



breakfree
with a software based PBX for Windows



User Manual

**3CX VOIP client, User portal & Voice
mail for 3CX Phone System**

Version 5.0

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Introduction to 3CX Phone System

What is 3CX Phone System for Windows?

3CX Phone System is a software-based IP PBX that replaces a traditional PBX / telephone system. 3CX Phone System sends calls as data packets over the computer data network instead of via the traditional phone network. Phones share the network with computers and separate phone wiring can therefore be eliminated.

With the use of a VOIP gateway, you can connect existing phone lines to the IP PBX and make and receive phone calls via a regular PSTN line.

Benefits to an extension user

3CX Phone System delivers numerous benefits to a user of the system:

- Ability to answer and make calls from anywhere, even outside of the office
- Easy extension management using a browser
- Ability to quickly view presence (extension status) of other users
- Ability to view status of incoming lines
- Ability to view number of callers in queue
- Ability to receive your voice mail and faxes in your e-mail inbox
- View your entire call history with a few mouse-clicks
- Quickly launch missed calls
- View an automatically updated extension number list
- Transfer incoming calls to any user with a few mouse clicks

The 3CX VOIP client

What is the 3CX VOIP client?

The 3CX VOIP Client is a small Windows application that allows you to make and receive calls via your desktop phone or using a headset connected directly to your computer.

You can see the extension numbers of other users and whether they are available to take calls. Important is that you can use the 3CX VOIP client without having to use the headset: you can continue to use your desk based phone if you prefer.

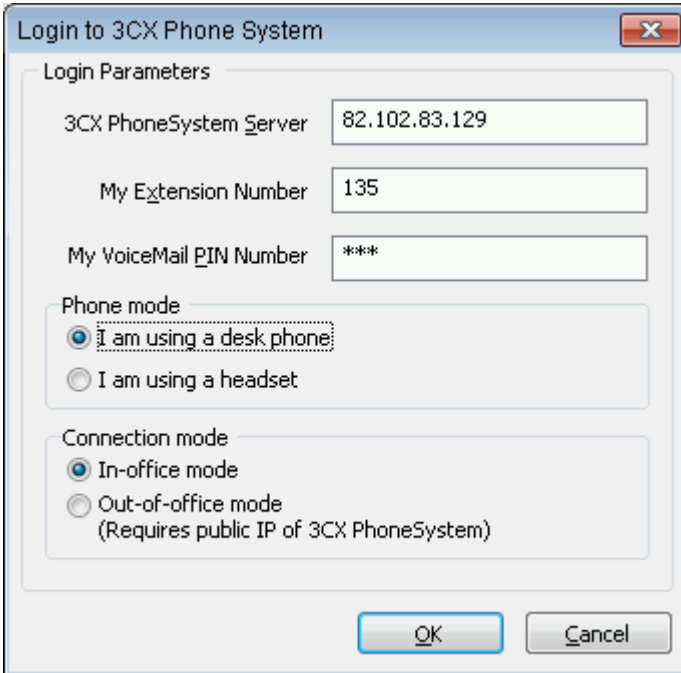
The 3CX VOIP client ships with all editions of 3CX Phone System, including the Free edition. However, in the Small Business, Pro and Enterprise editions, the 3CX VOIP client allows you to see the presence of other users on the phone system. In the FREE edition, other extensions appear greyed out.

Installing 3CX VOIP client

The 3CX VOIP client is a small application and is easy install:

1. Download the latest 3CX VOIP client from <http://www.3cx.com/downloads/3cxvoipclient.msi>
2. Click 'Run' to execute the setup process. You will be prompted to select a location.
3. You will be prompted whether you wish to install 3CX VPN, which allows you to easily & securely make and receive calls from outside the office. If you plan to use 3CX VOIP client from outside the office, click yes to install the VPN drivers. If in doubt consult your administrator.
4. The files will be copied. Click Finish to complete installation.

Running 3CX VOIP client



Login to 3CX Phone System

Login Parameters

3CX PhoneSystem Server 82.102.83.129

My Extension Number 135

My VoiceMail PIN Number ***

Phone mode

I am using a desk phone

I am using a headset

Connection mode

In-office mode

Out-of-office mode
(Requires public IP of 3CX PhoneSystem)

