change a Meeting .....	38

Schedule Meetings Using Microsoft Outlook .....	39
Before You Start .....	39
Enable Cymbus Outlook Add-in for End Users .....	40
Schedule a Meeting Using Outlook .....	41
Duplicate a Meeting .....	44
Change a Meeting .....	45
Cancel a Meeting .....	46
Export Meetings .....	47
Host Controls for Meetings .....	47
Waiting Room – Approve or Deny Participants Entry .....	48
Manage Participants .....	48
Join a Meeting as a Cymbus User .....	49
Join Using a Meeting Notification .....	49
Join Using the Meetings Tab .....	50
Join Using a Meeting Link .....	51
Join Using a Meeting ID .....	52
Join a Meeting as a Guest .....	52
Use the App and a Meeting Link .....	53
Use the App and a Meeting ID .....	54
Meeting toolbar .....	55
Desktop .....	56
Mobile .....	56
Incoming Calls during a Meeting .....	57
Switching Devices during a Meeting .....	57
Layout of your Meeting Screen .....	57
Shared Screen .....	59
Chat .....	60
Reactions .....	61
Screenshare During a Meeting .....	62
Whiteboard (Desktop) .....	66
Start a Whiteboard Session .....	66
Add Components .....	67
Add Pages .....	67
Save .....	68
End a Whiteboard Session .....	68
Record a Meeting (Desktop) .....	69
What's Recorded? .....	69
Start Recording .....	69

Download Recordings .....	70
Join a Meeting Using a Browser .....	70
Join Using a Browser .....	71
Browser Meeting Toolbar .....	73
Layout of your Meeting Screen .....	74
Share Your Screen Using a Browser .....	76
Join a Meeting via PSTN .....	78
Join as a Participant or a Guest .....	78
Join as a Meeting Host .....	79
<b>URL Launch on Calls (Desktop) .....</b>	<b>81</b>
Step 1: Configure a URL to Launch .....	81
HubSpot .....	82
Zendesk .....	82
Step 2: Enter the URL to the Cymbus App .....	83
Step 3: Log in to your CRM in Browser .....	84
<b>Troubleshooting .....</b>	<b>85</b>
Contact Customer Support .....	85
<b>Cymbus App Release Notes .....</b>	<b>86</b>
Version 1.6.2 (October 23, 2024) .....	86
Version 1.6.0 Fall Release (October 5, 2024) .....	86
Meeting Improvements .....	87
Messaging Improvements .....	88
Contacts Improvements .....	89
Version 1.6.0 (September 25, 2024) .....	90
Version 1.5.4 (August 28, 2024) .....	90
Mobile Navigation Tabs .....	90
Version 1.5.2 (July 24, 2024) .....	91
Quick Access on the Mobile App .....	91
Login Improvements .....	91
Version 1.5.0 Summer Release (July 13, 2024) .....	91
Desktop Redesign .....	91
Meeting Chat Message Reactions .....	92
Video Tile Carousel Improvements for the Speaker View .....	92
Version 1.5.0 (June 26, 2024) .....	93
Meeting Screenshare Improvements .....	93
Messaging Improvements .....	93

Call History Improvements .....	93
Version 1.4.4 (May 15, 2024) .....	94
Version 1.4.2 (April 17, 2024) .....	94
Version 1.4.0 Spring Release (April 13, 2024) .....	94
Messaging Improvements .....	94
Meeting Improvements .....	94
Version 1.4.0 (March 13, 2024) .....	96
Version 1.3.3 (February 3, 2024) .....	96
Meeting Improvements .....	96
Messaging Improvements .....	96
More .....	97
Version 1.3.1 (January 6, 2024) .....	97
New Features .....	97
Available on the Professional Plan .....	98
Version 1.3.0 (December 16, 2023) .....	98
Version 1.2.2 (October 28, 2023) .....	98
Improvements .....	98
Version 1.2.0 (September 23, 2023) .....	98
New Features .....	98
Version 1.1.0 (August 23, 2023) .....	99
New Features for Cymbus Meetings .....	99
Version 1.0.0 (July 11, 2023) .....	99

# Getting Started

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When your Business Cloud Communications (BCC) feature plan includes the Cymbus app, you will receive a welcome email from your service provider that includes links to set your password and download the Cymbus app.

## System Requirements

<b>Windows</b>	Windows 10, Windows 11. Only Pro and Enterprise versions are supported.
<b>Mac</b>	macOS 12 (Monterey), macOS 13 (Ventura), macOS 14 (Sonoma).
<b>iOS</b>	iPhones running iOS 15, iOS 16 or iOS 17. No iPad or iPod are supported.
<b>Android</b>	Certain Android phones* running Android 12, 13, or 14. No Tablets or Chromebooks™ are supported. * Samsung Galaxy S20, S22, S21, A51/A52, and Google Pixel 5, 6, 7 are supported.
<b>Headsets</b>	Supported headsets are: Jabra Evolve, Poly, Apple AirPods (2nd generation and newer), AirPods Pro, AirPods Max.

### VoIP Over Mobile and Cellular Data Notice

Some mobile network operators may prohibit or restrict the use of VoIP functionality over their network and may also impose additional fees or other charges in connection with VoIP use. Cymbus will not be held liable for any charges, fees, or liability imposed by your carrier for use of VoIP over mobile and cellular data.

## Emergency Calls Warning

The Cymbus app on iOS and Android is not intended or designed for placing or supporting calls to emergency service or calls for the purpose of obtaining assistance, help, or aid in the event of an emergency. The Cymbus app on iOS and Android will redirect emergency calls to the native cellular dialer when possible on a basis of best reasonable commercial efforts. However, this functionality is also dependent on the operating system of the mobile device, which is outside of our control and is subject to change at any time.

## Sign In

Sign in with your email address and password. When prompted, give the app the following permissions:

### Permissions on Windows

- Camera
- Microphone
- Notifications

### Permissions on macOS

- Camera
- Microphone
- Notifications
- Screen recording for sharing screen during a meeting

### Permissions on iOS

- Background app refresh
- Camera
- Contacts

- Microphone
- Notifications

## Permissions on Android

- Allow the app to record audio
- Camera
- Contacts
- Make and manage phone calls
- Notifications

### Call Recording Permissions

If you're asked to give the Cymbus app permission to record a call, answer **Yes** even if you do not intend to record calls. It's really asking to access your microphone for making calls, not necessarily for recording.

## Can't Sign In?

Click **Forgot password?** on the login screen, then enter your email address in the browser, and a password reset link will be sent to you. If you don't receive that email, contact Customer Support.

## Exit

We recommend keeping the Cymbus app running in the background so you continue to receive calls and messages. On a mobile device, the Cymbus app uses your cellular data to run in background if it is not connected to Wi-Fi.

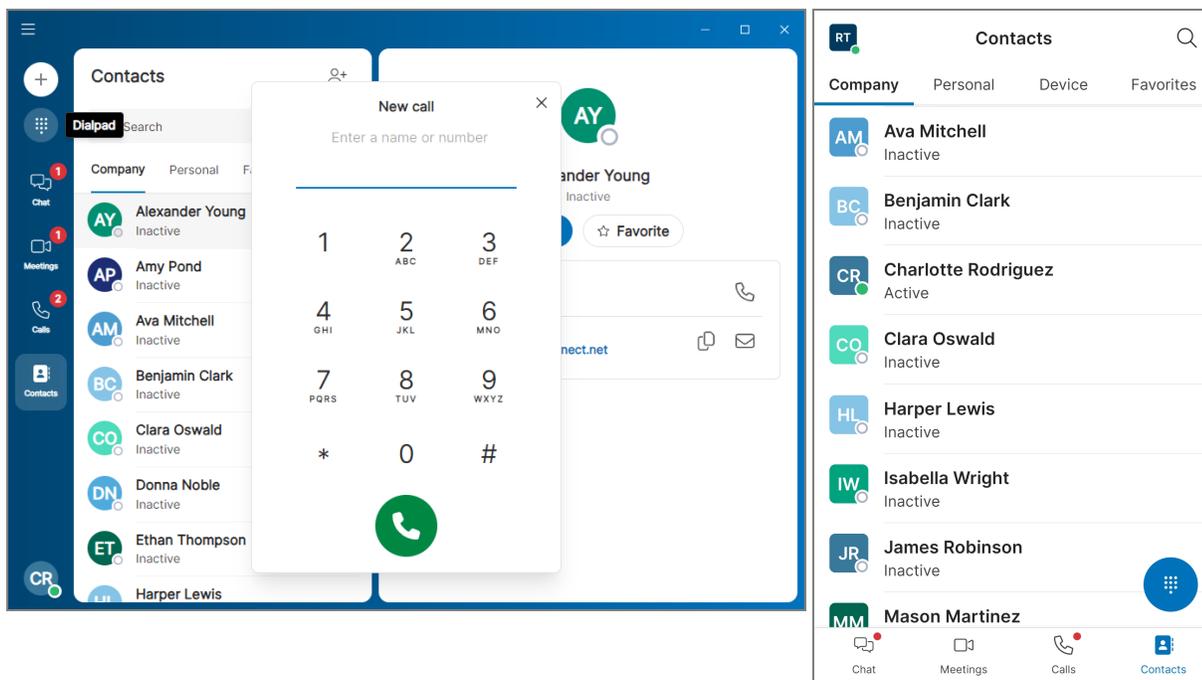
Choose **Sign out** if you want the app to completely stop running. You will not receive any calls, messages, or notifications on this device, and will be required to log in next time you open the app. To sign out, select your initials then **Sign out**.

# Using The Cymbus App

Download the Cymbus app to your devices and log in with your email address and password.

You have access to the same information across all devices you use the app on. For example, if you send a message from your mobile phone, when you come back to your office, you can continue the conversation in the app on your desktop computer. Same for contacts: you can contact the same people regardless of the device you use the app on.

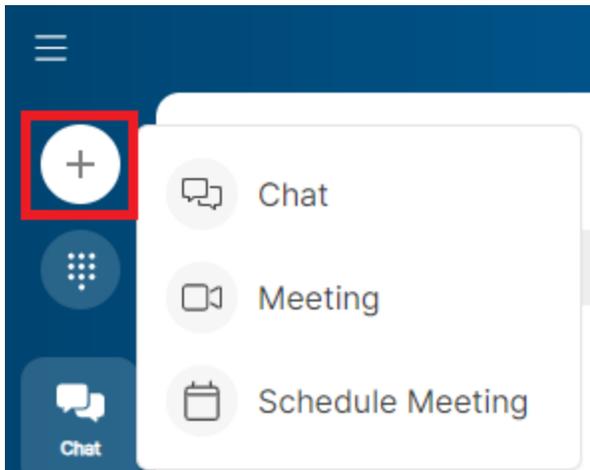
After logging into the app, you are ready to make and receive calls on the same extension number and/or phone number you have on BCC. The app follows the call handling behavior you have in place in the Voice Portal. If you have an IP phone as well as the Cymbus app on your devices, incoming calls to your number will ring to all your devices. If you answer or decline on one device, the other devices stop ringing.



## Navigation Tabs

The navigation tabs are located at the left of the screen on a desktop computer, and at the bottom of the screen on a phone.

- **+ Create New** appears only on the desktop app and gives you a quick access to create a new message, start a meeting (Meet Now), or schedule a new meeting.



- **Dialpad** can be used to dial BCC star codes. On the mobile app, tap the **Contacts** tab or the **Calls** tab and tap the blue button on the bottom right corner.
- **Chat** allow you to exchange messages with your company contacts.
- **Meetings** let you host and join meetings with anyone.
- **Calls** display the history of calls made on all your devices connected to the BCC service. Call history is read-only.
- **Contacts** display company contacts as well as personal contacts you added to the app.
- Select your initials to access Settings, set your custom status, and sign out of the app. On the mobile app, your initials appear in the top left corner. Under Settings, you can switch between light and dark theme, test your audio without making a call, and more.

A red dot on navigation tabs indicates there is a new item for you, such as a new message or voicemail.

## Connect your Headsets

Connect your headsets to your computer or phone, then choose from within the app which headset and speaker to use for calls and meetings. By default, the app uses the system default.

On the desktop app, you can test headset and speaker without making an actual call. In the bottom left corner, select your initials then select **Settings**.

# Calls

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Make sure you have headsets connected to your desktop computer or mobile phone.

## Place a Call

You can place a voice call in multiple ways.

### Using the Dialpad

Select  **Dialpad** on the left bar of the desktop app. On the mobile app, go to the  **Calls** tab and tap  **Dialpad** on the bottom right corner.

- To search contacts by name or number, use the keyboard to type a name or number. As you type, the app will display matching contacts. Select a contact from the list to dial.
- To dial a number, click the 10-digit number keypads and then click  **Call**.
- To redial, click  **Call**; it will bring up the most recent call you made on this device. Then click  **Call** again.

### Using Call History

Go to the  **Calls** tab and select the entry to call the person. On the mobile app, tapping on the entry makes a call. To see details of the call, tap **Info** next to the entry.

### Using Messages

Go to the  **Chats** tab, select a person under **Direct Messages**, then select  **Call** in the top right corner.

### Using Contacts

In the  **Contacts** tab, locate a contact and select  **Call** or select the number you want to dial. To search for a contact, select the list, such as **Company** or **Personal**, before typing a name. The app searches the first and last names on the selected list.

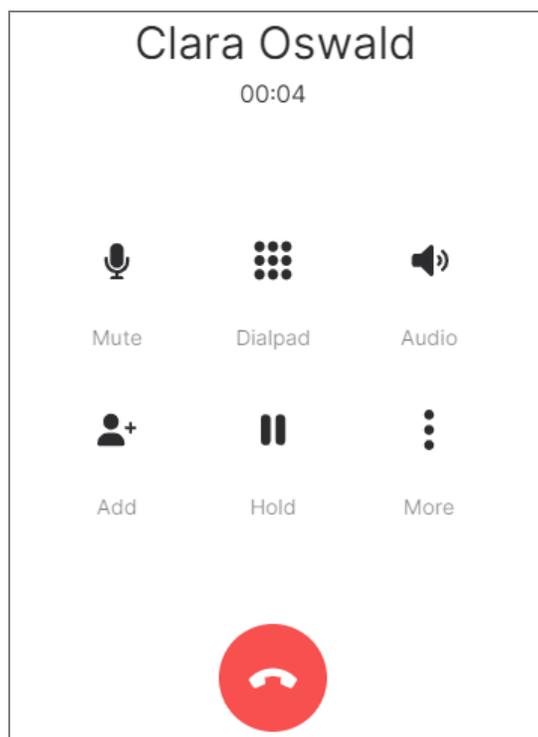
## Answer a Call

When you receive an incoming call, the app notifies you via ringtone, vibration (on mobile phones), and a call screen. The Cymbus app follows operating system's notification settings. See [App Notifications](#) for more information.

When you answer or decline a call on one device, the other devices stop ringing. The declined call then follows your Busy call handling behavior set in the Voice Portal.

## During an Active Call

Use the call screen to mute your voice, add a second call, place the call on hold, and more.



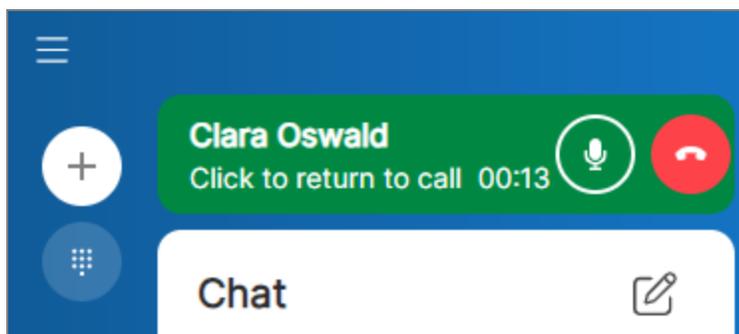
- Mute your voice so the remote party doesn't hear you.
- Use **Dialpad** to follow voice prompts such as "Press 0 to speak to an agent."
- **Audio** or **Speaker** lets you change the speaker for the call. On the desktop app, microphone can also be changed.

- **Add** lets you place a second call. The first call will be on hold until you end the second call or you merge them into a [three-way call](#). To flip between the active calls, select **Swap**.
- **Hold** places the call on hold. The remote party hears music if configured on your BCC service.
- **More > Transfer to** performs a blind transfer.

## Navigate Away from the Call Screen

You can navigate away from the call screen while on an active call.

On the desktop app, click the minimize button in the top right corner to collapse the call screen. To return to the call screen, bring the app to the foreground and click the green highlighted area.



On the mobile app, tap the green bar at the top of the device screen to return to the active call.



# Call Transfer & Merge

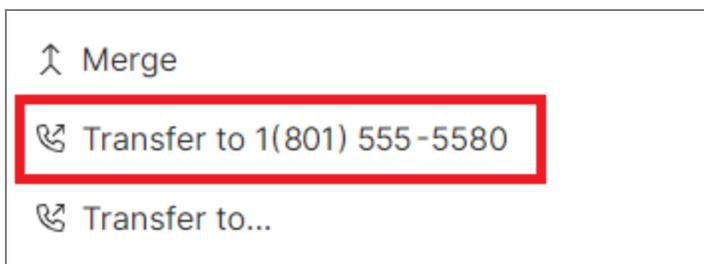
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You can transfer an active call to someone else.

## Attended Transfer

Use an attended transfer when you want to talk to the person you're transferring the call to. The recipient will see your caller ID on the call.

1. While on call, select **Add** on the call screen.
2. Type a name or number of the contact you want to transfer the call to.
3. When the call is answered, speak to the person to inform them of the transfer.
4. When you've finished speaking, select **More > Transfer to [Original Caller]**. The call ends automatically for you.



