# QUICK START GUIDE

Customer Portal, Unified Desktop, Mobile and Meeting

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# Hosted PBX Customer Portal

Introduction

Welcome to Cogeco's Hosted PBX. This guide will help you get up and running with the Customer Portal and Unified package features. The Hosted PBX Customer Portal is the web portal used to configure the features on your new business phone system.

**With Hosted PBX Customer Portal, you can:**

• View missed calls;

• Listen to voicemail messages;

• Manage your contacts;

• Set up rules to route your calls;

• And perform many other functions.

**This handy guide will take you through the following:**

1. Customer Portal: A web portal used to configure your call services.

2. Unified Desktop: A Windows/Mac softphone designed for calling, instant messaging and more.

3. Unified Mobile: An iOS/Android app with full-featured dialer, instant messaging and more.

4. Unified Meeting: A Windows/Mac application for audio and video conferencing over the internet.

**Ready to get started?** Go to the login page at: businessplus.cogeco.net/login (Consult your administrator regarding your default password. Once you log in, you will be prompted to create a new password.)

*This Guide is representative and may vary from your individual Hosted PBX Customer Portal screen.

## Getting Oriented

Once you are logged in, you will see the Hosted PBX Customer Portal Home page:
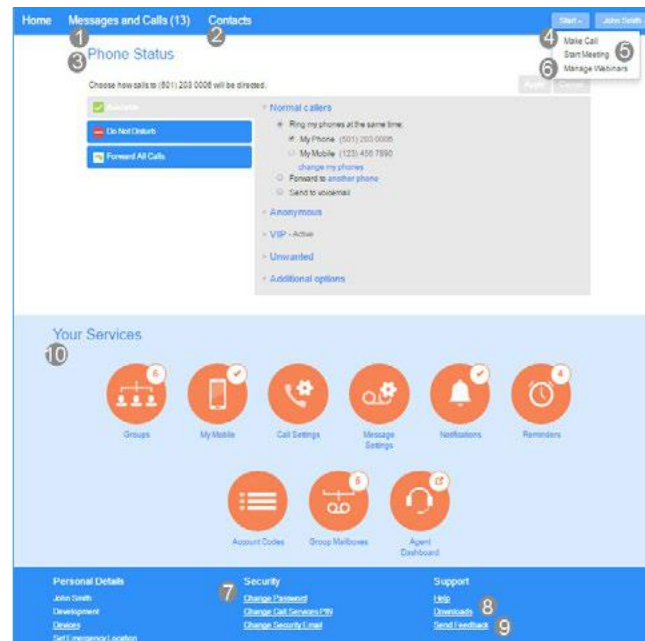


## Home Page

The Hosted PBX Customer Portal Home page is the main screen for the portal where you can view your Call Manager settings and access a range of other services.

1. **Messages and Calls (13)**
   Click this link to view and retrieve any voicemails

2. **Contacts**
   Import your contacts from Outlook or create new ones, then click on a name to dial

3. **Phone Status**
   Control your Call Manager settings

4. **Make Call**
   Make a call direct from Hosted PBX Customer Portal

5. **Start Meeting**
   Start a Hosted PBX Unified Meeting

6. **Manage Webinars**
   Create or manage your webinars

7. **Security**
   Use these links to change your password or security email address

8. **Downloads**
   Download apps, for example Hosted PBX Unified Desktop app

**9. Send Feedback**
Report bugs or make suggestions for improvements to the Hosted PBX Customer Portal interface

**10. Your Services**
Use these links to access a range of services available with your Hosted PBX Customer Portal account, for example to change your call, message and notification settings, or set up a Reminder call.

## Messages and Calls
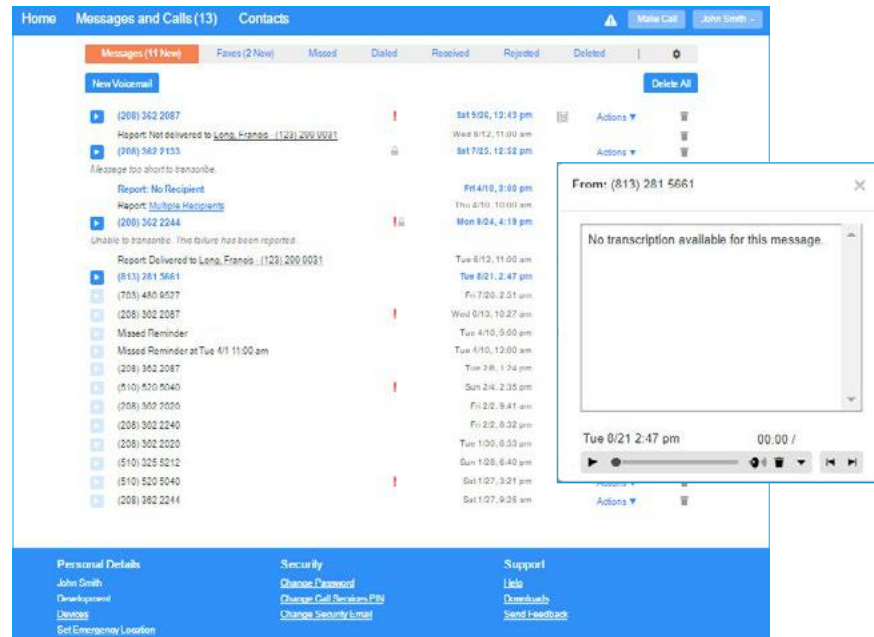


The **Messages and Calls** tab displays all recent call activity. Here you can retrieve voicemails and view calls based on whether they were missed, received, dialed, or deleted.

