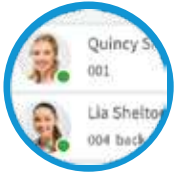


## 01 Your Communications Dashboard - The 3CX Web Client



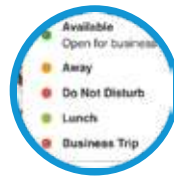
### Logging in

- 1 Retrieve your credentials from your Welcome Email.
- 2 Go to your Web Client URL, e.g. <https://mycompany.3cx.com/webclient/>
- 3 Log in using your extension and password.



### Make, Receive & Transfer Calls

- 1 Make a call by clicking on an extension or enter name/number in the search box.
- 2 Toggle the phone icon to trigger a call on your smartphone, deskphone or web client.
- 3 Transfer a call by clicking “Transfer” or “Att. Transfer”, enter the extension or name.
  - a. If Att. Transfer announce the call and click “Transfer”.
  - b. To blind transfer click “Transfer” and hang up.



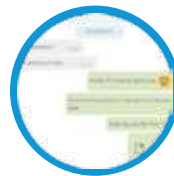
### Manage your Status

- 1 Set your status and status message by clicking on the drop down menu next to your avatar.
- 2 Click on the pencil to add a status message.
- 3 Set status temporarily to time limit your status automatically.
- 4 Green means available, yellow on a call, red is busy - calls will be diverted to voicemail.



### Call numbers from web pages The Click2Call Extension

- 1 Install the Chrome or Firefox extension.
- 2 Configure it and refresh your browser.
- 3 Clicking on a number will launch the 3CX dialer.



### Chat with your Colleagues

- 1 Click on the “Chat” function.
- 2 Click on the “Compose” icon to search and add people for one-on-one or group chat.
- 3 Select the extension(s) and click “OK” to start chatting.

## 02 Your Office Anywhere - The 3CX Apps

### Download the iOS or Android Apps

- ▶ Open your welcome email.
- ▶ Open the app on your device, tap on the menu (top left) and then “Scan QR Code”.
- ▶ Now scan the QR code from your welcome email - done.

### To transfer a call

- ▶ Click “Transfer” or “Att. Transfer”.
- ▶ Enter the extension or search by name, tap “Transfer” and hang up.
- ▶ If Att. Transfer announce the call and click “Transfer”.

### Download the Windows or Mac Apps

- ▶ Open your welcome email.
- ▶ Download the attachment and double click on it.
- ▶ The app will then automatically configure itself.



## 03 Using Your Deskphone



### To make a call

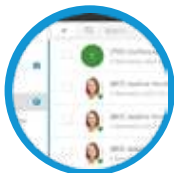
- 1 Dial the number on the keypad and hit the send or enter button.
- 2 OR select a contact or extension from your Web Client or a number from a web page, hit call.
- 3 The Web Client triggers the call on your deskphone if selected via the phone selector toggle.

### 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.
- 3 **Attended transfer Snom:** Press the “Hold” button and dial the extension you want to transfer to. Announce the call and press “Transfer” followed by send/dial and hang up.

## 04 Voicemail



### Setting your Voicemail Greeting

- 1 **By phone:**
  - a. Dial “999”.
  - b. Enter your PIN and then press “#”.
  - c. Select option “9”, then “8” and then “0” to record.
  - d. Press “#” to end recording and “0” to save.
- 2 **From the web client:**
  - a. Go to “Settings” > “Greetings”.
  - b. From here you can set a greeting according to your status.

### To Playback Voicemail



- 1 **By phone:**
  - a. Dial “999” or hit “Voicemail /Message”.
  - b. Enter your PIN, press “#” and then “\*” to play your messages.
- 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, select “Voicemail”, tap on the voicemail and select “Play” to listen to the message.

## 05 Scheduling an Audio/Web Conference



### Creating an ad-hoc Web Conference

- 1 Click on “WebMeeting” in the web client.
- 2 Allow WebMeeting to use the camera and microphone.
- 3 Click on “Invite People” on the right panel to add participants.

### Creating an Audio Conference



- 1 Tap or click on “Schedule Conference” (in the top menu for smartphones).
- 2 “Enable Announcements” to get notified when participants join.
- 3 Add the “Subject” and “Notes”.
- 4 Specify the preferred time.
- 5 Hit “Create Meeting” (Web Client) or “Done” (Android & iOS) and add participants.
  - a. Participants will receive an invitation email with an external dial-in number and a PIN.
  - b. Internal participants will receive an email with an extension and PIN or be called.

