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 / Mac Desktop App
  ○ Click the OS 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 / 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”.

Using SMS, WhatsApp & Live Chat

✓ Start a chat
  ○ Click “Chat” > “+” and select “Start a Chat” or “Create Group Chat” or “Send SMS”. You cannot initiate a Live Chat or a WhatsApp chat.
  ○ Select the extension(s) or number(s) to start chatting.

✓ Receiving a chat
  ○ You can view chat conversations routed to your extension, groups or queues you are a member of.
  ○ Distinguish between Live Chat, WhatsApp & SMS by their 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 agent by name or extension number.
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.

Voicemail

✓ Set your voicemail via Web Client / 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.