

3CX Team

Search people or enter number ...

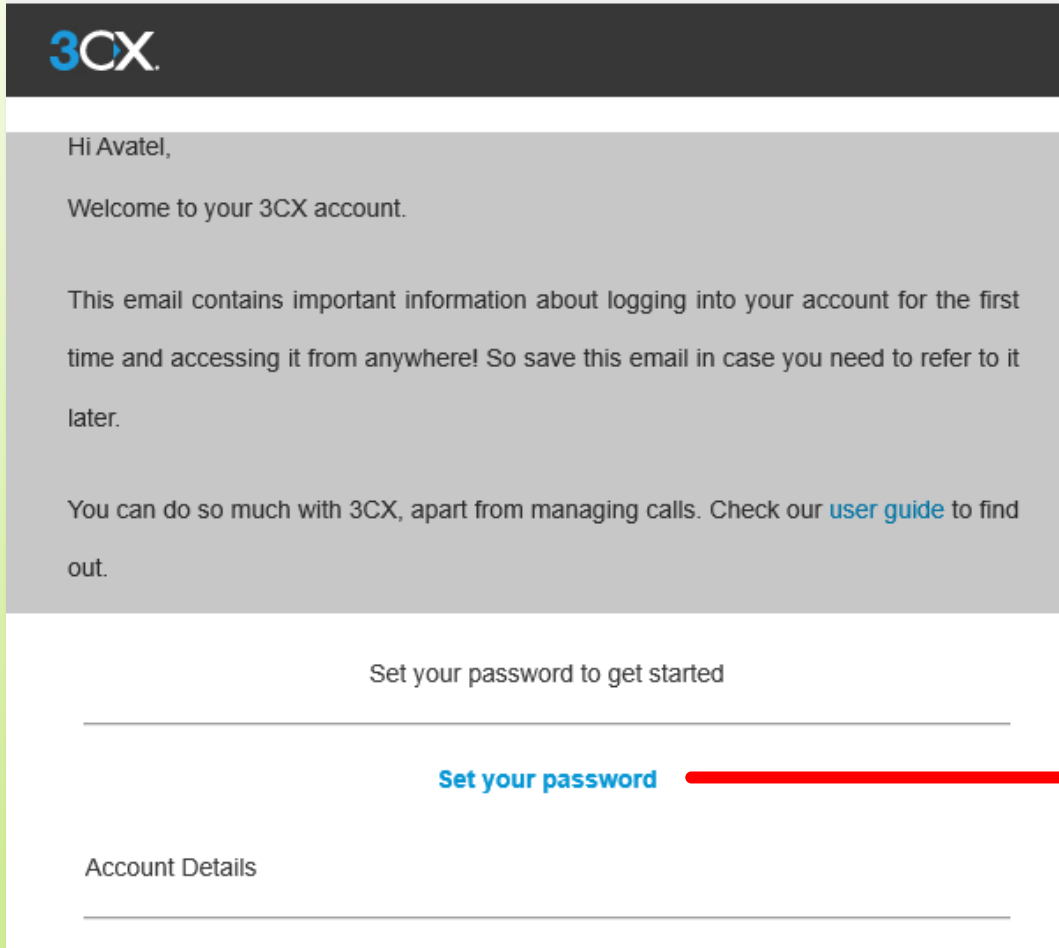
BM	Bresse, Michael 1144 Available	BR	Buggs, Rujel 1113 Available	CK	Campbell, Kasey Available
CE	Cordless, Engineering 0002 Available		Damiani, Jon 1130 Available	FJ	Favata, Johann Do Not Disturb
ML	Martinez, Laura 1116 Available	MS	Miller, Salena 2118 Available	PF	Peraza, Frank 1 Available
PO	Phone, On Call 2133 Available	SM	Seehoffer, Mitch 1140 Available	TS	Thompson, Sha Available

Enter name or number...
Call using: Browser

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

SP1
SP2
Damiani, Jon
Seehoffer, Mitch
Vanhorn, Charlie
Asad, Ramez
Peraza, Frank
Campbell, Kasey
Cohen, Andrew
Ledford, Lonnie
Favata, Johann
Thompson, Shanese
Yarosh, PJ
Miller, Salena
Woodford, Emily
Byers, Brandye

3CX WebClient



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.

