



Cloud Phone Quick Start Guide

SIGN IN TO YOUR ACCOUNT

1. Go to www.cloudphone.com
2. Click **Sign In** at the top of the page
3. Enter your mobile number and password
4. Click **Sign In**

FORWARD YOUR BUSINESS NUMBER

Make sure you never miss an important call by forwarding your calls to numbers (cell, home, etc.) where you can be reached. The numbers can be set to ring simultaneously or in order.




1. Sign in to your account
2. Click on your extension

NOTE: The mobile number you entered upon sign up is automatically set as your call forwarding number.


CALL ROUTING
Configure where and how your extension routes calls.

Ring Phones:

In Order
 Simultaneously
 Send Calls to Voicemail

My Numbers	Label	Ring For	
Mobile App		15 Sec	<input checked="" type="checkbox"/> 
1858-442-4039	Mobile	15 Sec	<input checked="" type="checkbox"/>  


[Add a Number](#)

3. Confirm that the number entered is correct.
4. If you have installed and logged in to the mobile app, enable the mobile app to ring.
5. To edit the number or change call options, select the settings icon.  A new window will appear to allow edit of your call forwarding label (mobile, cell, office, etc.), phone number, ring duration and Incoming call display. The **Incoming Call Display** determines what information you see on your screen when a customer calls your business number. Options are:
 - i. **Incoming Caller ID** will display the phone number or contact name (if available) of the person calling.
 - ii. **Called Number** will display the number you are calling.

7. Click **Save**.
8. If calls should be forwarded to more than one number, click “**Add a Number**”

CONFIGURE YOUR CALL SETTINGS

Define how your incoming calls should be handled.

1. [Sign in to your account](#)
2. Click on gear icon next to your extension. 
3. Click **Call Settings** on the left navigation or scroll down to call settings.

CALL SETTINGS

Configure how Cloud Phone handles your incoming calls:

Incoming Calls:

- Announce answer options when receiving an incoming call
- Ask incoming callers to record their name
- Connect directly to forwarding numbers

Outgoing Caller ID:

My Number (+1 949-800-8989) 

SMS Sender ID:

+1 949-800-8989 

4. Enabling **Ask incoming callers to record their name** will prompt unknown callers to state their name before the call will be connected. The caller’s name is then announced to you to give you the option to take the call or send it to voicemail. This feature is a great way to prevent dealing with unwanted callers.
5. Enabling **Announce answer options when receiving an incoming call** will give you the option to connect the caller or send the caller to voicemail. Disabling will automatically connect the call when answered.
6. **Connecting directly to forwarding numbers** will connect you to the caller
7. Click **Save Changes**.

NOTE: ‘Play Answer Options for Reach Me Numbers’ should be enabled if you want unanswered calls to go to your [extension's](#) voicemail greeting. Disabling it will send callers to the voicemail greeting of the forwarded number, which may be a personal voicemail greeting.

UPDATE NOTIFICATIONS

Never miss an important message! Be notified via email or SMS for voicemails or recorded calls. The notification will include a link to access the audio file

1. [Sign in to your account](#)
2. Click the name on the extension.
3. Click **Notifications** from the Left navigation.

NOTIFICATIONS

How would you like us to notify you when you receive messages?

Send email notifications to:

Send SMS notifications to:

Notification Type	Email	SMS
Call Recording	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Incoming Fax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Voicemail	<input checked="" type="checkbox"/>	<input type="checkbox"/>

5. Enter the desired email address for receipt of notifications.
6. Confirm or edit the mobile number for receipt of SMS notifications.
7. Enable notifications by checking the applicable box for the desired notification type and the method you wish to receive them.
8. Click **Save Changes**

NOTE: By default, email and SMS notifications for voicemails and recorded calls are enabled and will be sent to the mobile number and email address you provided upon sign up.

VOICEMAIL SETTINGS

Create a personal voicemail greeting. This is the greeting a caller hears if they are sent to voicemail after dialing your extension. You can also opt to have your voicemails transcribed to text by enabling voicemail transcriptions.

1. [Sign in to your account](#)
2. Click your extension.
3. Click **Voicemail Settings** from the left navigation.

