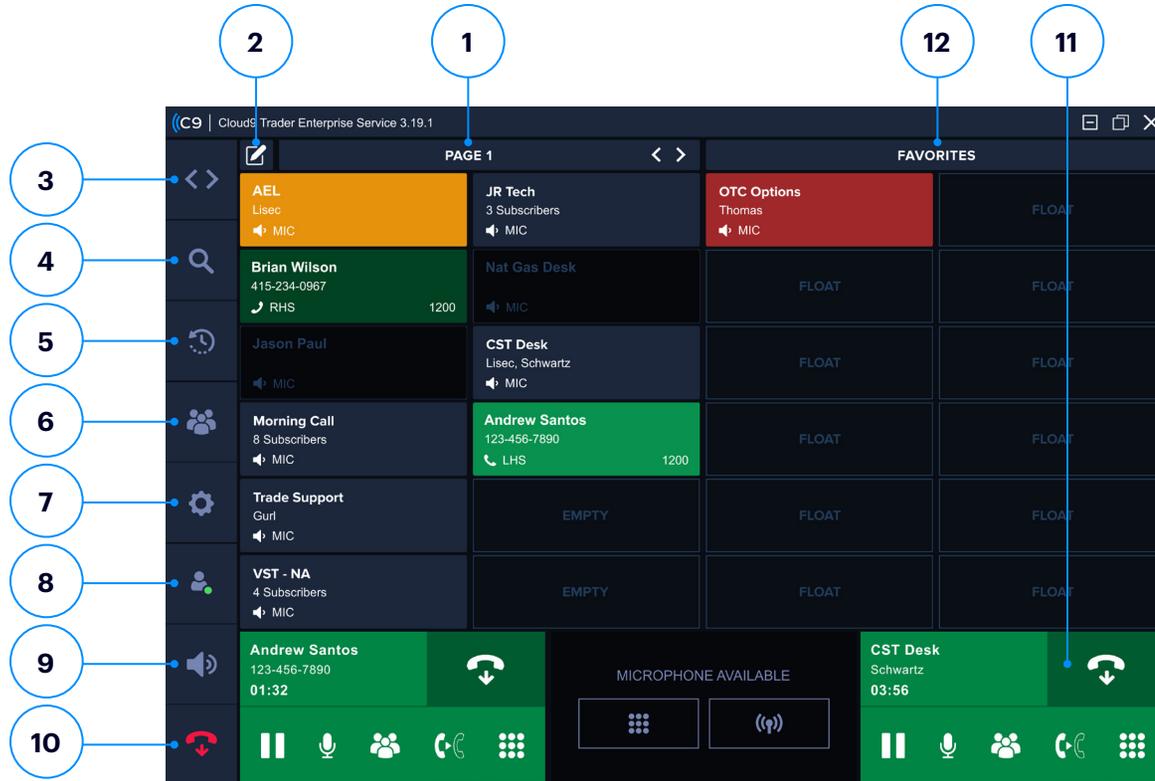


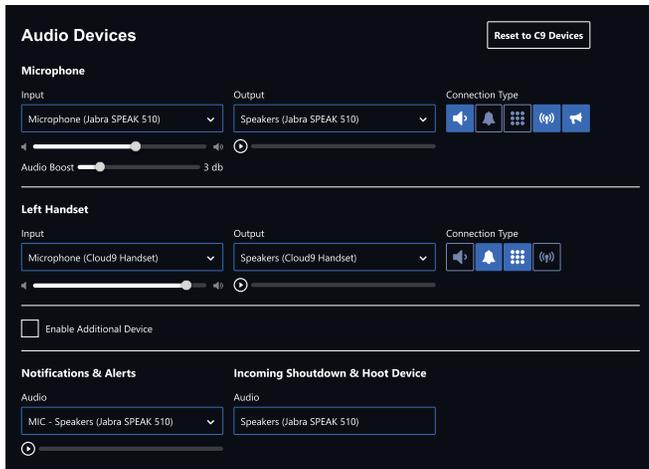
C9 Trader Reference Guide



- 1 Pages:** Allows you to customize the buttons on your layout for better organization. Users can have up to 50 pages
- 2 Edit Button:** Enables a user to add new pages, delete and relabel pages, and reorganize buttons and pages by dragging and dropping them to the desired location
- 3 Go To Page Menu:** Quickly navigate to a specific page
- 4 Global Search:** Enables you to search all your buttons, line appearances, directs, contacts, Outlook contacts (if enabled) and Dynamic Intercom directory
- 5 Call History:** Displays up to 200 made, missed and received calls
- 6 Community:** Open to create or manage invitations, connections and add contacts
- 7 Settings Menu:** Where users can configure their audio devices, program their button boards/CloudHubs, and make other system preferences
- 8 Do Not Disturb (DND):** Prevents ad-hoc intercom calls from connecting and ringing out loud; DND can also be enabled for Dial Tone calls
- 9 Master Volume:** Controls overall volume for all call types
- 10 Global Release:** Disconnect from all active calls on any device
- 11 Call Wells:** Represents the configured audio devices and where active calls are available
- 12 Favorites Panel:** Allows a user to pin frequently used connections into the panel. Any unused buttons will default to Float keys. Incoming call activity enabled for "Float" will appear under Favorites when not in the visible connection's page