## Blind Transfer

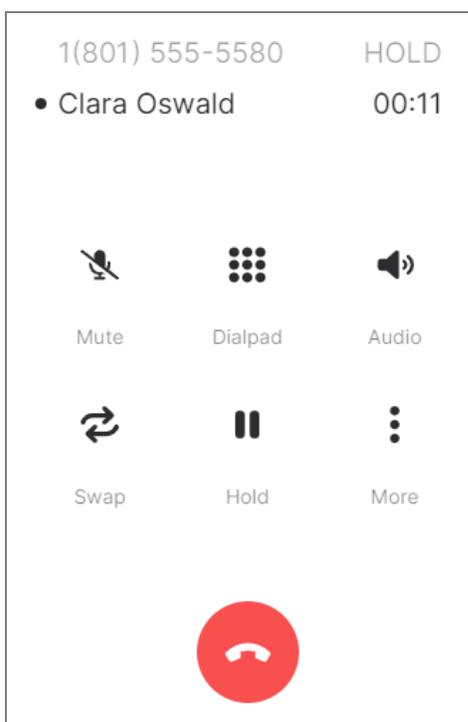
Use a blind transfer if you don't need to talk to the person the call is being transferred to. The recipient will see the call as if it is coming from the original caller.

1. While on call, select **More > Transfer to...** on the call screen. The current call is placed on hold.
2. Type a name or number of the contact you want to transfer the call to. The call ends automatically for you.

# Merge Calls

When you have an active call, you can bring a third person to the call.

1. While on a call, select **Add** on the call screen.
2. Type a name or number of the contact you want to add to the conversation.
3. When you have two calls established, select **More > Merge**. You are in a call with two other people. If you end the three-way call, both remote parties are disconnected.



## No Splitting Into Individual Calls

Once calls are merged into a three-way call, you cannot split them back into separate calls. Instead, end the three-way call, then place an individual call if necessary.

# Call Blocking

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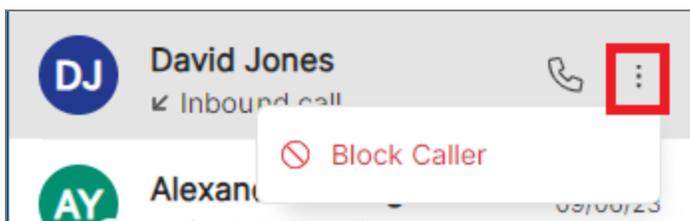
From within the Cymbus app, you can block a phone number that is 7 digit or longer so that you won't receive future calls. Callers will hear a busy signal.

Each user can block up to 200 numbers. Phone numbers shorter than 7 digits, such as an extension, cannot be blocked using the app.

## Block a phone number

Block a phone number to stop receiving future calls.

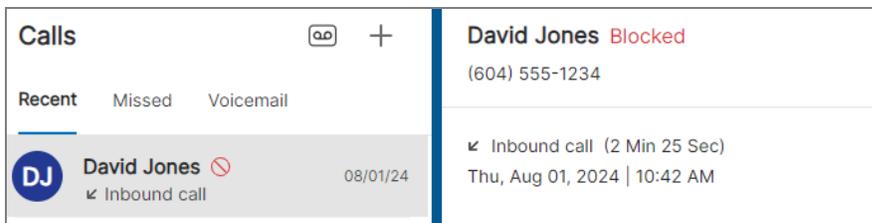
1. Go to the 📞 **Calls** tab, and select the number you want to block.
2. Select ⋮ **More** then **Block Caller**.



The numbers you blocked using the app will be added to your custom screening rules. You can view them under the **Call Screening** section in your Voice Portal.

## Unblock a phone number

1. Go to the 📞 **Calls** tab, and select the number you previously blocked. The app does not have a list of blocked calls, but the call history list indicates blocked calls with an icon and a red text.

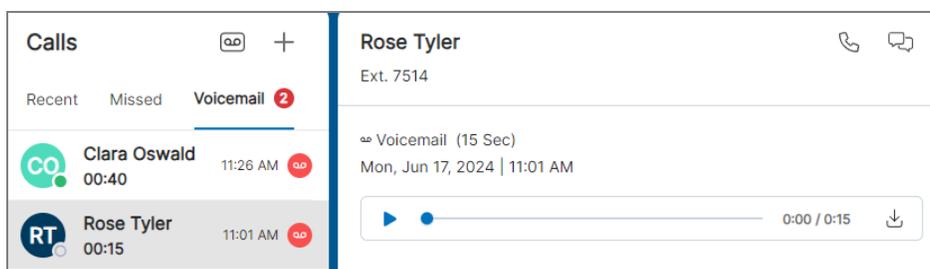


2. Select **More** then **Unblock Caller**.

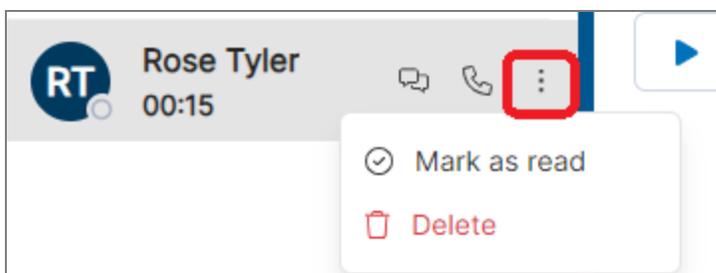
# Voicemail

From the Cymbus app, you can see both new and saved voicemail messages on your BCC account. When someone leaves a new message for you, the app sends you a notification and displays a small red number on the **Calls** tab.

To access your voicemail messages, go to the **Calls** tab and select the **Voicemail** list. Each voicemail message is listed with the caller ID or phone number, date and time, and length of the message.



- **Play.** To listen to a message, select **Play**.
- **Save.** To download the voicemail on the desktop app, select a message then select **Download**. On the mobile app, select **Share** > **Save** to a location of your choice.
- **Delete.** To delete a message on the desktop app, hover over the call entry in the list, and select **More** > **Delete**. On the mobile app, select **Delete**.



## Mark Voicemail as Read or Unread

You can mark a voicemail message as read or unread. When marking it as read, the voicemail will stay displayed under **Voicemail** in the app. When marking it as unread, a red voicemail icon reappears for the specific message, indicating you need to come back to it.

To mark a voicemail as read on the desktop app, hover over the call entry, and click **⋮ More > Mark as read**. On the mobile app, swipe left on the call entry, then tap **⋮ More > Mark as read**.

## Change Greetings

You can change your voicemail greetings in various ways.

- Go to the **📞 Calls** tab and select the **🗨️ Greetings** icon on desktop or the **🗨️** icon on the top right corner of the mobile app. Enter your PIN to access your voicemail box.
- Use the app's dialpad and dial the Voicemail Management star code. Enter your PIN to access your voicemail box.
- Log in to Voice Portal to access your voicemails online.

# Emergency Calls (911)

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The Cymbus app handles emergency calls differently depending on the operating system of your device.

## Desktop (Windows and Mac)

Calls to 911 or other emergency services can be dialed from the Cymbus desktop app connected to your voice service. Upon logging in to the app, you will be asked to make sure that the emergency location registered in your Voice Portal is accurate.

- To update your emergency location, click **Update**, then log in to the Voice Portal and update your emergency location.
- If you don't need to make any changes, click **×** to close the dialog.

If there is a power or internet outage, your desktop app may be unavailable to dial 911.

## Mobile (iOS and Android)

The Cymbus mobile app does not call 911 or other emergency services; it redirects such calls to the native cellular dialer when possible. You must have a SIM or eSIM activated on their mobile phone in order to place an emergency call.

When you place an emergency call in the Cymbus mobile app, the native dialer opens with the emergency phone number populated, and waits for you to initiate the call. After the emergency call ends, the Call History in the Cymbus app shows that an emergency call was made from the mobile app, but the actual emergency call was placed using your cellular service.

### Emergency Calls Warning

The Cymbus app on iOS and Android is not intended or designed for placing or supporting calls to emergency service or calls for the purpose of obtaining assistance, help, or aid in

the event of an emergency. The Cymbus app on iOS and Android will redirect emergency calls to the native cellular dialer when possible on a basis of best reasonable commercial efforts. However, this functionality is also dependent on the operating system of the mobile device, which is outside of our control and is subject to change at any time.

# Contacts & Presence

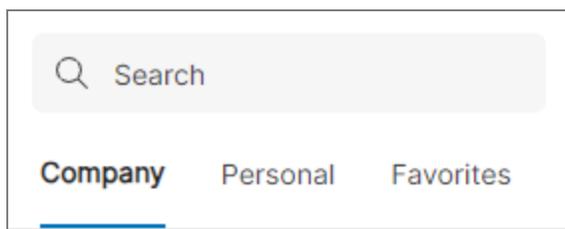
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The  **Contacts** tab shows all the contacts you have in the app which are synced across the devices you are logged in.

- **Company** displays each of your colleagues and their online presence. This list is read-only and managed by your system administrator.
- **Personal** allows you to add a contact to the Cymbus app. Your system administrators do not see or have any access to your personal contacts.
- **Device** shows the contacts you have on your mobile device. The Cymbus app needs your permission to access your contacts. These contacts do not appear across other devices until you add to personal contacts.
- **Favorites** gives you a quick access to the people you often engage with. You can mark any Company and Personal contact as favorite.

## Search for a Contact

To search for a contact, select the list, such as **Company** or **Personal**, before typing a name. The app searches the first and last names on the selected list. For example, to locate a colleague, select the **Company** list, then enter the person's name in the **Search** field.



If you are searching for a contact to make a phone call, use the dialpad which searches all contact types — Company, Personal, and Device contacts on mobile.

## Presence

When you log in to the app, contacts on the **Company** list see you as **Active** and know you are available for calls and messages. The app automatically updates your status to **On the phone** when you have an active call on one of the apps.

In the app, you can update your status to **Inactive**, or set a custom status to go with your current status. If you update to Inactive, you appear offline to the other people (not available for calls or messages); however, you can still make and receive calls and exchange messages. Notifications work in the same way as when your status is Active.

To update your status or set a custom status, select your initials in the bottom left corner. Once saved, your changes are synced to all your Cymbus app devices.

## Personal Contacts

You can add contacts manually one by one to the **Personal** list on the  **Contacts** tab. There is no import or export available. Up to four phone numbers and three email addresses can be saved for a personal contact.

- **Add.** On the desktop app, select  **Create Personal Contact**. On the mobile app, select the **Personal** list, then tap **+** in the top right corner.
- **Edit.** Select a contact, then select **Edit**. When you're done, select **Save Changes**.
- **Delete.** Select a contact, select **Edit**, then scroll down and select **Delete Contact**. The contact will be deleted from the **Personal** and **Favorites** lists on all your Cymbus app devices.

## Device Contacts (On Mobile Phones)

With the Cymbus mobile app, you can call a contact saved on your phone. Give the Cymbus app a permission to access your contacts, then the **Device** list appears on the  **Contacts** tab. To do so, open the Cymbus app, select your initials, go to **Settings > Privacy** then enable **Show phone contacts**. It takes you to the OS's app permission screen.

To edit a device contact, use your native Contacts app on your phone. Your changes soon appear in the **Device** list of the Cymbus mobile app.

You also can add your mobile contact to the **Personal** list so the contact appears on all of your Cymbus devices. Remember, this creates a duplicate entry in the Personal list; you will see the same person both on Personal and Device lists.

- When you change the contact information in your native Contacts app, the changes will only be reflected on the contact in the Device list, but not in Personal.
- Deleting the contact in Personal does not delete the contact in Device nor in your native Contacts app.

## Favorites

To add a contact to the **Favorites** list, locate and select a contact, then select **Favorite**. The contact appears under the **Favorites** list.

To remove a contact from the **Favorites** list, select a contact, and select **Favorites**. The contact disappears from the **Favorites** list but remains on the other list.

# Messaging

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Use the  **Chat** tab to exchange messages with the contacts on your **Company** list, either via Direct Messages or [via Channels](#).

## Search

The Search field on the  **Chat** tab filters direct messages and channels as you type.

### No searching content

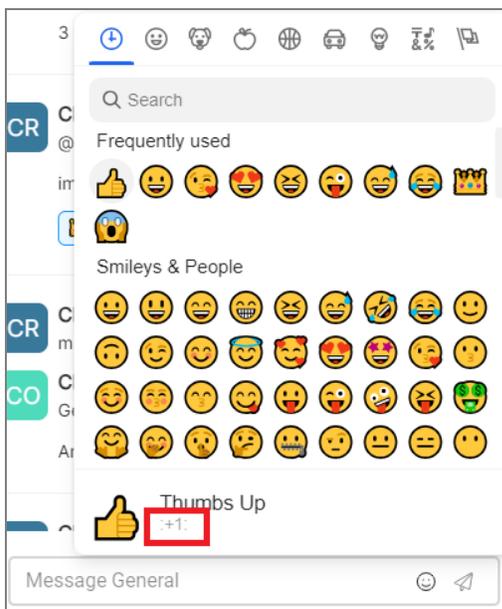
The app does not search content of the messages; it only searches contact names and channel names.

## Messages

- **Send.** On the desktop app, pressing `Enter` sends the message. To start a new line within a message, press `Shift + Enter`. On the mobile app, tapping the  **Send** icon sends the message. To start a new line within a message, tap the **return** key on the on-screen keyboard.
- **Copy.** On the desktop app, you can copy part of a message or multiple messages. On the mobile app, you can only copy the whole message, one by one.
- **Delete or Edit.** You can delete or edit a message within five minutes of sending. On the desktop app, hover over the message and select **More > Delete** or **Edit**. On the mobile app, long-press the message then select **Delete** or **Edit**. The recipient will see (Message deleted) or (edited), but they won't receive a notification for the edited message.
- **Mark Unread.** Mark received messages as unread so you can come back to it later. On the desktop app, hover over the message and select **More > Mark Unread**. On the mobile app, long-press the message and select **Mark Unread**. The next time you open the conversation, the app jumps to the unread message and displays with the New indicator

and an updated badge.

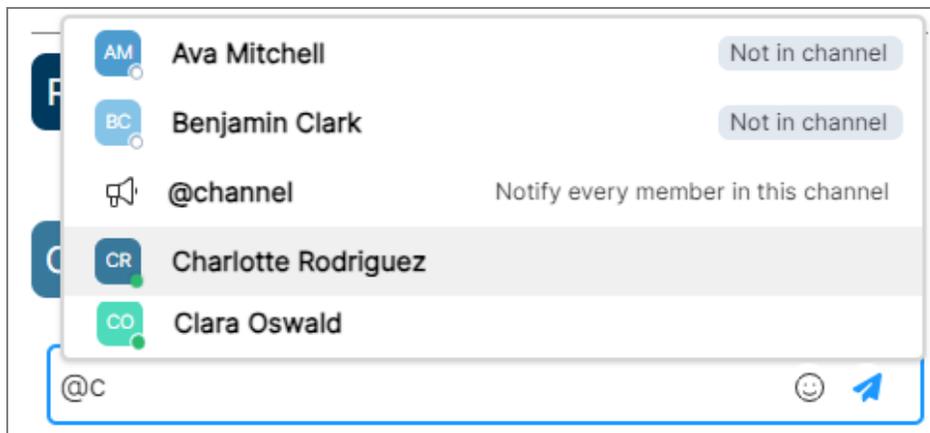
- **Insert Emoji.** You can add an emoji in your message by selecting from an emoji list. An emoji can also be added by typing a name, such as `:laughing:`. To find an emoji name, select the smiley face icon in the text field to open the emoji list, and hover over the emoji. The name appears at the bottom.



## Mentions

Tag someone in a message to get their attention. Type @ and select a name by using the arrow keys or the mouse. The mentioned person will be [notified via a badge on the channel, and via a notification](#) if they've set to receive notifications for mentions. Type @channel to tag everyone in the channel both online and offline.

When mentioning people, the Cymbus app will show if each user is already in the channel. If they are not, you have an option to add and mention the person with one click.



## Reactions

Respond to messages with emoji reactions.

### Add a Reaction

1. Hover over (desktop) or long-press (mobile) the message you want to add a reaction to.
2. Select the smiley face icon to open the list.



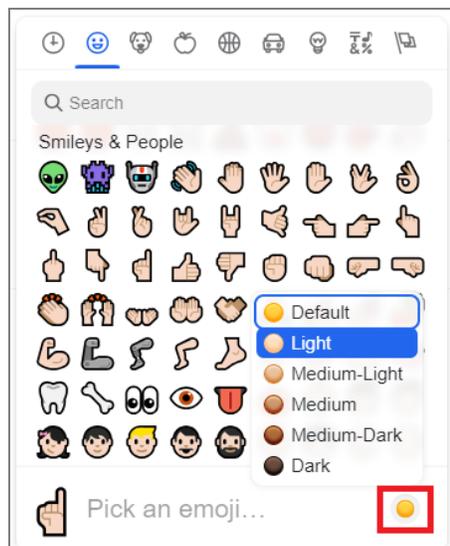
3. Use the icons to browse categories or the search field to find something specific. On the mobile app, you can swipe up to expand the list, or swipe down to close it.
4. Select an emoji to add it to the message.

### Remove a Reaction

To remove a reaction you added, select the emoji.

## Emoji Skin Tone

On the desktop app only, you can set a skin tone. Open the emoji menu and click the circle on the bottom right to select a skin tone.

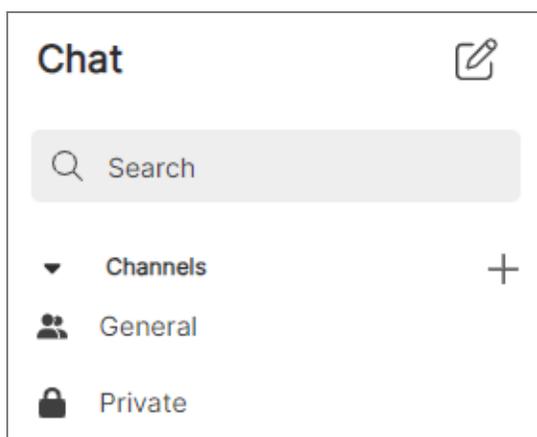


# Messaging Via Channels

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## Channels

All users are added to the **General** channel. Anyone can create a channel both public and private. Anyone in your organization can join a public channel by searching. On the other hand, private channels are invite-only and do not appear in search results unless you are already part of it. Once a channel is created, it cannot be converted from public to private, or vice versa.



