Your 3CX Handbook



Web Client Guide

Section 1



Android App Guide

Section 2



SIP Trunk

Section 3

support@vanillacloud.co.uk

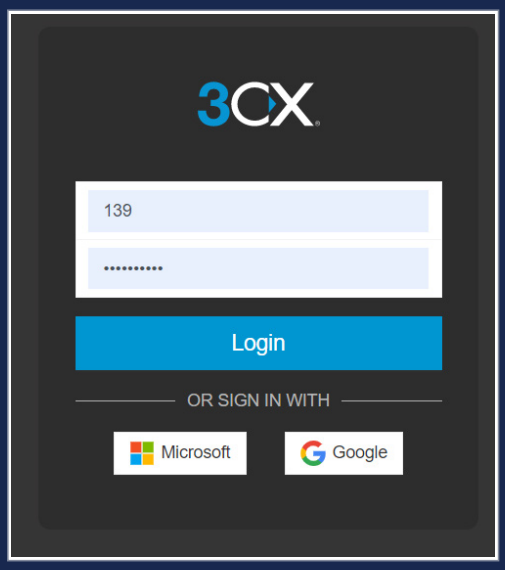
0207 952 2577

3CX Web Client Guide

Introduction

The 3CX Web Client is a browser-based app. It combines all the features you need to easily and efficiently communicate, collaborate and connect with colleagues, partners, and customers. From this one interface, you can manage calls, view the status of colleagues, hold a video conference, and connect via voice, live chat, WhatsApp, Facebook, and SMS/MMS.

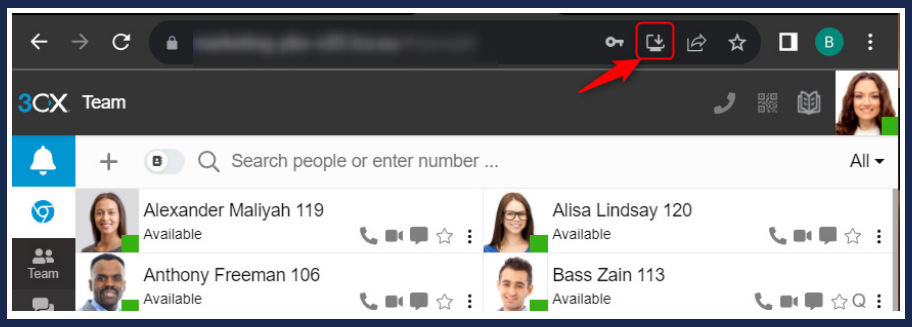
Get Started: Logging On



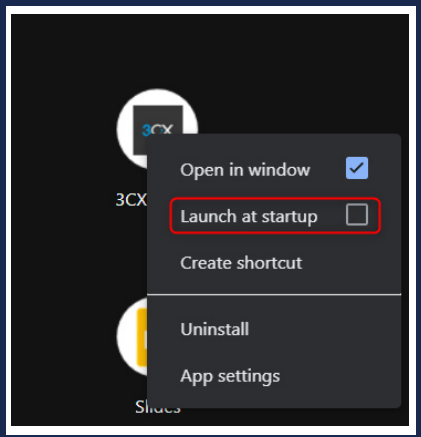
- Open your “Welcome to 3CX | Your Account Details” email.
- If your admin has enabled SSO for Google Or Microsoft, sign in with those credentials.
- If not, click on the "Set your Password" link specified in your email and set your password.
- Log in using your email or extension number and your newly set password.
-

Note: Your System Admin can enable 2 Factor Authentication for extensions in the Admin Console from "Admin → Users → Edit User → General".

Install the Web Client as an App (PWA) - Google Chrome

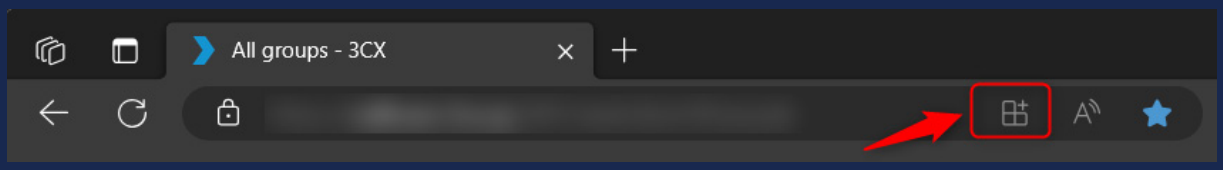


- Click on the download icon in your browser's address bar as shown above.
- A new dialog will open; click on the *Install* button.
- You will be asked if you would like to pin 3CX (PWA) to your taskbar; we suggest clicking on *Yes* for easier access.
- The Web Client as a PWA app is now installed.

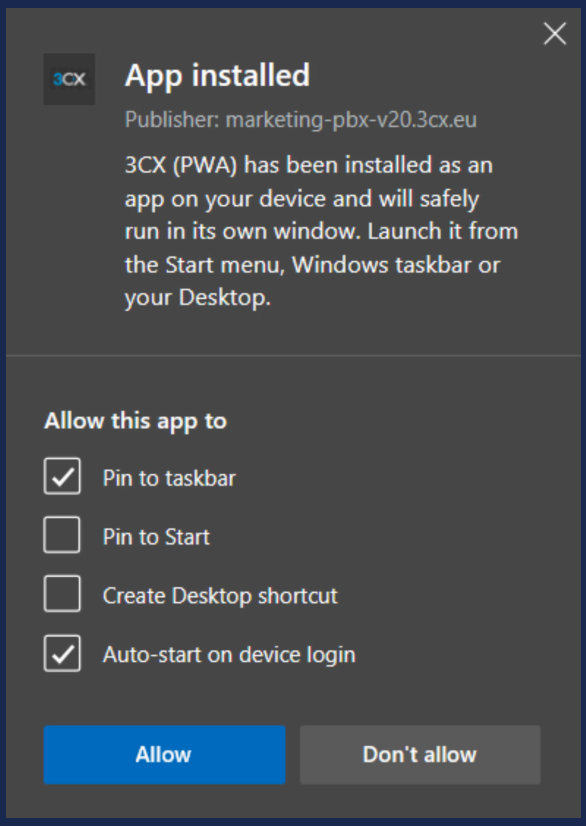


- Enable the app to launch at startup; type "chrome://apps" into the address bar, right-click on *3CX* and enable the *Launch at Startup* checkbox.

