

# **3CX Softphone Quick Reference Guide**





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# Sunco is your Trusted Telecom Systems Integrator Making business communication *easier* for you

From modest beginnings as a home-based, family-run business, Sunco has grown over the past 20 years into the trusted telecommunications partner for over 1,600 businesses across Canada. We are a proud, Canadian company with the love of business communication at the very core of what we do.

Our team lives, breathes and works with these technologies on a daily basis, and understands how complex they can be. That is why we are committed to making business communication *easier* for your organization. How do we do this? By being an *Integrator*. We fit all the pieces of your voice/data systems together into a unified whole - giving you superior design, support, and management all through one point of contact. This strategy ensures you get the technology and services your business needs, delivered in a way that is coordinated, convenient and just *easier*.

No more confusing network service contracts, overseas call centres, long wait times and impersonal service. We promise honest advice and personal support delivered in a way that reflects our core values:

- We Embrace Change
- We Do What It Takes
- We are Accountable to the Outcome
- We do the Right Thing
- We Bring Out the Best in Each Other

The Sunco team is ready to help. Leverage our Integrator strategy to help make business communication *easier* for your organization. Optimize your time to focus on what matters most - *growing your business*.



# Need to reach us? We are ready to help!

**Service:** To enter a service call, please email <u>service@sunco.ca</u> and a ticket will be auto-generated in our system.

**Client Portal:** To receive log-in credentials for our self-service payment and service portal, please call Tammy Klemmer at (780) 809-1786 or 1 (888) 782-9357

**After-hours Emergency Service:** To reach our after-hours on-call technician, please call (780) 809-1786 or 1 (888) 782-9357 and leave a message.

Accounting: For questions regarding invoicing, please call Tammy Klemmer at (780) 809-1786 or <u>tammy.klemmer@sunco.ca</u>



# Install 3CX Softphone

# **Getting Started**

After your system administrator creates your 3CX Softphone account, you will receive a welcome e-mail message that provides your user account information. This includes your login credentials, voicemail dialing number, Web Client URL, QR code for mobile app, and other information. **Retain this e-mail message in a secure location for future reference.** 



# How to log in 3CX Softphone

### **3CX Web Client**

1. To log in 3CX **Web Client**, click on the link in the welcome e-mail <u>https://companyname.my3cx.ca:5001/webclient</u>





2. For your login ID and password, enter in the **extension number** and **password** provided in the welcome emails and select **Login**.



### **3CX Windows App**

1. To install the 3CX **Windows APP**, click Windows at the bottom of the welcome e-mail to download the software.



2. Install the downloaded software.





3. To configure the software, run the attached **config file** in the welcome e-mail.



1. Your 3CX Windows app is setup.



#### **3CX Mobile App**

- 1. On your mobile device, install the **iOS** or **Android** Apps.
- 2. Open the app and scan the QR code at the top of the welcome e-mail.





3. Your 3CX mobile app will load with your account information.



#### **3CX Desktop App**

1. On your Web Client, navigate to Apps in the very bottom left-hand corner.



2. Select **Windows Desktop App** and follow the prompts to **Install** the app. Once the app has been downloaded, select **Provision**.





# Voicemail

# **Setup your Greeting**

1. Open the Web Client, and select the three dots along the left hand side to access the Settings

menu. Select **Greetings**, then click on record greetings. You can setup different greetings for each status.

-	Settings	
٤	General	Greetings
4	Chat	Select or upload a customized greeting message to be played for each profile status
<b>L</b> Team	Audio/Video	Record Greeting
Pa Chat	View	Default Main Greeting.way
Meet	Status	Available
	Greetings	Main Greeting.wav
<b>[.]]]</b> Panel	Integration	Away
	Scan QR Code	Play Default
		Do Not Disturb
	BLF	Play Default

# How to Check Voicemail on the Web Client

1. Select the three dots along the left-hand side and then select the **Voicemail** to review your voicemails.





2. You can download, play, call back, or delete the voicemail by selecting respective icons.



# How to Check Voicemail on the Windows App

1. Navigate to Voicemail icon to review your voicemail.



- 2. Double click on the voicemail you wish to listen.
- 3. You can Play, Play on Phone (which your Mobile App is installed), Call Back, or Mark as Heard or Unheard.

▶	Play
¢	Play on Phone
C	Call
۵	Mark as Heard
<b>2</b> *	Mark as Unheard

### How to Check Voicemail on the Mobile App

- 1. Click on the menu button at the top left corner.
- 2. Select Voicemail.
- 3. Click on the voicemail you wish to listen, or click on  $\leq$  to call back, or click on  $\bigotimes$  to mark it unheard.

# Chat

The chat feature in 3CX Softphone allows you to connect in real time to anyone else in the company. This is a great alternative to a long-drawn-out email or walking over to someone's desk. There are many ways to begin a chat in the 3CX Softphone.

### **Chat From 3CX Web Client**

1. Open the 3CX Web Client.



2. Navigate to the chat menu on the left-hand side.



3. Select the + at the top to start a new one-on-one chat, group chat, or SMS.

+	Q	Search
Start	Chat	
Creat	e Grou	p Chat
Send	SMS	

# **Chat From 3CX Windows App**

- 1. Open 3CX Windows App.
- 2. Navigate to Presence Information menu.



