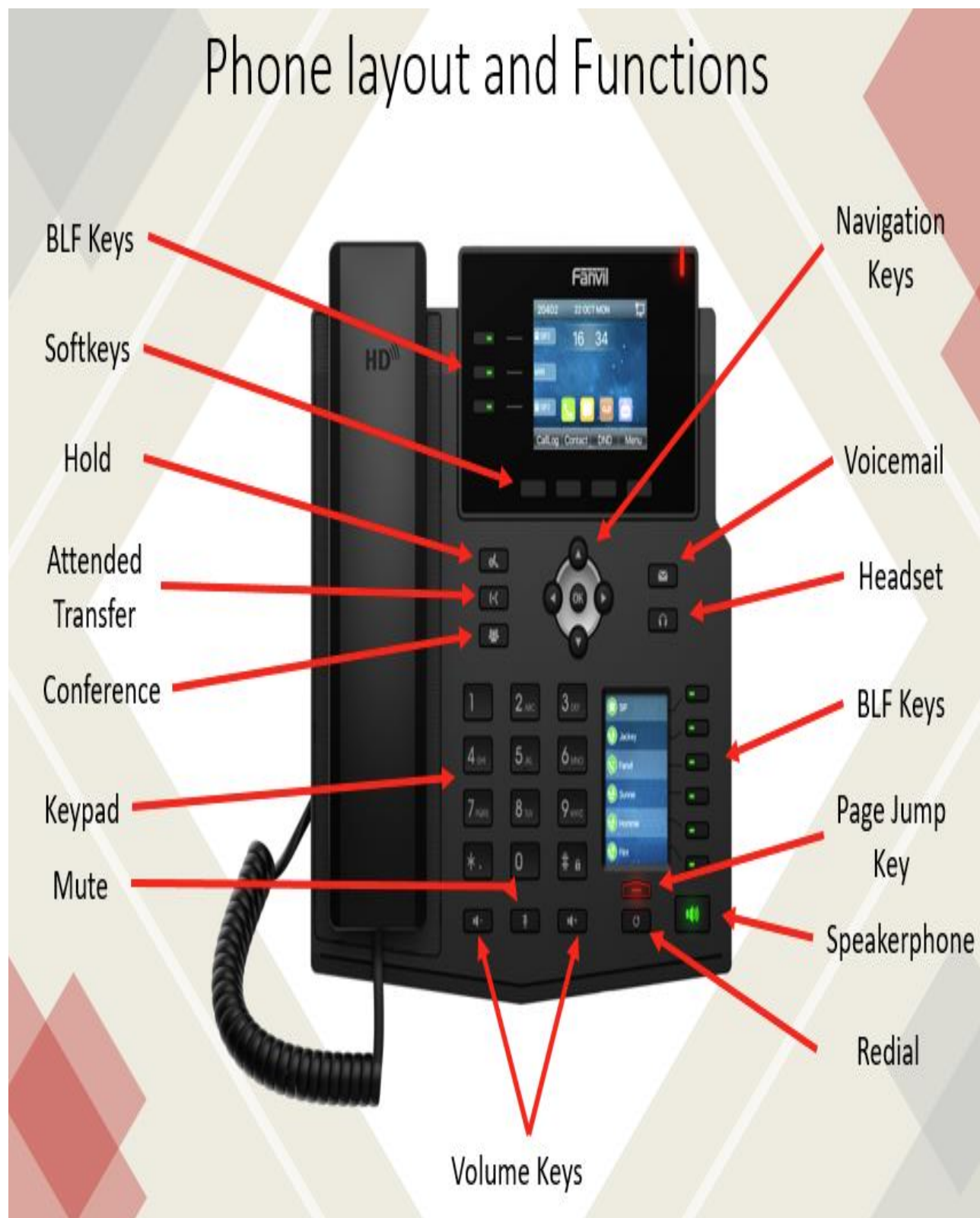


3CX Phone Service Guide

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3CX Phone Layout and Functions:





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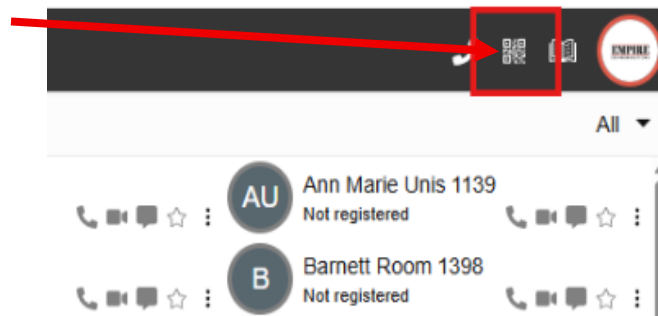
33 Talbot Street South • Essex, ON • N8M 1A8
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Title: 3CX – Downloading and Linking the 3CX App

