Installing, configuring, and using SessionCloud Softphone for MacOS
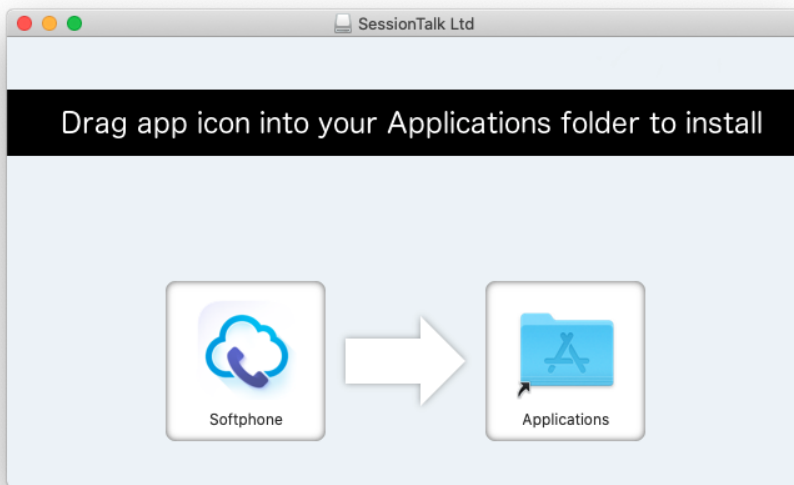
INSTALLATION AND CONFIGURATION

Download "SessionCloud SIP Softphone" for Apple MacOS from this link:
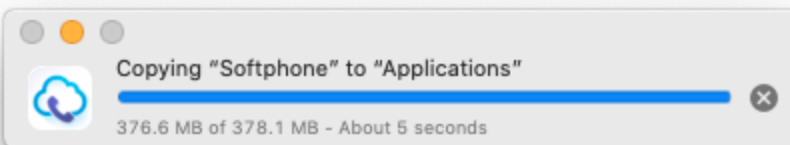https://mac-softphone.s3.eu-west-2.amazonaws.com/Softphone.dmg

One the installation file is downloaded, double-click on "Softphone.dmg" from "Downloads"
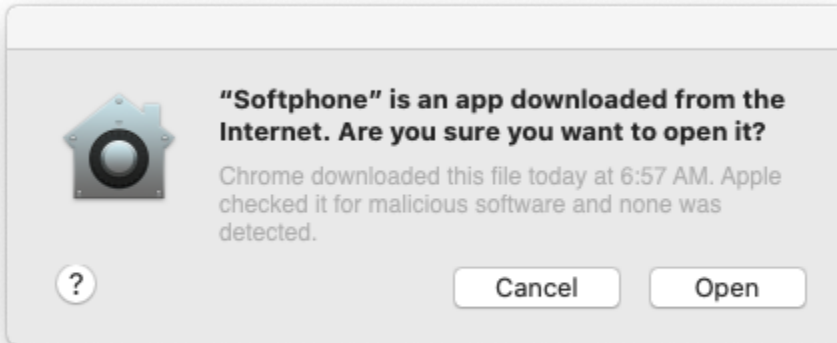
You should see this window:

Drag the "Softphone" icon to the "Applications" icon to install. You should see the following window:
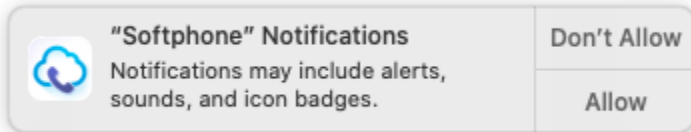

After installation, "Launchpad" or "Finder" and double click on the "Softphone" icon:
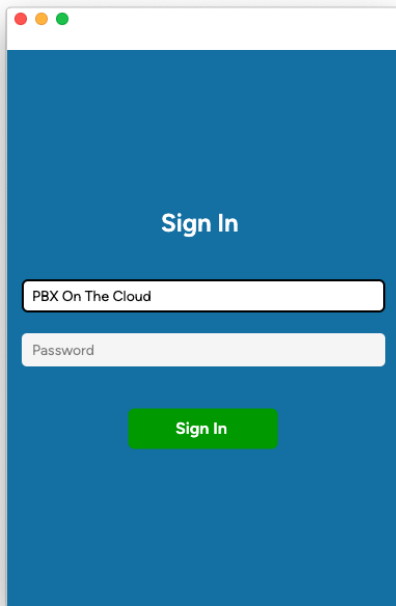
Click on "Open" on the next screen:

