



# UC Apps User Guide

For Business Cloud Communications

February 2026

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# Welcome to the UC App

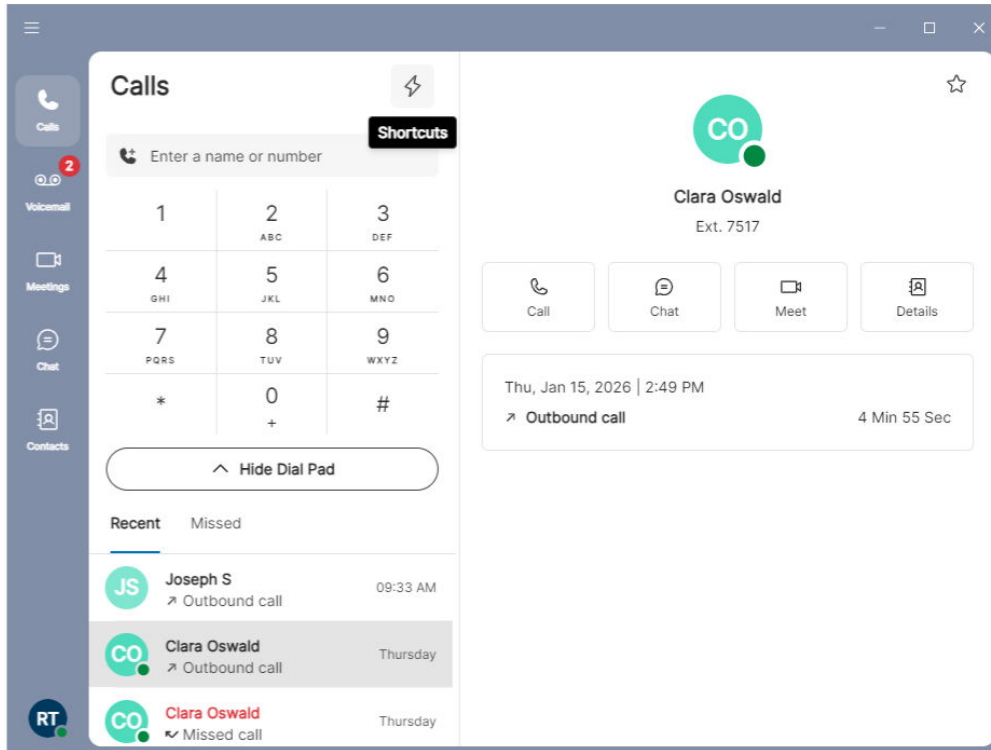
## Supercharge your voice and video collaboration experience

Our UC app has been completely redesigned and rebuilt from the ground up to provide a next-gen user experience with voice, video, personal and team messaging, visual voicemail, enhanced meetings, and much more.



## Superior Collaboration Tools

In today's fast-paced corporate world, teamwork is the key to success. Our UC app includes a number of new collaboration features which allow you to collaborate effortlessly regardless of your location. From real-time whiteboarding sessions and screen sharing across desktop and mobile, the expanded collaboration capabilities enable you to effortlessly connect, share, and innovate for a more productive and efficient work environment.



## System Requirements

UC apps are supported on the following OS and devices.

- Windows Windows 10, Windows 11. Only Pro and Enterprise versions are supported.
- Mac macOS 14 (Sonoma), macOS 15 (Sequoia), macOS 26 (Tahoe).
- iOS iPhones running iOS 17, iOS 18, or iOS 26. No iPad or iPod are supported.
- Android Certain Android phones\* running Android 14, 15, or 16. No tablets, Google Pixel Fold series, or Chromebooks™ are supported.
  - \* Samsung Galaxy S series and A series, as well as Google Pixel 5 and newer.



### 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.



### 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.

## Supported Headsets

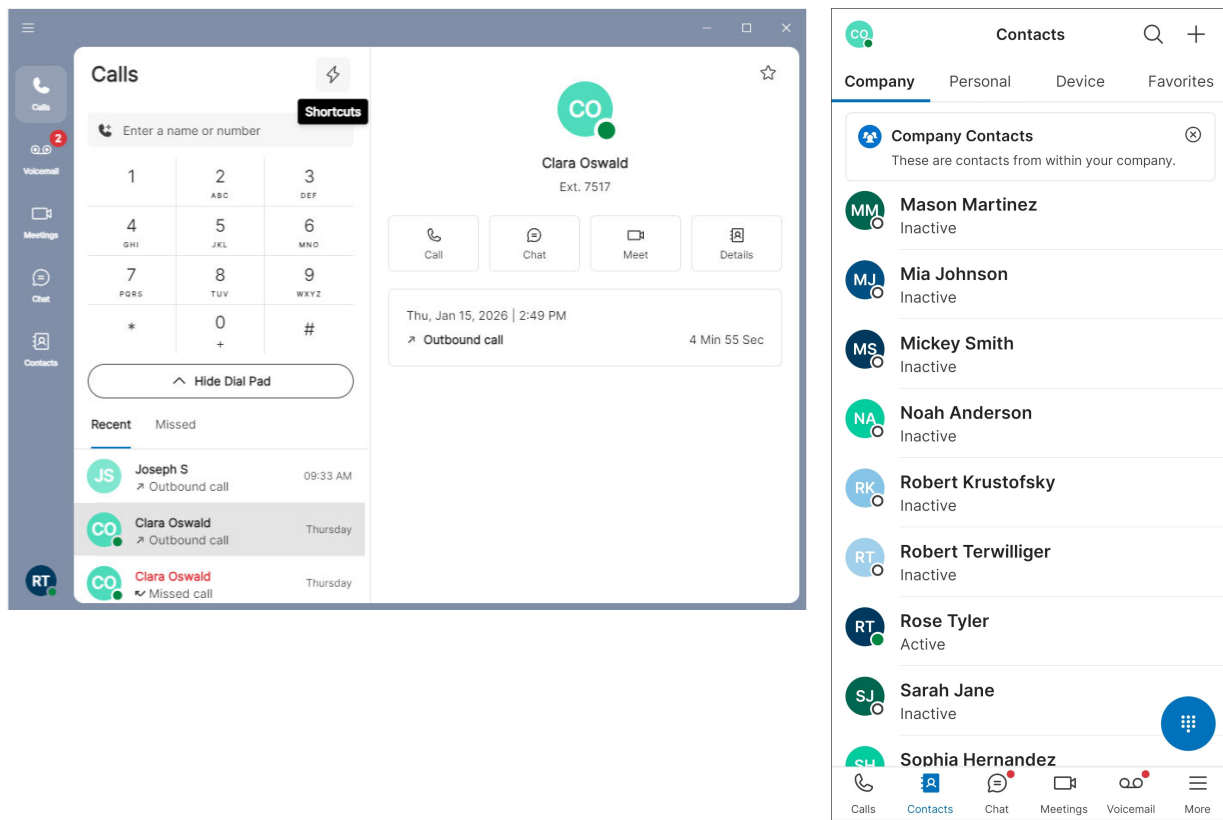
Various headsets can be used for Cymbus calls and meetings, including:

- Jabra Evolve
- Poly
- Apple AirPods (2nd generation and newer), AirPods Pro, AirPods Max

Integrated call control is supported using certain Jabra headsets. No additional software required, including Jabra Direct. See [Call Control using Headsets](#).






## Navigate the App

Use the app on up to 10 devices simultaneously and access the same information across all devices.



## Desktop

The navigation tabs appear on the left of the app screen on a desktop computer.

-  **Calls**. Place a call and view the history of calls made or missed on all devices connected to the BCC service. Access Dial Pad and [shortcuts](#) for frequently used phone numbers, star codes, and URLs.
-  **Voicemail**. Check voicemails and change your voicemail greeting.
-  **Meetings**. Start a meeting on your bridge, or schedule a new meeting.
-  **Chat**. Exchange messages with company contacts.
-  **Contacts**. Access company contacts and personal contacts you added to the app.
- **Your Initials**. Access **Settings**, set a custom status, and sign out of the app. Under **Settings**, switch between light and dark theme, test audio without making a call, and more.





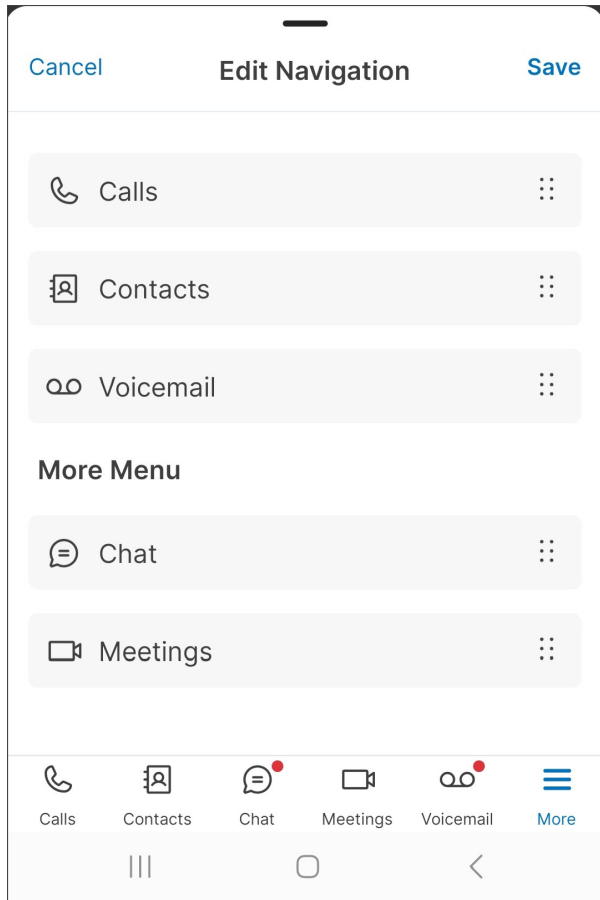
### Unread Notification Badge

A red dot on a navigation tab indicates a new missed call, message or voicemail. See [App Notifications](#) for details.

## Mobile

On a mobile device, the navigation tabs are located at the bottom of the screen, and your initials appear in the top left corner.

- The dial pad can be accessed from the  **Calls** or  **Contacts** tab.
- The navigation tabs can be reordered to match how you use the mobile app. For example, if you don't join meetings on mobile, move the **Meetings** tab under **More** and keep the main screen focused on calling. To change the tab order, tap **More > Reorder** and drag to the desired location.



### Keep Running in Background

We recommend keeping the app running in the background, so the app can continue to receive calls and messages as they come in. On a mobile device, the app uses your cellular data if it's not connected to Wi-Fi. To stop the app from running, select your initials, then tap **Sign out**.

## Language in the UC App

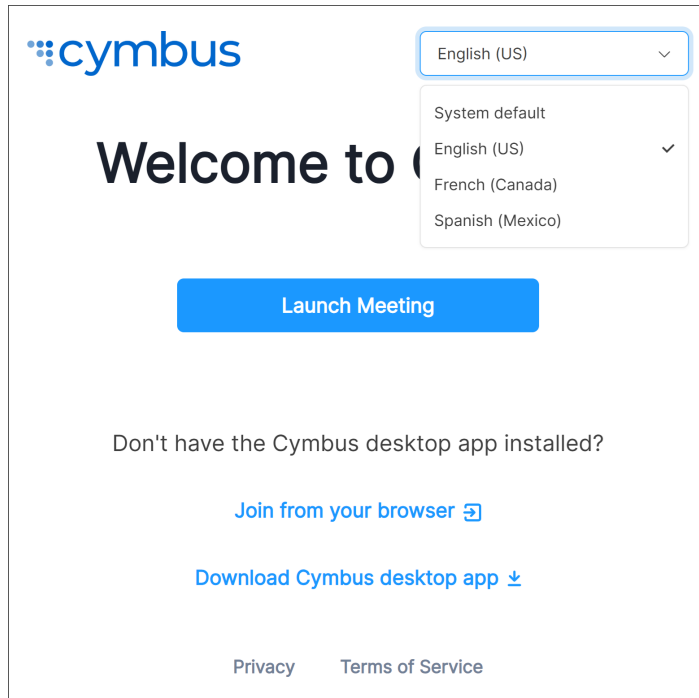
Experience the app in English, Canadian French, or Spanish. By default, the app uses the device's system language for app screens and meeting audio prompts. To change the app language, select your initials > **Settings** > **Language**.



### Voicemail Language

The app language does not apply to your voicemail box. To change your voicemail language setting, contact your account admin.

The Welcome to Cymbus Meeting page uses the browser's default language. To change the language, use the menu on the top right.



### Some elements are in English only, including:

- Desktop installers, which are the screens that an end user sees while installing the UC app on their computer.
- Meetings PSTN dial-in audio prompts, which are the audio that an end user hears when joining a meeting by dialing a phone number instead of using the app.
- Add-ons for Google Calendar and Outlook.

## App Notifications

The 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. You can customize each channel for [tailored alerts](#).
- **Meetings:** New meetings, meeting changes, cancellations, and reminders such as starting soon.

For such occasions, the app plays a ringtone, vibrates your mobile phone, and displays a notification toast and a badge. If you are logged in to the app from multiple devices, all devices notify you of the same event. The 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**.

# Calls

After logging in to the app, you are ready to make and receive calls on the same extension and/or phone number on Business Cloud Communications.

To test your headset and speaker without making an actual call on a desktop computer, select your initials > **Settings** > **Audio & Video**.



## Call Recording Permission

If asked for 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.

## Answer a Call

Incoming calls to your number will ring to all your devices. The app plays a ringtone, vibrates a mobile phone, and displays a call screen, following the device's notification settings. See [App Notifications](#) for more information.

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

## Place a Call

Place a voice call in multiple ways:

### Using the Dial Pad

Go to the **Calls** tab and select **Show Dial Pad**. On the mobile app, the **Dial Pad** icon appears on the bottom right corner.


- **Search.** 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.
- **Dial.** Enter a number using the on-screen or keyboard number pad, then click **Call**.
- **Redial.** On the mobile app, click **Call** on the dial pad to bring up the most recent call made on this device. Then click **Call** again.



## Looking for Speed Dials?

Create shortcuts to speed dial frequently used phone numbers and star codes. See [Shortcuts](#) to learn more.

## Using Call History

Go to the  **Calls** tab to view the Call History. There are two lists: Recent and Missed. The Recent list shows all calls made, received and missed.

To call someone, select either the **Recent** or **Missed** list, and then select the entry to call the person.

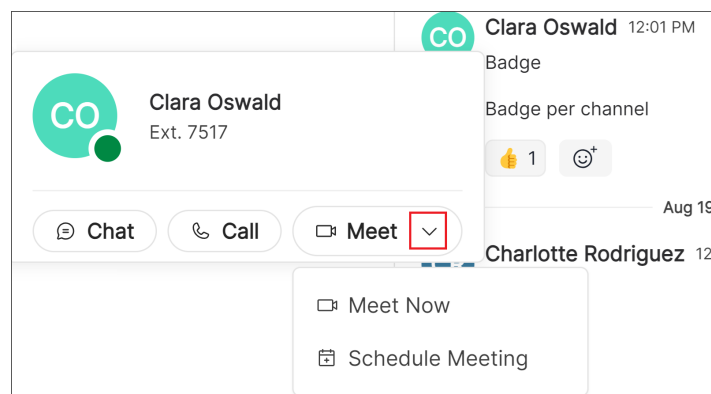


### Call History Entry on Mobile App

On the mobile app, tapping on the entry makes a call. To see details of the call, tap **Info** next to the entry.

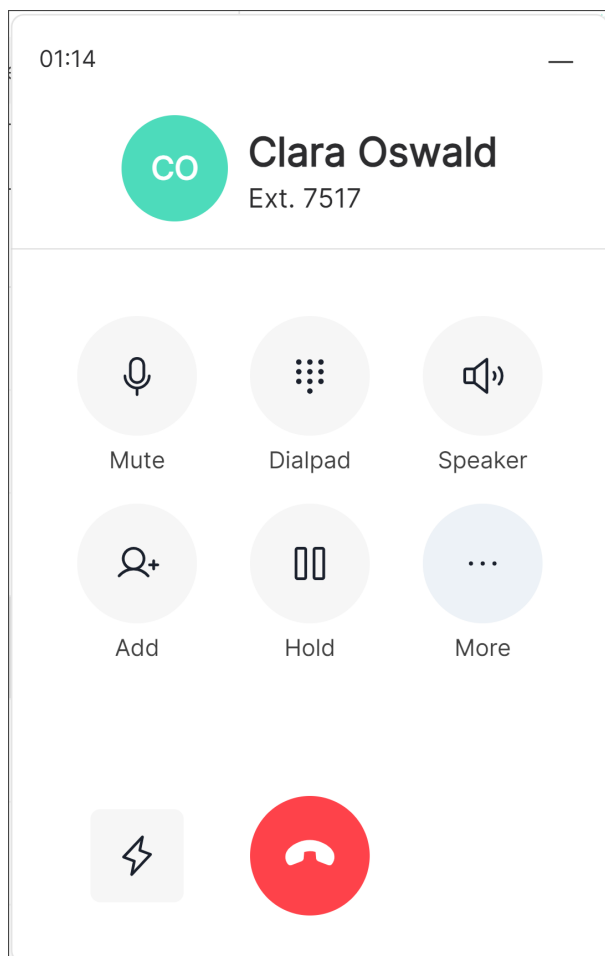
## Using Contact Cards

In the desktop app, a contact card appears when you hover over the contact's name or their initials anywhere in the app. This is a great way to start a conversation in any form.



## During an Active Call

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

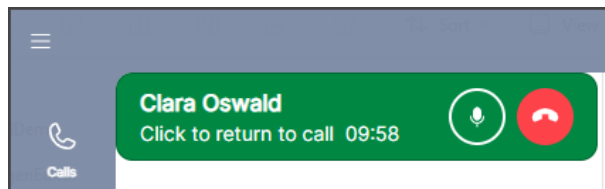


- **Mute** your voice so the remote party can't hear you.
- Use **Dialpad** to follow voice prompts such as "Press 0 to speak to an agent."
- **Speaker** lets you change the speaker for the call. On the desktop app, microphone can also be changed.
- **Add** places a second call. The first call will be on hold until the second call is ended or merged into a [conference call](#). To flip between the active calls, select **Swap**. Up to five concurrent calls are supported on the desktop app; two concurrent calls on the mobile app.
- **Hold** places the call on hold. The remote party hears music if configured on BCC.
- **More > Transfer to...** performs a blind transfer.
- **Shortcuts** allows you to perform configured shortcuts during a call.

## Navigate Away from the Call Screen

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.