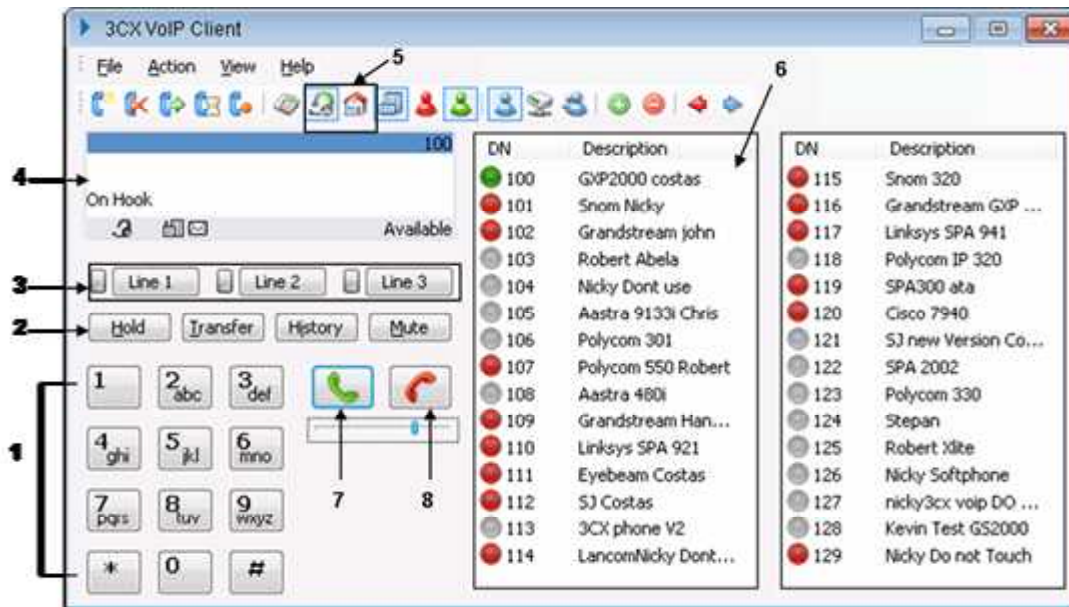
OK Cancel

Screenshot 1 – Login to 3CX Phone System

Now start 3CX VOIP client from the 3CX VOIP Client program group. The first time you start it, you will be prompted for your extension number and Voice mail pin number, as well as the server name. By default, your voice mail pin number is identical to your extension. You can change this later if you wish.

1. Now select whether you are using a desk phone, or whether you are using a headset connected directly to your computer. In this case, 3CX VOIP client will act as a complete software SIP phone.
2. Specify whether you are connecting from inside the office or from outside the office. If outside the office, 3CX VOIP client will use the built in VPN to easily traverse firewalls.
3. Click OK to start 3CX VOIP client. Once you have logged in successfully, your extension number will be shown in the phone screen.

Using the 3CX VOIP client as a SIP phone




Screenshot 2 - 3CX VOIP client in SIP phone mode

- | | |
|--------------------|-----------------|
| 1. Dial Pad | 5. Phone modes |
| 2. Phone functions | 6. Status panel |
| 3. Lines | 7. Dial |
| 4. Status screen | 8. Hang up |

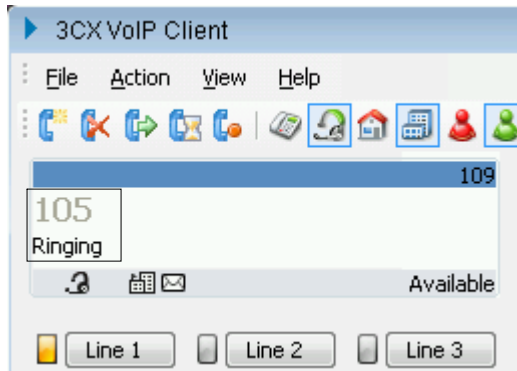
If you selected to use 3CX VOIP client with a head set, then the 3CX VOIP client will work as a SIP Phone, and the interface will resemble a phone.

Making calls

To make a call, simply dial the number on the keypad using your mouse, or enter the number using your keypad. Click the green button  or hit the enter key to instruct the phone to dial the number. 3CX VOIP client will make the call on the first available line.


Answering Calls


As soon as a call comes in, 3CX VOIP client will ring and show the incoming call on the screen of the phone. It will also pop up a small dialog in the system tray informing you of the new call.



Screenshot 3 – Answering Calls

The incoming call will light up the LED on the first available line.

To answer the call, click on the answer button  or hit the 'Enter' key. If you already have a call active, the call will be received on the second line, and the LED on the second line will flash. To answer this call, click on the line 2 button first. Your call on line 1 will automatically be put on hold and the LED on line 1 will flash.



If you wish to reject a call, click on the red hang-up button  or hit the 'Escape' key. The caller will then be treated as if your phone was busy. The forwarding settings for 'Call Busy' will be performed.

You can answer a call by hitting the “Enter” key, or cancel a call by hitting the “Escape” key

Transferring calls

Blind transfer

A blind transfer transfers the call to another extension without first speaking to the target extension. To perform a blind transfer:

1. Click on the transfer button 
2. Dial the destination number or double-click on the extension in the status panel and click on the dial button  or hit the 'Enter' key.

Attended transfer

An attended transfer is performed by first calling the target extension and speaking to the person who is to take the call. To perform an attended transfer:

1. Click on the 'Line 2' button and dial the number of the extension you wish to reach. Alternatively double-click on the extension in the status panel. The call on 'Line 1' will automatically be put on hold.
2. After you have introduced the caller to the user of the extension, click on the transfer button and click on 'Line 1' to connect both extensions.

