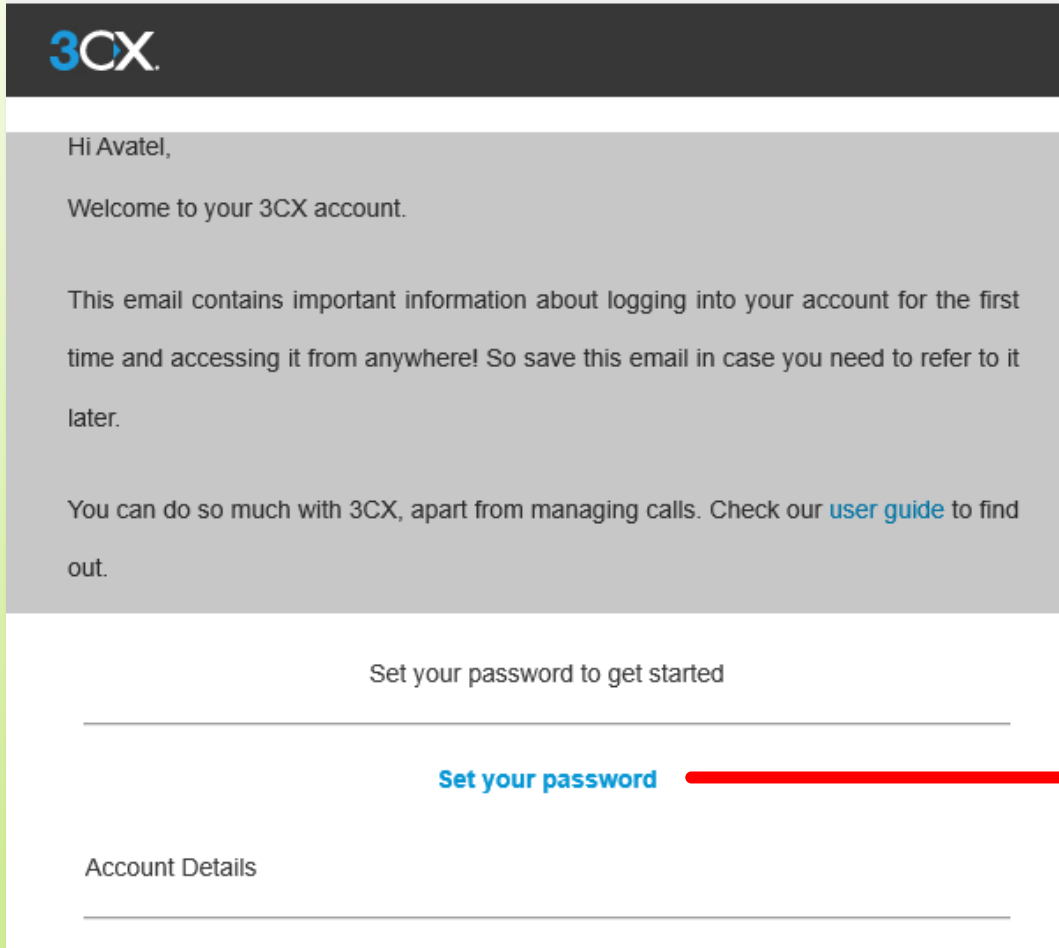


3CX Desktop App





Welcome Email



Open your 3CX Welcome email and click the "Set your password" link. Passwords for 3CX systems must be at least 10 characters in length. Spaces are not allowed.

3CX Team

Search people or enter number ... All

BM	Bresse, Michael 1144 Available	BR	Buggs, Rujel 1113 Available	CK	Campbell, Kasey 1138 Available	CA	Cohen, Andrew 4606 Away
CE	Cordless, Engineering 0002 Available		Damiani, Jon 1130 Available	F	Favata, Johann 1023 Do Not Disturb	GE	Guzman, Evelyn 1114 Available
ML	Martinez, Laura 1116 Available	MS	Miller, Salena 2118 Available	PF	Peraza, Frank 1019 Available		Perez, Chris 1126 Remote
PO	Phone, On Call 2133 Available	SM	Seehoffer, Mitch 1140 Available	TS	Thompson, Shanese 4645 Available	VC	Vanhorn, Charlie 1122 Remote
WD	Woodford, Deb 1135 Available						

← Click on "Apps"

Apps



Install App



iOS App

3CX app for iOS lets you take your office extension along for the ride no matter the destination! Access your company phonebook, make and receive calls, chat with colleagues, attend to customers with website live chat, and hold a video conference from the palm of your hand.