Shortcut to create new chat, call, contact or Meet

Show/Hide personal contacts

QR code to register mobile app

Help Guide

Access to phone panel

Team view (current view in image)

Chat/Messaging view

Meet view for audio/video conferencing

Call Log view

Panel view for calls in Queue

Contacts view for system/personal contacts

Access to voicemail, recordings & personal settings

Set user status, Log in/out of queues, *Manual override of office hours.
** Requires manager privileges*

BM	Bresse, Michael 1144	BR	Buggs, Rujel 1113	CK	Campbell, Kasey 1138	CA	Cohen, Andrew 4606
CE	Cordless, Engineering 0002		Damiani, Jon 1130	F	Favata, Johann 1023	GE	Guzman, Evelyn 1114
ML	Martinez, Laura 1116	MS	Miller, Salena 2118	PF	Peraza, Frank 1019		Perez, Chris 1126
PO	Phone, On Call 2133	SM	Seehoffer, Mitch 1140	TS	Thompson, Shanese 4645	VC	Vanhorn, Charlie 1122
WD	Woodford, Deb 1135						

CA Cohen, Andrew 4606
Away

User's current status

Call user

Video call user

Chat with user

Add to favorites

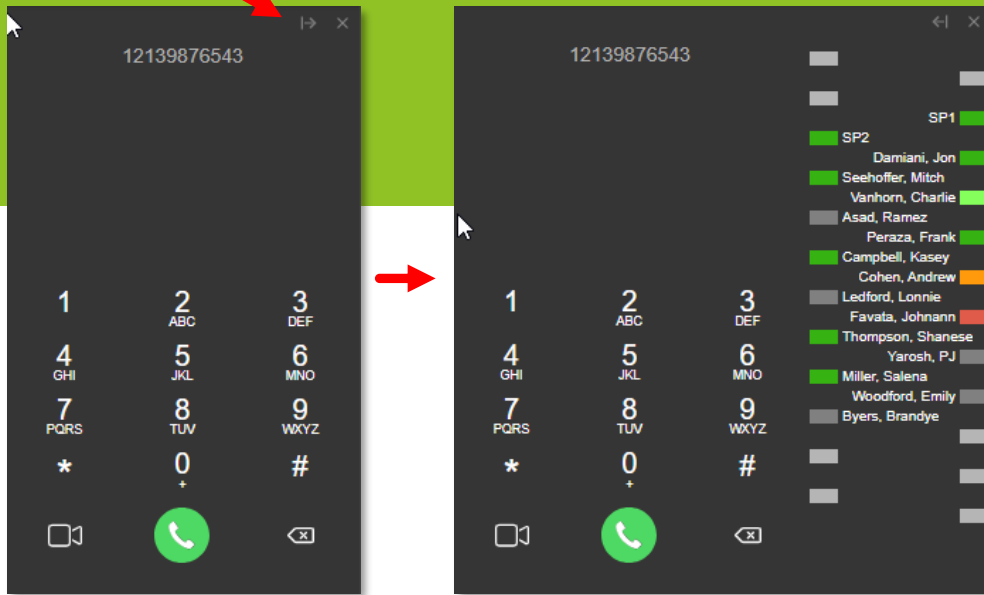
This selection list will vary depending on assigned user privileges.

- Intercom
- Email
- Leave Voicemail
- Video conference
- Set status
- Set reminder
- Delete reminder
- Assign
- Clear
- Monitor Connection Quality

Install and provision various applications including click to dial.

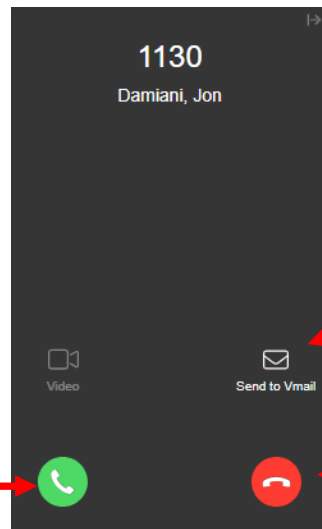
- Available
- Away
- Do Not Disturb
- Remote
- Out of Office
- Set status temporarily
- Override office hours
- Monitor Connection Quality
- Logout from Queue
- Ringer Off
- Settings
- Logout

Use the expand button to show the programmed buttons of your phone.