SOLID	Counterparty is available		Shutdown connection	AUTO / SPEAKER	Auto answer or Speaker is on and only appears on Intercom buttons
FLASHING	Priority incoming call		Ringdown connection		Muted speaker
FLASHING	Incoming call		Intercom connection		Privacy engaged
FLASHING	Outgoing call		Hoot channel		User is talker on Hoot
SOLID	Active call		Dial tone line appearance		Group Broadcast
SOLID	Call on-hold		Speed dial	RHS	Right Handset
SOLID	Remote active call		Priority	LHS	Left Handset
FLASHING	Remote call on-hold		Audio Broadcast	MIC	Microphone

Setting Your Audio Devices

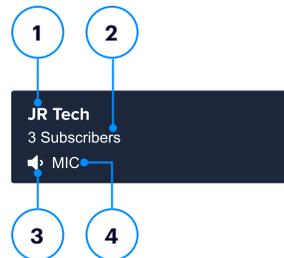


To configure Audio Devices click on the settings icon on the left side of the panel > Audio devices.

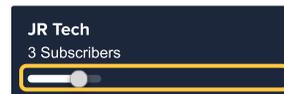
- Users can use up to 3 audio devices (left Handset, Right Handset, Microphone)
- For each device input and output, select the audio device you would like to use for microphone and handsets. Typically, the same device will populate the input and output for each device section.
- If using a CloudHub, users can select 'Reset C9 Devices' and it will automatically assign the audio devices.
- Connection Type is selected next to each device. This is showing the default device that will pick up for that call type.

Buttons

UNDERSTANDING YOUR BUTTONS

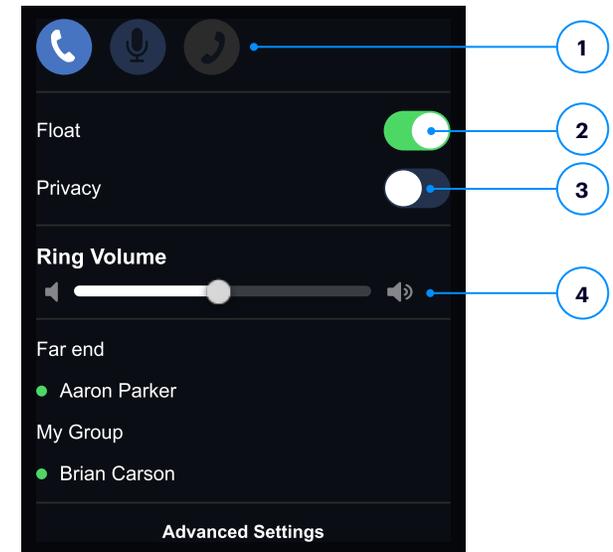


- 1 Button Label
- 2 Number of active subscribers
- 3 Connection type (shoutdown shown)
- 4 Default audio device



