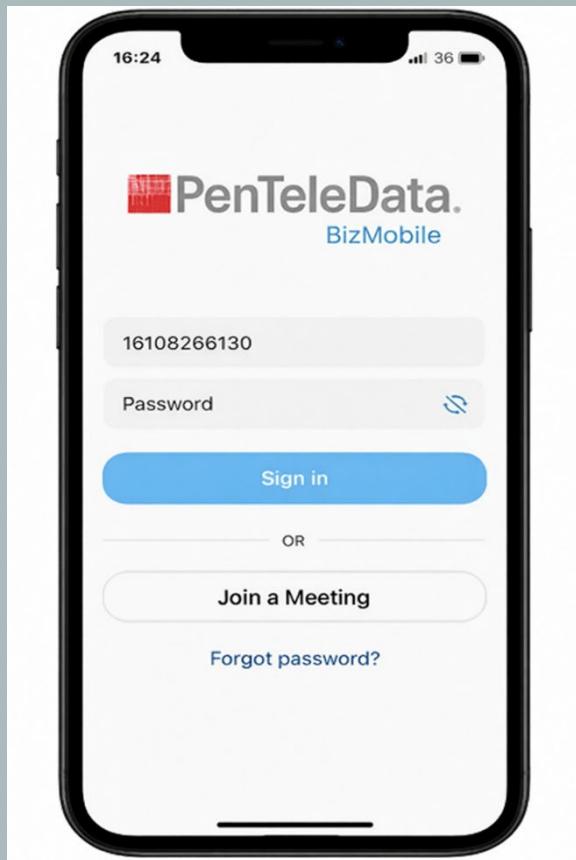




# PTD MyBizMobile User Guide



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# Getting Started

A PenTeleData VoIP service subscription is required to make calls with PTD MyBizMobile. Once your account is set up with PenTeleData, you will receive an email from PTD MyBizMobile with your username and password.

## System Requirements

Supported Devices	<ul style="list-style-type: none"> <li><b>Windows</b>- Windows 10, Windows 11. Only Pro and Enterprise versions are supported</li> <li><b>MAC</b>- macOS 13 (Ventura, macOS 14 (Sonoma), macOS 15.1 (Sequoia)</li> <li><b>IOS</b>- iPhones running iOS 16, iOS 17, or iOS 18. No iPad or iPod supported.</li> <li><b>Android</b>- Certain Android phones* running Android 13, 14, 15, or 16. No tablets, Google Pixel fold series, or Chromebooks are supported.</li> </ul> <p>*Samsung Galaxy S series and A series, as well as Google Pixel 5 and newer</p>
Supported Accessories	<ul style="list-style-type: none"> <li>Headset with microphone (including Bluetooth™): PTD MyBizMobile uses the earpiece and microphone on the headset.</li> <li>Headphones (no microphone): PTD MyBizMobile uses the earpiece on the headphone and the built-in microphone on the device.</li> </ul>

### VOIP OVER MOBILE & 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.

PTD will not be held liable for any charges, fees, or liability imposed by your carrier for use of VoIP over mobile and cellular data.

### EMERGENCY CALLS WARNING

MyBIZMobile products provide handling designed to redirect emergency calls to the native cellular dialer, when possible, on a best reasonable commercial-efforts basis. 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. As a result, the official position of PTD is that MyBIZMobile product is not intended, designed, or fit for placing, carrying, or supporting emergency calls. PTD will not be liable for any costs or damages arising either directly or indirectly from the use of the software for emergency calls. Using MyBIZMobile as a default dialer may interfere with dialing emergency services.

# Install and Sign In

To get started, download your cloud communications app the following locations:

[Google Play Store](#)

[Apple App Store](#)

[Windows PC](#)

[MAC PC](#)

A *Welcome* email that contains your login details was sent to you when your account was created. Click the link in that email to create your password, then open the app and sign in.

Remember to toggle on *Keep Password* and *Auto Login*.



## IOS PERMISSIONS

When prompted, give PTD MyBizMobile the following permissions:

- Allow PTD MyBizMobile to make and manage calls
- Allow PTD MyBizMobile access to your contacts
- Allow PTD MyBizMobile to access to the microphone
- Allow PTD MyBizMobile to send notifications

## Can't sign in?

- If you can't remember your password, click *Forgot your password?* and check your email for a link to reset it. If you don't receive that email, please contact [Customer Support](#).
- You can be signed in to the PTD MyBizMobile app on ten devices, such as your computer and mobile phone.

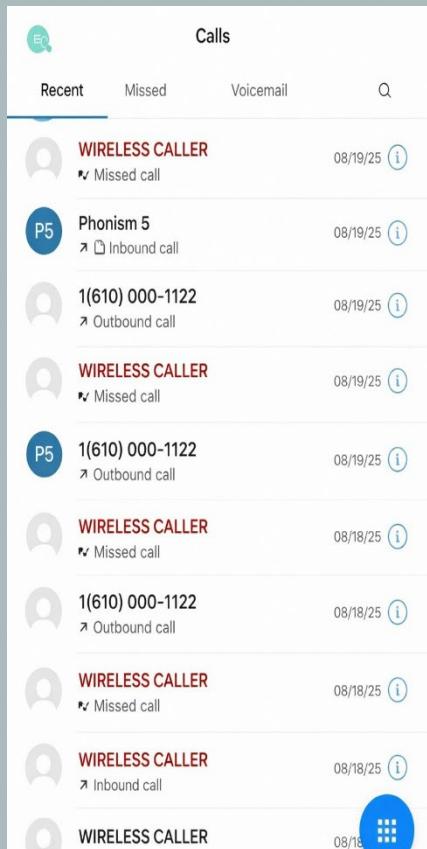
### Exit MyBizMobile

We recommend keeping **MyBizMobile** open in the background. To fully exit the MyBizMobile application, tap the profile icon in the bottom left of PC, or top left of mobile, and click "**Sign Out**".

