



breakfree  
*with a software based PBX for Windows*



# User Manual

**3CX VOIP client / Soft phone**

**Version 5.1**

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## Installing 3CX VOIP client

### What is the 3CX VOIP client?

The 3CX VOIP Client is a small Windows application that allows you to make and receive calls via your desktop phone or using a headset connected directly to your computer.

You can see the extension numbers of other users and whether they are available to take calls. Important is that you can use the 3CX VOIP client without having to use the headset - you can continue to use your desk based phone if you prefer.

The 3CX VOIP client ships with all editions of 3CX Phone System, including the Free edition. However, in the Small Business, Pro and Enterprise editions, the 3CX VOIP client allows you to see the presence of other users on the phone system. In the FREE edition, other extensions appear greyed out.

### Installing 3CX VOIP client

The 3CX VOIP client is a small application and is easy install:

1. Download the latest 3CX VOIP client from <http://www.3cx.com/downloads/3CXVoipClient.msi>
2. Click 'Run' to execute the setup process. You will be prompted for your preferred interface language and to select a location.
3. The files will be copied. Click Finish to complete installation.

### Running 3CX VOIP client



#### Screenshot 1 – Login to 3CX Phone System

Now start 3CX VOIP client from the 3CX VOIP Client program group or by double-clicking on the tray icon. The first time you start it, you will be prompted for your extension number and Voice mail pin number, as well as the server name. By default, your voice mail pin number is identical to your extension. You can change this later if you wish.

1. Now select whether you are using a desk phone, or whether you are using a headset connected directly to your computer. In this case, 3CX VOIP client will act as a complete software SIP phone.
2. Specify whether you are connecting from inside the office or from outside the office. If you specify Outside the office, click on 'Settings' to configure the connection accordingly (You will have to specify the public IP of your 3CX Phone System)
3. Click OK to start 3CX VOIP client. Once you have logged in successfully, your extension number will be shown in the phone screen.