Click on one of the sub-tabs to get more detail. From the **Missed**, **Dialed**, and **Received** tabs you can click on the name and either call them, add them to your contacts, or jump to the caller's existing contact information.

Use the **Action** drop-down alongside each message to mark as **Heard** (or) **New**, **Forward as Email**, or Forward as Voicemail, or click the trash icon to delete it.

Click the '**play**' arrow button to listen to a voicemail. Note that you can listen to your voicemails in any order. A window (as shown over the Messages and Calls screen) will open to display the Voicemail player where you can listen to and manage the message.

Click the '**New Voicemail**' button at the top of the page to record and leave a voicemail as a memo (your computer must have a microphone to use this function).

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## Contacts

The Contacts page enables you to manage all of your contact information. Within it, you can create new contacts (using recent call information like a missed call, or create a new one from scratch), create groups of contacts, or import/export your contacts.

Example of
Contacts page
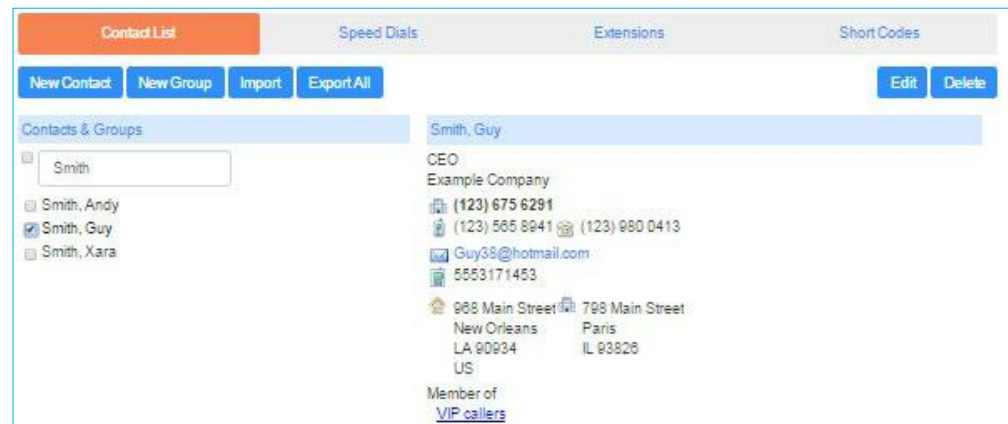


The fastest way to add your contacts is to import them from your email program. If you use Microsoft Outlook, follow these instructions:

• Open Outlook and go to the '**File**' tab – then 'Import and Export'

• A new window should appear

• Select Export to File – click **Next**

• Select **Comma Separated Values** from the list and click **Next**

• Select **Contacts** from the folder tree and click **Next**

• Save exported file as 'Outlook Contacts' and click **Next** – save in a place you can easily locate such as the Desktop or My Documents

• Go back to the Hosted PBX Customer Portal Contacts page

• Click the **Import** button

• Click the **Browse** button to find the 'Outlook Contacts' file

• Click **Import**

• Your contacts are now in Hosted PBX Customer Portal!

## Making Calls From Hosted PBX Customer Portal

You can make a call direct from Hosted PBX Customer Portal by clicking **Make Call** to launch the Dialer.

On the Dialer you can enter the number you want to call, either by typing it in or selecting from a dropdown list of your Contacts, and also choose which of your telephone numbers will be used to make the call.

*VoIP 9-1-1 Service features may differ from traditional wireline 9-1-1 services. Visit cogeco.ca/en/business/phone/911 for more information.

## Call Manager

The Phone Status panel in the center of the Hosted PBX Customer Portal Home page displays your Call Manager where you can set your availability status and manage how incoming calls are routed to you.

Example of the Phone Status panel
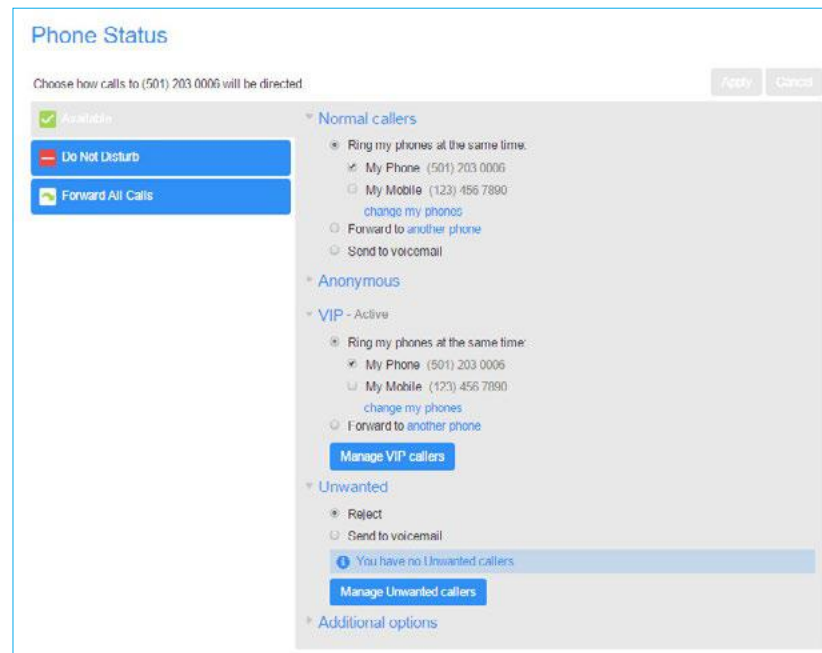


The top section on the left enables you to change your setting from '**Available**' to '**Do Not Disturb**,' allowing you to route calls directly to voicemail if you're busy. There is also a forwarding option that enables simultaneous ring with your mobile device.

