

## Installing, configuring and using X-Lite Softphone (By Counterpath) on Windows

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### INSTALLATION AND CONFIGURATION

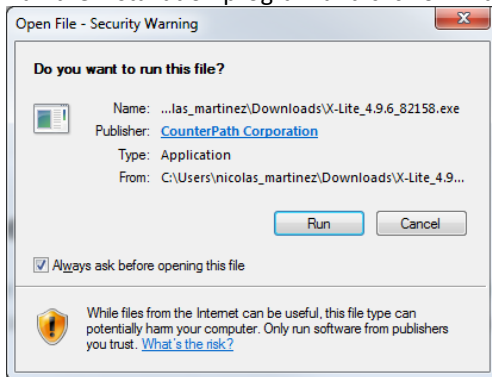
Download the software from:

<http://www.counterpath.com/x-lite-download>

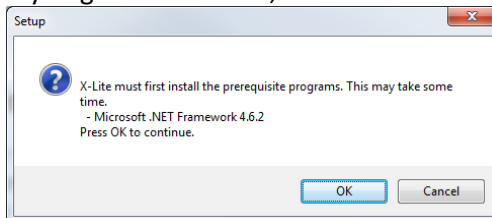
Once in the download page above, click on “here”:

**Download X-Lite 4.9 for Windows**

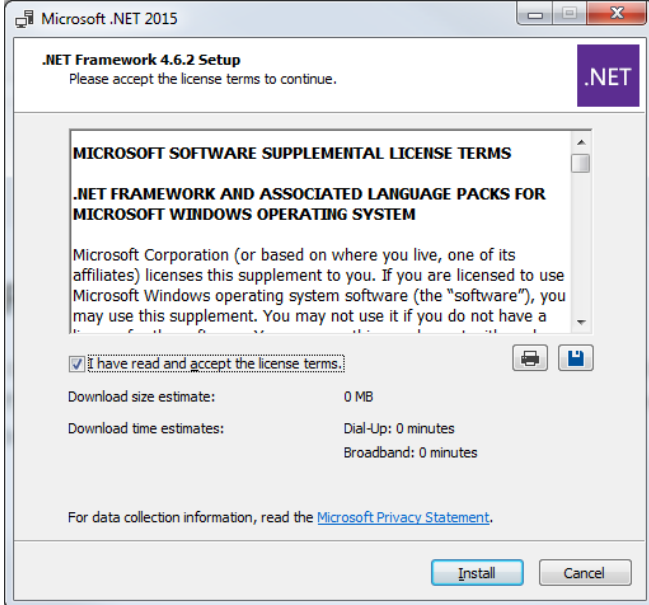
Run the installation program and click on “Run” when asked:



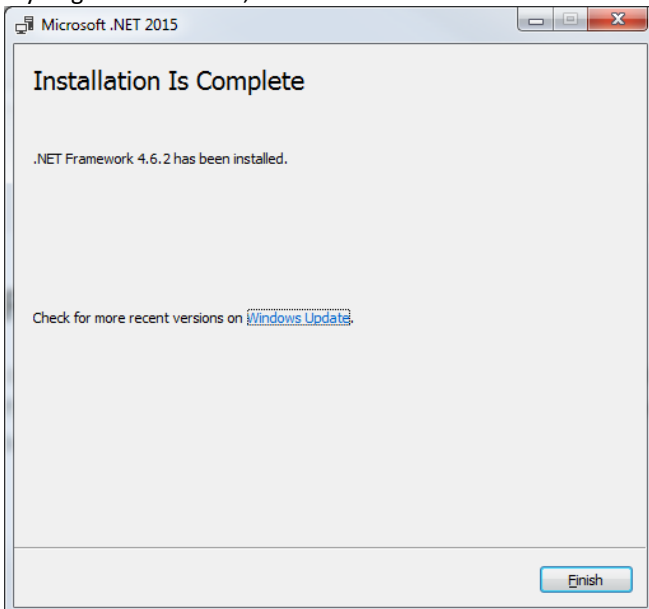
If you get this window, click on “OK”:



