Your communications Dashboard -The 3CX Web Client

Logging on

- 1 Retrieve your credentials from your Welcome Email.
- 2 Go to e.g. https://mycompany.3cx.com/webclient/
 - B Enter your extension and password.



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Make, Receive & Transfer Calls

- Make a call by clicking on an extension or enter name/number in the search box.
- Toggle the phone icon to trigger a call on your smartphone, deskphone or web client.
- 3 Transfer a call by clicking "**Transfer**" or "**Att. Transfer**", enter the extension or name.
 - a. To blind transfer click "Transfer" and hang up
 - b. If Att. Transfer announce the call and click "Transfer".

Manage your Status

- 1 Set your status and status message by clicking on the drop down menu next to your avatar.
- 2 Click on the pencil to add a status message.
- 3 Set status temporarily to time limit your status automatically.
- 4 Green means available, yellow on a call, red is busy calls will be diverted to voicemail.





Chat with your Colleagues

- 1 Click on the "Chat" function.
- 2 Click on "+" to create a new chat or "new group" for group chat.
- Select the extension(s) and click "**OK**" or tap "**Done**" to start chatting.

Call numbers from web pages The Click2Call Extension

- 1 Install the Chrome or Firefox extension.
- 2 Configure it like so and refresh your browser.
- 3 Clicking on a number will launch the 3CX dialer.

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More Click2Call tips here

Check out the HELP page Find out what else you can do with your Web Client

Your Office Anywhere – The 3CX Apps

Download the iOS or Android Apps:

- Open your welcome email.
- Open the app on your device tap on the menu

- (top left) "Scan QR Code".
- Now scan the QR code from your welcome email – done!

See more iOS tips

See more Android tips







Download the Windows or Mac Apps:

- Open your welcome email.
- Download the attachment and double click on it.
- The app will then automatically configure itself.

See more Windows tips

See more Mac tips

To transfer a call:

- Click "Transfer" or "Att. Transfer".
- Enter the extension or search by name, tap "Transfer" and hang up.
- If Att. Transfer announce the call and click "Transfer".





Using your Deskphone

To make a call:



- 2 OR select a contact or extension from your web client or a number from a web page, hit call.
- 3 The web client will trigger the call on your deskphone if the toggle is correctly set.





To transfer a call:

- For blind transfer: Press "Transfer", dial the extension, press send/dial and hang up.
- Attended transfer Yealink: Press "Transfer", dial number or select extension, press "Send", announce the caller, press "Transfer" and hang up.
- Attended transfer Snom: Press the "Hold" button and dial the extension you want to transfer to. Announce the call and press "Transfer" followed by send/dial and hang up.

See detailed Transfer,

Voice Mail & Conference guides for all IP Phones



Setting your Voicemail Greeting

By phone:

- a. Dial **"999"** if 999 is an emergency number dial **"666"**.
- b. Enter your PIN and then press "#".
- c. Select option "9" then "5" and then "0".

2 From the web client:

- a. Go to Settings > Greetings
- b. From here you can set a greeting according to your status.

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To Playback Voicemail

1 By phone:

- a. Dial **"999"** or hit **"Voicemail /Message"** – if 999 is an emergency number dial
- "666".b. Enter your PIN, press "#" and then "*" to play your messages.
- Web Client: Click voicemail. Select the message and click "Play".



Scheduling an Audio/Web Conference

Creating an ad-hoc Web Conference

- 1 Click on **"WebMeeting"** in the web client.
- 2 Click **"Invite People"** in the central navigation bar.
- 3 Now click allow the use of the camera and microphone!





Creating an Audio Conference

From the Web Client, Android & iOS Apps:

- Tap or click on **"Schedule Conference"** (in the top menu for smartphones).
- 2 Add the "Subject" and "Notes".

Specify the preferred time.

- "Enable Announcements" to get notified when participants join.
- 5 Add participants and hit "Create Meeting" (Web Client) or "Done" (Android & iOS).
 - a. Participants will receive an invitation email with an external dial-in number and a PIN.
 - b. Internal participants will receive an email with an extension and PIN or be called.

Learn how to use Conferencing in depth

1. Creating a conference (video & audio) 2. Joining a conference (for external parties)

3. Video conferencing for advanced users