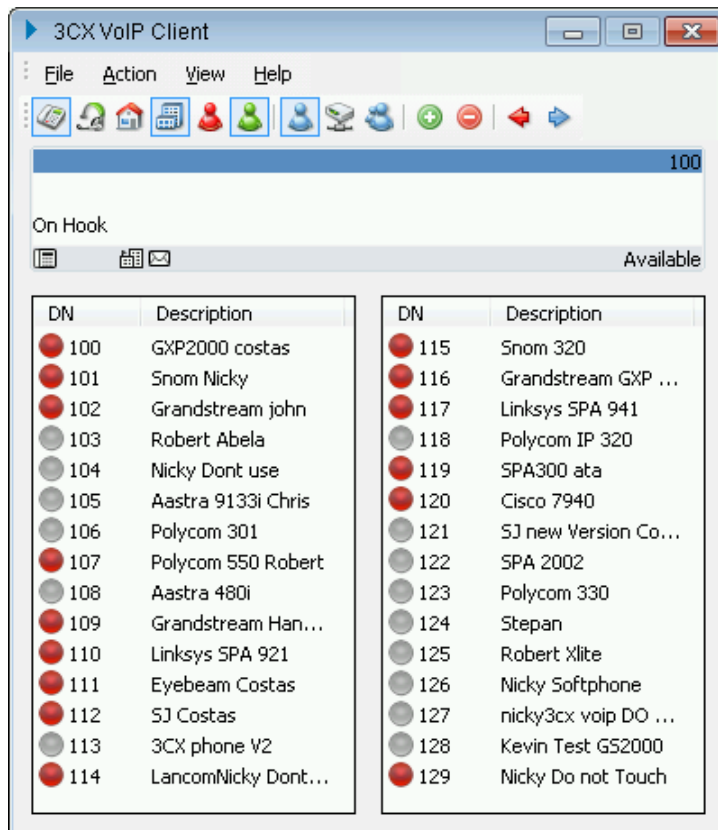
Recording a call



Screenshot 4 – Recording a call

You can record a call simply by clicking on the record call button. This will record the current call in progress and save it as a wav file on the server.

Using 3CX VOIP client with a desk phone



Screenshot 5 – Using the VOIP client as a desk phone

If you selected to use 3CX VOIP client with a desk phone, the interface will not have a dial pad – all phone calls will be made and received via your desk phone. However, you can see the status of other users on the phone system, as well as monitor extension status via the status screen.

Status screen



1. Extension number
2. Soft Phone/Desktop mode
3. In office/Out of office mode
4. Voicemail
5. Available/Away

Screenshot 6 – Status Screen

The status screen on the phone summarizes important information. It shows

- Your extension number and name
- If you have voice mail waiting and if so, how many
- Whether you are using a desk phone or using the client as a SIP phone
- Whether your phone is set to 'in the office' or 'out of the office' mode
- Whether your status is set to 'Available' or 'Away'

Furthermore, when you make or receive a call, the number to be dialled OR the caller ID of the caller is shown in the middle of the status screen. Just below it you will get information messages about the progress of the call.

Extension, Line & Queue Status

3CX VOIP client has an 'Operator panel' which allows you to see the status of other users. In the FREE edition, other extensions will appear as greyed out. Presence information is only available in the commercial editions.



Screenshot 7 - Presence filter buttons

By default all extensions, lines and queues are listed, however you can filter them using the tool bar buttons.



Screenshot 8 - Adding / Removing columns

You can expand the operator panel to more than one column using the plus and minus buttons in the toolbar.



Screenshot 9 - Skip to remaining extensions

If you do not want to expand the columns, and not all the extensions fit, you can click on the arrow buttons to browse the remaining extensions in the last available column.

Logging into a Call Queue

Call queues allow calls to be queued in case all agents are busy. The actual configuration of who is an agent for a particular Call Queue is done from the 3CX management console. However, if you are an agent for a queue, you need to login to the queue to actually start taking calls. This avoids calls being sent to your extension without you being available.

To login to all Call Queues that you are a member of, select Action > Queue > Login to all Queues from the Menu. From that point onwards you will be routed calls as they come into the queue.

Specifying Away/Available status



Screenshot 10 – Specifying Away status

If you temporarily can not answer the phone, you can specify that you are 'Away'. This will show your colleagues that you are not in a position to answer calls, as well as handle any calls according to the "Phone busy" setting configured for your extension.