Click on "Allow" to enable "Notifications":

Once the application starts, enter "PBX On The Cloud" on the Username line and leave "Password" blank. Click on "Sign In":

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Fill the following fields based on the information provided by PBX On The Cloud User Guide document:

Username: Your extension or direct phone number.
Password: Your extension or direct phone number password. This is provided in the User Guide PBX On The Cloud sent you. Be very careful to type the password correctly to avoid blocking your Softphone. (You can contact your PBX On The Cloud representative for help if this happens).
Domain: It will be provided in your User Guide and it can be s1 or four letters corresponding to your Company Code followed by .pbxonthecloud.com, like s1.pbxonthecloud.com or xyyy.pbxonthecloud.com

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You should be seeing the following screen showing an antenna in GREEN, indicated that your service is active. If this icon is RED, you will need to edit/review your settings by selecting your account as indicated on page 5.   Check the Username, Password and Domain. If the antenna doesn't turn GREEN, try deleting the account and create it again.
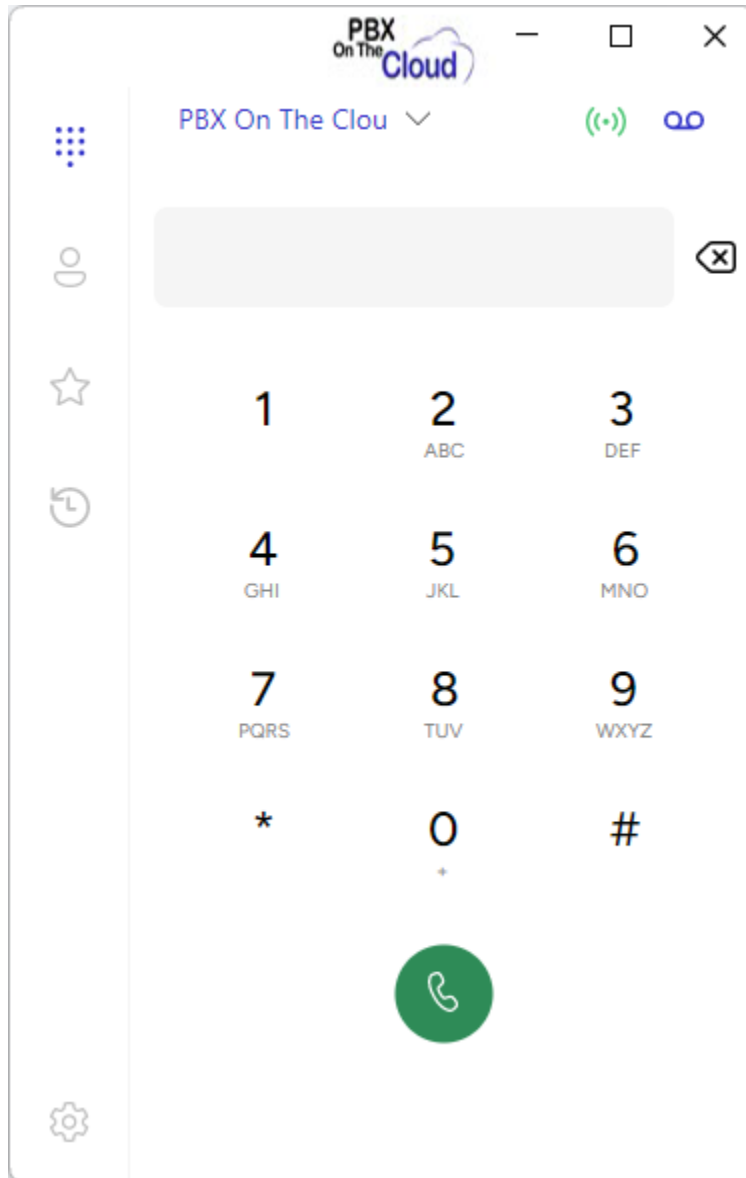
Dial *65 followed by the green button at the bottom to hear your own phone number or extension.
Dial *43 to make an echo test where everything you say will be repeated back to you.