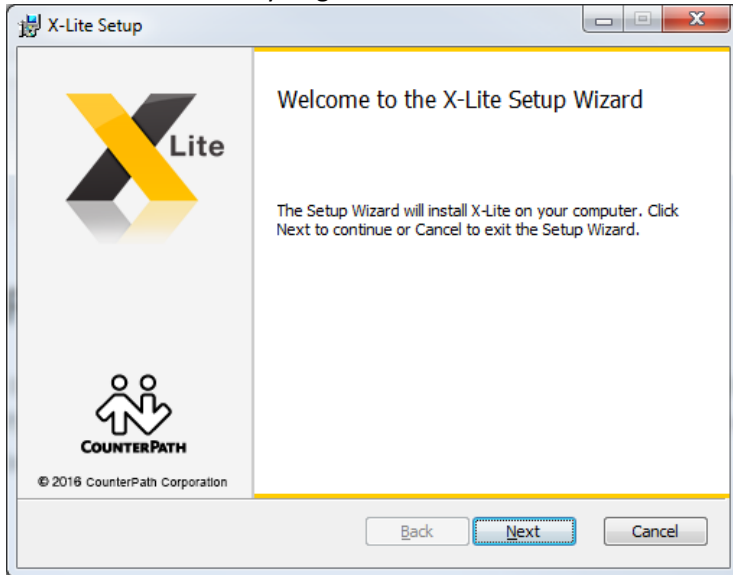
If you get this window, place a checkmark on “I have read and accept the license terms” and click on “Install”:



If you get this window, click on “Finish”:



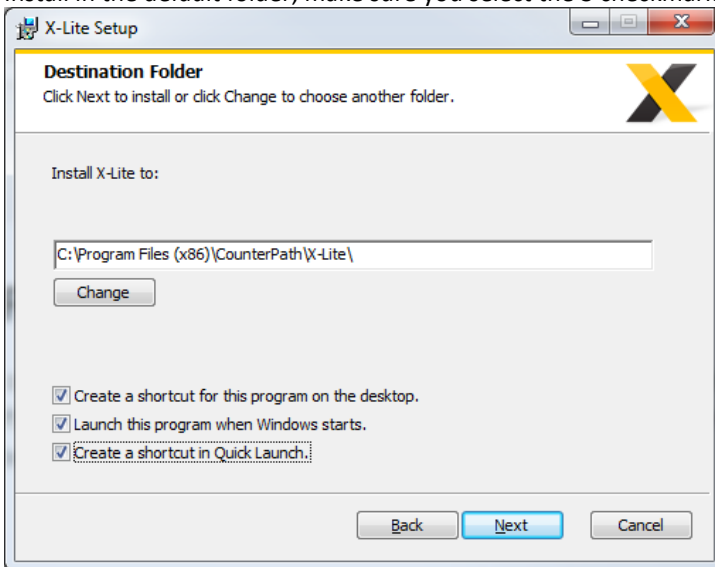
Click on “Next” when you get to this screen:



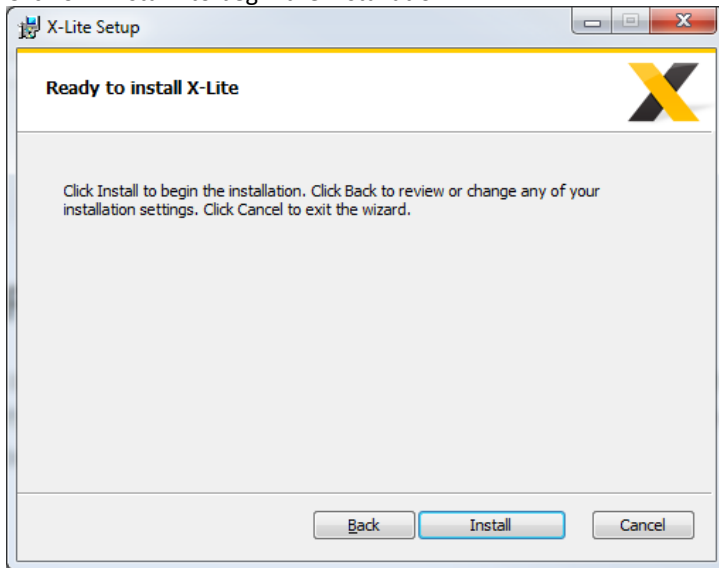
Accept the agreement and click "Next"