VOICEMAIL SETTINGS

Configure how you'd like your voicemail to work:

Voicemail Features	Enable
Voicemail Transcription	<input checked="" type="checkbox"/>

Record a Personal Voicemail Greeting

[Record One Now](#) [Make Active](#)

4. Click **Record New** to create a personal voicemail greeting.
5. You will be prompted to a new window for a mobile number to receive a callback.
6. Confirm the number is correct and select **Call Me**.
7. You will receive a call that will provide audio prompts to complete the voicemail greeting.

RECORD NEW VOICEMAIL

We'll call you so you can record your outgoing message.

Number to Call:

[Close](#) [Call Me](#)

8. Your recorded greeting will automatically be uploaded and enabled.
9. Click **Enable** to have voicemails automatically transcribed to text.
 - i. [Notifications](#) must be enabled to receive the voicemail transcriptions via email or SMS.
10. Click **Save Changes**

ADD AN EXTENSION

1. [Sign in to your account](#)
2. Select **Add an Extension**.
3. Select **Person**, for *Is this extension for a person or department?* to give the user a login to manage their extension settings. This requires entry of a mobile number and will send an invite to the user. Otherwise select **Department**.
4. Enabling admin privileges will give the user full access to add, edit, or remove any information. A user without admin privileges can only manage their information.

ADD AN EXTENSION

Is this extension for a person or department?

Person Department

Will this user be an Admin?

Admin privileges give the user full access to add, edit, and delete all information on the account. A user without admin privileges can manage only their own information.

Yes No

What is the extension name?

First Name or Department Name

What is the extension last name?

Last Name or Description

What's their Mobile Number?

+1 Mobile Number

What extension would you like to assign?

102

How would you like to send the invitation?

SMS Email Both

Invite User!

Cancel

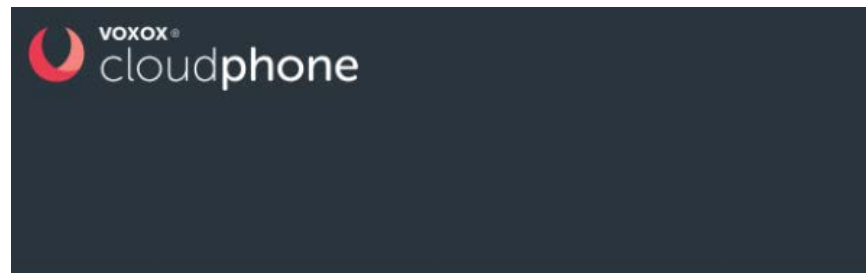
5. The first name entered will be used in the extension's default voicemail greeting.
6. The user's mobile number is required to login to their account and is the number calls are forwarded for the extension.

ADD AN EXTENSION (Continued)

7. The extension number defaults to the next available sequential number but can be edited.
8. An invite with a link to login to their account can be sent via SMS, email, or both.
9. Click **Invite User**
10. The invite will show as pending until the invitee accepts the invitation and completes the registration process.

ACCEPT AN INVITE

1. New users will receive an invite with a link to complete the setup.
2. Click on the link provided in the email or SMS invite notification.
3. If necessary, edit any defaulted information.
4. Provide your email address and password. This email address will be used to receive notifications.
5. Click Finish.
6. Your account creation is complete and you are signed in to Cloud Phone
7. You can now [CONFIGURE YOUR CALL SETTINGS](#)



FINISH ACCOUNT CREATION

First Name

Last Name

Email Address


Password

Confirm Password

Finish

NOTE: Don't forget to add this extension to your auto attendant and update the company greeting if applicable.

DELETE AN EXTENSION

1. [Sign in to your account](#)
2. Hover over the extensions you would like to delete
3. Click the delete icon 

NOTE: Don't forget to remove this extension from your [auto attendant](#) and update the [company greeting](#) if applicable.

SETUP THE AUTOMATED ATTENDANT

The automated attendant is a virtual receptionist that answers calls professionally and routes callers to the appropriate place based on a menu selection. The automated attendant can route callers to an extension, another phone number, a recorded message such as business hours or directions or directly to voicemail. You can [bypass the auto attendant](#) and send calls directly to you, if desired.