IF YOU NEED TO EDIT, ADD OR DELETE OTHER ACCOUNTS

Click on gear:

Then click on "Accounts". To add click the "+" icon
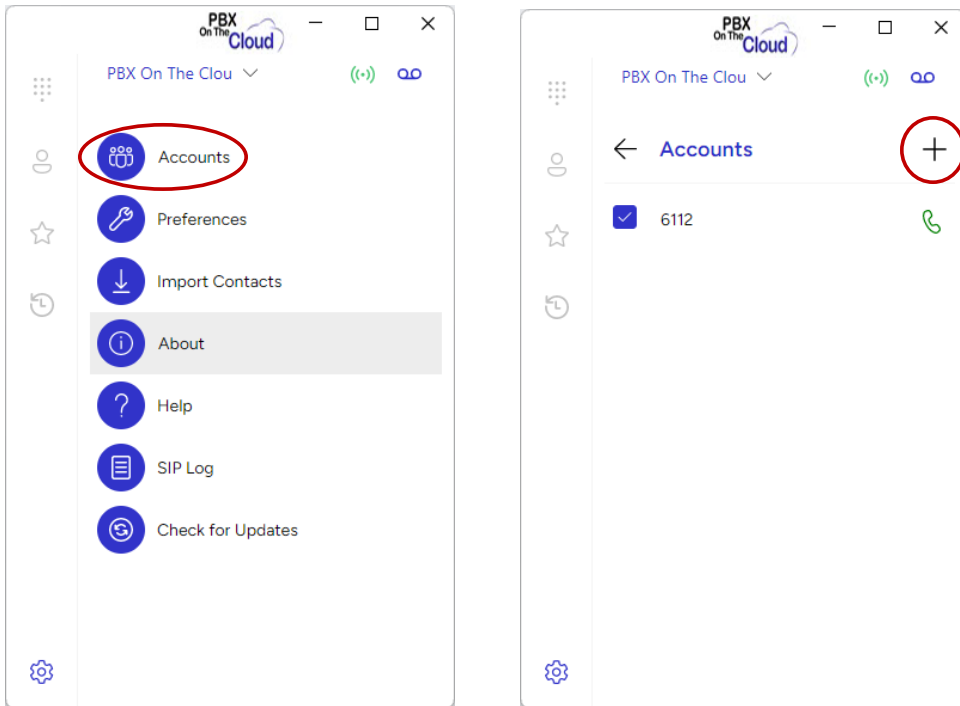
Fill Username, Password and Domain following the same steps as in page 3 and click on the icon to save it. You should see all the accounts.

To delete an existing account, click on the checkmark to turn the account off and then right-click with your mouse on the account and select "Delete" and select that.

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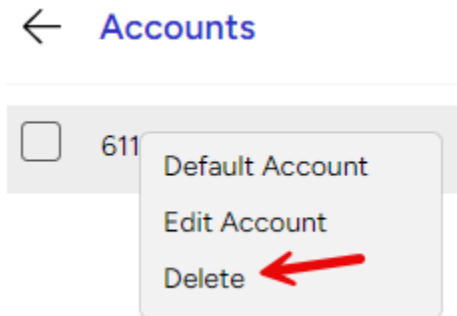
Go back to the main screen clicking on the "<- SIP Accounts" icon: ← Accounts and cllick on the ⋮⋮⋮ icon to go back to the keypad.

To switch between numbers, extensions or accounts, click the ⌄ icon and select the account you want to dial from. All registered accounts will receive calls.

If you need to **automatically start your SessionCloud Softphone every time you turn on your PC**, click on the ⚙ icon, select "Preferences" and put a checkmark on the "Launch On Start" field. Then save clicking on the ✓ icon, then click on the ⋮⋮⋮ icon to return to the dialer.