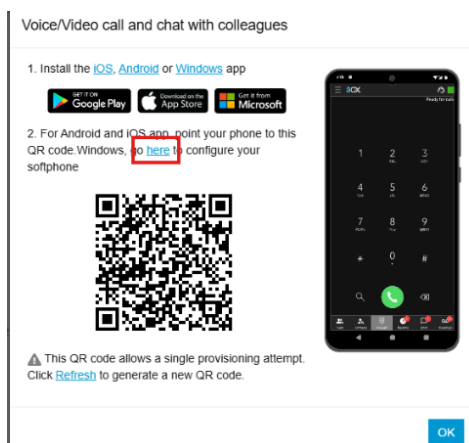
Created By: H Rivest

Date: May 28, 2025

- 1) Download the 3CX app from your mobile phone's app store.
- 2) Open the phone app and allow permission for camera and microphone access.
- 3) Log into 3CX on your computer and click on the QR code icon in the top right corner.



- 4) Scan the QR code using your mobile phone camera to link the app with your computer.



When paired correctly your mobile phone app will display “ready for calls” in the top right-hand corner.



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Title: 3CX – Configuring Voicemail

Created By: H Rivest

Date: May 28, 2025

Configuring Voicemail Using Desktop Phone

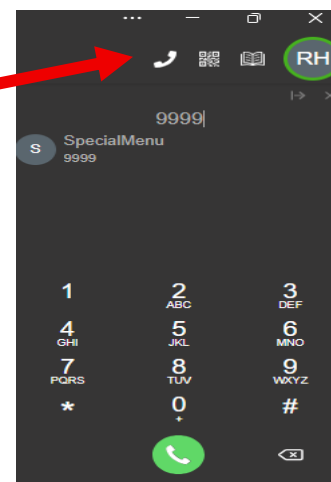
- 1) Lift the receiver and select the “mail icon” button on the right side of the phone.



- 2) When prompted enter your PIN followed by the # key.
- 3) Follow the voice guided prompts or press 9 for options.
- 4) To record your name, press 5 and follow the voice guided prompts.
- 5) To change your PIN, press 7 and follow the voice guided prompts.
- 6) To record your greeting message, press 8 and follow the voice guided prompts.

Configuring Voicemail Using Soft Client

- 1) Select the phone icon in the top right-hand corner of the screen and dial 9999. When prompted enter your PIN followed by the # key.
- 2) Once you are in your voicemail press 9 for more options.
- 3) To record your name, press 5 and follow the guided prompts.
- 4) To change your pin, press 7 and follow the guided prompts.
- 5) To change your greeting, press 8 and follow the guided prompts.





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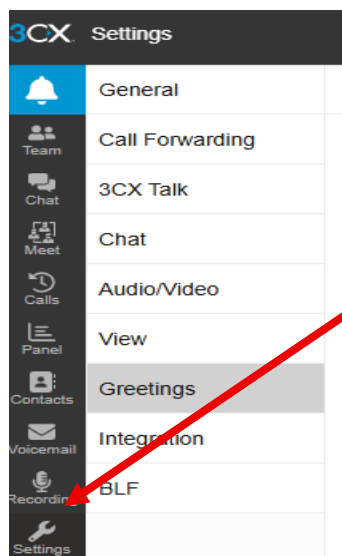
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Title: 3CX – Recording Custom Greeting Messages

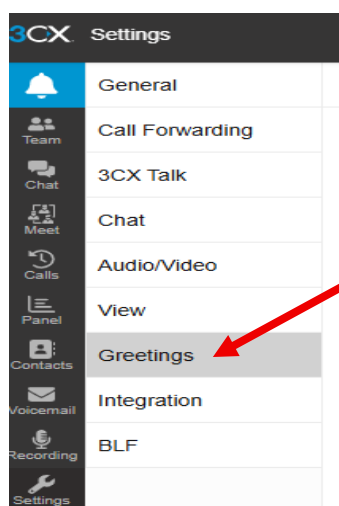
Created By: H Rivest

Date: May 28, 2025

- 1) Log into your 3CX account and then select the **“Settings”** tab on the middle-left side of the screen.



- 2) From the settings drop down menu, select the **“Greetings”** tab.