Phone Calls

Incoming Call



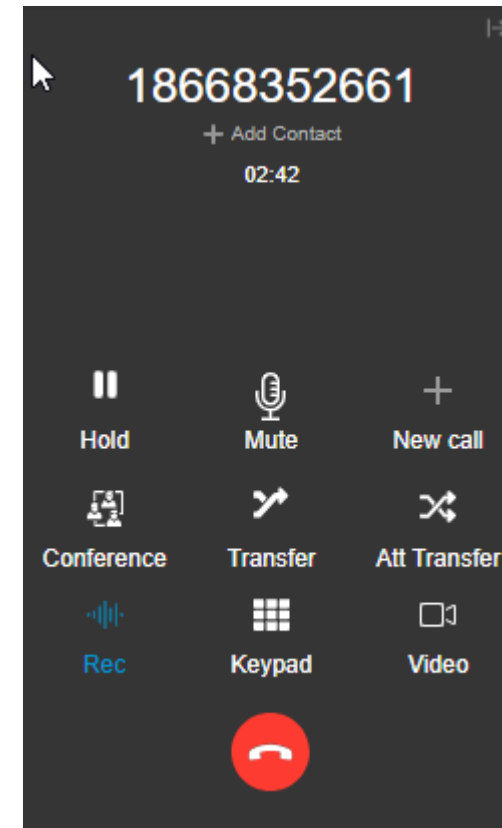
Answer call



Hang Up

Send to voicemail

Send to Vmail

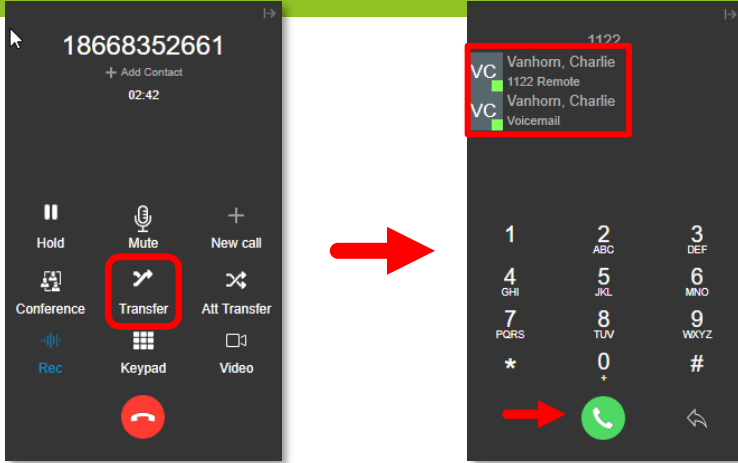


All call functions will be displayed during your call.



Transfer Calls

BLIND TRANSFER



To perform a blind transfer, press the **“Transfer”** button.

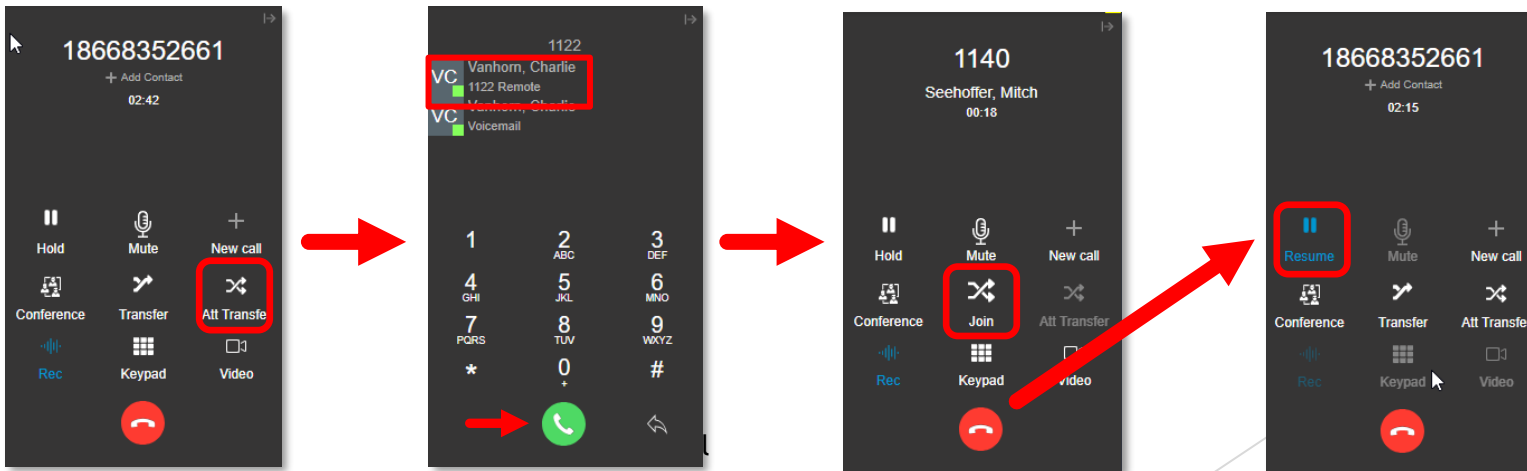
Dial the extension number of the recipient or press their BLF button if programmed.