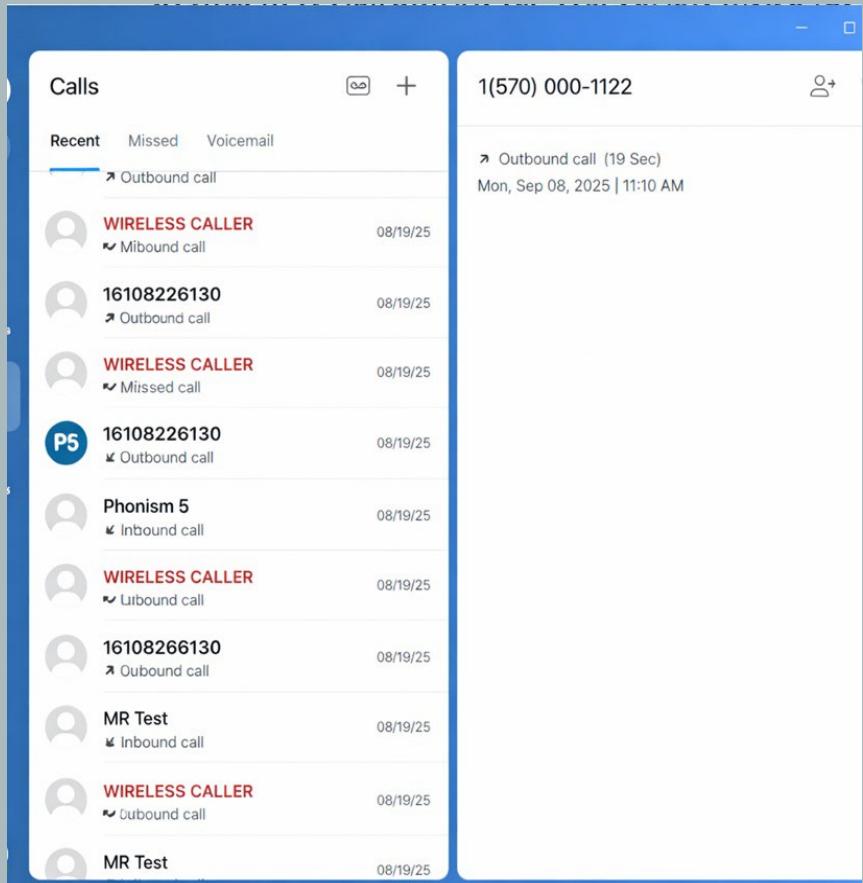
# Using PTD MyBizMobile

The screenshots in this guide are from an iPhone and Windows PC. While the device layouts and options on each platform may be slightly different, the features and functions are the same.

## iPhone 15+



## Windows 11 PC



## Making Calls

You can place a voice call from almost anywhere in the app. If you know the number, you can place a call from the dialer on the Phone tab. If you don't know a number, you can place the call from Contacts, History, or from a chat channel.

## Using the dialer

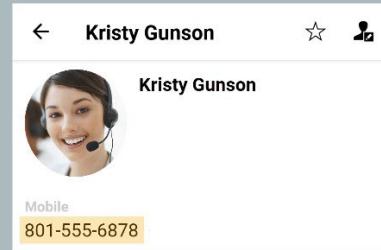


Type the name, phone number, or extension you want to call in the dialer field. As you type, PTD MyBizMobile will display suggestions for completing the entry. Tap a contact from the list to dial.

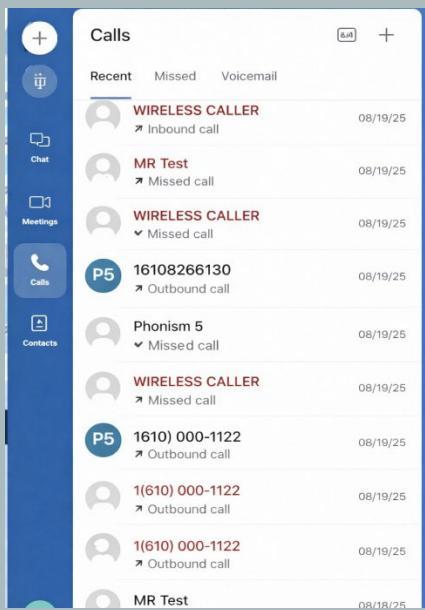
To redial a number, tap  Dial to bring up the last number you called and then tap  to Dial again.

## Using Contacts

In the Contacts tab, search for or locate a contact and tap on their name to open their contact details. Tap the number you want to dial, then choose Call to complete the call.



