

3CX Web Client Training Guide

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Web Client Guide

Overview

The purpose of this document is to help walk you through the features and functions of your new 3CX Web Client. The 3CX Web Client is easy to use and combines all the features you need to efficiently communicate, collaborate and connect with colleagues straight from your browser.

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

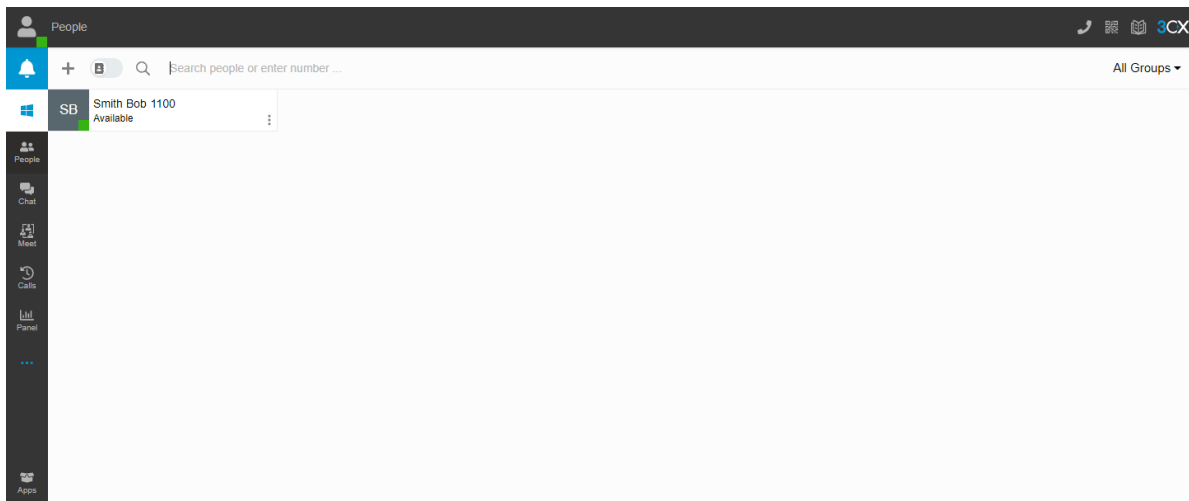
Logging into the Web Client

You will receive a welcome email that will contain a link to the Web Client edition and the login credentials that you will need to log into the Web Client.

- Click on the link within the email and then bookmark the page in your browser
- Use the credentials within the email to log into the client
- Select the Windows icon and then Web App (PWA) Install button

Initial steps to be taken once logged in

Once you are logged into the web client you will want to set up permissions and also select your preferred device and seamlessly control calls from the web client interface.



Setting Your Permissions

Depending on the browser you are using you will want to set permissions to allow for the following:

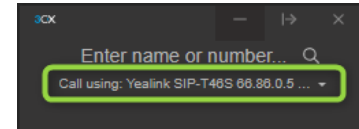
- 3CX be able to send notifications
- 3CX to have access to your microphone, camera and sound

Binding a Device

You can seamlessly place calls from your IP phone, the iOS or Android app, web client or the Windows app. In order to use your mobile device you will first need to download the 3CX mobile app on your mobile device. Once you have completed those steps and synced your account within the mobile device you can use the phone selector in the web client interface.



- After clicking the phone selector, you may select *Call using*: to change devices
- Select your preferred device



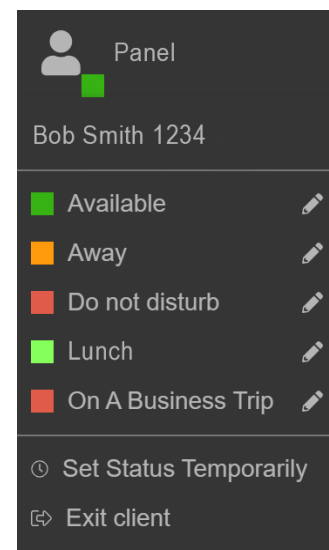
Status

Make the most of the Status feature to save time and increase efficiency by seeing 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.

The status indicator is located in the bottom right corner of your profile picture. The color in the box states the status of the contact.