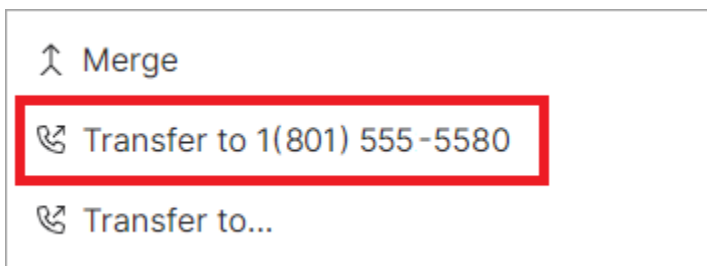
## Call Transfer & Merge

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 a 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

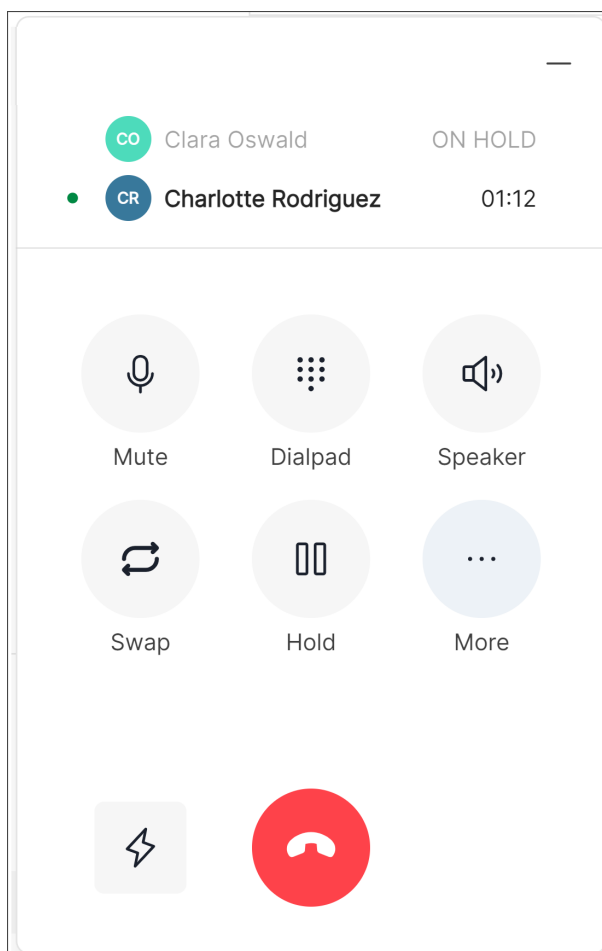
Use a blind transfer if you don't need to talk to the person the call is being transferred to. The recipient will see the call as if it is coming from the original caller.

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 active calls, you can merge all calls to a conference call.

1. While on 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 multiple calls are established, select **More > Merge**. You are in a call with all parties. If you end the conference call, all remote parties are disconnected.



### Cannot Split Merged Calls

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

## Call Blocking



From within the Cymbus app, you can block a phone number that is 7 digits or longer so that you won't receive future calls. Callers will hear a busy signal. 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 User Voice Portal or [right within the app](#).

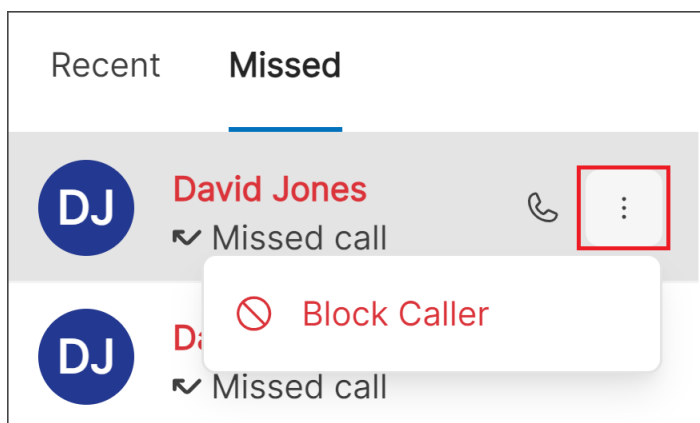
Each user can block up to 200 numbers. Phone numbers shorter than 7 digits, such as an extension, cannot be blocked using the app.

### Block a Phone Number


Block a phone number to stop receiving future calls.

#### From Call History

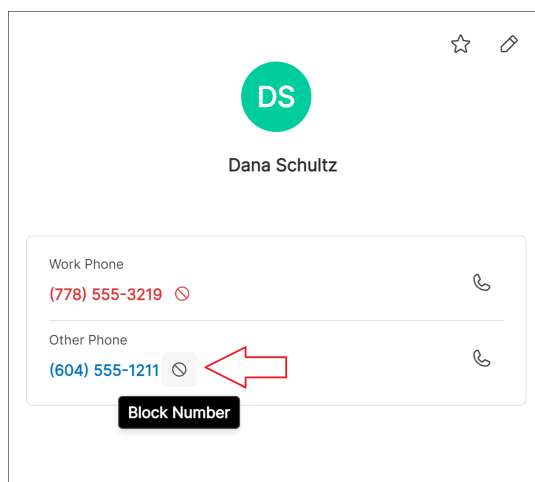
1. Go to the  **Calls** tab and select the number you want to block.
2. Select  **More** then **Block Caller**.



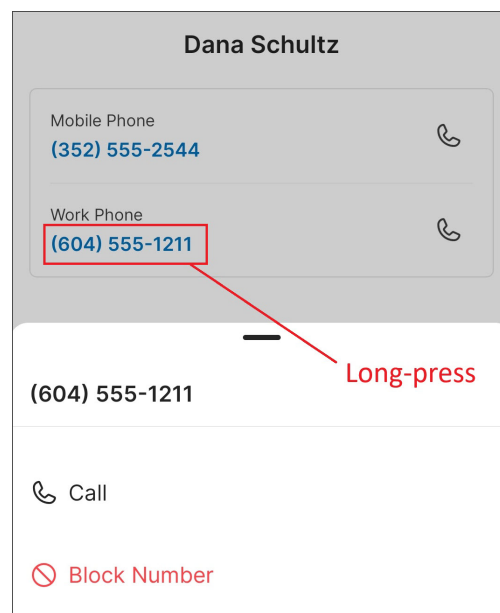
#### From Contacts

1. Go to the  **Contacts** tab and select the contact to block.
2. On the desktop app, hover over the number to reveal the Block icon, then click the icon. On the mobile app, long-press the phone number and select **Block Number**. Do not tap, which dials the number.

Desktop



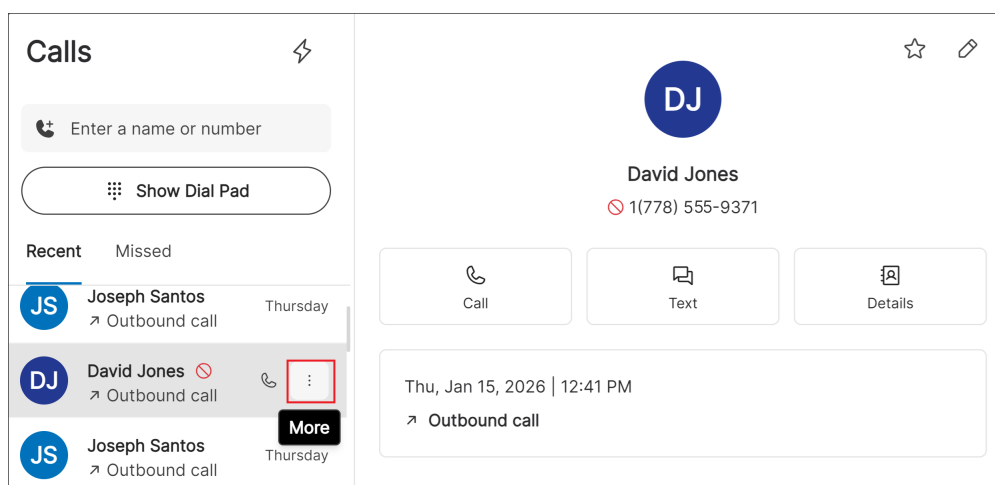
Mobile



## Unblock a Phone Number


### From Call History

1. Go to the **Calls** tab and select the number you previously blocked. The call history list indicates blocked calls with an icon and a red text.



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

## From Contacts

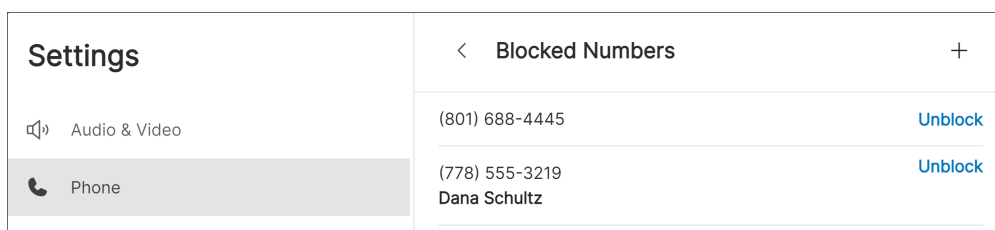
1. Go to the  **Contacts** tab and select the contact associated with the blocked number.
2. On the desktop app, click the red Blocked icon to unblock. Do not click the red phone number, which dials the number.

On the mobile app, long-press the red Blocked icon and select **Unblock Number**.

## View and Manage Blocked Numbers in App


See a list of blocked numbers without logging in to the User Voice Portal.


1. In the Cymbus app, select your initials then go to **Settings > Phone > Blocked Numbers**. The app displays a list of blocked phone numbers on your BCC account.

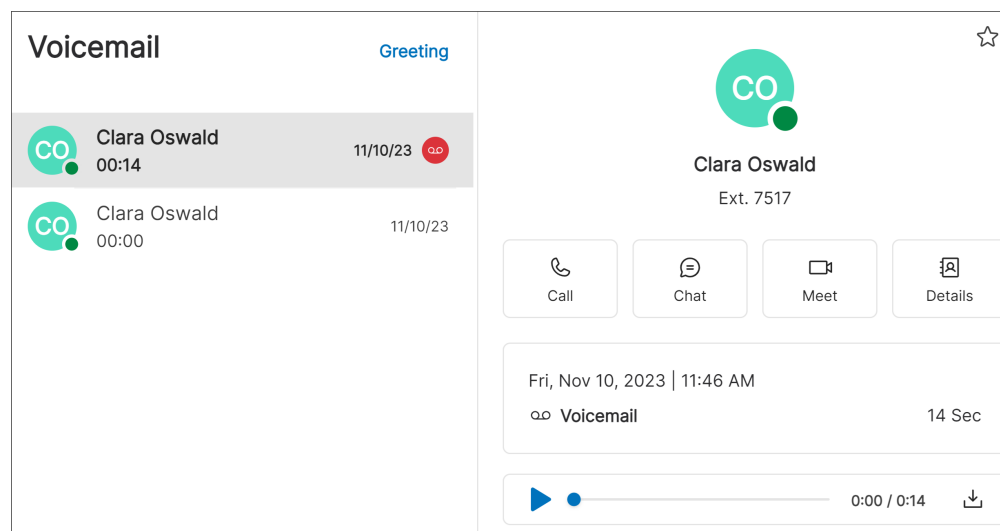


2. Click **+** to enter a phone number to block. Or click **Unblock** to start receiving a call from the number again.

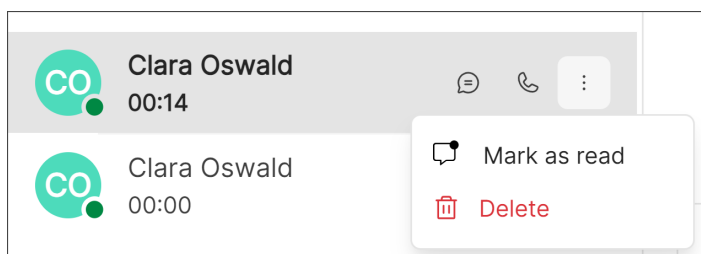
## Voicemail

Access both new and saved voicemail messages within the app. When someone leaves a new message for you, the app sends a notification and displays a badge on the  **Voicemail** tab.

To access the voicemail messages, go to the  **Voicemail** tab and select an entry. 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 Voicemail** > **Save** to a desired location.
- **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

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

Change your voicemail greetings in various ways:

- Go to the ☎ **Voicemail** tab and select **Greetings**. If prompted, enter your PIN to access the voicemail box.
- Use the app's dial pad and dial the Voicemail Management star code. If prompted, enter your PIN to access the voicemail box.
- Log in to the Voice Portal to access your messages online.

## Emergency Calling (911)

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.



### Power Outage

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 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

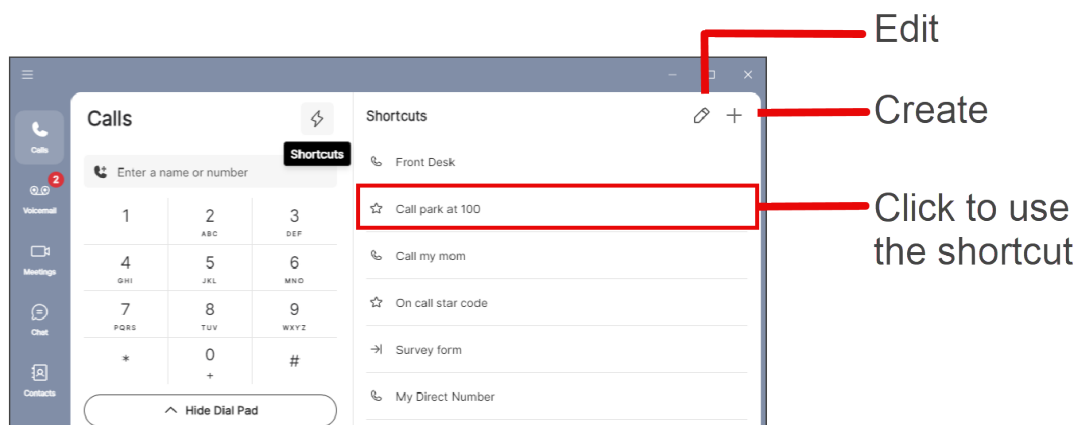
The Cymbus app on iOS and Android is not intended or designed for placing or supporting calls to emergency service or calls for the purpose of obtaining assistance, help, or aid in the event of an emergency. The Cymbus app on iOS and Android will redirect emergency calls to the native cellular dialer 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.

## Shortcuts

Shortcuts offer one-click access to frequently used actions, including:

- **Speed dials.** Place or transfer a call to a specific phone number or extension, such as the receptionist or your favorite cafe, so you don't have to look it up every time.
- **Star codes.** Let the app remember the star codes for features you use the most, such as Do Not Disturb, Call Recording, Group Log In/Out, and more.
- **URLs.** Open important web pages in your default browser while on a call. Quickly access an intake form, timesheet, CRM, and more, without searching your bookmarks for the right link.

Shortcuts are accessible from the **Calls** tab and can be used anytime, including during an active call.



## Examples

Here are a few examples of how shortcuts can be used.



### Star Codes Disclaimer

Star codes are customized for each account. Contact your account admin for a list of available star codes.

### Example 1: Speed Dial and Transfer

Instead of manually searching for the right extension each time, create shortcuts for numbers you use often. For example, if you regularly call the receptionist, create a shortcut with their extension. Then, whenever you need to reach the receptionist, simply select the shortcut to start the call.

To transfer an active call using a shortcut:

1. On the call screen, select **More > Transfer to...**
2. Select the shortcut for the receptionist.
3. Select **Dial the number** to complete the transfer.

### Example 2: Group Log In/Out

If you log in to a call group at the start of your shift, simplify the process with a shortcut. Suppose your star code for Group Log In/Out is \*89, and the group number is 153.

1. Create a shortcut with the star code and the group number, such as \*89153.
2. When your shift begins, open the app and use the shortcut. The app will dial the code.
3. Follow the audio prompts to log in.

At the end of your shift, use the same shortcut and follow the prompts to log out.

## Example 3: Call Recording

Does your account and license include call recording? Depending on the settings, there are four possible actions to manage recordings: start, stop, pause, and resume — which is a lot to remember. Use shortcuts to simplify the process.

1. Ask your account admin for the call recording star codes to use.
  - If automatic recording is enabled, you may only need the Pause and Resume star codes. If recording is optional, the Start and Stop star codes are required, but Pause and Resume may be optional.
2. Create a shortcut for each call recording action.
3. During a call, use the shortcuts to manage the recording. To stop the recording, use the Stop Recording shortcut or end the call.

## Example 4: Call Park

Call Park combines the elements of transferring a call and placing it on hold. Rather than asking a caller to call back later or sending them to voicemail, the user can transfer the call to a virtual parking spot where the caller will remain on hold until the called party is available.

1. Ask your account admin for the call park star codes and the parking spot to use.
  - Parking spots used in the Cymbus app range from 100 to 199.
2. Create two shortcuts per spot: one to park a call in a specific spot and another to retrieve it from that spot.
  - For example, if the call park star code is \*62 and the spot to use is 100, enter \*62100 for the call park shortcut. Similarly, enter \*66100 to retrieve it from the spot.
3. During a call, open the shortcut menu, and then select the shortcut to transfer the active call to a parking spot.
  - On the call screen, select **More > Transfer to...**
  - Select the shortcut for parking it at the spot.
  - Select **Dial the number** to complete the transfer. The call is parked at the spot.
4. Since the app has no visual indicator that a parking spot is in use, communicate to the appropriate colleague(s) that a call is parked in the spot. Make sure to include the spot number so they can retrieve it.

## Create a Shortcut

Up to 15 shortcuts can be saved on each device.

1. Go to the  **Calls** tab and select the  **Shortcut** icon.

2. Select **Create Shortcut**.
3. Enter a name, such as front desk or timesheet, to identify the shortcut. Keep it under 20 characters.
4. Select an action and configure the shortcut:
  - **Dial phone number:** Enter the contact's name, phone number, or extension. If the entry is in the contact lists, select the contact card when it comes up.
  - **Dial star code:** Enter the complete star code, starting with \*.
  - **Open URL:** Enter the complete URL, starting with https:// or http://.
5. Select **Create Shortcut** to save. The shortcut is added to the bottom of the list.