Install the Web Client as an App (PWA) - Microsoft Edge



- Login to your web client.
- Click on the icon highlighted above in your address bar.
- Click *Install*.



- In the *App Installed* dialog:

- enable the *Pin to taskbar* option
- enable the *Auto-start on device login* option
- click the *Allow* button

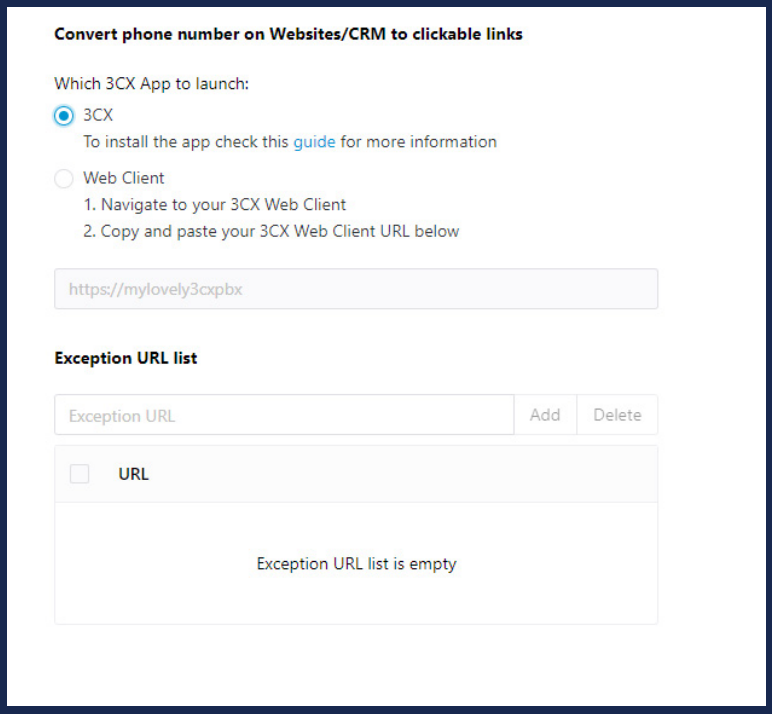
- Installation is complete

Click2Call Browser Extension

The 3CX Click2Call Browser extensions for Google Chrome and Microsoft Edge enable you to initiate calls from any website or CRM system. Phone numbers appear “hyperlinked”, for you to simply click on and ‘send’ the number to the 3CX Web Client or Softphone to place the call.

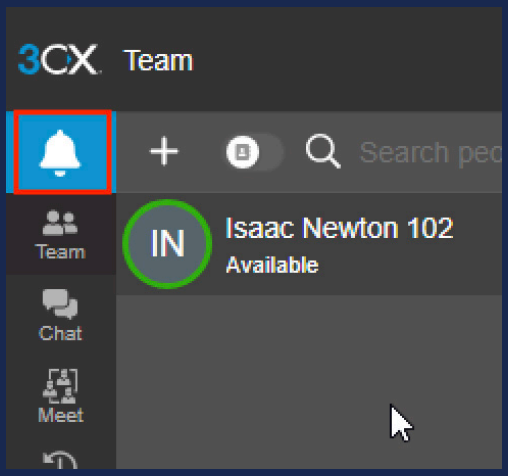
Installing the Browser Extension

- Install the Google Chrome extension.
- Install the Microsoft Edge extension.
- Follow the installation steps.



- Once installed the above dialog will appear; choose which 3CX app you prefer the browser extension to use to initiate calls: the Softphone or the Web Client.
- In the Exception URL list field, you can add specific website URLs that should not have their numbers “hyperlinked”; for example, you can exclude a website with accounting information, to prevent it from creating clickable numbers.

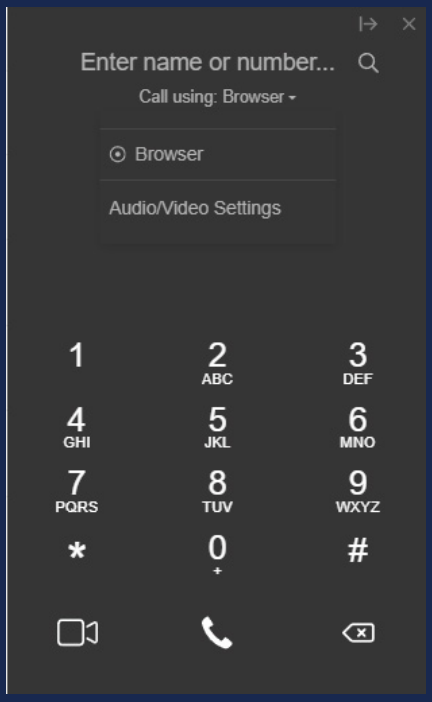
Manage Notifications for Calls and Chats



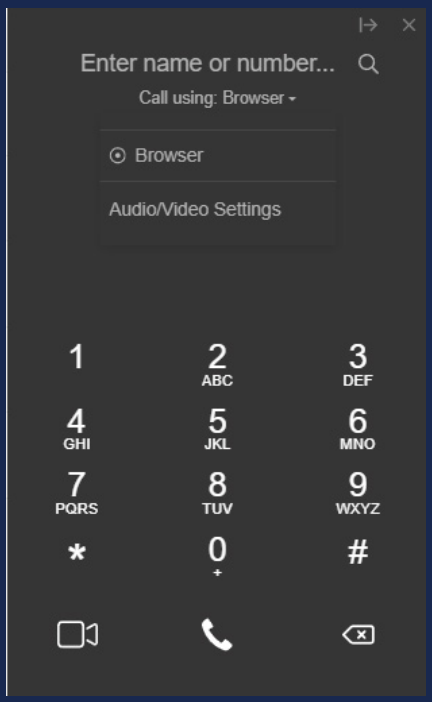
- You can click the *Bell* icon to receive notifications for incoming chats and calls.