To change your status you would select a different status from the drop down menu



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



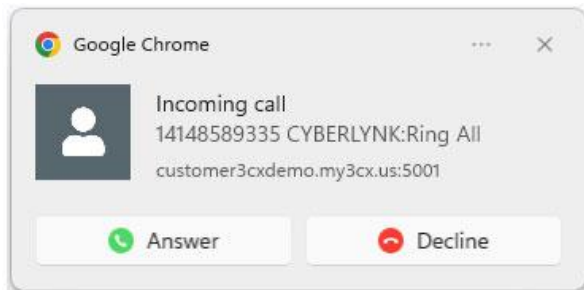
Answering and Placing a Call

Answering a Call


When a call comes in, you will hear it ring through your laptop along with a window appearing in the web client app.

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

If the client is minimized, a popup window will appear.

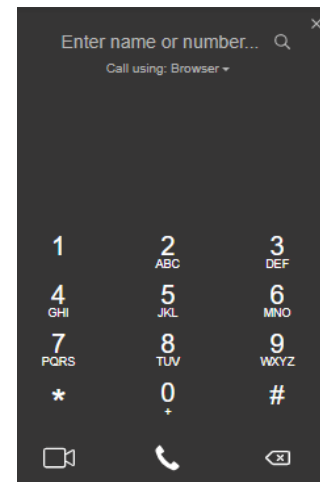


Placing a Call


To make phone calls click on the *Phone* icon  in the upper right corner which will bring up the dialer

- Dial the number by using your keyboard and then enter

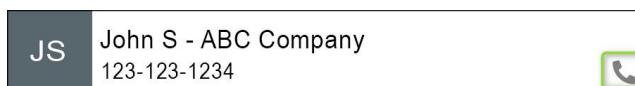
No prefix is required when placing an outbound call



Placing an Internal Call

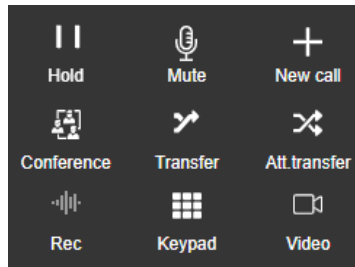
To make an internal call select the *Team* icon  on the left-hand side of the Web client

- On the Contacts screen locate the name and then select the phone icon within the contact detail box.





- The device you have chosen to call from will ring and show Make Call.
- Select accept/answer and the number will dial

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


Blind Transfer - Dialer


To transfer a call directly

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


Blind Transfer - Panel

Follow the steps below to transfer a call through the Panel Web Client icon.

- Select the Panel icon on the left hand side menu 
- You should now see your phone call (ex below: Customer has called Jane)

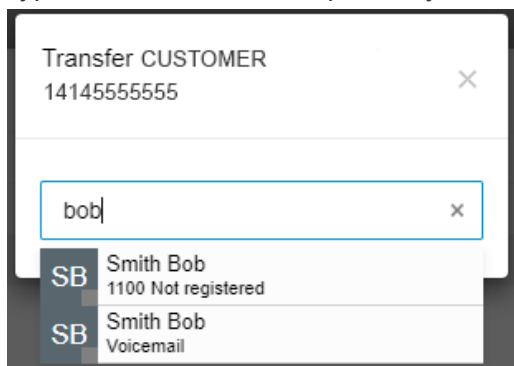
Caller	Callee	Queue	Time
 CUSTOMER 14145555555	Jane Dillon 1200		00:03

- Right click on Jane Dillon 1200 and select Transfer Customer

Caller	Callee	Queue	Time
 CUSTOMER 14145555555	Jane Dillon 1200		00:33

- Transfer CUSTOMER: 14145555555
- Park CUSTOMER: 14145555555
- Drop
- Record


- A popup window will appear
- Type in the name of the person you want to transfer the call to and then select the name




- The call has now been transferred

Attended Transfer - Dialer

To introduce a call before it is transferred.

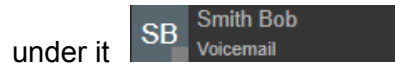
- When on a call, select the *Attended Transfer* icon  on the dialer
- Dial the extension or type in the name of the person you want to transfer the call to.
 - Results will appear. Select the name of the person
- Introduce the call

- Select the *Join* icon  that will now appear on the dialpad
- The call is transferred

Transferring a Call to voicemail - Dialer

To transfer a call directly to voicemail


- When on a call, select the *Transfer* icon on the dialer
- 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 with the word Voicemail




- The call is transferred


Transferring a Call to voicemail - Panel

Follow the steps below to transfer a call to voicemail through the Panel Web Client icon.

