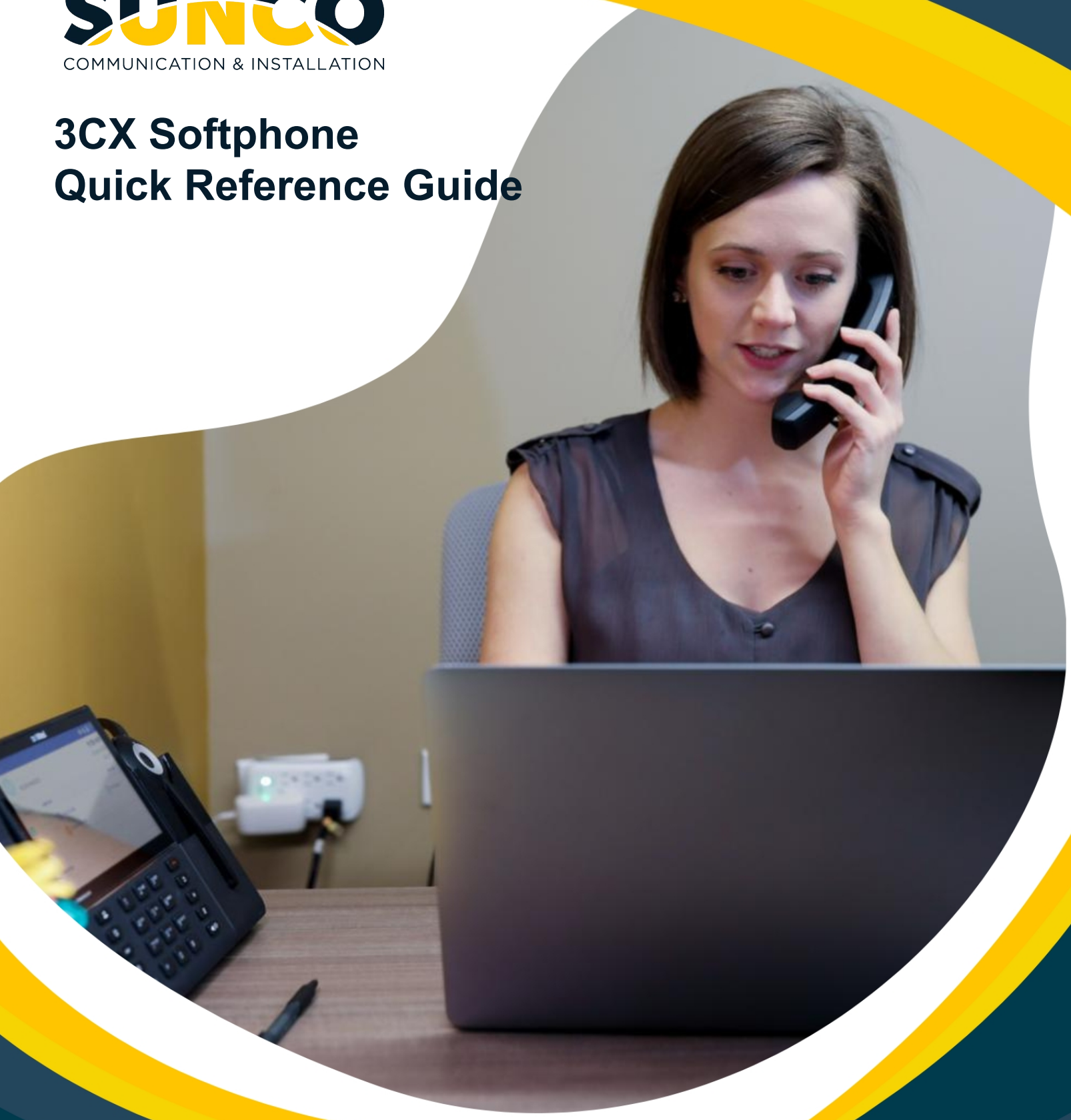
SUNCO
COMMUNICATION & INSTALLATION

3CX Softphone
Quick Reference Guide



SUNCO
COMMUNICATION & INSTALLATION

Table of Contents

About SUNCO **2**

Install 3CX Softphone **3**

Getting Started 3

How to log in 3CX Softphone 3

3CX Web Client 3

3CX Windows App 4

3CX Mobile App 5

3CX Desktop App 6

Voicemail **7**

Setup your Greeting 7

How to Check Voicemail on the Web Client 7

How to Check Voicemail on the Windows App 8

How to Check Voicemail on the Mobile App 8

Chat **8**

Chat From 3CX Web Client 8

Chat From 3CX Windows App 9

Chat From 3CX Mobile App 10

Contacts **10**

Team 10

Company 10

Personal 11

Manage Your Status **11**

Change your Status - Web Client 11

Change your Status - Windows App 12

Call History **13**

View Call History on Web Client 13

View Call History on Windows App 13

View Call History on Mobile App 13

Call Handling **14**

Select Device 14

Make a Call 14

Answer a Call 14

Transfer a Call 14

Attended Transfer 15
Record a Call 15
How to Access Recordings 15
Blind Transfer 14
Forward a Call on Web Client 16
Forward a Call on Mobile App 16
Create a Conference Call 17
Audio or Video Conference 17
Schedule Conference on Web Client 17
Schedule Conference on Windows App 18
Join 3CX Conference for Non-3CX Users 19
Video Conference 20
Video Conference on Web Client 20
Start Video Conference 20
Schedule an Audio Conference on Mobile App 19
Manage Video Conference 20
Chat 20
Reactions 21
Video Conference on Windows App 21
Start Video Conference 21

Sunco is your trusted independent business telecom and managed IT systems integrator

At Sunco, our passion is to make business communication easier for our clients.

