

3CX User Tips

Brief: The purpose of this document is to offer guidance to users of Spitfire-provided 3CX phone systems. This document is not intended as an exhaustive list of features and is subject to change. Some features will be based upon individual user permissions. All information is understood to be correct at the time of writing. For other telephony guides, please refer to <https://www.spitfire.co.uk/about/knowledge-base/>. For assistance, please contact Spitfire Support on 020 7501 3030 or via support@spitfire.co.uk. This document is **only** applicable to users on version 18.

The 3CX Web Client at a Glance


3CX describe the Web Client as: *“easy to use and combines all the features you need to efficiently communicate, collaborate and connect with colleagues, partners and customers, straight from your browser.”*

Logging on: Information on how to login to the 3CX Web Client is detailed within your **Welcome Email**. If you have lost your Welcome Email, you can contact either your Administrator or Spitfire Support who will be able to re-send this to you.

If you have already provisioned your extension on either the softphone or the Windows application, you can equally resend the credentials to yourself by navigating to: **Settings** and then **Resend Credentials**.

What can you use the Web Client for?

You can use the Web Client for many different features. The most common features have been detailed below with a brief explanation of the feature and how it can be used:

Feature	Explanation/How to use
Windows Desktop Client	<p>You can download the Windows Desktop Client, for use of the 3CX app on your desktop by pressing the Windows icon on the left-hand menu and following the instructions.</p> 

Place a Call

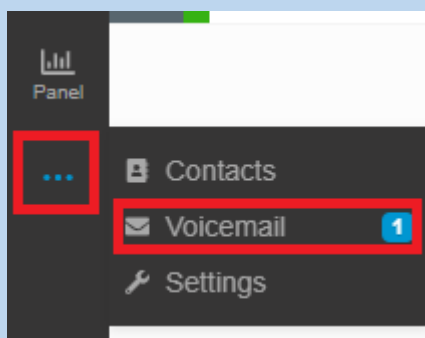
One of the key features of the **Web Client** or **Windows Desktop Client** is the ability to initiate a call via a number of different mediums. Once a call has been initiated you have the ability to also select from a number of different features such as: **Transfer**, **Conference**, **Record** and **Initiate a New Call**.

To place a call simply click the telephone icon, enter a telephone number or search via your **Contacts** and select the method by which you would like to place the call on the dropdown: **Deskphone**, **Browser Extension**, **Softphone** or **Windows Desktop Client**.



Voicemail

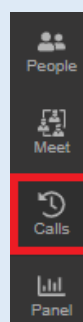
The **Web Client** or **Windows Desktop Client** also allows you to manage your voicemail from the browser. Simply navigate to the **Voicemail** tab:



From here you have the ability to: **Download**, **Listen**, **Callback** or **Delete**.

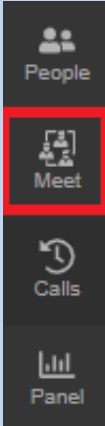
Call History

The **Web Client** or **Windows Desktop Client** provides you with the ability to view your personal call logs. This is obviously a key feature on most phone systems and can give you the ability to respond to missed calls. You can find this by navigating to the **Call History** tab.

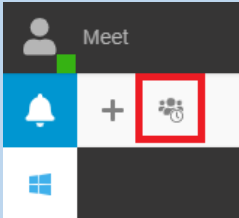


Conference/WebMeeting

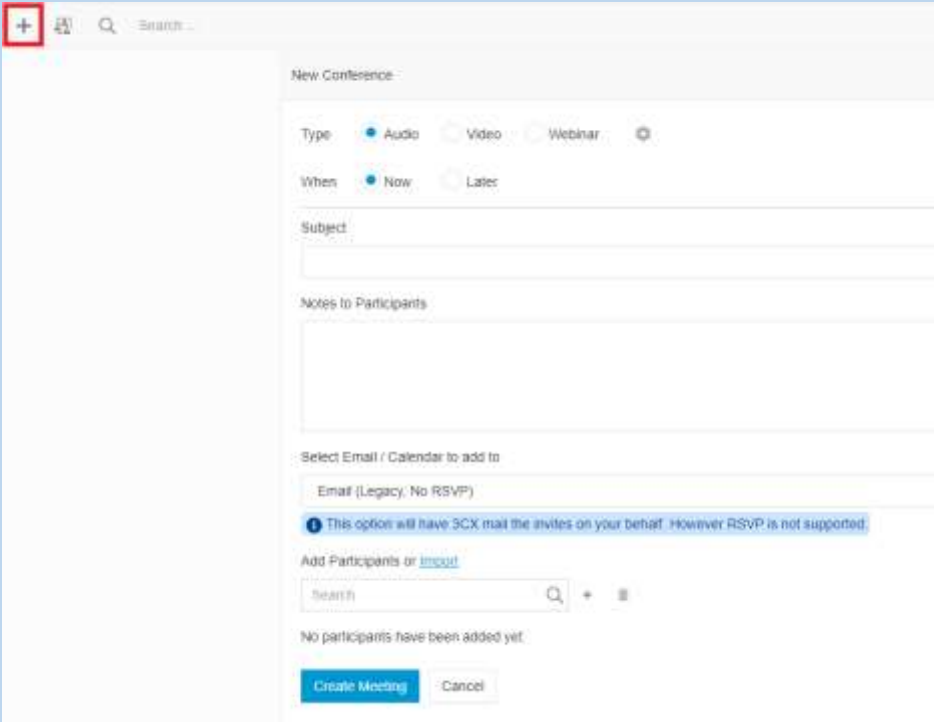
The **Meet** tab allows you to schedule video and conference calls with a number of participants.