Chrome Browser Extension

With the 3CX extension, Click2Call functionality enables telephone numbers on any webpage or CRM system to be 'hyperlinked' allowing a simple click to initiate the call instead of copying and pasting.



Windows App

Make calls, view the status of colleagues, chat, schedule a video conference and check voicemail from your desktop.



1. Select "Windows App"



Install the 3CX App!

Voice/Video call and chat with colleagues

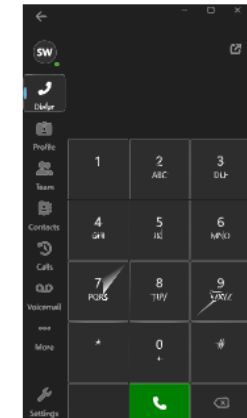
1. Install the [Windows App](#) or search "3CX" using Microsoft Store



2. Once installed, provision the app using the Provision button

Provision

2. Click on the Microsoft button to install from the store.



OK



Provision

3CX URL

Login Credentials

[Forgot password?](#)

Or Sign in

Softphone Apps

Android App
The 3CX smartphone app for Android allows you to take office communications with you wherever you go. Access company phonebook, make calls, answer incoming customer messages and more, all from the palm of your hand.

Windows App
Take calls, view the status of colleagues, chat, schedule a video conference and check voicemail from your desktop.

Web Apps

Web App (PWA)
Never miss a call or chat again by switching your 3CX Web Client to "Always on" mode. Install this Web Client as a native app on your desktop and you'll be notified of inbound calls and chats without installing any software on your machine.

Install the 3CX App!

Voice/Video call and chat with colleagues

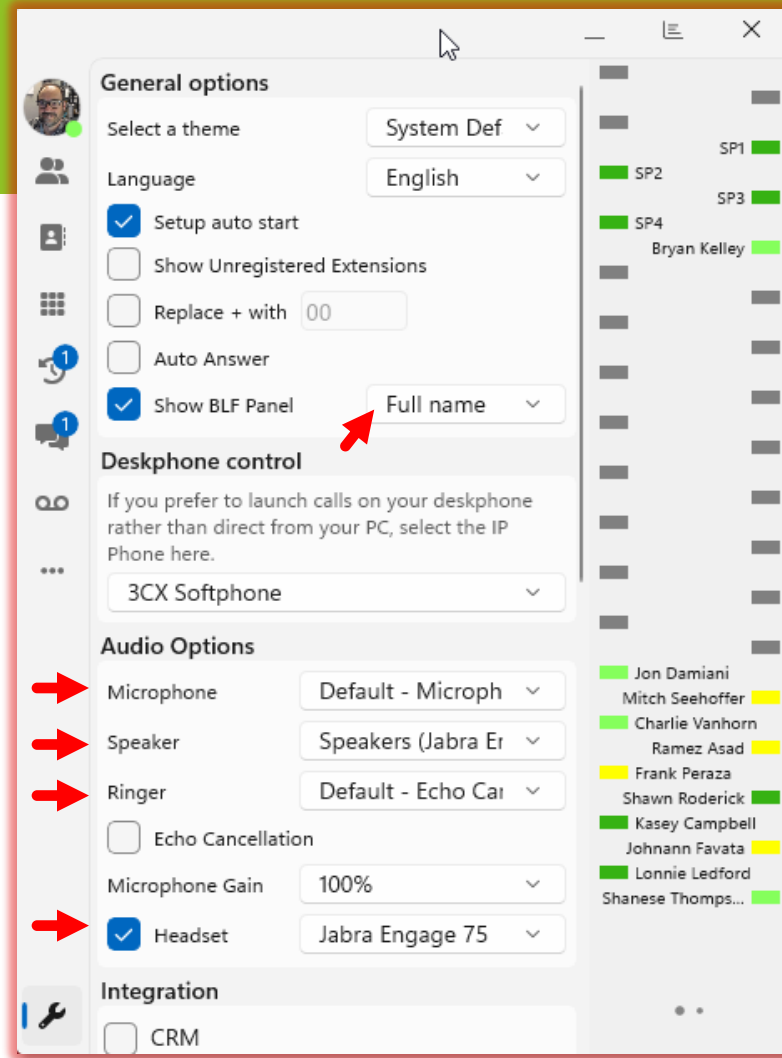
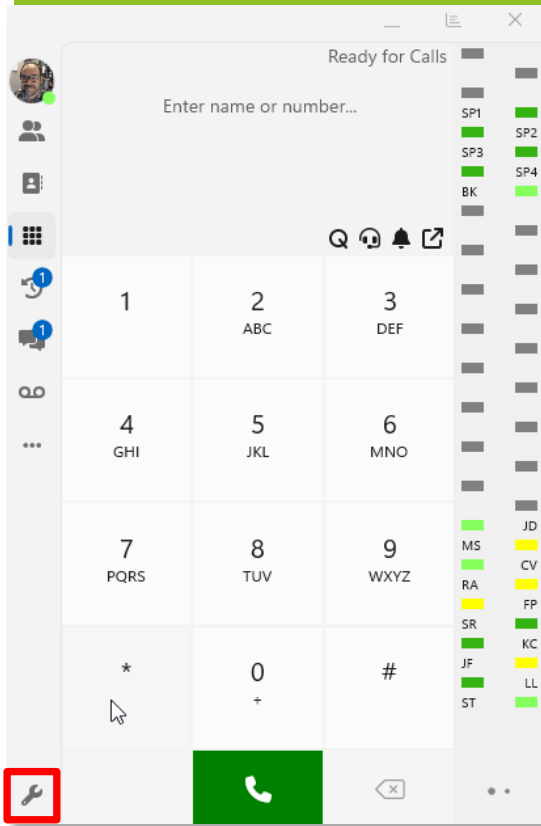
1. Install the [Windows App](#) or search "3CX" using Microsoft Store
2. Once installed, provision the app using the Provision button