We are your trusted independent business telecom and managed IT systems integrator, with more than 20 years of experience helping companies get more from their telecommunications and IT services. Our focus on becoming a long-term strategic partner to each of our clients is second to none.

We help clients of all sizes find areas of cost savings, increased protection and improved performance. Our experience with both the fundamental and cutting-edge of business communications and managed IT services allow us to work with businesses to determine the best solutions to support their ongoing success and provide added peace of mind.

From everyday business telecom services to implementing fully managed, customized cloud, networking and security solutions that can scale as a business grows, we help our clients identify, adopt and implement the secure, flexible, scalable and personalized services they need to succeed. And we deliver high-quality, integrated business communications and managed IT solutions with the employee-level commitment and collaborative approach every client relationship deserves.

Need to reach us? We're ready to help!

Service: To enter a service call, please email service@sunco.ca 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, email billing@sunco.ca or please call (780) 809-1786 or 1 (888) 782-9357.

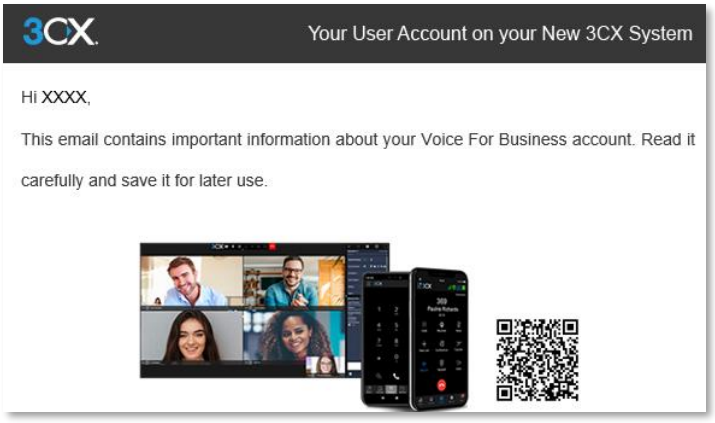
After-hours Emergency Service: To reach our after-hours on-call technician, please call (780) 809-1786 or 1 (888) 782-9357 and leave a message.

Accounting: For questions regarding accounting, please call (780) 809-1786 or email billing@sunco.ca.