NOTE: Upon sign up, a default automated attendant menu was created to have callers dial 1 to reach at the mobile number you entered at sign up, dial 9 to leave a voicemail or press star (*) to repeat the menu.

1. [Sign in to your account](#)
2. Hover **Company** from the top menu and Select **Auto Attendant**
3. Click or scroll down **Menu Actions**
4. To create a new Menu option click **Add** next to the number you wish to update.
5. To edit an existing option, first delete the existing option and then click **Add**.

MENU ACTIONS

You can customize your menu interactions with the options below. Just click 'Add' for the phone input that you would like to assign a new action to. Changes will take effect immediately and you can always dial your company's phone number, 949-800-8989, to test your new actions.

1	Connect to Ed Mallory	Delete	7	Add
2		Add	8	Add
3		Add	9	Forward to Voicemail
4		Add	*	Press to repeat menu
5		Add	0	Add
6		Add	#	Add

SETUP THE AUTOMATED ATTENDANT (Continued)

1. A dropdown menu will display routing options to include [previously entered extensions](#).
2. To route to a menu option to a previously entered extension, select the desired extension from the drop down menu.
3. To route to a specific phone number, select **Connect to Phone Number** and you will be prompted to enter the desired phone number.
4. To play a pre-recorded message such as office hours or directions select the desired "Play Recording" option.
 - i. **"Call-to-record"** will prompt for a mobile number where you will be called and walked through the call recording.
 - ii. **"Text-to-speech"** will play a digital recording of the text you type.
 - iii. **"Upload Audio"** will allow you to upload a pre-recorded audio message.
5. Select **Connect to Voicemail** to send a call directly to the company Voicemail.
6. Click **Save**
7. After you have set up your auto attendant be sure to [Edit your company greeting](#).

CREATE NEW ACTION

Select Action:

- Connect To Extension
- ✓ Connect To Phone Number
- Connect To Voicemail
- Play Recording: Call-to-Record
- Play Recording: Text-to-Speech
- Play Recording: Upload Audio

Phone Number

Close

Save

CREATE NEW ACTION

Select Action:

Play Recording: Text-to-Speech

This text will be read to the caller and they will be returned to the main menu once it finishes.

Close

Save

EDIT YOUR COMPANY GREETING

Your company greeting acts as a virtual receptionist that answers your business calls professionally and provides call routing options to your customers.

NOTE: Upon sign up, a default greeting was automatically created for you based on information you provided when you created your account.

1. [Sign In your account](#)
2. Click **Company** from the main menu and choose **Auto Attendant**.
3. Review the default digital text to speech greeting by clicking **Listen** to determine if it meets your needs.
4. If auto attendant menu options have been added or edited since sign up, the company greeting will need to be updated to reflect those changes.
5. If using the **Digital Greeting** option, simply type in the desired text, click **Save** and then **Listen** to ensure the greeting is correct.
6. Ensure to make this your active greeting as indicated by the green dot.

COMPANY GREETING

Configure the greeting your customers hear when a number is set to play the Auto Attendant.

Digital Greeting Personal Greeting Upload Audio File

This is your active greeting

Thank you for calling Business Co. Please dial 1 for Ed, or 9 to leave a message.

Save

Listen

1. To record a company greeting on demand, select the **Personal Greeting**.
2. Use the script box provided to type out the message you would like to record.
3. Click **Record One Now** and you will be prompted to enter a mobile number at which you can be reached.
4. Enter the number and click **Call Me**.

EDIT YOUR COMPANY GREETING (Continued)

RECORD NEW VOICEMAIL

We'll call you so you can record your outgoing message.

Number to Call:

5. You will receive a call and voice prompts will walk you through the recording.
6. Once saved via the voice prompt, the message will automatically be set as your default greeting.

Digital Greeting Personal Greeting Upload Audio File

Upload Your Own Audio File

7. To upload a previously recorded personal greeting select the **Upload Audio File** tab.
8. Click **Upload** and you will be prompted to select an audio file for upload.
9. Once uploaded, this will be set as your default greeting
10. To change which greeting is played, click the desired tab and then click **Make Active button to make it your active greeting.**

ACTIVITY – RECENT CALLS

1. [Sign in to your account](#)
2. Click **Activity** from the main menu.
3. Recent Calls, Voicemail, Recorded Calls and Faxes can all be viewed by selecting the respective tab.
4. Click the **Calls** tab to see a history of all calls.