Hover over button to access individual volume control

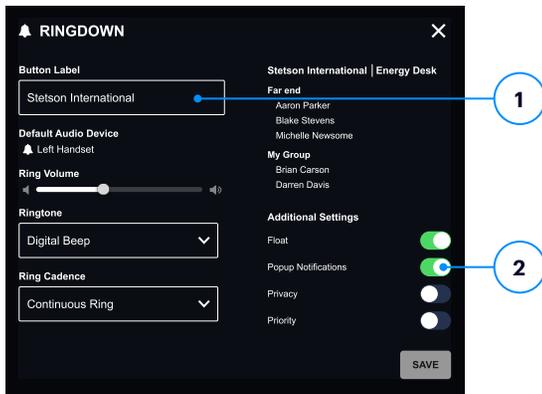
RIGHT-CLICKING ON A BUTTON (RINGDOWN)



- 1 Can toggle between devices depending on how a user had setup their audio devices. Default device is highlighted in blue
- 2 Enabling float allows you to see/answer incoming calls in your favorites Panel if the ringing line is not on a visible page
- 3 Turn privacy on/off
- 4 Adjust the incoming ring volume

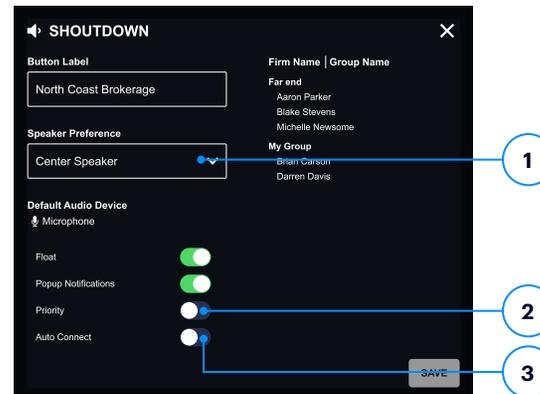
Buttons (continued)

RINGDOWN



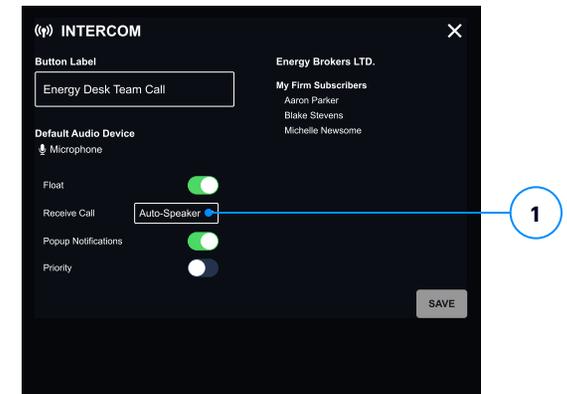
- 1 **Button Label:** User can edit the Button Label
- 2 **Pop-up Notifications:** Enables a Pop-up Notification to see incoming calls when application is minimized

SHUTDOWN



- 1 **Speaker Preference:** adjust to which speaker the Shutdown is heard from
- 2 **Priority:** Changes incoming ring Flash to a brighter red
- 3 **Auto Connect:** opens microphone when Shutdown is active

INTERCOM



- 1 **Receive Call Options**
 - **Ringng:** You hear a ring tone when a someone calls you and you can pick up whenever you want
 - **Auto Answer:** You are automatically connected to an incoming call and your microphone is already turned on ready for you to talk
 - **Auto Speaker:** An incoming call is released so you can hear the call participants, but your microphone is turned off