Making & Managing Calls

- To place a call, click on the dialer icon in the top right corner of your web client.
- Enter the phone number or search by name, extension number or email address, then click the handset icon to start the call.



- Beneath the search bar you will see an option *Call using: Browser*; click on the arrow and a dropdown will appear with available devices/apps for you to use to place calls.

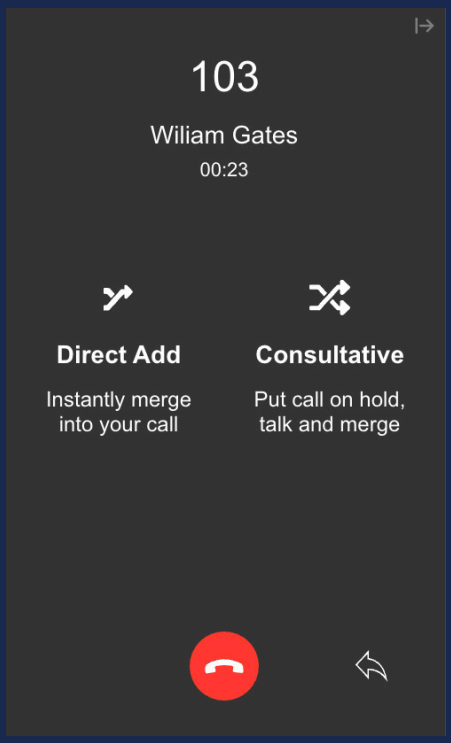


Making & Managing Calls

- During a call, you can perform a number of actions:
- *Transfer a call* - Click on *Transfer* and enter the name or number of the person you want to transfer the call to
- *Attended Transfer* - Click on *Att.transfer* to announce the call to the receiver before transferring the call; the call will be put on hold
- *Record a call* - Click on the *Record* button at any point during your call to start recording. Click again to end the recording; recordings can be accessed in the Web Client (if you have the necessary permissions).
- *Initiate a new call* - Start a new call on a separate line without hanging up the current call. To do this, click *New Call* and enter the name or number of the callee.
- *Switch to video* - Switch your current audio call to a *video* call by clicking the Video icon in the dialpad.
- *Start a conference call*

Conference Calls

If you are on a call with someone, you can easily conference others into the call.

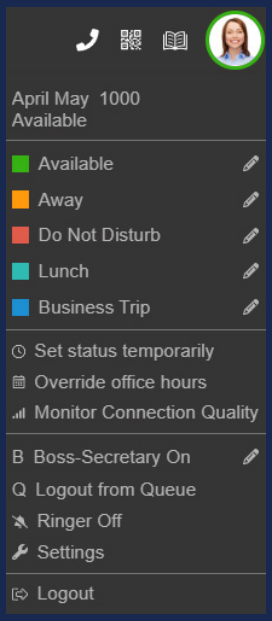


You can add another party directly to the call.

Another option is do this in consultative fashion, where the call is put on hold, and the web client will connect you to the new party; after discussing with the new party, you can choose to add the new party to the conference, or to drop the new party and resume the call.

Manage your Status & Queues and Boss-Secretary state

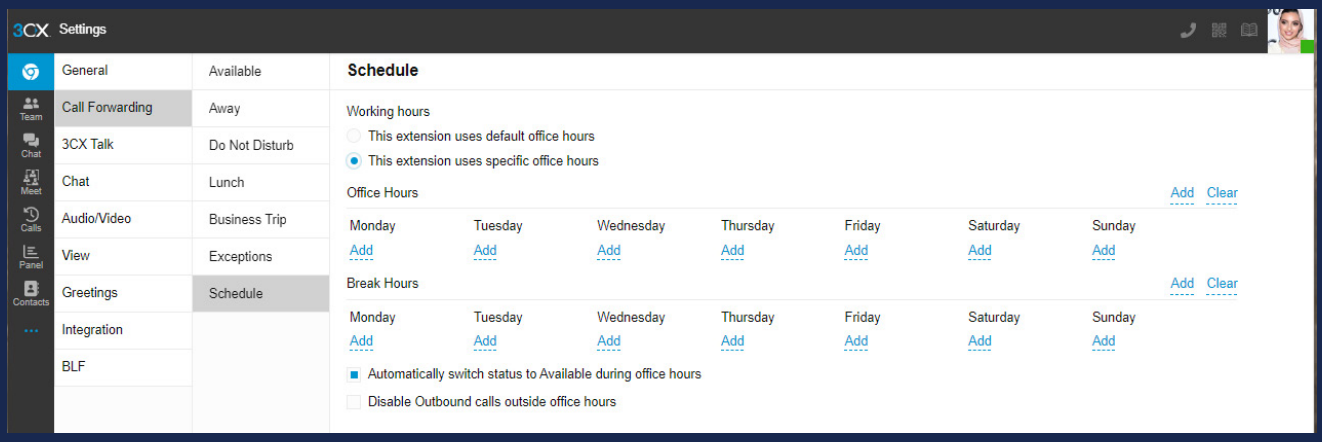
The Status feature allows you to see which colleagues are available to take calls. Avoid distractions and set your own status to let others know when you're away or you don't want to be disturbed. If Boss-Secretary is enabled for your account, you can also set that to Active/Inactive.