- 3. Select the person you want to chat with.
- 4. Select the > symbol, then start chatting with **chat** icon.

Another way to initiate chat is by selecting the **Chat** menu. Select the **Compose** icon to add *one* or *more* people for *one-on-one* or *group* chat.





# **Chat From 3CX Mobile App**

1. Open **3CX Mobile App** and navigate to the **Status** menu.



- 2. Select the (i) icon next to the person you want to chat with.
- 3. Start chat with the **Message** icon **9**.
- 4. You can also initiate chat by selecting Chat menu.



- 5. Click on 🗹 icon.
- 6. Compose chat or group chat or SMS.



# Contacts

On the 3CX Softphone, you can view contacts through the Web Client, Mobile App, or Windows App.

### Team

On the 3CX **Web Client**, select to view your corporate directory.

From here, you can search for the contact you're looking for and place a **call**, **start a video**, **start a chat**, or **favorite** the contact so they are saved to your favorites folder.



### Company

If there are contacts that your business frequently dials that are external to the company, your 3CX System Administor can upload a customized company directory that will contain these external phone numbers.



1. To access company contacts, select the three dots along the left hand side and select **Contacts**.



2. Select the drop down on the top right hand corner to filter by **Company**. This will allow you to view contacts that are visible to all 3CX users in your organization.



### Personal

To add personal contacts that are only visible to your device on the 3CX Web Client, navigate to the **Contacts** menu, select the drop down on the top right-hand corner & filter by **Personal**, and then select

+ to add new contacts.

# Manage Your Status

On the 3CX Softphone, you can manage your status through the Web Client, Mobile App, and Windows App. Each individual status can be configured with a custom status message. Each status also determines where you will receive incoming calls. Ex: In Do Not Disturb, incoming calls immediately go to voicemail. Your status will be visible to your colleagues.

### **Change your Status - Web Client**

1. On 3CX Web Client, click on icon besides your avatar at the top left corner to change your status.

E Team	
Guo Kevin 2673	
Available	j
Away	Í
Do Not Disturb	Í
Lunch	Í
Out of Office	Í
© Set Status Tempora	rily
Q Logout from queue	
Exit Client	



# **Change your Status - Windows App**

1. To change your status, navigate to the **Status** menu at the top left corner. Or, if your BLF buttons have been configured to control your status, you can activate these BLF buttons by selecting **Show BLF side panel**.



# Change your Status - Mobile App

1. On the **Mobile App**, select the green square in the top right corner of the app, and change your status.





# **Call History**

# **View Call History on Web Client**

1. Navigate to Calls.



2. Filter by **Incoming**, **Outgoing**, **Missed** and **Abandoned** calls. Select <sup>5</sup> to place a phone call, <sup>1</sup> to chat (if applicable), or <sup>1</sup> to delete the call log.



# **View Call History on Windows App**

1. Select the Call History icon to view Incoming, Outgoing, Missed, and Abandoned calls.



# **View Call History on Mobile App**

1. Select Recents to view Incoming, Outgoing, Missed and Abandoned calls.





# Call Handling

# **Select Device**

- 1. To place an outgoing call, you must first decide which device you would like to place the call with. On the 3CX Web Client, navigate to at the top right corner and select **Call using.**
- 2. Select **Browser**, **Smartphone** or **3CX Client for Windows** from the drop-down menu to decide the device you wish to use.



# Make a Call

1. On the 3CX Softphone, you can initiate a call by using the Dialpad or selecting a phone number from **Call History**, **Contacts**, or **Team**.

# **Answer a Call**

1. When you receive an incoming call, you can answer it by selecting the green telephone icon so decline by selecting the red telephone icon.

# Transfer a Call

When transferring a call, it is important to determine if you would like to perform a blind or attended transfer. This would involve whether we want to introduce the call to the person we are transferring to or not. Please see below on how to perform both methods.

### **Blind Transfer**

A blind transfer transfers the call instantly to the selected destination. In the active call, select **Transfer.** and enter the name or number of the person you want to transfer the call to. The call is transferred without speaking to the receiver.





### **Attended Transfer**

In the active call, select **Att.transfer** to put the current call on hold and starts a new call to the selected destination. Once the destination confirms to accept the held call, you can join both calls together.

# **Record a Call**

1. In the 3CX Softphone, at any time during a call you may record the conversation. Simply click on **Record** to begin and click again to end the recording.



### How to Access Recordings

1. In the Windows App, navigate to the Settings menu.

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2. Select Recordings to access recordings.



3. In the **Web Client**, navigate to **Recordings**. You can review All Recordings belonging to your group or your own personal recordings. Recordings can be downloaded, played back, and deleted





# Forward a Call on Web Client

1. On the **Web Client**, navigate to the **Settings** menu and select **Status**. Setup call forwarding based on your status.



2. In the drop-down menu, **Forward Internal/External Calls**, you can select to forward incoming calls to voicemail, an extension number, an external number, system extension or send busy.