Install 3CX Softphone

Getting Started

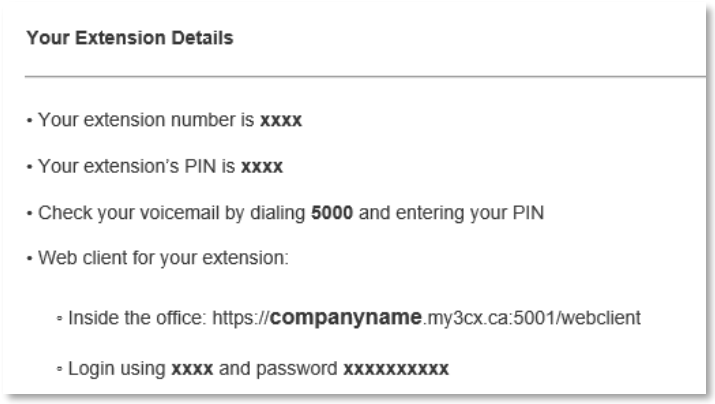
After your system administrator creates your 3CX Softphone account, you will receive a welcome e-mail message that provides your user account information. This includes your login credentials, voicemail dialing number, Web Client URL, QR code for mobile app, and other information. **Retain this e-mail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



How to log in 3CX Softphone

3CX Web Client

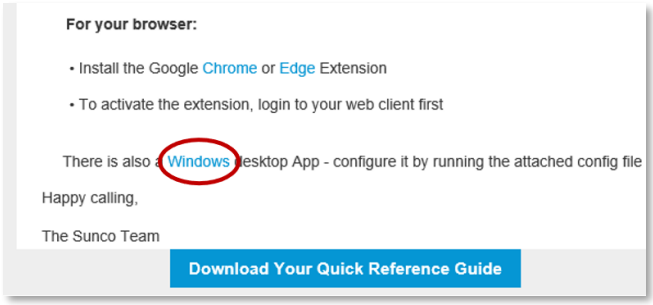
1. To log in 3CX **Web Client**, click on the link in the welcome e-mail https://companyname.my3cx.ca:5001/webclient



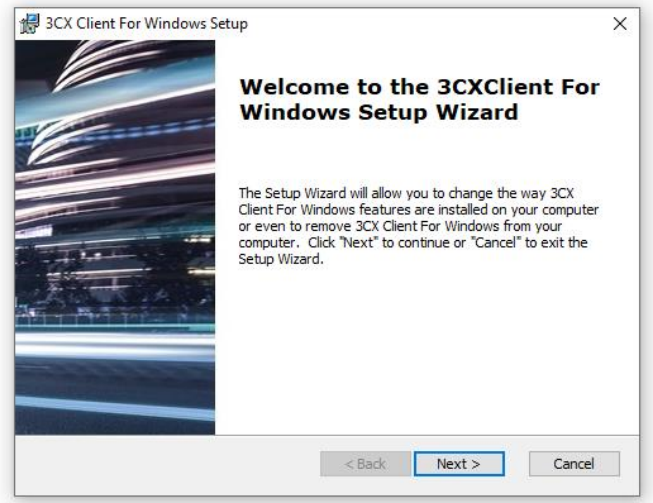
2. For your login ID and password, enter in the **extension number** and **password** provided in the welcome emails and select **Login**.

3CX Windows App

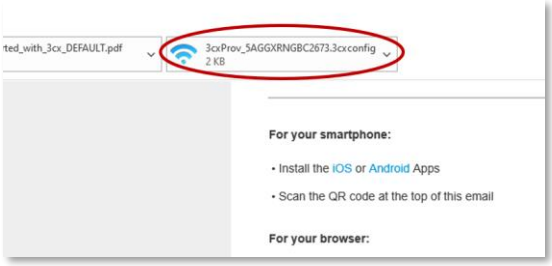
1. To install the 3CX **Windows APP**, click Windows at the bottom of the welcome e-mail to download the software.