Open 3CX?

https://avatel.3cx.us:5001 wants to open this application.

Always allow avatel.3cx.us:5001 to open links of this type in the associated app

After installation, the app will need to be provisioned. Click on the "Provision" button and click on "Open 3CX".



Settings

Audio Configuration Tips:

- If your headset includes dedicated software (e.g., Jabra, Poly), ensure it is installed and functioning properly with your PC before adjusting settings in the 3CX application.
- Configure your audio settings in **Windows Sound Settings** for personal use prior to making changes in the app.
- Within the 3CX app:
 - Set your **headset** as the device for the **Speaker** option.
 - Set your **PC speakers** as the device for the **Ringer** option to ensure incoming calls are audible even when you're not wearing the headset.
- Enable the **headset integration** option and select the appropriate software (e.g., Jabra, Poly) if applicable.
 - If you're using a generic headset without software, this option may be left unchecked.

Please click on "Settings" and apply the configurations as shown in the image above.



Functions

Team View

Contacts

Keypad

Call History

Chat

Voicemail

Additional Features
Note: "Meet" only works with the webclient.

Settings

Ready for Calls

Enter name or number...

Log in/out of Queue

Ringer on/off

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
*	8 TUV	9 WXYZ
	0 +	#

- Meet
- Recordings
- About

Jon Damiani

Mitch Seehoffer

Charlie Vanhorn

Ramez Asad

Frank Peraza

Shawn Roderick

Kasey Campbell

Johnann Favata

Lonnie Ledford

Shanese Thomps...

Custom Button Panel

Call

Backspace



Manager Panel

Status

The Status feature saves time and increases efficiency by seeing which colleagues are available to take calls and setting your own status to avoid distractions.

The status indicator is located in the bottom right corner of your profile picture. The color in the box states the status of the contact.

To change your status you can select a different status from the drop down menu:

- **Available** - Will ring on every device except mobile app
- **Away**
- **Do not disturb**
- **Mobile On** - Will ring on every device including mobile app
- **Out of Office**

Configure

The configure setting allows you to setup Call Forwarding and to also Manage multiple 3CX accounts.

Call Forwarding

When selected you can edit each status and direct calls to your preference. You can also customize a status message for everyone to see.

Manage Accounts

If you have more than one account you can add additional accounts within this section.

