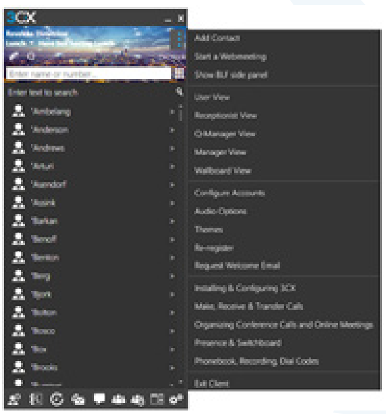
3CX CLIENT FOR WINDOWS QUICK START

Getting Started with the 3cx Client for Windows

The 3CX Client for Windows allows you to manage and oversee telephone calls directly from your computer. The 3CX Client has multiple features and provides the user the ability to namely; launch and transfer calls, SMS/Text and view the availability of colleagues.

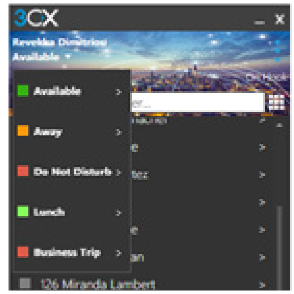
- Softphone Mode (no IP Phone required): Make and receive calls on your computer without the use of a designated IP Phone.
- CTI Mode (an IP Phone is required): Desk phone calls can be managed directly from your desktop using the Client. You can make and receive calls on your desk phone as well as transfer and create conference calls.

The 3CX for Windows' quick menu contains all the necessary shortcuts of the mostly used features.

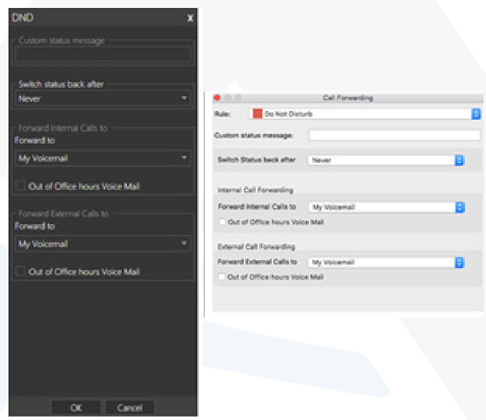


Setting Your Presence Status

The Presence/Status allows you to see the presence of your colleagues, and set you own status and forwarding rules. This feature is very helpful especially if you need to transfer a call to another extension. You can see whether the extension is available, busy or away before making the transfer and you can also benefit from using this feature to set your own status.



1. Click or tap on the status area in the top left corner.
2. From the menu, select your desired status and click on it. On an iOS device press **"Done"** to apply:
   - Available
   - Away
   - Do Not Disturb Lunch – a custom Available status.
   - Business Trip – a custom out of office status.
3. Click on the **">"**. From this screen you can select your status message, when your status should be switched back to the previous status i.e. after one hour, and where your calls should be forwarded to during this time.



The Presence Menu also allows you to interact with other extensions:

1. Click on the **"Presence"** button in the bottom menu.
2. You will see the list with the 3CX Phone System extension groups and their statuses.
3. Select the extension that you want to interact with and double click or tap to call or, click on **">"** to see Contact Details for more actions.

Clicking on the **Settings** icon. In this section, you can set your forwarding rules, audio and video options or even change your theme.

1. Call Forwarding: Configure your forwarding rules.
2. Configure Accounts: IMPORTANT: Do not modify these settings.
3. Recordings: Avoid miscommunication by recording a conversation or conference call and manage your recordings efficiently.
4. Audio Options: From here you can specify your Audio options and devices. Usually the default settings are already optimized, however if amendments are required, they can be done via the Audio Options and Audio Devices tabs.
5. Video Options: From here you can specify your Video preferences and devices.
6. Hot Keys: The Hot Key functionality allows you to use pre-defined keyboard shortcuts for controlling your 3CX Client. How cool would be to be able to answer your phone just by pressing Alt + A on your keyboard.
7. Advanced Settings: From here you are prompted to:
   - Language: Select one of the 15 languages. The application must be restarted for the changes to take effect.
8. Re-register: If your client is having difficulties connecting to your PBX or is not registering, you can select this option to automatically re-provision the 3CX Client.
9. Request Welcome Email: This option is useful in case you cannot find the original Welcome Email and you want to retrieve information such as your voicemail number, PIN or other useful information provided within the e-mail.
10. Exit Client

To Start a Chat

1. Click or tap the **"Chat"** button on the bottom row of icons.
2. Press **"Compose Chat"** or the plus icon.
3. This will bring up your company's extension list. Search or scroll to find the extension that you want to chat with and select it. Click **"OK"** or **"Done"** to launch the chat window. You can also select multiple contacts and have a group chat.
4. Click on the entry field at the bottom of the chat window and start writing your message. Press **"Enter"**, **"Send"** or to send your message.