## Using Call History

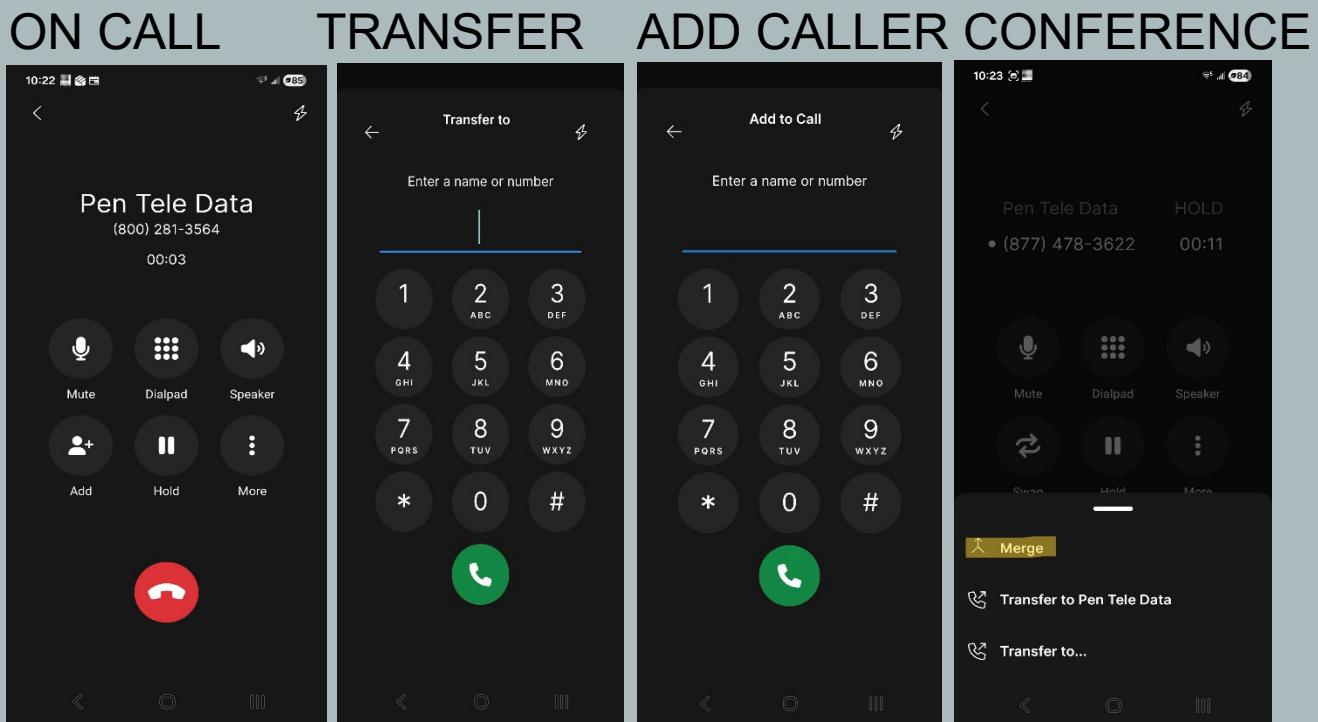


1. Go to the Calls tab and locate the entry containing the contact you want to call.
  - **ANDROID.** Tap Phone. Alternatively, long- press the entry containing the contact you want to call.
  - **IOS.** Tap the entry. Alternatively, tap Info next to the entry, then tap the number you want to dial.
2. Tap Call to dial.