## Join a Channel

- **Public Channel:** To search for and join a public channel, use the Search field and scroll down the list. You can view the most recent messages in a channel before joining. Once you join, you will receive notifications on new messages and will be able to post a message in the channel.
- **Private Channel:** You automatically join a private channel when someone invites you to it. Your Cymbus app shows the private channel on the  **Chat** tab with a lock icon, and you receive notifications on new messages in the channel.

## Set Channel Notifications

For each channel you join, you can customize what items you want to receive notifications for. See [App Notifications](#) for details.

## Add People to a Channel

To add people to a channel, open the **Channel Details** page as described above and select the **Members** tab. Type in names and select **Add**.

If you are adding a member to a private channel, new members will be able to view previous messages.

## Create a Channel

When you create a new channel, you are the channel owner. Only the channel owner can change its name and description.

1. In  **Chat**, select the + button next to **Channels**.
2. Type a channel name, then add people by typing their names.
3. If you want to make the channel private, toggle on **Set to private**.
4. Select **Create**.

## Delete or Archive a Channel

Once a channel is created, it cannot be deleted or archived; however, any and all members can leave a channel. The channel description can be edited by the owner to indicate it's no longer active.

To leave a channel so that it continues without you:

- On the desktop app, hover over the channel to reveal  **More** and select **Leave Channel**.
- On the mobile app, open the channel and tap the channel name, and select **Settings > Leave Channel**.

# Cymbus App Notifications

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The Cymbus app notifies you of items that require your attention, such as:

- **Calls:** Incoming calls, missed calls, unread voicemails.
- **Chat:** New direct messages, new channel messages, mentions. Tip: You can customize each channel for tailored alerts. See the Channel Notifications section below.
- **Meetings:** New meetings, meeting changes and cancellations, and reminders such as starting soon.

For such occasions, the Cymbus app plays a ringtone, vibrates your mobile phone, and displays a notification toast and a badge. If you are logged in to Cymbus from multiple devices, all devices notify you of the same event. The Cymbus app follows your operating system's (OS) notification settings. You can customize **how** you want to be notified by changing OS settings on each device. For example, you can turn off all notifications on a mobile phone if you mainly use a desktop computer for all communications. Every OS is different, but it's usually under **Settings > Notifications**.

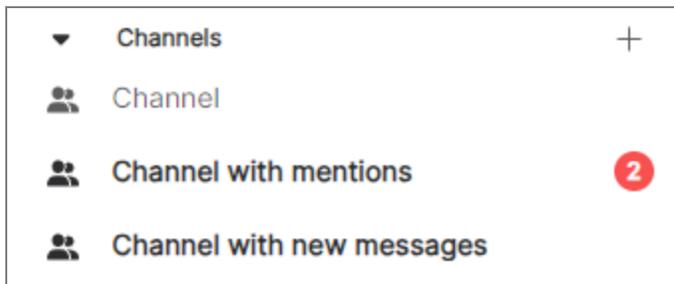
## Channel Notifications

If you have joined many channels, receiving a notification for every new message may be overwhelming. For each channel you are part of, you can customize what messages you want to be alerted for. Your channel preferences will be synced across all of your Cymbus devices.

For each channel, set the app to send notifications for:

- **All Messages in a channel.** This is the default.
- **Only @mentions.** You'll receive a notification only when someone tags you in the channel or tags @channel to get everyone's attention.
- **Off.** No notifications at all for this channel even when someone tags you.

Regardless of this preference, the channel name appears in bold to indicate it has unread messages, and displays a notification badge to indicate the channel has mentions for you.

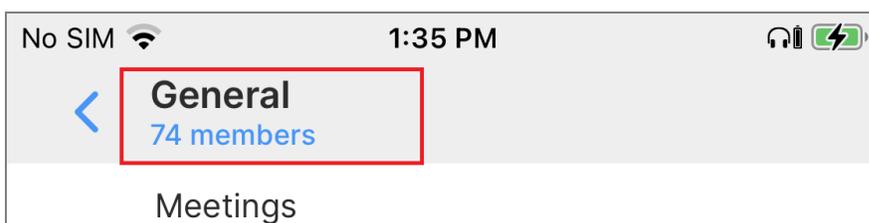


To change notification preferences for a channel:

1. Go to the  **Chat** tab.
2. On the desktop app, hover over the channel to reveal  **More** and select **Channel Details**.

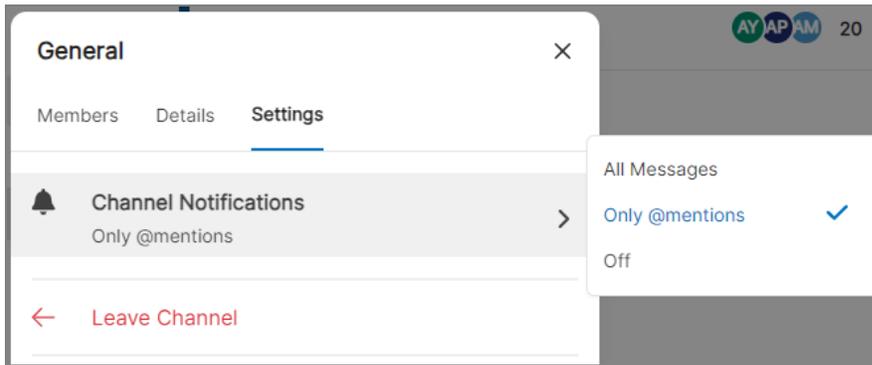


On the mobile app, open the channel and tap the channel name in the header.



3. Go to the **Settings** tab and select **Channel Notifications**.
4. Select which messages you want to receive notifications for: All Messages, Only

@mentions, or Off.



# Meetings

## Host or Schedule a Meeting

To host a meeting, you must have the *Professional* feature plan.

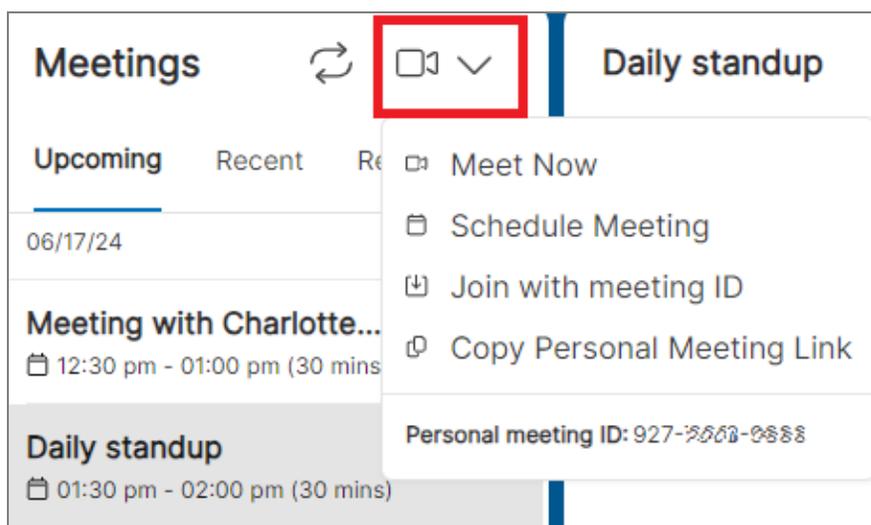
You can invite anyone on the **Company** contact list as well as anyone with an email address. You can schedule one-time and recurring meetings, or [start an ad-hoc meeting](#) whenever needed.

Anyone can join a meeting anytime, even before the meeting is scheduled to start or without the host as long as they have an ID or a link for the meeting. Up to 250 participants can join a Cymbus meeting, but only 25 participants can send their video.

Enable a waiting room so no one joins the meeting until you approve entry.

## Schedule a Meeting

1. Go to  **Meetings**, select  **New Meeting**, and then select **Schedule Meeting**.



2. In the **Invite people** field, add participants by typing their name or email address.

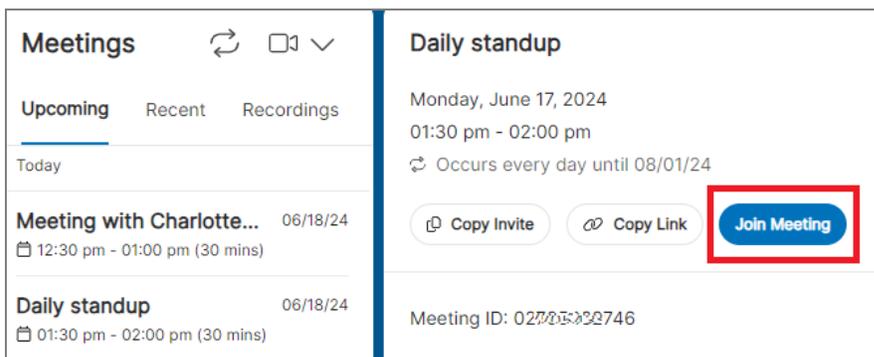
- Configure meeting settings. If you choose to generate a meeting ID automatically, you have options to enable a passcode and a waiting room. If scheduling a recurring meeting, the meeting ID stays the same for the whole series.
  - Enable a waiting room so that the host approves each participant upon entry.
  - Enable a passcode for participants to join. The passcode must be 6 digits (numbers only).
- Select **Save**. The scheduled meeting appears in the **Upcoming** list.

If people you invited through their email address didn't get a meeting invite, ensure they check their Spam folder. The sender is [noreply@cymbus.com](mailto:noreply@cymbus.com).

See how to [cancel or change a scheduled meeting](#), or [export a scheduled meeting](#).

## Start a Scheduled Meeting

- When it's time for a meeting, go to the **Upcoming** list and select the meeting.
- Select **Join Meeting**.



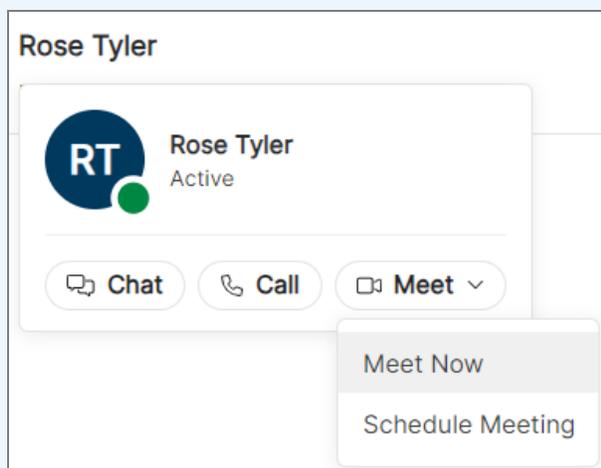
- In the preview dialog, set meeting preferences such as mute, background blur, and camera.
- [Approve or deny participants entry](#) if you enabled a waiting room. No one can join the meeting until approved.

## Ad-Hoc Meetings (Meet Now)

Start a meeting anytime using the **Meet Now** button. The Meet Now meetings always use your personal meeting ID. Participants can join your Meet Now meeting by clicking a link or entering your personal meeting ID.

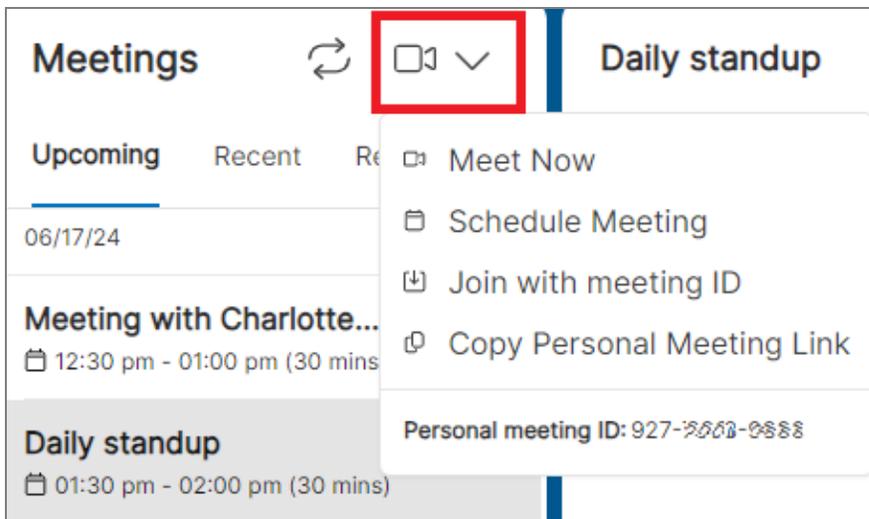
### The Quickest Way to Start Meet Now on the Desktop app

When you want to have a quick call with someone, hover over their name on the desktop app to reveal a contact card where you can start a Meet Now meeting. When you click **Meet Now**, the app messages them with your meeting link, and start a meeting for both to join.



1. Send your personal meeting ID or a meeting link to the participants via messaging or email.

Select  **New Meeting** to see your personal meeting ID. Or use **Copy Personal Meeting Link** to copy the link to your clipboard.



2. To start the meeting, select **Meet Now** on the  **Meetings** tab.

Alternatively on the desktop app, you can start a Meet Now meeting by selecting **+ Create New > Meeting** on the left-side navigation bar.

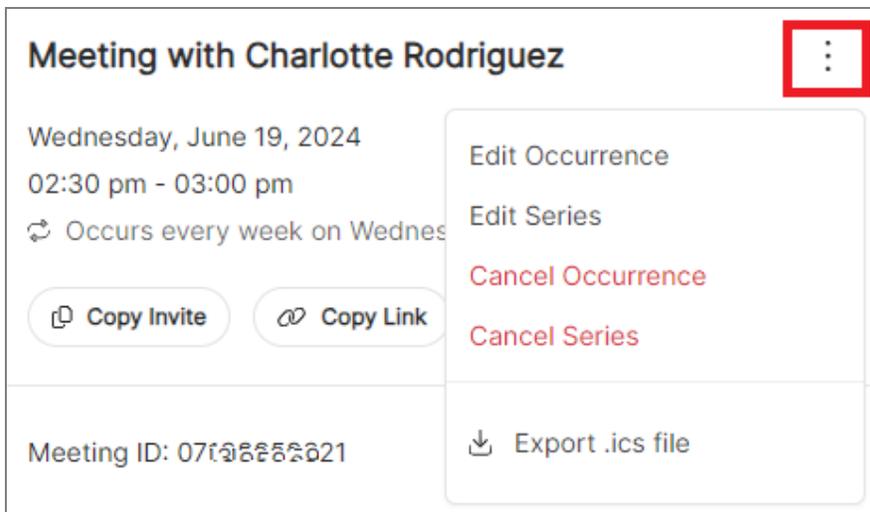
3. In the preview dialog, set meeting preferences such as mute, camera and background effects. You are now in the meeting.

Ad-hoc meetings do not appear in the **Recent** list after they ended.

## Cancel or Change a Meeting

The host can cancel or change the details of a scheduled meeting. If the meeting is recurring, the host can choose just one occurrence or the whole series to apply changes.

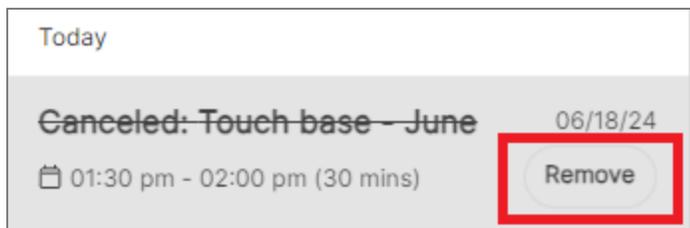
1. Go to  **Meetings** and select a meeting you want to cancel or change.
2. Select **⋮ More** in the top right corner, and select the task you want.



3. Make the changes and select **Save**.

Invitees will see a notification of the change if they are Cymbus users. They can also refresh the **Upcoming** list to see the changes or cancellation.

The canceled meeting appears crossed out in the **Upcoming** list. To remove a canceled meeting from the **Upcoming** list, select **Remove**.



## Schedule Meetings Using Google Calendar

The BCC users with the *Professional* plan can schedule Cymbus meetings using Google Calendar. This is a perfect solution for users who want to use Google Calendar on a Windows or Mac computer to schedule many meetings.

Install the Cymbus add-on to your Google Calendar, then sign into the add-on using your Cymbus account. When using Google Calendar to schedule a meeting, you can add a Cymbus meeting link with a single click, invite anyone with an email address, and configure options for waiting room and passcode. Invitees will receive your invite in their email inbox where they can respond. If invitees are Cymbus users, they see your meeting in their Cymbus app as well.

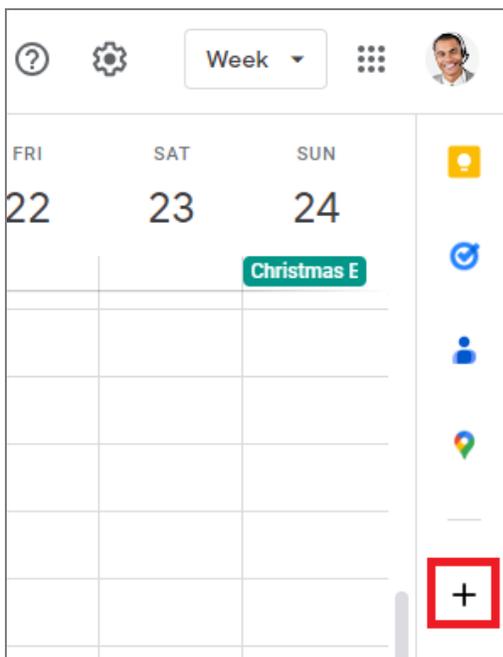
### Getting Invited to a Meeting

Be sure to check the Cymbus app for meetings hosted by other Cymbus users. This add-on integrates the meetings you schedule using Google Calendar, but it does not automatically populate Cymbus meeting invites from other users in Google Calendar.

## Install the Cymbus Add-on to Google Calendar

The Cymbus add-on requires a permission to access your Google account as well as your Google Calendar. Once installed, the Cymbus add-on is available in your Google Calendar even when you use a different computer.