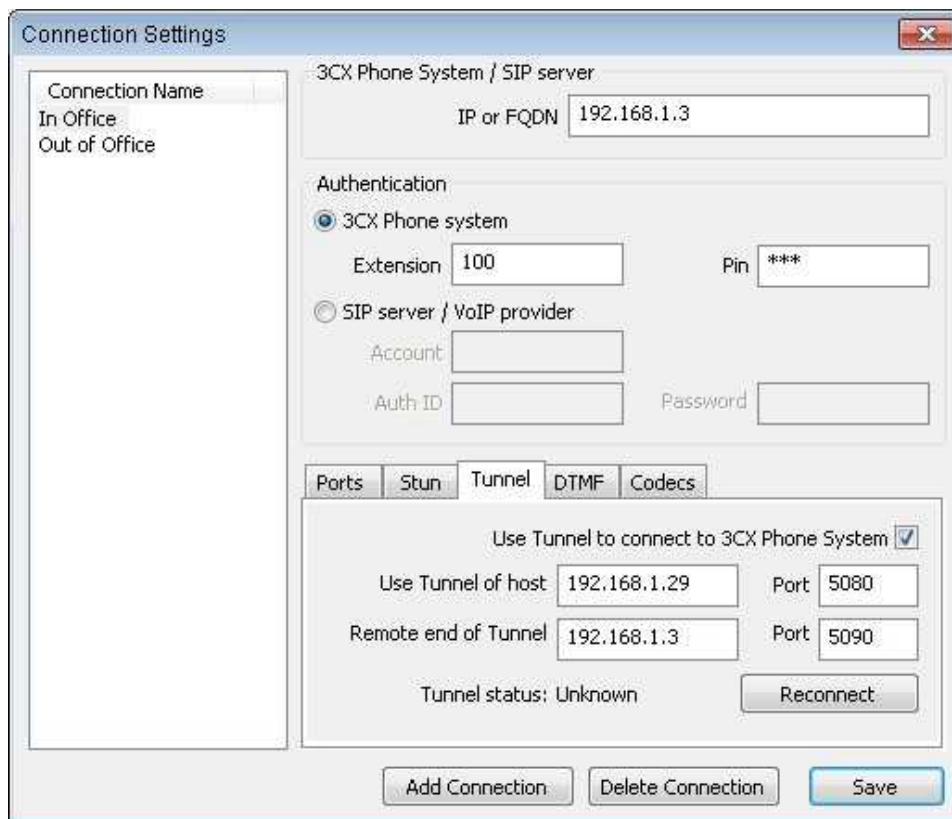
## Configuring Connections

In addition to the standard profile for use on an internal network, 3CX VOIP client can be configured to use different connection profiles to connect to 3CX Phone System or any SIP server, depending on whether you are in the office or out of the office. Each connection profile can have different settings.

### Configuring an Out of Office connection using the 3CX Tunnel

To simplify firewall configuration, you can use a 3CX Tunnel, which tunnels all SIP traffic over a single TCP Port. To set-up a connection profile using a 3CX Tunnel:

1. Select File > Connections from the menu



Screenshot 2 –Creating an Out of the Office Connection

2. In the Connection Settings dialog, click on the 'Out of Office' connection and specify the internal IP of 3CX Phone System on the right hand side. If in doubt, contact your administrator.
3. In the section 'Authentication', select '3CX Phone System' and enter your extension number and pin code.
4. Click on the tab 'Tunnel'. Tick the option 'Use 3CX tunnel', then specify the public IP and port of the 3CX Phone System in the field "Remote end of Tunnel".
5. Click Connect to check that the tunnel is working
6. Click on the Save button to exit the dialog. You can rename the profile by right-clicking on the profile and give it a different name.

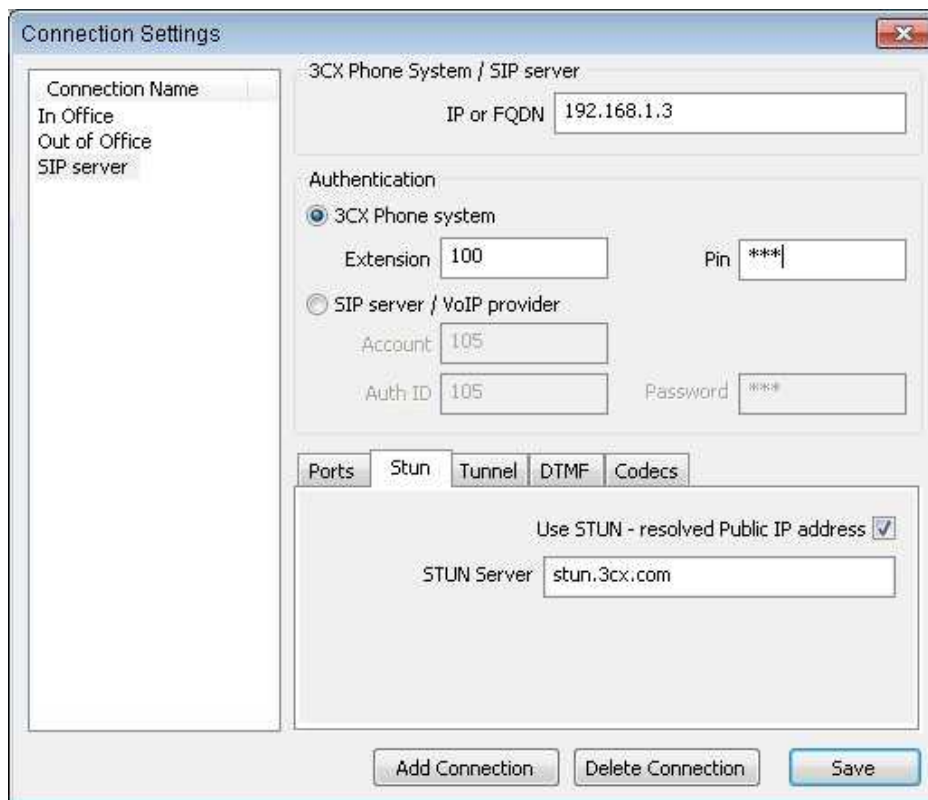
To switch to 'Outside the office mode' from within the phone, select 'Action > Connection > Out side the office' from the menu. The connection will be re-established with the new connection settings.