Community

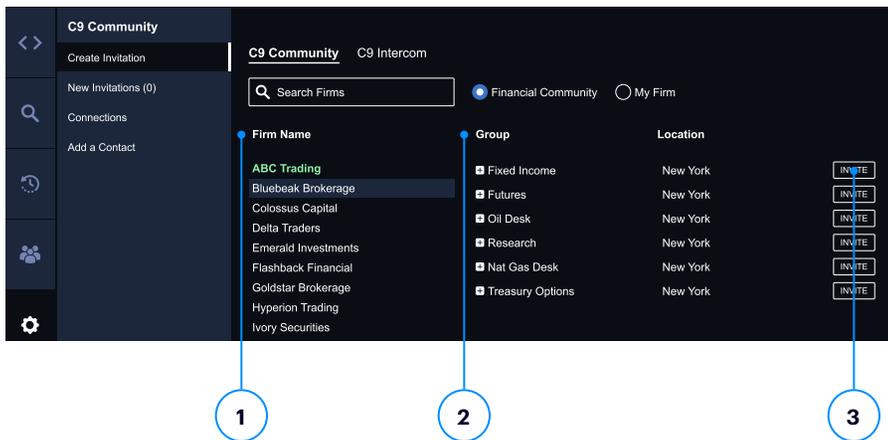
Where users create and manage invitations and existing connections.

CREATING EXTERNAL INVITATIONS

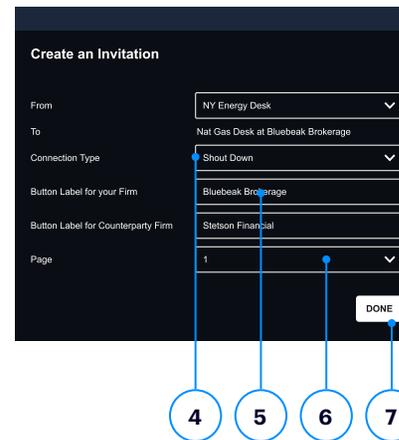
Creating invitations allow users to create Shoutdowns and Ringdown connections within the C9 community as well as for Intercom.

Clicking on the “Invite” button opens the create an invitation screen.

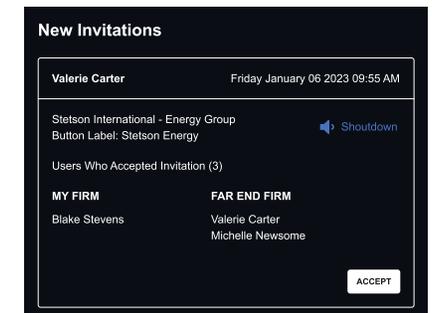
Once the invitation has been sent, the Far End user will receive an invitation they can choose to Accept or Ignore.



- 1 Select a firm to connect with
- 2 Select a group within the firm
- 3 Click Invite



- 4 Choose the connection type
- 5 Label each side of the connection
- 6 Select page the connection will appear on
- 7 Click Done



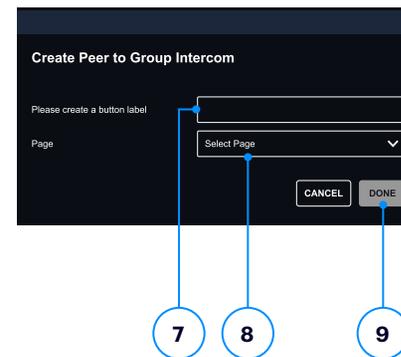
Invitations are only active for 24 hours. Afterwards the connection request will be available in the connections tab.

Community (continued)

CREATING INTERNAL INTERCOM CONNECTIONS



- 1 Go to Community tab from the navigation panel
- 2 Select C9 Intercom
- 3 User can use the search bar to search by groups and users
- 4 For Peer-to-Peer intercom, users need to check an individual name they want to invite. For Peer to Group, they can select a whole group or hit the + icon to view and select specific individuals in a group
- 5 Selected users and groups will appear on the right side of the page. Limit of 50 users on a group intercom
- 6 Hit the invite button

