

Using Your Desk Phone

Setting up your Voicemail Greeting

Have your Welcome to 3cx email handy!!

Steps for Initial Setup

1. Record Voicemail Message: Press envelope icon on phone, enter PIN provided in welcome email followed by #, Press 9, Press 8, Press 0, Record Greeting, Press # when finished, Press 0 to save greeting.
2. Record Self Identification Message: Press envelope icon on phone, enter PIN provided in welcome email followed by #, Press 9, Press 5, Press 0, Record Name, Press # when finished, Press 0 to save.

Checking Your Voicemail

Voicemails will be sent to your email. If you would like this setting changed, please see your phone administrator

Placing Calls

Note: When dialing a local outside number, just dial the 7-digit number and #(send). The new phone system does not require a 9, 1, or area code. When calling long distance dial the area code and 7-digit number and #(send).

Using the handset:

1. Pick up the handset.
2. Enter the desired number using the keypad and press  or the **Send** soft key.

Note: During a call, you can alternate between Speakerphone and Handset modes by pressing the Speakerphone key, or by picking up the handset.

Using the hands-free speakerphone mode:

1. With the handset on-hook, enter the desired number using the keypad.
2. Press , or the **Send** soft key.

Busy Lamp Fields (Speed Dials)

Your phone has several BLF button on the top screen. To dial one of those extensions just press the associated button. If the button is green that extension is available. If it's red, that extension is on another call.



Answering Calls

Using the handset:

1. Pick up the handset

Using the hands-free speakerphone mode:

1. Press  or with the handset on-hook, press the **Answer** soft key

Ending Calls

1. If you are using the handset, press the **EndCall** soft key or hand up the handset
2. If you are using the speakerphone, press  or the **EndCall** soft key.

Redialing Numbers

To redial the last dialed number from your phone:

1. Press  twice when the phone is idle

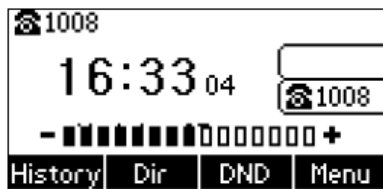
To redial a previously dialed number from your phone:

1. Press  when the phone is idle or History soft key.
2. Press  or  to select the desired number, and then press  or **Send**

Volume

To adjust the volume when the phone is idle or during a call:

Press  to adjust the ringer volume.



Call Mute

To mute a call:

1. Press  during an active call. The LCD screen will show that the call is now muted.



To un-mute a call:

1. Press  again to un-mute the call.

Call Hold and Resume

To place a call on hold:

1. Press the **Hold** soft key during an active call.

To resume the call:

1. Press the **Resume** soft key

Call Transfer

To transfer a call to another extension:

1. Press  or the **Tran** soft key during a call. The call is placed on hold.
2. Enter the extension number you want to transfer to.
3. Press  or the **Tran** soft key. Hang up the handset.

Do Not Disturb (DND)

To activate DND:

1. Press the DND soft key when the phone is idle
2. The  icon on the status bar indicates that DND is enabled. Phone calls will be forwarded to voicemail.

3CX Phonebook

To see phone list of extensions:

1. Press the 3CX Phonebook soft key.
2. Press 3CX Phonebook again.
3. Scroll the list or hit the search button to find the person/extension.
4. Highlight the extension you wish to call and press the send soft key.

Using the 3CX Web Client

Have your Welcome to 3cx email handy!!

Logging in

1. Click the link in the email (similar to this): <https://yourschool.mn.3cx.us/>
2. Login in using the credentials received in your welcome email or by using the Google button.

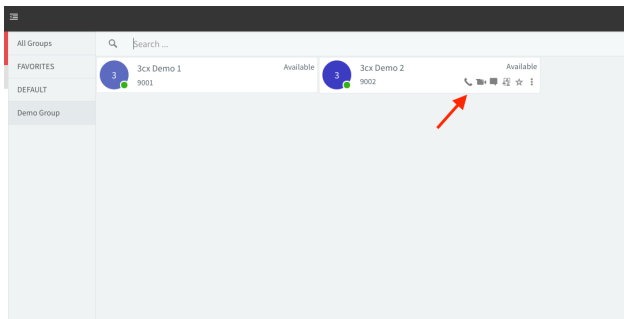
Placing a Call

Once logged in, you will see a dashboard of all the extensions in your group. This is typically organized by building.