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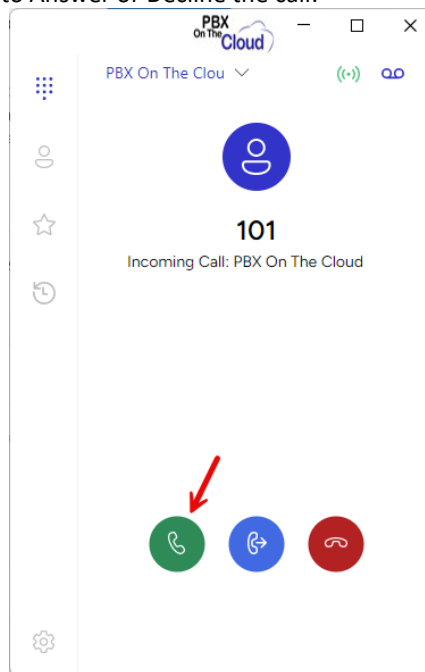
USING THE SOFTPHONE

ACCEPTING OR REJECTING A CALL

You can Answer or Decline incoming calls just by clicking on the desired option when the call comes through. Rejecting a call will forward it to your voicemail.
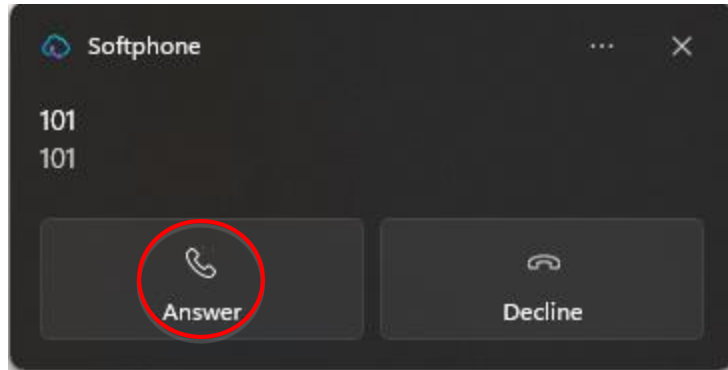
You can also cllick on the GREEN or RED icons to Answer or Decline the call:

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MANAGING A CALL

Use the keypad to enter the number you wish to dial and then press [phone icon] , when the call is established, you will see the following options:

To mute/unmute your microphone, press: [microphone icon]

To toggle between Speaker or Headset mode: [headset icon]

To access your keypad click: [keypad icon]

To place the call on hold, press: [pause icon]   To resume the call press the same button.

To transfer a call, press [transfer icon] , then type the number or extension you want to transfer to on this field:

[_____]   [transfer icon] and then press the [transfer icon] icon to transfer.