*Note: If you wish to use a 3CX Tunnel installed on a different host, simply enter the IP of the host with the 3CX Tunnel service installed. In this case you must configure the Remote end of the Tunnel on that machine.*

### Configuring a "direct" Out of Office connection

If you want to create an Out of Office connection that does NOT use a 3CX Tunnel, then configure the connection profile as follows:

1. Select File > Connections from the menu



Screenshot 3—Creating an Out of the Office Connection

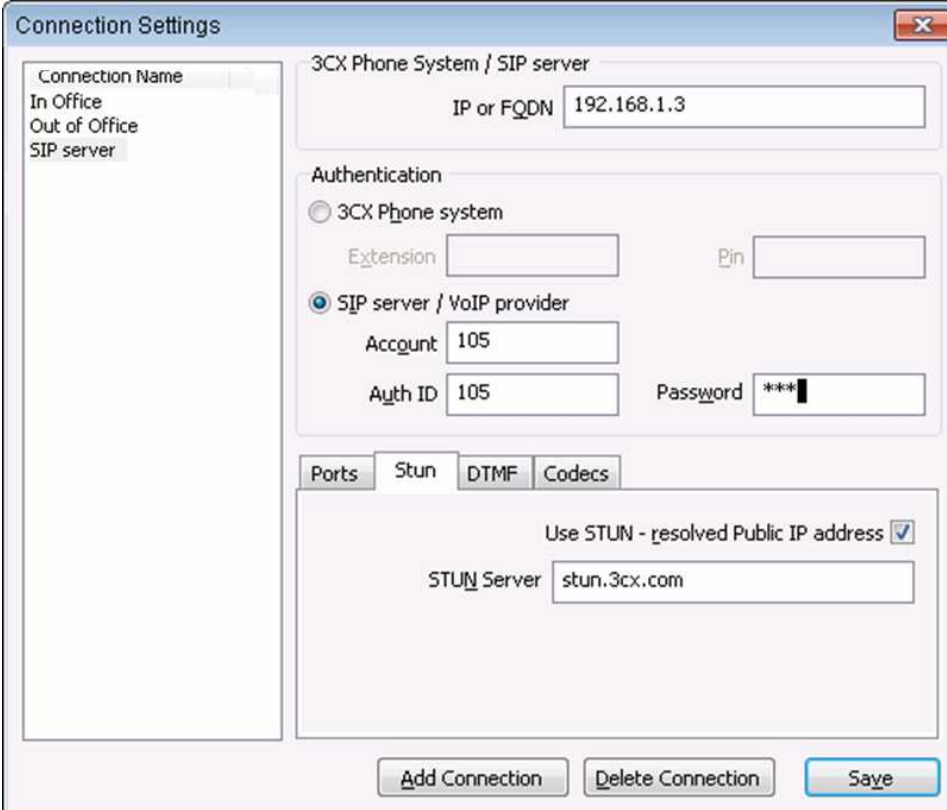
2. In the Connection Settings dialog, click on the 'Out of Office' connection and specify the public IP of 3CX Phone System on the right hand side. If in doubt, contact your administrator.
3. In the section 'Authentication', select '3CX Phone System' and enter your extension number and pin code.
4. Click on the tab 'STUN' and enable the option "Use STUN – Resolved Public IP Address'. Leave the default STUN server or enter another one.
5. Now click Save. You can rename the profile by right-clicking on the profile and give it a different name.

To switch to 'Outside the office mode' from within the phone, select 'Action > Connection > Out side the office' from the menu. The connection will be re-established with the new connection settings.