Press the round **“Call”** button to complete OR press the **“User”** or the user’s **“Voicemail”** to transfer call directly to their voicemail box.

****MANUAL TRANSFER TO VM****

- Follow the same steps as Blind Transfer but add ***4** before the extension

ATTENDED TRANSFER



To perform a Attended Transfer, press the **“Att Transfer”** button.

Dial the extension number of the recipient.

Press the green **“Call”** button OR press the **“User”** at the top.

If the User accepts the call, press the **“Join”** button. If the user rejects the call, you can go back by pressing the red **“Hang Up”** button then press the **“Resume”** button to go back to the call.

Scheduled Conferences



Meet

The screenshot shows the Meet application interface. On the left, a 'New conference' dialog box is open, allowing users to configure a meeting. The dialog includes options for 'Type' (Audio, Video, Webinar), 'When' (Now, Later), a 'Subject' field, and a 'Notes to participants' section. Below these are options to 'Select email / calendar to add to' (M365) and 'Create meeting' or 'Cancel' buttons. The main interface displays 'Joining as 3CX Admin' with the instruction 'Press "Start Now" to enter the meeting'. It features a 'Self Test' button and a prominent 'Start Now' button. At the bottom, a toolbar contains icons for inviting participants, adjusting audio/video settings, and displaying a QR code. A red circle highlights the '3A' ID in the notes section.

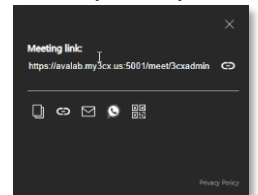
New Conference allows you to setup the type of conference you need and create calendar invites to all participants via email.

Scheduled Conferences displays all your scheduled conferences with the ability to join them.

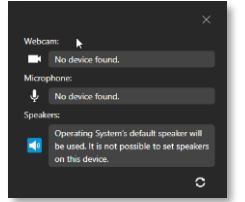
Use the **Self Test** to adjust your settings before starting a conference.

Start Now to immediately begin a new conference.