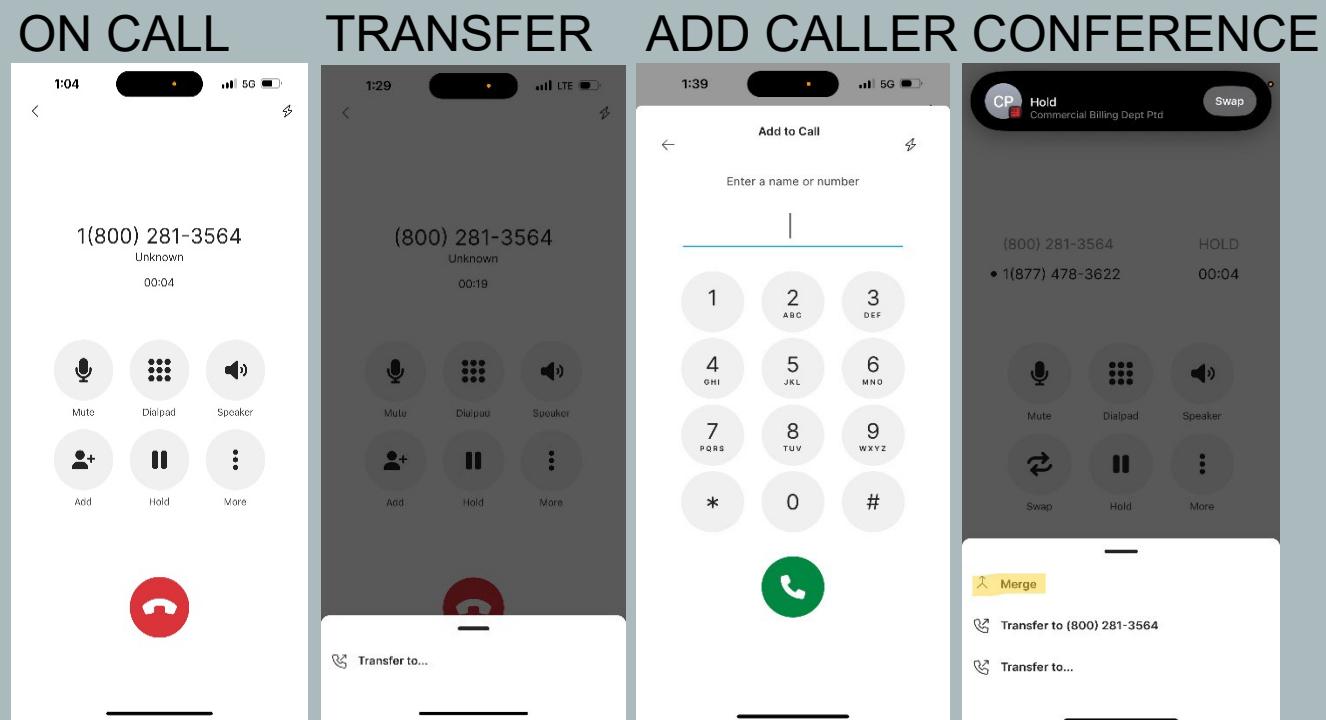
### CALL HISTORY SYNC

Call logs are synchronized between your devices. MyBizMobile downloads the logs in small increments as you scroll through the Call History. When a call is deleted from one device, the log is deleted from the server, so the change is reflected on both devices.

## Android call screens



## iPhone call screens



### LETTERS TO NUMBERS

Some phone numbers are given with words to help you remember them (1-800-NUMBERS). Rather than convert the letters to numbers, you can click letters into the dial pad and let MyBizMobile convert the letters to numbers when placing the call.

# Features

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## Call Transfer

In an unattended or blind transfer, you transfer the call to the target without talking to them first. An attended transfer occurs when you talk to the target before transferring the call. When you transfer a video call, the call is transferred as an audio call.

### Attended transfer

1. While on an established call, use any method to establish a second call to the target. PTD MyBizMobile automatically puts the first call on hold and dials the second call.
2. When you've finished speaking to the target, tap  More, then tap Transfer or Transfer to...
3. Don't hang up yet—Once the call connects the second party to the remote party, you will see Call Ended.

### Unattended transfer

1. While on an established call, tap  More, then tap Transfer or Transfer to...
2. If necessary, go to the Phone tab on the resource panel. Type the name or number of the person you want to transfer the call to and tap  Transfer.
  - **CONTACTS.** To select a contact from the Contacts tab, go to that tab on the resource panel (on Android, tap the Back button first), then search for or locate and tap on the contact you want to transfer to the call to, tap the number, and tap Transfer or Transfer to...
  - **HISTORY.** To select a contact from the History tab, tap  Phone on the group containing the contact you want to transfer the call to, then tap Transfer or Transfer to... Alternatively, long-press the contact entry, then tap Transfer to...
3. PTD MyBizMobile puts the remote party on hold while dialing the target. Once the call connects, PTD MyBizMobile ends the call between you and the remote party. If the target answers the call, the call continues between the target and the remote party. If the target declines, the call ends.

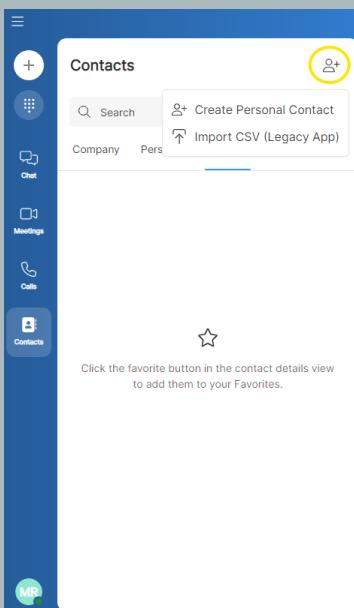
## Contacts

PTD MyBizMobile uses contacts saved on your device. PTD MyBizMobile contacts are continually synchronized with your native contacts, which means adding, modifying, or deleting a contact from one list updates the other list.

Colleagues are contacts that share their online status with you using an XMPP address or softphone number. These are pre-populated and managed by your system administrator. You can also exchange instant messages (IMs) with your Colleagues.

## Add contact

1. Do one of the following:
  - In the Contacts tab, tap  (Android) or  (iOS) to add a person to your contact list.
  - From the History tab, long-press an entry (Android) or tap  Info next to an entry (iOS), then tap Create New Contact or Add to Existing Contact. PTD MyBizMobile auto-populates the phone number.
2. In the Add Contact window, enter the contact's name, company, and email address. If necessary, tap  to add a phone number.
3. When you're done, tap  or Add. The contact is added to PTD MyBizMobile contacts and the device's native contacts.



## Delete contact

In the Contacts tab, tap a contact to view their information.

- **ANDROID.** Tap  More > Delete. Alternatively, long-press a contact and tap Delete.
- **IOS.** Tap Edit, then scroll to the bottom and tap Delete. Alternatively, swipe to the left and tap Delete Contact.