NOTE: Users who have administrative privileges will see call activity for everyone. Users without administrative privileges only will see their own call activity.

ACTIVITY - VOICEMAILS

1. Click the **Voicemail** tab to see voicemail history and listen to voicemails.
2. The voicemail transcription will also display if transcription is enabled in [voicemail settings](#).
3. Click the Play button ► to the left of the voicemail record to view the full transcription and additional details about the call.

LISTEN TO VOICEMAIL MESSAGE

From: +1858-555:2525
To: +1 949-800-8991
Date: November 4, 2016, 01:56 pm

|| 00:00:00 _____ 00:00:13

Hi this is Peter Smith and I'm interested in the house on 123 Main Street. Could you please call me back at 858552525. Thank you.

Close

ACTIVITY - RECORDED CALLS

NOTE: Calls can be recorded by pressing *10 on the keypad during an active call. An announcement will be made to everyone on the call that it is being recorded. Pressing *10 again will stop the recording and announce that the call recording has stopped.

Click the **Recorded Calls** tab to see recorded call history and listen to voicemails.

ACTIVITY

CALLS VOICEMAILS **RECORDED CALLS** FAXES PLACE A CALL

From	To	Date	Duration	
+1 858-333-0146	Extension 101	November 4, 2016, 02:54 pm	00:00:00	

ACTIVITY - VIEW FAXES

NOTE: Your company numbers can be used to accept inbound faxes with no setup required. Cloud phone automatically detects that the inbound call is a fax, handles it appropriately and stores it in pdf format.

Click the **Faxes** tab to view fax history and download Faxes.


ACTIVITY

CALLS VOICEMAILS RECORDED CALLS **FAXES** PLACE A CALL

From	To	Date	Pages	
+61 2 4744 2251	My Number	November 4, 2016, 02:44 pm	2 Pages	



ACTIVITY - DOWNLOAD


1. Voicemails, recorded calls and faxes can be downloaded locally by clicking the download  icon to the right of the desired record.
2. Voicemails and recorded calls are stored as mp3 files.
3. Faxes are stored as pdf files.

ACTIVITY - DELETE

Click the delete  icon to the right of the voicemail, recorded call or fax that you wish to delete.

ACTIVITY - CALLBACK FROM HISTORY

NOTE: Your company number will display as the caller ID for calls placed from the web. If you have more than one number on your account, the number selected as the outbound caller ID in your call settings will display.

1. Click phone icon  to the right of the number from history that you wish to call back.
2. You will be prompted for a call back number.

CALLBACK NUMBER

We'll call you at the number below and connect you to 1 469-878-3273

Number to Call:

