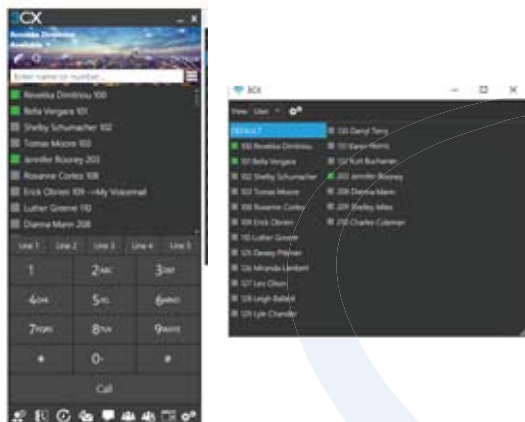


3CX SWITCHBOARD USER GUIDE

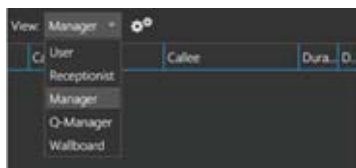
The 3CX client includes a switchboard function that can be tailored to the way you want to manage your phone calls. The Switchboard feature provides users the ability to access most if not all extensions in one common area and view the availability of respective users within the organization.

You can access the 3CX Switchboard by clicking on the “Switchboard” button on your 3CX Client, as displayed below, or by choosing one of the Switchboard views from the Quick Menu on the Windows Client.



Different Views:

- User - This view is used for to quickly and easily see the status of colleagues.
- Receptionist - For operators that need efficient and fast answering & transferring of calls.
- Manager - To monitor staff, incoming calls & queues.



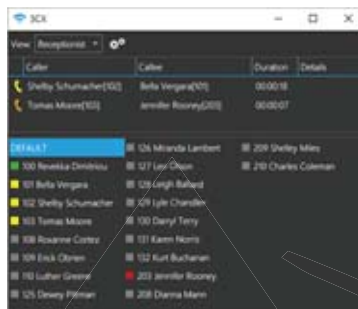
User

This is the default view and allows you to quickly see the status of your colleagues. This way you can see whether an extension is available or not before making a transfer. In order to proceed with a transfer just click the extension on the presence screen, if available. You can interact further with the extensions; right click and from the drop down menu you can make a call, leave voicemail, intercom, conference, or chat.

Receptionist

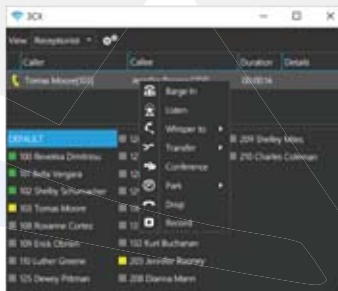
The Receptionist view allows you to monitor ongoing calls at any time. This way you can immediately determine who is busy in a call, the caller and caller details, and the duration of the call without having to search in the presence screen.

Managing Incoming Calls



1. In your presence screen you can see all the incoming calls marked in orange.
2. You can pick up, divert or drop a call by right-clicking on the call and selecting the desired option.
3. You can transfer calls to other colleagues by dragging this call and dropping it on the desired user.

Managing Answered Calls



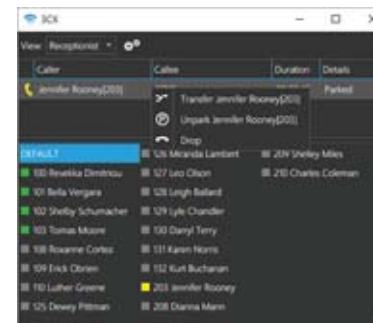
You can also manage calls even when the call is answered by the recipient.

Right click on the ongoing call for the list of the following options to appear:

- Transfer
- Conference
- Park / Hold (SP##)
- Drop

Parked Calls / Hold (SP##)

(SP##) Shared Parked calls are calls that have been put on hold so that another user can also pick them up. You can park a call by right-clicking on the selected call through the Receptionist view. You can transfer, unpark or drop a parked call by right clicking on the call and choosing the required action from the drop down menu.



Transferring Calls

You can transfer calls in two ways:

- By selecting the call, right clicking and choosing transfer.
- By dragging the call from the top window onto the person you want to transfer the call to.

Drag and Drop (Windows)

With the “Drag and Drop” feature, you can perform both “Blind” and “Attended” transfers. There is only one default transfer method which can be set from “Settings > Advanced Settings > Behavior” “Transfers using drag and drop” section. In order to use the other mode, you have to press the Ctrl button on your keyboard whilst dragging the call.

- Blind Transfer - The call will be transferred immediately to the recipient without any announcement. If the recipient doesn't answer or is busy then the call will be returned to you and you can choose to take a different action.
- Attended transfer - The caller will be put on hold and you will call the recipient to announce the caller. To execute transfer click on the “Transfer” button. This mode is available only for calls carried out by you. In order to make an “Attended Transfer” to a call between two other people, you will have to first take the call and then proceed.

Manager View

The Manager view allows you to view and manage calls as well as monitor queues.