- Select the Panel icon on the left hand side menu 
- You should now see your phone call (ex below: Customer has called Jane)

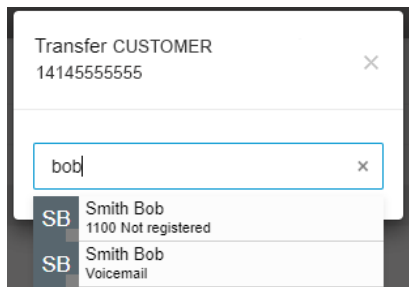
Caller	Callee	Queue	Time
 CUSTOMER 14145555555	Jane Dillon 1200		00:03

- Right click on Jane Dillon 1200 and select Transfer Customer

Caller	Callee	Queue	Time
 CUSTOMER 14145555555	Jane Dillon 1200		00:33

- Transfer CUSTOMER: 14145555555
- Park CUSTOMER: 14145555555
- Drop
- Record

- A popup window will appear
- Type in the name of the person you want to transfer the call to and then select the name with the word Voicemail underneath



- The call has now been transferred to the voicemail box

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.

Steps to Park a Call through Panel


Follow the steps below to park a call through the Panel Web Client icon. Below are the steps on how you can park a call and then pick up a parked call



- Select the Panel icon on the left hand side menu
- You should now see your phone call (ex below: Customer has called Jane)


Caller	Callee	Queue	Time
 CUSTOMER 1414555555	Jane Dillon 1200		00:03

- Right click on Jane Dillon 1200 and select Park Customer 1414555555 from the drop down

Caller	Callee	Queue	Time
 CUSTOMER 1414555555	Jane Dillon 1200		00:23

- Transfer CUSTOMER: 1414555555
- Park CUSTOMER: 1414555555**
- Drop
- Record

- You will see that the call has been parked on SP0


Caller	Callee	Queue	Time
 CUSTOMER 1414555555	SP0		00:01

Steps to pick up a Parked call through Panel

Follow the steps below to pick up a parked call through the Panel Web Client icon.



- Select the Panel icon on the left hand side menu
- Right click on call you want to pick up and select Unpark

Caller	Callee	Queue	Time
 CUSTOMER 14145555555	S Transfer CUSTOMER: 14145555555	-	00:06
	Unpark		
	Drop		

- The call has now been picked up

Conference Call

- While on a call, press the *Conference* icon within the dialer.
- This will place your call on hold and prepare you to dial a second call.
- Place your second call by dialing the phone number followed by the *Send* key. Once the new call is live the calls will be merged.

Web Client Icons

Below are the Web client icons and then the description of what each area offers.



Team

Team lists all users on the phone system



- You can see the status of a user
- Select the phone icon to call them
- Select the star icon to mark them as a favorite
- Select the 3 dots to use intercom or leave a voicemail


Chat

Located in the toolbar, Chat allows you to search and chat/share with other users on the system.