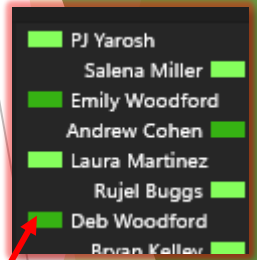
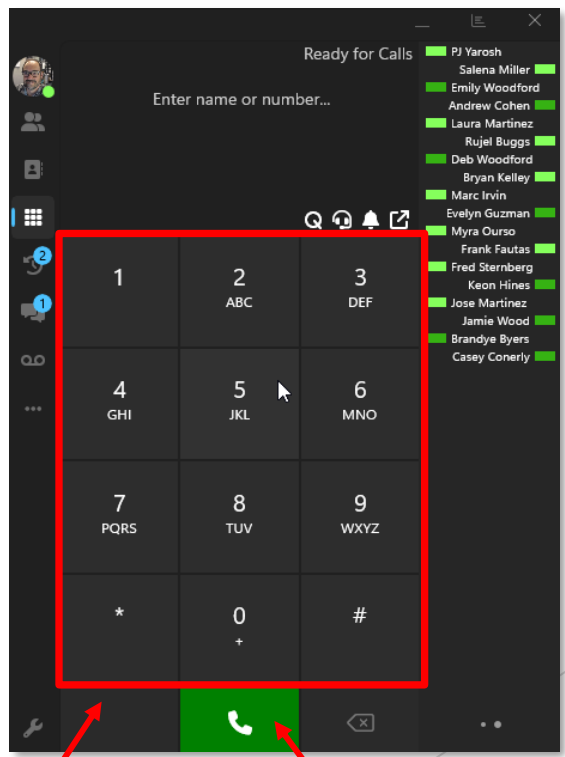
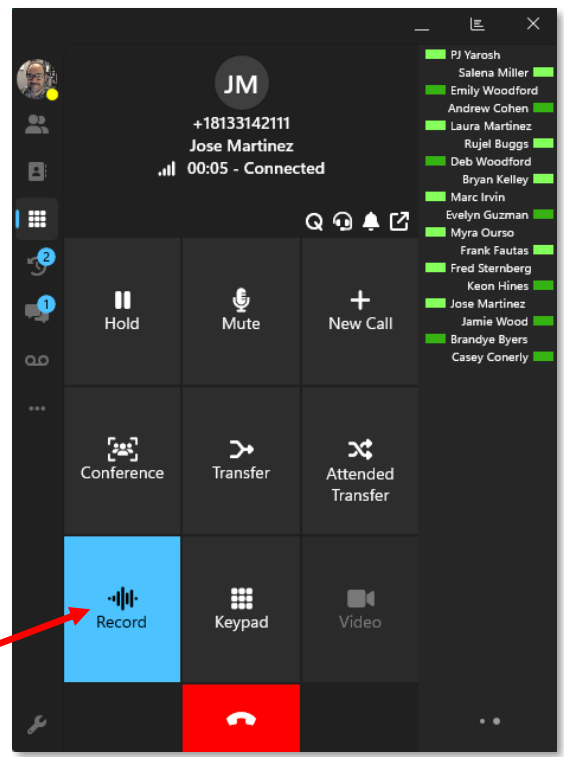
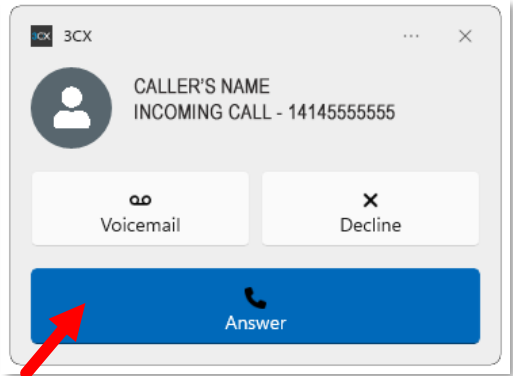
The screenshot displays the 3CX Manager Panel interface. A red arrow points from the profile picture in the top left to a dropdown menu. The dropdown menu includes the following options: Logout from Queue, Ringtone, **Set status** (highlighted), Available, Away, Do Not Disturb - On a conference..., Mobile On, Out of Office, Set status temporarily, Monitor Connection Quality, and Configure. A second red arrow points from the 'Set status temporarily' option to a dialog box titled 'Set status temporarily'. This dialog box contains a dropdown menu for 'Set status temporarily' (currently set to 'Away'), a 'For' dropdown menu (set to '15 min'), a text input field for 'Set status message', and 'OK' and 'Cancel' buttons. A third red arrow points from the 'Configure' option in the dropdown menu to a sub-menu containing 'Call Forwarding' and 'Manage Accounts'.



