



## 3CX Mobile Application Guide

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# Mobile Application Guide

## Overview

The purpose of this document is to help walk you through the features and functions of your new 3CX Mobile Application.

We're here to help! If you have any questions about the new functionality please reach out to us at [support@datacommplus.com](mailto:support@datacommplus.com).




## Mobile Application Guide

### Download the 3CX Mobile App

You will need to first download and log into the 3CX web client first. Once you are logged into the web client, download the 3CX Mobile app on your mobile device from either the App Store or Google Play.

- You will be asked if you want to download the contacts on your mobile phone, say no otherwise it will download your personal phone contacts
- You will want to allow the app access to your camera

The steps below will help you log into the 3CX Mobile App once you have downloaded the app.

- Within the web client select the QR code icon  in the upper right corner
- A popup window will appear that contains a QR code
- Within the mobile app select the hamburger icon next to the 3CX logo 
- Select Accounts
- Select the Add link in the upper right corner 
- Once you select Add you can scan the QR code on the web client
- Your account will then be synced on your mobile device.

### Status

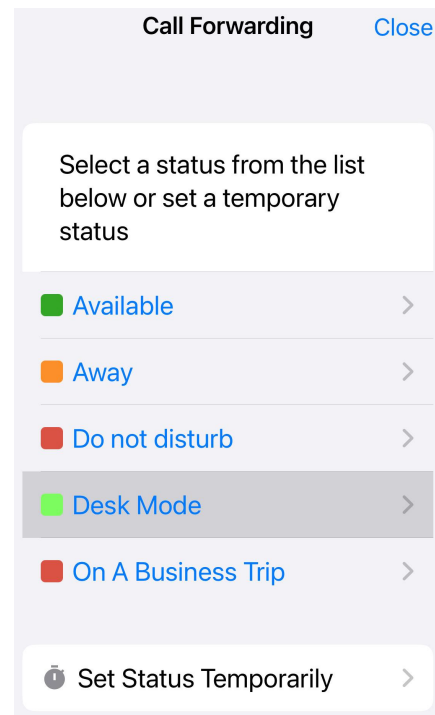
Let others know when you're away or you don't want to be disturbed.

The status indicator is located in the upper right corner of your screen. The color in the box states the status of the contact.

To change your status select the indicator and select a different status from the list available

- Yellow - Currently on a call.
- *Available* - Will ring on every device
- *Away*
- *Do not disturb*
- *Lunch*
- *On A Business Trip*



To define what happens when you are in that status, select the > across from the status.



### Answering and Placing a Call


#### Answering a Call


When a call comes in, a window appears within the mobile client app.

- Select  to Answer the call
- Select  to ignore the call and have it ring to voicemail

If the app is not open on your phone, a popup window will appear notifying you there is a call.


#### Placing a Call

To make phone calls click on the Keypad icon  which will bring up the dialer

- Select the Keypad icon on the toolbar.
- Dial the phone number
- Select the Send button 

*No prefix is required when placing an outbound call*

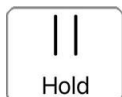
#### Placing an Internal Call

- Select the Contacts icon  on the toolbar.
- Do a search by name, extension or email address in the search field
  - You can also scroll down until you see the name of the person you would like to call.
- Select the name
- The phone will automatically dial that contact's phone number.

### Hold, Transfer, Park and Conference Call



### Placing a Call on Hold



It is best practice to put a call on hold if you do not need to transfer the call to anyone else. If you need to transfer the call to someone else, follow the steps below for either transferring a call or parking the call.

- While on a call, press the *Hold* icon
- The *Hold* icon will change to *Resume* and illuminate blue
- To resume the call select the *Resume* icon.

### Transfer a Call



There are two options for transferring a call:

- Blind Transfer - Transfer a call directly
- Attended Transfer - Introduce a call before it is transferred.

### Blind Transfer

- When on a call, select the *Transfer* icon
- Select the *Transfer* icon again
- Dial the extension or type in the name of the person you want to transfer the call to.
  - Results will appear. Select the name of the person
- The call is transferred

### Attended Transfer

- When on a call, select the *Transfer* icon



- Select the *Att Transfer* icon
- You will be brought to a search screen where you will find the contact's name you would like to transfer the call to, select the name.
- You will be transferred to the contact to introduce the call
- Once you have introduced the call select *Join* icon
- The call is now transferred

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### Parking a Call

Call Parking is a type of Call Holding. When you park a call, that call can be picked up from ANY phone on the system. If a call is put on hold, you can only pick the call up from that phone.

We do not recommend parking a call with a mobile device. You cannot see what parking spots are available on a mobile device so you may possibly park two calls together. We recommend doing that with the web client app if you have that available.