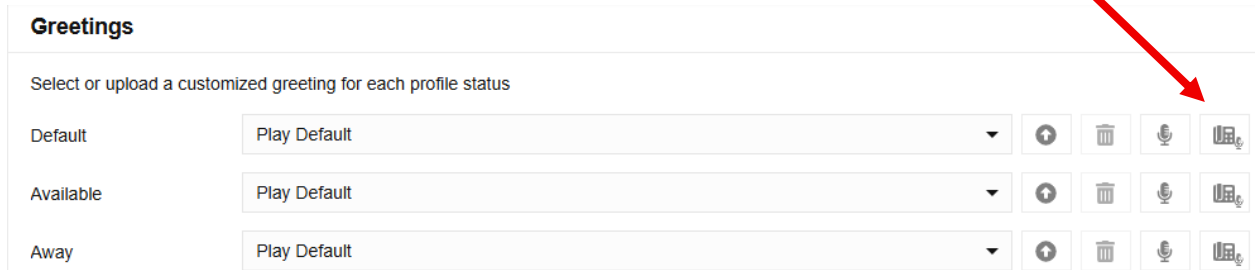


- 3) Select the phone icon on the far-right side of the screen next to “default” or any other status you wish to record a custom greeting for.

Greetings

Select or upload a customized greeting for each profile status

Default	Play Default	⬇	🔄	🗑	🎤	📞
Available	Play Default	⬇	🔄	🗑	🎤	📞
Away	Play Default	⬇	🔄	🗑	🎤	📞



- 4) When the pop-up appears, name your file but keep the .wav at the end and select ok.

Record Media Prompt File ✕

Enter a file name for your new prompt. Note: To see new file in the list refresh page after recording.

Enter a file name to record a new audio prompt. *

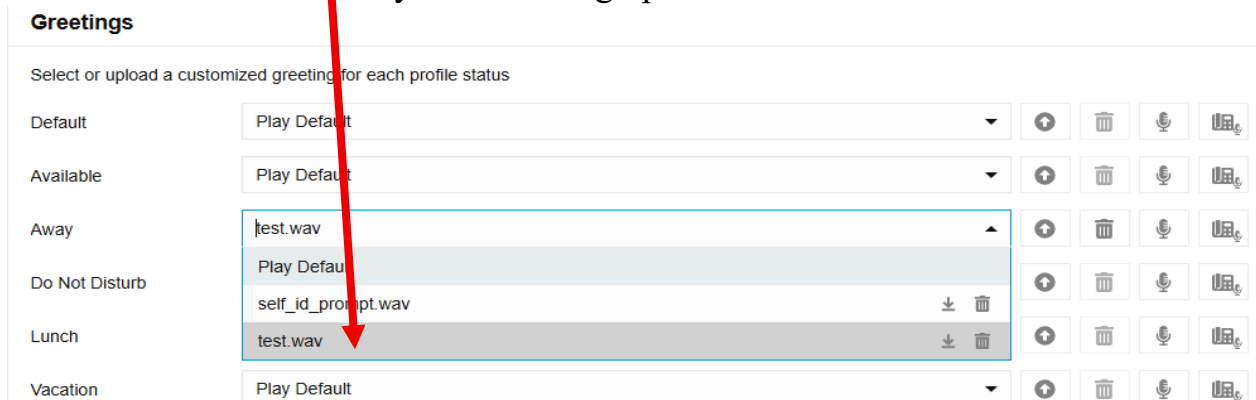
OK Cancel

- 5) The system will then call your extension, follow the voice prompted instructions to record your desired greeting.
- 6) Once the recording is completed, select your file from the drop-down menu associated with the status you are setting up.

Greetings

Select or upload a customized greeting for each profile status

Default	Play Default	⬇	🔄	🗑	🎤	📞
Available	Play Default	⬇	🔄	🗑	🎤	📞
Away	test.wav	⬆	🔄	🗑	🎤	📞
Do Not Disturb	Play Default	⬇	🔄	🗑	🎤	📞
Lunch	self_id_prompt.wav	⬇	🔄	🗑	🎤	📞
	test.wav	⬇	🔄	🗑	🎤	📞
Vacation	Play Default	⬇	🔄	🗑	🎤	📞



- 7) Repeat steps 3-6 to record different greetings for the rest of your different statuses if you wish.