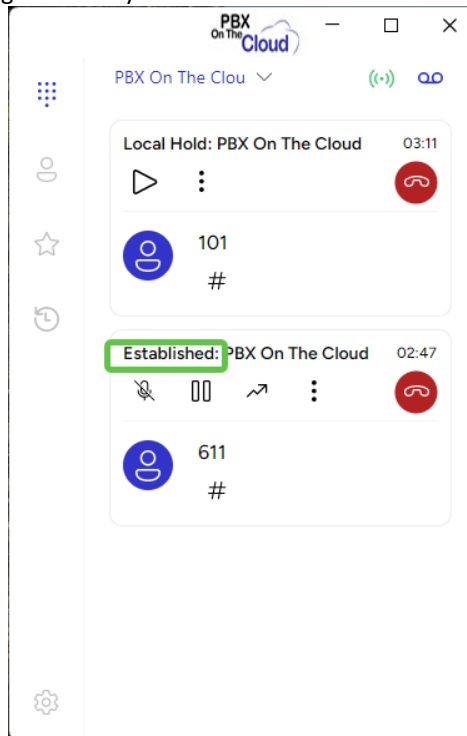Tel: +1 (346) 444-3555 | Fax: +1 (281) 617-4258 | www.pbxonthecloud.com
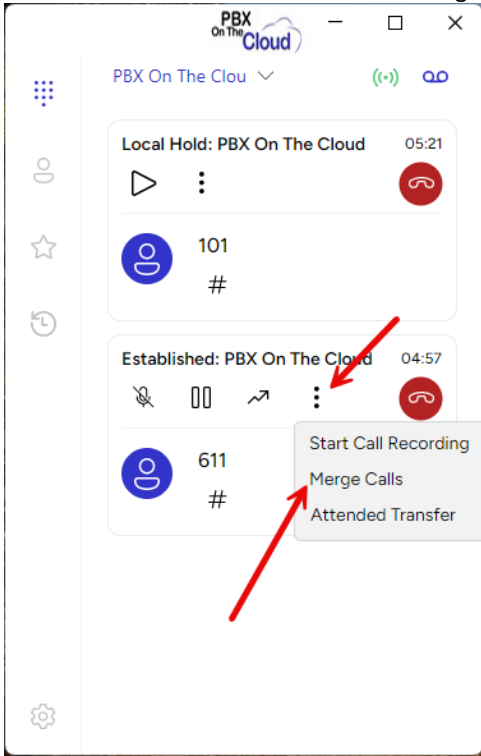
If you are on a call and someone calls you and you want to Merge the calls calls, press the GREEN answer button on the Incoming Call section:
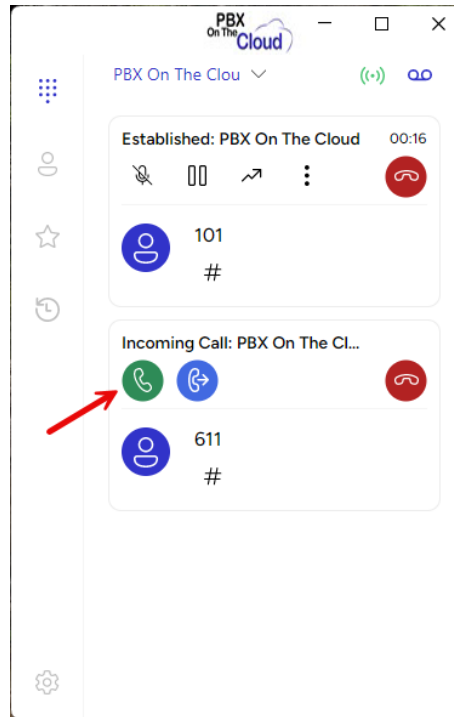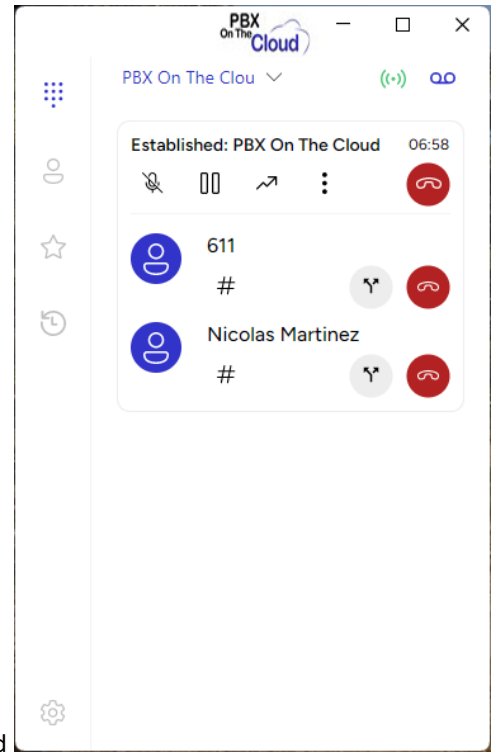

You should be talking to the second incoming call. And you should see this screen:

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Then click on the ⋮ icon and select "Merge Calls"

and you shouldhave the 2 calls merged

You can finish the merged call by pressing the first icon.   Or you can end any of the two callers clicking on the second or

third icon.

To change your Microphone or Speakers, click on the icon and select the desired ones.

To end the call, press:

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TO CHECK VOICE MAIL (And change you initial voice mail password):

To access your voice messages you have to dial *97 as there is no Voicemail button designated just for this purpose.
You will be asked for your extension voice mail password followed by the # sign (1234# by default). You should change this voice mail password the first time you use the system. Hear the instructions to do it.