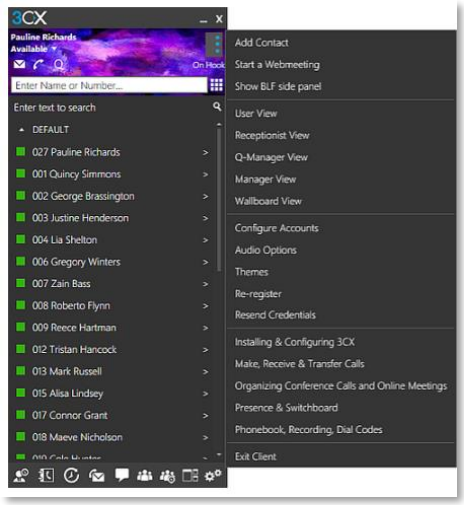
2. Install the downloaded software.



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



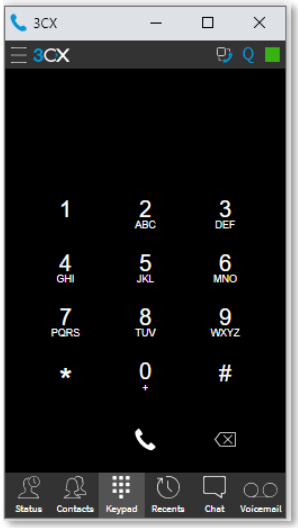
1. Your 3CX Windows app is setup.



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.

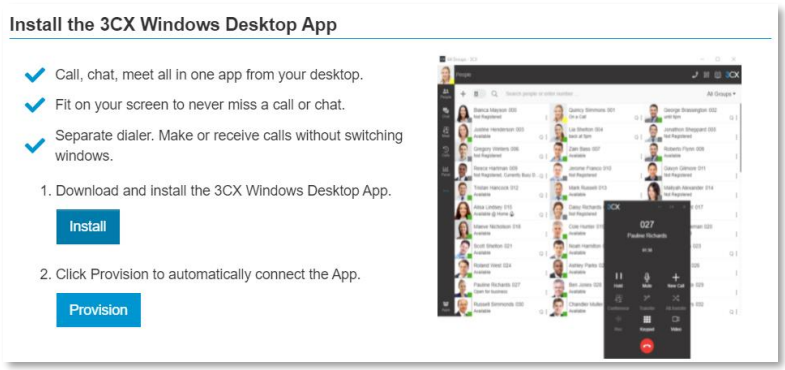
3. Your 3CX mobile app will load with your account information.



3CX Desktop App

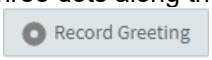
1. On your **Web Client**, navigate to **Apps** in the very bottom left-hand corner.