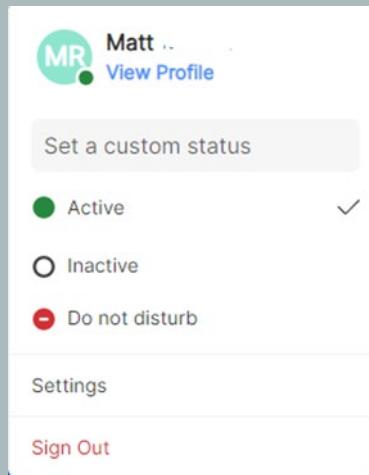
The contact will be deleted from both PTD MyBizMobile and the device's native contacts.

# Presence

PTD MyBizMobile allows you to share your online status (presence) with team members. Your status is displayed on the Messaging tab.

When PTD MyBizMobile is launched, your online status is Available. To change it, tap  next your status and select a new one: Away, Busy, Do not disturb, Appear offline. Optionally, type in a custom note to be displayed next to your status.

PTD MyBizMobile updates your status to “On the phone” when you make or receive a call and your status was Available.

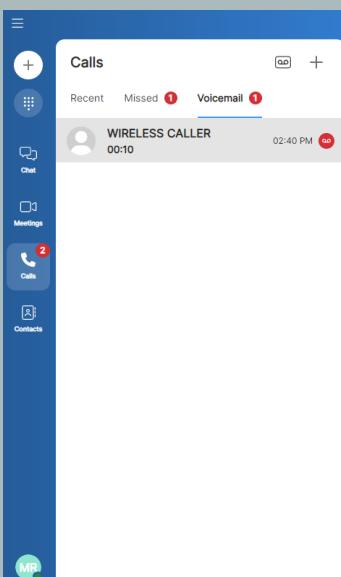


# Voicemail

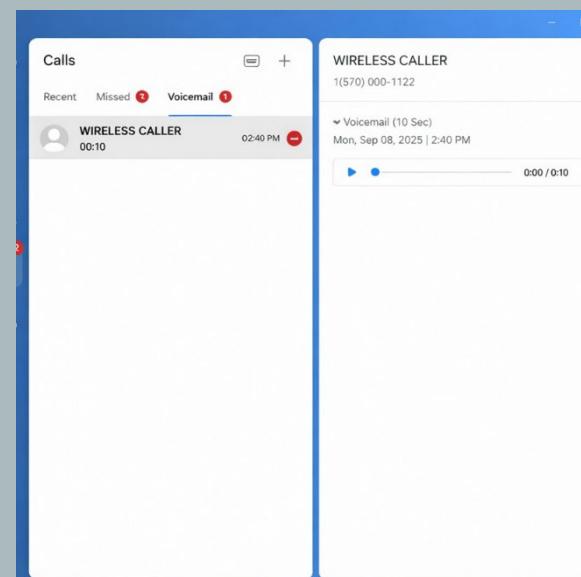
Voicemail is offered through your PenTeleData subscription, it is not part of PTD MyBizMobile. A small red number on the Phone icon indicates the number of new messages you have.

To access your voice messages, go to the Phone tab (phones) or the Dial Pad (tablets). Tap voice mail icon (Android) or Quick Start (iOS), then tap Voice Mail. Below are a Mobile Phone view and PC view.

Mobile Device View



PC View

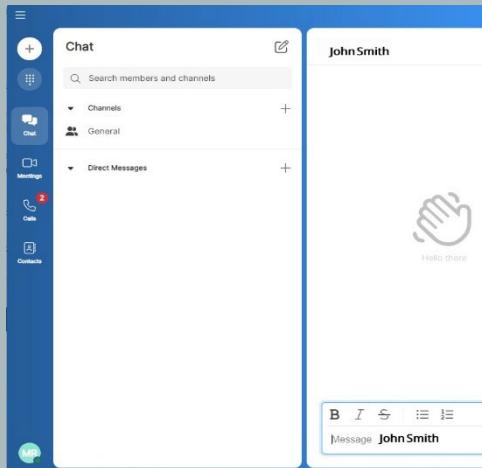


# Messaging

Instant messages (IMs) can be sent to a Colleague from the Messaging tab, the Contacts tab, the Favorites tab, from a chat room or an active call. PTD MyBizMobile will notify you when there is a new message or when you have been mentioned (@) in a chat channel. *The messaging feature only works within the application and cannot message outside the account.*

## Sending a Message

### New conversation



1. Go to the Chat tab and tap New message.
2. Tap Add (Android) or Compose (iOS).
3. Search for a Colleague and tap their name.
4. Compose your message and tap Send.

### Existing conversation

1. Do one of the following:
  - In the Messages tab, scroll through your conversations or search for the person you want to send a message to, then tap on the conversation.
  - From the Contacts or Favorites tab, tap a Colleague and then tap Send Instant Message. On Android, you can also long-press a Colleague and select Send IM.
  - During an active call, tap More > Send Instant Message.
2. Compose your message, then tap Send.

### Send Chat from a Channel

1. In the Chat tab, tap Channels then tap the chat room.
2. In the top right corner tap More > Members. Members in the toolbar.
  - **Android.** Next to the member you want to send a message to, tap the expand arrow and then tap message.
  - **iOS.** Tap the member you want to send a message to, then tap Send Instant Message.
3. Compose your message, then tap Send.

# Chat Channels

Chat channels are used when sending messages to multiple recipients. Chat channels can be private or public. Private rooms can only be joined by invitation from the group owner. Public rooms can be joined by anyone in the XMPP group.