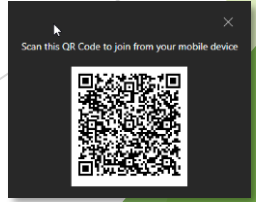
Invite participants



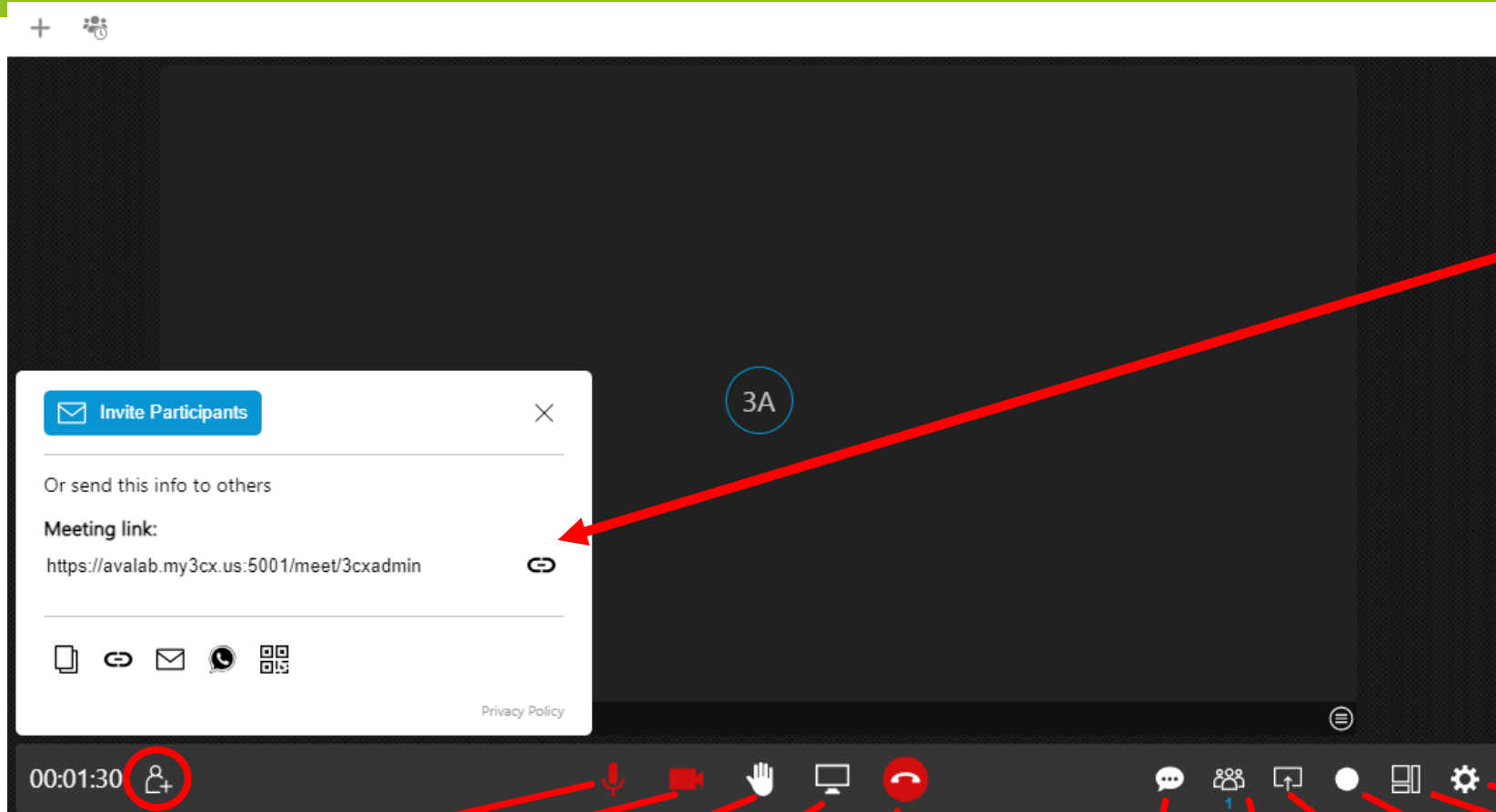
Audio/Video settings



QR code to use your mobile device for the conference



Meet: Start Now



Add Participants allows you to email an invite with your email application. Clicking the Invite Participants will immediately open your default email application on your PC.

- Mute/Unmute
- Camera on/off
- Raise your hand
- Screen sharing
- End meeting
- Chat
- Participants
- Share Content
- Record Options
- Layout
- Options

Basic Settings



3CX Settings

- Team
- Chat
- Meet
- 1 Calls
- Panel
- Contacts
- ...

- General
- Call Forwarding
- 3CX Talk
- Chat
- Audio/Video
- View
- Greetings
- Integration
- BLF

- ← Enter your mobile number, set your voicemail pin
- ← Set forwarding for different user status including custom status message.
- ← Set your link name for your own personal talk & meet URL links.
- ← Customize audible notification when receiving chats.
- ← Set your headset and camera for the webclient including where you want the phone to ring.
- ← Customize your Team view. Show unregistered extensions.
- ← Customize your personal voicemail greetings for different status settings.
- ← Settings for CRM integration.
- ← Customize your button programming.