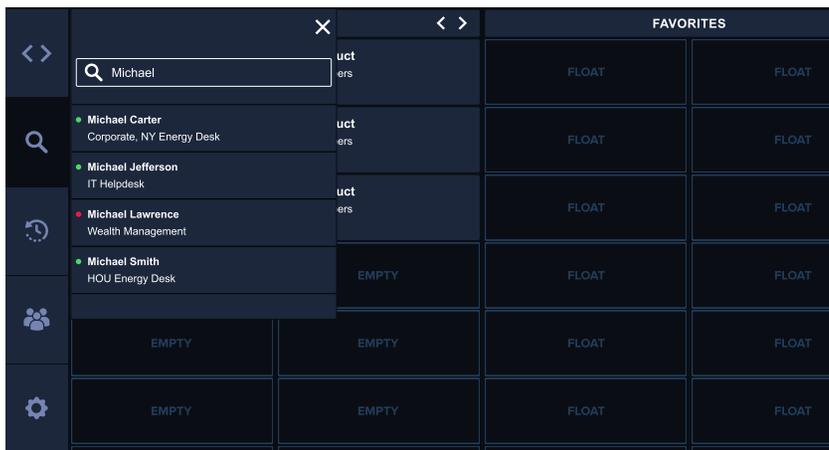


- 7 Intercom invitation pop-up allows the user to specify the name for the intercom but will auto populate the name of the selected user for peer-to-peer intercom connections
- 8 Page selection will need to be assigned for the intercom button
- 9 Press Done

C9 Intercom

Speak to anyone internally to your firm on Cloud9

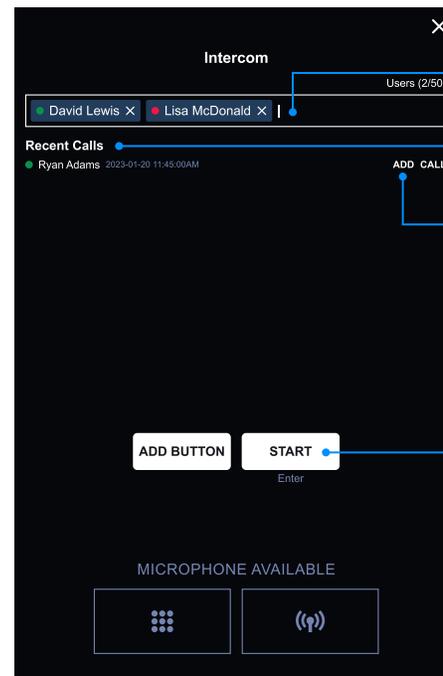
PEER-TO-PEER (P2P) CALLS FROM GLOBAL SEARCH



Make a Dynamic Intercom from Global Search

- Accessible from the Global Search button on the navigation bar
- Find users simply by entering their name into the search bar and click to intercom user
- **Color indicates presence**
 - **Grey:** User is not currently online
 - **Red:** DND is enabled
 - **Green:** User is available
- Have Ad-Hoc calls to internal team members without creating a button
- Recent dynamic intercom calls appear in the user's history and can be directly redialed from the history page and saved as a button

PEER-TO-GROUP (P2G) OR PEER-TO-PEER (P2P) FROM CALL WELL



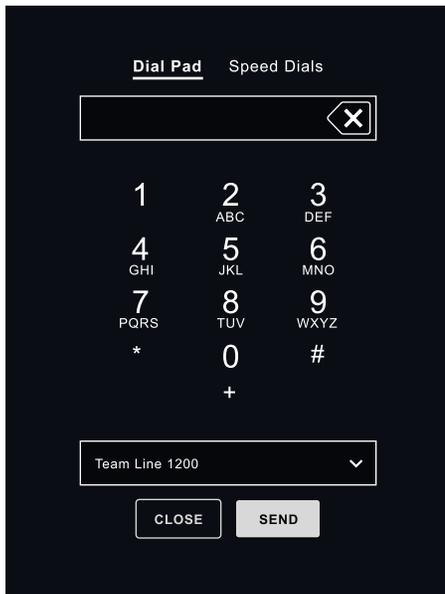
- 1 Global Search:** add up to 50 users or add groups of users to a new or existing intercom call.
- 2 Recent Calls:** view recent intercom call history and can add the user to a new call or can call the user back.
- 3 Add Button:** Create a button for the user or group that is selected
- 4 Start:** begin the intercom call with the selected user or group