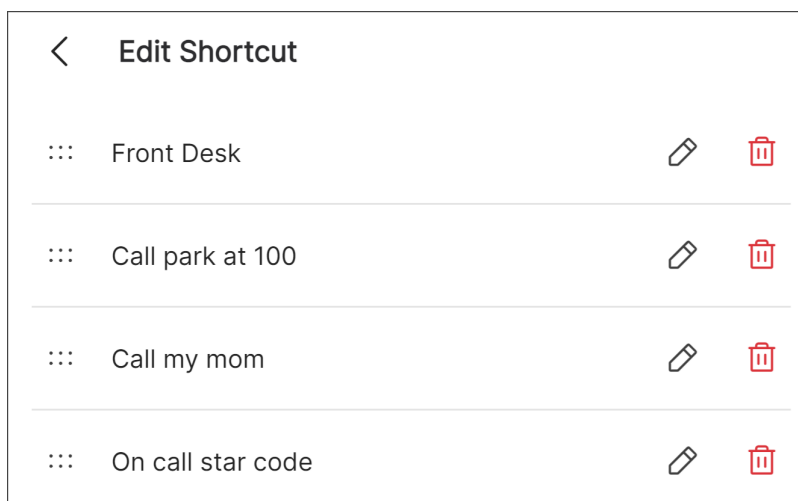
### Create Shortcuts on Each Device

Shortcuts are not synchronized between the Cymbus apps. Configure shortcuts on each device.


## Move or Change a Shortcut

Organize the shortcut list by moving the most used shortcut to the top, or in the order that works best.

1. Go to the  **Calls** tab and select the **Edit Shortcut** icon.
2. To move the shortcut up or down in the list, drag the  icon and release it where desired. To change the name or destination, select **Edit**. Update the shortcut and select **Save Changes**.



## Delete a Shortcut

1. Go to the  **Calls** tab and select the **Edit Shortcut** icon.
2. To the right of the shortcut to delete, select **Delete**.
3. Read the confirmation dialog and select **Delete** again.

## Call Control using Jabra Headsets

Using certain Jabra headsets on the Cymbus desktop app, you can control your active calls and meetings directly from the headset controls instead of clicking the on-screen prompts. The LED status light on the headset reflects the app call status, such as whether you're busy or receiving an incoming call.

Supported call control functions include:

- Answer or decline an incoming call
- Mute and unmute
- Volume control
- Hold and resume the call
- Call waiting (Hold and Accept / Decline the second call)
- Swap between two calls
- End the call
- Leave the meeting

The following are also supported if it's available to your headset.

- Moving a microphone boom arm
- Docking/undocking a headset from a docking station



### Note

Each headset has different buttons and actions. Refer to your headset documentation on how you use the headset buttons for call control.

## Supported Jabra Headsets

Call control is supported when headsets are connected to the desktop computer via USB or Bluetooth. The following headsets have been tested but other Jabra headsets might work with the desktop apps. No additional software required, such as Jabra Direct.

- [Jabra Evolve2 30 SE](#)
- [Jabra Evolve2 40 SE](#)
- [Jabra Evolve2 65](#)
- [Jabra Engage 75 SE](#)

## URL Launch on Calls (Desktop)

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 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 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 cannot be over 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 in to your HubSpot, and check the URL in the 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 that 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 desktop app, and click **Cymbus > 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.

## Integrations

---

### Web URL Launch Events

Launch a search in your desired CRM or ticketing system.

[User Guide](#)

**Outbound calls**

```
https://app.hubspot.com/contacts/39[REDACTED]/objects/0-1/views/all/list?query={phoneNumber}
```

**Inbound calls**


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

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

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.

# Chat

Use the  **Chat** tab to exchange messages with the contacts on the Company list, either a 1:1 chat via Direct Messages or a group conversation via [Channels](#).

## Search




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

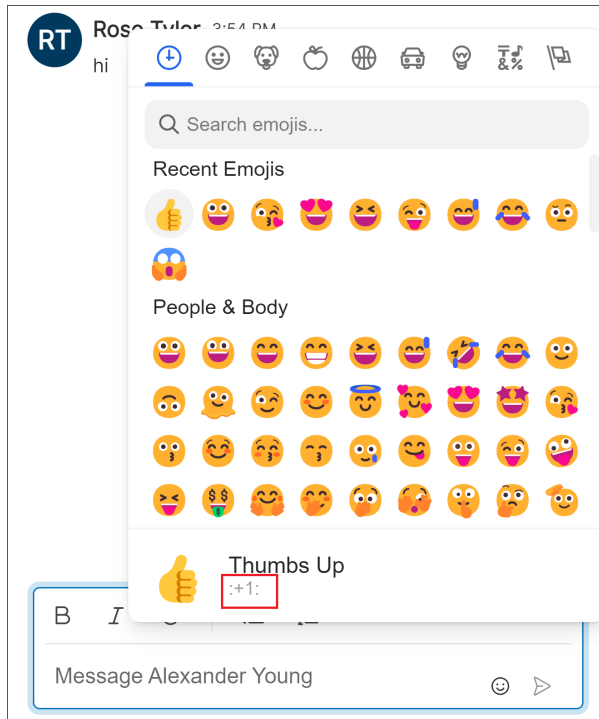


### No message search

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

## Messages

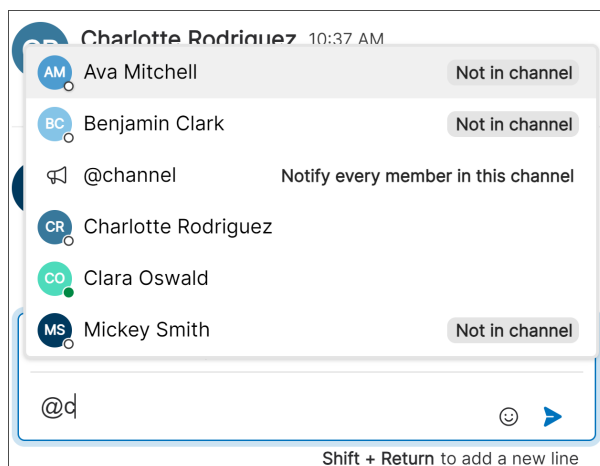
- **Send.** On the desktop app, pressing Enter sends the message. To start a new line within a message, press **Shift + Enter**. On the mobile app, tapping the  *Send* icon sends the message. To start a new line within a message, tap the return key on the on-screen keyboard.
- **Copy.** On the desktop 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.** 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.** Add an emoji in your message by selecting from the 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 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.

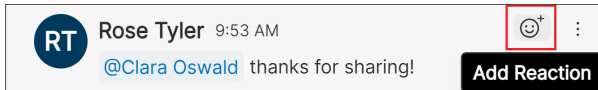


# Reactions

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.
4. Select an emoji to add it to the message.

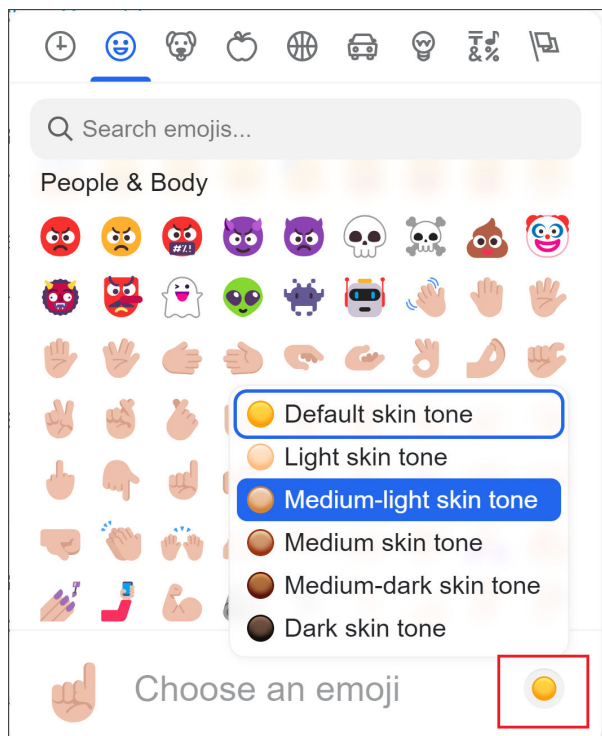


### Remove a Reaction

To remove a reaction you added, simply select the emoji again.

## Emoji Skin Tone

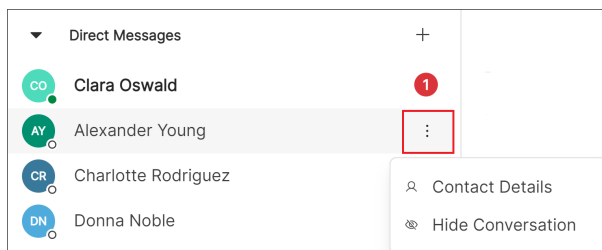
On the desktop app only, you can set a skin tone. Open the emoji menu and click the circle on the bottom right to select a skin tone.



## Hide a Conversation

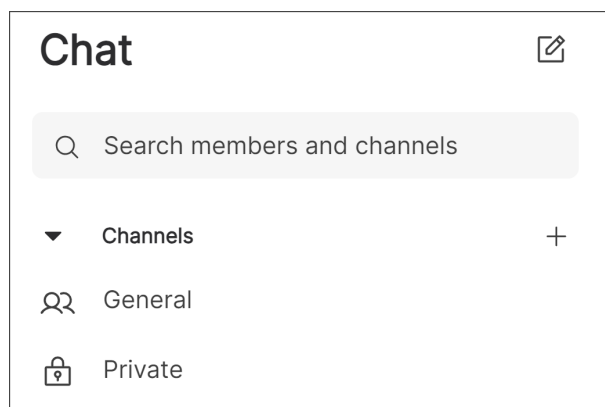
Too many conversations in **Direct Messages**? Hide the ones you don't need from the list. Hidden conversations are not deleted or muted, and will reappear when you receive a new message from that person. You can also find the conversation again by searching for the person's name.

1. Under **Direct Messages**, hover over the conversation to hide, and select **More**. On the mobile app, long-press the conversation.
2. Select **Hide Conversation**.




## Channels

Use a channel for a group conversation. 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 app shows the private channel on the  **Chat** tab with a lock icon, and you receive notifications on new messages in the channel.

If you no longer need to be part of a channel, [leave a channel](#) and it disappears from your **Channels** list.

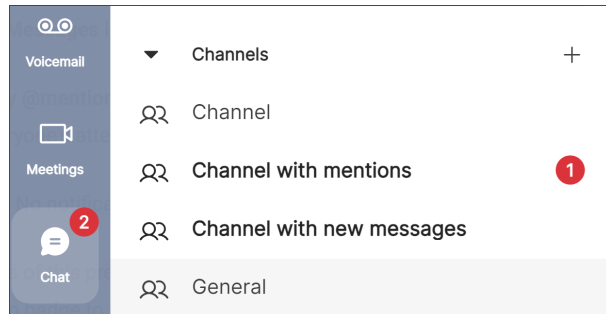
## Channel Notifications

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:

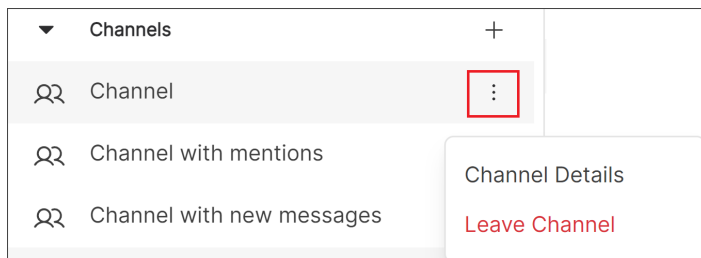
- **All Messages in a channel.** This is the default.
- **Only @mentions.** You'll receive a notification only when someone tags you in the channel or tags @channel to get everyone's attention.
- **Off.** No notifications at all for this channel, even when someone tags you.

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 unread messages and mentions for you.

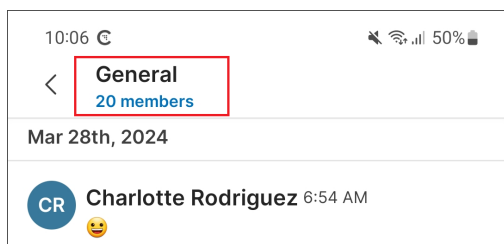


To change notification preferences for a channel:

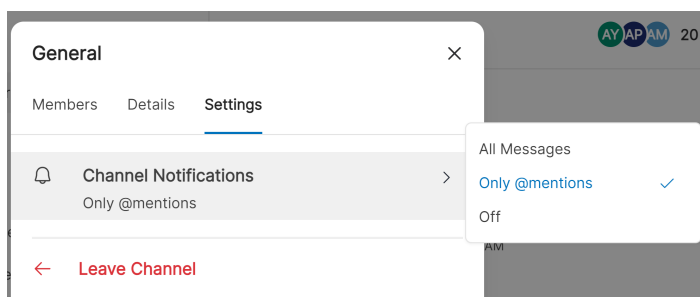
1. Go to the  **Chat** tab.
2. On the desktop app, hover over the channel to reveal  **More** and select **Channel Details**.



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*.



## 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 each name and select **Add**.



### Previous Messages

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, and 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, no one can delete or archive it; 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**.

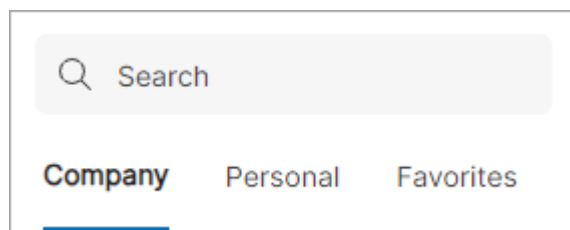
## Contacts & Presence

The  **Contacts** tab shows all the contacts you have in the app which are synced across the Cymbus 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 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 app needs your permission to access your contacts. These device contacts do not appear across other Cymbus devices until you add them to the 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 in the  **Contacts** tab, select the list (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.



### Searching Across All Types

If you are searching for a contact to make a phone call on the desktop, use the dial pad which searches all contact types.


## 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. Up to four phone numbers and three email addresses can be saved for a personal contact.

- **Add from Contacts.** Add a new contact from the  **Contacts** tab. On the desktop app, select  **Create Personal Contact**. On the mobile app, select **+** in the top right corner.
- **Add from Call History.** Add a number to a new or existing contact from the **Calls** tab. On the desktop app, hover over the number you want to add, and select **More > Create New Contact** or **Add to Existing Contact**. On the mobile app, select the **Info** icon to open the call entry, then select either option.
- **Edit.** In the  **Contacts** tab, select a contact, then select **Edit**. When you're done, select **Save Changes**.
- **Delete.** In the  **Contacts** tab, 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 devices.

## Device Contacts (On Mobile Phones)

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



### Editing a Device Contact

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

You also can add your mobile contact to the Personal list, so the contact appears on all of your devices. Remember, this creates a duplicate entry in the Personal list, so 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 the blue **Favorite** icon. The contact disappears from the Favorites list but remains on the other list.

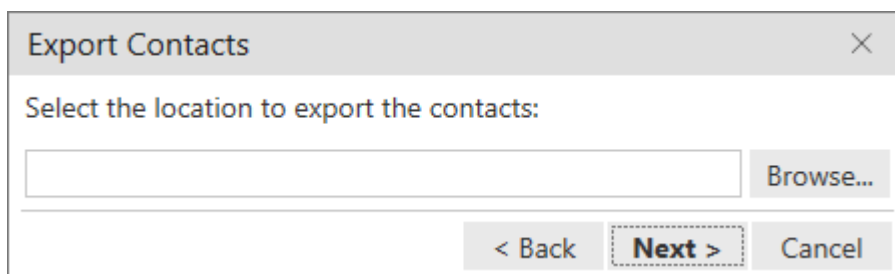
## Import Contacts from Legacy App

Do you have many personal contacts to move from the legacy app to the new app? The new desktop app version 1.6.4+ supports contact importing via a .csv file from the legacy Cymbus app. New personal contacts are created for every import. Import once and you will have contacts in your new apps, both desktop and mobile.

### Step 1: Export Personal Contacts from Legacy App

Follow these steps to save your contact list to your computer, so you don't lose it.

1. In the legacy desktop app, go to the **Contacts** menu and select **Export Contacts**.
2. Select **Comma separated values (\*.csv file)** and click **Next**.
3. Click **Browse** and select the location you want to save it.





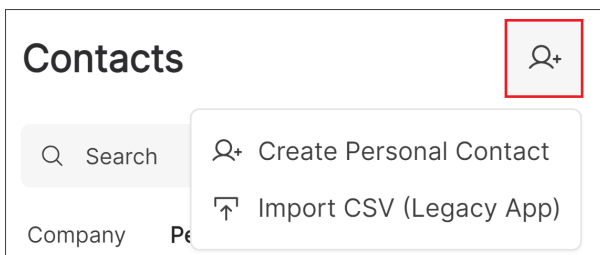
4. Enter a name for the file and click **Save** then **Next**.

### Step 2: Import Personal Contacts to New UC App

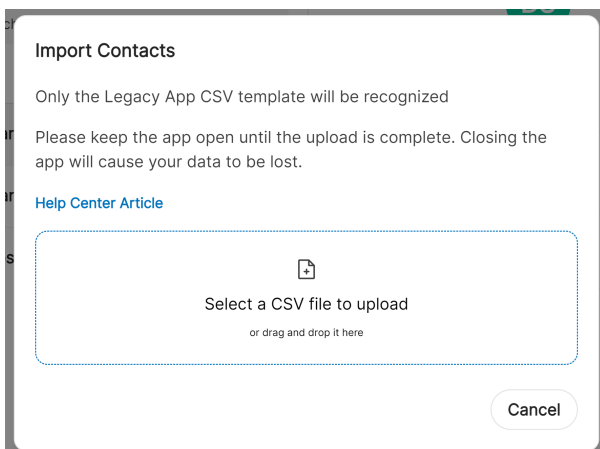
Use the new desktop app to import the .csv file you just saved on your computer. Once imported, your personal contacts will appear on your new mobile app as well.

New personal contacts are created for every import. In other words, there is no merging with existing contacts. If you already have a personal contact with the same name, you will see a duplicate entry after import.

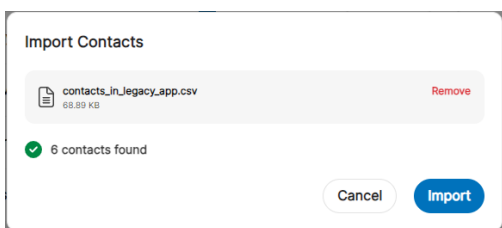
1. In the new desktop app, go to the  **Contacts** tab.
2. Click  **Add** then **Import CSV (Legacy App)**.



3. Click **Select a CSV file to upload**.



4. Select the .csv file you saved from the legacy app. Keep the app open while the file is validated. The app displays how many contacts it's going to import to your new app.