### Configuring a profile to connect to a VOIP provider/SIP server

If you want to create connection that must connect to a VOIP provider, or other SIP server (for example Asterisk), then create the connection as follows:

1. Select File > Connections from the menu. Click on the 'Add Connection' button to create a new connection profile.



The screenshot shows the 'Connection Settings' dialog box. On the left, a list of connection profiles includes 'In Office', 'Out of Office', and 'SIP server'. The 'SIP server' profile is selected. The main area is titled '3CX Phone System / SIP server' and contains the following fields:

- 'IP or FQDN' field with the value '192.168.1.3'.
- 'Authentication' section with two radio buttons: '3CX Phone system' (unselected) and 'SIP server / VoIP provider' (selected).
- Under 'SIP server / VoIP provider':
  - 'Extension' and 'Pin' fields (empty).
  - 'Account' field with the value '105'.
  - 'Auth ID' field with the value '105'.
  - 'Password' field with masked characters '\*\*\*'.
- 'Ports', 'Stun', 'DTMF', and 'Codecs' tabs are visible.
- Under the 'Stun' tab:
  - 'Use STUN - resolved Public IP address' checkbox is checked.
  - 'STUN Server' field with the value 'stun.3cx.com'.

At the bottom of the dialog are three buttons: 'Add Connection', 'Delete Connection', and 'Save'.

#### Screenshot 4 –Creating an Out of the Office Connection

2. Now specify the IP of the VOIP provider or SIP server on the right hand side. If in doubt, contact your administrator.

3. In the section 'Authentication', select 'SIP server / VOIP provider' and enter the Account (usually your VOIP provider number or Extension number) and your assigned Authentication ID and Password.
4. If connecting to a VOIP provider or remote SIP server, click on the tab 'STUN and enable the option "Use STUN – Resolved Public IP Address'. Leave the default STUN server or enter another one.
5. Now click Save to save the connection profile.

To switch to this connection from within the phone, select 'Action > Connection > Connection name' from the menu. The connection will be re-established with the new connection settings.

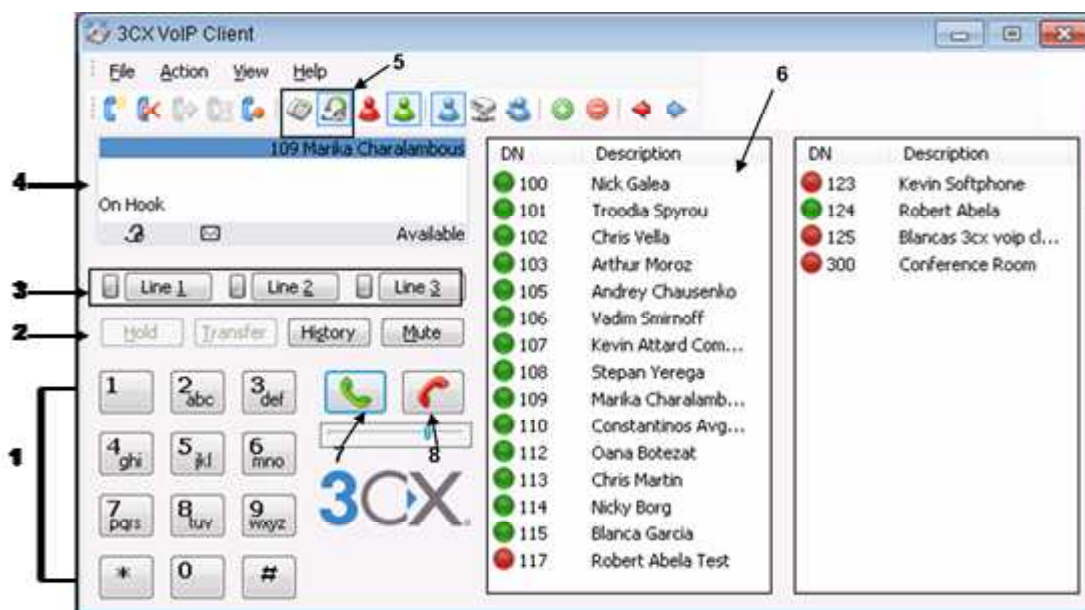


## Using the 3CX VOIP client

### Introduction

3CX VOIP client can work as a soft phone or it can work in combination with a desk phone. This chapter explains how to use 3CX VOIP client as a soft phone, then explains how it can be used with a desk phone and finally it discusses the common features, available in both 'modes'.

