

# Quick Start Guides

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# 3CX Quick Start Guide

## Using your 3CX Desk Phone

### To make a call:

1. Dial the number on the keypad and hit the send button.
2. OR select a contact or extension from your Web Client or a number from a web page, hit call.
3. The Web Client triggers the call on your desk phone if selected via the phone selector toggle.

### To transfer a call:

1. For blind transfer: Press “Transfer”, dial the extension, press send/dial and hang up.
2. Attended transfer Yealink: Press “Transfer”, dial number or select extension, press “Send”, announce the caller, press “Transfer” and hang up.

### Connect to Voicemail of extension:

1. To leave a message in the voicemail box of a particular Extension: Press “Transfer” , then Dial \*4. For example, press ‘Transfer’, then \*4100, will leave a voicemail message in the voicemail box of extension 100.

### Using Shared Parking:

1. By default, there are 2 Shared Parks set up on your system, SP 1 and SP 2. There is a limit of 1 person per Shared Park. If additional Shared Parks are needed, contact your system administrator for setup.
2. To use a Shared Park, while on an existing call, simply press an available (GREEN) Shared Park (SP #) button on your phone. The calling party will be placed on HOLD listening to music awaiting pickup.
3. To pick up a Shared Park, simply press the occupied SP button (RED) with your calling party on hold from any telephone in the office.

**Please NOTE:** To answer a Shared Park using your mobile app / web client, simply dial ext001 for SP 1 and ext002 for SP 2. For example, if the receptionist places an inbound call on SP 1 and a mobile app user wishes to pick up, they simply dial 001 or 002 respectively based on which park it is placed in.

### Using Do Not Disturb (DND):

- The Do Not Disturb feature allows you to reject all incoming calls. This can be useful when trying to focus on that big project or if you are away from your desk. All calls will automatically be redirected to your extension voicemail.

## Using History:

- Your phone provides a record of all incoming / outgoing calls made. By clicking the History button you will have access to the following categories – All Calls / Missed Calls / Placed Calls / Received Calls / Forwarded Calls.

## Using 3CX Phonebook / Contact Directory:

3CX has a rich contact directory called 3CX Phonebook. Using 3CX Phonebook, you can add, manage, and access contact information from whatever platform you're using, desktop or mobile. You can add company-wide contacts or personal contacts.

Here's how you add a contact to 3CX Phonebook:

1. Login to your 3CX Web Client
2. Click Contacts on the left menu bar
3. Choose Company or Personal Phonebook
4. Click the plus-sign (+)
5. Enter Contact information
6. Click the SAVE button (looks like a floppy disk)

## Force 3CX IN or OUT of Office - Emergency Code

### Setting 3CX to In Office Hours

If the Administrator dials \*641 (appends a 1 to the code), a prompt will be played stating that **“3CX is now set to IN OFFICE HOURS”**. This means that the PBX will disregard the current time, or day (even if it is a holiday) and set all the routes of the Gateways, VoIP Providers and DID/DDI's to route to the In Office hours destination.

### Setting 3CX to Out of Office Hours

If the Administrator dials \*642 (appends a 2 to the code), a prompt will be played stating that **“3CX is now set to OUT OF OFFICE HOURS”**. This means that the PBX will disregard the current time, or day (even if it is 10am for example) and set all the routes of PSTN Gateways, VoIP Providers and DID/DDI's to route to the Out of Office hours destination.

For more information, visit [Manually Enable / Disable Night Mode!](#)

## Voicemail

## Setting your Voicemail Greeting:

1. By phone:
  - Dial “999” or simply press the “MESSAGE” button on your phone
  - Enter your PIN and then press “#”.
  - Select option “8” and then “0” to record.
  - Press “#” to end recording and “0” to save.
2. From the web client:
  - Go to “Settings” > “Greetings”
  - From here you can set a greeting according to your status.