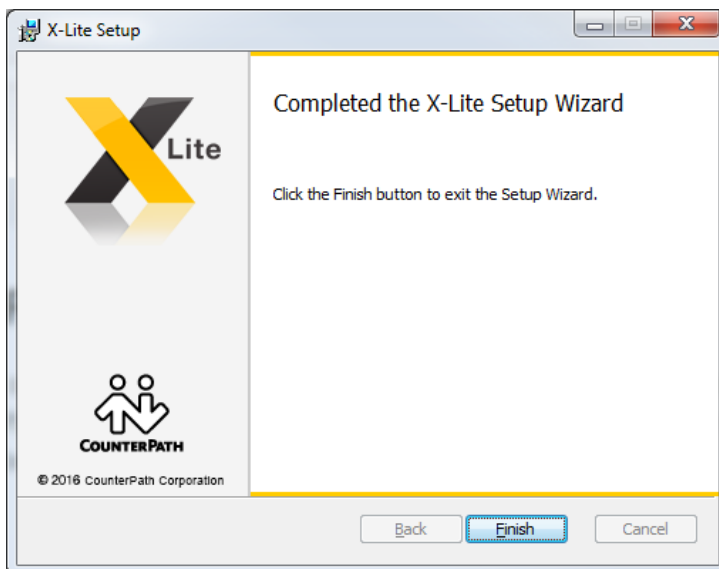
Install in the default folder, make sure you select the 3 checkmarks in the options below and click "Next"



Click on "Install" to begin the installation:

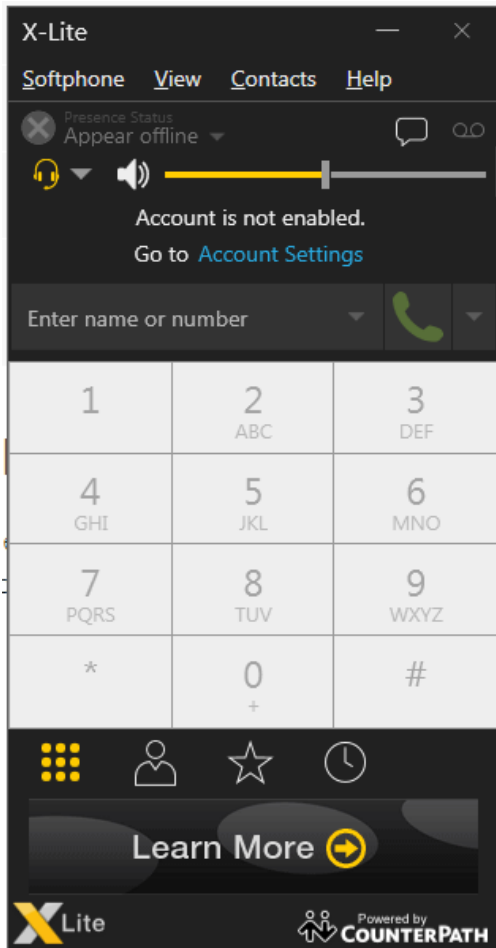


Click "Finish" when the installation ends:



Run the recently installed program.

To configure, Click on Softphone -> Account Settings or click on the Go to Account Settings blue text:





Enter the following information:

Account name: Your name or Extension number and your name depending on your preference. This will not affect the operation of the program.

User ID: Your extension number.

Domain: `xyyy.pbxonthecloud1.com:zzzz` where `xyyy` is your Company Code, which are the 4 letters that identify your company with PBX On The Cloud service. Normally `x` is the first letter of your Company name first word and `yyy` are the first 3 letters of your Company name second word. If your Company name has only one word, then `xyyy` will be the first 4 letters of the Company name. `zzzz` is the port where your server resides. Ask your PBX On The Cloud representative for it. Default is 5081.

Password: Your extension password. Ask your PBX On The Cloud representative for it. Be very careful to type the password correctly as if it is wrong, your extension will be blocked for ONE HOUR. (You can contact your PBX On The Cloud representative for help).

Display name: Your name or Extension number and your name depending on your preference. This will not affect the operation of the program.

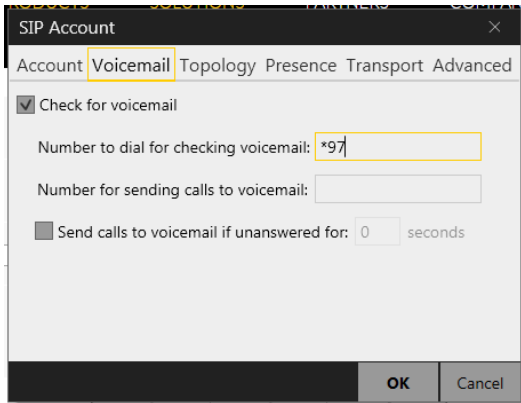
Leave all other fields unchanged.