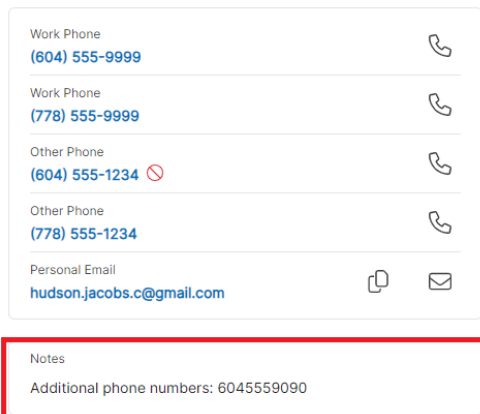
If you see an error, open the .csv file in a text editor, locate the row and the column, and change the value. For example, if the error says "Phone number has invalid format", remove the unsupported characters from the phone number such as -, #, ( and ). Save the file and upload it again.

5. Click **Import** to add the contacts to your app.
6. If the import is successful, click **Done** to close the dialog.

7. Go to your Personal contact list to see the imported contacts.

## Multiple Phone Numbers and Email Addresses

The new app has maximum four (4) fields for phone numbers and three (3) for email addresses. Any additional numbers and addresses are added to the **Notes** field of the new contact. Go through each imported contact to clean up any obsolete information and make sure their current numbers are in the phone number fields. Numbers in the Notes field are not clickable to start a call.



# Host or Schedule a Meeting

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

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, 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.

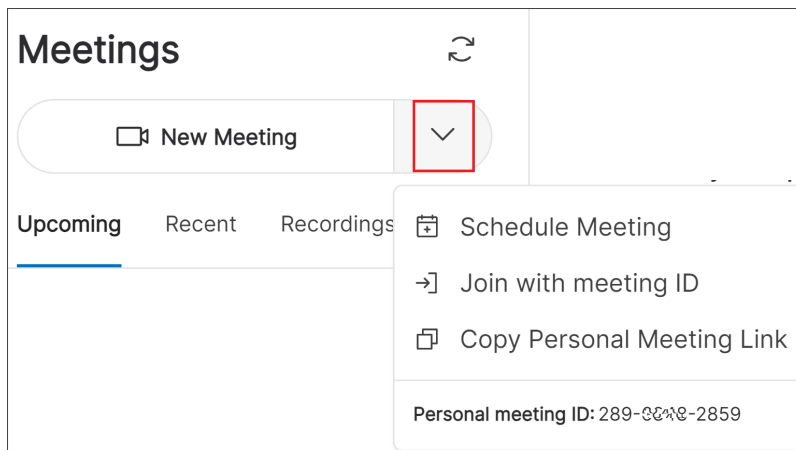


## Waiting Room

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

## Schedule a Meeting

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



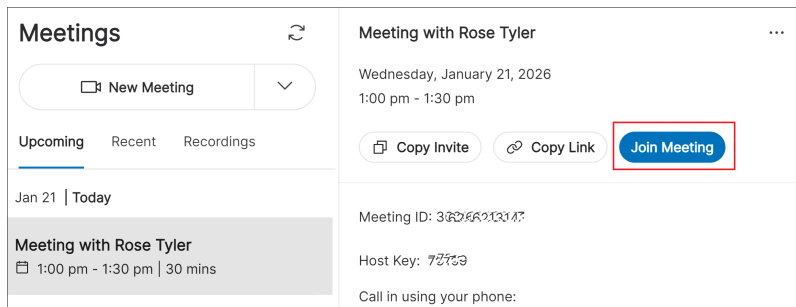
2. In the **Invite people** field, add participants by typing their name or email address.
3. Configure meeting settings. If you choose to generate a meeting ID automatically, you have options to enable a passcode and a waiting room. If scheduling a recurring meeting, the meeting ID stays the same for 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).
4. 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

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



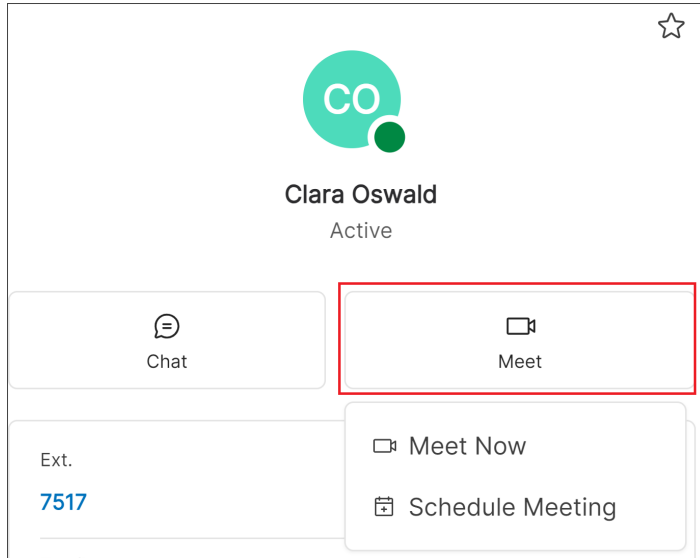
3. In the preview dialog, set meeting preferences such as mute, camera, and background effects.
4. If you enabled a waiting room, [approve or deny participants entry](#). No one can join the meeting without approval.

## Start an Ad-Hoc Meeting (Meet Now)

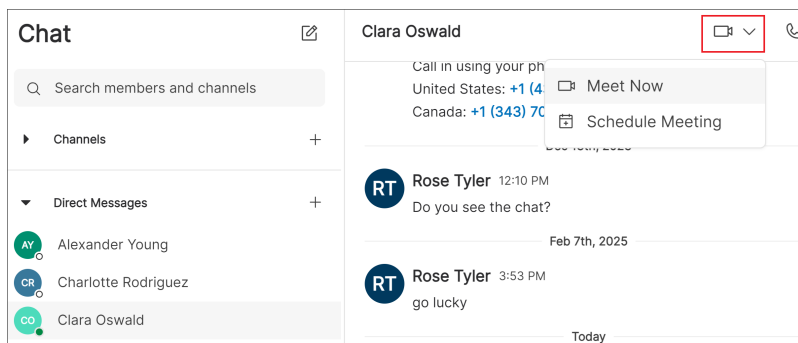
Start a meeting anytime. **Meet Now** is the perfect way to have a quick meeting with someone at your company. When you start a meeting with someone, the person receives your meeting link in a direct message. You skip the meeting preview and join the meeting muted with the camera disabled.

There are multiple ways to start an ad-hoc meeting:

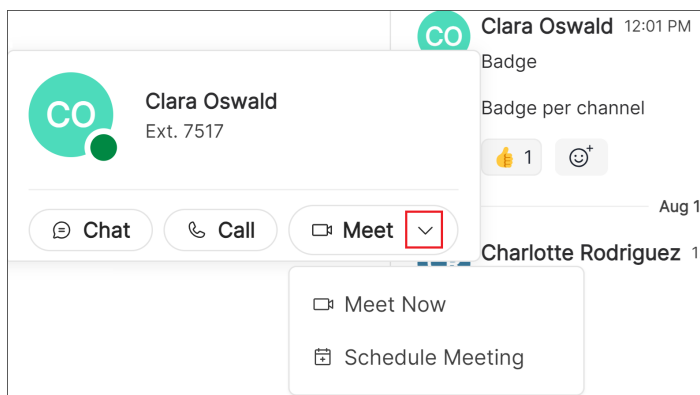
- Go to the **Contacts** tab, open the contact page, and select **Meet > Meet Now**.



- From the **Chat** tab, select a 1:1 conversation, select the arrow on the top right corner, and select **Meet Now**.



- Anywhere on the desktop app, hover over the contact's name to see the contact card, then select **Meet > Meet Now**.





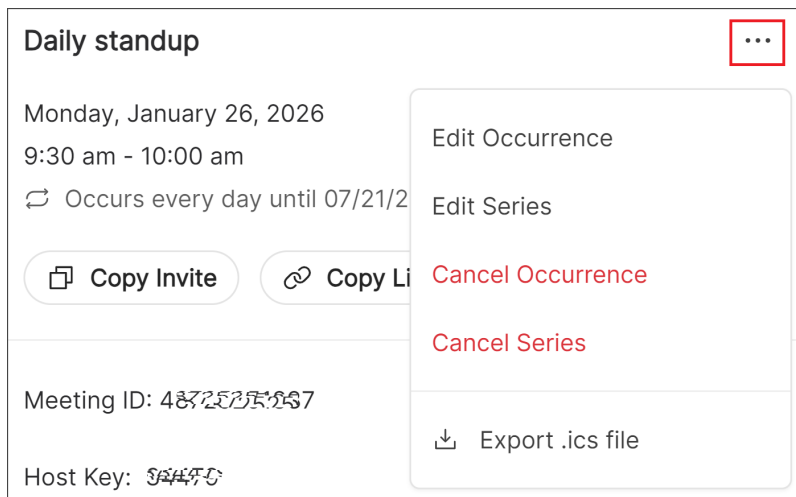
### Recording an Ad-Hoc Meeting

Meet Now meetings can be recorded and downloaded from the **Recordings** list; however they do not appear in the **Recent** list after they end.

## 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.

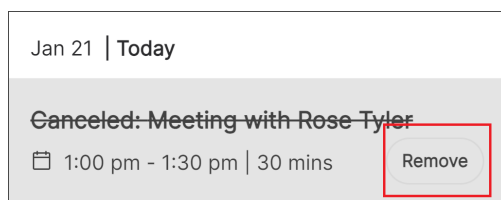
1. Go to  **Meetings** and select a meeting you want to cancel or change.
2. Select  **More** in the top right corner, and select the task you want.



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**.



## Host Controls

During a meeting, the host can:

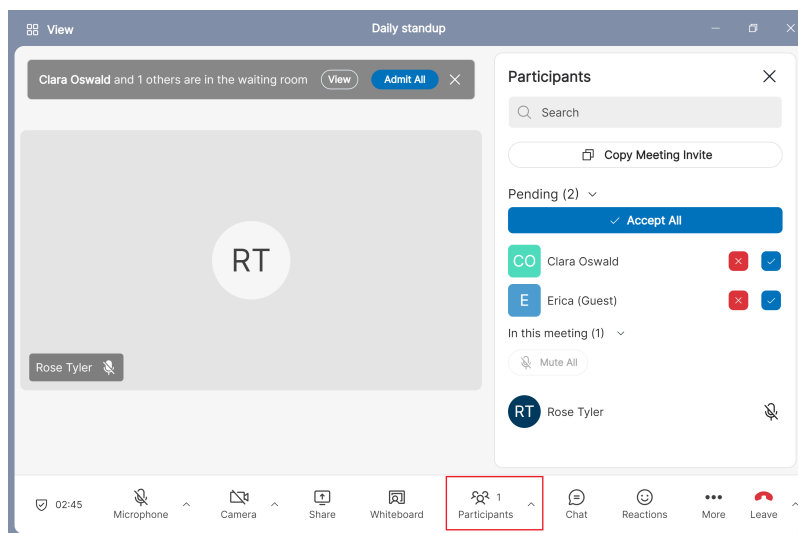
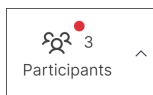
- Approve or deny the entry of each participant when a waiting room is enabled.
- Mute all participants (except for the host themselves).
- Mute a particular participant. The participant will be notified that they have been muted. They can un-mute themselves anytime; however the host cannot un-mute them.

- 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

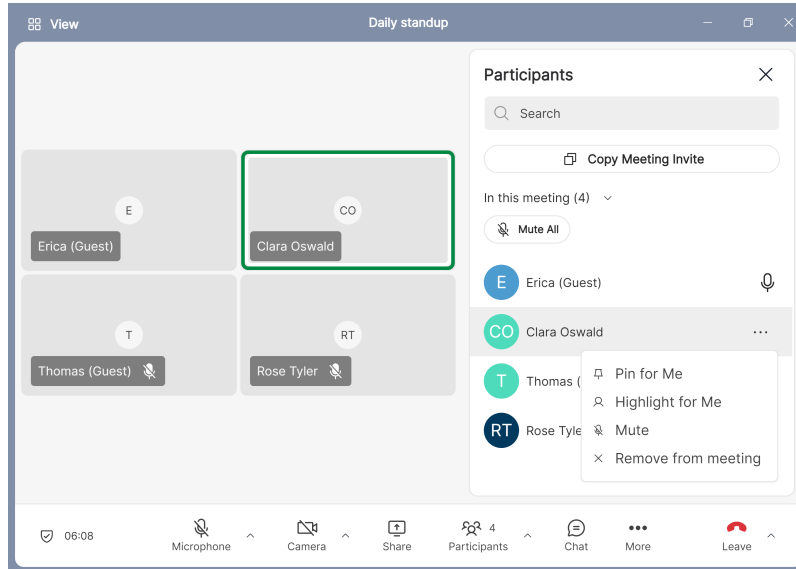
When a waiting room is enabled for a meeting, the host must approve the entry of each participant before they can join.

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 checkmark 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.



## 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.

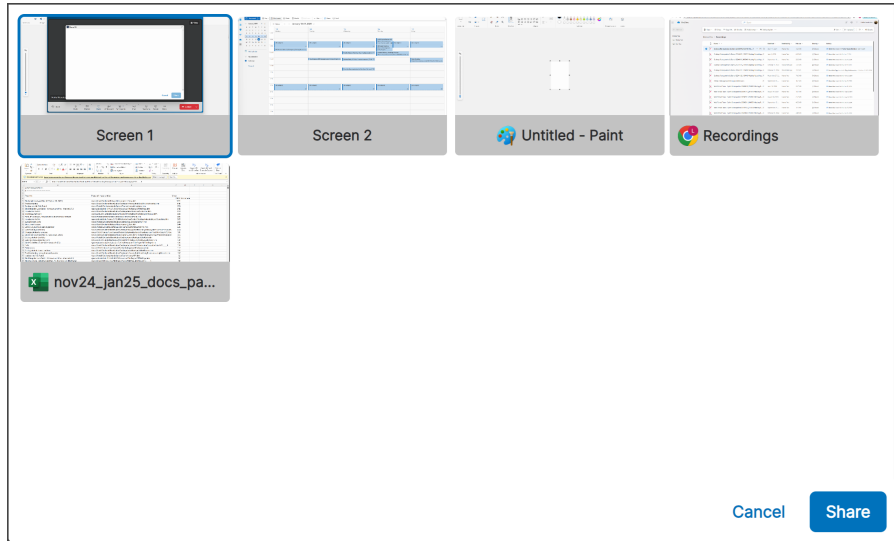
## Desktop (Windows and Mac)

To start sharing:

1. Select **Share** in the meeting toolbar or in the PiP window.

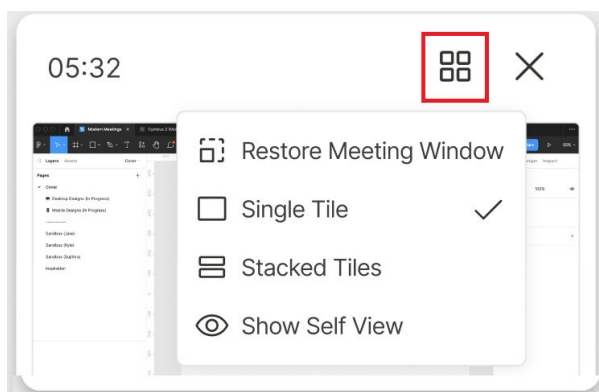
On Mac, if this is your first time to share screen on this device, the Cymbus app asks for a permission to allow your screen to be shared. Select **Open System Preferences** to grant the **Screen Recording** permission. The dialog says your screen will be *recorded*; however, for Cymbus meetings, your 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 window shrinks to a picture-in-picture (PiP) window. The shared screen or application has a red highlighted border around it.



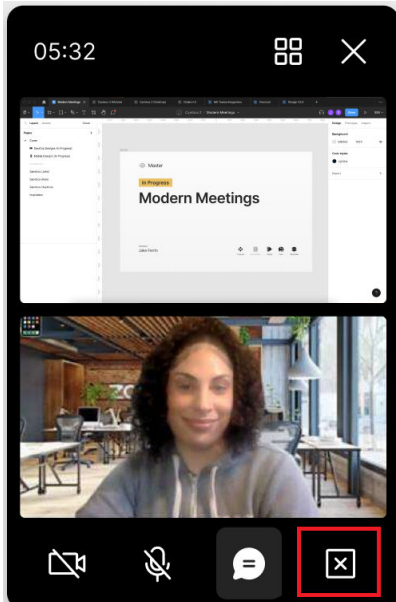
3. Place the PiP window anywhere you like by clicking the top of the PiP window and dragging it. The PiP window is not visible to meeting participants. In the PiP window, you can:
  - View your screenshare as it appears to others.
  - See participants and their reactions.
  - Unmute yourself.
  - Turn on/off your camera.
  - Stop sharing your screen.

To share a different screen or mute other participants, you need to go back to the meeting window first. To do so, click the **View** icon on the PiP window and select **Restore Meeting Window**.



To stop sharing:

- Select the **Stop sharing** icon in the PiP window, or select **Stop Share** in the meeting toolbar.



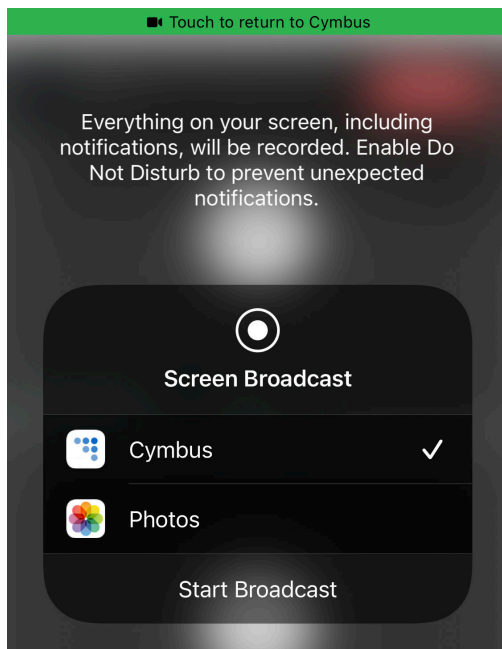
## Screenshare on iOS

To start sharing:

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

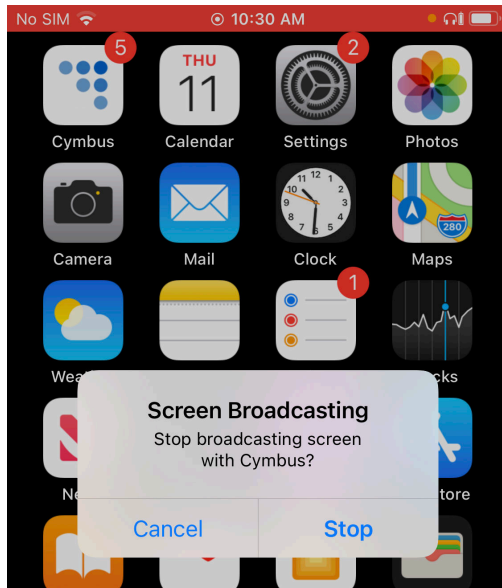
The dialog says your screen will be *recorded*; however, for Cymbus meetings, your screen will be only shared to other participants, and it will not be recorded.