## To Playback Voicemail:

1. By Phone:
  - Dial “999” or hit “Voicemail/Message”
  - Enter your PIN, press “#” (if required) and then “\*” to play your messages.
  - During playback of voicemail, you have these options:
    - 0 -Skip to the next message.
    - 1 -Skip to the previous message.
    - 2 -Repeat current message.
    - 3 -Delete the current message and automatically go to the next message.
    - 4 -Call Back -this will trigger a call to the caller ID of the person who left the message.
    - 5 -Forward message to another extension.
    - 9 -To go to the Voice mail options menu.
    - # -To hang up the call.
2. Web Client: Click on “Voicemail” and click the playback icon to listen to the message on your selected phone.
3. Android & iOS App: Tap on the burger menu and select “Voicemail”, tap on the voicemail and select “Play” to listen to the message.

## Voicemail Message Prompts:

1. To play available voicemails press “\*”
2. To change profile status press “1”
  - Press 1 for Available
  - Press 2 for Away
  - Press 3 for Out of Office
  - Press 4 for Custom Profile 1
  - Press 5 for Custom Profile 2
3. To dial a number press “3”
4. To delete all read messages press “4”
5. To change your self-identification message “5”
  - To record new self-identification message press “0”
  - To delete message press “1”
  - Check current self-identification message press “2”

- To exit, press “#”
6. To play mailbox information press “6”
  7. To change voicemail pin number press “7”
  8. To change your greeting message press “8”
  9. To repeat the prompt press “9”

## Your Communications Dashboard - The 3CX Web Client

### Login to the Web Client

- Open the “Your User Account on your New 3CX System” email.
- Click the Web Client URL.
- Login with Google, MS 365, or use the credentials in the email.

### Manage your status & queues

- Set your status by clicking on your Avatar: 5 options available.
- Your status changes to yellow when your line is busy.
- Customize status / forwarding rules: “Avatar > Your Name > Status”.

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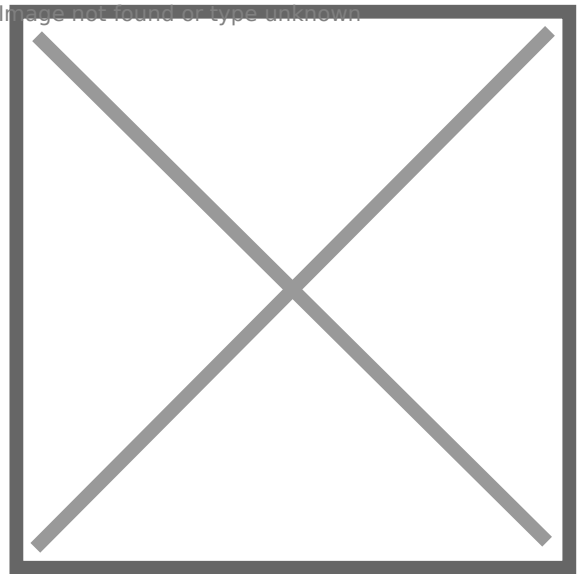
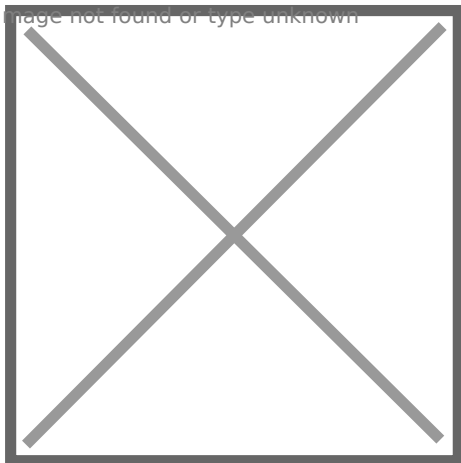


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1. To call, click on the dial pad in the top right menu or click on the search icon.
2. Enter the phone number or search by name, extension number or email address.
3. Choose your device to place a call – You can seamlessly place calls from your IP phone, the iOS or Android app, Web Client or the Desktop App – wherever you have provisioned your extension. From the phone selector in the web client’s dialer, you can select your preferred device and control calls from the Web Client interface.
4. Click the handset icon to start the call.

The “Status” feature allows you to see which colleagues are available to take calls. Avoid distractions and set your own status to let others know when you’re away or you don’t want to be disturbed.