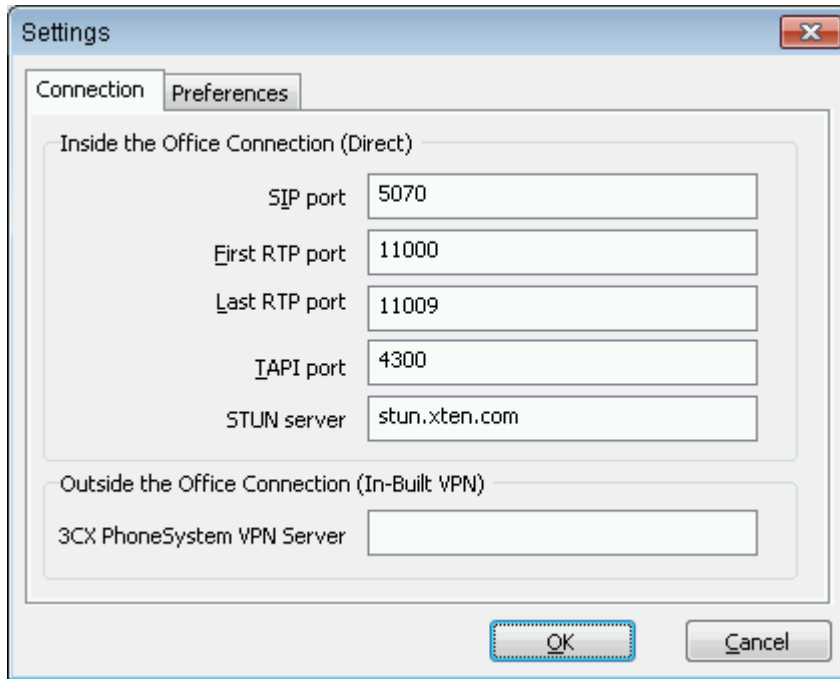
To set your extension status, select "Available" or "Away" from the toolbar. Note that this setting will persist even if you shut down 3CX VOIP client!

Calling from In side / Outside of the office

3CX VOIP client can be used from both inside and outside the office. If you are out side the office, you often have to traverse firewalls and therefore it's best to use the 3CX Outside office mode. This will cause 3CX VOIP client to use the inbuilt VPN.


Before you can use the 'Outside the office' mode, you must specify the public IP of the 3CX Phone System server in the Connection dialog:

1. Select File > Settings from the menu



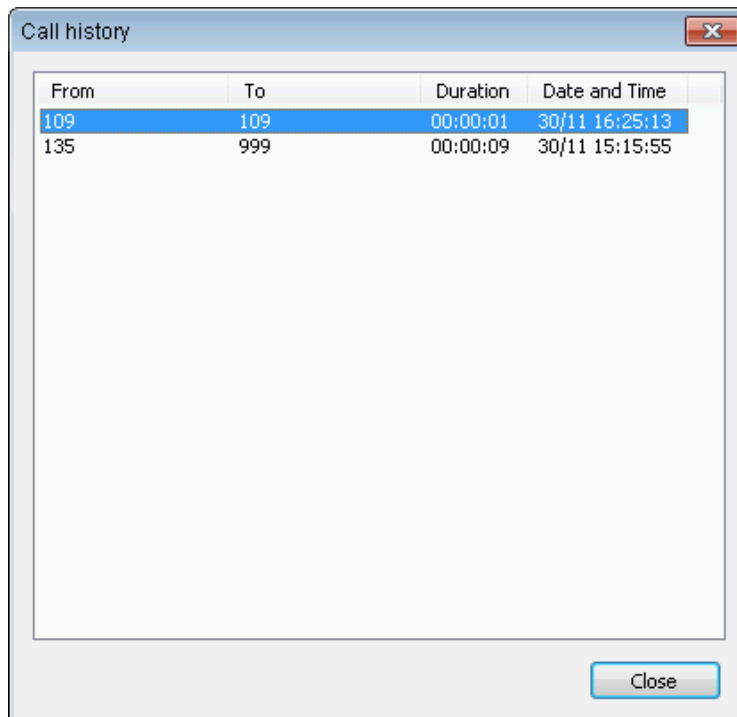
Screenshot 11 –Settings for Using Outside of the Office Connection

2. In the Connection dialog, specify the public IP of 3CX Phone System in the 'Outside the office Connection' section. If in doubt, contact your administrator.

To switch to 'Outside the office mode' click on the button in the toolbar  or select 'Action > Location > Out side the office' from the menu.

The connection will be re-established with or without the VPN client depending on the option you selected.

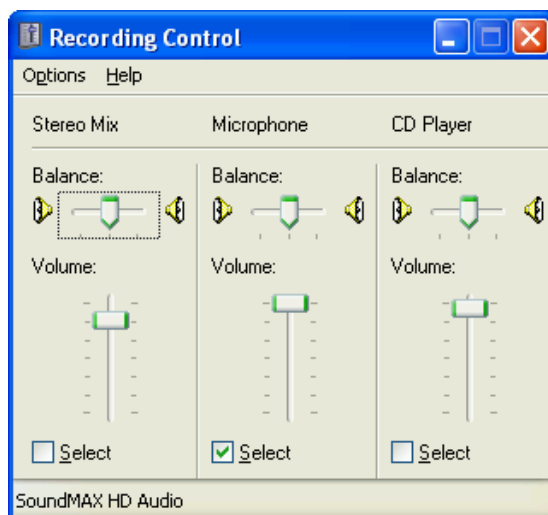
Call History



Screenshot 12 – Viewing Call History

You can view the history of calls received and placed by clicking on the 'History' button. To place a call to a number in the call history, simply double-click on the number to launch a call to that number.