The panel on the right allows you to set up how calls from various different types of callers are handled. You can use options on this screen to add numbers to VIP and Unwanted callers lists.

## Downloading Apps

You can use the **Downloads** link, located at the foot of the Hosted PBX Customer Portal Home page, to access a range of apps that you can download onto your computer or your mobile/tablet so that you can always have access to the key Hosted PBX Customer Portal features on your desktop or mobile device.

## Changing Settings

The panel at the bottom of the Hosted PBX Customer Portal Home page allows you to make various changes to your settings. For example:

- To configure your phone according to your preferences, use the **Devices** link. On the screen that appears, use the '**set keys**' link to configure your phone according to your preferences.

- To change your password and/or PIN, or your security email address, click on the links under **Security** at the bottom of the Home page.

The **Calls Settings** page allows you to control various call settings, for example withholding your caller ID and configuring **Call Forwarding**, **Call Blocking** or **Call Jump settings**.

The **Messaging Settings** page enables you to control how your messages are handled. For example, you manage mailbox settings, customize how you are notified of a voicemail, configure greetings, and more. Using Voicemail Greetings, you can personalize your voicemail greeting by recording an announcement (a microphone is required).

Example of Messaging Settings page

# Hosted PBX Unified Desktop

Your Cogeco Hosted PBX phone service can be used to make or receive calls from your desk phone, your PC or Mac, and your mobile devices. For this to work on your desktop, you need to install the Hosted PBX Unified Desktop software on your PC or Mac. This guide will help you to do that.

### Ensure Your Computer Is Compatible

Hosted PBX Unified Desktop works on PCs running Windows 7 or Windows 8. It also runs on Macs that have OS X 10.7 or later versions.

You can use your computer's built-in microphone and speakers, but you will have much better audio quality if you use a headset. Hosted PBX Unified Desktop works with most common headsets, including Bluetooth. It will even work with the answer/reject call button on some headsets.

### Find Your Password

You will need your Cogeco Hosted PBX Customer Portal user number and password to start using Hosted PBX Unified Desktop. If you don't have this information, call us on 1-855-440-5602.

### Download and Install the Software

Download Hosted PBX Unified Desktop from: businessplus.cogeco.net/login

Once you have logged in, click on the **Download** link under Support (bottom right of the Portal interface) to download and install the Hosted PBX Unified Desktop app.

When prompted, save the file. Find the file in your downloads folder, open it, and follow the on-screen instructions to install the software.

### Exploring Hosted PBX Unified Desktop

Hosted PBX Unified Desktop is like having your desk phone on your computer. You can make and receive calls, hold calls, transfer calls, and make three-way calls.

You can also use Hosted PBX Unified Desktop to send instant messages, transfer files, and send Presence information to other people in your corporate directory who are using Hosted PBX Unified Desktop (on any device). Hosted PBX Unified Desktop uses the Wi-Fi, broadband, or mobile data services available and connected to your computer. Hosted PBX Unified Desktop won't work well if there are firewall restrictions within a network, or if poor quality network conditions are present.

## Making Calls



Making a call is as easy as entering the number on the keypad or clicking on a contact's call button. If your contact has more than one number, you can choose which number to call from the drop-down list. If the person you are calling has caller ID, they will see your individual phone number.

*VoIP 9-1-1 Service features may differ from traditional wireline 9-1-1 services. Visit cogeco.ca/en/business/phone/911 for more information.

## Receiving Calls

When someone calls your number, you will see a pop-up window appear on your computer screen and hear a ringing tone through your speakers or headset. The pop-up shows the number of the person calling you. If that person's details are already in your contacts list, the pop-up displays the caller's name.
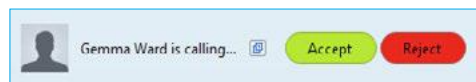


Depending on the other services you have from Cogeco, you may see the incoming call on your desk phone, on your mobile phone, or on a tablet device. You can answer the call on whichever device is most convenient for you.

## During the Call

While a call is in progress you can use the call window to:

1. Add a participant.

2. Transfer the call.

3. Perform a CRM look-up.

4. Put the call on hold.

5. Send video.

6. Mute your microphone.

7. Adjust the volume.

8. Access the keypad.

9. Record the call.

10. Merge calls.

11. End the call.

You may receive a call while you are already on another call. If you answer the new call, the current call is automatically placed on hold and the new call appears in a new call progress window. Switch between the two calls using the window for each one, or click on the **Merge calls** icon to merge other callers into a single call.