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

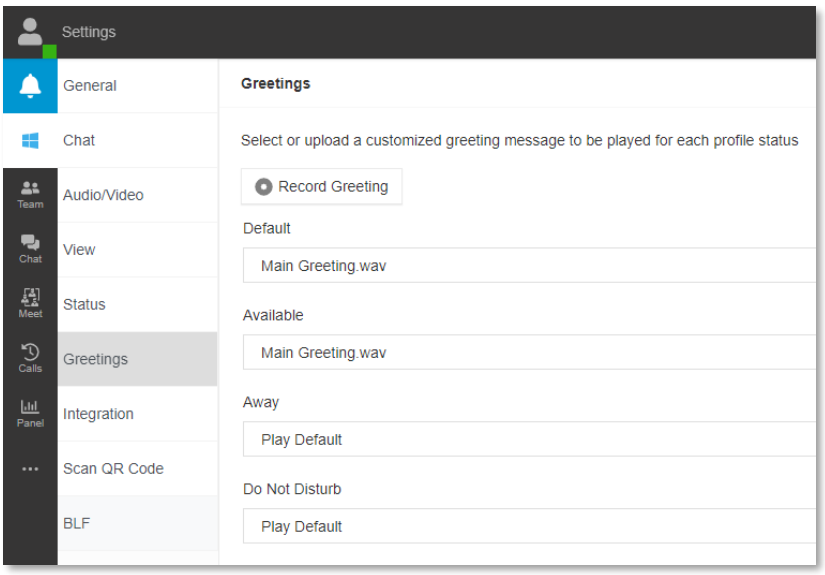


Voicemail

Setup your Greeting

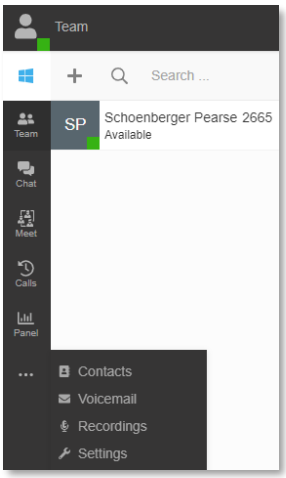
1. Open the **Web Client**, and select the three dots along the left hand side to access the **Settings** menu. Select **Greetings**, then click on 

to record greetings. You can setup different greetings for each status.



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.

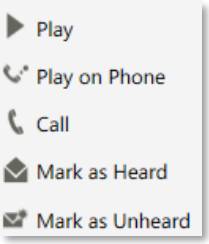


2. You can download, play, call back, or delete the voicemail by selecting respective icons.

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.



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 to call back, or click on to mark it unheard.

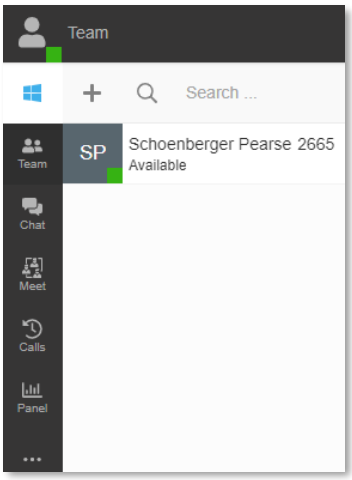
Chat

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.

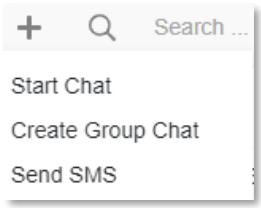
Chat From 3CX Web Client

1. Open the **3CX Web Client**.

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

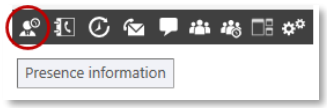


3. Select the + at the top to start a new one-on-one chat, group chat, or SMS.



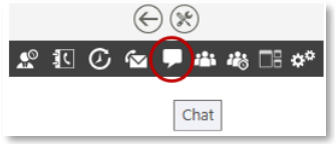
Chat From 3CX Windows App

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.

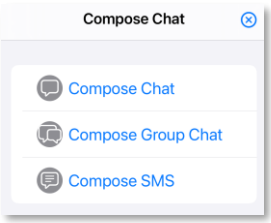


Chat From 3CX Mobile App

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

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

5. Click on icon.
6. **Compose** chat or group chat or SMS.



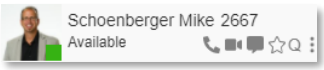
Contacts

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

Team

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

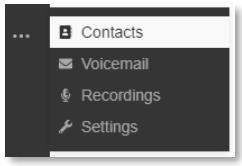
From here, you can search for the contact you're looking for and place a **call, start a video, start a chat,** or **favorite** the contact so they are saved to your favorites folder.



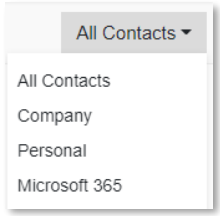
Company

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

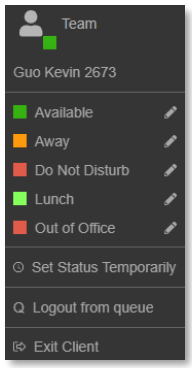
To add personal contacts that are only visible to your device on the 3CX Web Client, navigate to the **Contacts** menu, select the drop down on the top right-hand corner & filter by **Personal**, and then select + to add new contacts.