- Click on your avatar in the top right corner and select your status from the dropdown.
- Your status color changes automatically to yellow when your line is busy.
- Use the pencil icon to set a custom status message.
- Time-limit your status by clicking on the *Set status temporarily* option.
- Click on "*Settings* → *Call Forwarding*"; from here you can customize each status and also:
- Enable/disable push notifications for each status
- Rename *Lunch* and *Business Trip* statuses
- Set the number of seconds before an unanswered call is forwarded for your *Available* and *Lunch* statuses
- Set forwarding rules for unanswered calls
- From the *Exceptions* option you are able to override forwarding rules based on Caller ID and time of the call
- Set your office and break hours

Manage your Status & Queues and Boss-Secretary state

Auto switch status based on your working hours

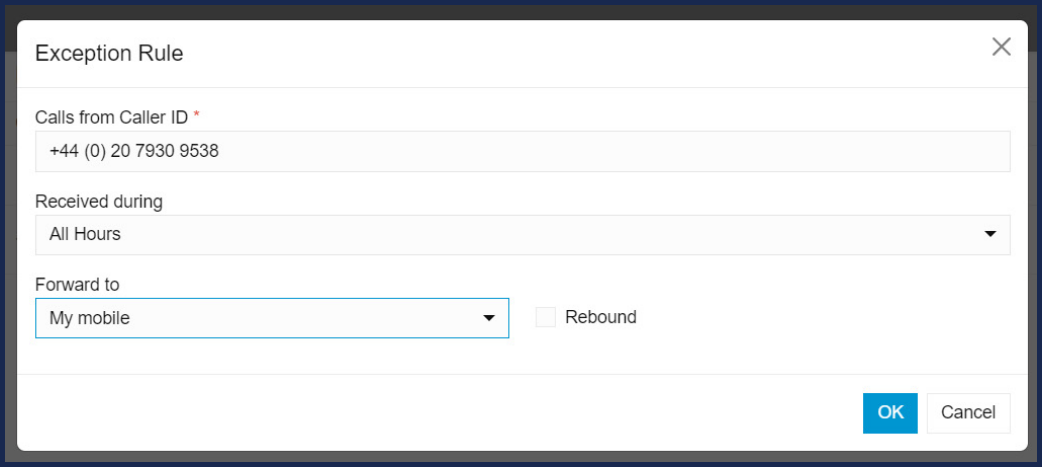


You can configure automatic status switching based on your office hours from "*Settings → Call Forwarding → Switch Status*". Choose whether your extension should use regular office hours or add your own; your extension will then follow these hours and automatically change your status accordingly.

Add Caller ID Exceptions to your working hours

You can add caller ID exceptions to your working hours. This allows you to, for example, always accept a call from someone regardless of your working hours or never accept a call and send the caller straight to voicemail.

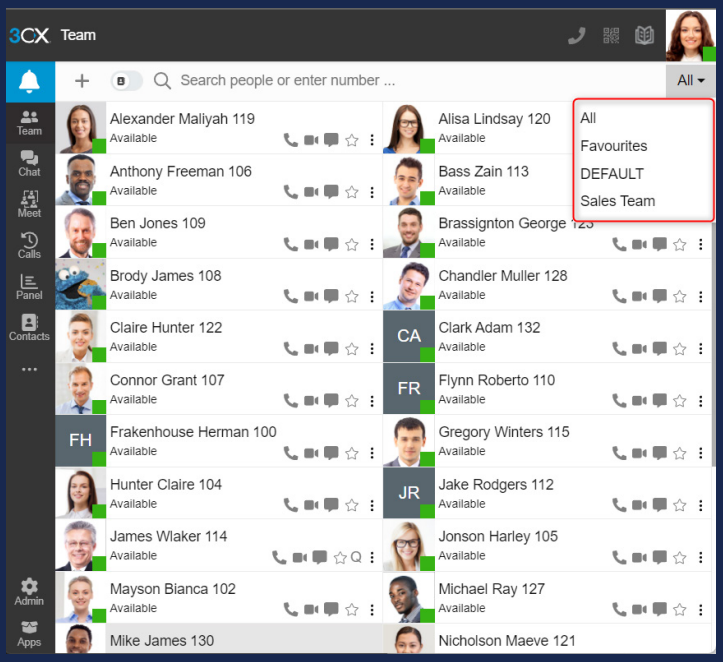
Go to "*Settings → Call Forwarding → Exceptions*"
Click on the + button to add a new exception.



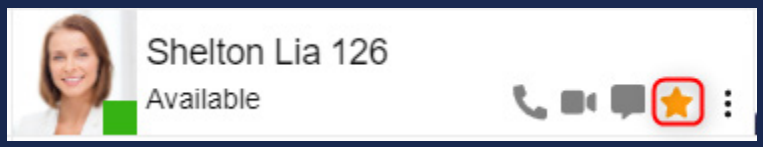
Manage your Status & Queues and Boss-Secretary state

- Enter the caller ID you want to create an exception for.
- From the *Received During* drop-down, choose which hours this exception is valid for.
- From the *Forward To* dropdown, select where to forward calls to from your specified caller during your chosen hours; if you enable the *Rebound* checkbox, any forwarded exception calls that are not picked up by the forwarding destination will be automatically redirected to the extension that originally received it.
- Click the *OK* button to save the exception.

Team View - Departments & Groups



- By default, the *Team View* shows all the members of the groups you are part of; you can choose a different view from the drop down list.



- Add colleagues to your *Favourites* by clicking the star icon next to their name.



- The contacts toggle in the top left corner allows you to show your personal contacts also; they will be listed after your colleagues.

Chat with Colleagues and Customers

Send and receive instant messages with colleagues, live chat with website visitors, WhatsApp and Facebook, and receive SMS/MMS messages from customers. Access all chat functions from the "*Web Client → Chat*" option in the left-side menu.

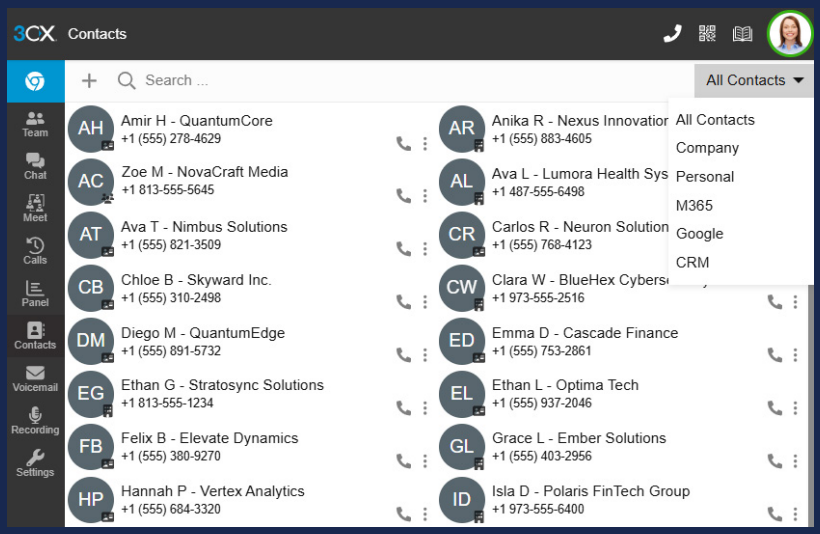
Quick response chat templates can be created and edited by group managers. They allow users to respond with predefined messages, making response times quicker. Templates can be organized into different categories and languages.