Make a Dynamic Intercom from the call well

- Press the intercom option in the call well.
- Find users simply by entering their name into the search bar.
- **Color indicates presence**
 - **Grey:** User is not currently online
 - **Red:** DND is enabled
 - **Green:** User is available
- Press the start button to begin the call

Dialtone

ACCESSING THE DIAL PAD

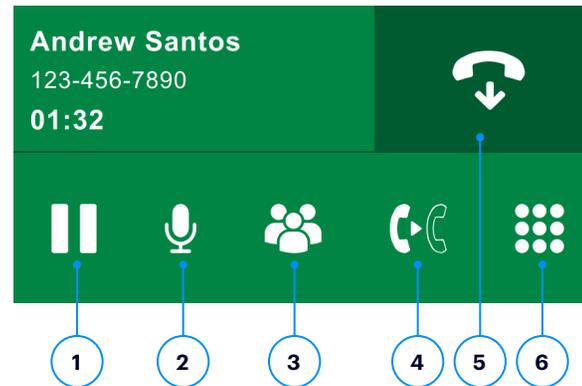


Each call well has an associated dial pad that opens from the call well that can be used to initiate a Dial Tone call.

Users can make a call from the dial pad or select speed dials

Users can select which line to ring out on such as a personal DID or Business DID.

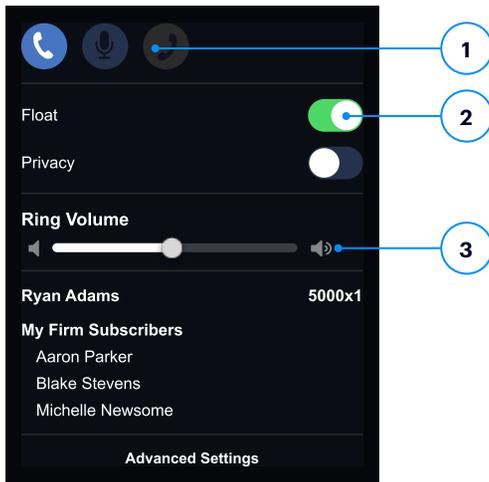
CALL WELL FUNCTION KEYS



- 1 **Hold:** Allows the user to place the call on hold by clicking the hold button. Active call will change color from green to yellow. To retrieve the call, select the line that is yellow.
- 2 **Mute:** A user can mute themselves by clicking the mute icon. The microphone icon will turn red and have a slash across when engaged.
- 3 **Conference Button:** Allows you to create a multiparty conference
- 4 **Transfer Button:** Allows you to transfer a caller to another user either attended or unattended.
- 5 **Release Call:** Disconnects the call.
- 6 **Dial Pad:** A user can bring up the dial pad to enter additional touch-tone digits while on a connected call.