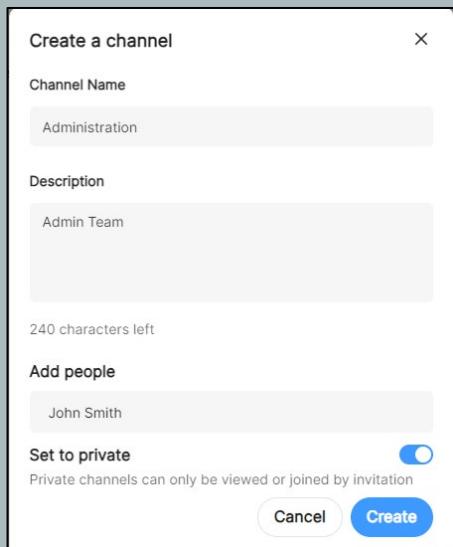
## Join a Channel

1. In the chat tab, tap Channels.
2. Tap  (Android) or  (iOS) then tap Join Room.
3. Tap the room(s) you want to join and tap  Add.

PTD MyBizMobile adds the public chat room(s) to the Rooms section of the Messaging tab.



## Create a channel



1. In the Messages tab, tap Rooms.
2. Tap  (Android) or  (iOS) then tap Create Room.
3. Choose if the new room will be private or public.
4. Enter the room name.
5. If the room is private, add participants.
6. Optionally, enter a description and topic.
7. When you're done, tap  to create the room.

Invited members are automatically added to the channel.

PTD MyBizMobile adds the channel to the “channel” section of the Chat tab.

## Edit channel settings

After a channel has been created, the channel owner can change the name and description, add new members, and add a topic. Both channel owners and members can change the topic.

1. Go to the Chat tab and tap the chat room you want to edit.
2. Tap  More > Channel Settings > Edit.
3. Make any changes as necessary, then tap  or Save.

# Admin Portal

On your account, in the Admin Portal, you can find:

[Call Screening](#) - Manage which phone numbers are allowed or blocked

[Call Handling](#) - Call forward, Find me, Do Not Disturb, and other call settings.

[Call Recording](#) (if applicable) - Record calls on demand or automatically.

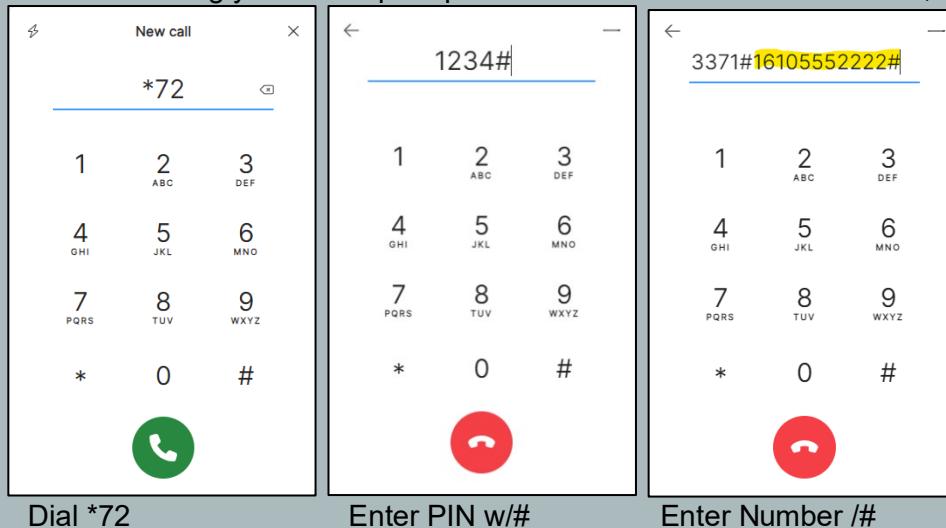
[Voice mail](#) - Create your own audio files for name and greeting or listen to voicemail.

[Account and device information](#) - Account name and number and caller ID.

## Features from the App

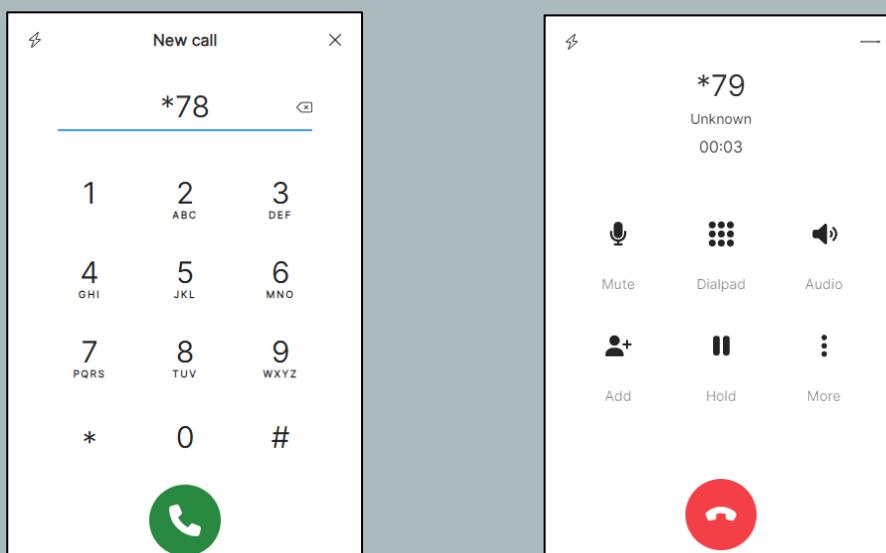
### Call Forward:

1. Dial \*72
2. Wait for prompt to enter PIN followed by the # sign
3. Wait for prompt to activate or deactivate call forwarding.
4. If activating you will be prompted for the number to forward call to, followed by the # sign.