Available	Available
Away	Custom Status Message
Do Not Disturb	
Remote	Unanswered Calls
Out of Office	No Answer Timeout <input type="text" value="20"/> in seconds
Exceptions	Forward external calls to Voicemail
Schedule	Forward internal calls to Voicemail
	Busy or not Registered
	Forward external calls to Voicemail
	Forward internal calls to Voicemail
	General options
	<input type="checkbox"/> Also ring my mobile

Greetings

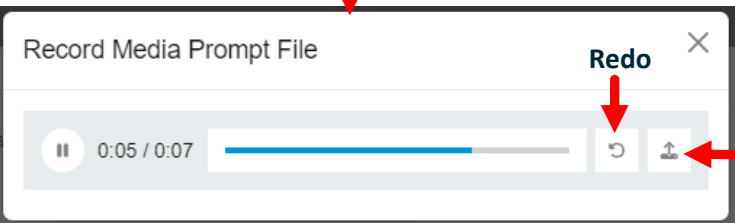
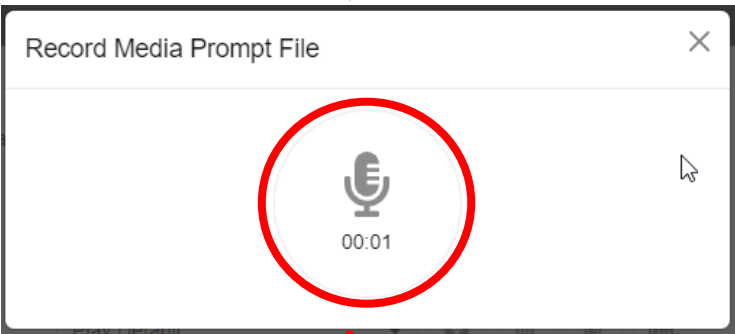
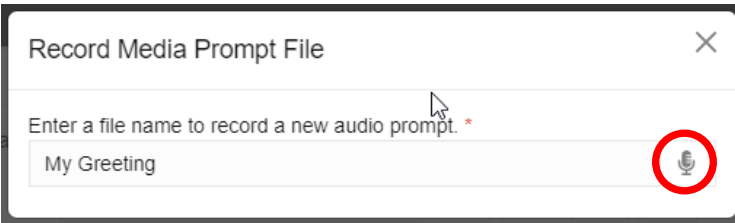
Select or upload a customized greeting for each profile status

Default	Play Default	+	🗑️	🎧	📁
Available	Play Default	+	🗑️	🎧	📁
Away	Play Default	+	🗑️	🎧	📁
Do Not Disturb	Play Default	+	🗑️	🎧	📁
Remote	Play Default	+	🗑️	🎧	📁
Out of Office	Play Default	+	🗑️	🎧	📁

Settings: Greetings



Record using your headset. Give your new recording a name, then press the mic icon to record. Click on the upload icon before closing the window.



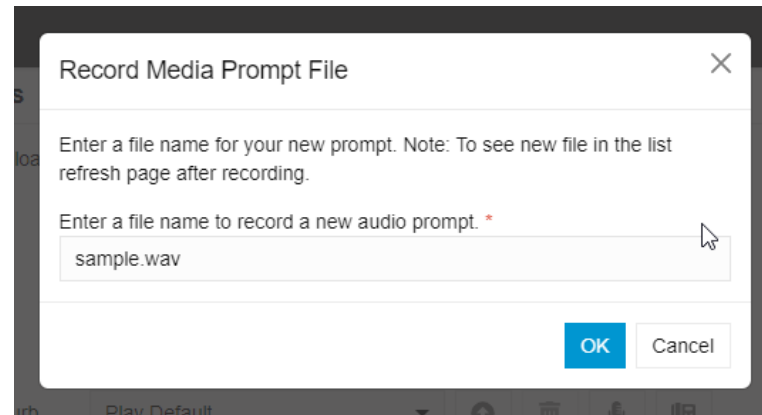
Upload

Greetings

Select or upload a customized greeting for each profile status

Default	Play Default	↑	🗑️	🎤	📁
Available	Play Default	↑	🗑️	🎤	📁
Away	Play Default	↑	🗑️	🎤	📁
Do Not Disturb	Play Default	↑	🗑️	🎤	📁
Remote	Play Default	↑	🗑️	🎤	📁
Out of Office	Play Default	↑	🗑️	🎤	📁

Upload your own .wav file.



Record your greeting using your Desk Phone. Enter a name for the greeting and click OK. The voicemail system will ring your desk phone. Answer the call and follow the prompts.

