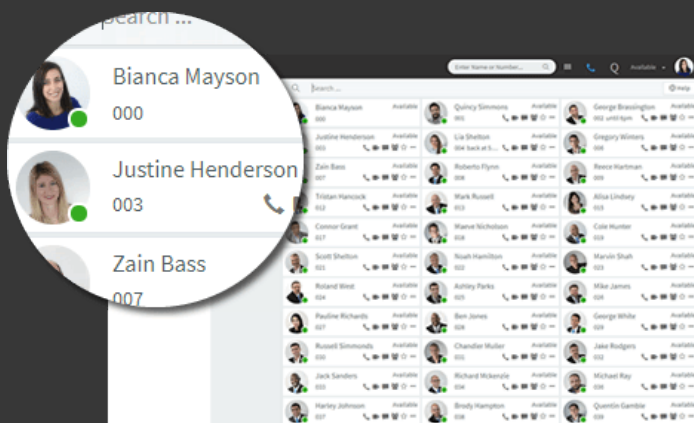


# Your communications Dashboard -The 3CX Web Client

## Logging on

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



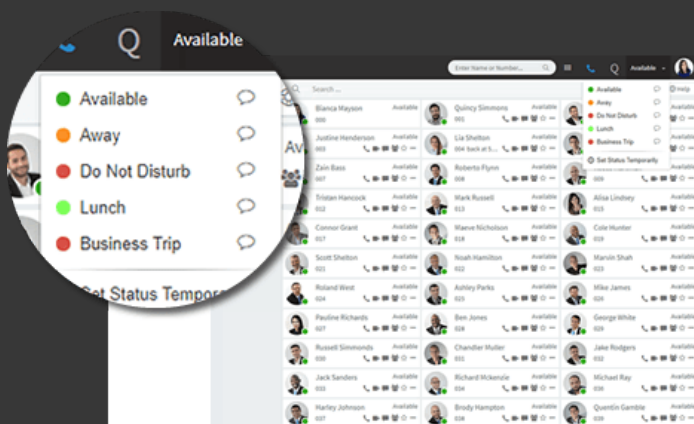
## Make, Receive & Transfer Calls

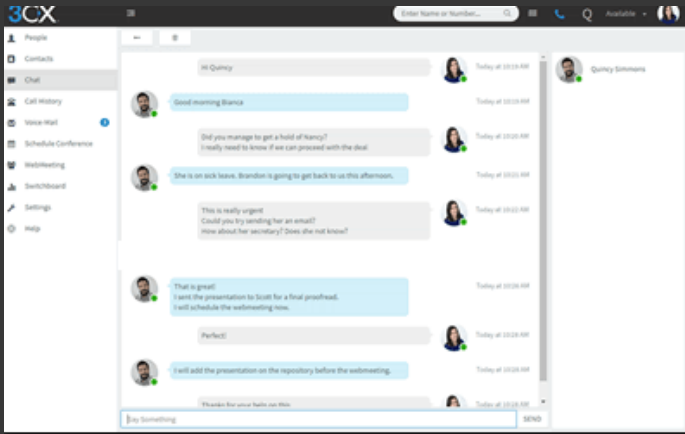
- 1 Make a call by clicking on an extension or enter name/number in the search box.
- 2 Toggle the phone icon to trigger a call on your smartphone, deskphone or web client.
- 3 Transfer a call by clicking “Transfer” or “Att. Transfer”, enter the extension or name.
  - a. To blind transfer click “Transfer” 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.





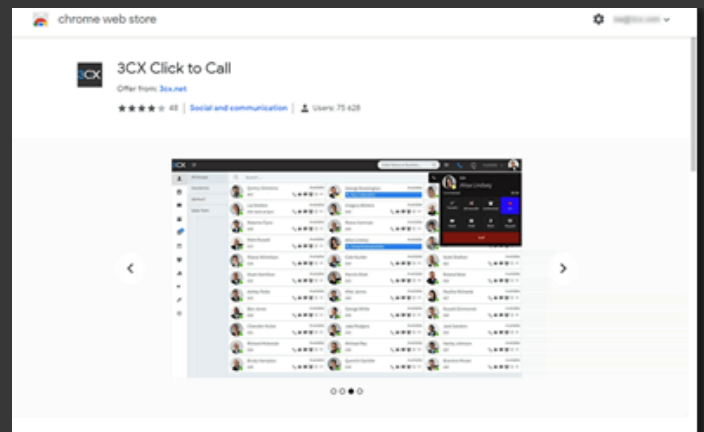
## Chat with your Colleagues

- 1 Click on the “**Chat**” function.
- 2 Click on “**+**” to create a new chat or “**new group**” for group chat.
- 3 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.