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



To stop sharing:

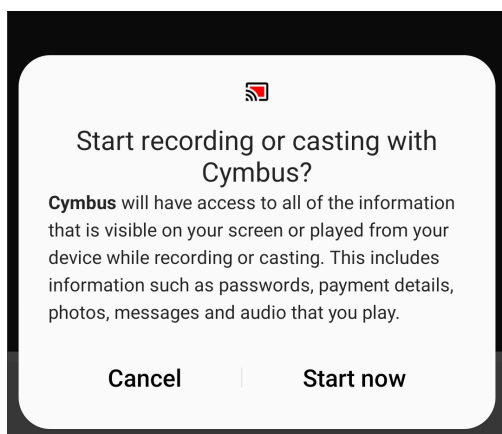
1. Tap on the red bar at the top of the screen. A message pops up to stop broadcasting with Cymbus.
2. Tap **Stop**.



## Screenshare on Android

To start sharing:

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



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.

## 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.

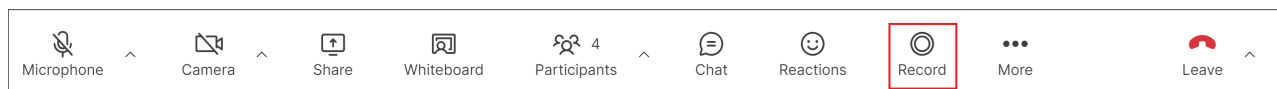
### What's Recorded?

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 an 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 the recording is in progress and see the Recording icon in the meeting toolbar.



- **How do I pause a 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, the recording continues until the meeting ends and/or everyone leaves. No one else can stop a recording.

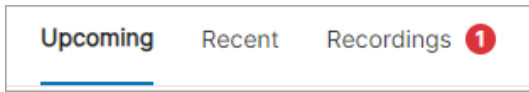
- **How do I delete a recording?**

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 to 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.

## Whiteboard (Desktop)

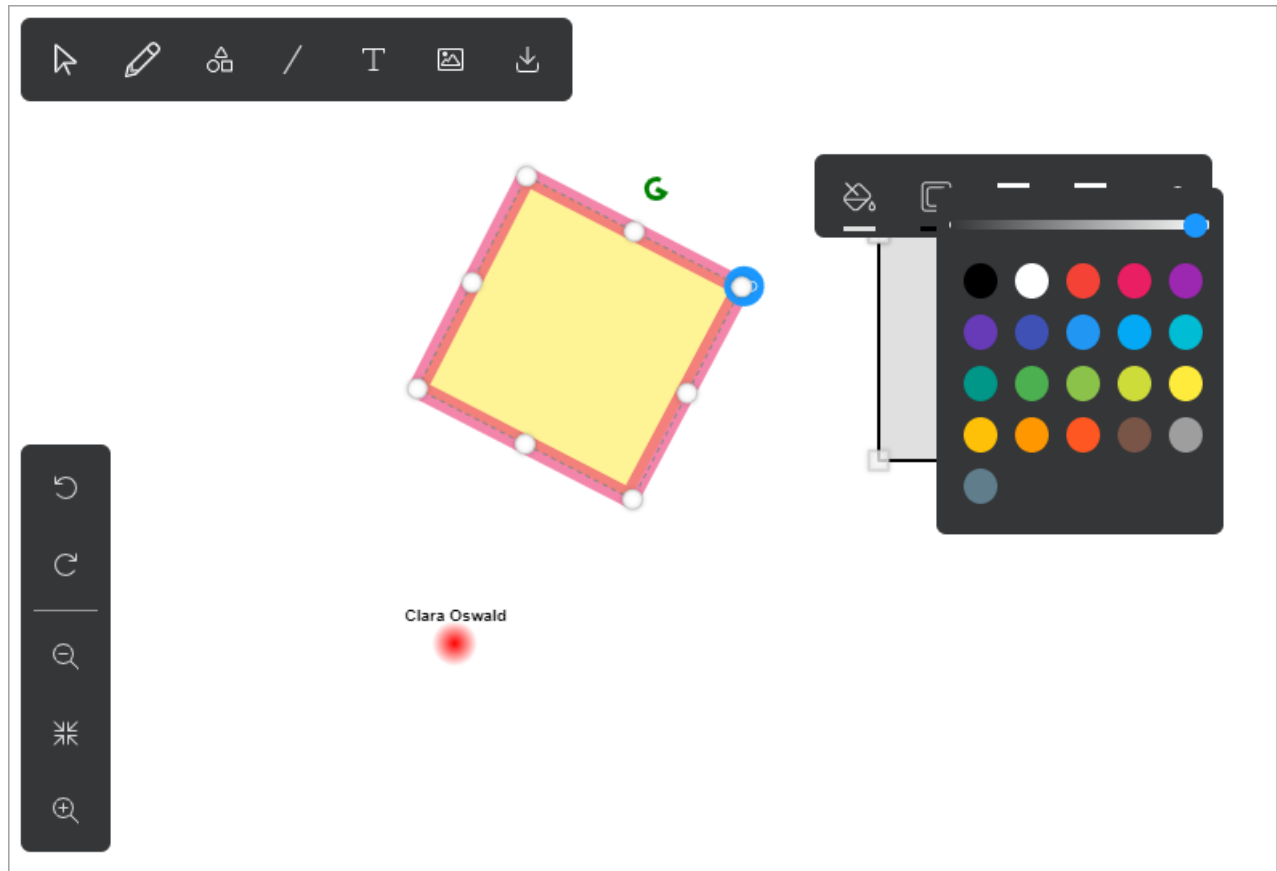
Whiteboard allows users to draw on the video screen for real-time collaboration during a meeting. Draw shapes, highlight a region, drag and drop images, snap to grid, and more. Desktop participants can start a whiteboard session with other participants and then download the results (.png, .pdf, or .svg)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

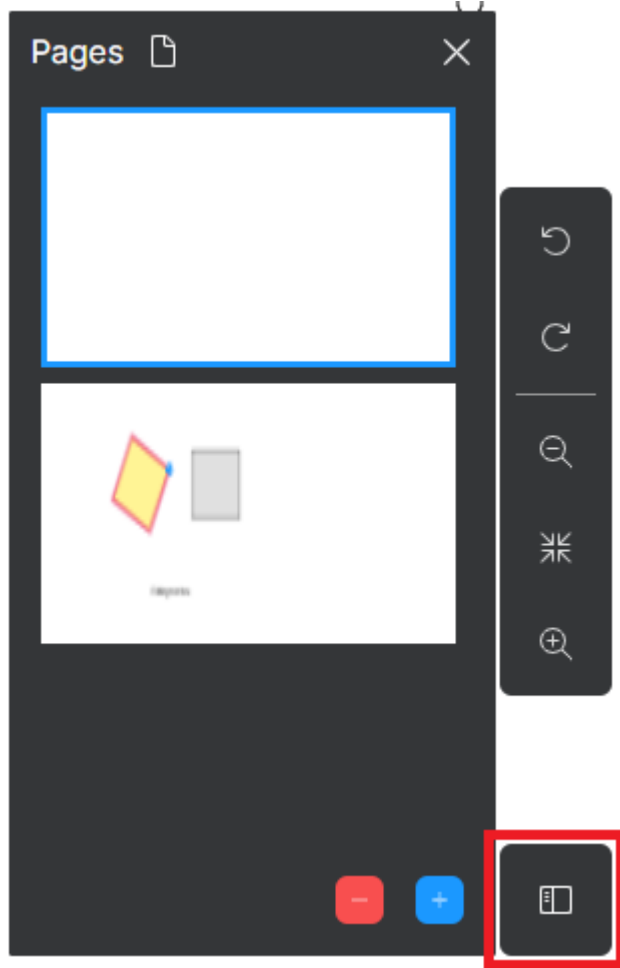


## Add Components

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.

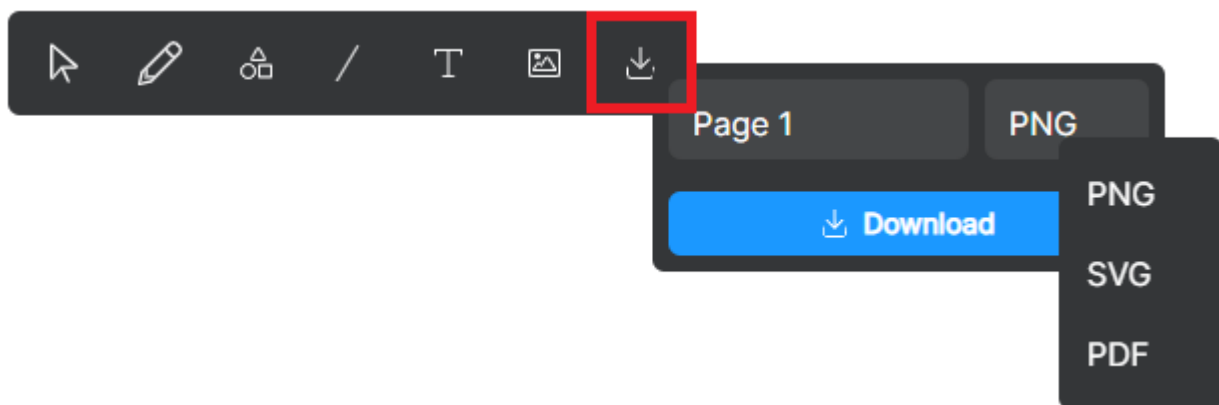
## Add Pages

To add a page, click the **Panel** button in 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 tool bar, 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.



## 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.

## Schedule Meetings Using Google Calendar

The BCC users with the Professional license 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 Cymbus 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 a 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.



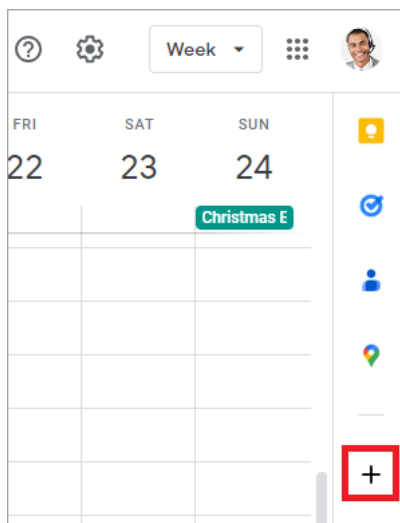
### Getting Invited to a Meeting

Be sure to check the Cymbus app for meetings hosted by other users. This add-in 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 and 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.

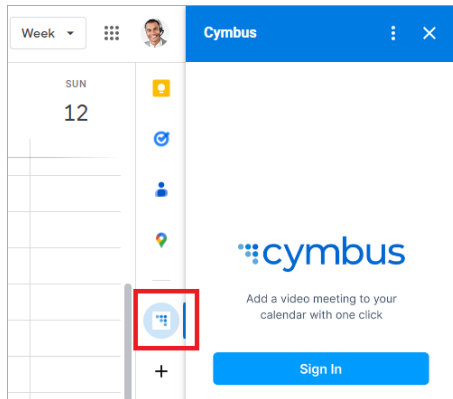


2. In the pop-up, search for Cymbus and click the Cymbus add-on to see details. Alternatively, visit [this link](#).
3. Click **Install**.
4. Choose an account for your Google Calendar.
5. Give the Cymbus add-on to access your Google account. When complete, the Cymbus icon appears on your Calendar sidebar.

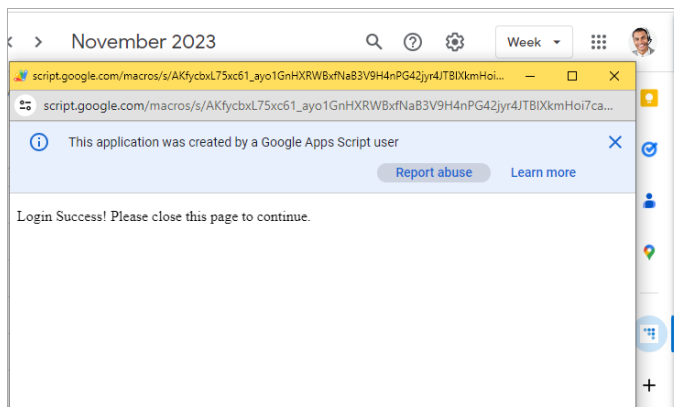
## Schedule a Meeting Using Google Calendar

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

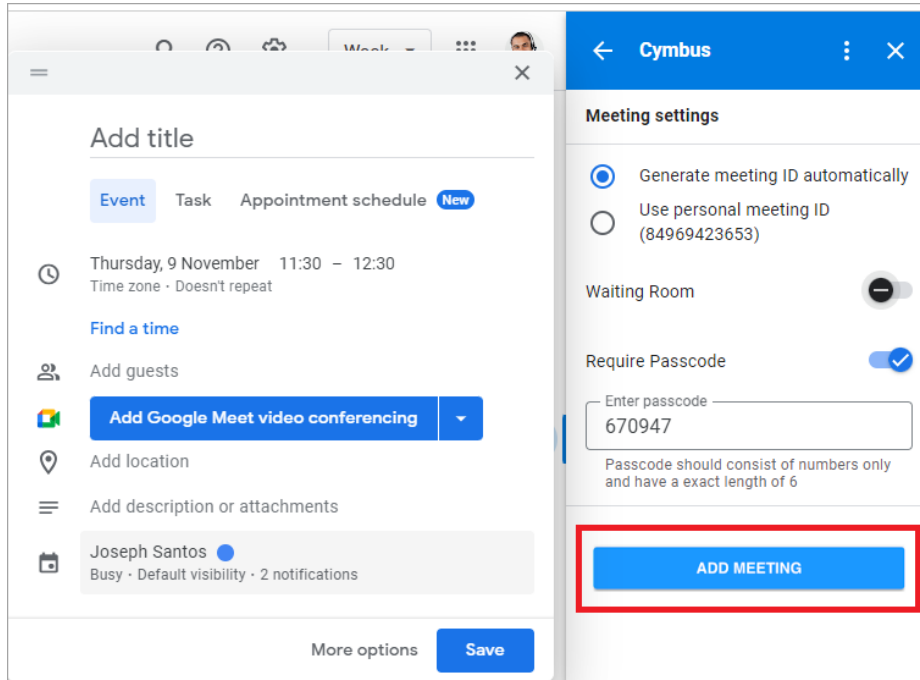
1. Log into Google Calendar using your Google account.
2. On the sidebar, click the Cymbus icon to open the Cymbus add-on, then click **Sign In**.



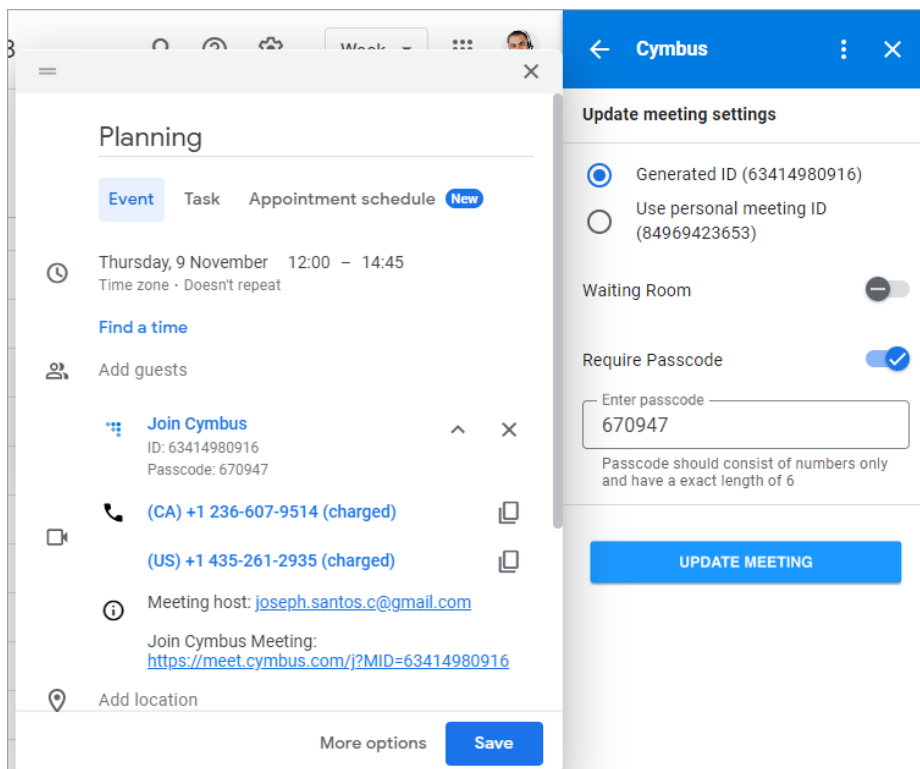
3. Log into the Cymbus add-on using your Cymbus account, which is typically different from your Google account used for Google Calendar.
4. When the "Login Success!" page appears, close the pop-up. The add-on page shows your Cymbus username. You are now ready to schedule a meeting.



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** on the add-on page. The New Event dialog now displays the Cymbus meeting link.

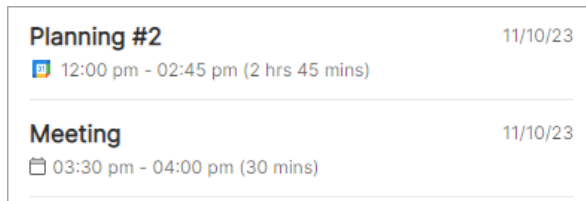


7. In the New Event dialog, add participants, and set a recurrence and notifications.



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.

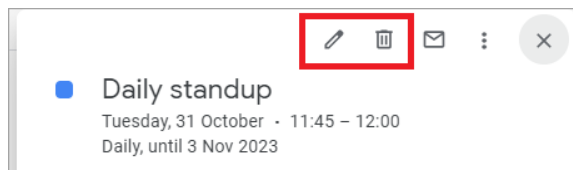
In the Cymbus app, click **Refresh** on the Upcoming list to see the new meeting with the Google Calendar icon.



## 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 Outlook Add-in

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 license only.