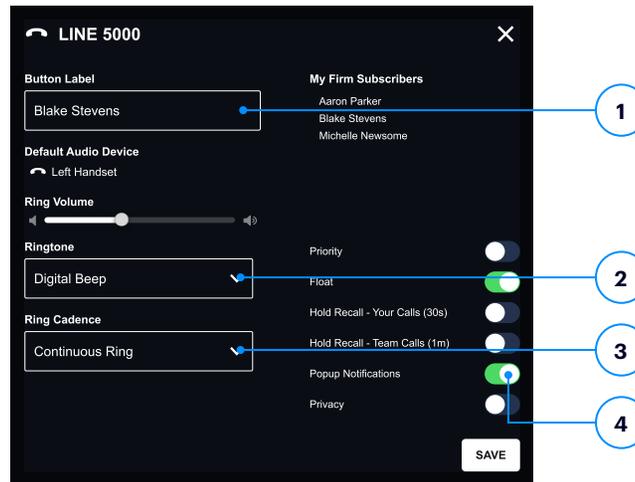
Dialtone Advanced Options

RIGHT-CLICKING ON A BUTTON



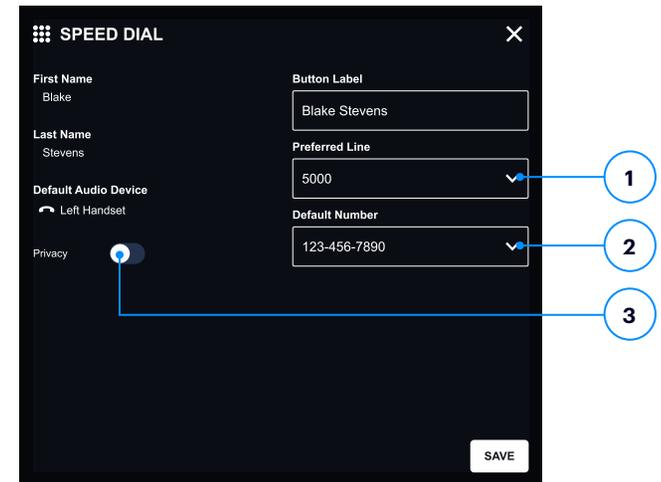
- 1 Toggle or Select Audio Devices:** Once selected it will automatically start or swap the call. Default device is highlighted in blue.
- 2 Float:** Enabling float allows you to see/answer incoming calls in your favorite panel if the ringing line is not on a visible page.
- 3 Ring Volume:** Increase or lower the ring volume

EXTENSION



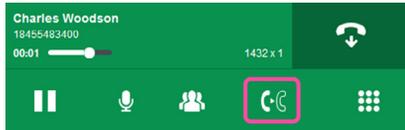
- 1 Button Label:** User can edit the button label
- 2 Ringtone:** Change the ringtone for that specific line
- 3 Ring Cadence:** Change how the line will ring, continuous, single or no ring.
- 4 Pop-up:** Enables a pop-up notification to see incoming calls when application is minimize

SPEED DIAL



- 1 Preferred Line:** Allows the user to select what line they want to dial out from
- 2 Default Number:** If a contact has more than one number, you can choose the default number to call from
- 3 Privacy:** Allow the call to be private so no other users can jump into the call

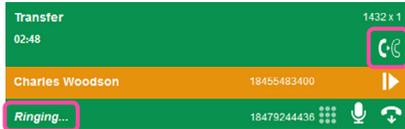
TRANSFER WORKFLOW



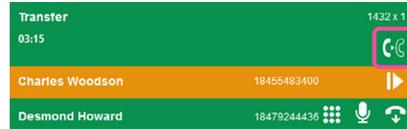
- 1 Initiate a call. Once connected, press the **transfer** icon



- 2 Using the **Dial Pad** or **Speed Dials**, initiate another call

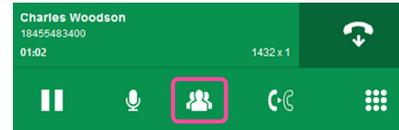


- 3 For an **unattended transfer**, press the transfer key. Then dial the number you wish to transfer to then wait for a ring and then press the transfer key to complete.



- 4 For an **attended transfer**, wait for the called party to pick up. Announce the caller and press the transfer key to complete.

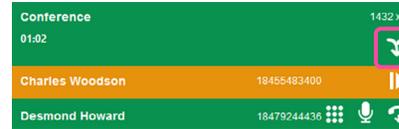
CONFERENCE WORKFLOW



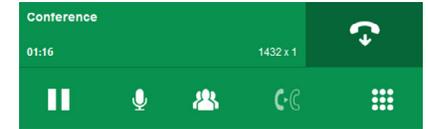
- 1 Initiate a call. Once connected, press the **conference** icon



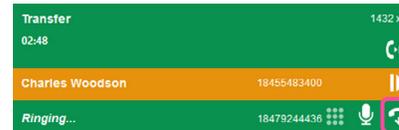
- 2 Using the **Dial Pad** or **Speed Dials**, initiate another call