Adjusting Microphone level



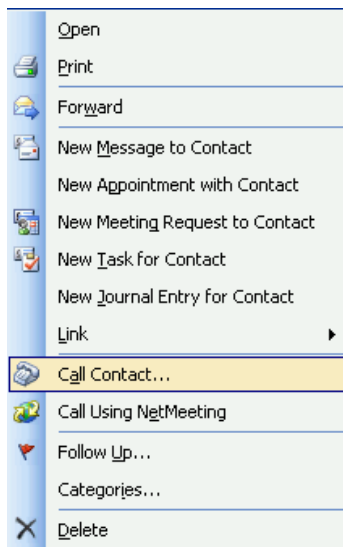
Screenshot 13 - Adjusting the Microphone level

The microphone audio level is set by the sound card driver in Windows. To adjust it:

1. Go to Windows Control Panel and double click on 'Sounds and Audio Devices'. In the Audio tab, click on the Volume button in the Sound Recording section, then use the sliders to adjust the microphone recording level.
2. Alternatively, double click the speaker icon in the Windows taskbar. Go to Properties and from the Mixer device drop down menu select an Input device, click on OK to continue. Moving the sliders up or down will adjust the microphone recording level accordingly.

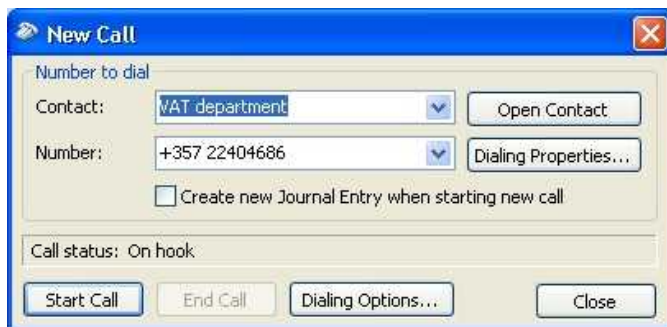
Launching calls from Microsoft Outlook

If you use Microsoft Outlook or any TAPI compliant application, and store all your phone numbers in Outlook contacts, you can easily launch calls directly from Outlook. To do this:



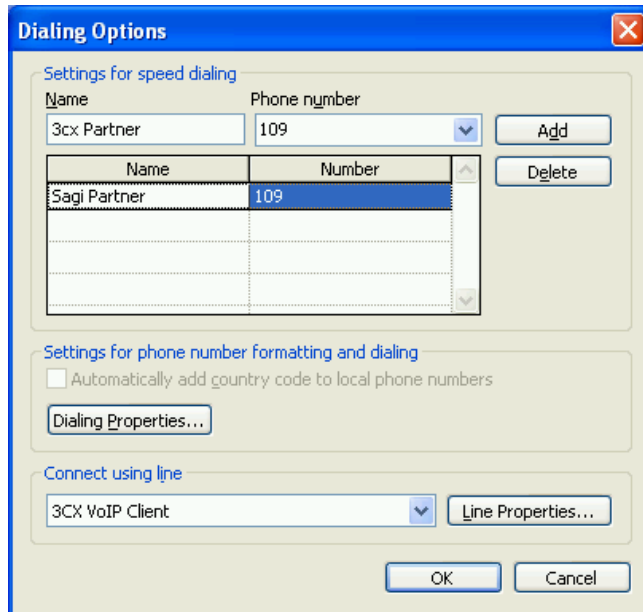
Screenshot 14 - Right click on a contact

1. Right click on the contact in Microsoft Outlook, and select 'Call contact'



Screenshot 15 - Microsoft Outlook New Call dialog

2. The Microsoft Outlook New Call dialog will appear. The first time you use the Microsoft Outlook integration, click on 'Dialing Options'



Screenshot 16 - The Dialing Options dialog

3. In the section 'Connect using line', select the entry 3CX VoIP Client. Click OK to exit the dialog.

4. Now you can click the start call button. The call will be launched using the 3CX VOIP client.

Note: If you are using the 'Desk phone mode', then the call will be set-up to your desk phone.

Settings

Preferences

The preferences dialog allows you to set your 3CX VOIP client preferences. You can change your extension options by clicking on the 'Extension options' button. This will launch your default browser and connect the 3CX Phone System User portal.

You can also configure start-up options for 3CX VOIP client:

- Tick the option "Log me in automatically" so that 3CX VOIP client will use the last entered credentials to login automatically to 3CX Phone System.
- Tick the option "Automatically start 3CX VOIP client when Windows starts", so that 3CX VOIP client will automatically run in the System Tray each time Windows starts.
- Tick the option "Bring 3CX VOIP client to the front upon receiving a call", so that you can easily answer incoming calls.