### Getting Invited to a Meeting

This add-in integrates the Cymbus meetings you schedule from Outlook into your Cymbus apps, but it does not automatically populate Cymbus meeting 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



### Instructions for the IT Admins

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 a web browser:

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

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

The screenshot shows the Microsoft AppSource listing page for the Cymbus Outlook add-in. The page title is "Apps > Cymbus". The main content area features the Cymbus logo (a cluster of blue circles), the text "Cymbus by Alianza Inc", and the Outlook logo. A blue "Get it now" button is highlighted with a red rectangular box. To the right of the button is a star icon and the text "Save to my list". Below the main content area, there are tabs for "Overview", "Ratings + reviews", and "Details + support". The "Overview" tab is selected. The content under the "Overview" tab includes a consent statement: "By getting this product, I give Microsoft permission to use or share my account information so that the provider can contact me regarding this product and related products. I agree to the provider's [terms of use](#) and [privacy policy](#) and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate [terms](#) and [privacy](#)." Below this is a promotional text: "Elevate your meeting scheduling experience with the Cymbus add-in seamlessly integrated with Outlook".

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 permission 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, your users see the Cymbus add-in when they create a new meeting in Outlook.

## Schedule a Meeting Using Outlook

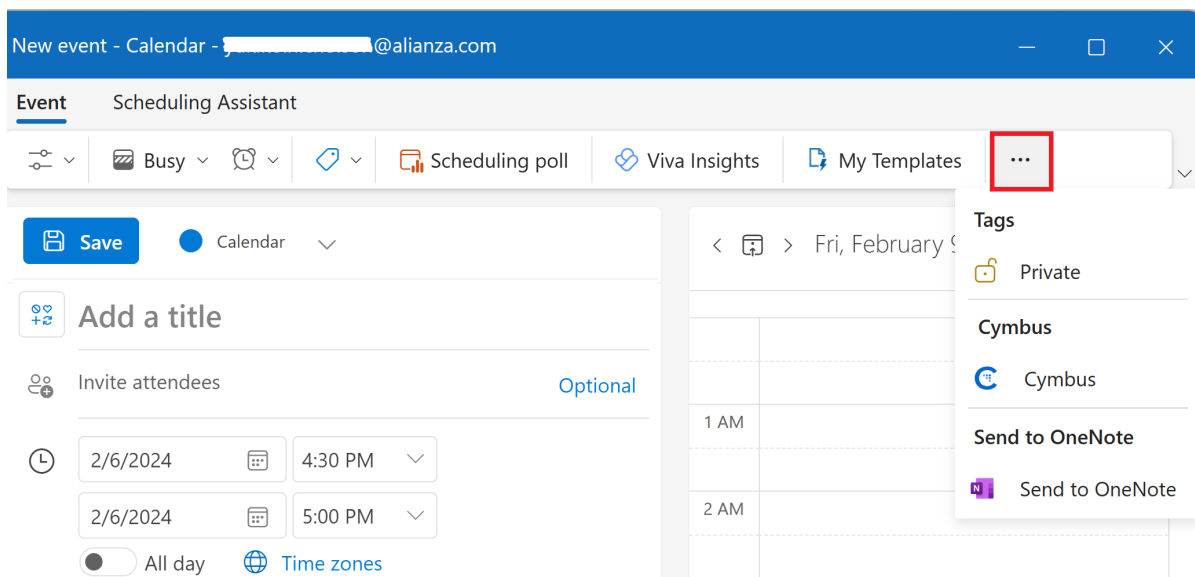
Once your IT admin enables the Cymbus add-in for your organization, it will be displayed in Outlook.



### Outlook Web App

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.

- In the right pane, configure the Cymbus meeting settings, including the Meeting ID, waiting room and a passcode settings as needed.

The screenshot shows the Microsoft Teams meeting creation interface. On the left, the 'Add a title' section is visible, along with 'Invite attendees' (Optional), date and time selection (2/6/2024, 4:30 PM and 5:00 PM), 'All day' and 'Time zones' options, 'Don't repeat' recurrence, 'Search for a room or location', and 'Teams meeting' toggle. The right pane is titled 'Cymbus Meeting settings' and includes the following options: 'Generate meeting ID automatically' (selected), 'Use personal meeting ID (09854517795)' (unselected), 'Waiting Room' (disabled), and 'Require Password' (enabled). A password field contains six dots. A blue button labeled 'Add Cymbus Meeting' is highlighted with a red border. Below the button, it says 'Signed in as Clara Oswald' and a 'Sign out' button is visible.

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

▶ Send | ▼

●
Calendar ▼

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## Add a title

---

rose.tyler@auuconnect.net <rose.tyler@auuconnect.net> ×

Optional

---

Suggested times
Preferences

**Fri 2/2**

**12:00 PM - 12:30 PM**

✓ Available: Everyone

**Fri 2/2**

**12:30 PM - 1:00 PM**

✓ Available: Everyone

**Fri 2/2**

**1:00 PM - 1:30 PM**

✓ Available: Everyone

🕒
2/2/2024

11:30 AM
▼

🕒
2/2/2024

12:00 PM
▼

All day

Time zones

↺
Don't repeat
▼

🔗
https://meet.cymbus.com/j?MID=28809652337
×

Search for a room or location

Teams meeting

☰
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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. 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

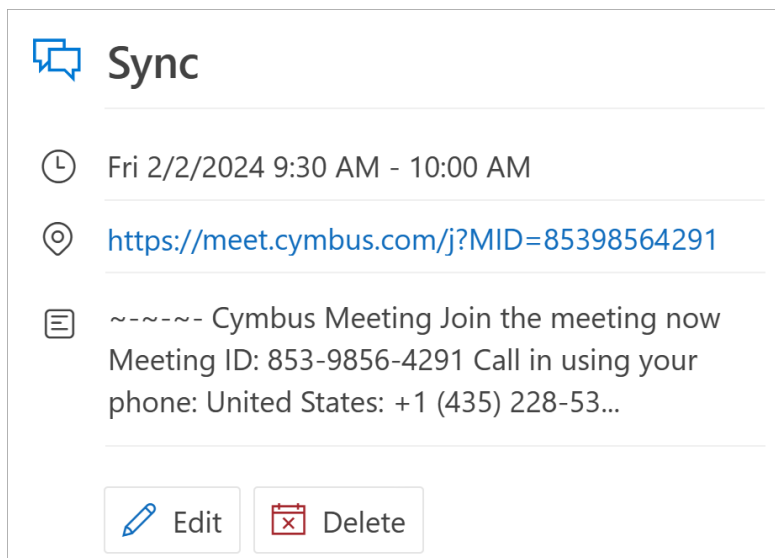
Use Outlook to change a meeting that was originally scheduled by Outlook. Do not use the Cymbus app to do so, because it does not notify other participants or sync your Outlook.



### 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**.



### Editing Recurring Meetings

- To enable/disable passcode or the waiting room or to change a passcode for a recurring meeting, apply the change to *the entire series*; these changes cannot be made to just one occurrence of the recurring meetings.
- When making a change to **This and all following events**, the meetings are updated correctly in both Outlook and Cymbus; however, the previous meetings in the edited series no longer appear in the Cymbus app. Use Outlook to view previous meetings if necessary.

## Cancel a Meeting

Outlook cannot sync with Cymbus for cancelled meetings. So if a meeting needs to be canceled, it must be deleted in both Outlook and Cymbus.

1. In Outlook, select the meeting you want to cancel.
2. Click **Delete** at the bottom of the pop-up, and then click **Send**.
3. Open Cymbus and select the meeting you want to cancel.
4. Cancel the meeting by clicking **⋮ More** then **Cancel**.

## Outlook Calendar Integration

Integrate your Outlook calendar with your Cymbus app to see all your Outlook meetings in the Cymbus app on your desktop and mobile devices. Consider using this feature if you are looking for an alternative to:

- Switching between Outlook and Cymbus apps to handle meetings to attend. With this integration, all your Outlook meetings appear in the Cymbus app, allowing you to launch a Microsoft Teams meeting directly from the Cymbus app.
- Copying your Cymbus meeting link manually to create a meeting in Outlook. This integration allows you to create a meeting directly in Outlook with the Cymbus meeting link automatically populated.

## Things You Should Know

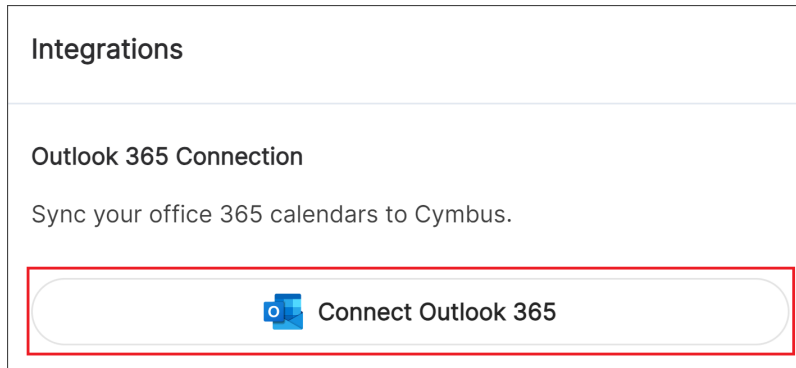
Before you enable the Outlook integration for Cymbus, here are a few things you should know:

- **Outlook to Cymbus.** Meetings created in Outlook are displayed in Cymbus but must be managed in Outlook.
- **Cymbus to Outlook.** Meetings created in Cymbus are displayed in Outlook. However, the Outlook calendar does not show Cymbus meetings you are **invited to** even if you have the Outlook integration enabled. Be sure to check the Cymbus app for these meetings.
- **Notifications.** Once the Outlook integration is enabled, both Outlook and Cymbus will notify you of upcoming meetings. With the Cymbus app, you can turn on/off *all* notifications; however, there is no way to turn off meeting-related notifications only.
- **Host Features.** Cymbus meetings created or displayed in Outlook do not include information for PSTN dialing, passcode, or waiting room hosted by Cymbus. To host a meeting with these features, it's best to use [Cymbus Add-in for Outlook](#) *instead of* the Outlook integration. If you choose to use both at the same time, you will end up with duplicate meetings in the Cymbus app.

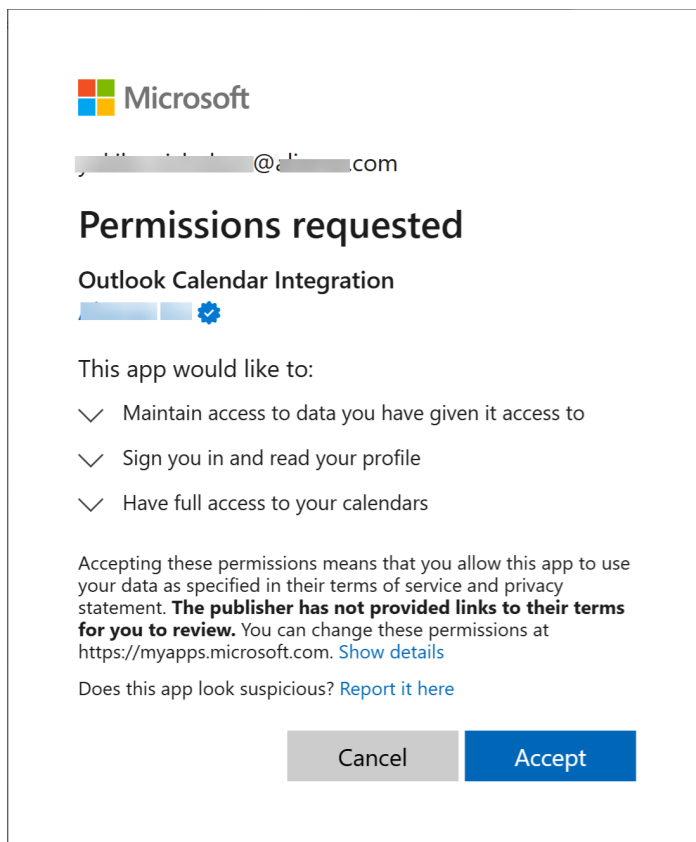
## Enable Outlook Integration

Use your Cymbus desktop app to set up the integration. After setup, Outlook meetings appear in all of your Cymbus devices including mobile apps.

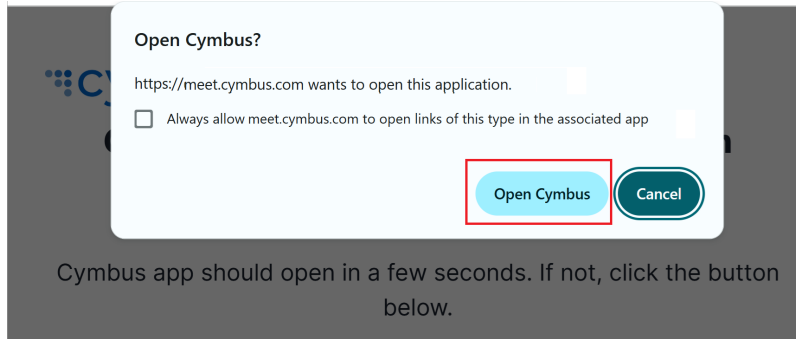
1. In the Cymbus desktop app, click your initials, then click **Settings > Integration > Connect Outlook 365**. It launches your default browser.



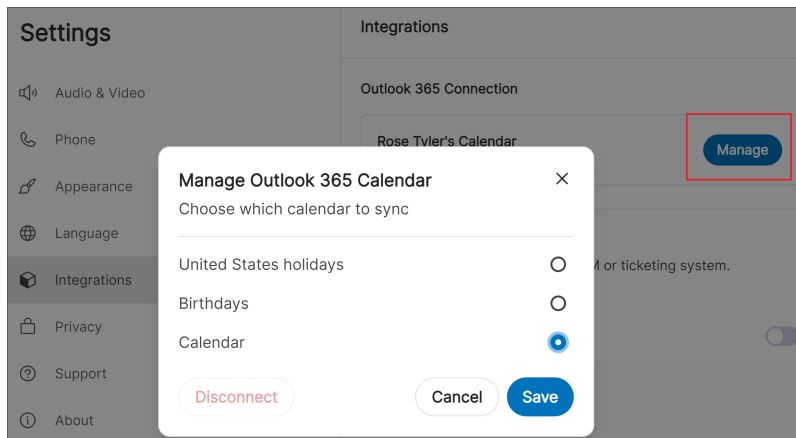
2. Use the browser page to log in to your Outlook account.
3. Review the permissions requested dialog and click **Accept**.



4. In the browser, click **Open Cymbus** to go back to your Cymbus app.

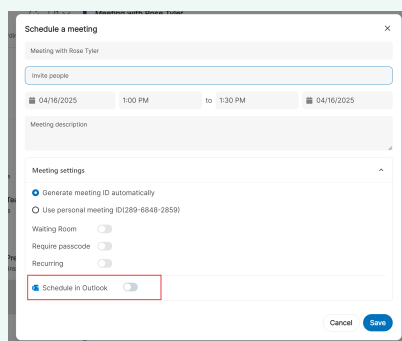


5. In the Cymbus app, click **Manage** and choose a calendar to sync, and click **Save**.



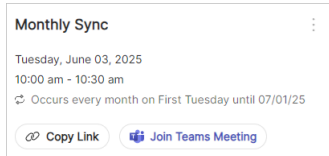
### Tip

To verify the integration is enabled properly, go to the **Meetings** tab and click **Schedule a Meeting**. You should see a **Schedule in Outlook** toggle at the bottom of the dialog.



## Join a Meeting from the Cymbus App

Outlook meetings hosted by Microsoft Teams appear in Cymbus with the **Join Teams Meeting** button, allowing you to directly launch the Teams meeting from the Cymbus app. To join a meeting, go to **Meetings**, select an upcoming meeting, and click **Join Meeting** or **Join Teams Meeting** on the right.



## Schedule a Meeting in Outlook with a Cymbus Meeting Link

The Outlook integration enables the Cymbus desktop app to create a meeting directly in Outlook with the Cymbus meeting link automatically embedded. This is an alternative for you if you manually copy and paste your Cymbus meeting link in Outlook.



### Change or Cancel

When you create a meeting this way, you must use Outlook to edit or cancel the meeting. The changes you made in Outlook will be synced to the Cymbus apps. Deleted meetings will just disappear from the Cymbus app.

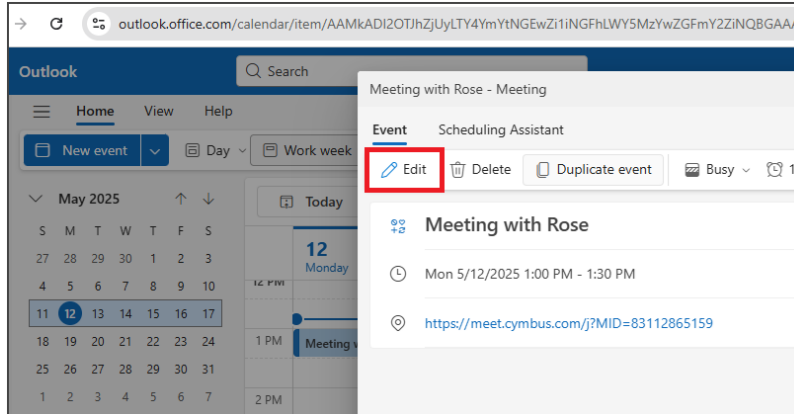
1. Go to the **Meetings** tab, select , and then **Schedule Meeting**.
2. Enable the **Schedule in Outlook** toggle at the bottom and click **Save**. It opens Outlook in your default browser.

Tip: Skip all the other fields because you'll set them in Outlook at the next step.

The screenshot shows the 'Schedule a meeting' dialog box with the following fields and settings:

- Meeting title: Meeting with Rose
- Invite people: Invite people
- Start time: 05/12/2025 1:00 PM to 1:30 PM
- End time: 05/12/2025
- Meeting description: Meeting description
- Meeting settings:
  - Generate meeting ID automatically
  - Use personal meeting ID(289-6848-2859)
  - Waiting Room:
  - Require passcode:
  - Recurring:
  - Schedule in Outlook:**  (highlighted with a red box)
- Buttons: Cancel, Save

3. Click **Edit** to add participants, set the meeting time, and set a reminder, then click **Save**. The meeting appears in both the Outlook calendar and the Cymbus app.



## Disable Outlook Integration

Once the Outlook integration is disabled, Outlook meetings are no longer visible from the Cymbus app. However, Cymbus meetings remain in your Outlook calendar and will not receive any updates even the host changes or cancels these meetings.

1. In the Cymbus desktop app, click your initials, then click **Settings > Integration > Manage**.
2. Click **Disconnect**.





### Clean Up Outlook

Manually remove Cymbus meetings from your Outlook calendar if necessary.