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Making Calls

You can initiate a call in several ways with the 3CX client:

Client's keypad

1. To access the dial screen on your softphone press the button next to the Search bar.
2. From the dial screen on your smartphone client or softphone enter the number you want to call.
3. Click on the "Call" button to make your call:
   - If you are in CTI mode, the number will be dialed on your IP phone (only for Windows)
   - If you are in Softphone mode, you will have to use your headphones and microphone to make the call.

Phonebook

Click on the **"Contacts"** button in the bottom menu of your client. To make a call to any one of these contacts:

1. Double click, right click or tap on the contact that you want to call.
2. On the contact info screen select **"Call"**

Call History

You were in a meeting, and you have missed a dozen calls. Call history may help you to sort out or prioritize calling back.

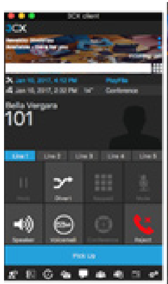
1. Click on the **"Call History"** button on the bottom menu.
2. Find the call entry that you want to call back and double click or tap on the contact.
3. To access Contact Details and select the action press **">"** on PC and Android, otherwise tap on the contact.

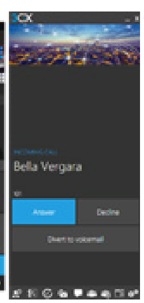
You can refresh or delete the call history by clicking on the buttons at the bottom. You can also delete an entry by accessing the Contact Details.

Receiving Calls

You can receive a call in several ways with the 3CX client:

When you receive a call, the following screen will appear. Click **"Answer"**, **"Decline"** or **"Divert to Voicemail"** accordingly.





Transferring Call

The 3CX client allows you to seamlessly transfer calls to other users. There are two ways to transfer calls:

Blind Transfer

1. While in a call, click on the **"Transfer"** button .
2. You can select a contact by:
   - Typing or tapping the number or the name of the contact you want to transfer the call to.
   - Press the Phonebook, Presence, or Call History tabs and select the desired contact.

3. Click on the **"Transfer"** button to transfer the call. The call will be transferred as soon as the recipient accepts the call or you press **"End."**

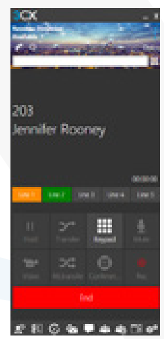
Attended Transfer

While in a call, click the **"Att. Transfer"** button.

1. Dial the number or name you want to transfer the call to, or select a contact from Presence, Phonebook or Call History, click the **"Call"** button and announce the caller waiting on the line. The line on hold will be marked as orange while the active line is marked in green.
2. After confirming that the recipient wants to take the call, click the **"Transfer"** button , hang up, and the call will be transferred to the recipient.

Other Features Drag and Drop

This feature is a great help, especially for receptionists. In the Receptionist view, you can transfer a call just by using drag and drop.



Using the BLF

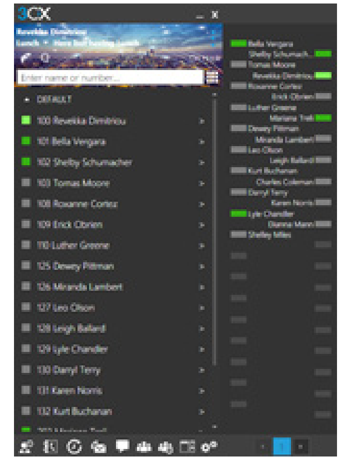
The 3CX client works just like the BLF (Busy Lamp Field) panel on your IP phone, a small light tells you whether an extension is busy or not and allows you to easily interact with these contacts. Think of it as your favorite and most-used extensions list.

To enable the BLF Panel on the Windows client press the Quick Menu on the notifications screen and select **"Show BLF side panel"**.

- Making calls just by pressing the desired contact.
- Transferring calls from when it is still ringing or after you have answered the call by pressing the desired contact.

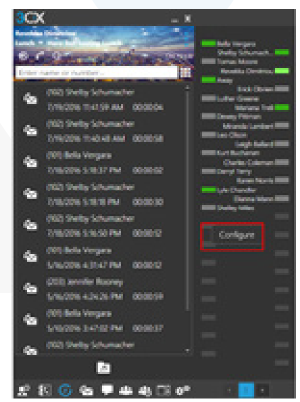
Note: With the BLF panel you can only make Blind transfers. You can configure the BLF panel by:

1. Right-clicking on the desired button and then selecting **"Configure"**.
2. In the 3CX window you will see the **"BLF Settings".**
3. Choose the type of BLF you want.
4. Select the desired extension



Options for BLF

- BLF - shows presence of another extension.
- Speed Dial - link to a phone number for easy calling.
- Custom Speed Dial.
- Shared parking
- Agent Login /Logout.- (Not Used)
- Change status.