Connection

The connection dialog specifies how 3CX VOIP client should connect to 3CX Phone system. It has 2 methods to do this:

- Inside the office – Connection will take place using the port settings specified in the dialog. You can leave the defaults. You will need to specify the Internal IP of the 3CX Phone System server.
- Outside the office – Connection will take place via the VPN. All traffic will be tunnelled over the specified port. You will need to specify the Public IP of the 3CX Phone System server.

Voice Mail

Introduction

If you are unavailable to take a call, 3CX Phone System can record a message from the caller. These messages can be heard in the following ways:

- You can have the voice mail message emailed to you as a WAV attachment which can be played by Windows media player.
- You can have a notification message emailed to you so that you can dial the voice mail system and listen to the voice mail by phone.
- You can retrieve the voice mail by dialling 999 (default voice mail extension)

3CX Phone System realizes the concept of a unified messaging system, in which the user only needs to check his email inbox for email, voice and fax messages.

Retrieving voice mail by phone

To retrieve your voice mail by phone:

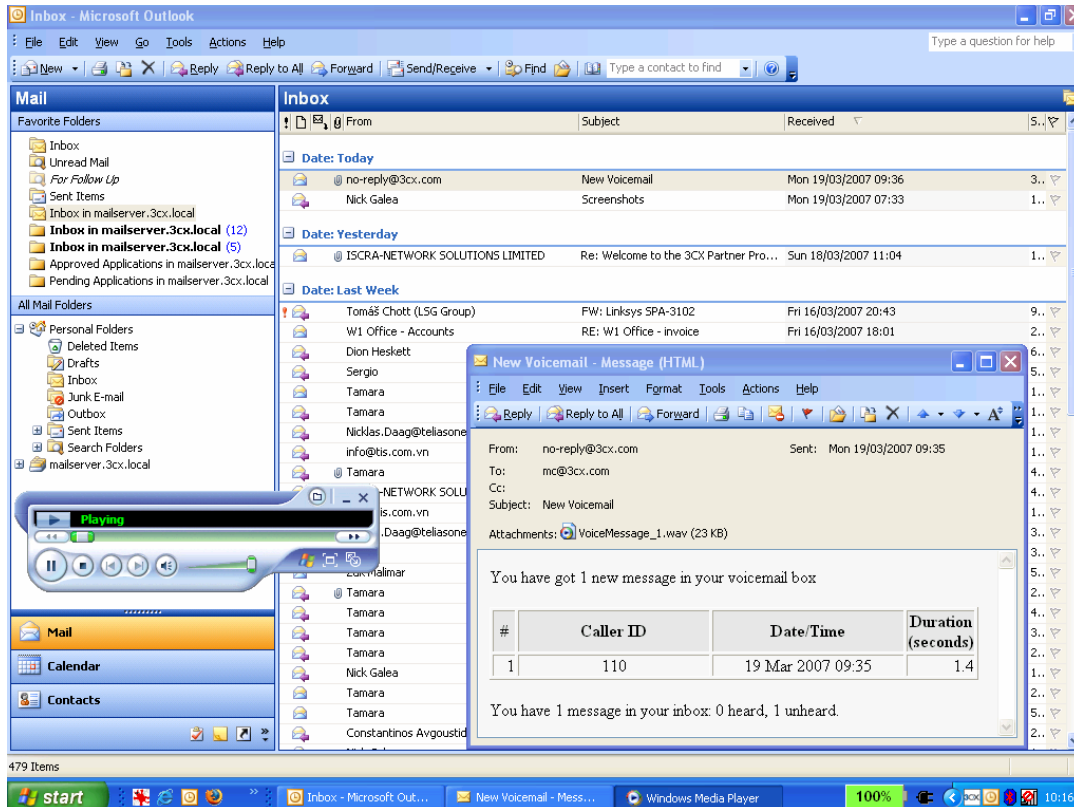
1. Dial the voice mail system extension - 999. If you are outside the company, you can dial this number from any digital receptionist menu.
2. Enter your extension number and when prompted your pin number. Press pound #
3. A prompt will be played with the number of read and unread messages in your voice mailbox.
4. Press * to play your unread messages.
5. During playback of voice mail, you have these options:
 - 0 - Skip to the next message
 - 1 - Skip to the previous message.
 - 2 - Repeat current message.
 - 3 - Delete the current message and automatically go to the next message.
 - 9 - To go to the Voice mail options menu
 - # - To hang up the call
6. Voice mail options menu

The voice mail options menu allows you to configure pin code and delete all read messages. It can be reached by entering 9 during message playback. The following options are valid:

- 4 - to delete all messages

- 6 - To play mailbox information
- 7 - To change pin number
- 8 - To change your voice mail greeting
- 9 - To repeat the prompt
- # - To exit the call

Receiving voice mail in your email inbox



Screenshot 17 - Receiving voice mail in your inbox

If your system is setup to attach the voice mail to your email, simply open up the email and double-click on the attachment. The voice mail has been attached in the wav format, so it will automatically be opened and played in media player.

The User Portal

Introduction

The user portal allows users to modify their extensions options. For example the user can configure what the phone system should do if he/she is unavailable, on a call or away from the office.