1. Log in to Google Calendar and click + on your Calendar sidebar.



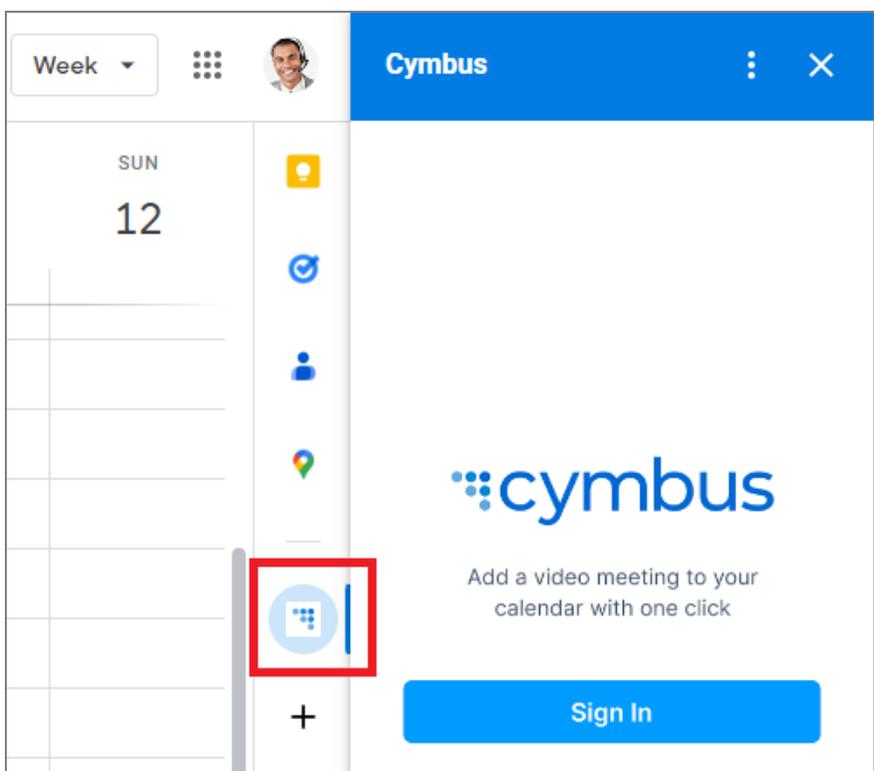
2. In the pop-up, search for Cymbus and click the Cymbus add-on to see details. Alternatively, visit [this link](#).
3. Click **Install**.
4. Choose an account with which you use Google Calendar.

5. Give the Cymbus add-on to access your Google account. When complete, the Cymbus icon appears on your Calendar sidebar.

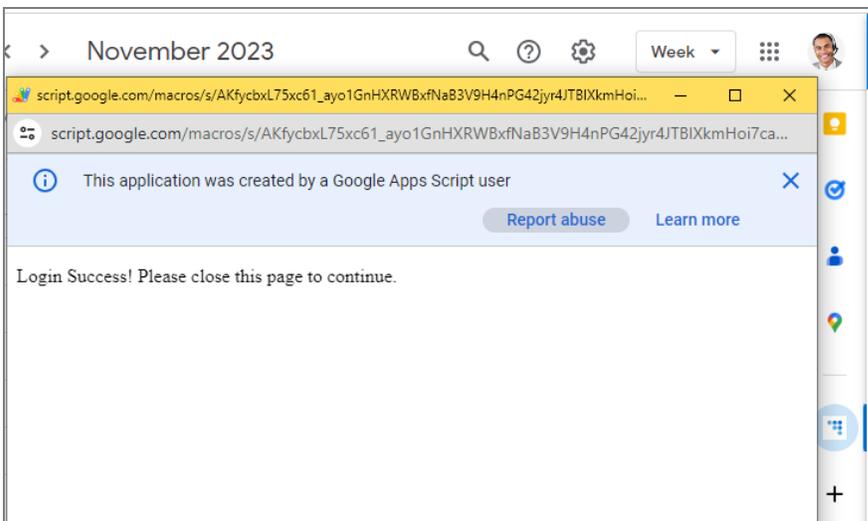
## Schedule a Meeting Using Google Calendar

With a single click, you can add a Cymbus meeting link to the new meeting invite instead of a Google Meet video conferencing. Options to enable waiting room and passcode are available within the add-on.

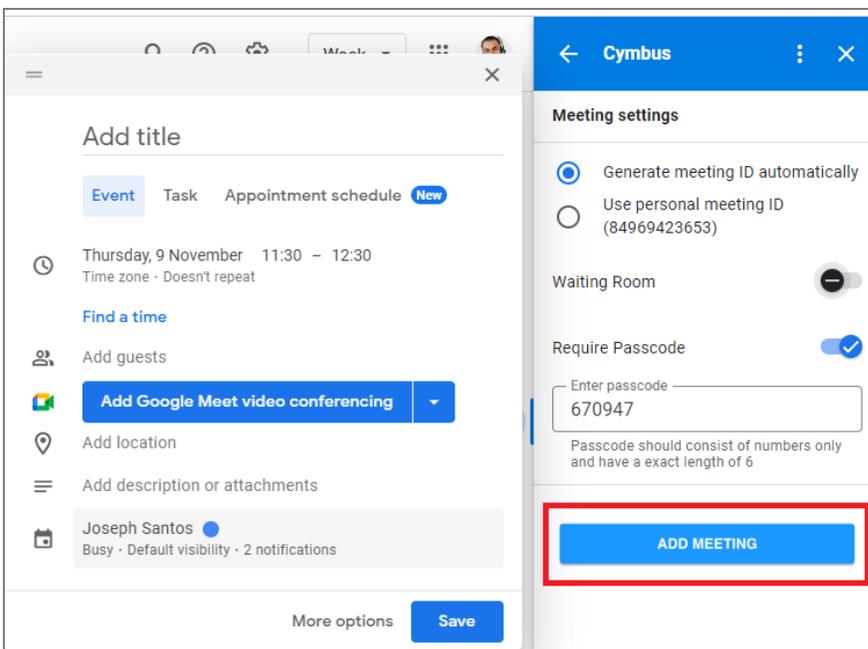
1. Log into Google Calendar using your Google account.
2. On the sidebar, click the Cymbus icon to open the Cymbus add-on, then click **Sign In**.



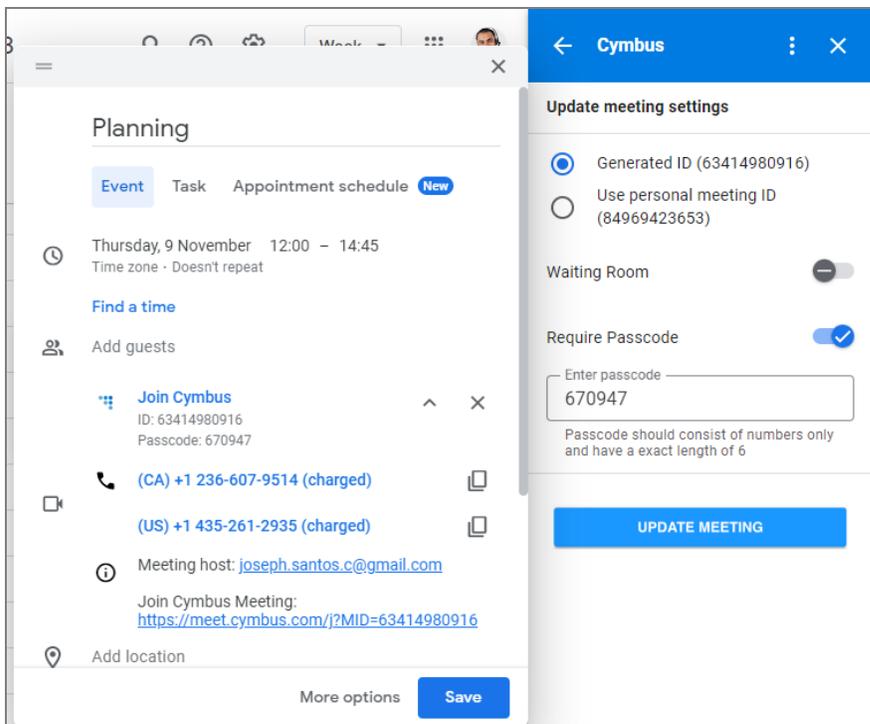
3. Log into the Cymbus add-on using your Cymbus account, which is typically different from your Google account used for Google Calendar.
4. When the "Login Success!" page appears, close the pop-up. The add-on page shows your Cymbus username. You are now ready to schedule a meeting.



- 5. On the top left corner, click **Create > Event**. Alternatively, click the time slot you want in the calendar. The New Event dialog opens.
- 6. In the add-on page on the right, configure the Cymbus meeting such as Meeting ID, waiting room and a passcode if applicable, then click **Add Meeting**. The New Event dialog now displays the Cymbus meeting link.



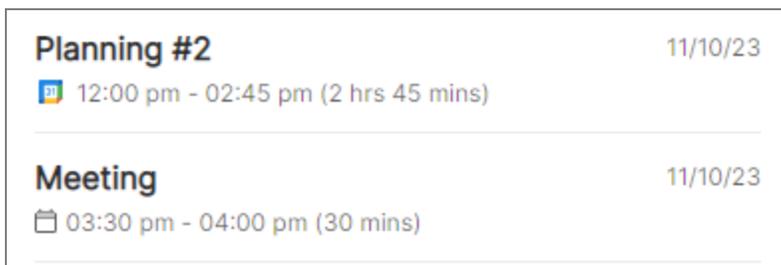
- 7. In the New Event dialog, add a title and participants, and set a recurrence and notifications.



8. Click **Save** in the New Event dialog.

The scheduled meeting appears under your Google Calendar. Invitees receive your invite in their email inbox where they can respond to your invite. Use Google Calendar to see their responses.

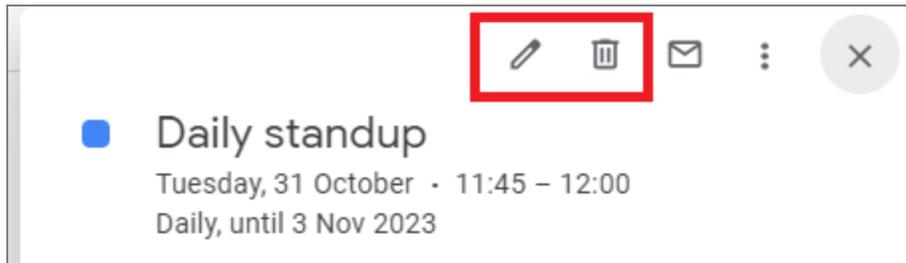
In the Cymbus app, click **Refresh** on the **Upcoming** list to see the new meeting with the Google Calendar icon.



## Cancel or Change a Meeting

Use Google Calendar to cancel or change the meeting that was originally scheduled by using Google Calendar. Do not use the Cymbus app to do so because it does *not* notify other participants or sync your Google Calendar.

To cancel or change a meeting, go to Google Calendar, select the meeting, then click the icon.



## Schedule Meetings Using Microsoft Outlook

The Cymbus add-in for Outlook allows you to send Cymbus meeting invites from Outlook. In just a few clicks, you can add your Meeting URL, configure the waiting room and passcode settings, and send it to anyone with an email address. Invitees can respond from the invite email. If invitees are also Cymbus users, they will see the meeting in their Cymbus app as well.

Available on the Professional feature plan only.

### Important

This add-in integrates the Cymbus meetings you schedule from Outlook into your Cymbus apps, but it does not automatically populate Cymbus meetings invites from other users into Outlook. Be sure to check the Cymbus app for meetings hosted by other users.

## Before You Start

Make sure your Outlook meets the requirements for the Cymbus add-in.

- Your organization has a business or enterprise account for Microsoft 365, previously known as Office 365. A personal account might work with the Cymbus add-in, but it has not been tested.
- Your Outlook application must be 2016 or newer. The Outlook apps on mobile phones do not work with the Cymbus add-in.

- Use the new Outlook interface. The classic Outlook interface does not work with the Cymbus add-in.

## Enable Cymbus Outlook Add-in for End Users

This section is performed by the IT admin at your organization.

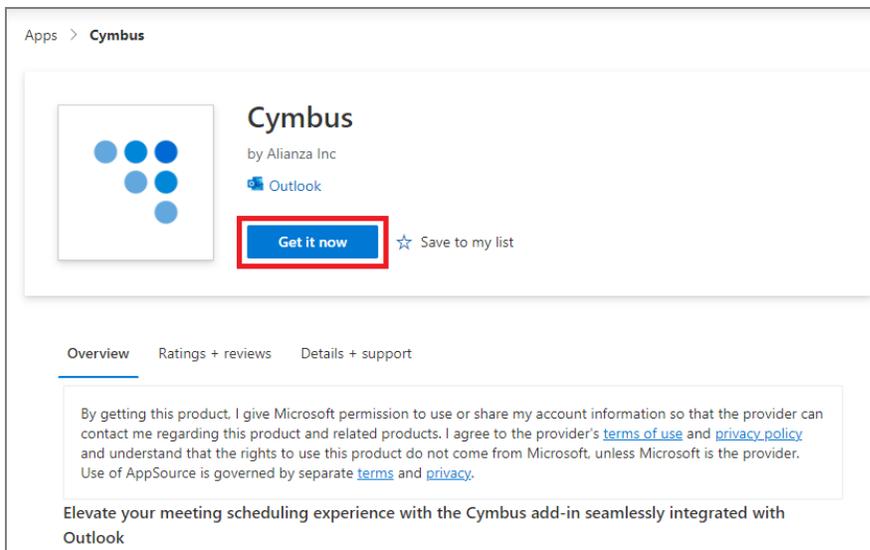
Because the Cymbus Outlook add-in uses event-based activation, meaning it runs tasks when certain events occur, it must be deployed by an organization's admin on behalf of their end users. Event-based activation is restricted if the end user acquired the add-in directly from AppSource.

As the IT administrator for your organization, follow the steps below to enable the Cymbus add-in for your end users.

1. If you are using a Windows computer, open Microsoft Edge. If you are using a Mac computer, open Chrome. Using other browsers results in an error.
2. Go to [AppSource.com](https://appsource.microsoft.com) and make sure you are logged in with your Microsoft 365 admin account.
3. Open the following flight code URL in the browser:

```
https://appsource.microsoft.com/product/office/WA200006275?flightCodes=CymbusMeetings
```

4. On the add-in listing page, click **Get it now**.



5. Follow the prompts to proceed.
6. In the Deploy New App wizard, select users to assign the Cymbus add-in to. Choose from just yourself, the entire organization, or specific users.
7. Review the permissions requests and click **Next**.
8. Review and finish deployment.

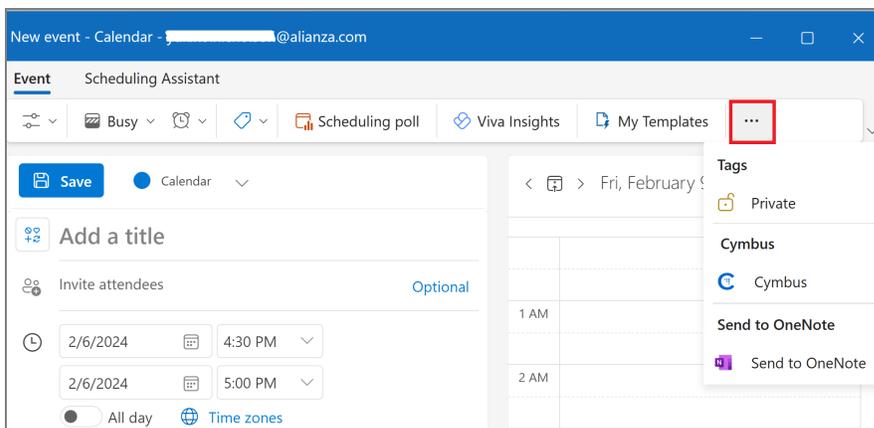
It can take up to six hours for the add-in to appear in Outlook. Once complete, users see the Cymbus add-in when they create a new meeting in Outlook.

## Schedule a Meeting Using Outlook

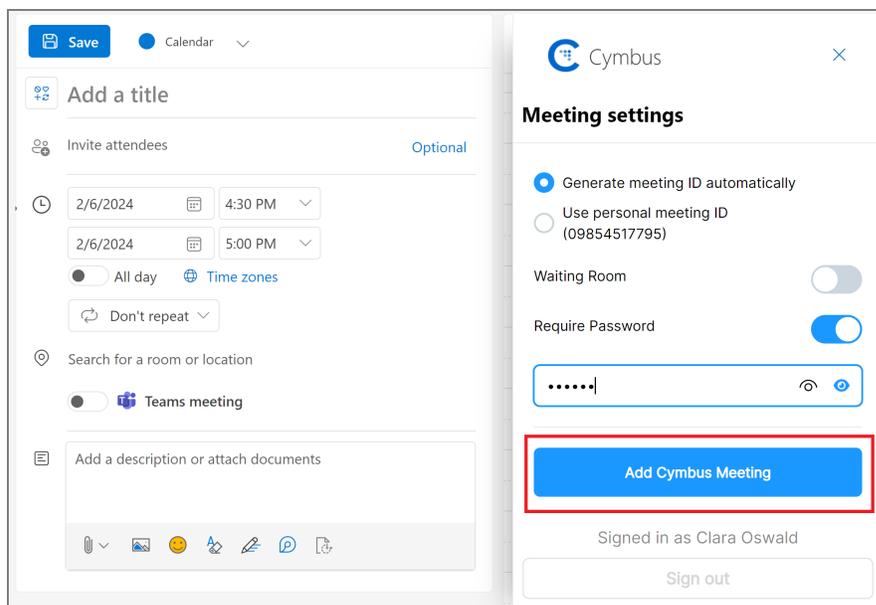
Once your IT admin enables the Cymbus add-in for your organization, it will be displayed in Outlook.

We don't recommend running both the Outlook desktop application and the Outlook web app at the same time. It is a good habit to close the Outlook web app after every use.