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.

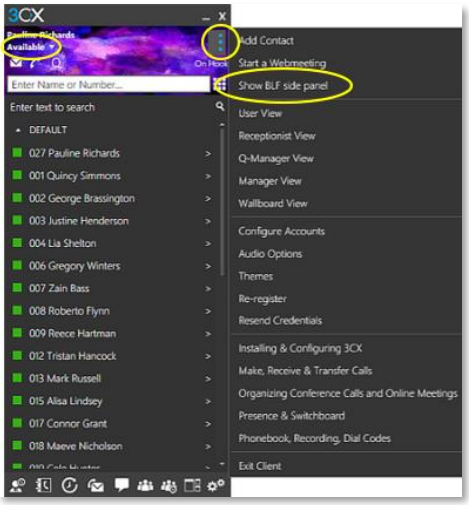
Change your Status - Web Client

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



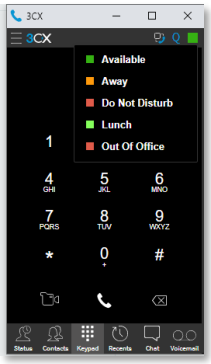
Change your Status - Windows App

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

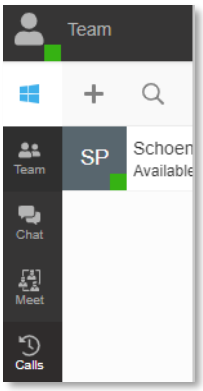
1. On the **Mobile App**, select the green square in the top right corner of the app, and change your status.



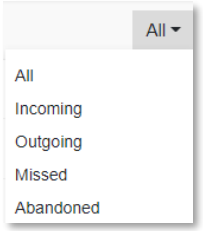
Call History

View Call History on Web Client

1. Navigate to **Calls**.



2. Filter by **Incoming**, **Outgoing**, **Missed** and **Abandoned** calls. Select to place a phone call, to chat (if applicable), or 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.

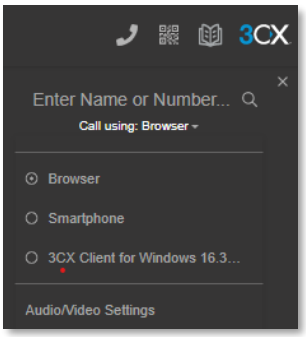
View Call History on Mobile App

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

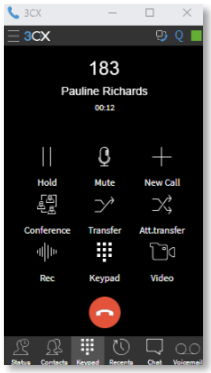
1. When you receive an incoming call, you can answer it by selecting the green telephone icon or decline by selecting the red telephone icon.

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.

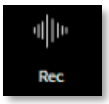


Attended Transfer

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

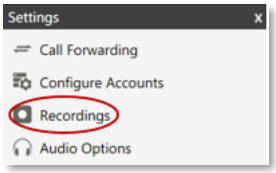
1. In the 3CX Softphone, at any time during a call you may record the conversation. Simply click on **Record** to begin and click again to end the recording.



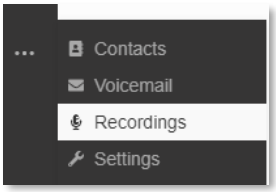
How to Access Recordings

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

2. Select **Recordings** to access recordings.

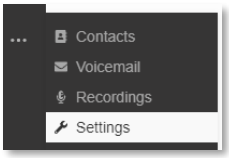


3. In the **Web Client**, navigate to **Recordings**. You can review All Recordings belonging to your group or your own personal recordings. Recordings can be downloaded, played back, and deleted

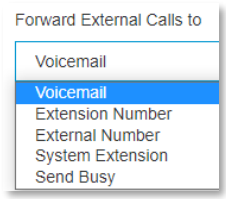


Forward a Call on Web Client

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

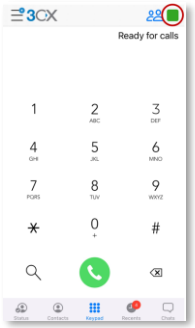


2. In the drop-down menu, **Forward Internal/External Calls,** you can select to forward incoming calls to voicemail, an extension number, an external number, system extension or send busy.