### Using the 3CX VOIP client as a SIP phone




Screenshot 5 - 3CX VOIP client in SIP phone mode

- |                    |                 |
|--------------------|-----------------|
| 1. Dial Pad        | 5. Phone modes  |
| 2. Phone functions | 6. Status panel |
| 3. Lines           | 7. Dial         |
| 4. Status screen   | 8. Hang up      |

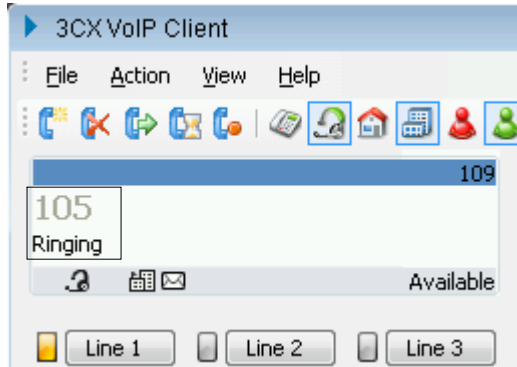
If you selected to use 3CX VOIP client with a head set, then the 3CX VOIP client will work as a SIP Phone, and the interface will resemble a phone.

### 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  or hit the enter key to instruct the phone to dial the number. 3CX VOIP client will make the call on the first available line.

## Answering Calls

As soon as a call comes in, 3CX VOIP client will ring and show the incoming call on the screen of the phone. It will also pop up a small dialog in the system tray informing you of the new call.



### Screenshot 6 – Answering Calls

The incoming call will light up the LED on the first available line.

To answer the call, click on the answer button <insert button> or hit the 'Enter' key. If you already have a call active, the call will be received on the second line, and the LED on the second line will flash. To answer this call, click on the line 2 button first. Your call on line 1 will automatically be put on hold and the LED on line 1 will flash.



If you wish to reject a call, click on the red hang-up button or hit the 'Escape' key. The caller will then be treated as if your phone was busy. The forwarding settings for 'Call Busy' will be performed.

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

## Transferring calls

### Blind transfer

A blind transfer transfers the call to another extension without first speaking to the target extension. To perform a blind transfer:

1. Click on the transfer button 
2. Dial the destination number or double-click on the extension in the status panel and click on the dial button  or hit the 'Enter' key.

### Attended transfer

An attended transfer is performed by first calling the target extension and speaking to the person who is to take the call. To perform an attended transfer:

1. Click on the 'Line 2' button and dial the number of the extension you wish to reach. Alternatively double-click on the extension in the status panel. The call on 'Line 1' will automatically be put on hold.

2. After you have introduced the caller to the user of the extension, click on the transfer button and click on 'Line 1' to connect both extensions.