# Forward a Call on Mobile App

1. On the **Mobile App**, you can setup call forwarding based on your status. To get started, select your status on the top right corner.

<b>∃</b> 3CX		22
	R	teady for calls
1	2	3
4	5	6 MND
7 *3*5	8	9 www.z
*	0 +	#
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2. The **Status** window will pop up. Select the desired status you want to setup call forwarding and click on the arrow besides it.





3. Select the scenario in which you would like to setup call forwarding. The below example shows how to forward a call to 7808092673 when an external incoming calls is unanswered for 10 seconds.



4. Click the arrow to change your desired call forwarding destination and select **External Number**.



5. Enter the destination phone number 7808092673 and **Close** the window. Then **Apply** all the changes.



### **Create a Conference Call**

In an active call, select the **Conference** button and enter the name or number of the person/s you would like to add to the call. Once the third party answers the call, they will be added to the three-party conference.



# Audio or Video Conference

### **Schedule Conference on Web Client**

1. On Web Client, navigate to Meet.





- 2. Select to create a new Audio, Video or Webinar conference. You can decide the conference schedule by selecting Now or Later.
- 3. Fill in the details. From **Select Email** / **Calendar to add to** drop-down menu, select "Google", "Microsoft 365", "Outlook Online", "Desktop Outlook (.ics)" or "Email (Legacy, No RSVP)".
- 4. Click on **Create Meeting** and a new tab will open in which you can create the calendar event for your meeting and invite participants.
- 5. If you are using Outlook on your desktop, an .ics file will download. Open the file and a pre-filled calendar entry will open on your desktop. Click on **Invite Attendees** to add your participants. Select **Send** to schedule your meeting and invite participants.

### Schedule Conference on Windows App

1. On **Windows App**, select **Conference** menu at the bottom, then click on 🕤 to schedule an audio or video conference.



 Fill in the conference details. In the drop-down Select Email / Calendar to add to menu, select "Google", "Microsoft 365", "Outlook Online" or "Desktop Outlook (.ics)". Click on Schedule button at the bottom to schedule the conference, then click on Schedule.





3. If you are using desktop Outlook, the Windows App will require you to download an .ics file. Open the file and a pre-filled calendar entry will open on your desktop. Click on **Invite Attendees** to add your participants. Click on **Send** to schedule your meeting and invite participants.

# Join 3CX Conference for Non-3CX Users

Please note that non-3CX users can join 3CX Video Conferencing, however, they must first download the 3CX Video Conferencing App to join. Once the app is downloaded, click on the conference link enclosed in the email. The interface will be shown as below. Select **Join Now**, to join the video conference created.



### Schedule an Audio Conference on Mobile App

- 1. Tap on the menu button at the top left corner.
- 2. Select Meetings.
- 3. Click on **New** at the top right corner to fill in the conference details, schedule the conference and invite participants by clicking on **Add Contact**.
- 4. Click on Done.



# Video Conference

# Video Conference on Web Client

### **Start Video Conference**

1. On Web Client, navigate to Meet, and then click on

to initiate a video conference.

- 2. Click Join Now to start the video conference.
- 3. Click on  $\stackrel{\text{le}}{\leftarrow}$  to invite participants.

In 3CX Video Conference, the organizer can define other participants' rights as below,

- a. "Co-host" Has full control of the web meeting and can use all the available features, as well as use the Remote Control function, control cameras, microphone and chat access. Co-hosts can also accept, reject or kick a user out of a meeting.
- b. "Presenter" Can share screen, reply to remote control requests, initiate polling, and share files and PDF documents.
- c. "Participant" Can participate, reply to remote control requests and polls, chat, and open shared files.

#### Manage Video Conference

3CX Video Conference provides a variety of features, such as Screen Sharing, Whiteboard, Polling, etc.

1. Click on Turn Camera On/Off icon to enable/disable camera.



- 2. Click on Mute/Unmute Audio to enable/disable microphone.
- 3. Click on **Record**, then select **Start Recording** to begin recording your video conference.
- 4. Click on **Present** to conduct a productive presentation or collaborate with colleagues. You can choose **Whiteboard**, **Share PDF**, **Start Screen Sharing**, **Start Camera Sharing**, **Start a new Poll**.

#### Chat

Use the **Chat** panel to share any file between meeting participants. Hosts and presenters can share files with size up to 64MB each, by:



- Drag-and-drop in the **Chat** panel.
- Clicking the **Upload File** icon and selecting the file(s) to share.

All participants can click on shared files to open and save on their PCs.

Shared files are kept on secure 3CX servers for the duration of the meeting and then deleted.

#### Reactions

All roles can raise their hands by clicking the  $\begin{tabular}{ll} \hline \end{tabular}$  icon.

# Video Conference on Windows App

#### **Start Video Conference**

1. Click on Start a 3CX Video Conference Now icon at the bottom of Windows App.



2. The rest of procedures will work as same as Video Conference on Web Client.



# Your trusted telecom systems integrator

We do the right thing We embrace change We do what it takes We are accountable to the outcome We bring out the best in each other

### DIALED INTO YOUR BUSINESS SUNCO.CA