**Manage your status:**

- Click your avatar in the top left and choose from **Available, Away, Do Not Disturb, Lunch, Business Trip**.
- Your status changes to yellow when your line is busy.
- Click on your avatar to select **“Set status temporarily”** to time-limit your status.
- From this menu you can also login and out of queues.
- Use the pencil icon to set a custom status message

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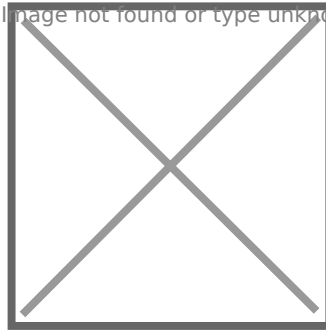
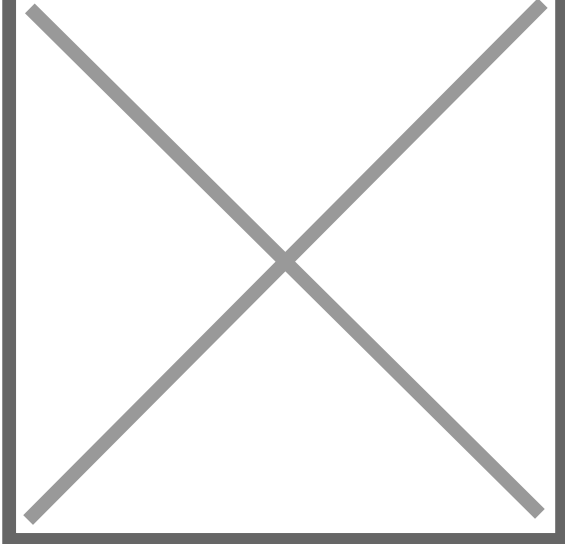


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**Chat with colleagues and customers:**

In the **“Web Client > Chat”** section, you can send and receive instant messages with colleagues as well as live chat, WhatsApp, Facebook, and SMS/MMS messages from customers.

Quick response chat templates are available to be created and edited by group managers. These allow users to respond with predefined messages making response times quicker. Templates can be split into different categories and languages.

Find out more about composing chats and SMS, and the various chat functions available in the [business chat manual](#).

## Your Office Anywhere - The 3CX Apps

### Download the iOS or Android Apps:

1. Open your welcome email.
  2. Open the app on your device, tap on the menu (top left) and then "Scan QR Code"
  3. Now scan the QR code from your welcome email
- DONE!**

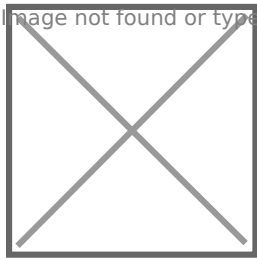
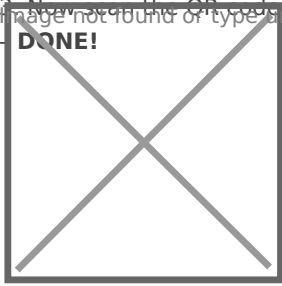
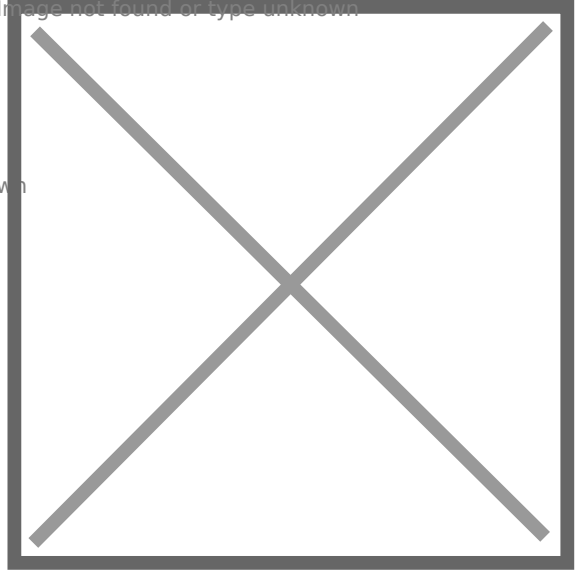


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# Web Client User Guide

## Your One Stop for All Communications - The 3CX Web Client

The 3CX Web Client is easy to use and combines all the features you need to efficiently communicate, collaborate and connect with colleagues, partners and customers, straight from your browser.