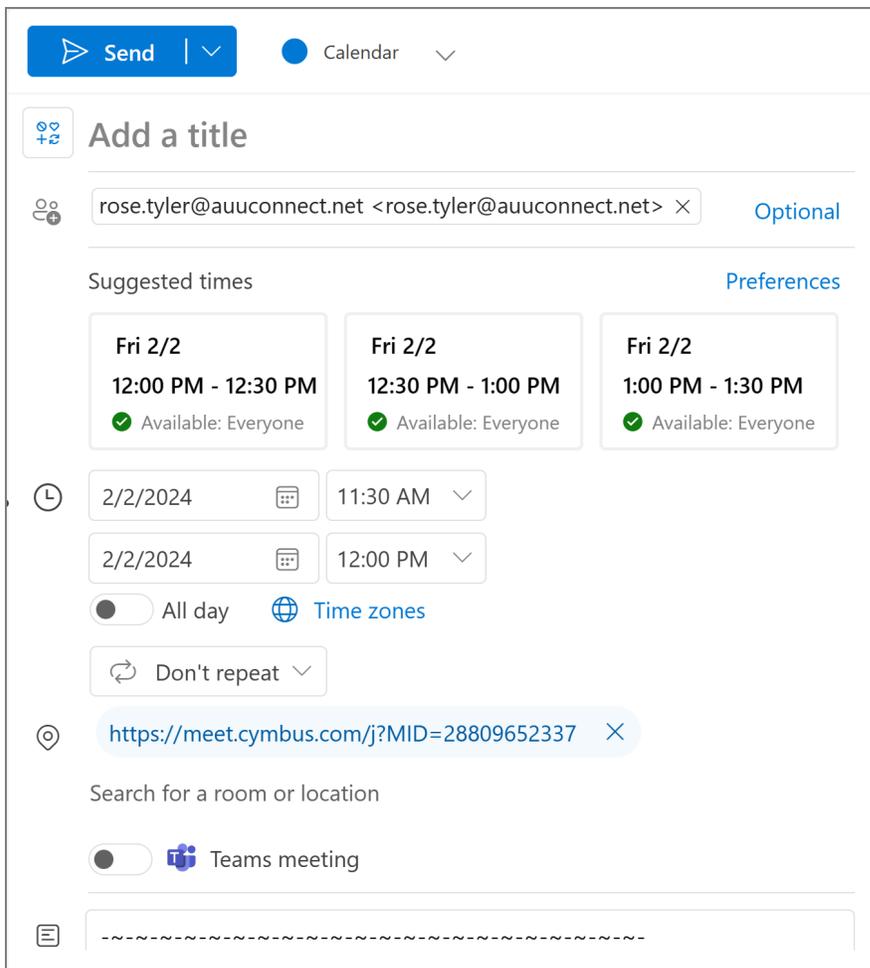
1. Open Outlook on your desktop computer.
2. Click **New event**. Alternatively, click the time slot you want in the calendar, then click **More options**. The New event dialog opens.
3. On the tool bar, click the three-dots button to reveal the Cymbus add-in. Click Cymbus to open the add-in.



4. Click **Sign In**, then click **Allow** to open a new window.
5. Log in to the Cymbus add-in using your Cymbus account, which is different from your Microsoft account.
6. In the right pane, configure the Cymbus meeting settings, including the Meeting ID, waiting room and a passcode settings as needed.



7. Click **Add Cymbus Meeting** on the right pane. The meeting link is added to the invite.



8. In the **New event** dialog, add participants and set the time, recurrence, and notification reminders.
9. Click **Save** to send the invite. Wait for some time to sync Outlook with Cymbus.

The scheduled meeting appears in your Outlook. In the Cymbus app, click **Refresh** on the Upcoming list to see the new meeting.

Invitees receive your invite in their email inbox where they can respond to your invite. Use Outlook to see their responses.

## Duplicate a Meeting

On Outlook for Windows, **do not use** the option to duplicate a Cymbus meeting. Duplicated meetings do not show up in the Cymbus app. Instead, create a meeting using the Cymbus side

bar as described in the previous section.

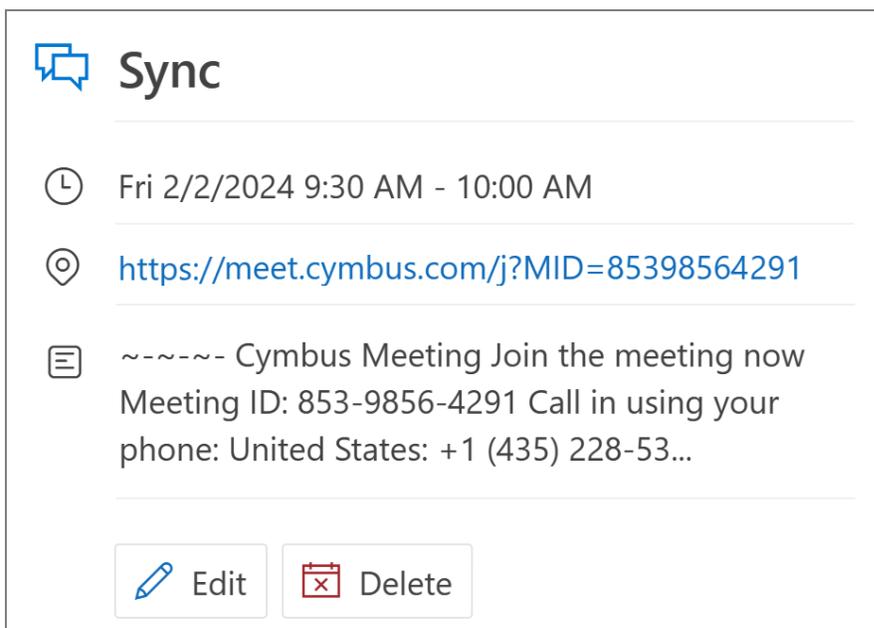
## Change a Meeting

Use Outlook to change a meeting that was originally scheduled by Outlook. Do not use the Cymbus app to do so because it does *not* notify other participants or sync your Outlook.

### No Drag and Drop

Do not drag and drop to move the meeting in the calendar, especially on Mac computers, because the meeting time cannot sync with the Cymbus add-in. Make sure to click **Edit** to open a pop-up and change the meeting time there.

1. In Outlook, select the meeting you want to change.
2. Click **Edit** at the bottom of the pop-up. Pick which event(s) to edit if this is a recurring meeting.



3. Make the change you want and click **Send**.



## Export Meetings

Using the desktop app only, anyone (both the host and invitees) can export a meeting to another calendar, such as Google or Outlook, using an .ics file. If a meeting is recurring, the whole series will be exported by one .ics file.

### No updates for exported meetings

If the host changes or cancels the meeting after you exported the .ics file, you will not see the changes or cancellation on your external calendar (Google or Outlook). Make sure to refresh your **Upcoming** list on the Cymbus app to receive the most up-to-date information from the host.

1. Open the Cymbus desktop app, go to  **Meetings** and select the meeting you want to export.
2. In the right pane, select  **More > Export .ics file**. The .ics file is saved on your desktop computer.
3. Open the calendar application of your choice, and import the saved .ics file.

To export multiple meetings (not a series), repeat the steps above for each meeting.

## Host Controls for Meetings

During a meeting, the host can:

- Approve or deny an entry of each participant when a waiting room is enabled.
- Mute all participants (except for the host themselves).
- Mute a particular participant. The participant will be notified that they have been muted. They can un-mute themselves anytime; however the host cannot un-mute them.
- Remove a participant. The removed participant will be blocked from joining again to the current session from the same device. If you removed someone by mistake, tell them to

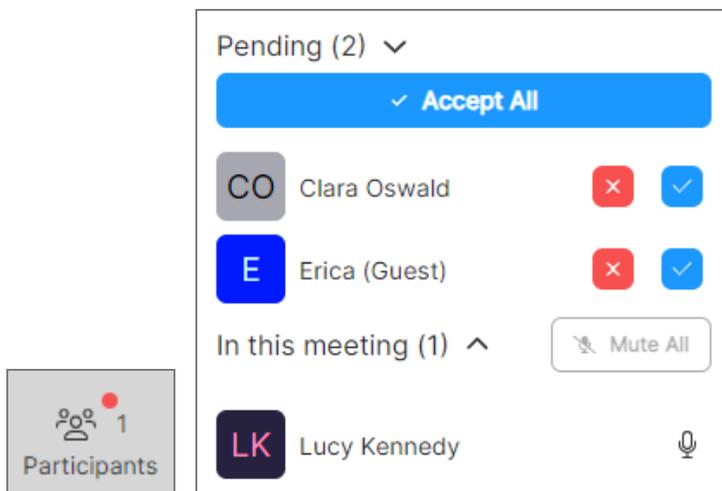
join from a different device, or you can end the current session and have everyone join again to your meeting.

- [Start recording](#) the meeting (desktop only)
- End the meeting for all participants.

## Waiting Room – Approve or Deny Participants Entry

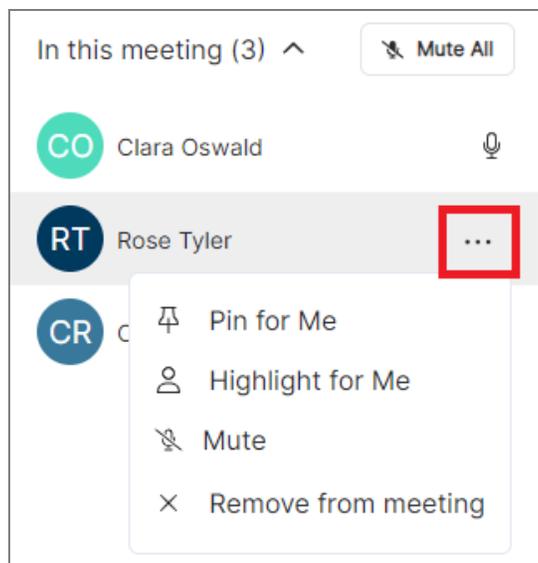
When a waiting room is enabled for a meeting, no one can join the meeting until the host approves the entry of each participant.

You, as the host, will not be notified that someone is waiting until *you* join the meeting. Once you join, you will see a red dot on the **Participants** button in the meeting toolbar. Open the Participants list, then select the check mark to allow the entry or the red **X** to deny the entry.



## Manage Participants

Select the **Participants** button in the meeting toolbar, then hover over the microphone icon for actions menu.



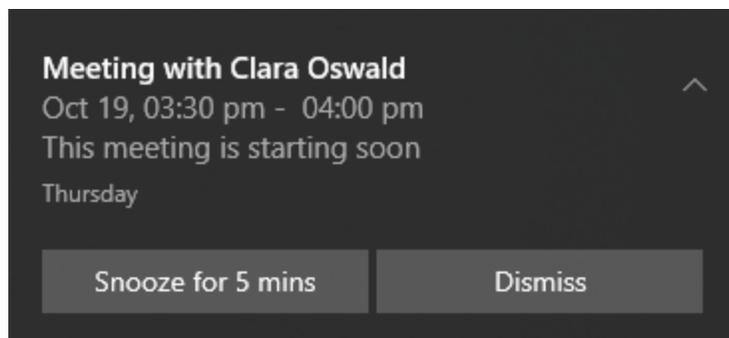
## Join a Meeting as a Cymbus User

When someone invites you to a meeting, you will receive a notification and see a meeting invite in the  **Meetings** tab under the **Upcoming** list. To refresh the **Upcoming** list to get the most up-to-date information, click  **Refresh** on the desktop app; on the mobile app, pull down on the **Upcoming** list.

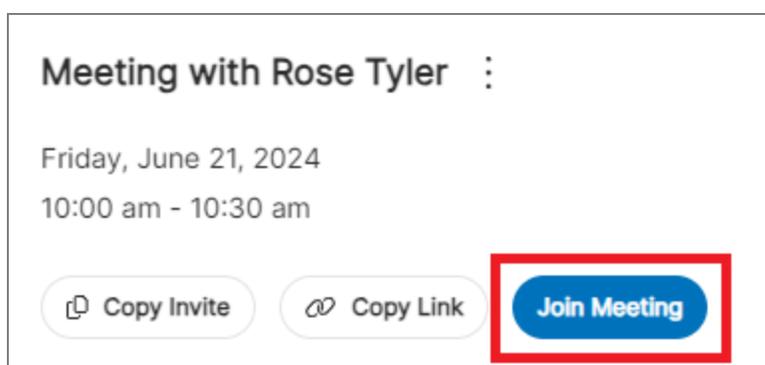
You can join a meeting in multiple ways: using meeting notifications, using the  **Meetings** tab, or using a meeting link. You can also join a meeting, by entering a meeting ID, [using a desktop browser](#), or [dialing in](#).

## Join Using a Meeting Notification

If you enable notifications for Cymbus, it sends you meeting notifications. Here is an example of a notification on Windows.



1. Select the notification to open the meeting details. Take note of the passcode if required by the host, and select **Join Meeting**.

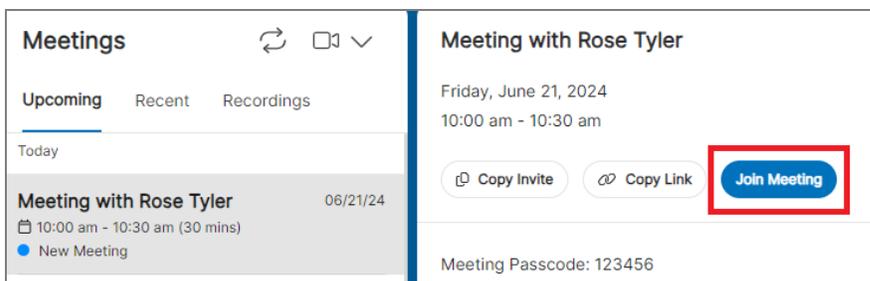


2. If prompted, enter the passcode, then select **Join Meeting** to proceed.
3. In the preview dialog, set your meeting preferences, such as mute, camera, and background effects.
4. When ready, select **Join Meeting**.

You are now in the meeting. See [Meeting Toolbar](#) for what you can do during a meeting.

## Join Using the Meetings Tab

1. When it's time for a meeting, go to  **Meetings**, and select the meeting you want to join.
2. In the meeting invite, take note of the passcode if required by the host, and select **Join Meeting**.

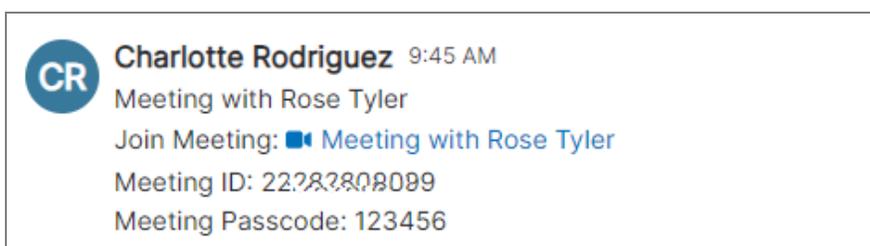


3. If prompted, enter the passcode, then select **Join Meeting** to proceed.
4. In the preview dialog, set your meeting preferences, such as mute, camera, and background effects.
5. When ready, select **Join Meeting**.

You are now in the meeting. See [Meeting Toolbar](#) for what you can do during a meeting.

## Join Using a Meeting Link

1. In the meeting invite, take note of the passcode. A passcode is included in the invite if enabled by the host.



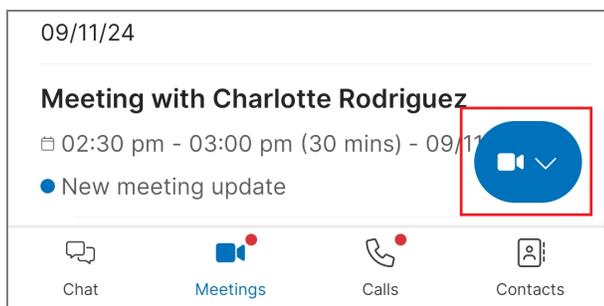
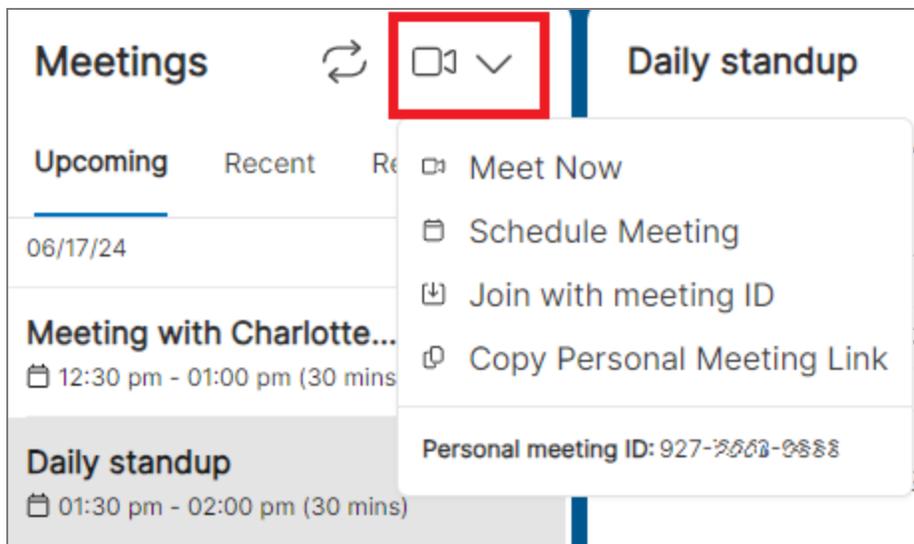
2. Select a meeting link in the invite.
3. If prompted, enter the passcode then select **Join Meeting** to proceed.
4. In the preview dialog, set your meeting preferences such as mute, camera, and background effects.
5. When ready, select **Join Meeting**.

You are now in the meeting. See [Meeting Toolbar](#) for what you can do during a meeting.

## Join Using a Meeting ID

You can join a meeting by typing a Meeting ID. A meeting ID can be found in the meeting invite. Also take note of the passcode in the invite if enabled by the host.

Go to the **Meetings** tab, then select **New Meeting > Join with meeting ID**. Then enter the meeting ID and select **Join**.



## Join a Meeting as a Guest

Anyone can join a Cymbus meeting, even if you are not a Cymbus user. Choose one or all of the following:

- Download the Cymbus app onto your computer or mobile phone
- [Use a web browser on your computer](#)

- [Dial into a meeting via PSTN](#)

You need a meeting link or a meeting ID. No login required!