Note: The user portal is only available in commercial editions of 3CX Phone System.

Logging in

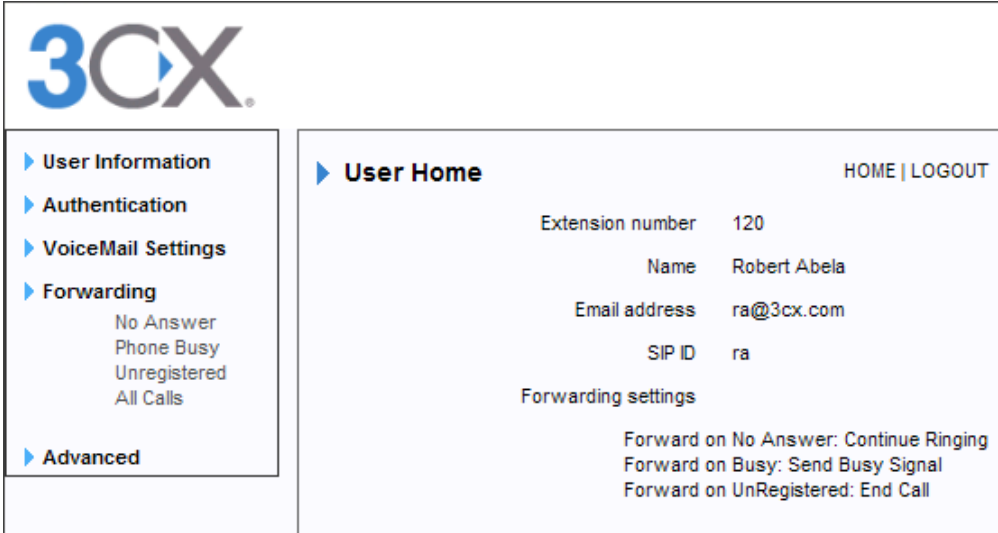


The screenshot shows the 3CX Phone System user portal login interface. At the top left is the 3CX logo. To the right, it says "3CX Phone System v5.0.3477.0". Below this, there are three input fields: "Language" with a dropdown menu set to "English", "Extension number" with the value "120", and "Pin number" with three dots. A "Login" button is positioned below the pin number field.

Screenshot 18 - Portal login

To login to the user portal:

1. Launch your web browser and navigate to:
<http://<phone-system>:5481/myphone/>
2. Specify your extension number and PIN and click 'Login'

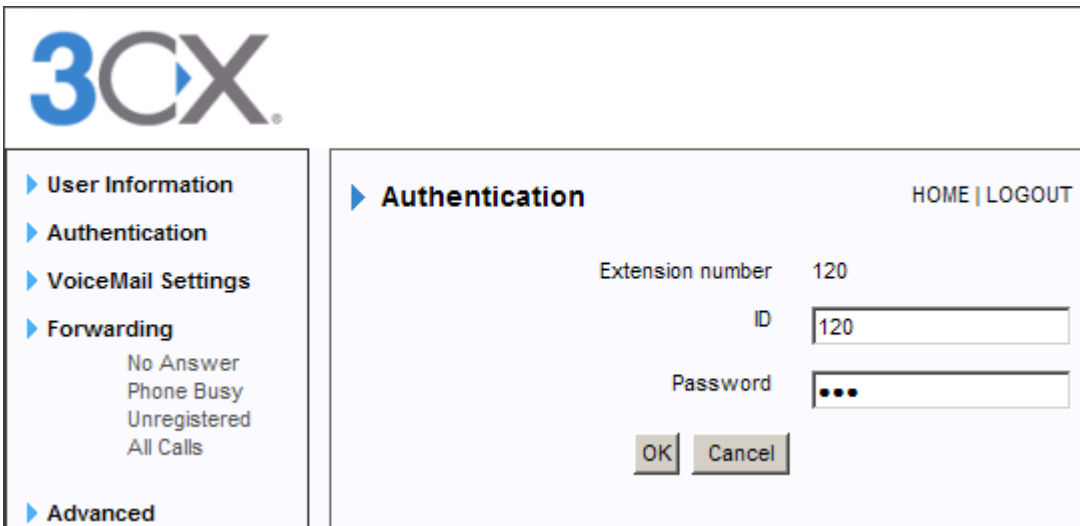


The screenshot shows the 3CX user portal main page. On the left is a navigation menu with the following items: User Information, Authentication, VoiceMail Settings, Forwarding (with sub-items: No Answer, Phone Busy, Unregistered, All Calls), and Advanced. The main content area is titled 'User Home' and includes a 'HOME | LOGOUT' link. It displays the following user information: Extension number 120, Name Robert Abela, Email address ra@3cx.com, and SIP ID ra. Below this is a 'Forwarding settings' section with three options: Forward on No Answer: Continue Ringing, Forward on Busy: Send Busy Signal, and Forward on UnRegistered: End Call.