## Recording a call



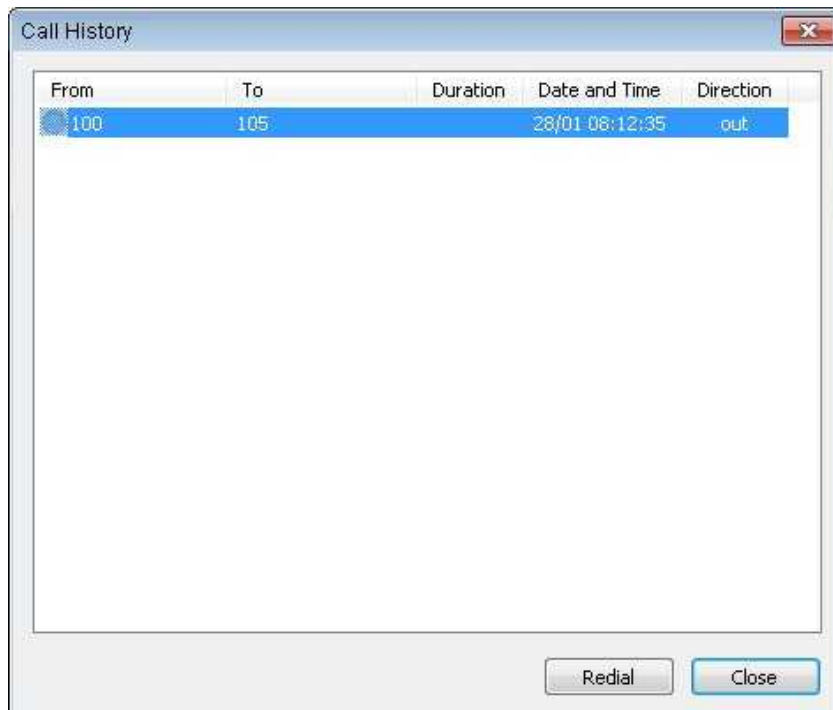
### Screenshot 7 – Recording a call

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 on the server.

## Transferring calls to voice mail

If you are unable to take a call, you can transfer the call to your Voice mail. You can do this by clicking on the icon in the menu bar, or the menu item Action > Transfer to Voice mail. The caller will be transferred to your voice mail box where he can leave a message.

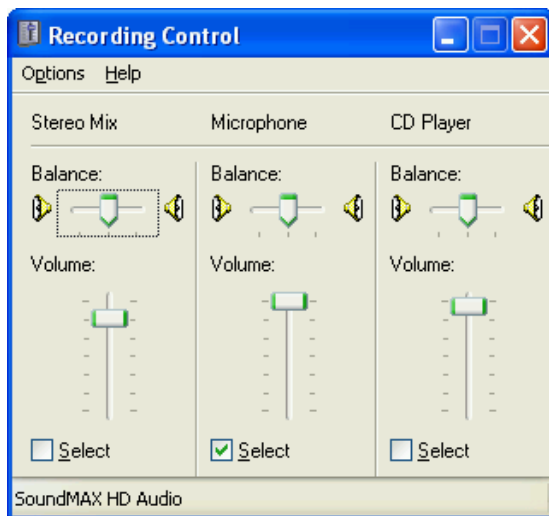
## Call History



### Screenshot 8 – Viewing Call History

You can view the history of calls received and placed by clicking on the 'History' button. To place a call to a number in the call history, simply double-click on the number to launch a call to that number. Alternatively select the entry and click the Redial button.