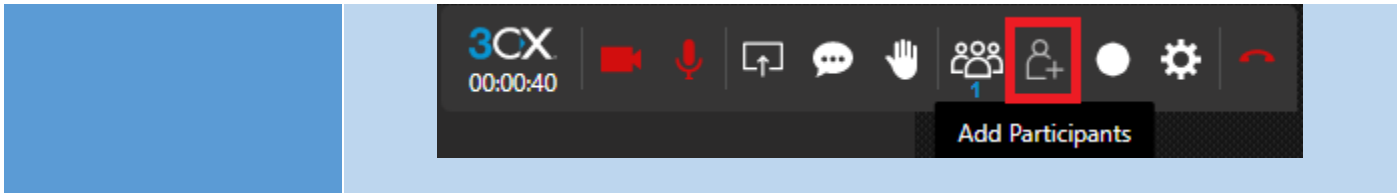
When navigating to this menu you will be able to either create an “ad-hoc” **Web Meeting** or you have the option to schedule a meeting. Simply change between the two using the highlighted button below:



Meetings can be scheduled by pressing the “plus” button and filling out the relevant details. If a recipient of an invite is using **Outlook** these will be automatically saved within their personal calendar.

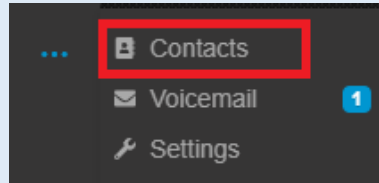


Simply press **Join Now** to start an “ad-hoc” meeting. You can invite participants by pressing the **Add Participants** button using any of the available options presented.



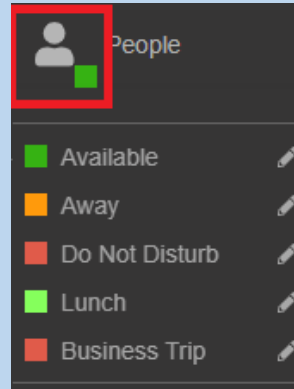
Contacts

The **Contacts** menu allows you to save common contacts to your own **phonebook** as well as view the global company **phonebook**. From here you can do many things such as: **Place a Call** or start a new **Chat**. Depending on your permissions, you can also add contacts to the **Global Directory** as well.

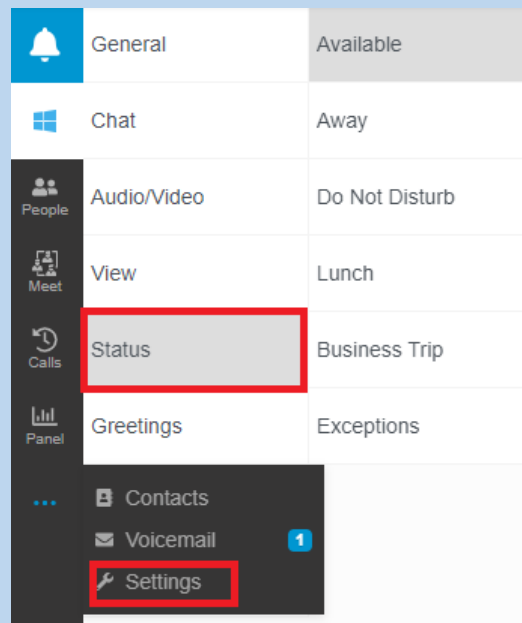


Status

The **Web Client** or **Windows Desktop Client** also gives you the ability to alter the **Status** of your extension. Whilst you can set a **Custom Status Message**, the default availability settings are: **Available**, **Away**, **Do Not Disturb**, **Lunch** and **Business Trip**. You can find the status options by selecting your user icon located at the top left of the page.



When set, you can also choose your own configuration options for that particular **Status**. These options can be found by navigating to **Settings** -> **Status** then select the relevant **Status** description. From here you can select a number of options such as **Divert Calls** or **Load a Customised Message**.