When someone invites you to a Cymbus meeting, you receive a meeting invite outside of the Cymbus app, such as email. This invite contains a meeting link and an ID, and a passcode if the host requires it. You can join a meeting by clicking a meeting link, or entering a meeting ID. The Cymbus app needs access to your microphone and camera for a meeting. You will be able to test your microphone and camera before joining a meeting.

## Use the App and a Meeting Link

1. In the meeting invite, take note of the passcode. A passcode is included in the invite if enabled by the host.

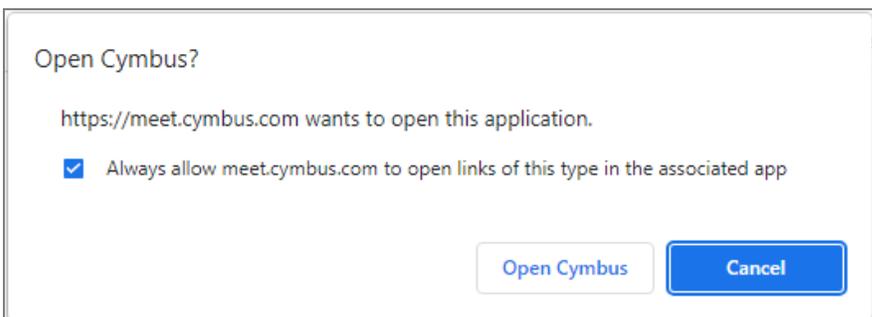


2. Click a meeting link in the invite. A web page opens in your default browser.



3. Download and install the Cymbus app to your device.

4. Go back to your browser. On the Welcome to Cymbus page, select **Launch Meeting**. A pop-up appears asking if you want to open Cymbus.

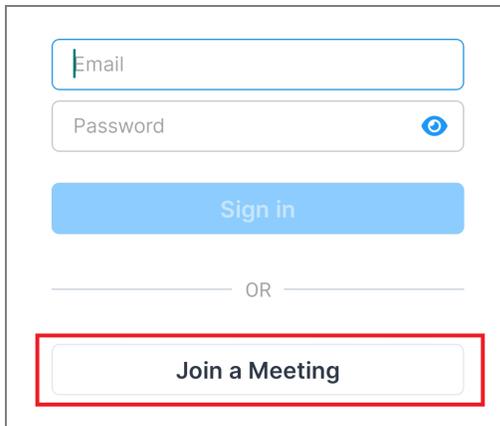


5. Select **Open Cymbus**. The app launches with a meeting ID populated.
6. Enter your display name for the host and other participants to see. Enable **Remember me on this device** to save your display name and audio/video preferences for future meetings.
7. Select **Join a Meeting** to proceed.
8. If prompted, enter the passcode then select **Join Meeting** to proceed.
9. In the preview dialog, set your meeting preferences such as mute, camera, and background effects.
10. When ready, select **Join Meeting**.

You are now in the meeting. See [Meeting Toolbar](#) for what you can do during a meeting.

## Use the App and a Meeting ID

1. In the meeting invite, take note of the passcode. A passcode is included in the invite if enabled by the host.
2. Download and install the Cymbus app.
3. Launch the app, and select **Join a Meeting** on the login screen.



The screenshot shows a login interface with the following elements:

- An input field labeled "Email".
- An input field labeled "Password" with a blue eye icon for toggling visibility.
- A blue button labeled "Sign in".
- A horizontal line with "OR" in the center.
- A button labeled "Join a Meeting" which is highlighted with a red rectangular border.

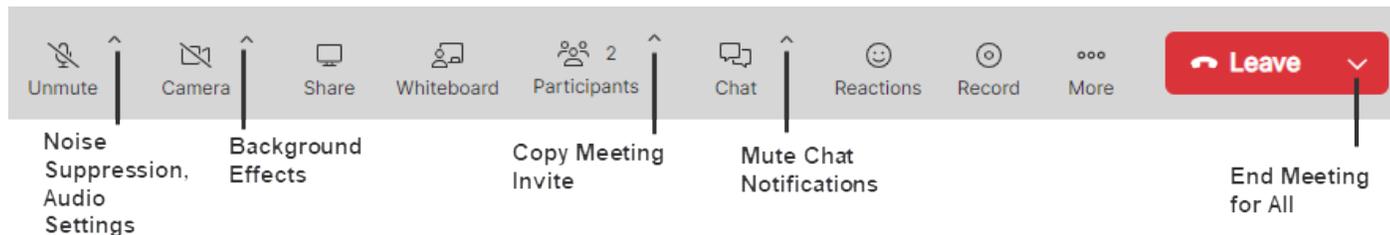
4. Enter the meeting ID, and your display name for the host and other participants to see. Enable **Remember me on this device** to save your display name and audio/video preferences for future meetings.
5. Select **Join a Meeting** to proceed.
6. If prompted, enter the passcode, then select **Join a Meeting** to proceed.
7. In the preview dialog, set meeting preferences such as mute, camera, and background effects.
8. When ready, select **Join Meeting**.
9. If prompted, give the app a permission to access your microphone.

You are now in the meeting. Other participants will see your display name, followed by (Guest). See [Meeting Toolbar](#) for what you can do during a meeting.

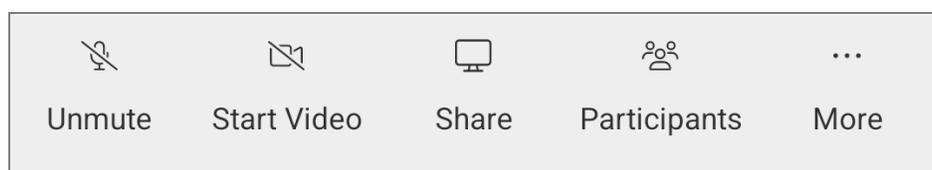
## Meeting toolbar

During a meeting, the meeting toolbar is at the bottom of your screen.

## Desktop



## Mobile



- **Mute.** Mute your voice, enable noise suppression, and change the microphone and speaker.
- **Camera.** Select the Camera icon to send or stop your video.
  - On the desktop app, click the arrow to choose a background or blur on the fly, or preview your own video feed before enabling camera.
  - On the mobile app, during a meeting you can switch to a blurred background but cannot switch to another background image, for example from forest to ocean.
- **Share.** Share your screen. See [Share Your Screen](#).
- **Whiteboard.** Collaborate on a whiteboard session. See [Whiteboard \(Desktop\)](#).
- **Participants.** See who is in the meeting, plus host controls.
- **Chat.** Exchange messages with participants.
- **Reactions.** Share emoji reactions such as a thumbs up and heart. Other participants see the icon in your video tile for a few seconds.

- **Record.** Appears only for the meeting host using the desktop app. See [Record a Meeting \(Desktop\)](#).
- **Turn Off Incoming Video.** Stop receiving video of other participants when you have a limited cellular data plan or when you are on an unstable network connection. Turning off incoming video conserves battery life and data consumption. In the meeting toolbar, select **More** then enable **Turn Off Incoming Video**.

## Incoming Calls during a Meeting

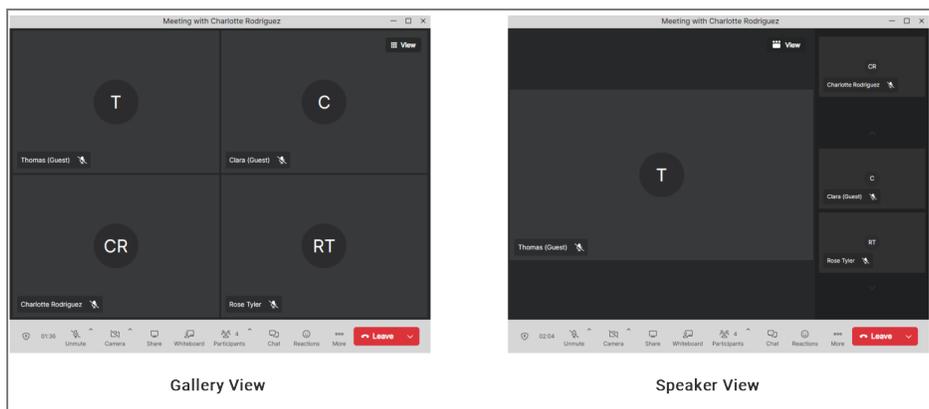
Incoming calls won't ring while you are attending a meeting. However, on your mobile phone, you might receive a *native* call during a meeting. To answer a native call, you must first leave the meeting, and then re-join after the call ends.

## Switching Devices during a Meeting

It's easy to change devices without leaving a meeting. For example, you started a meeting in the office on your laptop, but you need to leave. Join the ongoing meeting from your phone, then you can transfer the live meeting to your phone with one click.

## Layout of your Meeting Screen

Desktop participants can change layout of video feed between Gallery and Speaker. On the mobile app, the video feed is always displayed in grid.



- The Gallery view shows tiles of equal size in grid.
- The Speaker view shows one big tile along with a carousel of small tiles at the top or on the right. The big tile displays screenshare, or each user can choose a participant to show in the big tile by using the **Highlight for Me** menu.

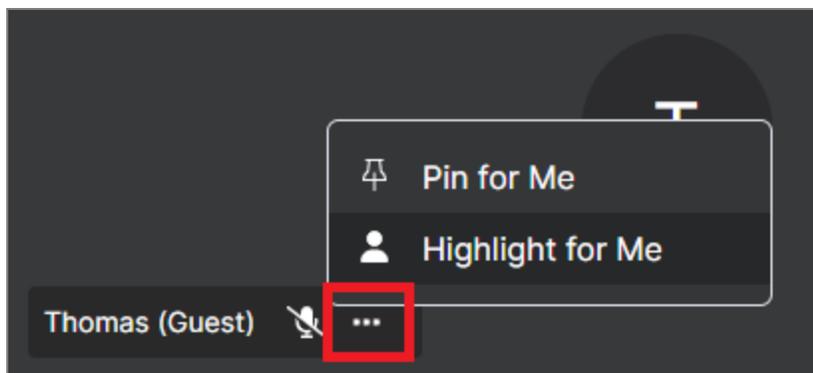
To change layout, select **View** in the top right corner, and select the style. This does not affect what other participants see.

## Self View

- **Hide Self View.** If you don't want to look at yourself during a meeting, select **View > Hide Self View**.

## Pin or Highlight

Choose a participant to show in your meeting screen. To pin or highlight a participant, hover over the person's tile to reveal the **⋮** three dots icon, then select the action you want. This does not affect what other participants see.



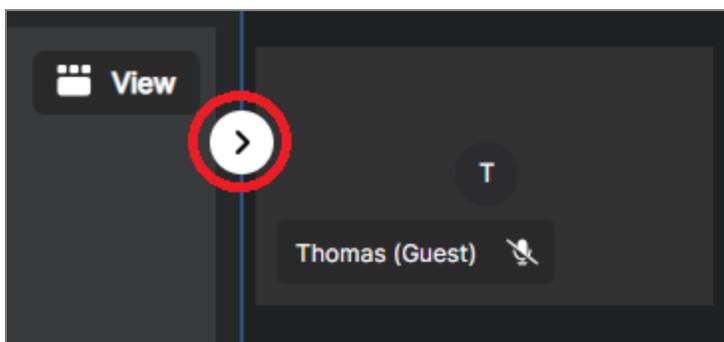
- **Pin for Me.** Pinned person appears in the first tile in the Gallery view on the top left corner. In the Speaker view, pinned participant appears in the second small tile of the carousel, with the first small tile being the presenter sharing their screen. Only one participant can be pinned at a time.
- **Highlight for Me.** Highlighted person appears in the big tile of the Speaker view and the shared screen moves to the first small tile in the carousel. You can also double click on a

participant tile to highlight instead of selecting the menu. To display the shared screen in the big tile again, double click on the screenshare tile in the carousel, or hover over the participant in the big tile then select **⋮** > **Remove Highlight**.

## Carousel in the Speaker View

In the Speaker view, each participant has choices to hide or move the carousel of small video tiles as well as the self view tile.

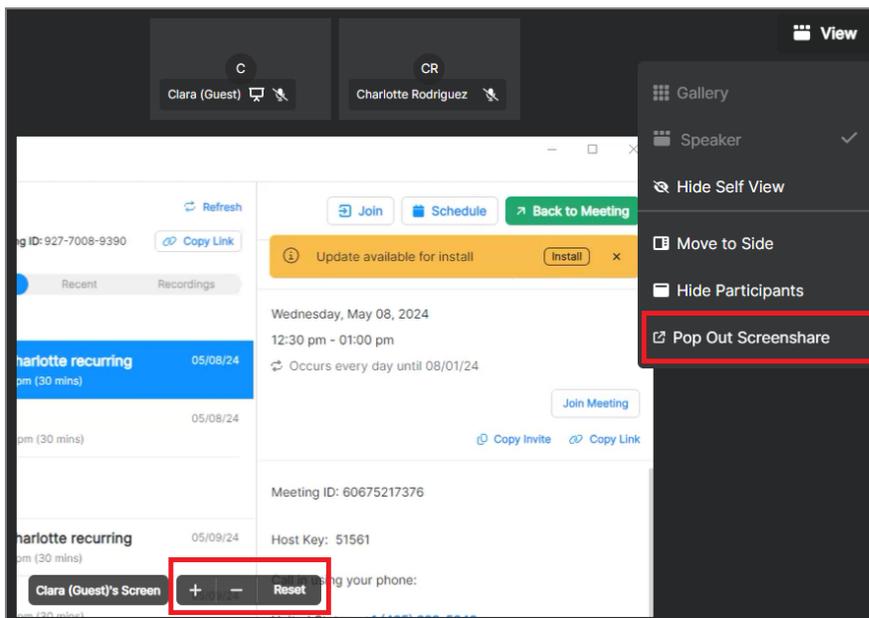
- Move the carousel and the self view to the right side instead of at the top. Select **View** > **Move to Side**.
- Move your self view tile to a corner of the meeting screen. If the carousel is horizontally displayed, the self view tile can be placed in either top left or top right corner. If the carousel is vertically displayed, the self view can be at the top or bottom of the right side. To move the self view, select the **⋮** three dots icon on the self view tile, and then select **Move to Right/Left Side** or **Move to Top/Bottom**.
- Hide the carousel and the self view completely. Select **View** > **Hide Participants**, or hover over the carousel area and click the arrow to hide it. To show it again, select **View** > **Show Participants**.



## Shared Screen

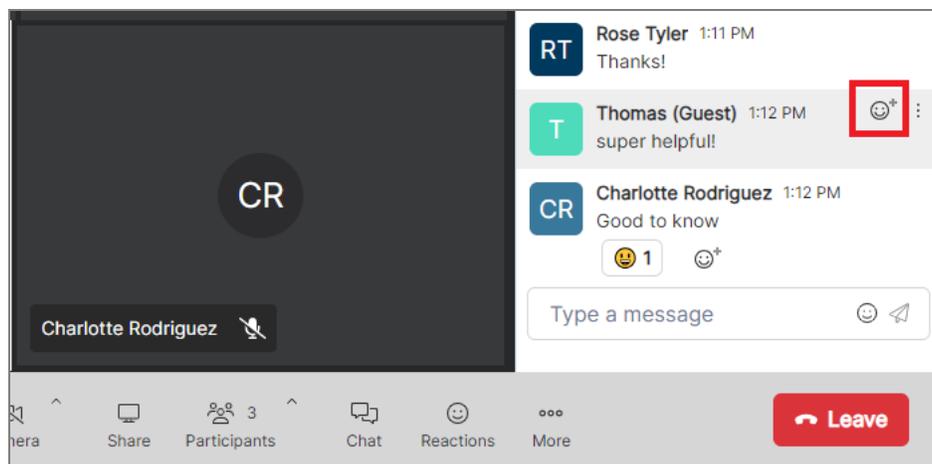
When someone starts sharing their screen, your meeting screen switches to the Speaker view, and the big tile shows the shared screen. Zoom in on the shared screen if it's too small. Desktop participants can pop out the shared screen into a separate window.

- To zoom in/out on the desktop app, use a mouse/trackpad, or use the on-screen +/-/Reset buttons next to the presenter's name.
- To zoom in/out on the mobile app, use two fingers to pinch the screen apart. Drag your finger to move it around. Double tap the screen to reset the view.
- To move the shared screen into a separate window, select **View > Pop Out Screenshare**. On the pop-up window, you can zoom in/out and reset. To move back, either close the pop-up window, or select **View > Restore Screenshare**.

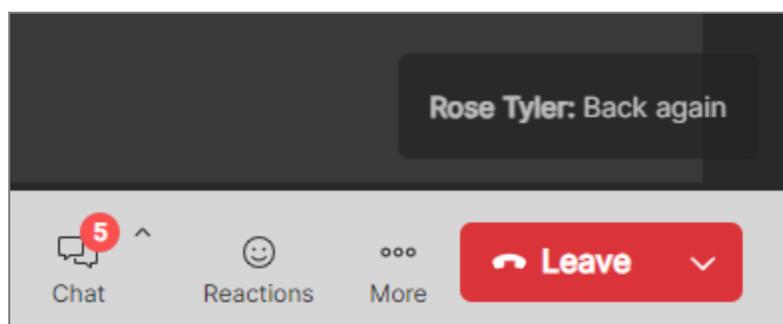


## Chat

During a meeting, you can send messages to all the participants and add emoji reactions to messages. All chat messages will be visible to participants even when they join late. However, the chat messages will not be available after the meeting ends. The chat history cannot be exported, but participants can copy each message during a meeting.



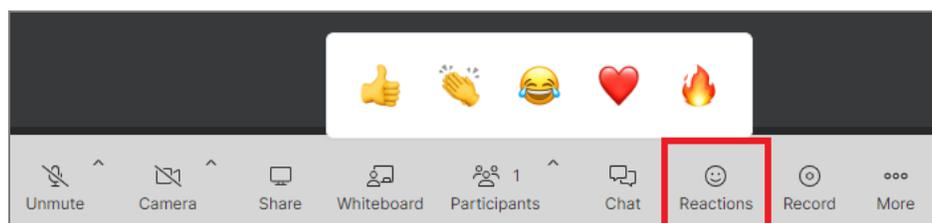
**Notification.** You will see a red dot on the **Chat** button for new messages. On the desktop app and web browsers, new messages pop up on the bottom right corner of the meeting screen. They disappear after a few seconds, but you can mute them completely by clicking the arrow beside the **Chat** button.