### Steps to pick up a Parked call

When you have been notified that there is a call parked for you:

- Select the *Keypad* icon 
- Select the magnifying glass  within the keypad next to the Send key
- Type in the parking spot in the search field that you were told that the call is parked on.  
**You need to use capital letters, lowercase will not work.**
  - Ex: If you are told there is a call for you on SP0 you would type in SP0 in the search field
- You will see that Call SP0 will appear in the results, select that link
- You are now connected with the call.

### Conference Call

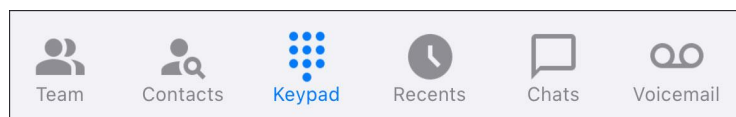


Below are the steps to make a conference call

- When on the live call select the *Conference* icon . The call will be put on hold
- Type in the name/phone number of the person you would like to conference
- Select their name or select Call (phone number)
- When that person answers the calls will merge

### Toolbar

At the bottom of the mobile application you will see a set of icons. Below is a description of what each icon does.



- Team - Lists the users and their status
- Contacts - List of users on the system as well as additional contacts
- Keypad - Dial pad to dial extensions and numbers
- Recents - A list of call history and for callbacks
- Chats - A list of chat history and to respond to chats
- Voicemail - A list of your new and saved voicemails

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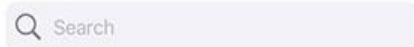
### Team

When you select the Team icon you will be brought to a screen that shows a list of all of your team members. From that screen you can see their status and also select their name to call them.

### Contacts

When you select the Contacts icon you will see all of your team members and any contacts you have created. The contacts you add will only be visible to you.

- Select the Contacts icon
- Type the name in the search field



- Select the name from the results
- Once on the details screen select the phone icon

### To Add a Contact

- When on the Contact screen select the Add link in the upper corner
- Fill in the details you have for the contact
  - Select View More to see more contact fields
- Select Done in the upper corner once you are finished
- The contact has now been added

### Recents

Recents will show you the call history including calls that were answered and calls that were missed. A red dot with a number above the Recent button indicates that a call has been missed.



### View call history

- Select Recents to see answered and missed calls
- Select the contact name to call them back
- Select the three dots across from the name you will see the following details
  - Caller ID
  - When the call was made/received
  - How long the call lasted

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### Chats

Chat allows you to search and chat/share with other users on the same phone system.

To start a chat

- Select Contacts
- Select the name of the person you would like to start a chat with
- On the contact detail screen select the message icon

To pick up a chat

- Click on the chat conversation, then click on the Take icon in the top right corner.

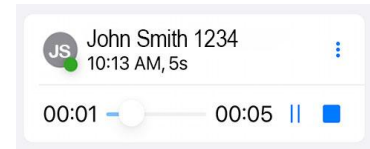
### Voicemail

A red dot with a number above the Voicemail button indicates that a voicemail has been left.



To retrieve a voicemail

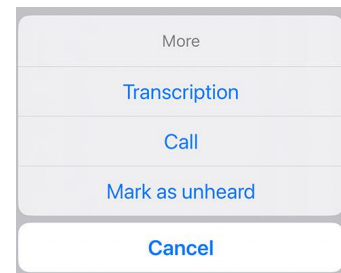
- Select the voicemail icon
- Click on the voicemail you would like to hear and it will play



### Voicemail options

Select the 3 dots on the side of the voicemail for the following options:

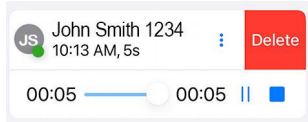
- Transcription
- Call the caller back
- Mark the voicemail as unread



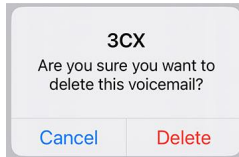


### Delete a voicemail

- Select the voicemail icon
- Swipe left on the voicemail and the option to delete the voicemail will appear





- Select Delete
- A notification will appear asking if you are sure, select Delete



### Settings

From the menu you can easily switch between accounts and view their details as well as add a new extension.

- Access Settings by pressing the hamburger menu icon at the top.  
- Select Accounts
- Add new accounts from there

From here you can also:

- See Recordings
- Schedule - If enabled
- Meetings - If enabled
- Settings - How notifications are handled
- Scan a QR code.

If you need further assistance, please reach out to us at [support@datacommplus.com](mailto:support@datacommplus.com). Once we receive your request one of our representatives will get back to you as soon as possible to help you with any of your phone system needs.