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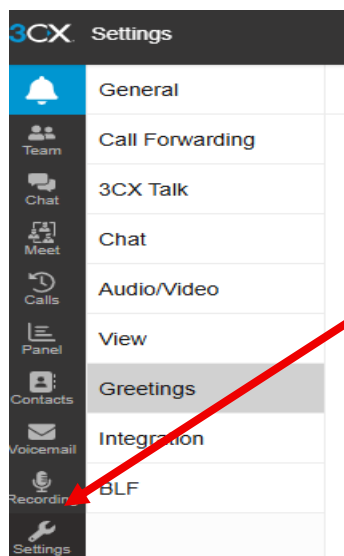
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Title: 3CX – Adding BLF's

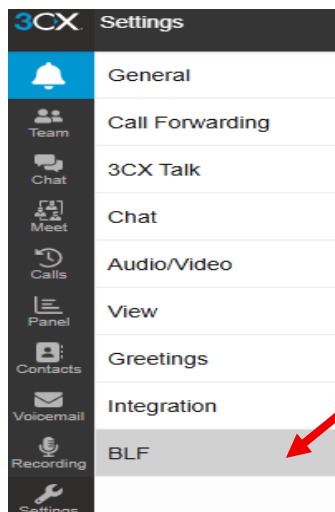
Created By: H Rivest

Date: May 28, 2025

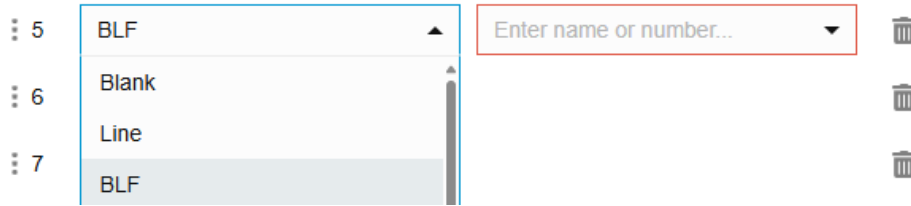
- 1) Log into your 3CX account and then select the “Settings” tab on the middle-left side of the screen.



- 2) From the settings drop down menu select the “BLF” tab.



- 3) To start adding BLF buttons select **“BLF”** from the left dropdown menu. Then using the dropdown menu on the right side, select the name or extension number of the person you wish to add a BLF too.



The first 3 BLF slots appear on the top left side of the phone, while the remaining 6 will appear on the bottom right side of the phone.



- 4) To reboot your phone to see the changes, first select the **“menu”** soft key button.



- 5) Navigate to the basic settings icon using the arrows on the phone pad (2 right clicks followed by 1 down click, then click “OK”)



- 6) Once within the menu, use the arrows on the phone pad again to scroll all the way to the bottom of the screen until you reach the “**reboot system tab**” and then click “OK” twice to reboot your phone.



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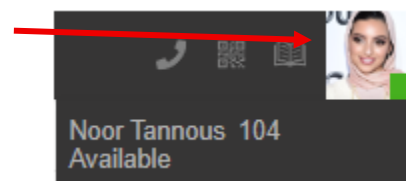
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Title: 3CX – Managing Your Status from The Desktop App

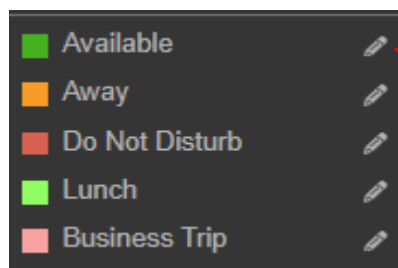
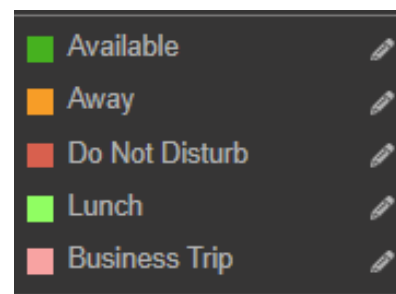
Created By: H Rivest

Date: May 28, 2025

1) Click on your avatar in the top right corner.

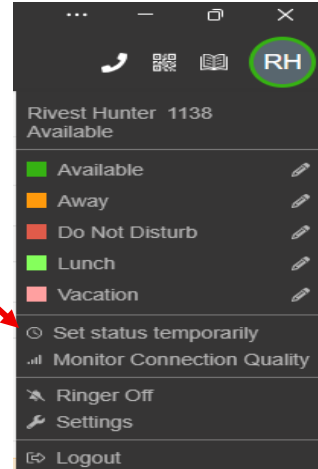


2) Select from the status options available in the dropdown. (When your line is busy your status will automatically change to “away”.)



If you wish to change your status messages, click on the pencil icon and enter your new status name. To confirm your new status name select “ok”.

- 3) To set a temporary status click on your avatar in the top right corner and then select **“set status temporarily”** from the dropdown menu.