## Video Calling

If the person you are talking to is also using a Hosted PBX Unified app on the same network, you can upgrade your call to video at any time. Click on the **Video** icon to send your video. The other person will receive a prompt inviting them to switch on their video too. Click on the **Video** icon at any time to turn off your video feed.

## Send the Call to Someone Else

Use the **Call Transfer** icon to send any call to another number. A menu will pop-up allowing you to select a contact, or you can type in a completely new number to transfer the call to. You can also transfer the call to another of your devices that has a Hosted PBX Unified app installed, without having to hang up!

## Instant Messaging

If you have Hosted PBX Unified with Instant Messaging, click on a contact's **Chat** icon to send them an instant message.
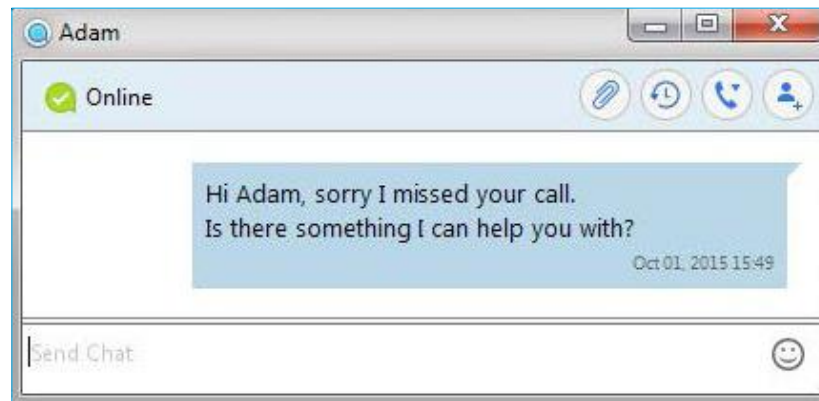


From within the chat window, you can send files, view your chat history with the contact, call the contact, and add one or more participants to the conversation.

## Reject Call With IM

If the caller is in your Contacts list, you can reject a call and send the caller an instant message explaining why you can't take the call. Click on the drop-down list next to **Reject** and select one of the system messages, or click **Custom Message** to type your own message.

## Presence

Let others know whether you are available or busy by setting your presence to **Online** or **Busy** .

Your Presence information automatically shows when you are **Away** , **On the Phone** , or **In a Meeting** (this references the information in your Outlook calendar).

## Call Manager

You can tell Hosted PBX Unified Desktop how to handle your incoming calls. Click on the **Presence** selector, expand the **Available** option and choose between:

☑ **Available**

⊟ **Do Not Disturb**

⤳ **Forwarding**

If **Do Not Disturb** is selected, callers hear a recorded voice announcement saying that you are unavailable and are then connected to your voicemail. None of your devices will ring until you turn off **Do Not Disturb**, so be sure to use it carefully!

You can select **Forwarding** to forward all incoming calls to another number. You are then prompted to enter the number you want to forward calls to.

Note that when you change your **Presence** or **Call Manager** settings, the change applies on all of your Hosted PBX Unified devices. So if you step away from your computer and forget to update your status, you can change your status using the Hosted PBX Unified app on your mobile phone instead.

## Choosing Which Calls to Receive

You can specify how calls should be handled if they are from anonymous numbers, from VIPs, or from numbers on your Unwanted Callers list.

To do this, click on the **Presence** selector, expand the **Available** option, and select the **View all** settings option at the end of the menu. This opens the **Call Manager Status** window, where you can set your call handling preferences.

Example of Call Manager Status window
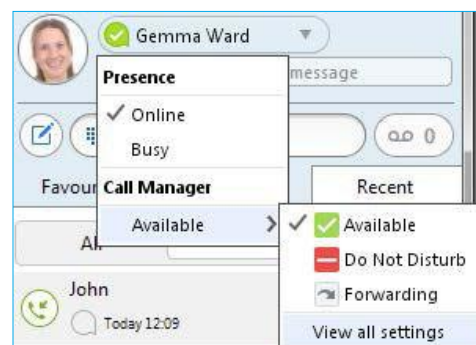
## Your Contacts List
🔘 1

Hosted PBX Unified Desktop assembles a contact list for you to use. Depending on how your service is set up, the contact list may include:

- Contacts that you type directly into Hosted PBX Unified Desktop.
- Contacts in the Outlook or Mac local address book stored locally on your computer.

- Contacts in Hosted PBX Customer Portal contacts.
- Contacts in your corporate directory.

## Visual Voice Mail

If you have a voice or video message, the **Message** button changes color and indicates the number of messages received. Click this button to see a list of messages received, to see transcriptions of the messages into text (where available), or to listen to the messages.

## Emergency Calls

Hosted PBX Unified Desktop lets you make calls from anywhere on the most convenient device. Therefore, if you place a 911 call from Hosted PBX Unified Desktop, the 911 operator may not be able to identify where you are calling from. Visit our 911 Emergency Service Limitations page at cogeco.ca/en/business/phone/911 for more information.

## Favorites

For quick access to frequently-called people, add the contact to your Favorites list. Use the right-hand mouse button to click on any contact and choose **Add to Favorites** from the drop-down list. Favorites appear in the Favorites list and in the Contacts list.

## Privacy and Protection

If Hosted PBX Unified Desktop is configured to automatically sync with Outlook, you can view and edit your Outlook contacts using Hosted PBX Unified Desktop.