A screenshot of a software window titled "SIP Account" with a close button (X) in the top right corner. The window has several tabs: "Account" (highlighted with a yellow border), "Voicemail", "Topology", "Presence", "Transport", and "Advanced". The "Account" tab is active, showing the following fields and options:

- Account name: Ext 613 PBX On The Cloud
- Protocol: SIP
- Allow this account for:
  - ☒ Call
  - ☒ IM / Presence
- User Details:
  - \* User ID: 613
  - \* Domain: xyyy.pbxonthecloud1.com:5081
  - Password: [masked with dots]
  - Display name: Ext 613 PBX On The Cloud (highlighted with a yellow border)
  - Authorization name: [empty]
- Domain Proxy:
  - ☒ Register with domain and receive calls
  - Send outbound via:
    - ☒ Domain
    - ☐ Proxy Address: [empty]
- Dial plan: #1\@a.T;match=1;prestrip=2;

At the bottom of the window are "OK" and "Cancel" buttons.

Click on "Voicemail" tab and type "\*97" in the "Number to dial for checking voicemail:"  
Click "OK"



The image shows a screenshot of a software window titled "SIP Account". It has several tabs: "Account", "Voicemail", "Topology", "Presence", "Transport", and "Advanced". The "Voicemail" tab is selected and highlighted with a yellow box. Inside this tab, there is a checked checkbox labeled "Check for voicemail". Below this, there are two input fields. The first is labeled "Number to dial for checking voicemail:" and contains the text "\*97", which is also highlighted with a yellow box. The second is labeled "Number for sending calls to voicemail:" and is empty. Below these fields is a checkbox labeled "Send calls to voicemail if unanswered for:" followed by a small input field containing the number "0" and the text "seconds". At the bottom right of the window are two buttons: "OK" and "Cancel".



## USING THE SOFTPHONE

### TO ADD CONTACTS

Click on the Contacts Tab in middle of the window and then click on “Add Contact” icon:

The screenshot shows a 'Contact Profile' window with the following elements:

- Header:** 'Contact Profile' with standard window controls (minimize, maximize, close).
- Profile Section:**
  - A blue silhouette icon with a dropdown arrow.
  - Group:** A dropdown menu currently set to 'Work'.
  - Primary presence:** A dropdown menu set to 'None'.
  - Primary phone number:** A dropdown menu set to 'None'.
- Contact Section:**
  - A tab icon and the label 'Contact'.
  - A dropdown menu set to 'Work' and a text input field containing '528102'.
  - An 'Add' button.
  - \*Display name:** A text input field containing 'EXATEC Monterrey'.
  - First name:** A text input field containing 'EXATEC'.
  - Last name:** A text input field containing 'Monterrey'.
  - A large empty text area.
  - A 'Remove' button.
- Footer:** 'OK' and 'Cancel' buttons.

Select the desired Group (Family, Friends or Work)

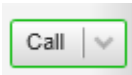
Fill the Display name, First name, last name, Phone location (Work, Home, Mobile, etc) and phone number and then click “Add” and “OK”.



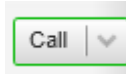
#### TO DIAL AN EXTENSION OR PHONE

Double click on the Contact (If defined previously) or:

Type the extension or phone number you want to dial in the “Enter name or number” field and hit <Enter> or click



or click on  and press the digits of the extension you want to call and hit <Enter> or click



When the call is established, you have this options:



To mute/unmute your microphone, press:



To put the call on hold, press:



To resume the call, press:



To hangup, press:




To switch between Speaker or Headset mode:



To mute or unmute the speaker or adjust the volume:




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

Look for this icon:  and click on it. In this case, it indicates you have 1 voice mail.

You will be asked for your extension voice mail password followed by the # sign (1234# by default). You should change this voice mail password the first time you use the system. Hear the instructions to do it.

#### TO CHECK FOR MISSED CALLS:

Look for this icon:  and click on it. In this case, it will indicate you have 1 missed call.



#### TO TRANSFER A CALL TO ANOTHER EXTENSION

Dial ## and the extension number you want to transfer to and dial #.

#### TO DO A CONFERENCE CALL

Once the first call is established, press:



Select "Invite to Conference Call"

Type the phone number in the "Enter name or number" field

A screenshot of a user interface element. It consists of a text input field with the placeholder text "Enter name or number" and a downward-pointing arrow on the right side. To the right of the input field is a button labeled "Add" and a small "X" icon.

the "Add" button

or

Double click on the second Contact Name and once the call is established, press the



and select "Merge Calls"