

# 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.

<https://www.youtube.com/embed/qug-SY2xUXs?feature=oembed>

# 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”**.

---

Revision #1

Created 11 December 2023 20:20:39 by Vox Tandem Admin

Updated 11 December 2023 20:26:07 by Vox Tandem Admin