# Hosted PBX Unified Mobile

Your Cogeco Hosted PBX phone service can be used to make or receive calls from your desk phone, your PC or MAC, and your mobile devices. For this to work on your mobile or tablet, you need to install the Hosted PBX Unified Mobile app. This guide will help you to do that.

### Ensure Your Device Is Compatible

Hosted PBX Unified Mobile works on:

• Android phones and tablets using version 5.0 or later.

• iOS devices running iOS 10.0 or later.

Video calling only works on devices that have a front-facing camera.

### Find Your Password

You will need your Cogeco Hosted PBX Customer Portal user number and password to start using Hosted PBX Unified Mobile. If you don't have this information, our Business Solutions specialists can help you. Visit cogeco.ca/specialists

### Download and Install the App

Search for Accession in Google Play or iTunes App Store and touch **Install** to download the app to your device. Check the Terms & Conditions and touch **Accept & Continue**.

Tap **Open** on the app and select Cogeco as your Carrier. Enter your Cogeco Hosted PBX Customer Portal user number and Password and tap **Log in**.

If you want to have the ability to switch calls to your own cellular network (for example, if you move to an area with poor Wi-Fi connection during a call made on Hosted PBX Unified Mobile) enter your own mobile phone number and tap **Continue**.

## Exploring Hosted PBX Unified Mobile

Hosted PBX Unified Mobile is like having your desk phone on your mobile. You can make and receive calls, hold calls, transfer calls, and make three-way calls. You can even push and pull calls from your phone to other twinned devices, mid-call. You can also use Hosted PBX Unified Mobile to send messages to other people in your corporate directory who are using a Hosted PBX Unified app (on any device).

Hosted PBX Unified Mobile uses the Wi-Fi, broadband or mobile data services available, so you can make and receive calls without using your mobile minutes. Mobile network conditions may affect Hosted PBX Unified Mobile. You can access the Hosted PBX Unified Mobile features using the Contacts, Phone, Chat and Meetings tabs.

Example of mobile Contacts tab



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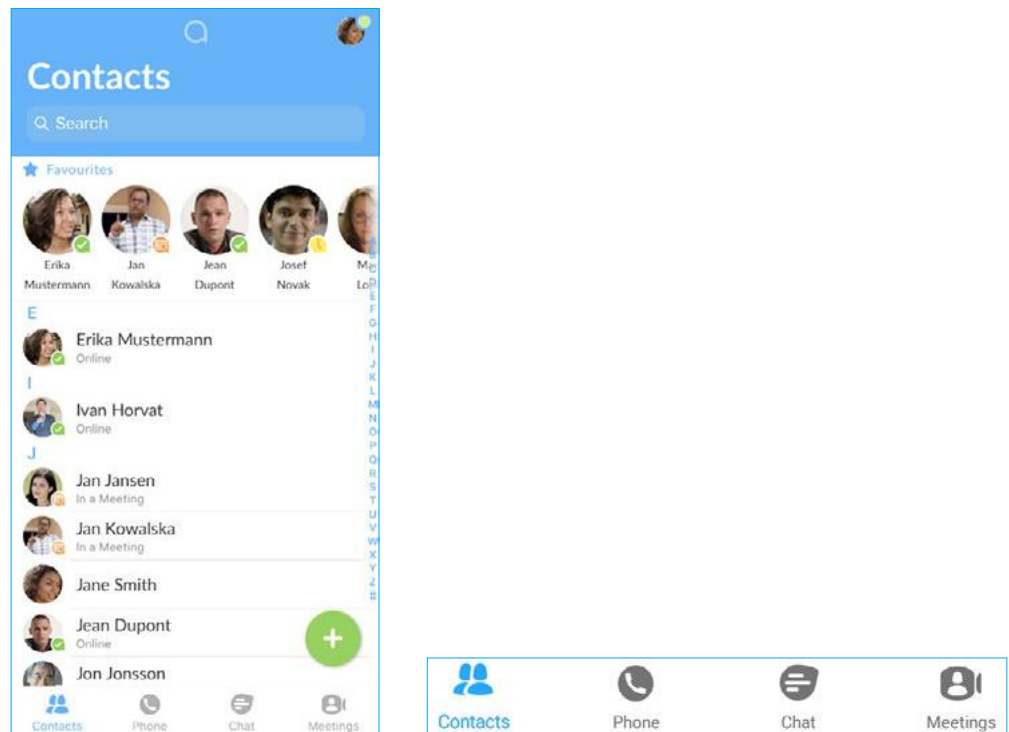
## Contacts Tab



Contacts

Hosted PBX Unified Mobile assembles a contact list for you to use. Select the **Contacts** tab to view your Contacts list. Depending on how your service is set up, the Contacts list may include:

- contacts that you type into the Hosted PBX Unified Mobile app
- contacts stored on your mobile device
- contacts in Customer Portal contacts
- contacts in your corporate directory

The contact's status appears in a speech bubble next to their profile picture. Tap on a contact to access **Call**, **Chat** and **Meeting** options.

Tap on the Plus icon ✛ to add new contacts.

