



breakfree
with a software based PBX for Windows



User Manual

3CXPhone

Version 4.0

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Installing 3CXPhone

What is the 3CXPhone?

The 3CXPhone is a small Windows application that allows you to make and receive calls using a head set or via the microphone and speakers of your computer.



Screenshot 1 - The 3CXPhone

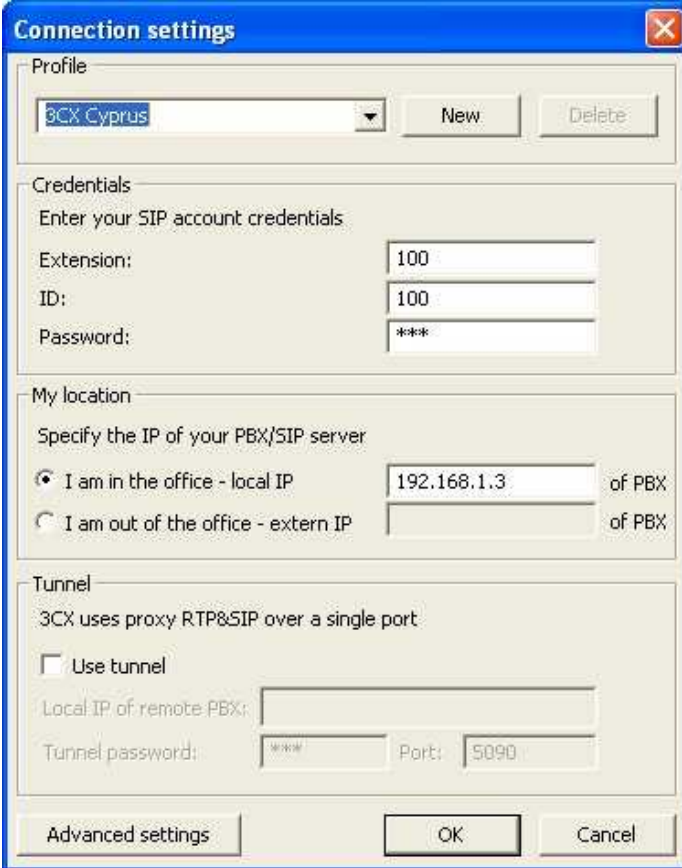
Installing 3CXPhone

The 3CXPhone is a small application and is easy install:

1. Download the latest 3CXPhone from <http://www.3cx.com/downloads/3CXPhone4.msi>
2. Click 'Run' to execute setup. Follow the dialogs.
3. The files will be copied. Click Finish to complete installation.

Configuring 3CXPhone

The first time you start 3CXPhone, you will have to configure a profile to connect to 3CX Phone System / your SIP server. To do this:



Screenshot 2 – Configuring a connection

1. Start 3CXPhone from the 3CXPhone program group or by double-clicking on the tray icon.
2. The first time you start 3CXPhone, it will automatically create a new connection profile. Otherwise, click the new button to create a new profile. Enter a name for the connection
3. Enter your extension number (Auth ID), and your extension SIP credentials (SIP ID and Password)
4. Specify whether this connection is in the office (SIP server is on the same LAN) or outside of the office (You are outside the LAN). If you are in the office, specify the **local IP** of the SIP server. If outside the office, enter the **public IP** of the SIP server.
5. If you are outside the office, you can use the 3CX Tunnel, which tunnels all SIP traffic over a single TCP Port. In this case, tick the option 'Use tunnel', and specify the **local IP** of the SIP server. Specify the Tunnel Password and the remote tunnel port. Contact your administrator for these details. Note that this feature requires 3CX Phone System at the server end.

6. Click OK to create the connection. Once you have logged in successfully, your extension number will be shown at the top on the right hand side. If you are connecting via the tunnel, you will see the tunnel indicator active.

Using the 3CXPhone

Introduction

This chapter explains how to use 3CXPhone.

Making calls

To make a call, simply dial the number on the keypad using your mouse, or enter the number using your keypad. Click the green button with the handset or hit the enter key to instruct the phone to dial the number. 3CXPhone will make the call on the first available line. The button with the handset will turn red. Click on it again to hang up the call.

Answering Calls



Screenshot 3 - Answering calls

As soon as a call comes in, 3CXPhone will ring, bring the phone to the front and show the incoming call on the screen of the phone. If the phone is minimized, a pop-up will appear.