Place a call using the phone icon:

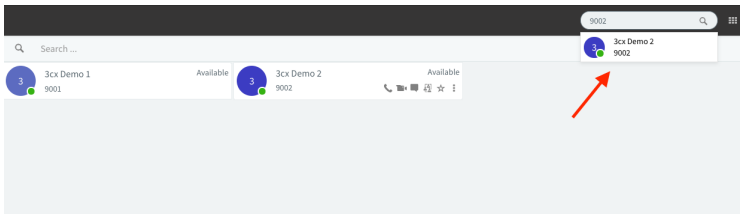
1. Click the phone icon next to any name to make a call

*Note: The first time you place a call, click **Allow** for use your microphone*



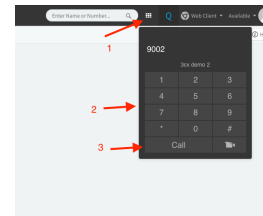
Place a call by searching

1. Search for the name or extension in the search bar. Clicking on the extension searched will start dialing



Place a call using the dialpad

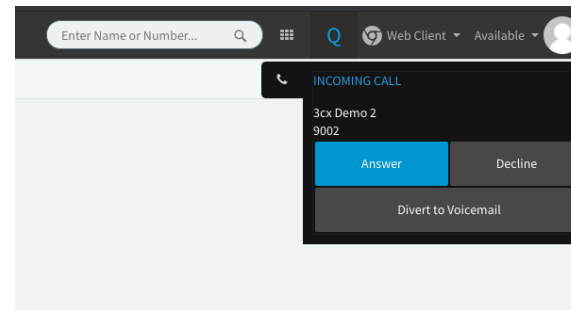
1. Click the dialpad icon
2. Use the numbers on your keyboard, or click each digit with your mouse
3. Click Call



Answering a Call

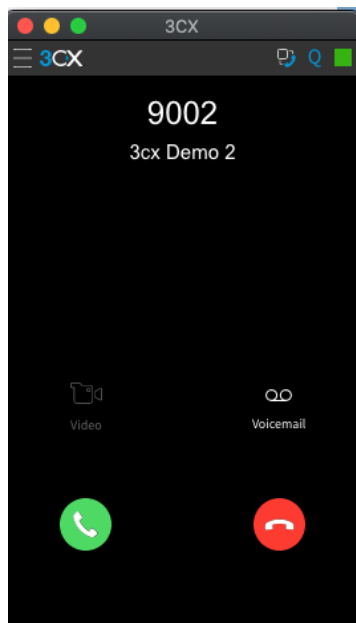
With the Web Client Open:

1. A pop up window will appear in the upper right corner.
2. Click Answer, Decline, or Divert to Voicemail

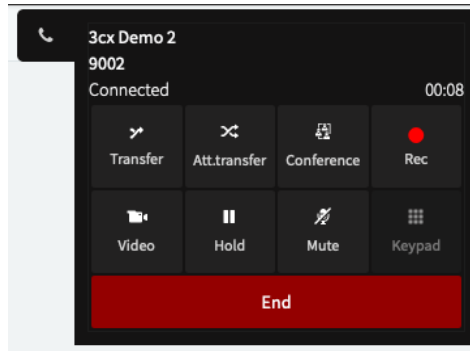


With the Web Client closed:

1. A pop up window will appear on your screen
2. Click Answer, Decline, or the Voicemail button to send the call to your voicemail



In Call Features



Once a call is answered, you have the following options:

1. **Transfer** - will transfer the call without the need for you to speak to the receiver. Click the Transfer button, search for and click the extension.
2. **Conference** - allows you to create an ad hoc conference call, adding more participants to join the conversation
3. **Video** - Allows you to start a video chat
4. **Hold** - Put the caller on hold
5. **Mute** - Mute and unmute the caller

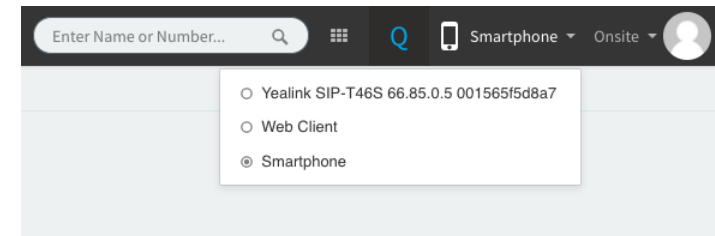
Chat

1. Click the Chat icon next to any extension



2. A chat window will open for you to compose a message.

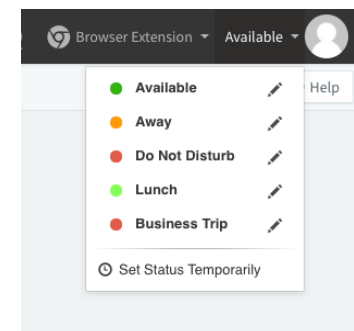
Changing which device will ring



Change Your Status

In the upper-right corner, you can change the status of your extension to the following:

1. **Available** - Your extension is available for calls
2. **Away** - calls will be forwarded to Voicemail
3. **Do Not Disturb** - same as Away status (calls will be forwarded to voicemail)
4. **After Hours** - Desk phone rings, app on smartphone does not ring.
5. **Set Status Temporarily** - Allows you to change status for a predetermined period of time