## Reactions

Engage in a meeting using emoji reactions such as thumbs up and heart. Other participants see the icon in your video tile for a few seconds.

On the desktop app, click **Reactions** in the meeting toolbar. On the mobile app, tap **More > Reactions**.



Meeting reactions appear in both the Gallery and Speaker layouts; however, they are not included in recordings.

## Screenshare During a Meeting

Anyone can share their screen during a meeting. To start screen share, select **Share** on the meeting toolbar. On the desktop app, you can choose to share either a screen or an application. On the mobile app, you share your whole screen. Enabling Do Not Disturb on your phone is recommended to prevent unexpected notifications.

### Zoom In on Shared Screen

Looking at a screen that's too small? You can zoom in.

- On the desktop app, use the **+/-/Reset** buttons next to the presenter's name in the bottom left of the screen. Alternatively, desktop users can use a mouse or trackpad to zoom in and out.
- On the mobile app, use two fingers to pinch the screen apart, drag your finger to move it around, and double tap the screen to reset the view.

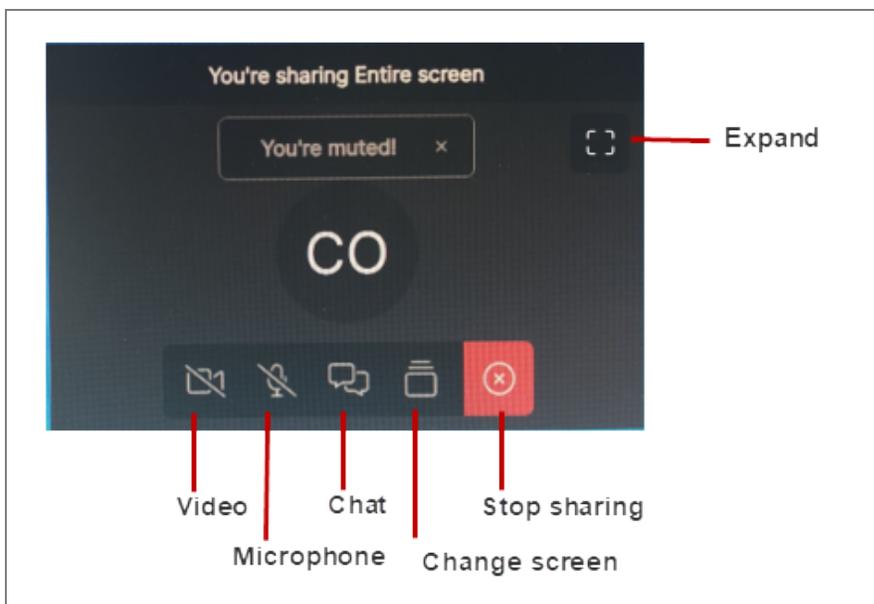
## Desktop (Windows and Mac)

To start sharing:

1. Select **Share** in the meeting toolbar.

On Mac, if this is your first time to share screen on this device, the Cymbus app asks for a permission to allow your screen to be shared. Select **Open System Preferences** to grant the **Screen Recording** permission. The dialog says your screen will be *recorded*; however, for Cymbus meetings, your screen will be only shared to other participants, and it will not be recorded.

2. Double-click a screen or application to share. The meeting toolbar shrinks to a pop-up. The shared screen or application has a red highlighted border around it. The header in the pop-up also indicates which screen or application you are sharing.



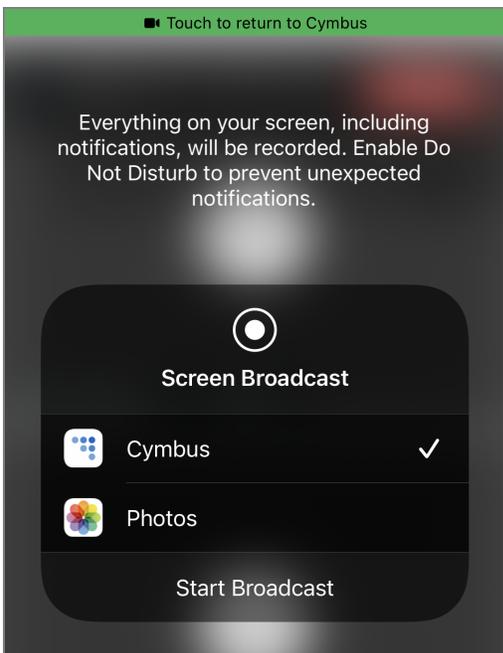
To stop sharing:

1. Select the red **Stop sharing** button in the pop-up or select **Stop Share** in the meeting toolbar.

## iOS

To start sharing:

1. Select **Share** in the meeting toolbar. The Screen Broadcast screen opens.
2. Select the Cymbus app in the list and tap **Start Broadcast**.

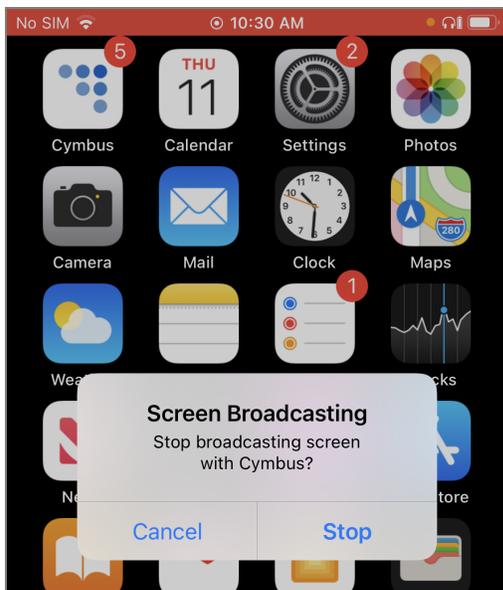


The dialog says your screen will be *recorded*; however, for Cymbus meetings, your screen will be only shared to other participants, and it will not be recorded.

3. Use your phone to present what you want to screen share.

To stop sharing:

1. Tap on the red bar at the top of the screen. A message pops up to stop broadcasting with Cymbus.

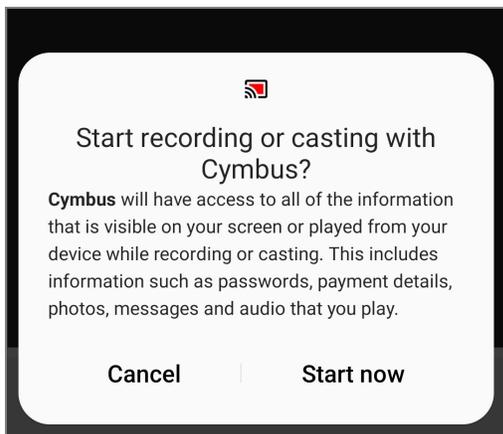


2. Tap Stop.

## Android

To start sharing:

1. Select **Share** in the meeting toolbar. The message appears asking to start recording or casting with Cybus.



2. Select **Start now**.
3. Use your phone to present what you want to screen share.

To stop sharing:

1. Go back to the Cymbus app.
2. Tap **Stop Share** in the meeting toolbar.

## Whiteboard (Desktop)

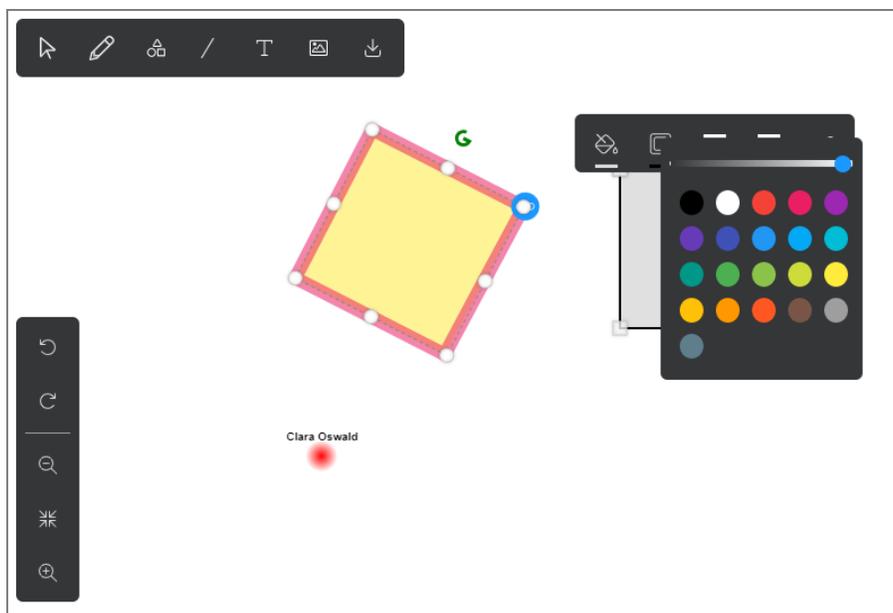
Whiteboard allows users to draw on the video screen for real-time collaboration during a meeting. Draw shapes, highlight a region, drag and drop images, snap to grid, and more. Desktop participants can start a whiteboard session with other participants and then download the results (PNG, PDF, or SVG) when they're done.

Mobile users can view but not participate in a whiteboard session. Other participants can collaborate in a whiteboard session as long as they use the desktop app.

Whiteboard is available in meetings with 50 or fewer participants. Any desktop participants can start a whiteboard. Screenshare is not available during a whiteboard session, so end a whiteboard session before sharing your screen.

### Start a Whiteboard Session

Select **Whiteboard** in the meeting toolbar to start a whiteboard session. If someone already started it, you can join by adding a component. On the whiteboard, you will see your cursor with your name.

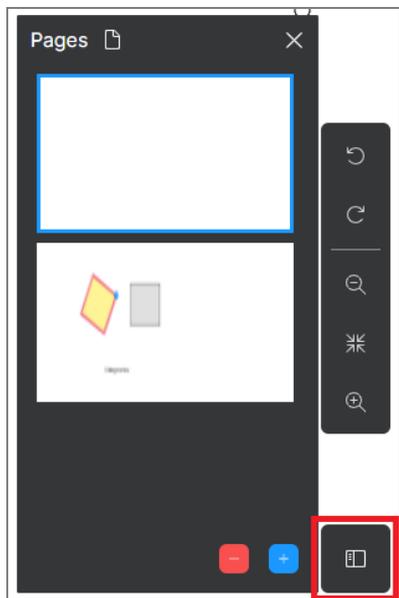


## Add Components

Use the top toolbar to add shapes, lines, texts, images and links (URLs). To delete an object, select the object and press the Delete key. The side tool bar has Undo and Redo options, as well as zoom in and out.

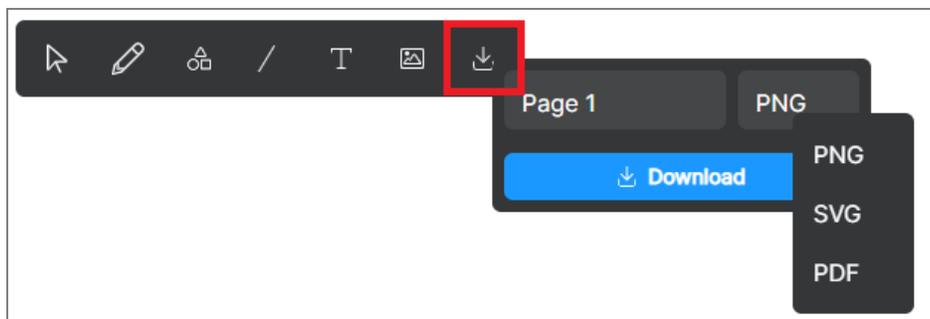
## Add Pages

To add a page, click the Panel button at the bottom left corner, then use the blue checkmark button to add a page. The red button deletes the selected page.



## Save

Download before ending a whiteboard session. In the top toolbar, click **Download** and choose the format.



## End a Whiteboard Session

Before ending the session, let the other desktop participants save the whiteboard to their computers. Mobile participants have no options to download.

To end a whiteboard session, select **End Whiteboard** in the meeting toolbar. Only the host and the participant who started the whiteboard session will see a pop-up with an option to download the whiteboard before the session ends. When you confirm in the pop-up, the session ends for everyone.

# Record a Meeting (Desktop)

Hosts can record their meetings using the desktop app. Meetings cannot be recorded via the mobile app, PTSN, or a browser. Recordings are stored in MP4 format and can be downloaded by the host within 21 days.

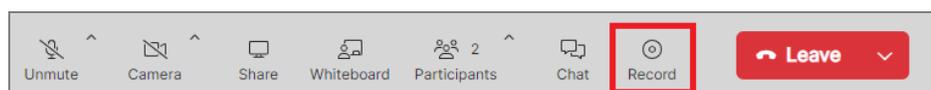
## What's Recorded?

The meeting recording captures audio, participant videos, screen share and whiteboard. It does not include the chat messages or a list of participants. Additionally the video does not show the participant's name, meeting reactions, or the indication of the current speaker (no highlighted tile, for example).

## Start Recording

Any meeting, including scheduled and *Meet Now* ad-hoc, can be recorded as long as the host uses the desktop app.

To start recording, click the **Record** icon in the meeting toolbar. Participants will hear a voice prompt saying recording is in progress. They will also see the Recording icon in their meeting toolbar.



- How do I pause recording?

A meeting recording cannot be paused, but the host can start and stop recording as needed. Separate files will be made available in the **Recordings** list.

- Can I leave early but continue recording the rest of the meeting?

Yes. If the host starts recording and leaves the meeting early, recording continues until the meeting ends and/or everyone leaves the meeting. No one else can stop a recording.

- How do I delete a recording?

You cannot delete a recording, but no one else but you (the host) can access it. The recording will be automatically deleted from the app after the expiry.

## Download Recordings

After a recording is stopped, the host can download it to their computer using the desktop app. Recordings expire in 21 days and are automatically deleted from the app. No reminder is sent when the recording is about to expire, so make sure to download your recordings after each meeting.

1. You'll receive a notification and see a badge on the **Recordings** list of the  **Meetings** tab when a recording is ready.



2. Go to the **Recordings** list and select a meeting to download. Use the Search field to filter the list by meeting titles. Enter at least five (5) characters to start a search.
3. Click **Download Video**. The file is downloaded in your default browser's Downloads folder.
4. Use your media player to watch the recording, or save the file in a shared repository for others to watch.

## Join a Meeting Using a Browser

Anyone, both Cymbus users and guest users, can use a web browser to access Cymbus meetings on the desktop computer. Joining using a browser on mobile phones is not supported.

Supported web browsers are Google Chrome, Safari and Microsoft Edge.

Users with a browser will have access to everything except participating or downloading a whiteboard session. Users with a browser can only view a whiteboard session.

### No host control for browser

If you are a meeting host, it is recommended to use the Cymbus app instead of a browser. There is no host control for browser access; meaning you won't be able to perform host tasks such as muting other participants.

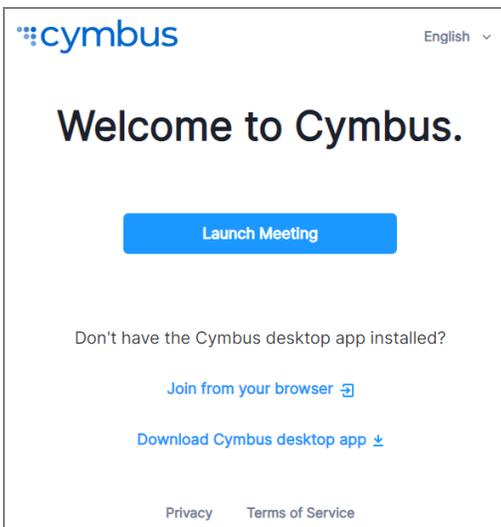
## Join Using a Browser

Users need to provide a permission via browser to access their microphone, speaker, and camera.

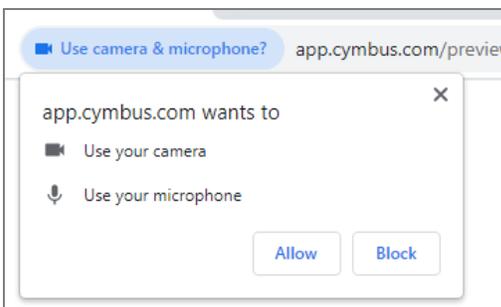
1. In the meeting invite, take note of the passcode. A passcode is included in the invite if enabled by the host.

1:1 Clara with Lucy  
Join Meeting: <https://meet.cymbus.com/j?MID=4185210137>  
Meeting ID: 4185210137  
Meeting Passcode: 123456

2. Click a meeting link in the invite. If you only have a meeting ID, go to <https://meet.cymbus.com/>.
3. Click **Cancel** when the browser displays a pop-up asking if you want to open URL:Cymbus.
4. On the Welcome to Cymbus page, click **Join from your browser**.



5. Enter your display name for the host and other participants to see. If preferred, enable **Remember me on this device** to save your display name and audio/video preferences for future meetings.
6. Click **Join Meeting** to proceed.
7. If prompted, enter the passcode, then click **Join a Meeting** to proceed.
8. Click **Allow** to give the browser a permission to access your camera and microphone.



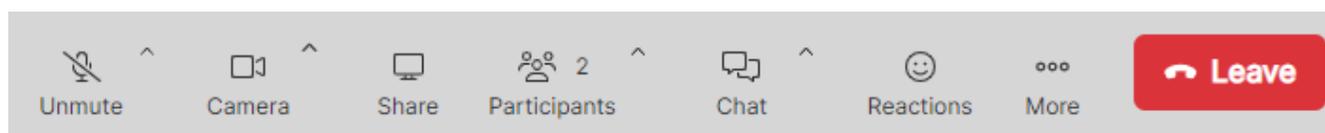
9. In the preview dialog, set meeting preferences such as mute, camera, and background effects.
10. When ready, select **Join Meeting**.