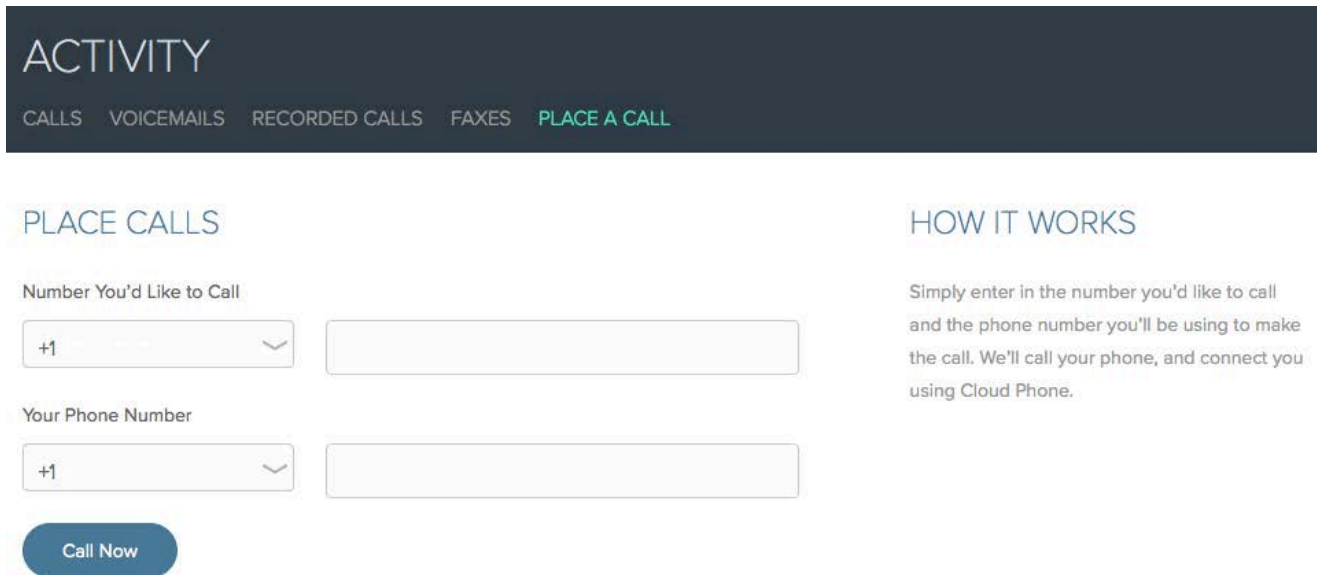
Close

Call Me

3. Enter the number you wish to be called when the call is connected.
4. Cloud Phone will call your number and once accepted will dial the selected number from call history.

ACTIVITY – PLACE CALL

1. The callback feature can be used to place a call to a manually entered number.
2. Click the **Place a Call** tab.



ACTIVITY

CALLS VOICEMAILS RECORDED CALLS FAXES **PLACE A CALL**

PLACE CALLS

Number You'd Like to Call

+1

Your Phone Number

+1

Call Now

HOW IT WORKS

Simply enter in the number you'd like to call and the phone number you'll be using to make the call. We'll call your phone, and connect you using Cloud Phone.

ACTIVITY – PLACE CALL (Continued)

3. You will be prompted for the number you wish to call as well as the number at which you would like to receive a callback.
4. Cloud Phone will call your number and once accepted will place the call to the number you entered.

PURCHASE ADDITIONAL TOLL FREE OR LOCAL NUMBERS


1. [Sign in to your account](#)
2. Click **Company** on the top main menu and select **Numbers**
3. Click the **Buy a Number** button.
4. Under the drop down menu for type, choose whether you want a virtual number (another local number) or a toll free number.
5. Click the **Select Number** button.
6. Enter your credit card information or select **Purchase** to charge the credit card saved.

MANAGE ACCOUNT INFORMATION

1. [Sign in to your account](#)
2. Click **Account** from the top main menu.
 - I. Click **Plan & Usage** to view your current plan details and view your monthly mins.
 - II. Select **Billing** to view account balance or edit billing information

BYPASS THE AUTO ATTENDANT

Calls can be routed to go directly to your number rather than through the auto attendant.

1. [Sign in to your account](#)
2. Click **Company** from the top main menu.
3. Click **Numbers**.
4. Click on the settings icon  of the number you would like to send to your device.
5. Change the **Call Behavior** from 'Auto Attendant' to 'Connect to Phone Number.'
6. Click **Update Number**.

CHANGE YOUR PROFILE INFORMATION

Edit your Name, email address and password.

1. [Sign in to your account](#)
2. Click **Company** from the top main menu.
3. Click **Profile** from the drop down menu.

E

EDIT

NAME

NOTIFICATIONS

Save Changes

NAME

Configure your company's name.

Company Name

Business Co

NOTIFICATIONS

How would you like us to notify you when you receive messages?

Send email notifications to:

Hans.solo@voxox.com

Send SMS notifications to:

+18584004040

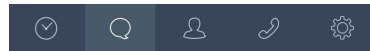
4. Edit the desired information

NOTE: Be sure to **update your notifications** with your new email address if you are receiving voicemail notifications by email.

SEND & RECIEVE BUSINESS SMS

Log in to your Cloud Phone app (You will need to be updated to the latest version).

1. Select the message icon on the bottom of your screen
2. Click the plus icon at the top right to select a contact
3. Once you select a contact or enter a number, you'll be able to send a text!



SIGN OUT

To sign out of Cloud Phone, click the initials at the top right of the page, then Click **Sign out**.