TO ADD CONTACTS:
Click on the "Person" icon on the left and then on the "Person+" icon on the right as indicated below. If you want to mark that contact as a Favorite, select the ☆ icon. To dial a contact, just click on the ☎ icon to the right of it.
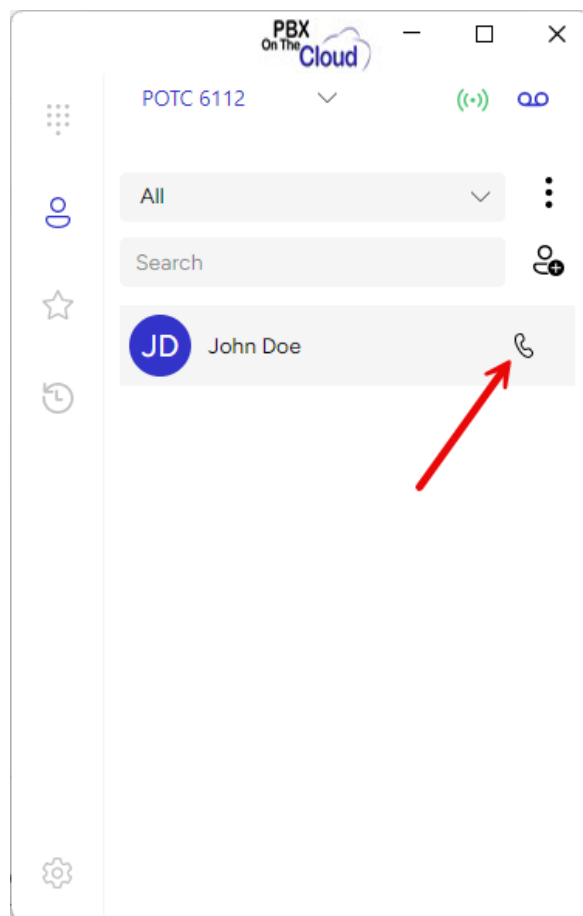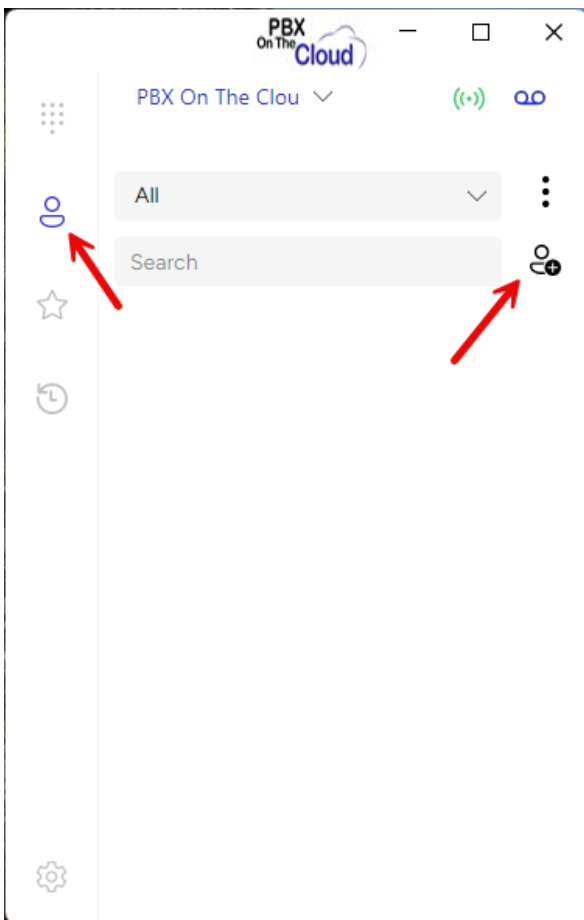
To delete a contact, just right-click on it and select "Delete Contact".

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TO SEE A CALLS HISTORY:

Click on the icon:

A list of your calls will apprear.

Clicking on any of the lines will provide additional information on date and time of the calls and the icon will allow you to dial that number.

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