The 3CX Softphone App at a Glance


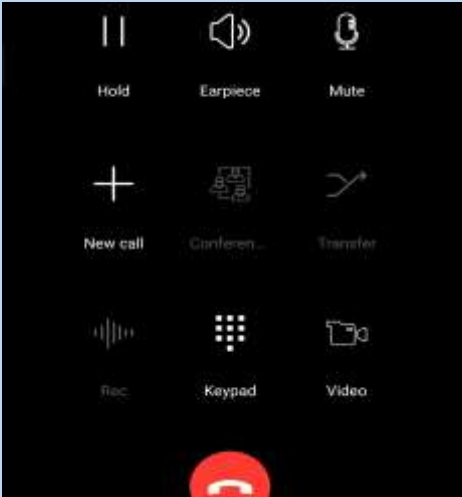
Provisioning: Similar to the 3CX Web Client, details on how to provision and use your extension on the softphone are detailed within your **Welcome Email**. When first opening the app on either **iOS** or **Android**, you will be prompted to scan a **QR Code**. Simply open up the **Welcome Email** and frame the **QR Code** included within using your mobile and your extension will be provisioned on your smartphone. Easy!

What can you use the 3CX Softphone App for?

The features available on the softphone application are essentially the same as those that can be used for the Web Client. The bonus here is the added flexibility of being able to do all this **on the go** and without the need to use your internet browser or computer. You can think of this as essentially having your physical desk phone loaded onto your mobile device.

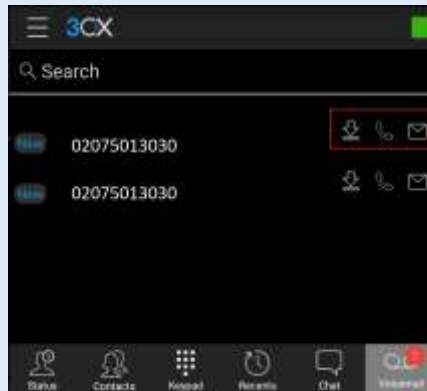
Important Note: To successfully receive calls on the softphone application, individual mobile phone settings should be taken into consideration. Specific permissions will need to be allowed within your mobile phone settings for features such as video calling, contacts and calling. You should also ensure that **PUSH** notifications are enabled for the 3CX app. VoIP calls are reliant on internet speed/bandwidth. Some form of internet connectivity is required for this to work.

Some of the more useful features of the app are listed below along with a brief explanation of the feature and how it can be used:

Feature	Explanation/How to use
Place a Call	<p>This feature is self-explanatory. Simply navigate to the Keypad and you can make calls from your smartphone whilst presenting a Company Number.</p>  <p>When on a call, you have access to exactly the same features as those on the Web Client: Transfer, Conference and Record to name a few.</p> 

Voicemail

The 3CX softphone app also provides a quick and easy way to manage your **Voicemail**. Simply navigate to the **Voicemail** menu on the far-right and you can: **Download, Listen, Callback** or **Delete**.



Chat

As with the **Web Client**, the mobile application has an **Instant Messaging** feature which allows you to send messages and documents to other internal extensions.

To access this feature, simply navigate to the **Chat** menu option.



Call History

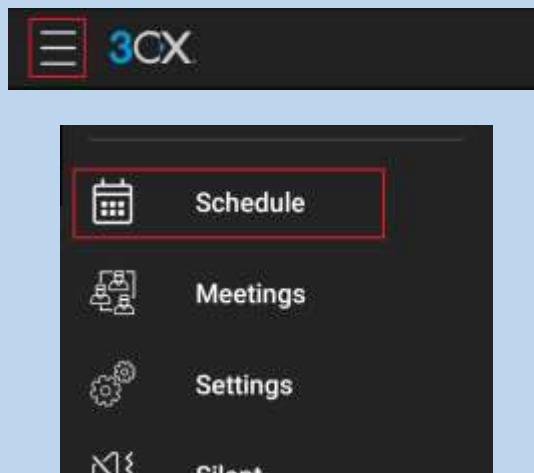
Self-explanatory. Navigate to the **Recents** menu option to view your **Call History**. From here you can view call logs and manage these entries.



Conference

You can schedule a conference call in much the same way as you can on the **Web Client**. The only difference is of course the method by which you schedule these.

Simply navigate to: the top left **Menu** button -> **Conference** -> **New**:



You can fill out the relevant information, add your participants and hit **Done**. To manage scheduled conferences, just navigate to the **Conference** menu on the bottom menu bar.