## Adjusting Microphone level

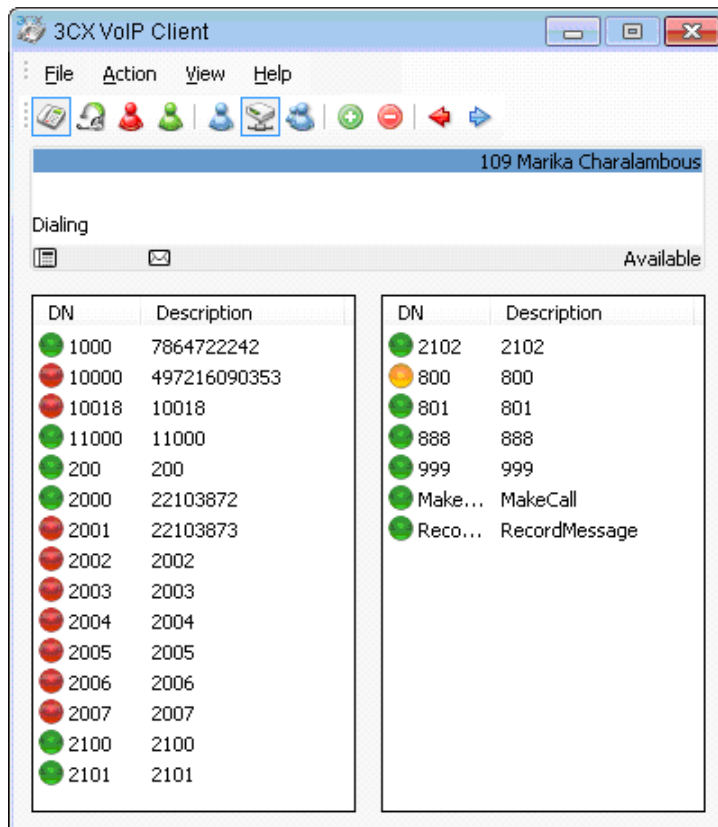


### Screenshot 9 - Adjusting the Microphone level

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 3CX VOIP client with a desk phone



**Screenshot 10 – Using the VOIP client as a desk phone**

If you selected to use 3CX VOIP client with a desk phone, the interface will not have a dial pad – all phone calls will be made and received via your desk phone. However, you can see the status of other users on the phone system, as well as monitor extension status via the status screen.

## Features common to both VOIP client and Soft phone mode

### Status screen



1. Extension number
2. Soft Phone/Desktop mode
3. In office/Out of office mode
4. Voicemail
5. Available/Away

**Screenshot 11 – Status Screen**

The status screen on the phone summarizes important information. It shows

- Your extension number and name
- If you have voice mail waiting and if so, how many

- Whether you are using a desk phone or using the client as a SIP phone
- Whether your phone is set to 'in the office' or 'out of the office' mode
- Whether your status is set to 'Available' or 'Away'

Furthermore, when you make or receive a call, the number to be dialled OR the caller ID of the caller is shown in the middle of the status screen. Just below it you will get information messages about the progress of the call.

### Extension, Line & Queue Status

3CX VOIP client has an 'Operator panel' which allows you to see the status of other users. In the FREE edition, other extensions will appear as greyed out. Presence information is only available in the commercial editions.



**Screenshot 12 - Presence filter buttons**

By default all extensions, lines and queues are listed, however you can filter them using the tool bar buttons.



**Screenshot 13 - Adding / Removing columns**

You can expand the operator panel to more than one column using the plus and minus buttons in the toolbar.



**Screenshot 14 - Skip to remaining extensions**

If you do not want to expand the columns, and not all the extensions fit, you can click on the arrow buttons to browse the remaining extensions in the last available column.

### Logging into a Call Queue

Call queues allow calls to be queued in case all agents are busy. The actual configuration of who is an agent for a particular Call Queue is done from the 3CX management console. However, if you are an agent for a queue, you need to login to the queue to actually start taking calls. This avoids calls being sent to your extension without you being available.

To login to all Call Queues that you are a member of, select Action > Queue > Login to all Queues from the Menu. From that point onwards you will be routed calls as they come into the queue.

### Specifying Away/Available status



**Screenshot 15 – Specifying Away status**

If you temporarily can not answer the phone, you can specify that you are 'Away'. This will show your colleagues that you are not in a position to answer calls, as well as handle any calls according to the "Phone busy" setting configured for your extension.

To set your extension status, select "Available" or "Away" from the toolbar. Note that this setting will persist even if you shut down 3CX VOIP client!

## Preferences

The preferences dialog allows you to set your 3CX VOIP client preferences. You can change your extension options by clicking on the 'Change Extension options' button. This will launch your default browser and connect the 3CX Phone System User portal.



**Screenshot 16 - Preferences**

You can also configure the following options for 3CX VOIP client:

- Tick the option "Automatically start 3CX VOIP client when Windows starts", so that 3CX VOIP client will automatically run in the System Tray each time Windows starts.
- Tick the option "Log me in automatically" so that 3CX VOIP client will use the last entered credentials to login automatically to 3CX Phone System.
- The option "Show Menu Bar" hides or shows the menu bar in the main interface.
- The option "Action on Ringing" allows you to define how you want 3CX VOIP client to notify you when you receive an incoming call:
  - a. Show answer dialog – this option will show a dialog which will allow you to answer, reject or send the call to voice mail
  - b. Show notification popup – this option shows a small popup notifying you of an inbound call.