[More Click2Call tips here](#)



Check out the [HELP](#) page

Find out what else you can do with your [Web Client](#)

02

# Your Office Anywhere – The 3CX Apps

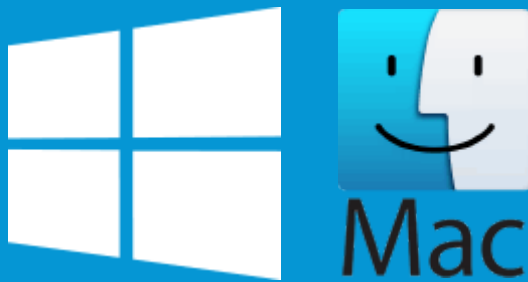
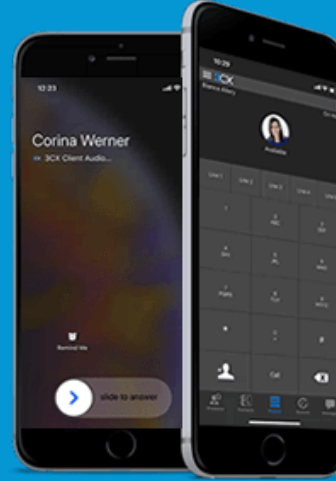
Download the iOS or Android Apps:

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

- ▶ 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:

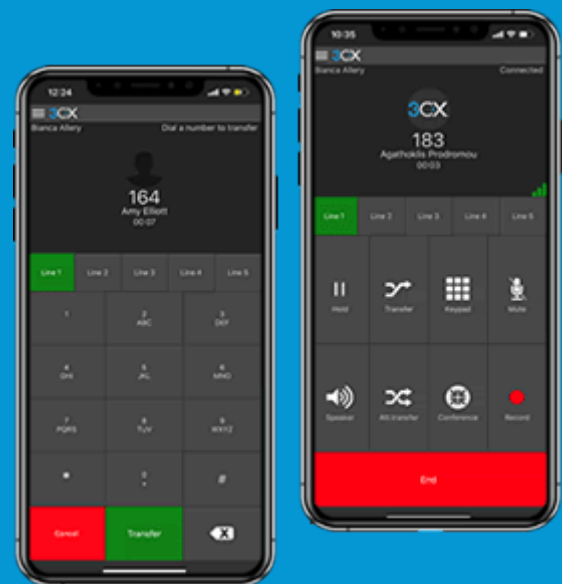
- ▶ Open your welcome email.
- ▶ Download the attachment and double click on it.
- ▶ The app will then automatically configure itself.

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”.

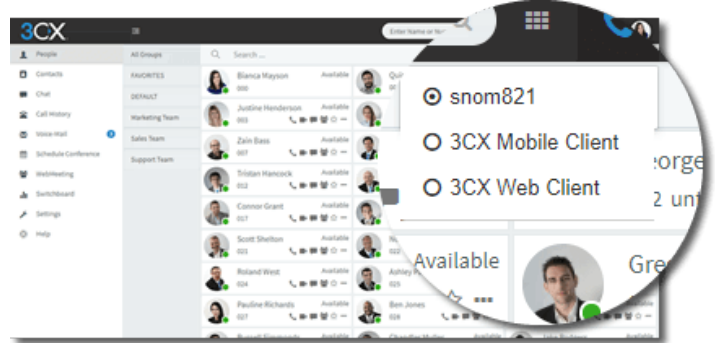


03

# Using your Deskphone

## To make a call:

- 1 Dial the number on the keypad and hit the send or enter button.
- 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.