You are in the meeting.

Once you are in the meeting, **do not refresh** your browser; you will get kicked out of the meeting and the Welcome to Cymbus page opens again in the browser.

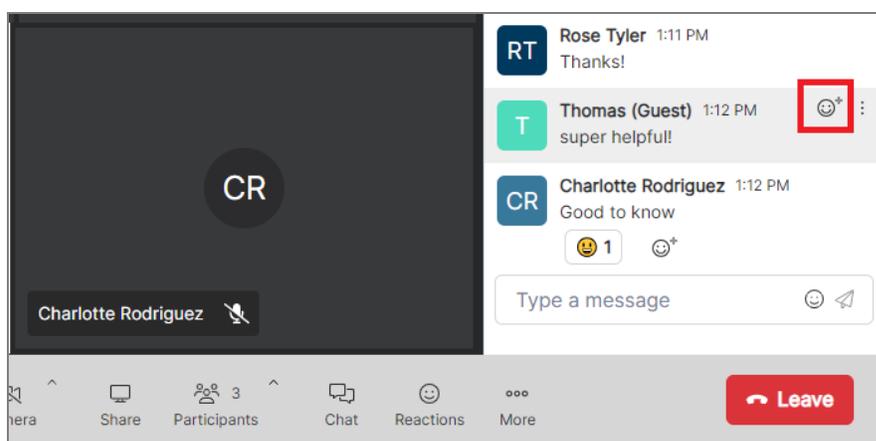
## Browser Meeting Toolbar

Once you are in the meeting, you will see the meeting toolbar with these buttons at the bottom of your browser:



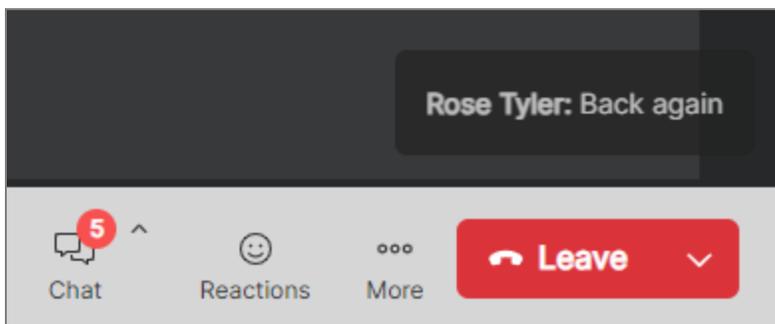
- **Camera.** Click the arrow beside the Camera icon to choose a background or add blur during a meeting.
- **Chat.**

During a meeting, you can send messages to all the participants and add emoji reactions to messages. All chat messages will be visible to participants even when they join late. However, the chat messages will not be available after the meeting ends. The chat history cannot be exported, but participants can copy each message during a meeting.



**Notification.** You will see a red dot on the **Chat** button for new messages. On the desktop app and web browsers, new messages pop up on the bottom right corner of the meeting

screen. They disappear after a few seconds, but you can mute them completely by clicking the arrow beside the **Chat** button.



- **Reactions.** Engage in a meeting using emoji reactions such as thumbs up and heart. Other participants see the icon in your video tile for a few seconds. Meeting reactions appear in both the Gallery and Speaker layouts; however they are not included in recordings.
- **More > Turn Off Incoming Video.** Stop receiving video of other participants when you have a limited cellular data plan or when you are on an unstable network connection. Turning off incoming video reduces the bandwidth consumed for the meeting.

#### Zoom In on Shared Screen

Looking at a screen that's too small? You can zoom in. Use the **+/-/Reset** buttons next to the presenter's name in the bottom left of the screen. Alternatively, users can use a mouse or trackpad to zoom in and out.

## Layout of your Meeting Screen

The layout of video feed can be switched between Gallery and Speaker. Select **View** in the top right corner, and select the style. This does not affect what other participants see.

- The Gallery view shows tiles of equal size in grid.
- The Speaker view shows one big tile along with a carousel of small tiles at the top or on the

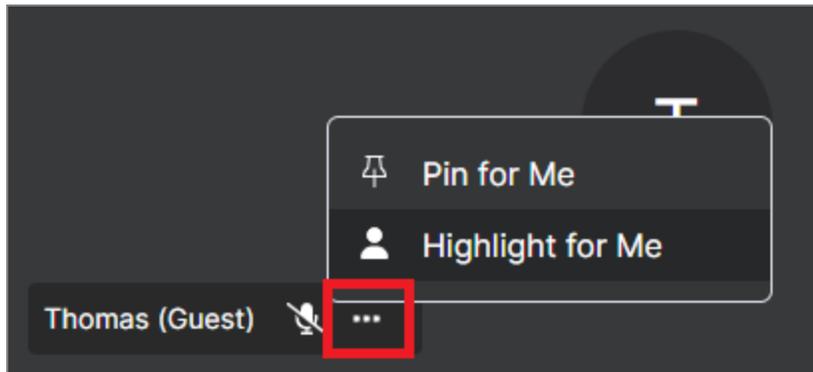
right. The big tile displays screenshare, or each user can choose a participant to show in the big tile by using the **Highlight for Me** menu.

## Self View

- **Hide Self View.** If you don't want to look at yourself during a meeting, select **View > Hide Self View**.

## Pin or Highlight

Choose a participant to show in your meeting screen. To pin or highlight a participant, hover over the person's tile to reveal the **⋮** three dots icon, then select the action you want. This does not affect what other participants see.

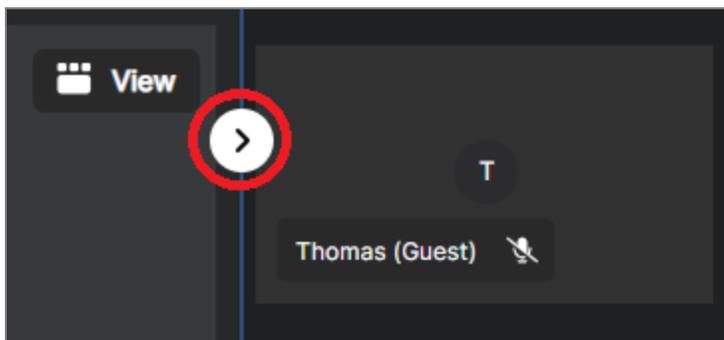


- **Pin for Me.** Pinned person appears in the first tile in the Gallery view on the top left corner. In the Speaker view, pinned participant appears in the second small tile of the carousel, with the first small tile being the presenter sharing their screen. Only one participant can be pinned at a time.
- **Highlight for Me.** Highlighted person appears in the big tile of the Speaker view and the shared screen moves to the first small tile in the carousel. You can also double click on a participant tile to highlight instead of selecting the menu. To display the shared screen in the big tile again, double click on the screenshare tile in the carousel, or hover over the participant in the big tile then select **⋮ > Remove Highlight**.

## Carousel in the Speaker View

In the Speaker view, each participant has choices to hide or move the carousel of small video tiles as well as the self view tile.

- Move the carousel and the self view to the right side instead of at the top. Select **View > Move to Side**.
- Move your self view tile to a corner of the meeting screen. If the carousel is horizontally displayed, the self view tile can be placed in either top left or top right corner. If the carousel is vertically displayed, the self view can be at the top or bottom of the right side. To move the self view, select the **⋮** three dots icon on the self view tile, and then select **Move to Right/Left Side** or **Move to Top/Bottom**.
- Hide the carousel and the self view completely. Select **View > Hide Participants**, or hover over the carousel area and click the arrow to hide it. To show it again, select **View > Show Participants**.



## Share Your Screen Using a Browser

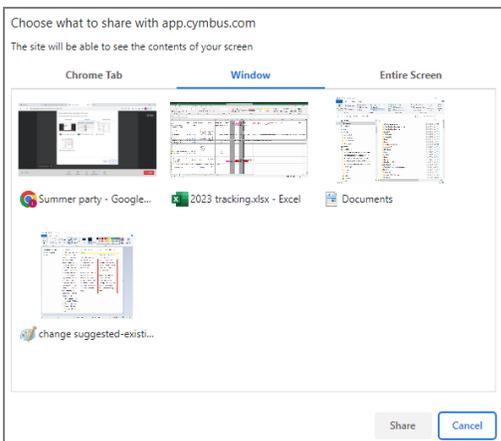
You can share your whole screen, a browser tab, or a window of a specific application running on your computer.

On Mac, you must give your browser the permission to share your screen. It is recommended to do so *before* you join a meeting because when you are using a browser, you need to leave the meeting in order to give the **Screen Recording** permission, then join back to the meeting to start screenshare. To give the browser a permission, go to Mac System Preferences and select **Security & Privacy**. Select **Screen Recording** on the left, and select the browser to give the

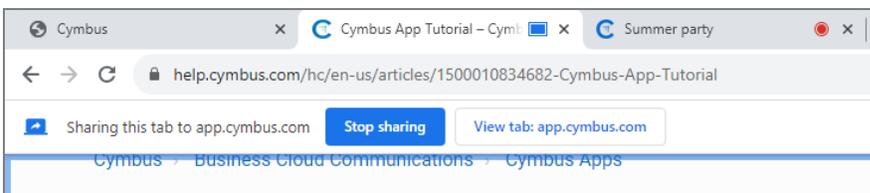
permission. The dialog says your screen will be *recorded*; however, for Cymbus meetings, your screen will be only shared to other participants, and it will not be recorded.

To start screenshare using a browser:

1. Select **Share** in the meeting toolbar.
2. Choose a browser tab, a window of a specific application, or an entire screen to share.



3. Select **Share**. The shared window or screen displays a yellow border around it. When sharing a browser tab, the browser indicates which tab is being shared.



When sharing a window or screen, a small pop-up appears at the bottom of your screen.



To stop sharing:

1. Select **Stop Share** in the meeting toolbar or select **Stop sharing** in the pop-up.

## Join a Meeting via PSTN

You can dial into a Cymbus meeting using PSTN. With this method, you use a phone to listen and speak during the meeting. No video or screenshare available. Other members only see your phone number, not your name. A part of your phone number will be displayed with \* to protect your privacy.

You can join the same meeting concurrently using the Cymbus app, PSTN, and a desktop browser. Let's say you are driving and stuck in a traffic. You can dial into a meeting using PSTN, then later join the same meeting using the Cymbus app when you get to the office. This way, you won't miss any part of the meeting.

### Join as a Participant or a Guest

1. On the meeting invite, locate the following. If your meeting invite does not list a dial-in number, dial-in is not available for this meeting.
  - A Meeting ID,
  - A dial-in phone number for your area, and
  - A passcode if required by the host.
2. Use your native dialer on a mobile phone to call the dial-in number for your area.
3. Follow the audio prompt to enter the meeting ID, followed by #.
4. If asked, enter \* followed by #.
5. Enter the 6-digit passcode if enabled by the host. You will be either allowed in the meeting or placed in a waiting room.

You are muted when you enter the meeting. Dial the star code **\*6** to unmute and speak. After dialing the star code to unmute yourself, you can use the mute icon on your native dialer to control your mute status. However, if you later hear "You have been muted," you must dial the star code again to unmute yourself. In this case, tapping on the mute icon on

native dialer does not unmute because you have been muted by the host.

## Join as a Meeting Host

To join a meeting via PSTN as a host, you need a host key.

A 5-digit host key is visible only in the meeting invite sent to the host. When you click **Copy Invite**, the host key is excluded for a security reason. If you are copying the invite for yourself, manually add the host key.

If a wrong host key is entered for a few times, you will join the meeting as a participant. In this case, you are required to enter the passcode if you enabled it for this meeting.

1. In the Cymbus app, go to  **Meetings**, and select the meeting you want to join, and locate the following in the invite. If your meeting invite does not list a dial-in number, dial-in is not available for this meeting.
  - A Meeting ID,
  - A phone number for your area, and
  - A host key.
2. Use your native dialer on a mobile phone to call the dial-in number for your area.
3. Follow the audio prompt to enter the meeting ID, followed by #.
4. Enter the 5-digit host key followed by #.

You are muted when you enter the meeting. Once you are in the meeting, you can dial star codes for these actions.

- **\*6** to unmute yourself. After that, you can use the mute icon on your native dialer to control your mute status.
- **\*7** to end a meeting for all (available to the host only)

If a waiting room is enabled for a meeting, all participants automatically enter the meeting once you join using PSTN with the host key. Note that you have no ability to control mute statuses of other participants or remove participants.

# URL Launch On Calls (Desktop)

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If you make many phone calls and also use a customer relationship management (CRM) system, this web URL launch feature helps you work more efficiently. Instead of manually navigating CRM every time you have a call, the Cymbus app can open the page you want in your default browser, such as adding a new contact, or searching for a contact in your CRM.

When you place or receive a call from a phone number with 7 or more digits, the app opens the pre-configured URL of your choice in your default browser. For incoming calls, the URL opens when the call is established. For outgoing calls, the URL opens when a number is dialed (before the call is answered).

This feature is available only on the desktop apps, and works with the CRMs that support URL-based commands, such as HubSpot and Zendesk. Before a call occurs, you must first log in to your CRM using your default browser. Otherwise, you will see the CRM login screen instead of the URL you configured.

## Step 1: Configure a URL to Launch

The first step is to decide on what to launch. Log in to your CRM and navigate to the exact page you want to launch when a Cymbus call occurs. A useful page to launch could be searching your contact list, or creating a new contact in your CRM. Copy the URL to a text editor. This URL typically includes a question mark (?) as well as some parameters. Use this URL as your base, and optionally add some variables for a tighter integration.

Variables are special placeholders that can be used in the launch URL. The Cymbus app replaces variables with real information when launching the URL. Supported variables are:

- {phoneNumber} – the phone number of the outgoing/incoming call.
- {firstName} – The first name of your Cymbus contacts. If the phone number is not in your Cymbus contacts, this variable will be replaced with an empty string.

- {lastName} – The last name of your Cymbus contacts. If the phone number is not in your Cymbus contacts, this variable will be replaced with an empty string.

### Want to know more about variables?

Let's say you want to look up a phone number of an incoming call. Set this URL in your Cymbus Desktop app under the Inbound calls section. Note this URL has three variables.

```
https://www.google.com/search?q={phoneNumber}+{firstName}+{lastName}
```

When you receive a call, variables are replaced with the call information, and a Google page opens with search results for the incoming phone number. Contact names will be appended if the phone number is already saved in your Cymbus contacts. With this example, when you receive a call from Clara, the app opens the following URL in the browser.

```
https://www.google.com/search?q=7785553580+Clara+Oswald
```

The URL and parameters vary depending on your CRM platform, so talk with the CRM admin in your organization or your CRM provider if you need any assistance. The URL must be maximum 300 characters. Here are some examples to get started.

## HubSpot

An example of searching a phone number in HubSpot contacts.

```
https://app.hubspot.com/contacts/<your-org-ID>/objects/0-1/views/all/list?query={phoneNumber}
```

Replace <your-org-ID> with the ID of your organization. Log into your HubSpot, and check the URL in browser to find out yours.

## Zendesk

An example of searching Zendesk tickets with the customer name. This example assumes the customer is saved in Cymbus as well as Zendesk using the same first and last name.

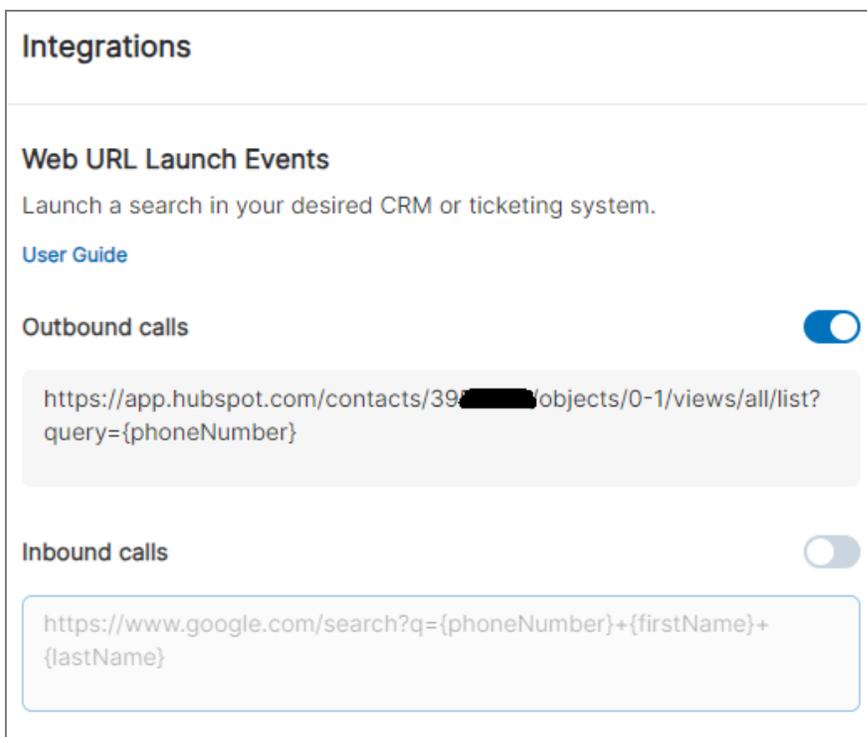
```
https://<your-subdomain>.zendesk.com/agent/search/1?q={firstName}%20{lastName}
```

Replace **<your-subdomain>** with the subdomain of your organization.

## Step 2: Enter the URL to the Cymbus App

Now you have the URLs to launch, perform the following steps to enter the URLs in the app. Note the integration settings will not sync across Cymbus devices. For example, if you use Windows and Mac, you need to configure the URLs on both.

1. Open the Cymbus desktop app, and click your initials > **Settings** > **Integrations**.
2. Enable an event to launch a URL, and enter a URL in the field. You can enable only one event or both.



To stop launching a URL, disable the event by clicking the toggle. The URL will remain saved in the app so it is easier to enable again in the future.

## Step 3: Log in to your CRM in Browser

Finally, ensure you are logged in to your CRM with your default browser so that the next time you receive or place a call in Cymbus, the URL you configured will open in the browser.



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