To start a chat

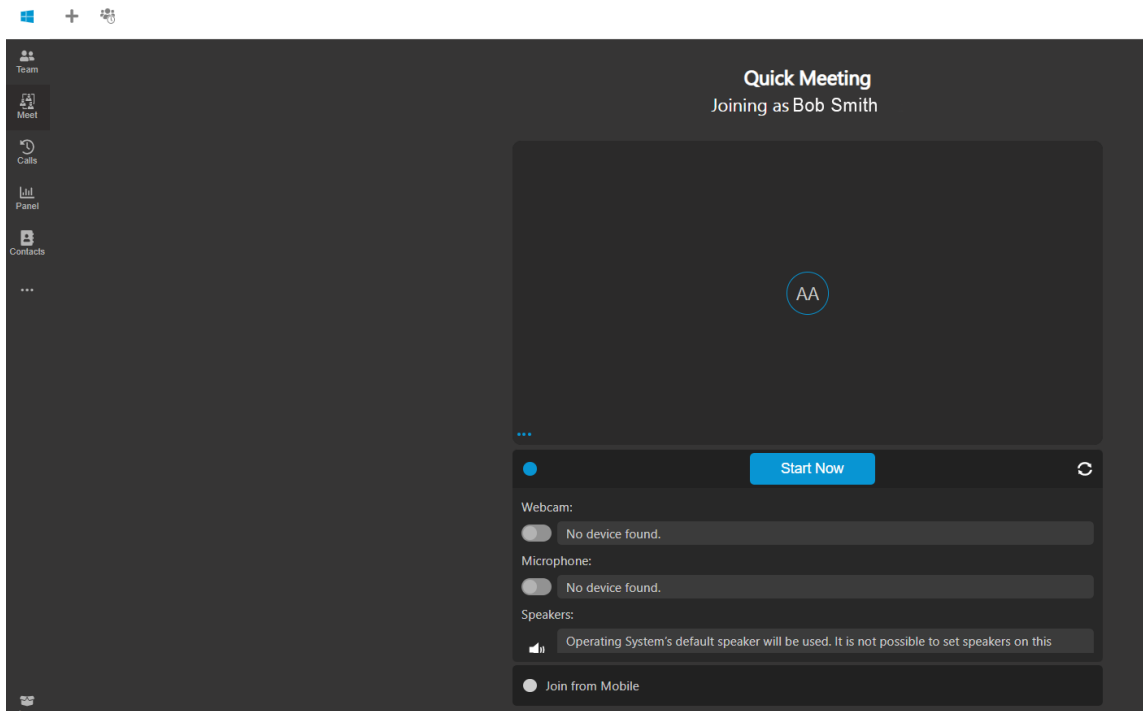
- To start a chat select the Chat icon and then the plus icon **+** in the upper left-hand corner

To pick up a chat

- Click on the chat conversation, then click on the Take  icon in the top right corner.
 - You will now be the sole owner of this conversation; other agents no longer have access to it.

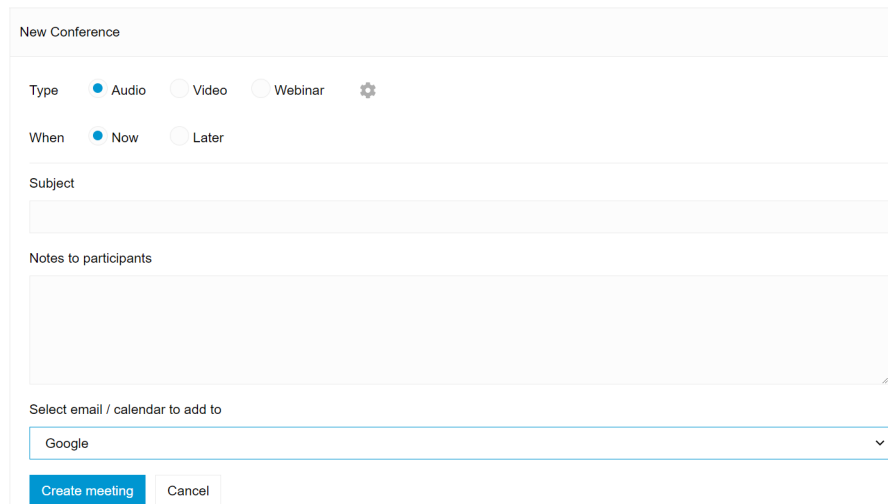
Meet

Meet is used to set up video conferencing. Your invitees can seamlessly join meetings with absolutely no login or sign up. All they need is your meeting link. They can join in-browser on Chrome or Firefox, or use one of the free video apps for Android or iOS.



Schedule a Web Meeting

- To schedule a conference select the Meet icon and then the plus icon **+** in the upper left-hand corner



New Conference

Type Audio Video Webinar

When Now Later

Subject

Notes to participants

Select email / calendar to add to

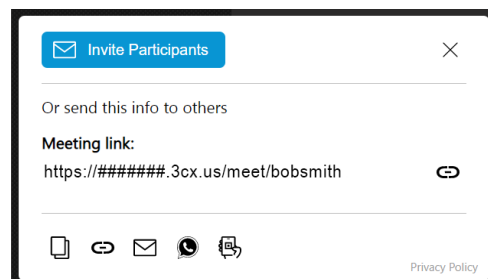
Google

Create meeting Cancel

- Fill in the appropriate information:
 - o Type: Audio, Video or Webinar
 - o When: Now or Later (Selecting later generates a date, time and duration field)
 - o Subject
 - o Notes to Participants
 - o Select email/Calendar to add the conference to
- Click “Create Meeting” and a new tab will open in which you can create the calendar event for your meeting and invite participants.
- Click “Save” or “Send” to schedule your meeting and invite participants.