Learn more about composing chats and SMS, and the various chat functions available in the business chat manual.

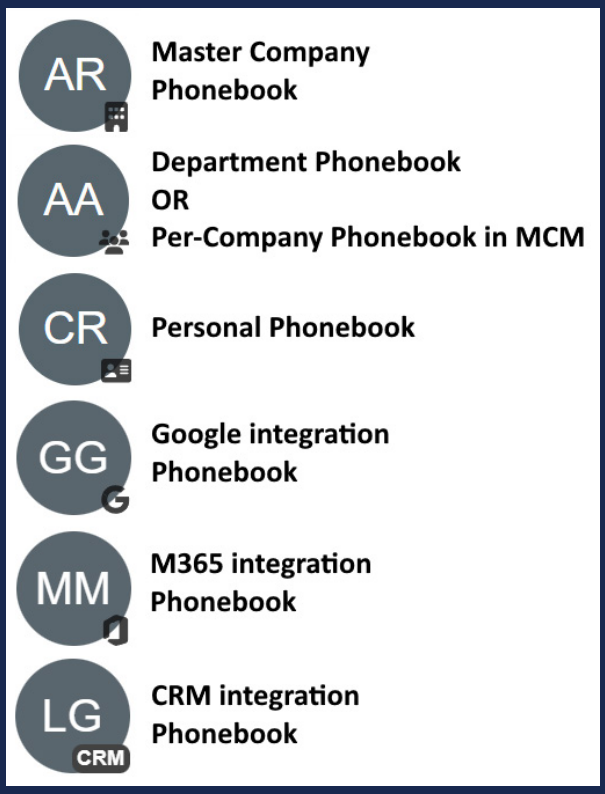
Start a Video Conference

Start a video conference or schedule a conference by clicking on the *Meet* option in the left-hand menu of your Web Client. Find out more about video conferencing and its features in the Video Conferencing manual.

Manage Your Contacts



Use the *Contacts* tab to manage (edit, add, delete) and call your contacts. The Contacts view provides a searchable list of all your contacts, or you can use the dropdown on the right to limit the view based on which Phonebook the contact is from - Company, Department, Personal, M365, Google or CRM. You can quickly check which Phonebook a contact belongs to by the identifying badge on the contact icon.



Using Your 3CX Android App

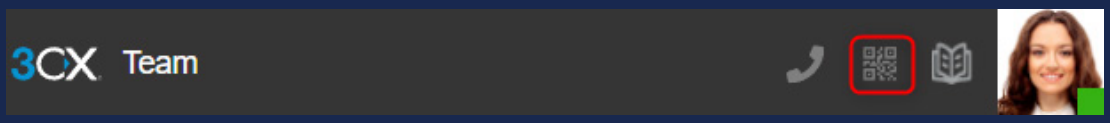
Introduction

The 3CX app for Android allows you to seamlessly take your business communications and contacts with you wherever you go. Access the company phonebook, manage calls, answer chats and respond to all kinds of messages - from the palm of your hand. There's no need to use your personal mobile number for business calls anymore.

Step 1: Install the Android app

Install the Android app from the Google Play Store.
Open the app, read and accept the license agreement and authorize the permissions the app needs (camera, microphone).

Step 2: Configure your Extension: Scan the QR code



1. Open your web client and click on the QR code in the top right corner.
2. Open your camera on your Android device and scan the QR code shown on your screen.
3. Grant all the necessary permissions in the next screens.
4. Make sure to follow the battery optimization instructions for the app to work efficiently.
5. Your extension is configured and you're now "*Ready for calls*"!

Making a Call

Making a call with the Android app is quick and easy. You can either dial a number in your keypad and hit the call button or search for a contact from your “Contacts”. Search by name, number or email, and then tap on the phone icon next to the contact.

Once you’re in a call, you can seamlessly perform a number of actions, including:

1. “Transfer” will give you the option to “Blind” without the need for you to speak to the receiver, or “Attended” will transfer the call after you first speak to the receiver to see if they accept the call and press “Join”.
2. “Conference” allows you to create an ad hoc conference call, adding more participants to join the conversation.
3. “Rec” allows you to record your conversation.
4. “Video” adds video to your call for face to face communication.

Use Google Assistant to Make Calls

Ask Google to make a call using 3CX, be it by name e.g. “OK Google, call James using 3CX” or by number e.g. “OK Google, call 101 using 3CX”. When calling by name, the Google Assistant will try to find a person in your device’s contacts, to pass on to the 3CX App.

- If only one contact is found with one number, the call is initiated immediately.
- If the contact has multiple numbers, the 3CX App will open the contact card for you to choose the number to call.
- In the case of several people with the same name, the 3CX App will filter all contacts by name for you to choose the correct contact.

To set up:

- Enable Google Assistant on your device.
- Ensure both the device and Google assistant region are set to “English (US)”.
- Install the 3CX App with an active account.