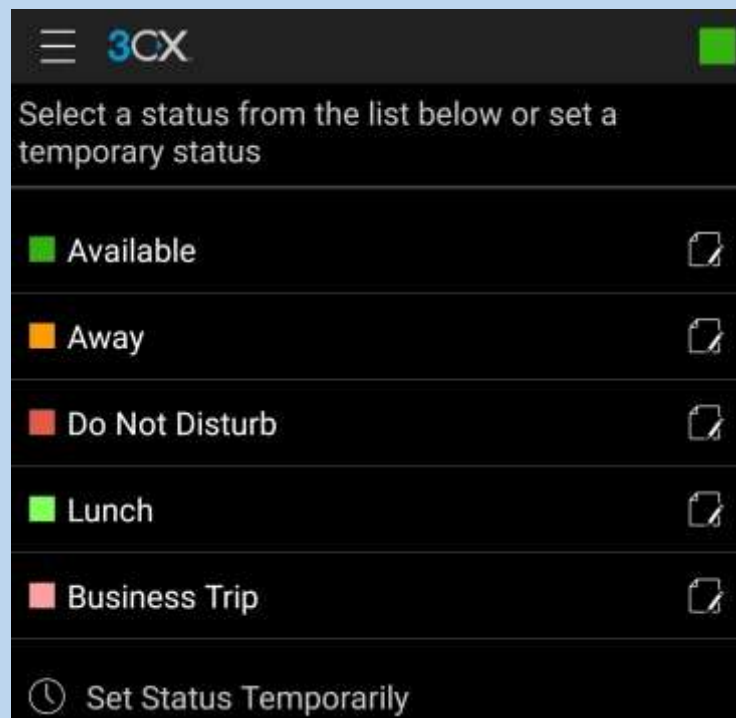
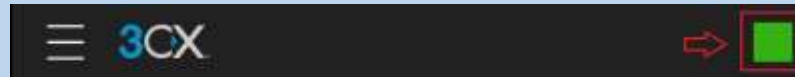
Contacts

Depending on the permissions that you have enabled on your mobile device, here you can find all your contacts in one place. You have the option to have **Company/Personal** contact entries as well as importing the contacts that are stored on your own mobile device.



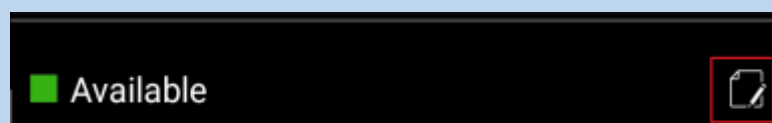
Status

The 3CX application also allows you to manually set your **status**. Simply tap the **Status** indicator and select from one of the available options. From here you can either permanently change the extension **Status** or set it to update automatically back to default as required by selecting **Set Status Temporarily**.



You can team this up with the **Web Client** and have specific call-flow options pre-configured to suit your requirements.

Whilst the **Web Client** is probably the easiest way to configure extension level call-flow options you can similarly do this on the app by pressing the **Edit** button next to the relevant Status option.



Deactivate / Delete

Occasionally, you may wish to stop receiving calls via the softphone application. You can disable this by: pressing the **menu** icon on the top left -> pressing the icon at the top of the menu pane -> pressing and holding the top text portion. You will then be presented with the option to either **delete** or **de-activate** the account loaded onto your softphone.

Note: This will not delete the extension from the phone system. This purely involves the account settings on the device using the 3CX application.

Dial/Feature Code Cheat Sheet

Dial/feature codes are essentially codes that you can dial to access functions within the phone system directly from your phone. These can be utilised from any device where your extension is provisioned and can be a useful workaround should you run into some problem using the more accessible interface.

Please note: that these are not hard-set and could differ depending on the implementation. Please contact Spitfire Support if you have any questions.

Some of the more useful ones are detailed below:

Dial/Feature Code	Explanation/How to use
20	Call Pickup. Simply dial *20* and you will be able to answer the longest ringing call.
*3[0-4]	Status Change. As detailed above, 3CX has the Status concept. This is fairly powerful in controlling how your own extension rings manually at any “in hours” time. Simply dial *3 followed by one of the following options: 0 – Available 1 – Away 2 – Do Not Disturb 3 – Lunch 4 – Business Trip An example use would be setting up particular call flows using the Web Client and then being able to modify your status quickly on the go using your softphone.
*62 / *63	Log in and out of call queues. Dial the following: - *62 to log your extension in to a call queue - *63 to log your extension out of a call queue.
*4[<i>extension number</i>]	Voicemail. You can use this feature in one of two ways: <u>Send call directly to voicemail</u> Simply dial *4 followed by the relevant extension number (<i>for example, *4100 would send the call to the voicemail of extension 100</i>). This is a feature that you can use when transferring a call. <u>Access your voicemail</u> Simply dial *4 to be prompted for your voicemail Personal Identification Number (PIN). Enter your PIN and you will be prompted with the main voicemail menu. From here you can use various options to manage your voicemails such as Listen, Save, Delete, or Record a new Greeting.

For other telephony guides, please refer to <https://www.spitfire.co.uk/about/knowledge-base/>. For assistance please contact Spitfire Support on 020 7501 3030 or via support@spitfire.co.uk.