To answer the call, click on the green handset button or hit the 'Enter' key.

To reject the call, click on the red handset button or hit the 'Escape' key. The caller will be treated as if your phone was busy. The forwarding settings for 'Call Busy' will be triggered.

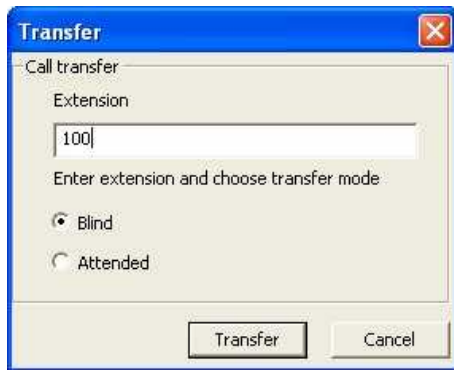
If you are not able to take the call, you can transfer it to voice mail by clicking on the icon with the envelope.

You can answer a call by hitting the "Enter" key, or cancel a call by hitting the "Escape" key

Transferring calls

3CX VoIP allows you to easily transfer calls. To transfer an existing call:

1. Click on the transfer button.



Screenshot 4 - The transfer dialog

2. In the 'Transfer' Dialog, enter the extension number to which you want to transfer the call.
3. Now select 'Attended Transfer' or 'Blind Transfer'. An attended transfer allows you to speak to the target extension first. Click the transfer button to actually transfer the call. If you select blind transfer, the call will be immediately transferred to the target extension

Recording a call

You can record a call simply by clicking on the record call button. This will record the current call in progress and save it as a wav file. You can access the recordings by going to Calls > Recordings.

3CXPhone Preferences

Preferences

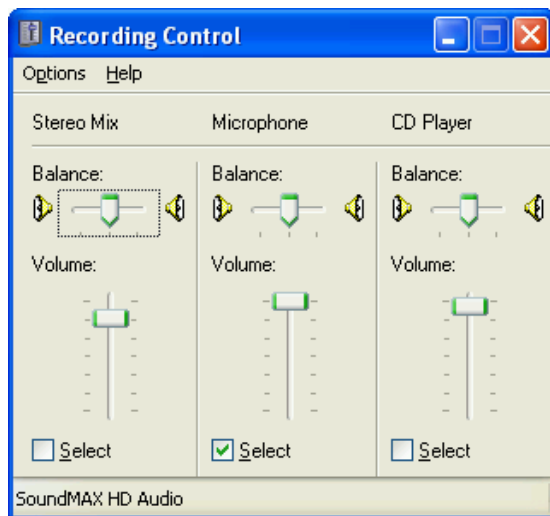
The preferences dialog allows you to set your 3CXPhone preferences. You can configure the following options:



Screenshot 5 - Preferences

- Caller ID – Specify a caller ID that you want to have shown on your calls.
- Select which sound device as Microphone, for playback and for ring tones.
- Set your preferred visual look for the phone
- Select your preferred interface language
- Tick the option “Automatically start 3CXPhone when Windows starts”, so that 3CXPhone will automatically run in the System Tray each time Windows starts.

Adjusting Microphone level



Screenshot 6 - Adjusting the Microphone level

The microphone audio level is set by the sound card driver in Windows. To adjust it:

1. Go to Windows Control Panel and double click on 'Sounds and Audio Devices'. In the Audio tab, click on the Volume button in the Sound Recording section, then use the sliders to adjust the microphone recording level.
2. Alternatively, double click the speaker icon in the Windows taskbar. Go to Properties and from the Mixer device drop down menu select an Input device, click on OK to continue. Moving the sliders up or down will adjust the microphone recording level accordingly.

Using a Plantronics Headset

3CXPhone supports the use of Plantronics headsets. To use such headsets, you need to install the driver software called Personocall. This can be downloaded from the Plantronics website. The following features are supported:

When a call comes in, you will hear a beep on the Plantronics headset and you can answer the call by pushing the main answer/reject button.

To hang up a call, press the main answer button on the Plantronics device.

You can also MUTE from the Plantronics device. This is one by pressing IN the TOP VOLUME BUTTON inwards. The device will play a series of beeps and mute the call. Pressing the same switch inwards again, will un mute the call.