Press 0 to Save

Press 1 to Record over

Press 2 to Play your greeting

When the greeting is saved, hang up. Refresh your screen by pressing F5. You should see your new recording in the drop down list.

Contacts



To add a new contact click on the "+" button.

A screenshot of the 3CX webclient interface. The top bar shows "3CX Contacts". Below it is a toolbar with a "+" button (highlighted with a red box), an upload icon, a trash icon, and a search field. A list of contacts is shown below, including "6S 600 Speed Dial" and "Company 2". A vertical sidebar on the left contains icons for Team, Chat, Meet, Calls, Panel, Contacts (highlighted with a red box), Voicemail, Recording, and Settings.

A screenshot of the contact form in the 3CX webclient. The form has fields for First Name, Last Name, Company, Title, Department, Email, Mobile, Mobile 2, and Home. On the right side, there are fields for Business, Business 2, and Business Fax, and a section for "Add Contact to" with radio buttons for CRM, M365, Company (selected), and Personal. A "Save" button is in the top right corner (highlighted with a red box). A red arrow points to the "Select Image" icon (a person silhouette) on the left side of the form.

By default, new contacts will be added to the 3CX Phone Book directory. The contact will be available to all webclient, softphone and IP Phone users on the system. Note: Ip phone users will have to hit "3CX Pbook-->Options->Update" to update its directory.

Access to Voicemail



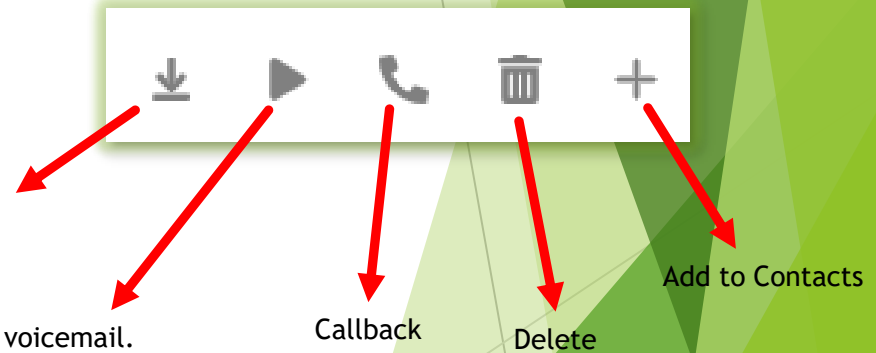
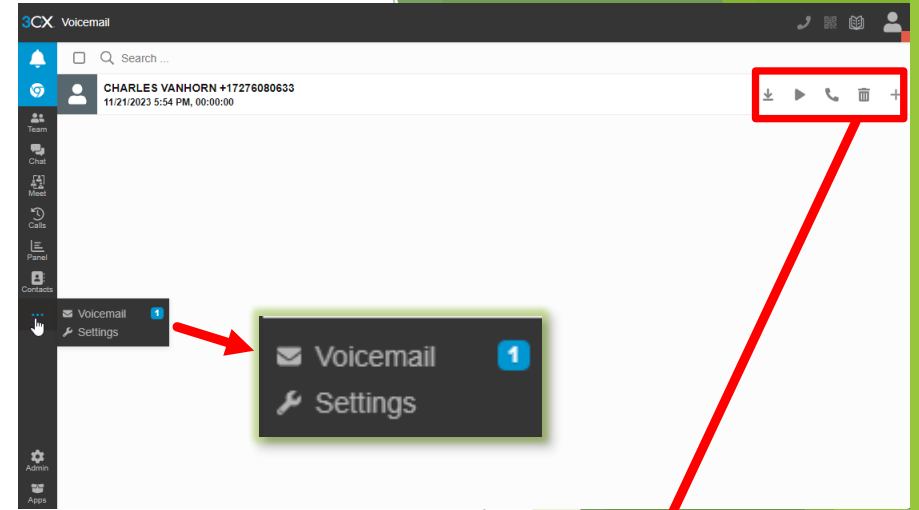
Dial VM Access code. (see instructions below)

- 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

OR



Download voicemail

Play voicemail.
The voicemail system will call your extension. Answering the call will play your voicemail message.

Callback

Delete

Add to Contacts

Voicemail Access Code: Dial the appropriate code that matches your system extension setup.

2 digit ext. "99" 3 digit ext. "999" 4 digit ext. "9999"