To Submit Phone Issues: **Support@thearcehouse.com** **Text Support - 551-404-5056**

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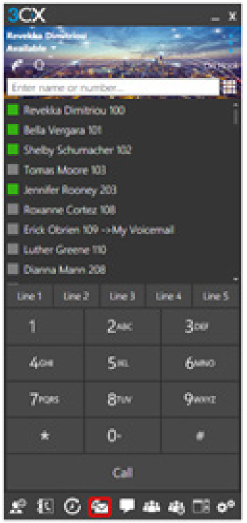
Customizing your Voicemail Greetings

The 3CX clients for Windows, give you the option to create personalized voicemail greetings for all of your statuses.

*The system's Default Message for each profile status.



- Click on the folder button to go to the "Set Voicemail Greetings" tab.

There are 2 options for setting your personalized greeting: "Record Greeting" or **"Browse"** an existing recording.

Recording a Personalized Greeting

In the **"Set Voicemail Greetings"** tab, click the "Record Greeting" button .

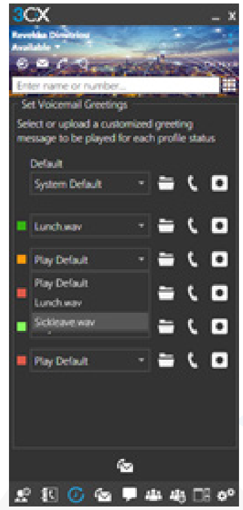
You will then be prompted to a screen advising you to enter a filename for the voicemail greeting message and the procedure you need to follow.

- Click **"OK"** after entering the filename.

You will receive a call from Caller ID **"RecordFile"**. Answer the call and follow the in-call instructions. When the call ends you will be returned to the dialpad; from here you need to access the **"Set Voicemail Greetings".**

The recorded message will be available for all statuses.

Select the status that you wish to set the recorded message for by clicking on the field next to the status.



- Click the **"Voicemails"** button to save your changes and return to the voicemail list.

To record another custom greeting follow the same procedure.

Setting a Pre-recorded Message as your Voicemail Greeting

To browse and set a pre-recorded greeting follow the procedure below:

1. While on the **"Set Voicemail Greetings"** tab, click the folder button .
2. Browse to select the .WAV file that you wish to use and click **"Open."**
   The file will now be selected for that status.
3. Click the **"Voicemails"** button to save your changes and return to the voicemail list.

Tips: You can hear your greetings before saving them by pressing the button for. A call from **"Playfile"** will be directed to your extension.

Note: If any status is left to the **"Play Default"** option, and the **"Default"** field has been set to a custom message, then that greeting will be used whether that is the system default greeting or a personalized message.

Presence/Status

The Presence/Status allows you to see the presence of your colleagues, and set you own status and forwarding rules.

This feature is very helpful especially if you need to transfer a call to another extension. You can see whether the extension is available, busy or away before making the transfer and you can also benefit from using this feature to set your own status.

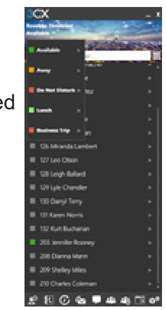
Seeing the Presence/Status of your Colleagues

Presence allows you to check the status of an extension so that you are aware of who is busy, who is available and who is away. Being able to instantly see the status of each employee means that you can handle the call faster, easier and more efficiently. The presence menu also allows you to interact with other extensions:

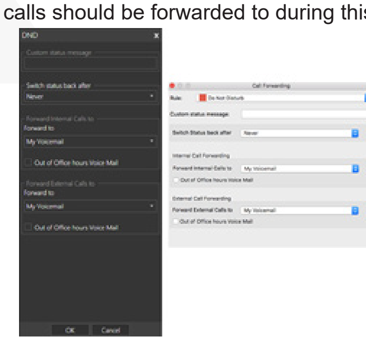
1. Click on the **"Presence"** button in the bottom menu.
2. You will see the list with the 3CX Phone System extension groups and their statuses.
3. Select the extension that you want to interact with and double click or tap to call or, click on ">" to see Contact Details for more actions.

Setting Your Presence Status

1. Click or tap on the status area in the top left corner.
2. From the menu, select your desired status and click on it.
   - Available
   - Away
   - Do Not Disturb
   - Lunch
   - Business



3. Click on the ">". From this screen you can select your
4. status message, when your status should be switched back to the previous status i.e. after one hour, and where your calls should be forwarded to during this time.



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Video Conference Overview

With the 3CX client you can easily create, schedule, manage, and join ad-hoc conference calls (conference calls that initiate immediately without scheduling), web meetings or even webinars from your computer.

Note: If you are unable to organize a 3CX Web Meeting, contact your administrator to enable this option for your extension.