Screenshot 19 - Portal main page

3. After successful login, your current settings will be shown on the right hand side

Authentication options



The screenshot shows the 3CX user portal authentication settings page. The navigation menu on the left is the same as in Screenshot 19, but 'Authentication' is now selected. The main content area is titled 'Authentication' and includes a 'HOME | LOGOUT' link. It displays the following information: Extension number 120, ID 120 (in a text input field), and Password (in a masked text input field). At the bottom are 'OK' and 'Cancel' buttons.

Screenshot 20 - Authentication details

1. SIP phones require an authentication ID and password to be able to make and receive calls. You can change the authentication ID and password in this dialog.

Note: Any changes to the authentication ID and password will require your SIP desk phone or soft phone to be updated as well. Do not change authentication ID and password without consulting your administrator!

Voice Mail

The Voice Mail page allows you to configure options that relate to the Voice mail function.

3CX

▶ User Information
▶ Authentication
▶ **VoiceMail Settings**
▶ Forwarding
 No Answer
 Phone Busy
 Unregistered
 All Calls
▶ Advanced

VoiceMail Settings HOME | LOGOUT

Extension number 120

Enable voice mail

Play Caller ID

Read out date/time of message

Email options

Pin number

OK Cancel

Screenshot 21 - Voice Mail options

You can configure the following options:

- Enable or disable Voice Mail
- Play Caller ID of person who left the voice mail
- Specify date format
- Specify whether you want to have voice mail delivered via email or not.
- Optionally change your PIN. (This PIN is used to login to the portal as well)

Forwarding

3CX

▶ User Information
▶ Authentication
▶ VoiceMail Settings
▶ **Forwarding**
 No Answer
 Phone Busy
 Unregistered
 All Calls
▶ Advanced

No Answer HOME | LOGOUT

Extension number 120

No Answer After (seconds)

Continue Ringing
 End Call
 Forward to Voice Mail
 Forward to Extension
 Forward to Queue / Ring Group
 Forward to Digital Receptionist
 Forward to Outside Number

OK Cancel

Screenshot 22 - No answer options

You can configure what 3CX phone system should do if you do not answer the call, if you are busy or if your phone is 'unregistered' (for example when you have not switched on your SIP phone).

You have the following re-direction options for each of the possible events;

- Continue ringing – the system will do nothing.
- End Call
- Forward to voice mail
- Forward to extension –Specify the extension to forward to in the list box.
- Forward to Queue/ring group – Specify the virtual extension number of the ring group or queue in the list box.
- Forward to Digital Receptionist – Specify the virtual extension number of the digital receptionist in the list box.
- Forward to Outside number – In this case the system will forward the call to an outside number. Be sure to include the complete dial string **including the prefix**.

The Forward all calls option is used when a user is temporarily out of the office, for example on holiday.

Important notes

- In the case of 'No Answer' you have to specify the time in seconds that you want the system to wait.
- In the case of 'Busy', you have to specify whether you want the phone or the PBX to do the busy signaling. By default, most SIP phones do not give a busy signal back, but accept a second incoming call. If you want to redirect a call when you are on the phone, you will need to specify "Use PBX status" in the busy detection list box.

Advanced

The screenshot displays the 3CX Advanced settings configuration page. On the left, a sidebar lists navigation options: User Information, Authentication, VoiceMail Settings, Forwarding (with sub-items: No Answer, Phone Busy, Unregistered, All Calls), and Advanced. The main content area is titled 'Advanced' and includes the following fields:

- Extension number: 120
- User Status: Away (dropdown menu)
- Queues Status: Logged Out (dropdown menu)
- Outbound caller ID: Robert Abela (text input)

At the bottom of the main content area, there are 'OK' and 'Cancel' buttons. In the top right corner of the main content area, there are links for 'HOME' and 'LOGOUT'.

Screenshot 23 - Advanced options

The advanced page allows you to configure following options:

- Whether you are available to take calls or not. If you set your status to away, calls will be treated by the PBX as if your extension is busy.
- You can login and logout of the Queues. To receive calls from any of the queues, you must be logged in to the queues.
- You can set your outbound caller ID. Note that not all VOIP providers will respect this setting, and will replace it with the actual number for legal reasons. Consult administrator for more information.

Dial codes

Introduction

Dial codes are particular key/number combinations used to access particular functions within the phone system.

Call pick-up

If you hear a particular extension ringing, and you know that person is not able to take the call, you can take the call using the 'Call Pickup' feature. To do this, type

*20 <extension number> followed by the send key.

This will redirect the active call to your extension.

Call Park

If you wish to "park" a call and then pick up the call from another extension:

*00-9 – to park the call

*10-9 – to pick up a parked call.

For example, type *00 to park the call in 'parking lot' 0, and then *10 to pick up the call from parking lot zero.

Parking lots support parking of multiple calls. Therefore, when un-parking, you can add the extension number from which the call was parked to be sure that you un-park the particular call you had parked there.

Note: Call Pickup and Call Park are only available in commercial editions of 3CX Phone System