- 3 Once connected, press the **merge** icon



- 4 Conference complete

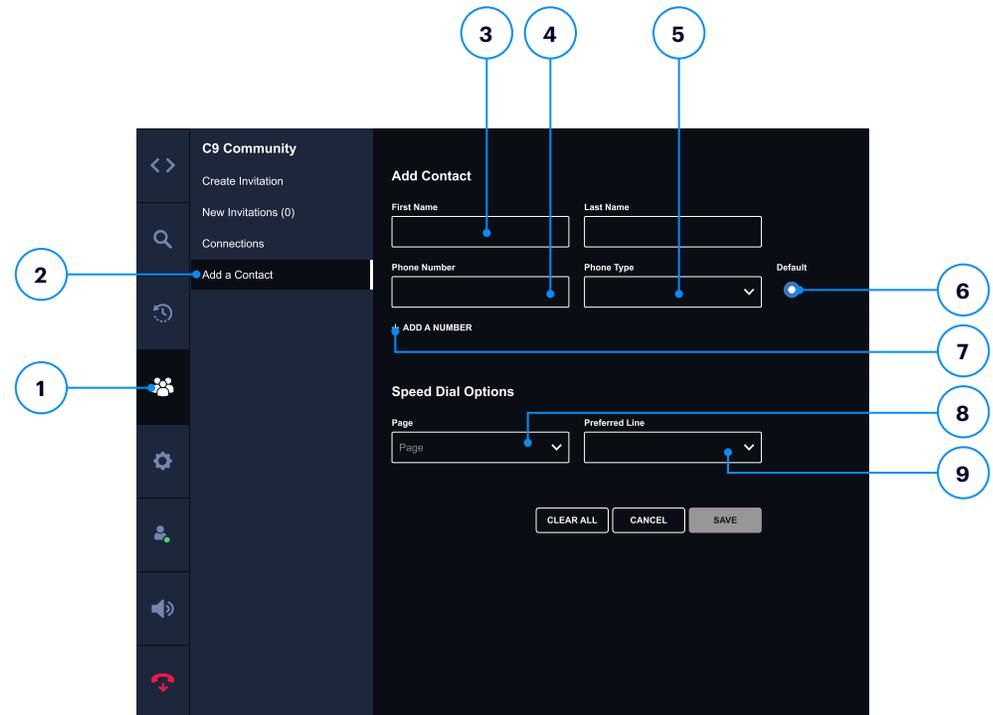


If far end party does not pick up, release the call and resume the first line, which will be on hold

ADDING CONTACTS FOR SPEED DIALS

Adding Contacts allows for a user to store “contacts” which are individuals with one or more associated phone numbers.

- 1 Select the C9 Community tab in the application
- 2 Select add a Contact
- 3 Insert at a minimum the first name of the contact you want to save
- 4 Input the phone number
- 5 Select the phone type
- 6 If there are multiple numbers for a contact, select which is the default
- 7 Select the + to add an additional number for the contact (supports up to 3 numbers)
- 8 Option to add the contact as a speed dial and select the page you would like to see the button on
- 9 Select the preferred line you would like to dial the speed dial from



The screenshot shows the 'Add Contact' form in the C9 Community application. The form is dark-themed and includes the following elements:

- 1**: C9 Community tab in the application sidebar.
- 2**: 'Add a Contact' button in the sidebar.
- 3**: First Name input field.
- 4**: Last Name input field.
- 5**: Phone Number input field.
- 6**: Phone Type dropdown menu.
- 7**: Default toggle switch.
- 8**: 'ADD A NUMBER' button.
- 9**: 'Speed Dial Options' section, including 'Page' and 'Preferred Line' dropdown menus.

At the bottom of the form are three buttons: 'CLEAR ALL', 'CANCEL', and 'SAVE'.

Learn how your firm can take advantage of higher-quality voice tools, connect to a global community instantly, and make better decisions faster. Contact us today at sales@c9tec.com