



# 3CX WEB CLIENT USER GUIDE



ACC TELECOM  
3CX TITANIUM PARTNER



# TABLE OF CONTENTS

<b>04</b>	NEW USER CHECKLIST
<b>06</b>	VOICEMAIL SETUP
<b>07</b>	VOICEMAIL CONTINUED
<b>09</b>	ANSWERING A CALL
<b>10</b>	PLACING A CALL
<b>11</b>	TRANSFERRING A CALL- OVERVIEW
<b>12</b>	TRANSFERRING A CALL CONT.
<b>14</b>	3CX MESSAGING- CHAT
<b>15</b>	3CX MESSAGING- SMS TEXT
<b>16</b>	3CX MESSAGING- FB & WEBSITE
<b>18</b>	SCHEDULING CONFERENCE CALLS
<b>19</b>	VIDEO CONFERENCING FEATURES
<b>20</b>	SCHEDULING VIDEO CONFERENCES
<b>21</b>	ON-DEMAND VIDEO CONFERENCES
<b>22</b>	JOINING A VIDEO CONFERENCE
<b>24</b>	STND FUNCTIONS- CALL FWD
<b>24</b>	STND FUNCTIONS- PRESENCE STATUS
<b>24</b>	STND FUNCTIONS- DO NOT DISTURB
<b>25</b>	SPECIAL FUNCTIONS- CALL PARK
<b>26</b>	SPECIAL FUNCTIONS- MISC. EXT PICKUP
<b>26</b>	SPECIAL FUNCTIONS- ALL CALL PAGE
<b>26</b>	SPECIAL FUNCTIONS- VIDEO CALLING
<b>27</b>	CONTACT US

# New User Checklist

# NEW USER CHECKLIST



## NEW USER ACTION ITEMS

PRIOR TO USING YOUR NEW 3CX WEB/DESKTOP CLIENT, PLEASE REVIEW THE FOLLOWING ACTION ITEMS BELOW & CONTACT YOUR SYSTEM ADMIN WITH ANY QUESTIONS.

PLEASE NOTE SOME FEATURES & ACTION ITEMS BELOW ARE ON A PER APPLICABLE BASIS AND MAY NOT PERTAIN TO YOUR ACCOUNT.

- Test your extension and/or direct dial phone number (DID) by placing a call to your DID/extension from an outside number, such as a cell phone.
- Setup your Voice Mailbox. See page 6 for first time setup instructions.
- Record your Self Identification Message (SIM) during your voicemail setup. For the dial-by-name directory to function correctly, all users must record their SIM.
- Verify that you are receiving Voicemails to Email and/or Voicemail Transcriptions.
- Log in to your 3CX Web Client using your username/temp password found in your welcome email. Change your password by clicking the 3 horizontal dots--> Settings----> General.
- Complete your Mobile App configuration by scanning your QR code found in your 3CX Welcome email.
- Send a chat message to your colleagues (either 1:1 or a group message).
- Send a SMS text message. Type +1 in front of the phone number; i.e.- +19105732467.

VoiceMail



# VOICEMAIL

## FIRST TIME VOICE MAILBOX SETUP INSTRUCTIONS

(1) Log in to your **3CX Web Client**.\*

*\*Your 3CX Web Client URL link, username and password will be located in your 3CX Welcome email. Please contact your System Administrator if you did not receive your welcome email.*

(2) Click the **avatar icon** at the top left corner of the web client screen.

(3) **Click your name and extension number** in the drop down section. This will open the Settings menu.

(4) Under Settings, choose **Greetings**.\*

*\*By default all profiles use the Default recording. To play the default greeting, click the play icon on the right.*

(5) Press the **Record Greeting** button to record your personal greeting.

(6) **Name your greeting file.** A small window will appear asking for a file name. Enter an identifying name, then click OK.

(7) Your phone/softphone will ring to allow you to speak your greeting into your handset or headset. **Answer the system call and follow the instructions** to record and save your greeting.