## The Web Client at a Glance

From this one interface, you can easily make calls, view the status of colleagues, send chat messages, and hold a video conference. Here's a quick look at the great things you can do with the 3CX Web Client.

<https://www.youtube.com/embed/8MBRmWTLZI8?feature=oembed>

## Let's get started: Logging on

In your Welcome Email you'll find your credentials and a link to the web client. If you've lost your Welcome Email, not to worry. You can have it resent via the smartphone app (iOS, Android), or from the desktop client.

## The 3CX Web Client Google Extension

Once you're in the Web Client, you'll see **"Install 3CX Google Extension"** in the top left. The Google Extension gives you immediate access to calls with a mini, pop-out web client so that there's no need to keep the full Web Client open in your browser, allowing you to work more efficiently across all apps. The Web Client Google Extension is fully integrated and works with your CRM, opening customer records and showing you caller IDs. What's more, the extension offers Click to Call functionality by automatically detecting phone numbers on web pages and in CRMs.



# Placing a call

No need to dial any extension numbers here. Quickly and easily find who you need to call by searching with name, number or email address. Click the phone icon and voilà, you've just made your first call.

Once you're in a call, you can seamlessly perform a number of actions with just a few mouse clicks.

1. **"Transfer"** will transfer the call without the need for you to speak to the receiver, a **"Blind Transfer"**.
2. **"Att.transfer"** will transfer the call after you first speak to the receiver to see if they accept the call, an **"Attended Transfer"**
3. **"Conference"** allows you to create an ad hoc conference call, adding more participants to join the conversation.
4. **"Rec"** allows you to record your conversation.

# Customized Experience: IP Phone, Smartphone or Web Client

The Web Client can be used for more than browser-based communications. Using the **"Phone Selector"**, you can easily select your preferred device and seamlessly control calls using the Web Client interface.

1. Click on the phone selector and choose your device, e.g. your smartphone.
2. Place your call as normal – a call notification will appear from **"Make Call"**.
3. Click **"Answer"** to call the contact.

Additionally, you can personalize your Web Client and Chrome Extension audio and video options to assign the **"Speaker"** and **"Ringer"** outputs to the devices you choose. This allows you to hear your extension ringing through speakers, but listen to call audio through a headset. You can configure these audio options in **"Settings" > "Personalize" > "Audio/Video"**.

# Manage your Status

Make the most of the Status feature to save time and increase efficiency by seeing which colleagues are available to take calls. Avoid distractions and set your own status to let others know when you're away or you don't want to be disturbed.

Choose from **Available**, **Away**, **Do Not Disturb**, **Lunch**, **Business Trip**, and **Set Status Temporarily**.

Further, customize your status in **"Settings > Call Forwarding"**. Here you can:

- Set a custom message
- Enable/disable PUSH messages for each status
- Rename **"Lunch"** and **"Business Trip"** profiles
- Set the number of seconds to activate forwarding of unanswered calls for **"Available"** and **"Lunch"** profiles
- Override forwarding rules based on Caller ID and time of the call

# Professional Call Management with the 3CX Switchboard

For job roles where advanced call management is a daily task, the 3CX Switchboard is a powerful and user-friendly tool that offers a concise yet comprehensive view on call and queue activity.

<https://www.youtube.com/embed/eJrKxeaRaBQ?feature=oembed>

There are various Switchboard views to choose from depending on your job role, which allows for quick and efficient call answering and transfers, monitoring, queue statistics and more. Choose from:

- **"All"** – extension and queue calls
- **"Queue Calls"** – Queue call activity
- **"Wallboard"** – Call queue analytics
- **"Per Queue"** – calls and agents for each queue

- **“Reminders”** – View and manage all set **“Reminders”**


To perform an action on a call simply right click on it to open the actions menu. You can even customize your view by clicking the pop-out icon to display them in a separate browser window. To set custom messages in the Wallboard, head over to **“Settings > Personalize > Wallboard”**.

# 3CX Chat User Guide



## Manage Customer Queries from Live Chat, WhatsApp, Facebook and SMS/MMS

The 3CX chat feature doesn't only allow employees to chat and share files with each other, it also enables customer service agents to easily respond to queries sent via live chat, WhatsApp, Facebook and SMS/MMS. All from the same user-friendly interface.