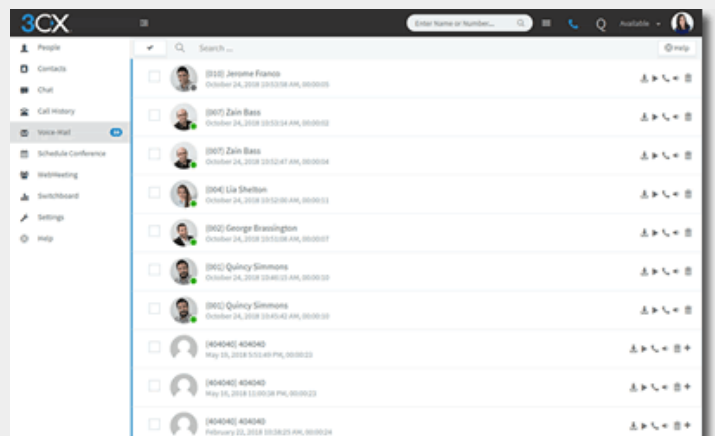
See detailed Transfer,  
Voice Mail & Conference guides for [all IP Phones](#)

04

## Voicemail

### Setting your Voicemail Greeting

- 1 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.





## To Playback Voicemail

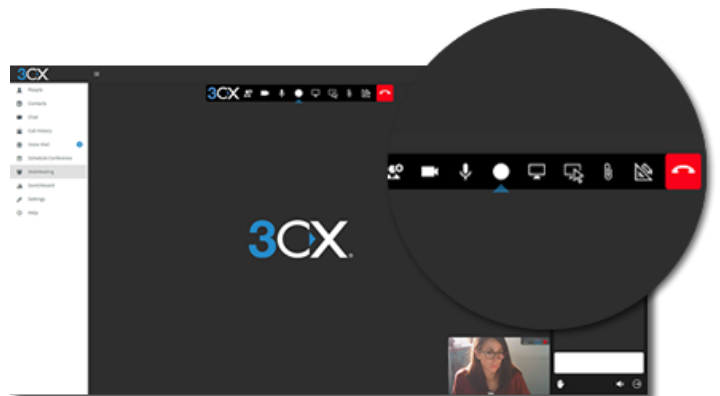
- 1 By phone:
  - a. Dial **“999”** or hit **“Voicemail /Message”**  
– if 999 is an emergency number dial **“666”**.
  - b. Enter your PIN, press **“#”** and then **“\*”** to play your messages.
- 2 **Web Client:** Click voicemail. Select the message and click **“Play”**.
- 3 **Android & iOS App:** Tap on the burger menu and select Voicemail.

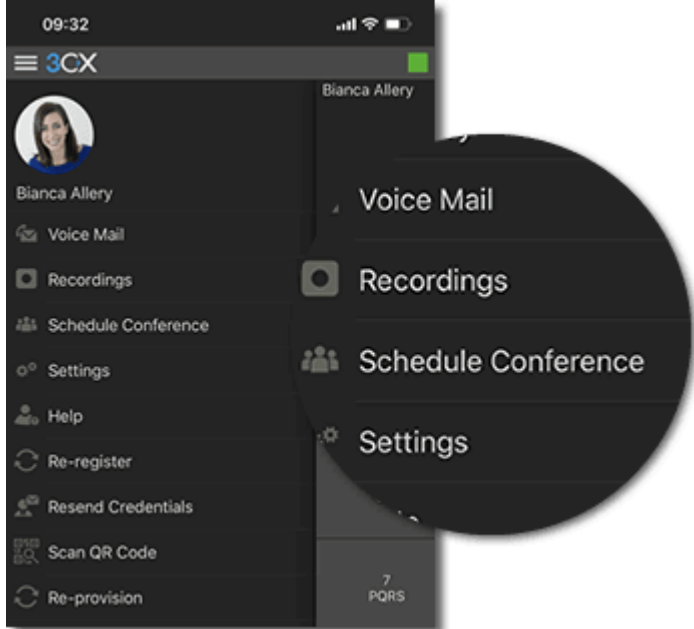
05

# 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:

- 1 Tap or click on “**Schedule Conference**” (in the top menu for smartphones).
- 2 Add the “**Subject**” and “**Notes**”.
- 3 Specify the preferred time.
- 4 “**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](#)