### Do Not Disturb:

1. Enable - Dial \*78, a prompt will verify DND is enabled
2. Disable - Dial \*79, a prompt will verify DND disabled

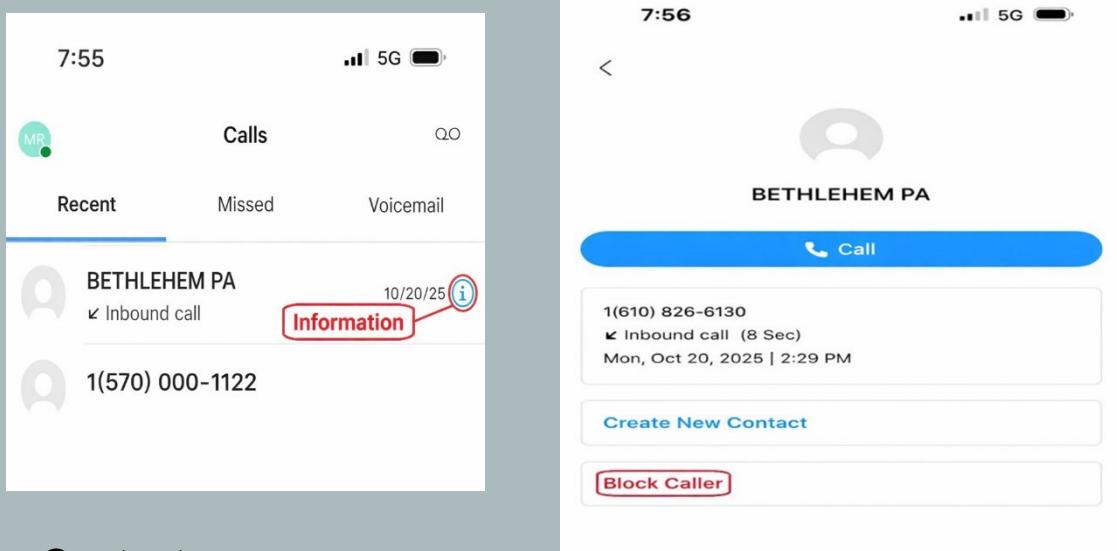


## Block a Phone Number

Block a phone number to stop receiving future calls.

### From Call History

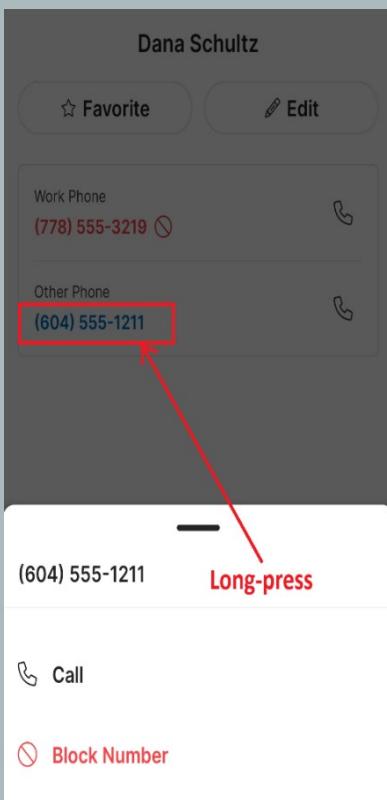
1. Go to the  **Calls** tab and select the number you want to block.
2. Select  **Information** then **Block Caller**.



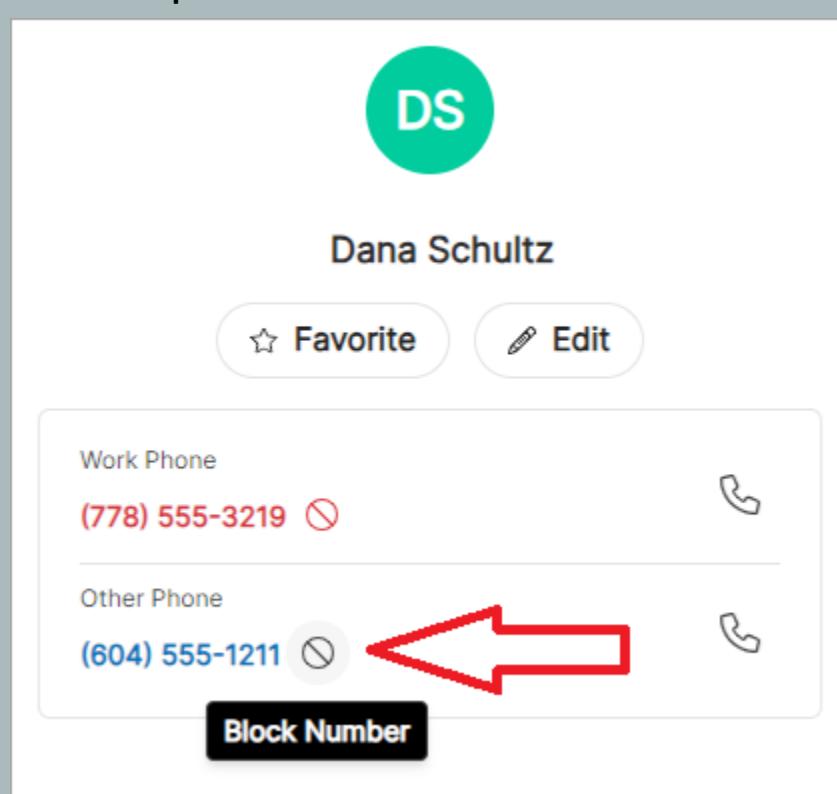
### From Contacts

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.