Schedule a Video or Audio Conference

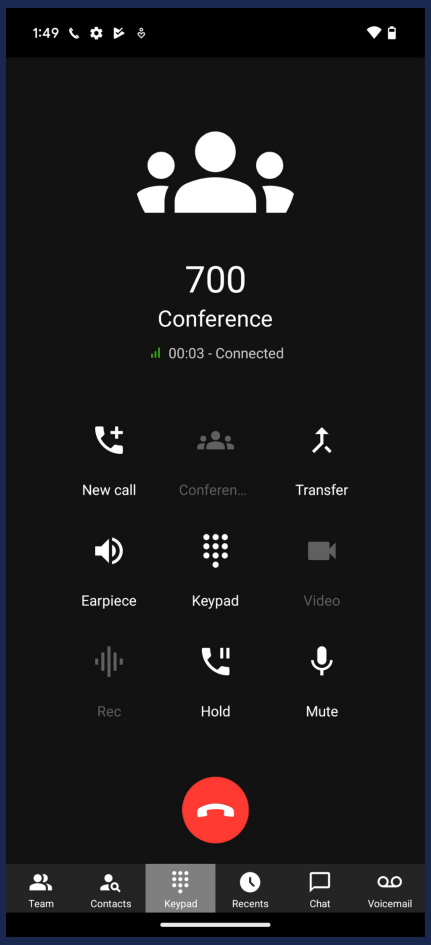
Create a video or call conference in seconds with the Android App:

1. Tap on the menu app menu button button in the top left corner and select "*Schedule*".
2. Add your Subject then choose a date and time to schedule your conference.
3. If you are creating an audio conference you will see a "*PIN*"
4. If you are creating a video conference then you have to enable the "*Video*" option.
5. Choose whether you want to create a calendar event and proceed to "*Add 3CX Contacts*". When you're done adding contacts tap on the arrow in the bottom right hand corner.
6. Tap on the arrow in the bottom right hand corner and a new calendar entry will open. Make any necessary changes and click on "*Save*".

Note:

- Once the conference is created you cannot alter the participants.
- To join a video conferencing from your Android smartphone you will need to have the 3CX Video Conference App installed.

Schedule a Video or Audio Conference

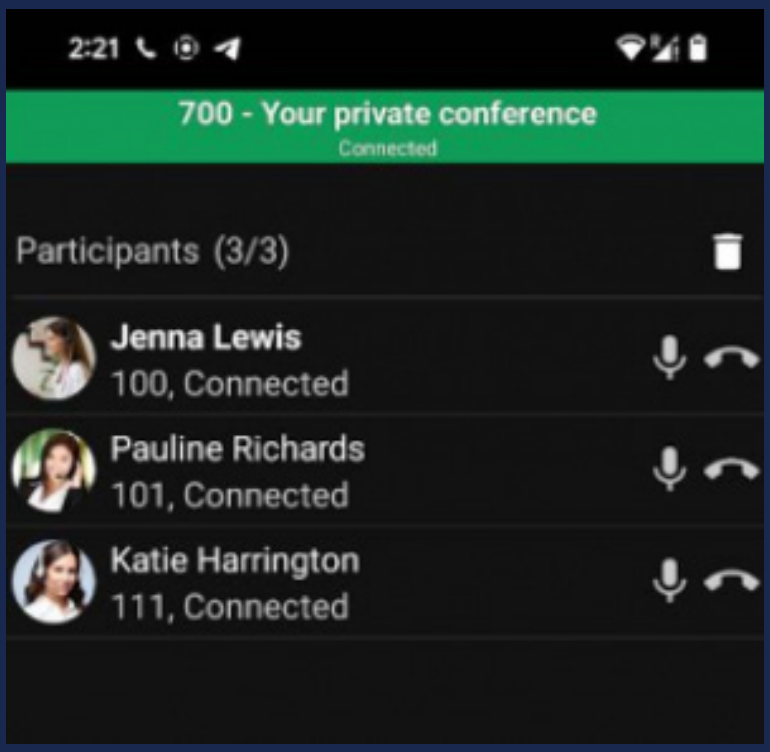


Easily add more participants to an ongoing call:

1. **Click the "*Conference*" button on the dialpad.**
2. **Search for who you want to add to the call by name or extension, or enter their phone number.**
3. **Tap to call. They will be automatically dialed and upon answering they will be added to your call.**

See our Video Conferencing chapter on how to create a video conference from your smartphone.

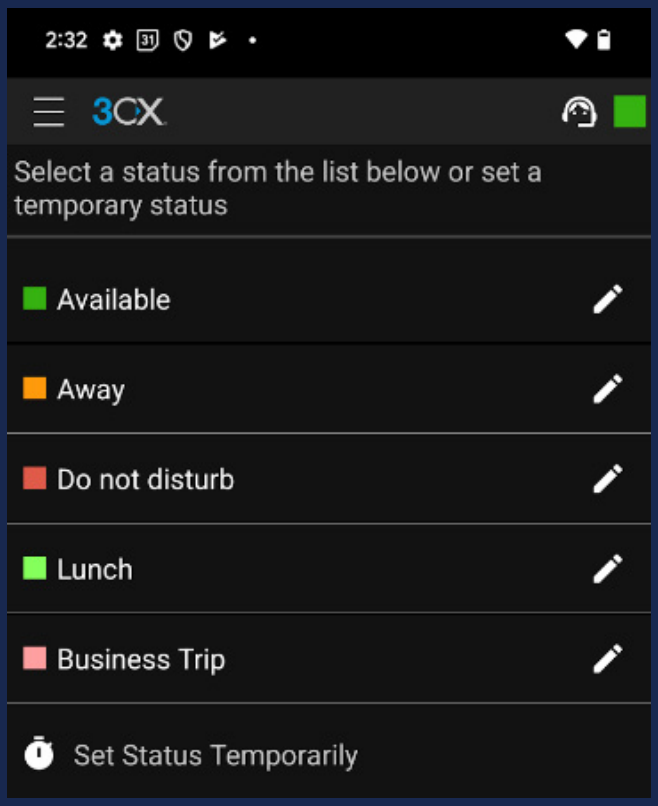
Control your Audio Conference



Have full control of your audio conference by muting, redialing, dropping any of the participants or adding additional participants.

1. Start a 3-way audio conference.
2. Tap on the Conference button.
3. Mute, redial or kick out any of the participants.
4. Tap on the + button to add additional participants.