Start a Web Meeting

- You may start a web meeting by pressing Start Now
- Locate the WebMeeting box in the bottom left corner of the web meeting window
 - o Select the Invite Participants button to add people
 - o Select the paperclip icon to copy the meeting link so you can send it to others
 - o Select the email icon to invite participants by email



- o Select the phone icon to invite participants by WhatsApp
- o Select the gears to adjust the settings

Below is the toolbar you can use throughout your meeting



- Time tracker for the meeting
- Add participant icon
- Mute/Unmute your audio
- Turn Camera On/Off
- Raise your hand icon
- Share your screen
- End the meeting
- Open chat within the meeting
- Current Participants icon
- Share content within the meeting
- Record the meeting
- Change the layout of the meeting screen
- Options available while in the meeting

Calls

Located in the toolbar, 'Call History' displays outgoing, incoming and missed calls. On any particular call in your call history, you may do the following

- Select the phone icon to call the party back
- Select the '+' icon to add them to your contacts
- Select the garbage can icon to delete the call from your history

Panel

The switchboard helps you view active and parked calls. There are several steps you can do from this screen. You can:

- Transfer/Park a Call and Pick Up a Transferred/Parked call (Detailed above under Transfer and Park Call)
- Drop the call - End the call
- Record the call - if enabled

Recording a Call

Approval is required to record phone calls. Contact your legal department to find out how recorded calls are to be announced.

Once you have approval to record a live call

- Go to the web client panel section
- Click on the call you want to record and select Record from the drop down option



All				
Caller	Callee	Queue	Time	Details
Bob Smith 1234	Jane Smith 1235		00:46	

- Transfer Jane Smith 1235
- Park Jane Smith 1235
- Drop
- Recording

To stop recording a call

- Once done with recording select the call within the panel and Select Stop Recording



All				
Caller	Callee	Queue	Time	Details
Bob Smith 1234	Jane Smith 1235		00:46	

- Transfer Jane Smith 1235
- Park Jane Smith 1235
- Drop
- Stop Recording

To locate the recording when finished

- Select the Additional Features icon on the left hand side
- Select Recordings
- On the next screen you will see a list of recordings detailing
 - Name
 - Date
 - Time
- You can then
 - Download the recording
 - Play the recording
 - Call back the party

Contacts

Located in the toolbar, 'Contacts' allows you to design a personal phone book by selecting, 'personal' and selecting the '+' button at the top. Fill in all of the necessary information and save by selecting the floppy disk icon located in the top right corner.

Additional Features

Voicemail

Voicemails will appear with the caller ID, the date, the time, and the length of the voicemail. The voicemail will also be transcribed for you to read. You have the option to:

- Download the voicemail
- Play the voicemail
- Call back the party
- Add the party to your contact list

Recordings

This is where your recordings will be stored

- On the next screen you will see a list of recordings detailing
 - Name
 - Date
 - Time
- You can then
 - Download the recording
 - Play the recording
 - Call back the party

Settings

- Change General settings such as passwords and theme
- Alter Chat settings
- Update Audio/Video settings
- Adjust your view of the web client
- Customize your statuses
- Update your voicemail greetings

Voicemail greetings

You will need to set up your voicemail greeting. In order to do that:

- Select Additional Settings on the toolbar and then Settings
- Select Greetings
- You can either record a greeting on this screen or you can upload a recorded greeting which would be a .wav file and assign it to a Status. Once assigned to a status that is the recording that will play when you are in that status.

The screenshot displays a settings interface for voicemail greetings. It is organized into five sections, each representing a status: Available, Away, Do not disturb, Desk Mode, and On A Business Trip. Each section contains a dropdown menu currently set to 'Play default', followed by three buttons: 'Upload', 'Download', and 'Play'.

To record a greeting

- Select the Record greeting button
- Name the greeting that will help identify that greeting. Ex: general greeting
- Select OK
- Your phone will ring and once you answer it you will be prompted to record your greeting and once done select the # key.
- To save the recording select 0
- After a few moments you can then go back to the Greetings screen and select the status that you would like that greeting to play and click on the down arrow
- You will receive a drop down list of your recorded greetings, select the one you would like applied.
- You are then all set.

If you need further assistance, please reach out to us at 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.