### Mobile



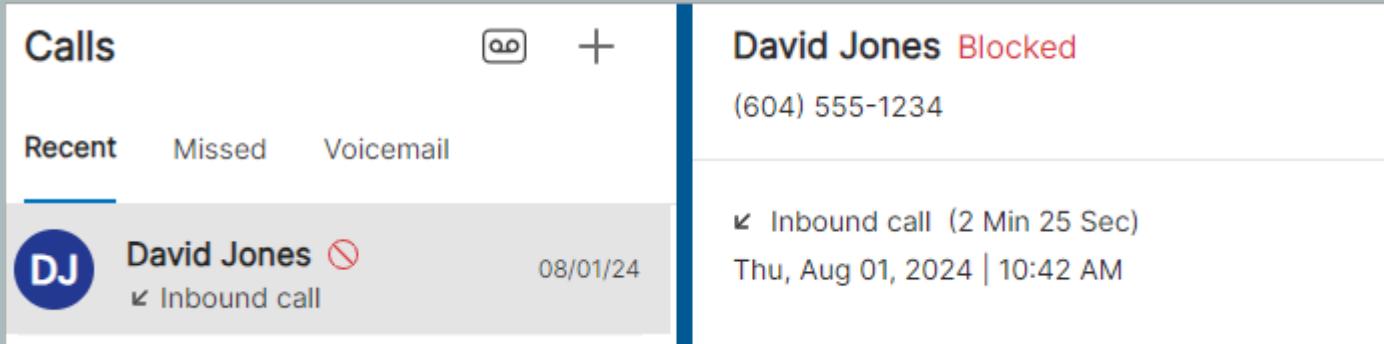
### Desktop



## 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.



The screenshot shows the 'Calls' tab in the MyBizMobile app. At the top, there are tabs for 'Recent', 'Missed', and 'Voicemail'. Below this, a list of calls is shown. One call from 'David Jones' is highlighted with a red 'Blocked' icon and red text. The call details are: (604) 555-1234, Inbound call (2 Min 25 Sec), Thu, Aug 01, 2024 | 10:42 AM.

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

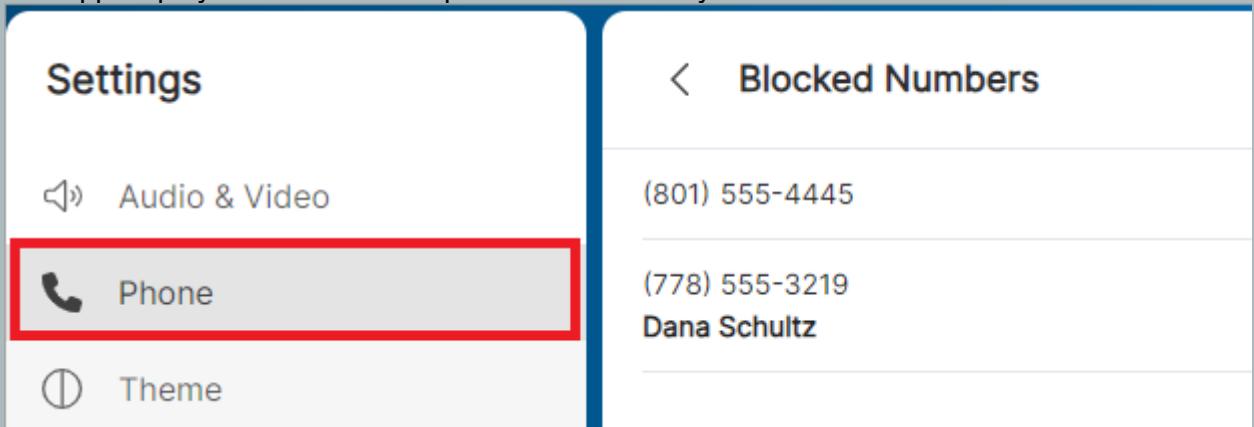
### From Contacts

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 MyBizMobile app, select your initials, Top left on mobile, bottom left on PC, then go to **Settings > Phone > Blocked Numbers**.  
The app displays a list of blocked phone numbers on your BCC account.



The screenshot shows the 'Settings' screen with 'Phone' selected. On the right, the 'Blocked Numbers' screen is shown, listing (801) 555-4445 and (778) 555-3219, both associated with Dana Schultz.

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

## Manage Devices

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You can log in to PTD MyBizMobile on 10 devices. If you need to switch to a new device, one of your old devices will need to be deactivated. If you need a deactivated device, please contact our [Customer Support](#).