Set your Status

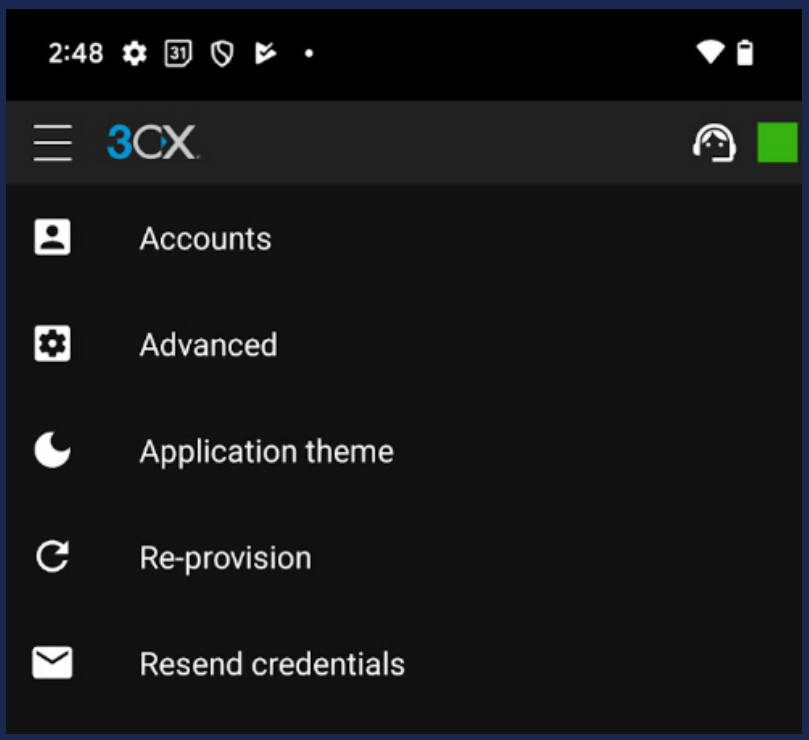


Using the Status feature will let your colleagues know if you're free to take a call, avoiding distractions and wasted time.

Access the status feature by tapping on the top right hand corner, the green box shown above. Choose from *Available, Away, Do Not Disturb, Lunch, Business Trip, and Set Status Temporarily.*

You can further customize your status and call forwarding rules by tapping on the pencil icon next to each status.

Personalise your App



Personalize your app by tapping the app menu button menu in the top left corner and then "*Settings*". Here you will see the following options:

- Accounts: add, edit and switch between accounts
- Advanced: see below
- Choose your app's theme
- Re-provision and
- Resend Credentials

From the "*Advanced*" option you can change a number of settings such as Car/Bluetooth Support, Silence Detection, Battery Optimization, Microphone Gain, Ringtone and more.

Configuring a SIP Trunk

Introduction

To make and receive calls, you have to create an account with a SIP trunk provider (also referred to as a VoIP provider). A SIP trunk provider will connect you to the old-style PSTN. Having your own SIP trunk provider account means you will have full control over your phone numbers and most of the time it also means lower-cost calling. 3CX supports a number of SIP trunk providers. They have been selected based on ease of configuration, ease of account setup, and support.

DID numbers

VoIP providers provide DID (Direct Inward Dialing) numbers (also known as DDI or MSN numbers) which allow you to route calls directly to a queue, ring group, extension or a digital receptionist. These virtual numbers are priced at a fraction of the cost of adding physical lines or SIP trunks.

Outbound caller ID

Outbound calls will by default get the main trunk number as their caller ID. If an extension has a DID assigned, then by default it will use this caller ID. You can still set the caller ID at extension level but only a few providers will allow so called “clip, no screening” as it's been abused by spam callers. If you need to reformat a caller ID, see this guide.

IMPORTANT On-premise / Self-hosted installs should run the firewall check first! Your firewall needs to be configured correctly. See our firewall configuration guide.

Configuring a SIP Trunk

Step 1: Get a Supported VoIP Provider / SIP Trunk

Find a supported VoIP / SIP trunk provider in your country. Using a preferred or supported SIP trunk provider means 3CX is pre-configured to work with the VoIP provider and you can be sure to get support from both 3CX and the provider.

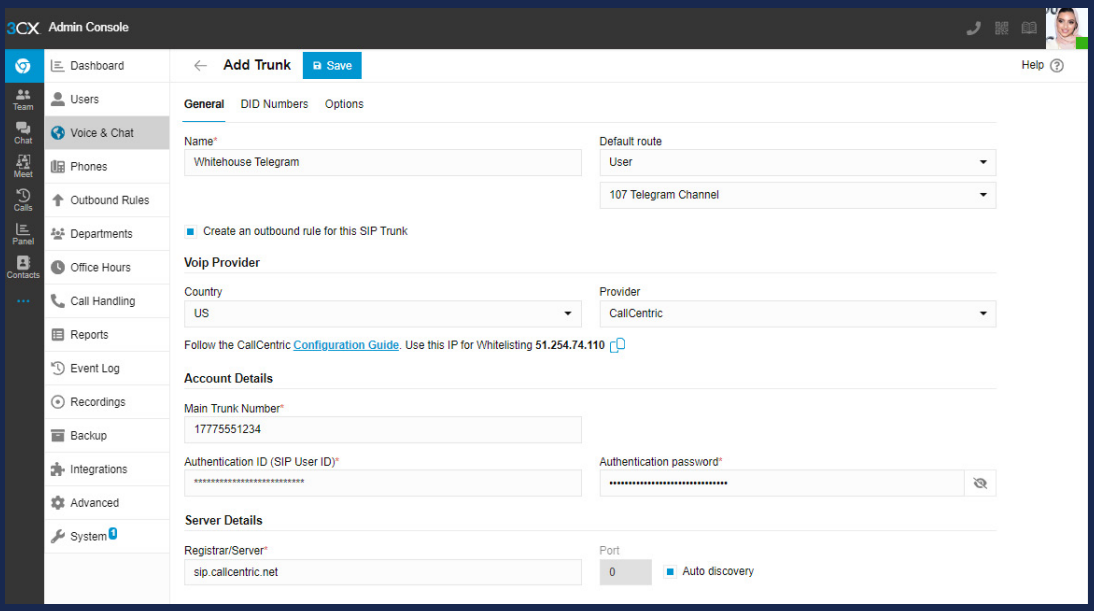
If you do not use a supported provider, make sure that the VoIP provider is familiar with 3CX and will support you in configuring the trunk. You should be aware that in many cases additional support will be required as 3CX will not assist in the configuration of an unsupported VoIP provider.