# Join Meetings

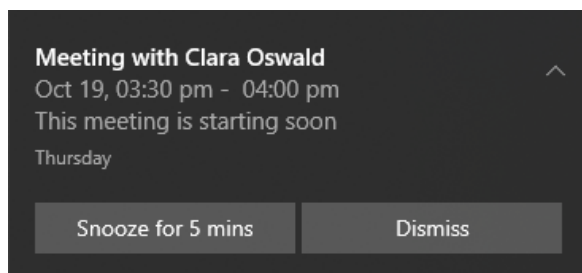
## Join a Meeting as a Cymbus User

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

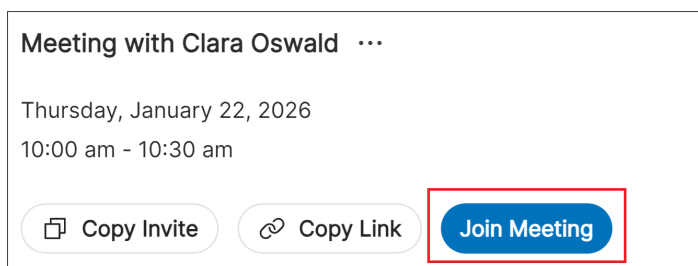
You can join a meeting in multiple ways: using meeting notifications, from the  **Meetings** tab, or a meeting link. You can also join a meeting by entering a meeting ID, [using a desktop browser](#), or [dialing in](#).

## 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**.

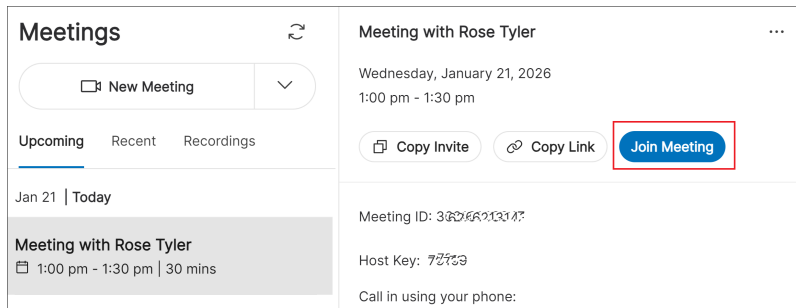


2. If prompted, enter the passcode, then select **Join Meeting** to proceed.
3. In the preview dialog, set meeting preferences such as mute, camera, and background effects.
4. When ready, select **Join Meeting**.

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**.

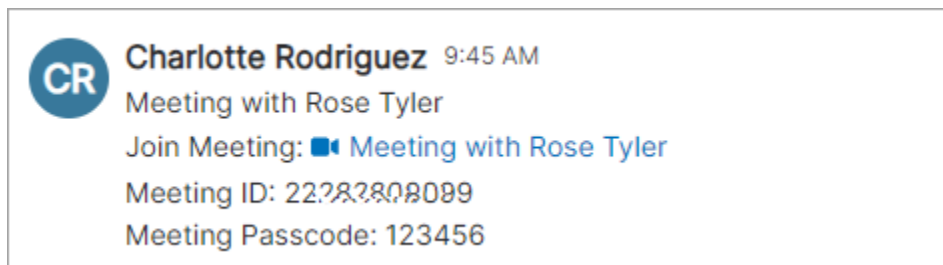


3. If prompted, enter the passcode, then select **Join Meeting** to proceed.
4. In the preview dialog, set meeting preferences such as mute, camera, and background effects.
5. When ready, select **Join Meeting**.

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 meeting preferences such as mute, camera, and background effects.
5. When ready, select **Join Meeting**.

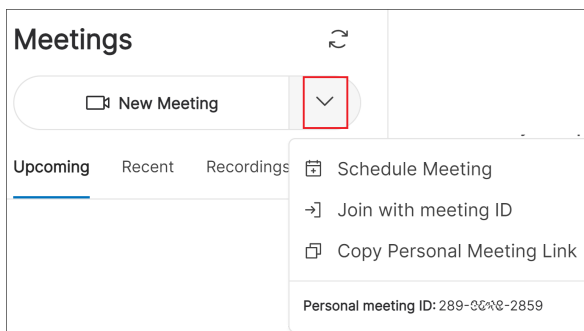
You are now in the meeting. See [Meeting Toolbar](#) for what you can do during a meeting.

## Join Using a Meeting ID

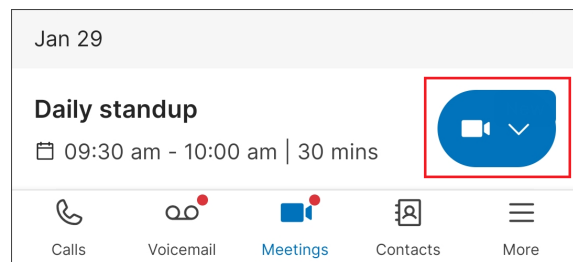
You can join a meeting by typing a Meeting ID. A meeting ID can be found in the meeting invite. Also take note of the passcode in the invite if enabled by the host.

Go to  **Meetings**, select  then **Join with meeting ID**. Enter the meeting ID and select **Join**.

### Desktop app:



### Mobile app:



## 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 (This article)
- [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

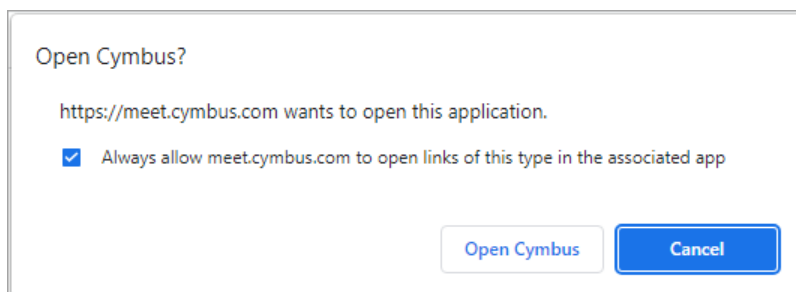
1. In the meeting invite, take note of the passcode. A passcode is included in the invite if enabled by the host.

1:1 Clara with Lucy  
 Join Meeting: <https://meet.cymbus.com/j?MID=4186210137>  
 Meeting ID: 4186210137  
 Meeting Passcode: 123456

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 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 to your device.
3. Launch the app, and select **Join a Meeting** on the login screen.

The image shows a login screen with the following elements:

- An input field labeled "Email".
- An input field labeled "Password" with a blue eye icon to its right.
- 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.

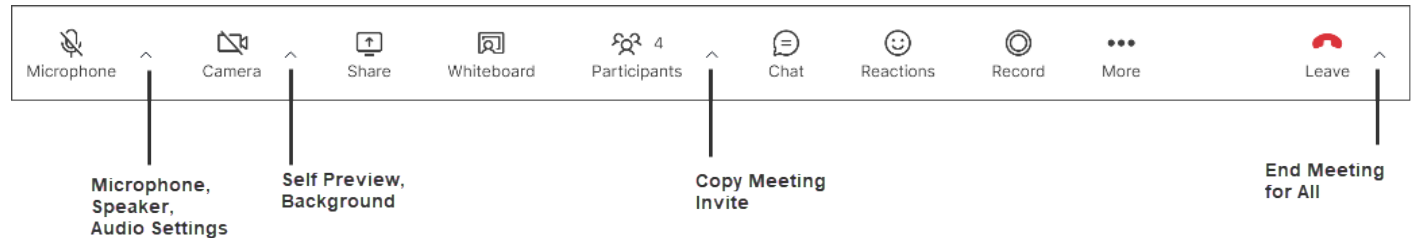
4. Enter the meeting ID, and your display name for the host and other participants to see. Enable **Remember me** on this device to save your display name and audio/video preferences for future meetings.
5. Select **Join a Meeting** to proceed.
6. If prompted, enter the passcode, then select **Join Meeting** 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.

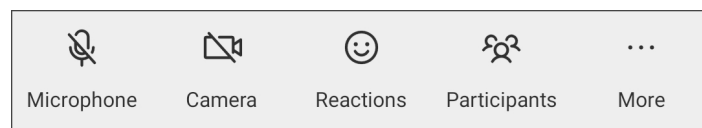
# Meeting Toolbar

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

## Desktop



## Mobile



## Options

- **Microphone.** 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 access host controls.
- **Chat.** Exchange messages with participants. See [Chat](#).
- **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 \(Desktop\)](#).
- **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 conserves battery life and data consumption. In the meeting toolbar, select **More** and enable **Turn Off Incoming Video**.

- **More > Meeting Diagnostics.** Monitor meeting quality with real-time network, audio, and video metrics.

## 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

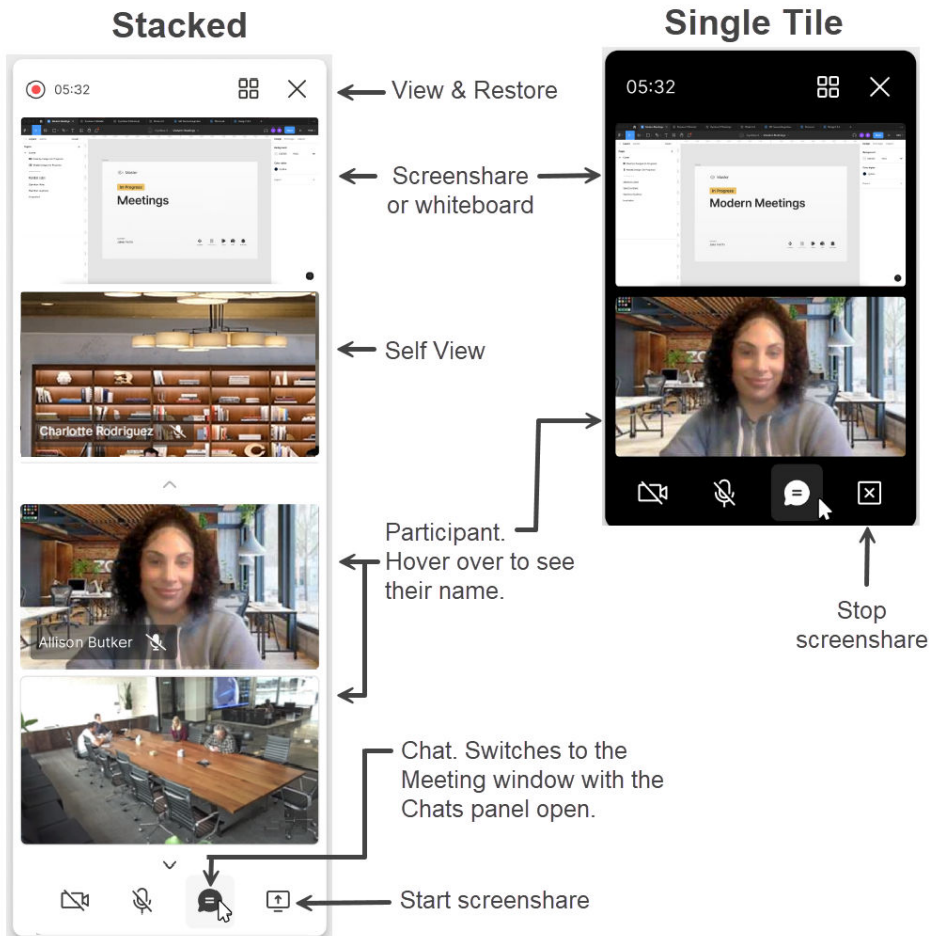
It's easy to change devices without leaving a meeting. For example, you started a meeting in the office on your laptop, but you need to leave. Join the ongoing meeting from your phone, then you can transfer the live meeting to your phone with one click.

## Picture-in-Picture (Desktop)

Anytime during a meeting, you can shrink the meeting window to a picture-in-picture (PiP) window, helping you stay engaged in the meeting while being able to use other applications on your desktop.

To switch to the PiP window, select **View > Picture in Picture**. The PiP window has two styles:

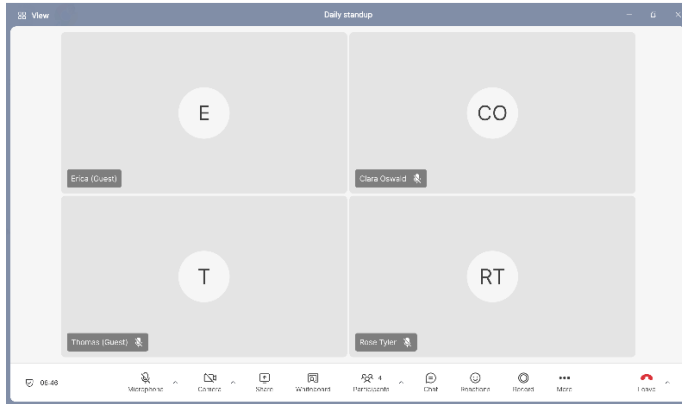
- **Stacked** displays a maximum of four tiles: screenshare, self view, and two participants. If there is no screenshare and self view is hidden, four participants will be displayed.
- **Single Tile** displays screenshare and one participant tile which automatically switches to the active speaker. There is no self view.



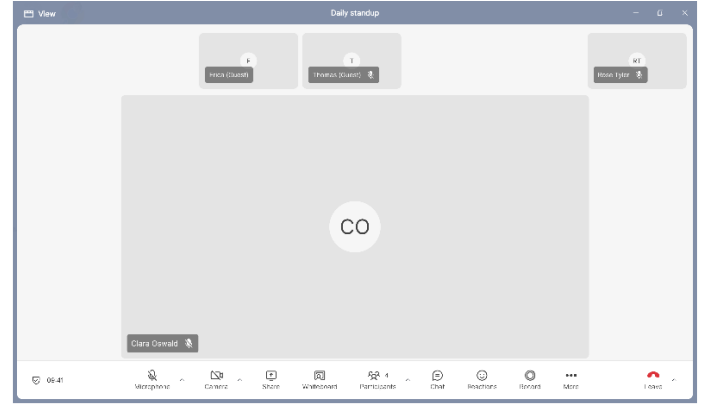
To expand to the full meeting window, select the **View** icon on the PiP window, and select **Restore Meeting Window**.

## Meeting Layout

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



Gallery View



Speaker View

- The Gallery view shows tiles of equal size in a 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.

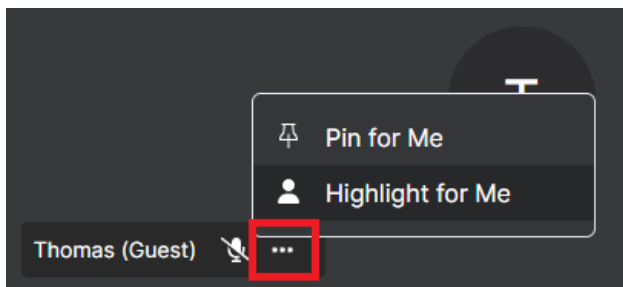
To change layout, select **View** on the Meeting window title bar, and select the desired style. This does not affect what other participants see. The **View** icon appears on the *left* corner on Windows and on the *right* corner on Mac.

## Self View

- **Hide Self View.** If you don't want to look at yourself during a meeting, select **View > Hide Self View**. On your mobile app, go to **More > 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.

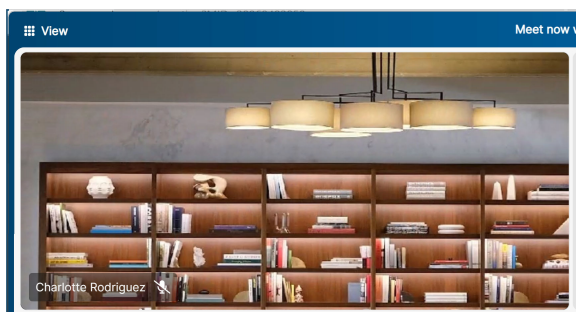
- **Highlight for Me.** Highlighted person appears in the big tile of the Speaker view and the shared screen moves to the first small tile in the carousel. You can also double click on a participant tile to highlight instead of selecting the menu. To display the shared screen in the big tile again, double click on the screenshare tile in the carousel, or hover over the participant in the big tile then select the three dots icon > **Remove Highlight**.

## Fill or Fit Tiles

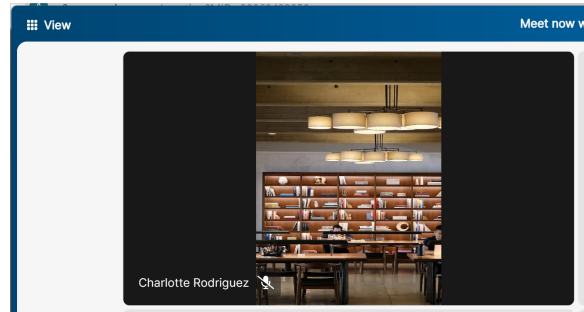
Change how video tiles are displayed in both Gallery and Speaker modes on your desktop app.

- Select **View > Fill Tiles** to crop video and remove the black background of mobile participants.
- Select **View > Fit Tiles** to see the whole video feed of participants, without cropping or zooming in.

### Fill Tiles



### Fit Tiles



## Carousel in the Speaker View

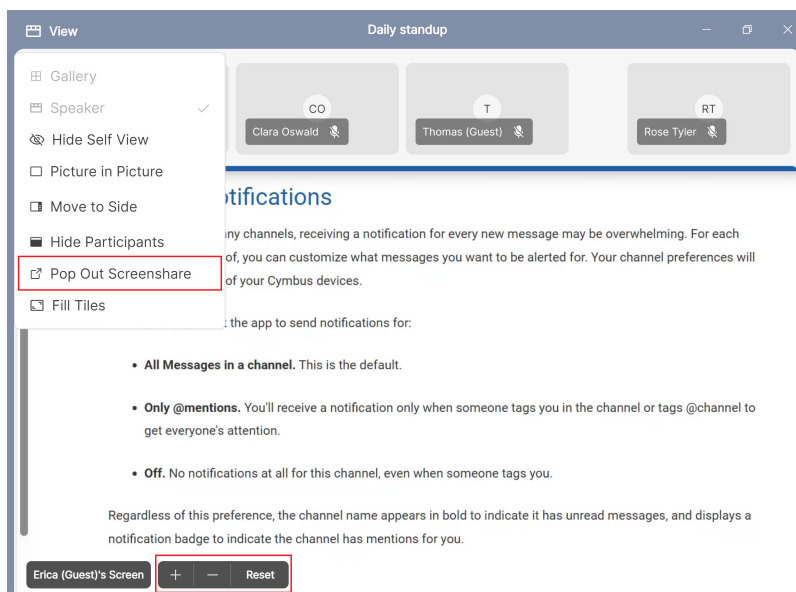
In the Speaker view, each participant has choices to hide or move the carousel of small video tiles as well as the self view tile.