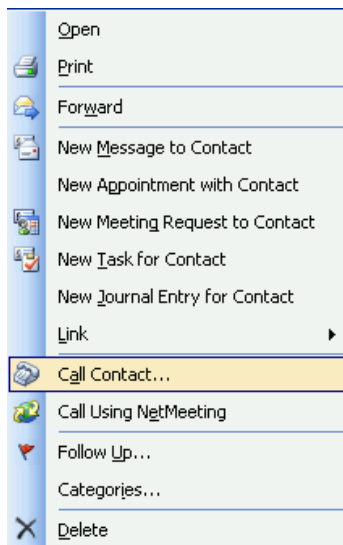
- c. Bring main window to front – This will bring 3CX VOIP client to the front of all dialogs.
- You can select your preferred interface language using the selector
- In the 'Multimedia devices' section, you can select which audio device you wish to use for speaking, ringing and listening

## Launching calls from Microsoft Outlook

### Introduction

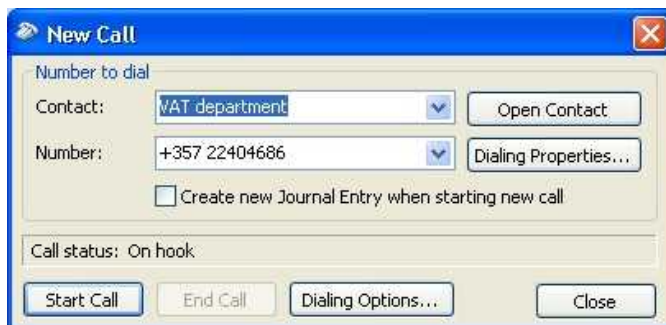
*This feature requires a commercial edition of 3CX Phone System for Windows*

If you use Microsoft Outlook or any TAPI compliant application, and store all your phone numbers in Outlook contacts, you can easily launch calls directly from Outlook. To do this:



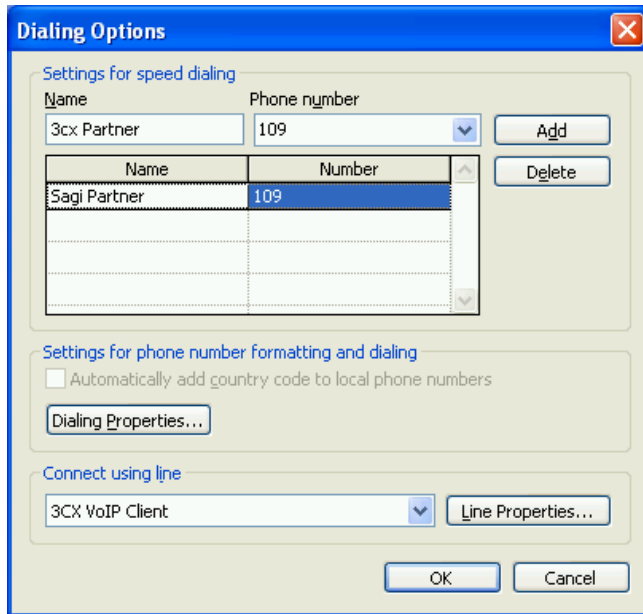
**Screenshot 17 - Right click on a contact**

1. Right click on the contact in Microsoft Outlook, and select 'Call contact'



**Screenshot 18 - Microsoft Outlook New Call dialog**

2. The Microsoft Outlook New Call dialog will appear. The first time you use the Microsoft Outlook integration, click on 'Dialing Options'



### Screenshot 19 - The Dialing Options dialog

3. In the section 'Connect using line', select the entry 3CX VoIP Client. Click OK to exit the dialog.

4. Now you can click the start call button. The call will be launched using the 3CX VOIP client.

Note: If you are using the 'Desk phone mode', then the call will be set-up to your desk phone.