Try Twilio SIP Trunks

3CX can auto configure a twilio SIP trunk for you. All you will need is an account at Twilio. Twilio has numbers for most countries worldwide.

Step 2: Add the VoIP Provider Account in 3CX

After obtaining a VoIP provider account, you must configure the account in 3CX.



1. Navigate to “Admin” > “Voice & Chat”. Click “+ Add trunk”.
2. Enter a name for this trunk.
3. Now specify the default route, this will be the destination calls will be routed to for DIDs not assigned to an (system) extension. So as soon as you assign the main number to for example your main IVR, then the default route will be ignored for that main trunk number. The same for a DID assigned to an extension. In effect the default route is the destination for any unassigned DIDs.
4. Under SIP Trunk Details, select the country and use the drop-down box to select your provider under the “Trunk” field.
5. If you are using a supported provider the Authentication method will be automatically selected. However some providers offer a choice and in the generic template you must configure it. A SIP trunk authentication is either register based (You will have account details) or IP based, in which case you will need to specify an IP. In the case of an IP based provider, whenever you change the host on which 3CX runs, you will need to liaise with your provider and inform them of the IP change.

Step 1: Get a Supported VoIP Provider / SIP Trunk

6. Now enter registration details, authentication ID and Password or IP given to you by your SIP trunk provider together with your main trunk phone number. In some cases additional options will be requested (based on SIP trunk provider requirements).
7. Click on the “DID Numbers” tab on the top and click “+Add” to add any DID numbers associated with this account. You can also import DID numbers. Here is a sample “.csv” with an example on how to import DIDs.
8. Under the “Options” tab > “Limit to”, specify whether this will be a system wide SIP trunk or a department specific SIP trunk. If system wide, then only system owners and system admins can manage the SIP trunk. If department specific, group owners and admins can also manage the SIP trunk. If you put a SIP trunk into a department, its DIDs will only be visible within the department.
9. Click “Save”. You are now ready to make and receive calls. Once created, you will see a status indicator showing red for not-registered and green for registered.

Step 3: Route the DID Numbers to the Destination

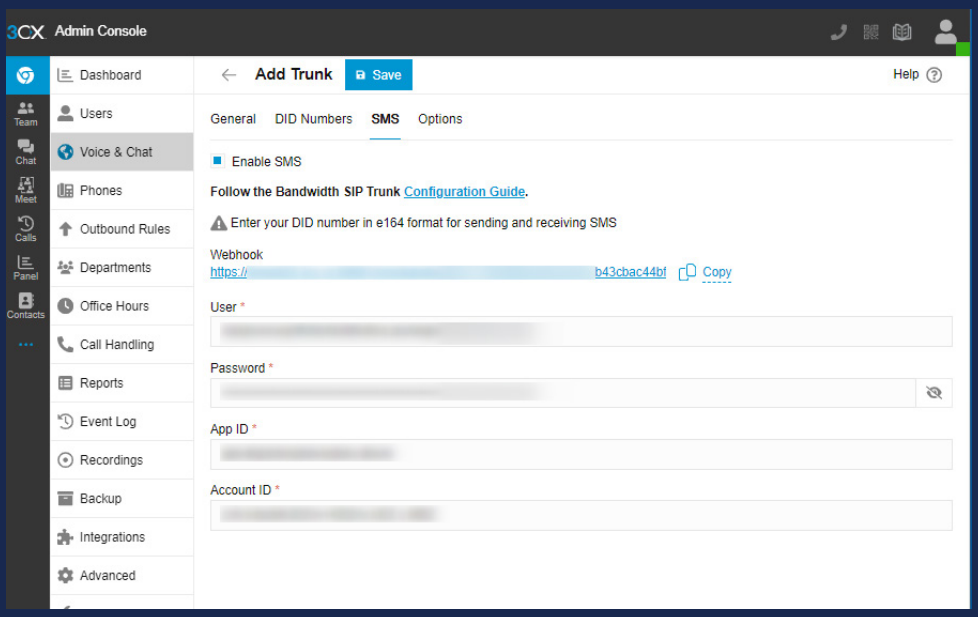
Now you must route the number and optional DID numbers to their destination

- **To route to an IVR, Ring Group, Queue or Digital Receptionist, go to "*Call handling*", select the desired system extension, and select the DID from the "*Assigned DID Number(s)*" drop-down.**
- **To Route an extension, go to "*Users*", select the desired user and under the "*General*" tab select the DID from the "*Assigned DID Number(s)*" drop-down.**

Step 4 - Create an Outbound Rule

After you have configured the SIP Trunk, you will need to create an outbound rule which allows extension users to use this SIP Trunk. To do this you will need to create an outbound rule which will route calls depending on either a prefix, length of number or group membership. (i.e. you can either have a prefix say 0, or you can also have an outbound rule which applies to a set of extensions or all users in a department). For more information see the Configuring Outbound Rules guide.

Step 5: Configure SMS / MMS (Optional)



Some support SMS according to the 3CX guidelines. If this is the case you can insert the webhook provided by your provider. Please note this must be fully supported by your provider.

1. Check the "*Enable SMS*" box to get your unique 3CX webhook.
2. Make sure that all your DID numbers have been entered as E164 numbers! So if your number is (813) 591-0130, then you must enter it as +18135910130.
3. Go to your provider's portal and paste the webhook as explained in the guides:

- VoxTelesys
- Bandwidth
- Flowroute
- For more guides see our SIP trunk provider configuration page.

4. On the portal of your VoIP provider, obtain the "*Access Key*" "*Secret Key*". Enter them here and click "*Save*".