- 4) Use the dropdown menus within the pop-up to change the type of your status and the duration of your status. Select **“OK”** to confirm changes. (Once the time has passed your status will reset back to the default.)

Set status temporarily ✕

Select a temporary status for a specific duration. Your status will automatically change back to its current state when this time is up.

Change Status to
Lunch ▼

For
1 hour ▼

Set status message



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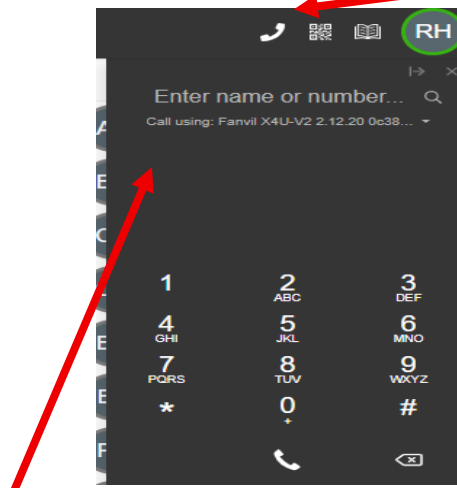
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Title: 3CX – Handling Phone Calls

Created By: H Rivest

Date: May 28, 2025

- 1) Select which device you wish to place the call with by selecting the “**phone icon**” button on the top right corner of the screen.



- 2) Click on the “**call using**” dropdown menu to select either the “**Fanvil X4U, Browser, or Smartphone**” option.

Transferring Calls:

Blind Transfer: A blind transfer transfers the call instantly to the selected destination without alerting the intended recipient.

- 1) In the active call, select the “**transfer softkey**” and dial the number of the person you want to transfer the call to.



Attended Transfer: The call is transferred to the selected destination after the intended recipient is alerted by you.

- 1) During an active call, press the “**attended transfer**” button on your phone.



- 2) The call will be placed on hold, and you will hear the dial tone. Dial the number or extension of the intended transfer recipient.
- 3) You can speak with the transfer recipient to prepare them for the call or update them with information.
- 4) Press the “attended transfer” button again to complete the transfer of the call.



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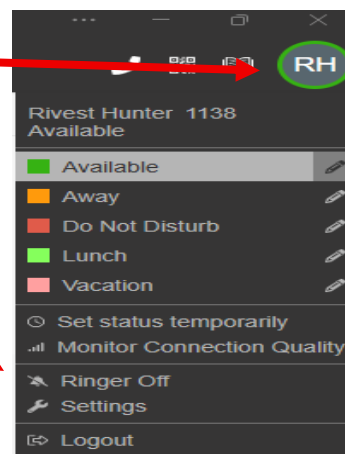
Title: 3CX – Notifications and Ringtones

Created By: H Rivest

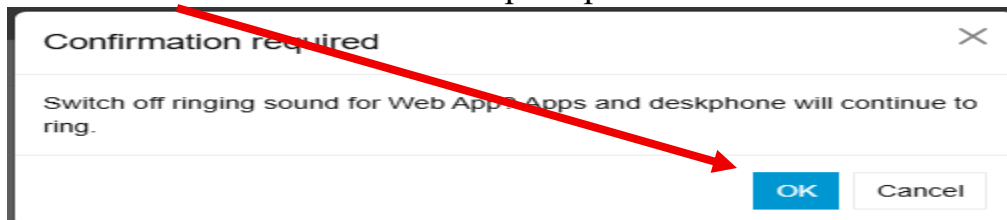
Date: July 23, 2025

Ringtone on 3CX PWA App:

- 1) In the top right corner, click on your profile icon.
Then click on the “Ringer Off” tab.



- 2) Select “Ok” in the new tab when prompted.



- 3) Your computer ringtone should now be silenced, indicated by a bell icon with a line through it.



- 4) To turn your ringtone back on your computer, click on the previously indicated bell icon.

Ringtone on Desk Phone:

- 1) On your desk phone, press the “menu” softkey.



- 2) Navigate to the basic settings icon using the arrows on the phone pad (2 right clicks followed by 1 down click, then click “OK”)



- 3) Once within the menu, use the arrows on the phone pad again to scroll down until you reach the “ring tab” and then click the “OK” button on your phone.
- 4) Use the left arrow on the phone pad to turn the number on the “headset” and “handfree” icons to 0 and then click the “Ok” button.
- 5) To turn your ringtone back on repeat steps 1-3 and then use the right arrow on the phone pad to turn the number on the “headset” and “handfree” icons to 6 and then click the “Ok button”.