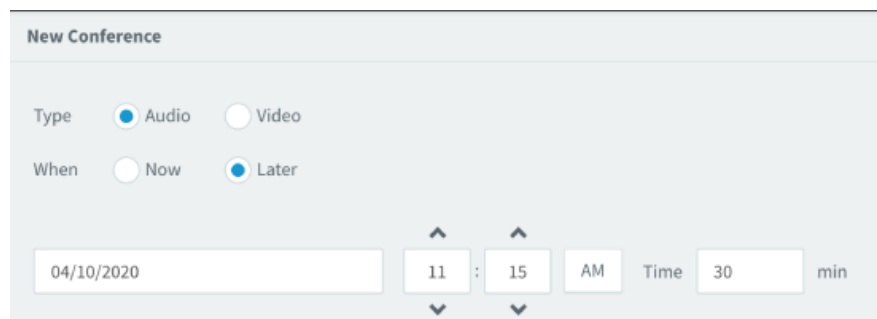


Scheduling a Conference Call

1. In the Web Client, click on “Schedule Conference”.
2. Choose your conference type (Audio or Video) and select “Now” to begin the meeting right away.
3. Fill in all the details including “Subject” and “Notes to Participant” and select the calendar you wish to use to send out the invitations
4. Choosing the 3CX (direct eMail) will allow you to add participants at this step. Once added, click “Create Meeting”. The call will be initiated and participants will connect.
5. If you choose a different calendar (ex. Google), the calendar entry form will open to allow you to further customize the meeting details and invite participants. Each participant will receive an email invitation with details on how to connect.

Scheduling a Conference/WebMeeting for a Later Date

1. Select “**Later**” when entering the conference details.
2. Choose the time and date for the conference
3. An email invitation will be sent to all participants. Those who accept will automatically receive a call at the scheduled time. Participants outside the organization will need to follow the steps in the email invitation
4. You can view and edit scheduled conferences by clicking on “**Schedule Conference**” in the Web Client



Start a Quick WebMeeting

1. In the Web Client, click WebMeeting on the left hand side

2. Click Join Now, and allow 3cx access to your microphone and camera

Invite Participants to Your Quick WebMeeting

1. In the upper right corner, click the  icon
2. Type in the Name and Email address of the participant and click Add to invite additional participants
3. Click Ok

4. Or click the  icon, copy and paste the link into an email to the participant(s)

Using the 3cx App on your mobile device

Have your Welcome to 3cx email handy!!

Download the App

Download the 3CX Communication System app from the App Store for iPhone, or the 3CX Android App from the Google Play store for Android.



Setting Up the App

1. Open the Welcome to 3cx email on your computer or other device besides your cell phone, and click the attached QR code at the bottom
2. Open the newly installed 3cx app on your mobile phone
3. Accept the permissions and click Agree on the license agreement
4. You will see a Welcome to 3CX screen. Click the arrow on the bottom right to proceed
5. On the next screen, select Scan QR Code, and click OK for allowing permission to your camera
6. Hold your phone up to the QR code in the email. Your phone is now set up under your account!

Note: if you have already downloaded the app and did not go through the initial QR code scan, you can click the 3 lines in the upper left corner and press Scan QR Code

Placing a Call

Simply enter a number via the dialpad and press call, or view contacts and search by name or extension number. Press on the contact to enter the contact menu and select "Call"

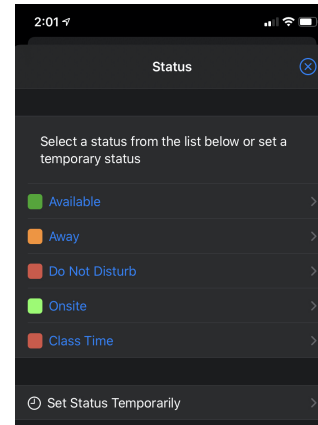
Call Options

The following options are available once in a call:

1. **"Transfer"** will allow you to transfer the call to another extension
2. **"Conference"** allows you to add more participants to the call.
3. **"Video"** let's you take your call up a notch by adding video to the mix.
4. **"New call"** places the current call on hold to make a new one.

Changing Your Status

In the upper right corner, click the green square to view the available status options. You can change your status by pressing one of the options. You can also customize the options of each by pressing the arrow (ex. Set status to DND, and forward call to another extension)



Silencing incoming call

You really can't stop your phone from ringing once the app is installed. However you can set the ringtone to "silent" so it doesn't ring out loud.

1. In the app, press the 3 lines in the upper left corner
2. Press settings
3. Press Ringtone
4. Press Silence, then settings, settings, X to exit.

Don't forget to change it back when you want it to ring.

Joining a Conference

1. Press the 3 lines in the upper left corner
2. Press Conference
3. You will see your list of Active or Scheduled conferences
4. Press the conference to join via the app

Link to online user manual:

<https://www.3cx.com/user-manual/>