Answering & Placing Calls

PLACE A CALL

ANSWER A CALL



Record call on/off
**Must be enabled by system administrator.*

Hang up

Use keypad to dial an internal or external number

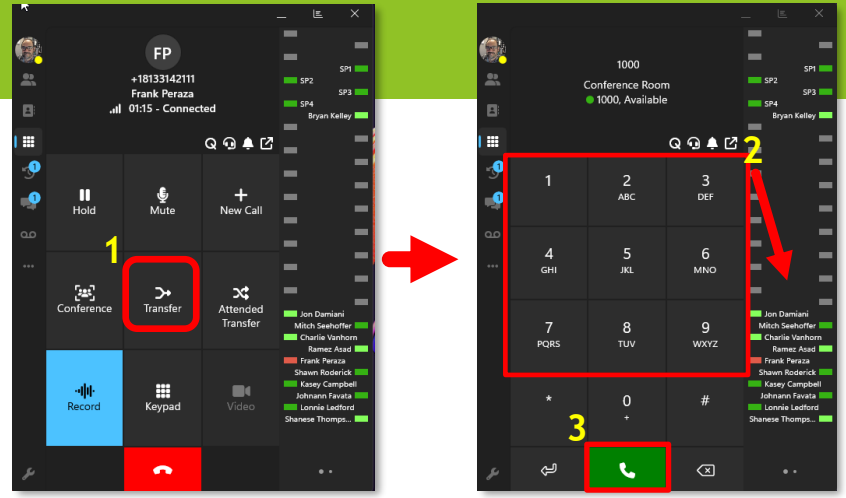
Call

Press BLF to make internal calls
** Custom BLF buttons can be created to dial outside numbers. Please see system administrator.*



Transfer Calls

BLIND TRANSFER

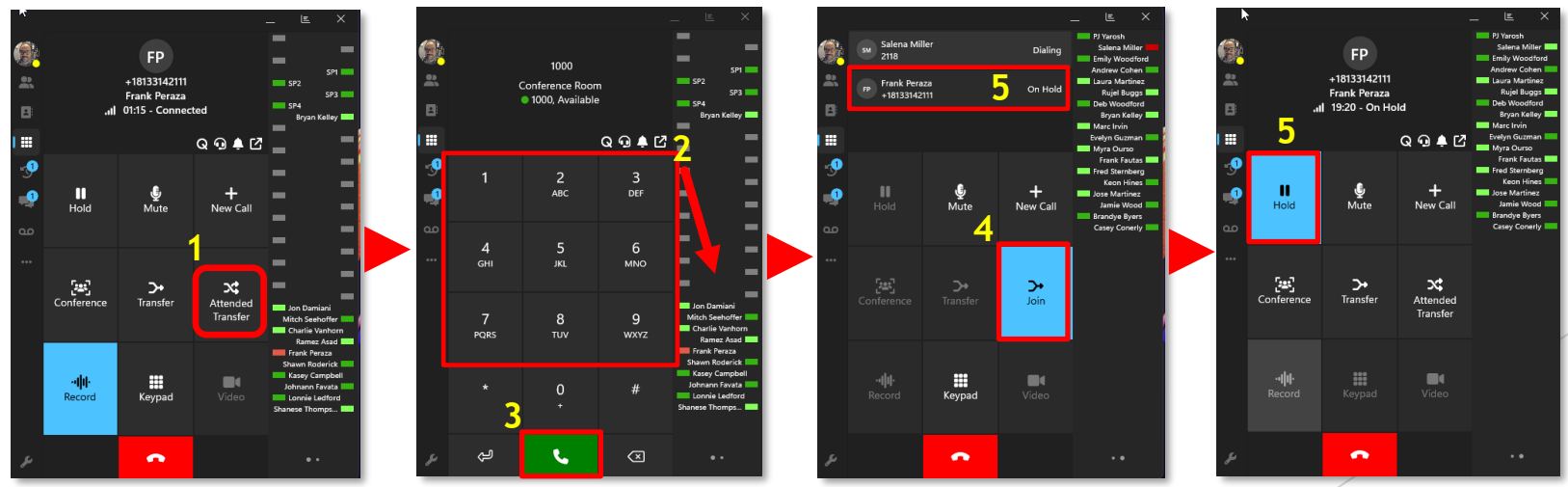


1. To perform a blind transfer, press the **“Transfer”** button.
2. Dial the extension number of the recipient or press their BLF button if programmed.
3. Press **“Call”** button to complete the transfer.