Example of a
contact status



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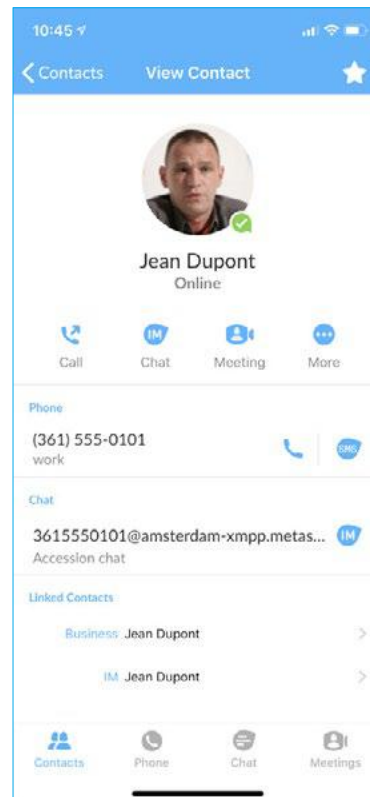
Phone Tab

Tap on the **Phone tab** to make a call, view your **Call History** and listen to Voicemail.

To make a call, tap on a contact and select the number to call or tap on the **Dialer** icon ⠿ and enter the number.

*VoIP 9-1-1 Service features may differ from traditional wireline 9-1-1 services. Visit cogeco.ca/911 for more information.

Phone

If the person you are calling has caller ID, they will see your individual Company phone number.

The Voicemail tab shows the messages received.

• Tap on the **Play** icon to listen to a voicemail.

- Tap on the **Voicemail** entry to see **Call**, **Meetings** and **More** options.

- Tap **More** to access **Add contact**, **Mark as Unheard** or **Delete Message**.

If you have a fax message, the **Faxes** tab appears and you can tap on it to see the fax.

## Chat Tab

Chat

Tap the **Chat** tab to use Instant Messaging.

Tap on a contact to continue a previous conversation or click on the **New message** icon ⊕ and choose a contact to message.

From within the chat window, you can start or continue a conversation, send files, call a contact, or add one or more participants to a conversation. Your Instant Messages automatically sync to all of your Hosted PBX Unified devices.

## Meetings Tab

Meetings

Select the **Meetings** tab to **Create** or **Schedule** a Hosted PBX Unified Meeting, Join a **Meeting** or view **Upcoming Meetings**.

## Receiving Calls

When someone calls your number, the Hosted PBX Unified Mobile app offers you the choice to accept or reject the call. Depending on the other services you have from Cogeco you may also see the incoming call on your desk phone, on your desktop, or on a tablet device. You can answer the call on whichever device is most convenient for you.



## During the Call

While a call is in progress you can use the call window to:

**Mute** your microphone.

Access the **Keypad**.

Turn on the **Speaker**.

Put the call on **Hold**.

Invite a **Favourites** contact to join the call.

**Add/Transfer** the call allows you to make a second call and add the contact into a 3-way call or transfer the call.

Uplift the call to Unified **Meeting**.

Access **More** options (send video or switch the call to another device).

Example of the call window

You may receive another call while you are already on a call. Hosted PBX Unified Mobile gives you the option to:

• Hold the existing call and answer the new call.

• End the existing call and answer the new call.

• Ignore the new call.

Transfer the Call

Tap **Add/Transfer** to send the call to another number. You can select a contact or type in a number to transfer the call to. You can also transfer the call to another of your devices running Hosted PBX Unified Mobile, without hanging up!

Switch the Call to Another Device

If the call has poor audio due to an unreliable Wi-Fi or mobile data service connection, tap **More** then **Switch** and select **This device (cellular)** to move the call to your regular cell phone. Remember that the call will now start to use your mobile minutes.

Alternatively, you can choose to push the call to another of your devices running a Cogeco Hosted PBX Unified app, such as your desktop or your iPad. Tap **More** then **Switch** and select **Another device** to push the call to whichever device is most convenient.

## Call Pull

You can also pull calls from your other devices onto your mobile. If a call exists that can be pulled, the Hosted PBX Unified Mobile menu displays a **Call Available to Pull** option. Tap this option and follow the on-screen prompts to pull the call from your other device onto your mobile.

## Video Calling

If the person you are talking to is also using a Cogeco Hosted PBX Unified app and your phone has a front-facing camera, you can add video to your call any time. Tap **More**, then **Video** to send your video. The other person will receive a prompt inviting them to switch on their video too. Click on the Video icon at any time to turn off your video feed.
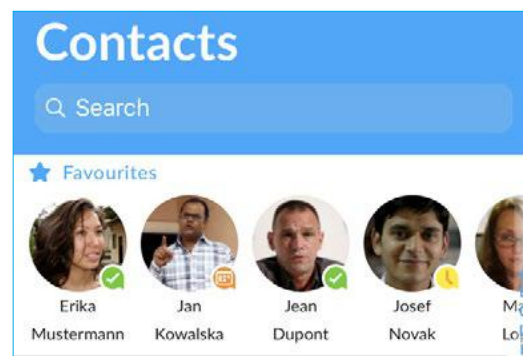
## Favourites

Tap the **Star** icon on a contact's directory entry to add the contact to **Favourites**.



**Favourite** contacts appear in a banner at the top of the **Contacts** tab.

Example of Favourite contacts

During a call, click on the **Favourites** icon to view your favourite contacts. Drag and drop a contact into the call window to setup a new call. When the contact answers, you can merge them into the initial call to create a 3-way call.
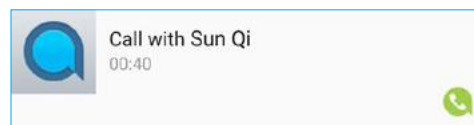
Example of dragging contacts into the call window



## Call Notification

When you minimize the call window, the notification banner at the bottom of the screen indicates the active call.



