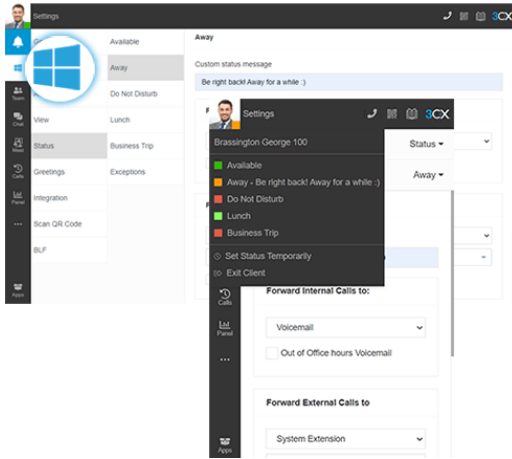


## 3CX on iOS or Android

1. Get the app from the **Google Play** or **Apple App Store**.
2. Open the **“Your User Account on your New 3CX System”** email.
3. With the app, scan the QR code found at the top of the email.
4. Your extension will be set up automatically in seconds.



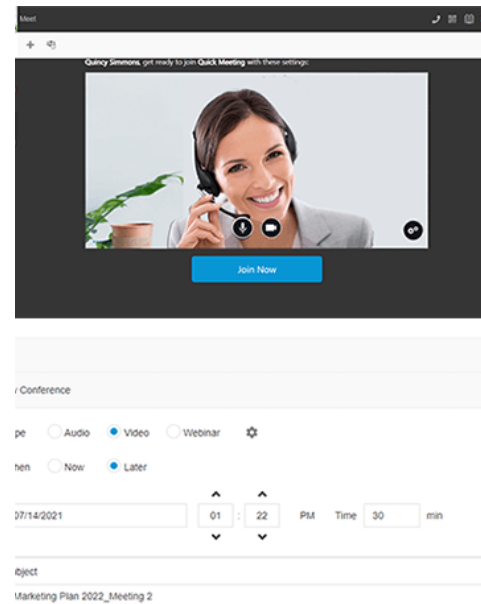
## The 3CX Client



- ✓ 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.
- ✓ Download the Windows Desktop App
  - Click the Windows icon on the left menu > **“Install”**.
  - Click **“Provision”** to automatically connect the App.
- ✓ 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”**.

## Video / Audio Conferencing

- ✓ Create an ad hoc video / audio conference
  - Open Web Client / Windows Desktop App > **“Meet”**.
  - Allow 3CX to access your camera and microphone > **“Join Now”**.
  - To invite participants, copy the link or share via WhatsApp, email.
- ✓ Schedule a conference
  - Click **“+”** in the top menu to create a video / audio conference.
  - Fill in the details > select calendar > **“Create Meeting”**.
  - Click on **“Scheduled Conferences”** to view them.
- ✓ Turn any call into a conference
  - During the call, select **“Conference”** in the phone dialer.
  - Search by name or extension, or add a phone number.
  - Select your participant/s and they will be automatically dialed.



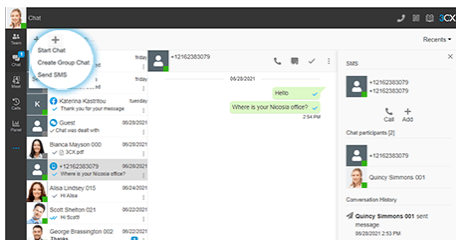
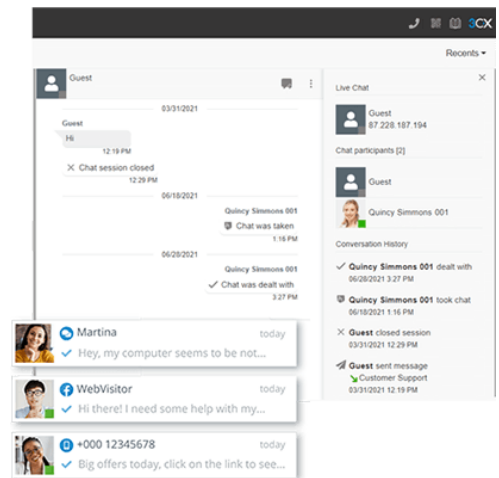
## Using your Deskphone



- ✓ **Make a call**
  - **From the phone:** Dial the number > hit **“Send”** or **“Enter”** button.
  - **From the Web Client:** Select the deskphone via the dialer.
- ✓ **Transfer a call: Blind transfer**
  - **Fanvil:** **“Xfer”** > dial number > **“Xfer”**.
  - **Yealink:** **“Transfer”** > dial number > **“B Transfer”**.
  - **Snom:** **“Transfer”** > dial number > **“√”**.
- ✓ **Transfer a call: Attended Transfer**
  - **Fanvil:** **“Xfer”** > dial number > **“Dial”** > announce caller > **“Xfer”**.
  - **Yealink:** **“Transfer”** > dial number > **“Call”** > announce caller > **“Transfer”**.
  - **Snom:** **“Transfer”** > dial number > **“Attended”** > announce caller > **“Transfer”**.