****TIP****

To perform a direct voicemail transfer, follow the same steps as Blind Transfer but add ***4** before dialing the extension

ATTENDED TRANSFER

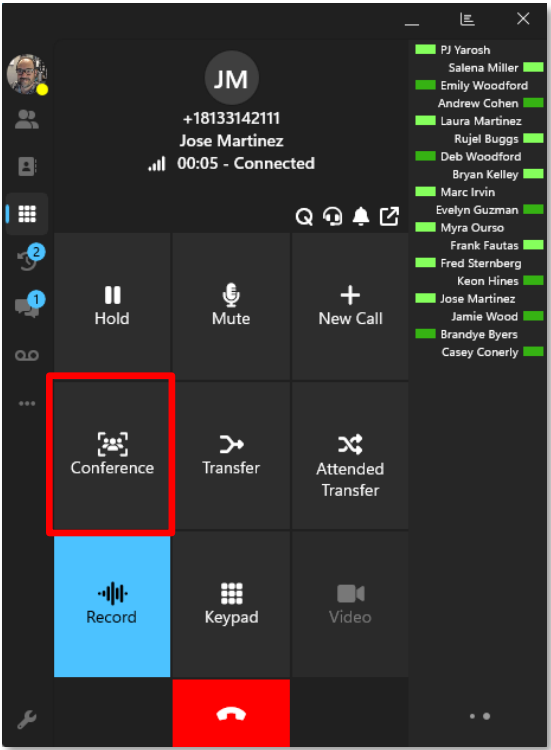


1. To perform a Attended Transfer, press the **“Att Transfer”** button.
2. Dial the extension number of the recipient or press a BLF.
3. Press the green **“Call”** button
4. If the User accepts the call, press the **“Join”** button and hang up.
5. If the user rejects the call, you can go back by pressing the call **“On Hold”** or press the **“Hold”** button