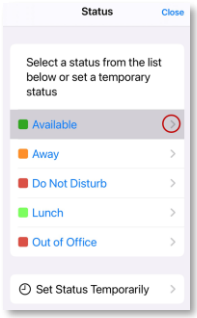


Forward a Call on Mobile App

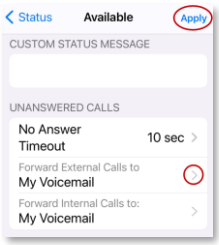
1. On the **Mobile App**, you can setup call forwarding based on your status. To get started, select your status on the top right corner.



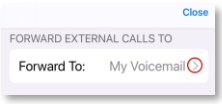
2. The **Status** window will pop up. Select the desired status you want to setup call forwarding and click on the arrow besides it.



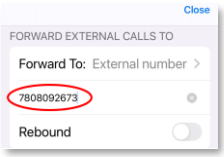
3. Select the scenario in which you would like to setup call forwarding. The below example shows how to forward a call to 7808092673 when an external incoming calls is unanswered for 10 seconds.



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

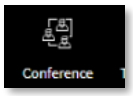


5. Enter the destination phone number 7808092673 and **Close** the window. Then **Apply** all the changes.



Create a Conference Call

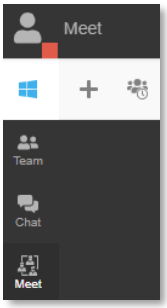
In an active call, select the **Conference** button and enter the name or number of the person/s you would like to add to the call. Once the third party answers the call, they will be added to the three-party conference.



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**.

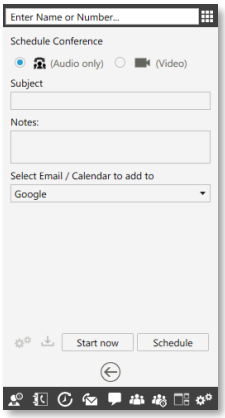
3. Fill in the details. From **Select Email / Calendar to add to** drop-down menu, select “Google”, “Microsoft 365”, “Outlook Online”, “Desktop Outlook (.ics)” or “Email (Legacy, No RSVP)”.

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.

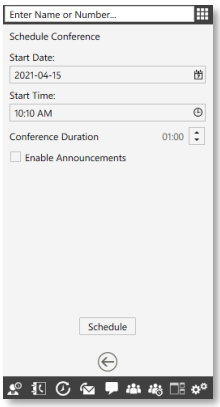
5. If you are using Outlook on your desktop, an .ics file will download. Open the file and a pre-filled calendar entry will open on your desktop. Click on **Invite Attendees** to add your participants. Select **Send** to schedule your meeting and invite participants.

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.



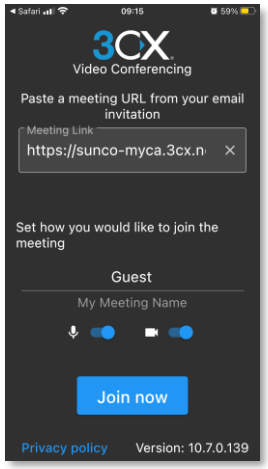
2. Fill in the conference details. In the drop-down **Select Email / Calendar to add to** menu, select “Google”, “Microsoft 365”, “Outlook Online” or “Desktop Outlook (.ics)”. Click on **Schedule** button at the bottom to schedule the conference, then click on **Schedule**.



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 to start the video conference.

3. Click on 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.

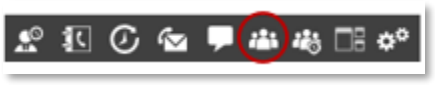
Reactions

All roles can raise their hands by clicking the 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 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

www.sunco.ca