## Managing Chat Messages

- ✓ **Start a chat**
  - Click **“Chat”** > **“+”** and select **“Start a Chat”** or **“Create Group Chat”**.
  - Select the extension(s) to start chatting.
- ✓ **Receiving customer chat messages**
  - You can view chat conversations routed to queues assigned to you.
  - Distinguish Live chat, Facebook messages by respective icons.
- ✓ **Handling a chat**
  - Choose chat, click the menu **“:”** and select between **“Transfer”**, **“Take”** or other options enabled by administrator.
  - To transfer the chat, search for an agent by name or extension number.



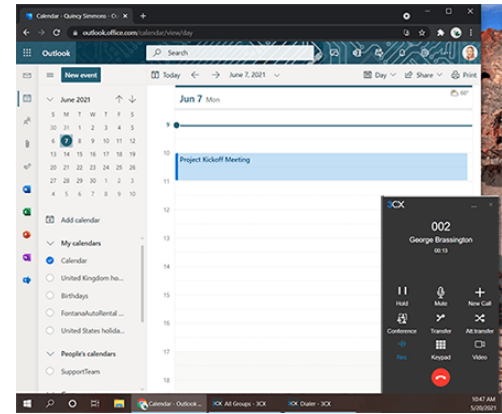
## Sending an SMS / MMS

1. Ensure your extension has SMS enabled by the administrator.
2. Click on **“Chat”** icon > **“+”** > **“Send SMS”**.
3. Type the contact name or number to send an SMS.
4. SMS messages appear with a phone icon in the chat panel.



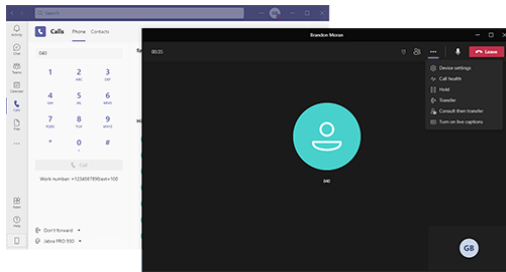
## Using 3CX with Microsoft 365

- ✓ Update your Status
  - In Microsoft 365, go to your Calendar and add meeting.
  - During meeting Status will update to **“Away”** or **“Do Not Disturb”**.
- ✓ Launch calls from the Microsoft 365 interface
  - Ensure you have the Desktop App installed.
  - Click on any number in MS 365, for the dialer to initiate the call.
- ✓ Create new contacts
  - Create your contacts in Microsoft 365.
  - 3CX will automatically sync with MS 365 to update contacts.



## Calling Using Microsoft Teams

- ✓ Make a Call
  - Dial extension number > Hit **“Call”**.
- ✓ Transfer a Call
  - **Blind Transfer**: Click **“...”** > **“Transfer”** > Enter name or number > **“Transfer”**.
  - **Attended Transfer**: Click **“...”** > **“Consult then transfer”** > Enter the name or number > **“Consult”** > Announce caller > **“Transfer”**.
- ✓ Turn call into a Conference
  - Click the **participant icon** > Enter name or number > Hit **“Enter”**.



## Voicemail

- ✓ Set your voicemail via Web Client / Windows Desktop App
  - Go to **“Avatar > Your Name > Greetings”**.
  - Record a new greeting or upload a pre-recorded message.
  - You can have different greetings per status.
- ✓ Set your voicemail greeting via Deskphone
  - Dial the voicemail number indicated in your user account email.
  - Enter your PIN and then press **“#”**.
  - Select option **“9”** then **“8”** and then **“0”** to record.
  - Press **“#”** to end the recording and **“0”** to save.
- ✓ Listen to your voicemail messages
  - **From smartphone**: Tap on **“Voicemail”**.
  - **From Web Client / Desktop App**: Click **“...”** > **“Voicemail”**.
  - **From Deskphone**: Dial your voicemail number or hit **“Voicemail / Message”**, enter PIN, press **“#”** and then **“\*”** to play messages.