- Move the carousel and 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, self view can be at the top or bottom of the right side. To move 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 self view completely. Select **View > Hide Participants**. To show it again, select **View > Show Participants**.

## Shared Screen

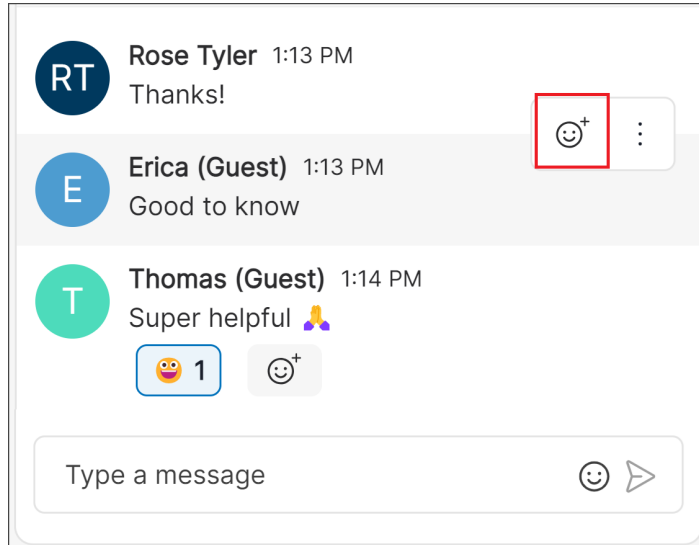
When someone starts sharing their screen, your meeting screen switches to the **Speaker** view, and the big tile shows the shared screen. Zoom in on the shared screen if it's too small. Desktop participants can pop out the shared screen into a separate window.

- 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 click **Restore Screenshare** on the pop-up title bar.

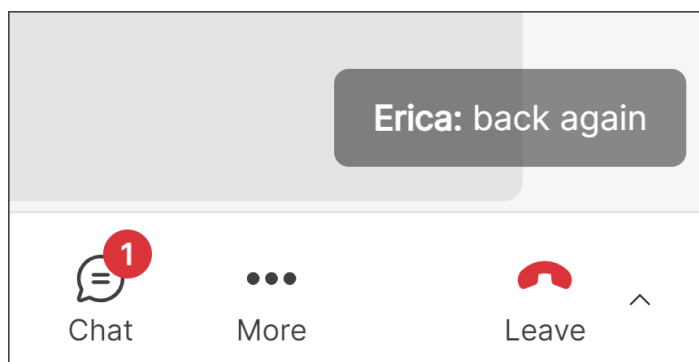


## Chat

**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.



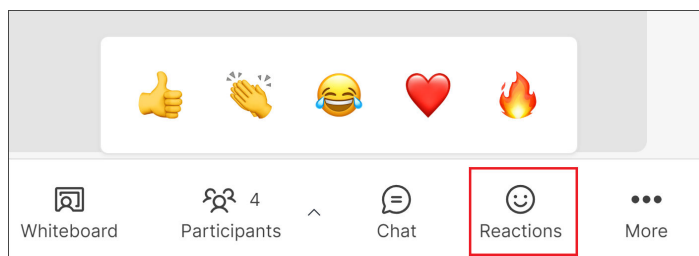
**Chat Notification.** You will see a red dot on the **Chat** button for new messages. New messages pop up on the bottom right corner of the browser. They disappear after a few seconds, but you can mute them completely by clicking **More > Mute Chat Notifications**.



## 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.

Select **Reactions** in the meeting toolbar and select the reaction to share. Meeting reactions appear in both the Gallery and Speaker layouts; however, they are not included in recordings.



## 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 joining a meeting in a browser will have access to everything; however, whiteboard sessions are view-only, which means they cannot participate in or download the session. See how to [change the layout](#) or [share your screen](#) using a browser.



### 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.

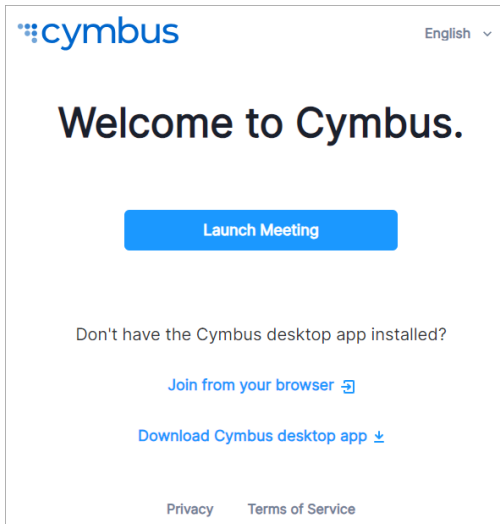
## Join Using a Browser

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

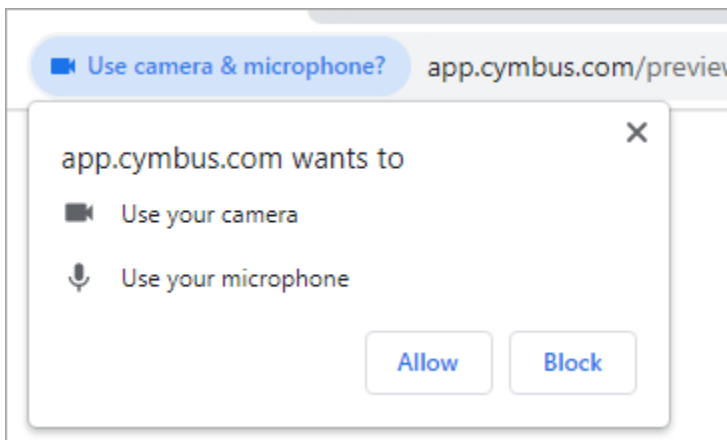
1. In the meeting invite, take note of the passcode. A passcode is included in the invite if enabled by the host.

1:1 Clara with Lucy  
 Join Meeting: <https://meet.cymbus.com/j?MID=4186210137>  
 Meeting ID: 4186210137  
 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, click **Join Meeting**. You are in the meeting.

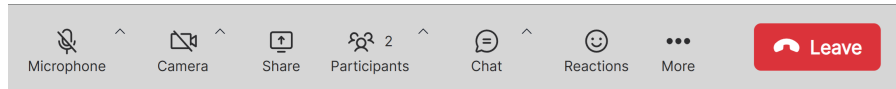


### Do Not Refresh Browser

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:



- **Microphone.** Mute your voice, enable noise suppression, and change the microphone and speaker.
- **Camera.** Click the arrow beside the Camera icon to choose a background or add blur during a meeting.
- **Share.** Share your screen. See [Share Your Screen Using a Browser](#).
- **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.
- **Chat Notification.** You will see a red dot on the **Chat** button for new messages. New messages pop up on the bottom right corner of the browser. They disappear after a few seconds, but you can mute them completely by clicking **More > Mute Chat Notifications**.
- **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.
- **More > Meeting Diagnostics.** Monitor meeting quality with real-time network, audio, and video metrics.

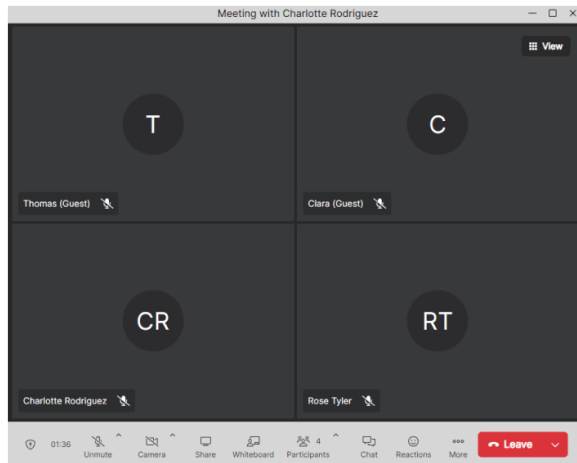


### Zoom In on Shared Screen

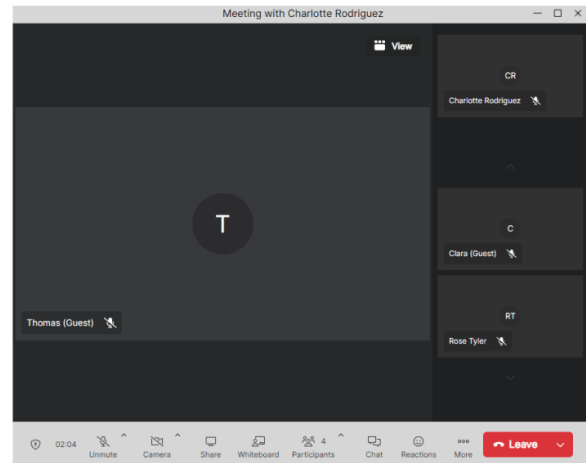
Looking at a screen that's too small? You can zoom in. Use the **+ / - / Reset** buttons next to the presenter's name in the bottom left of the screen. Alternatively, users can use a mouse or trackpad to zoom in and out.

## Meeting Layout

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.



Gallery View



Speaker View

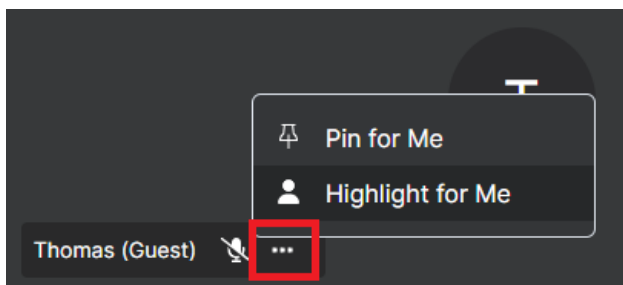
- The Gallery view shows tiles of equal size in a grid.
- The Speaker view shows one big tile along with a carousel of small tiles at the top or on the right. The big tile displays screenshare, or each user can choose a participant to show in the big tile by using the **Highlight for Me** menu.

## Self View

- **Hide Self View.** If you don't want to look at yourself during a meeting, select **View > Hide Self View**. On your mobile app, go to **More > 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 the three dots icon > **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 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, self view can be at the top or bottom of the right side. To move 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 self view completely. Select **View > Hide Participants**. To show it again, select **View > Show Participants**.

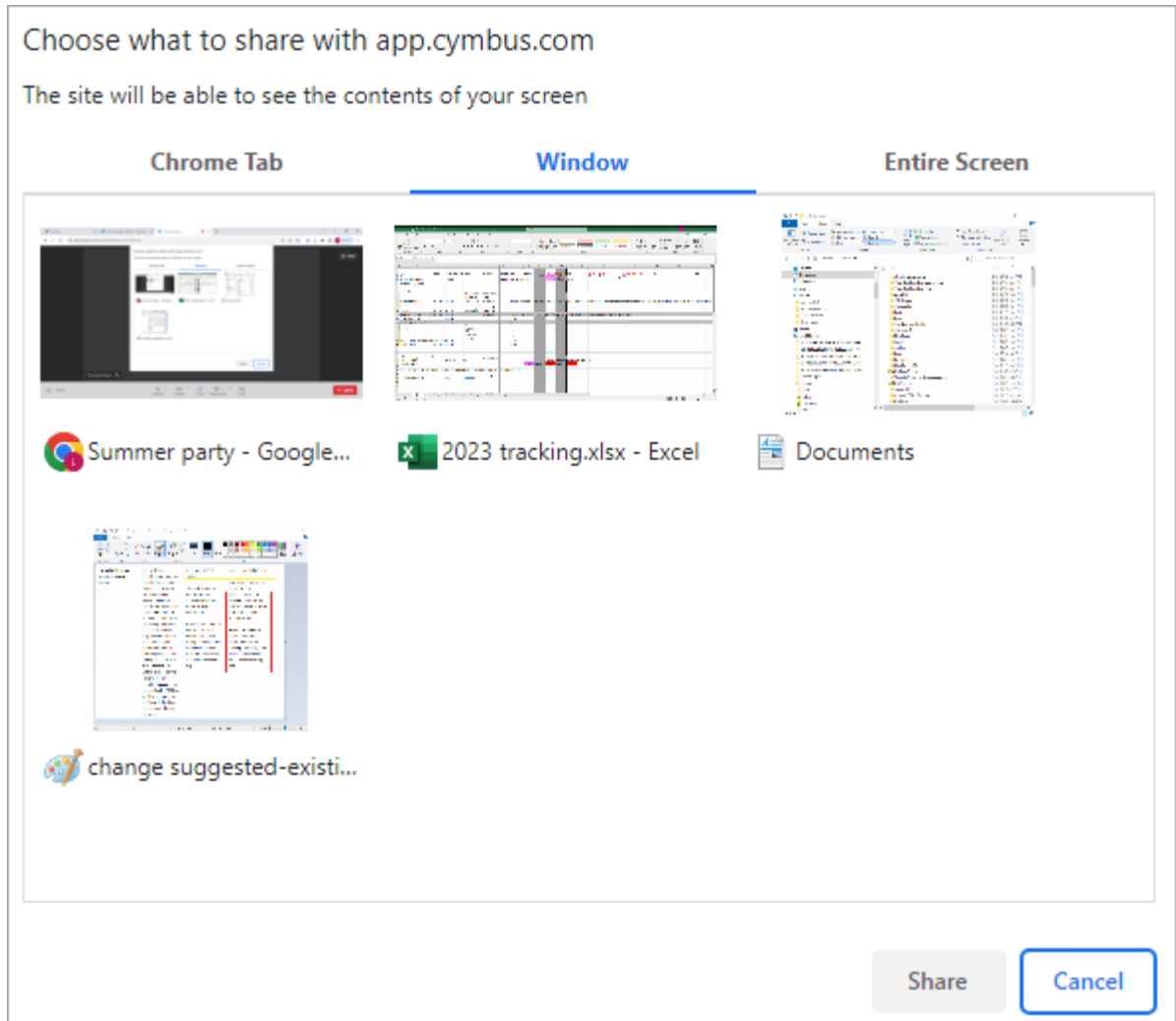
## Share Your Screen Using a Browser

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

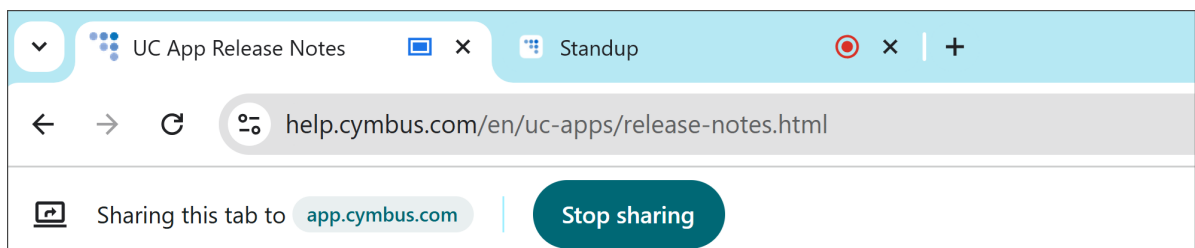
On Mac, you must give your browser the permission to share your screen. It is recommended to do so *before* you join a meeting because when you are using a browser, you need to leave the meeting in order to give the Screen Recording permission, then join back to the meeting to start screenshare. To give 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:

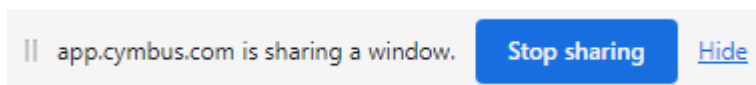
1. Select Share in the meeting toolbar.
2. Choose a browser tab, a window of a specific application, or an entire screen to share.



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:

- 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 UC 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 UC 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.



### Muted Upon Joining


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 UC 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.

# Troubleshooting and FAQ

## Check for App Updates

We recommend checking for app updates when troubleshooting is required because the most recent app version may include bug fixes.

- **Windows:** Open the Cymbus app, and click **Menu > File > Check for updates**.
- **Mac:** Open the Cymbus app, go to the menu bar, and click **Cymbus > Check for updates**.
- **Mobile (iOS or Android):** Go to the app store app on your device, and check if updates are available for your Cymbus app.

## Contact Customer Support

If you have an issue with the app, contact Customer Support at your service provider.

When asked to send a diagnostics log, perform the following steps:

1. Select your initials in the bottom left corner of the desktop app. On the mobile app, your initials appear in the top left corner.
2. Go to **Settings > Support > Send Diagnostics**.
3. Select **Send**.
4. Pass the Confirmation ID to the support representative. They will get back to you with updates.

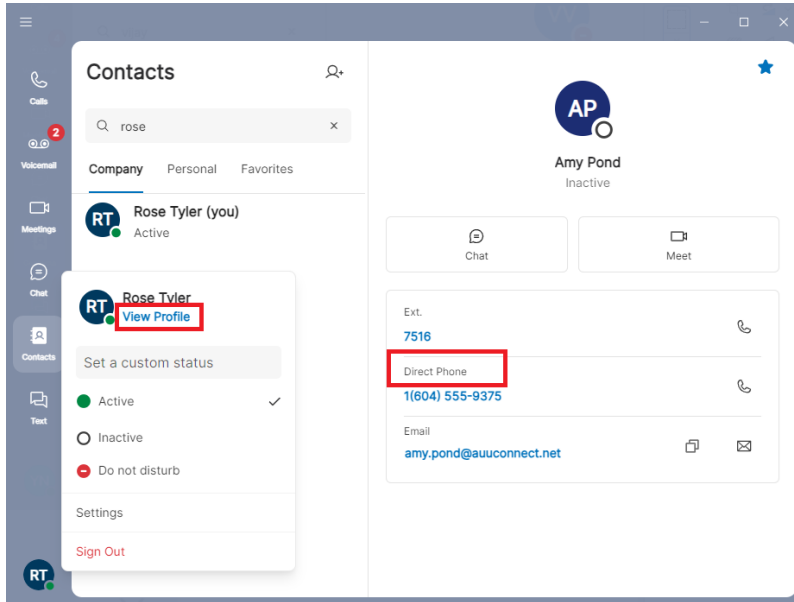
## Frequently Asked Questions

### Q. What is my phone number?

A. The app displays up to four direct phone numbers assigned to you and your colleagues. There are multiple ways to find your own number:

- Select your initials and select **View Profile**.
- On the **Contacts** tab, go to the **Company** list and select the entry with your name.
- On the **Chat** tab, hover over your name or initials to reveal your contact card to see your direct number or extension.

If contact details do not show the **Direct Phone** field, that means no direct number is assigned to the contact. The contact can be reached via their extension.



## Q. How does my language selection affect my meeting bridge?

For example, if the app is set to Spanish and when I host a meeting on my bridge, do participants in my meeting hear the prompts such as "meeting is now recorded" in Spanish?

A. No, participants will hear meeting prompts in the language they selected in their app or device.



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