Creating an Ad-Hoc Video Conference

With the 3CX Client you have the ability to create ad-hoc video conferences in the form of Web Meeting or Webinar:

Click on the "Conference" button and "Create Conference."

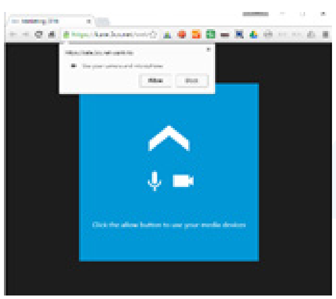
Select the (Video)

Fill in the "**Subject**" of the conference call and add "**Notes**" if needed.

Enter the Email, Number in the appropriate box. You can also add participants from the phonebook by clicking on the button. Select the desired contacts from the list, by click the checkbox next to their name, or by using the Search.

Click **"Start Now"** to start the conference. This automatically opens up your browser.

Note: If this is the first time you are using the web conferencing feature then you will receive the below message. Allow the use of the camera and microphone in order to proceed.



Create a Scheduled Video Conference

Click on the **"Conference"** button and press **"Create Conference.**"

Select the (Video)

Fill in the "**Subject**" of the conference call and add **"Notes"** if needed.

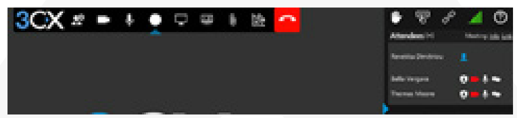
Enter the Email, Number in the appropriate box. You can also add participants from the phonebook by clicking on the button. Select the desired contacts from the list, by clicking the checkbox next to their name, or by using the Search.

Press **"Schedule"** and fill in the Start Date, Time and Duration.

Click the **"Schedule"** button. All participants will receive an email with the web meeting url they need to use to access your conference.

Note: To "Edit" or "Delete" a conference go to "Conference" -> "View Conferences."

Add More Participants to an Ongoing Conference



From within your browser you can start inviting participants. You can do this in the following ways:
Click the icon.

Press the **"plus"** icon next to Attendees.

For these 2 methods, a window will appear asking you to add participants by providing the name and email. Then click on the **"Add"** button. Once all participants have been added to the list click on the **"OK"** button. An email will be automatically sent to all participants with the link to enter the web meeting.

Additionally, you can click on the icon or the **"Link"** next to the **"Meeting Info"** in the top right corner of your browser and the meeting link will be automatically copied to your clipboard. You can then send the link to other participants.

Note: Participants entering an ongoing conference will unable to see previous comments.

Whiteboard

The Whiteboard feature is an ideal tool for brainstorming sessions, business presentations or online classrooms.
To use the Whiteboard:

1. While in meeting, click the **"Whiteboard"** button.
2. Choose the template you want to use **"Blank"** or **"Dotted Grid".**
3. At the bottom of the screen you may select between the following:
   - Brush
   - Eraser
   - Text Box
   - Color
   - Line thickness
   - Clear
   - Window layout
4. To stop sharing the document press the **"Stop Sharing"** button as shown above.

Important: Objects drawn on the Whiteboard are not shown in meeting recordings.

Share PDF

When in a meeting, notes, reports and presentations are often required. Being able to share those documents on the spot is essential for the video conference to run smoothly. Losing or misplacing a document is a common issue. With 3CX WebMeeting you can share PDFs and more with just a few clicks. You may upload it at the time or have them ready in your Repository. You are also able to highlight areas with the tool box on the bottom of the page.

To share a PDF document:

1. While in meeting, click the **"Share PDF"** button.
2. A new window **"Shared Documents Repository"** will open from where you can **"Upload," "Preview,""Delete"** and **"Share."**
3. All the uploads are saved automatically in the **"Shared Documents Repository."**
4. Once sharing has been established you will see the document on your screen and you will be able to interact with the tools shown below:
5. To stop sharing the document press the **"Stop Sharing"** button as shown above.

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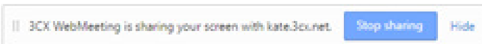
Screen Sharing

This feature is extremely helpful when conducting a product presentation or collaborating with colleagues. You can share your whole screen, including IM and e-mail notifications, or a single window or application which will only show what takes place in that window.

To share your screen press the **"Start Screen Sharing"** button. A new window will open with all the available screens you can share. Once you share your screen the following message will appear at the bottom of your monitor:



To stop the screen sharing you click **"Stop Sharing"** button from the above message.

Recording

You can create a recording that can be shared with the participants or even with those that were unable to join you at the time. Webinars for example, can be recorded and made available for people who were not able to attend the live sessions.

To start and finish the recording you have to press the button. For as long as the icon is red the recording is ongoing. Once the participants exit the meeting, the organizer will receive a report e-mail with the download link to the mp4 recording. The recordings are available for 7 days. After that they are automatically deleted.