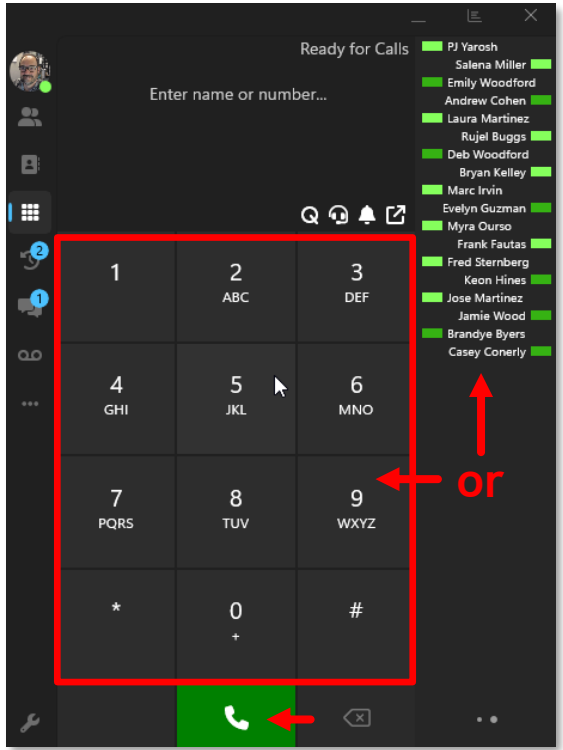


Conference Call

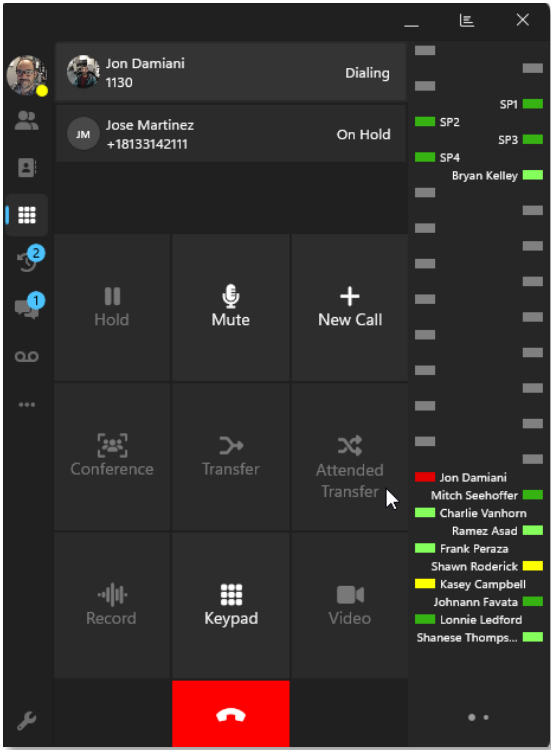
1



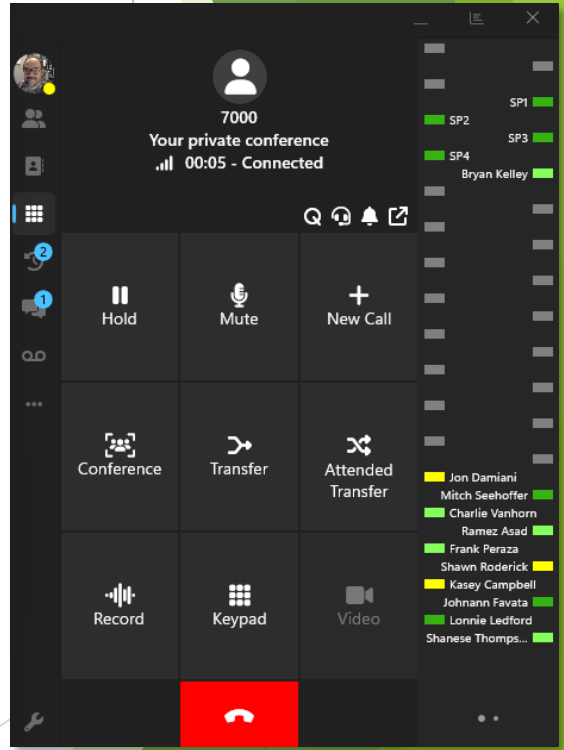
2



3



4

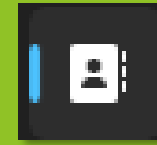


While on a call, press the conference button. This will automatically place your current call on hold.

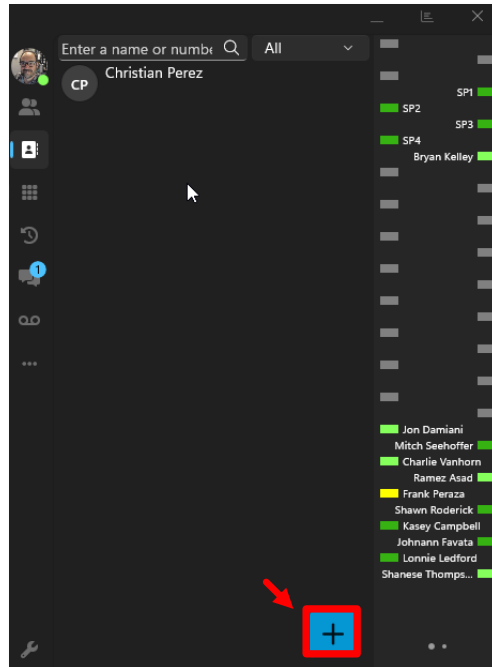
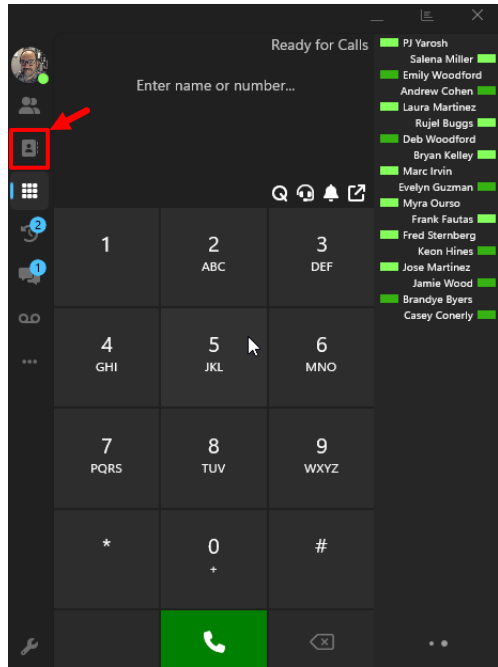
Dial the number for the second party and press the call button.

Wait for party to answer.
NOTE: If party does not answer, you can cancel the conference by hanging up.

Conference call is completed. To add a 4th caller, repeat steps 1 - 3.