## Presence

Whenever one of your contacts is signed in to their Chat account, Hosted PBX Unified Mobile displays their presence information on the **Contacts**, **Phone**, and **Chat** tabs.

Available          Away               On the phone        Busy



In a meeting       Do not disturb     Offline

## Profile & Settings

Click on your avatar in the top-right to access Call, Chat, and Contact settings, and additional setup options. You can also configure your profile, send error reports and access **Call Manager** in the **Profile & Settings** window.



## Call Manager

You can tell Hosted PBX Unified Mobile how to handle your incoming calls. Tap the **Call Manager** tab and select **Available**, **Do not disturb**, or **Forward all calls**. If you select **Do Not Disturb**, callers hear a recorded voice announcement saying that you are unavailable and are then connected to your voicemail. None of your devices will ring until you turn off Do Not Disturb, so be sure to use it carefully! Select **Forward all calls** and, in the **Forwarding number** box, enter the number you want to forward all calls to.

Note that when you change your **Call Manager** settings, the change applies on all of your Hosted PBX Unified Mobile devices.

Example of Call
Manager screen



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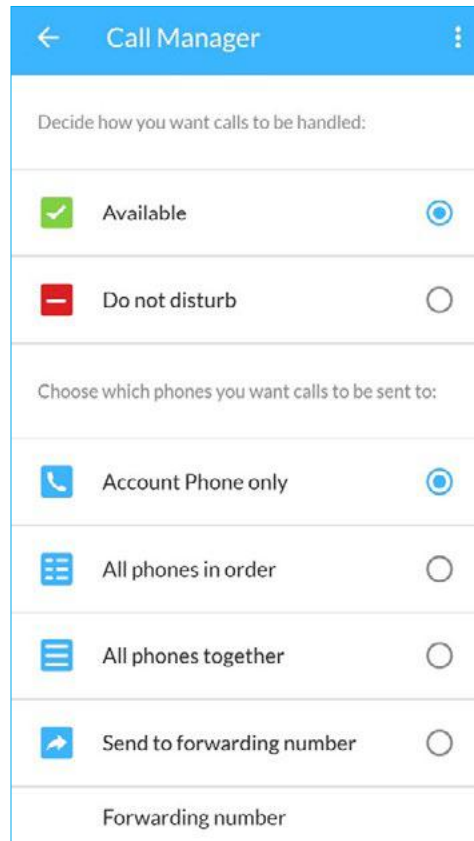
Emergency Calls

Hosted PBX Unified Mobile lets you make calls from anywhere on the most convenient device. If you place a 911 call from Hosted PBX Unified Mobile, the 911 operator may not be able to identify where you are calling from. Visit our 911 Emergency Service Limitations page at cogeco.ca/911 for more information.

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# Hosted PBX Unified Meeting

Hosted PBX Unified Meeting provides audio and video conferencing over the internet, including web collaboration features such as screen sharing, whiteboard annotations, and presentation capabilities.

If you have set up Hosted PBX Unified Desktop with Hosted PBX Unified Meeting, you can invite any of your contacts to join you in a meeting, even if they do not have Hosted PBX Unified Desktop!

## Find Your Password

You will need your Cogeco Hosted PBX Customer Portal user number and password to start using Hosted PBX Unified Desktop and Hosted PBX Unified Meeting. If you don't have this information, call us on 1-855-440-5602.

## Download and Install the Software

First, download Hosted PBX Unified Meeting for Desktop here: businessplus.cogeco.net/login

Once you have logged in, click on the **Download** link under **Support** (bottom right of the Portal interface) to download and install the Hosted PBX Unified Desktop app. When prompted, save the file, then find the file in your downloads folder and open it to begin the installation process.

## Set up an Hosted PBX Unified Meeting

You can choose to start an instant meeting from Hosted PBX Unified Meeting for Desktop, from the Hosted PBX Customer Portal dashboard, or directly from your Outlook calendar.

Within Hosted PBX Unified Desktop, you can send a meeting invitation:

- using the Hosted PBX Unified Desktop **File** menu
- from your Contacts list or while viewing a contact's details
- while chatting to a contact using instant messaging
- when you are in a call.

When you start a meeting, you are prompted to select the contacts you want to invite to join you in the meeting. You can then start the meeting and contacts can simply click on the invitation to join your meeting.

## Schedule a Meeting

You can use Hosted PBX Unified Meeting to schedule a one-off or recurring meeting. Select the **Schedule A Meeting** option from Hosted PBX Unified Desktop, from the Hosted PBX Customer Portal dashboard, or directly from your Outlook calendar to launch the **Schedule A Meeting** window. Here, you can set the date, time, and length of the meeting, and specify various other audio and video settings for the meeting.