## Receiving chat messages

Incoming chat messages will be routed to specific queues or extensions. The type of chat conversation is highlighted by a specific icon; Website live chat , WhatsApp



, Facebook , and SMS/MMS . Internal chat messages are not specified by any icon.



If an unknown contact sends a chat you will be prompted to **“Add contact”**, **“Reply”** or **“Ignore”**.

Chats are visible to all agents who are in the assigned queue. The administrator can configure the polling strategy of the queue (e.g. the first agent to answer a chat, the top 3 agents, etc).


Any agent can respond and see ongoing conversations until one agent takes ownership. As soon as an agent responds to an incoming chat, the chat automatically becomes theirs and no other agent can respond or see the conversation. Alternatively, do this:

- Click on the chat conversation, then click on the **“Take”** take icon in the top right corner. You are now the owner of this conversation; other agents no longer have access to it.

# Use quick response message templates

Respond to any chat message including live chat, WhatsApp, Facebook & SMS faster with message templates.



1. Click on the templates icon , in the bottom left corner of the chat panel to expand the templates. Only Managers, Group Owners and System Owners have the rights to manage chat templates.
2. Use the search bar, categories tabs or language drop-down option to filter the templates.
3. Click on a template and the text will automatically populate in your reply panel for you to edit or send.

# Transferring a chat

You may decide that the issue needs handing off to another agent.


1. While in a chat, click the **“Transfer”** transfer button in the top right.
2. Search the agent you want to transfer the chat to by name or extension number.
3. Click on the extension and the chat will be transferred. You are no longer able to view the conversation.

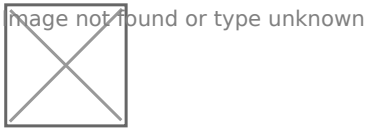
# Additional actions

There are various chat actions available to help you efficiently manage your conversations and gather additional details about customers.

# View user information

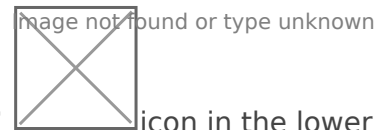
Depending on the type of chat, you can view additional information.

1. Click on the menu icon  button in the top right corner.
2. Select **“Information”**.



3. From here you can:
  1. Email or add a live chat user as a contact.
  2. Call or add a WhatsApp user as a contact.
  3. Call, send SMS or add an SMS contact.
  4. View the Interaction history of this user with all agents and departments.


## Send images and files



Send files by drag and drop or by clicking on the **“Attach document”** icon in the lower right corner. The following files are supported:

- Documents: Acrobat (PDF), MS Office (DOC, DOCX, PPT, PPTX, XLS, XLSX), plain and rich text (TXT, RTF).
- Images: JPG, PNG, GIF, BMP, WEBP, TIFF, and HEIF.

## Mark a chat as ‘Dealt with’

Once a chat conversation (excluding internal) has come to an end, click on the **“Dealt with”**  button to close and archive the chat session.

If the chat is not marked as **“Dealt with”** and it has been **“Taken”** by an agent the next time the same customer sends a message, the new message will be delivered to the **“Taken”** agent’s inbox rather than following the configured routing to a group or queue.

## Block a user or end the chat session

Only available for website live chat, these functions will block a website user from contacting you via chat or close the chat session and notify the customer that the chat has ended.

1. Click on the menu **menu icon** and **button** in the top right of the main chat window.
2. Select **“End chat session”**. The user will be notified that the chat has ended.
3. Select **“Block anonymous user”**. The user’s IP will be blocked and they will no longer be able to access website live chat.

## Resolve/Archive a chat

Archiving a chat removes the conversation from the main or **“Recents”** view.



From the chat window, click the menu **menu icon** and select **“Archive”**. The conversation will be removed from the main chat window. Access archived chats from the drop-down menu in the top right corner.

When in the archived chats list, click the menu **menu icon** next to each chat to:

- Transfer the chat
- Unarchive
- Delete

## Chat settings

Go to **“Settings”** > **“Chat”** to configure:

- Show chat toaster - select to show chat toaster and/or web notifications
- Play chat notification - enable and select a personalized notification sound.

Note: Custom chat notifications are available only for the 3CX Web Client/ Desktop app and the 3CX iOS app.