Contacts

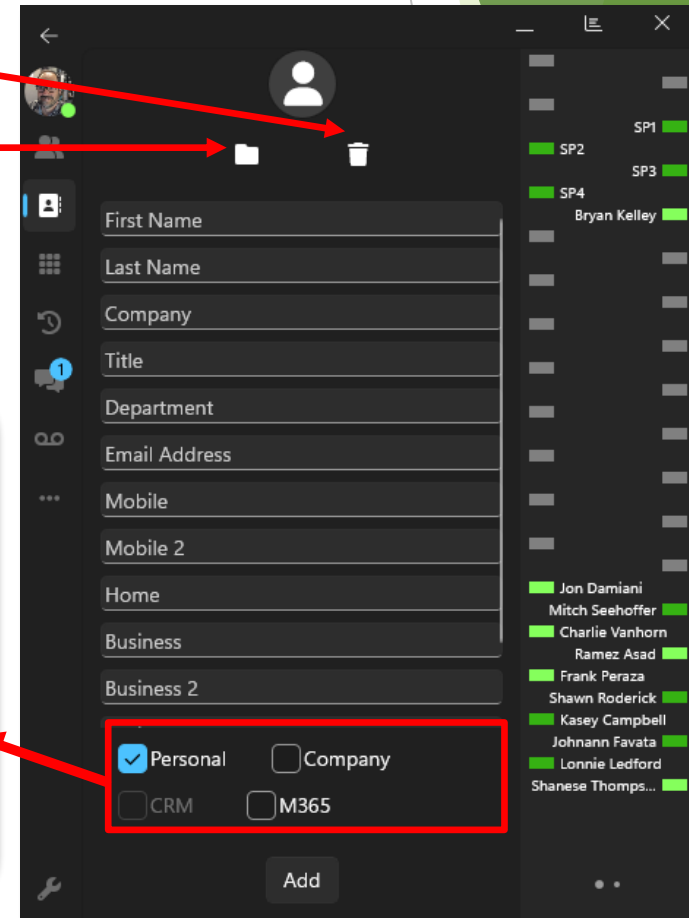


Choose from:

- Personal - Will only display for your extension
- Company - Will display for all users on the system
- M365 - Will add contact to Microsoft 365. *Note: requires 3CX integration*
- CRM - Will add contact to your CRM platform. *Note: requires 3CX integration*

Delete contact image

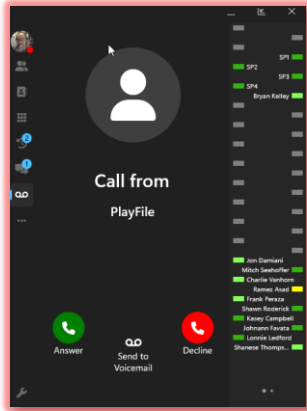
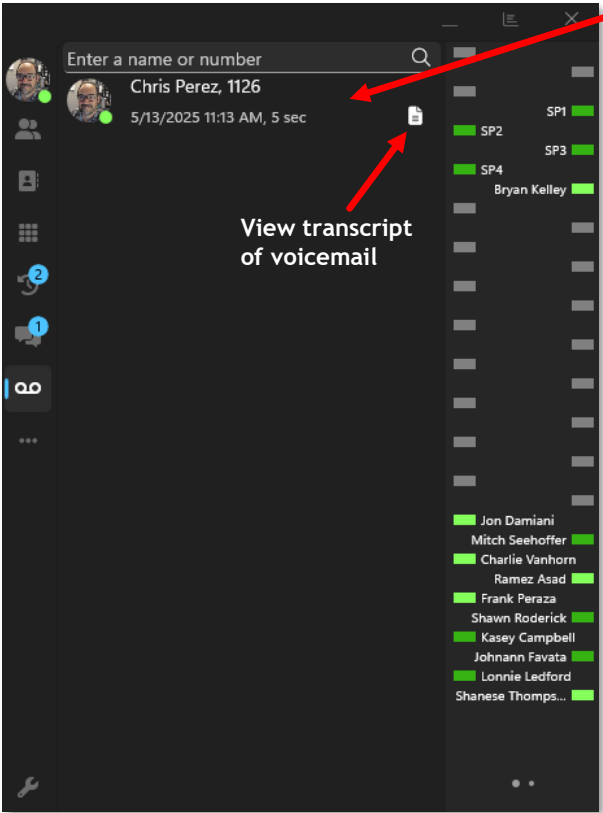
Add contact image



Access to Voicemail



Clicking on the voicemail message will automatically initiate a call from the voicemail system to your extension.



- Press * to play messages
- Press 1 to change profile status
- Press 4 to delete all read messages
- Press 5 to record name for the mailbox
- Press 6 to play mailbox information
- Press 7 to change mailbox pin
- Press 8 to record your greeting
- Press 9 to replay menu prompts
- Press # to exit voicemail

Play Sub-Menu

- "0" Plays next message
- "1" Plays previous message
- "2" Repeats message
- "3" Deletes message
- "4" Calls back the number
- "5" Forwards the message
- "9" Back to voicemail options
- "#" Exit Voicemail

Right click over the voicemail to select additional options.