Then click **Schedule** to open the meeting invitation and select the participants you want to invite to the meeting before sending the invite. The Hosted PBX Unified Meeting is added to the participant's calendar.
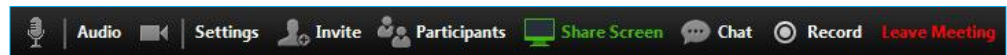
## Join a Meeting

You can join a Hosted PBX Unified Meeting by clicking on the on-screen invitation or by opening the Meeting URL in a browser.
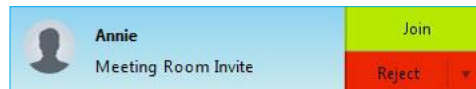


## Explore the Meeting Window

While a meeting is in progress, you will either see the participant toolbar or the host toolbar at the bottom of the Meeting window.

Participant toolbar:



Host toolbar:



## Set up Your Audio

Use the Microphone icon to toggle your microphone on and off.

Click on **Audio** to change your audio options.

Select **Join Audio** to allow Hosted PBX Unified Meeting to use either your phone or your computer's microphone and speaker.

Select **Leave Audio** to prevent Hosted PBX Unified Meeting from using your speaker and audio device.

Use the **Video** icon to toggle your video on and off.

## Access the Settings Menu

Click on **Settings** to access the **Settings** menu, where you can set up and test your microphone, speakers, and video. You can also use the Settings menu to specify where to save recorded meetings and to access additional application settings.

## Invite Contacts to Join You in the Meeting

Click on 👤 **Invite** and select the contacts you want to invite to join you in the meeting. The contacts you select are then sent a meeting invitation.

## View Meeting Participants

Click on 👥 **Participants** to see who has joined the meeting. You can access the following options from the **Participant** window.

( **Raise Hand** ) let the meeting host know you have something say.

( **Rename** ) change your display name.

If you are the meeting host, click on ( **Manage Participants** ) to access the Participants window.

Meeting hosts can use the following additional options to manage participants:

( **Mute All** ) or, ( **Unmute All** ) or ( **Mute** ) to mute a specific individual.

( **Lock Screen Share** ) to prevent meeting attendees from sharing their screen.

( **More >** ) to access additional options, including:

- **Mute on Entry** - mute all attendees as they join the meeting.
- **Play Enter/Exit** Chime when a participant joins or leaves the meeting.
- **Lock/Unlock Meeting** - no new attendees can join if the meeting is locked.

The following icons provide additional information about each attendee.

🎤 The participant is currently speaking.
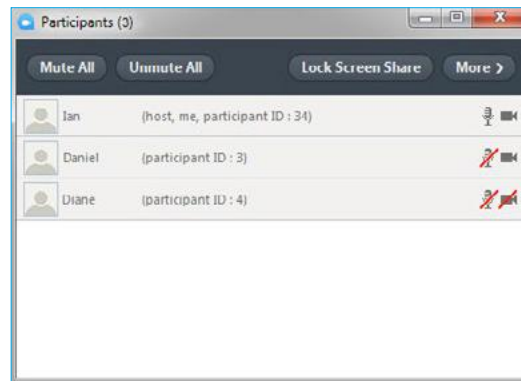
🎤 The participant's microphone is on.

🎤 The participant's microphone is muted.

◻ The participant's video camera is on.

◻ The participant's video camera is off.

✋ The participant has raised their hand.

Example of Participant window



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## Share Your Screen

Click on 🖥 **Share Screen** and choose the desktop or individual application window that you want to share. Once you are sharing your screen with meeting participants, you will see the Screen Share toolbar.

**Note:** The Share Screen option may not be visible if the meeting host has selected to Lock Screen Share.



The Screen Share toolbar provides the following options:

• **Pause/Resume** screen sharing.

• **Share a New Window** - select a new window to share.

**Note:** The Annotate option may not be visible if the meeting host has selected to Disable Attendee Annotation.

• **Annotate** your shared screen using a variety of shapes and highlight tools, including: a Mouse; Draw options (lines, shapes, and arrows); a Spotlight tool; an Eraser to remove selected annotations; and Undo, Redo and Clear annotation options.

• **Mute** - toggle your microphone on and off.

• **Stop/Start Video** - toggle your video sharing on and off.

• **More** - access Chat, Record, Settings, and Audio Conference options.

Click ■ **Stop Share** to exit screen sharing.

## Send a Message to Meeting Attendees

Click on 💬 **Chat** to open a Chat window and send a message to another meeting attendee.

Click on ( **Save Chat** ) to save the conversation to your local computer.

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## Record Your Meeting

Click on ⦿ **Record** to start recording the meeting.

Click 🖥 **Stop Recording** to start recording the meeting.

When the meeting ends, you will see a pop-up saying that the meeting recording is being saved and converted to mp4 format.

**Note:** The Record option may not be visible if the meeting host has disabled recording for the meeting.

The directory containing the saved recording then automatically opens showing the recorded file, and the meeting will also appear in your list of recorded meetings within the Hosted PBX Unified Meeting application.

You can specify the directory to save recorded meetings to using the **Settings** menu.

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## Leave the Meeting

Click on **Leave Meeting** to leave the meeting.

If you are the meeting host, click on **End Meeting** - this will end the meeting for all participants.

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## Additional Meeting Window Options

⤢ **Enter Full Screen** extends the meeting display to a full-screen display.

⤡ **Exit Full Screen** exits the full-screen display.

▦ **Gallery View** displays the video for all meeting participants.

▤ **Speaker View** displays the video for the current speaker.

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**Questions?**

Please visit our HPBX FAQ page at **cogeco.ca**
or call us at 1-855-440-5602.

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