(8) **Set your new greeting as the Default.** Click the drop down menu under Default Recording to set the new greeting you recorded.

(9) Follow the same steps to record additional voicemail greetings for each profile (ex- business trip, lunch, DND, vacation, etc.). **NOTE:** The default greeting will play for all profiles if no other greeting is set.

**IMPORTANT INFORMATION:** To protect the security of your voicemail, we recommend using 6-digit voicemail PIN codes (per applicable). **DO NOT USE** generic PIN codes such as the last 4-6 digits of your extension number or phone number. Additionally, do not use consecutive numbers (ex- 123456) or repeating numbers (ex- 11111) as your voicemail PIN code.





# VOICEMAIL

## ACCESSING YOUR VOICEMAIL MESSAGES INTERNALLY

To access your voicemail messages from your 3CX system, **click the three horizontal dots** on the left side of the web client screen.

Next, **click Voicemail** from the flyaway box.

**Hover over a voicemail** to display message options on the right side of your screen. Voicemail message options include:



### Download

Ability to download and save the voicemail message.



### Delete

Delete the voicemail from the screen and the 3CX system.



### Call

Place a return call to the person that left the voicemail.



### Add Contact

Ability to add the caller's information to your contact list.



### Play

The system will ring your phone/softphone. Answer the call to play the voicemail.



### Transcription

Transcribe the message into text. Voicemail Transcription is a premium feature. Please contact your Admin for more information.

Answering,  
Placing &  
Transferring  
Calls



# ANSWERING A CALL

Answering an incoming call from the 3CX Web Client Softphone



## HOW TO ANSWER A CALL FROM YOUR 3CX WEB CLIENT

Open your 3CX Web Client on your computer or tablet.

Incoming calls will auto-populate the 3CX softphone on the right side of your computer screen.

Click the **green circle call button** to answer the call.

## DECLINE A CALL

To decline a call from your 3CX Web Client, click the **red circle button** on your softphone.

## SEND THE CALL TO VOICEMAIL

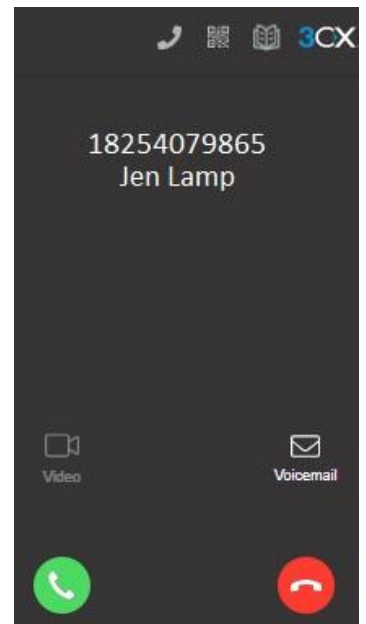
To send a caller straight to voicemail while the call is actively ringing, click the **envelope icon** that says **Voicemail**.

All devices associated with your extension will stop ringing.

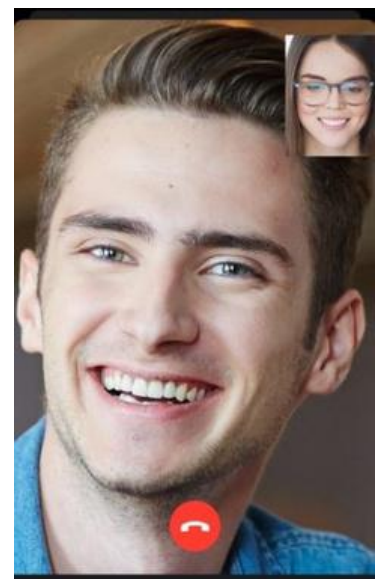
## CONVERT THE CALL TO VIDEO

If the caller has video capabilities, the video icon on your 3CX softphone will activate by changing from gray to white.

Click on the activated **video icon** to convert from audio to video.



^ 3CX Softphone



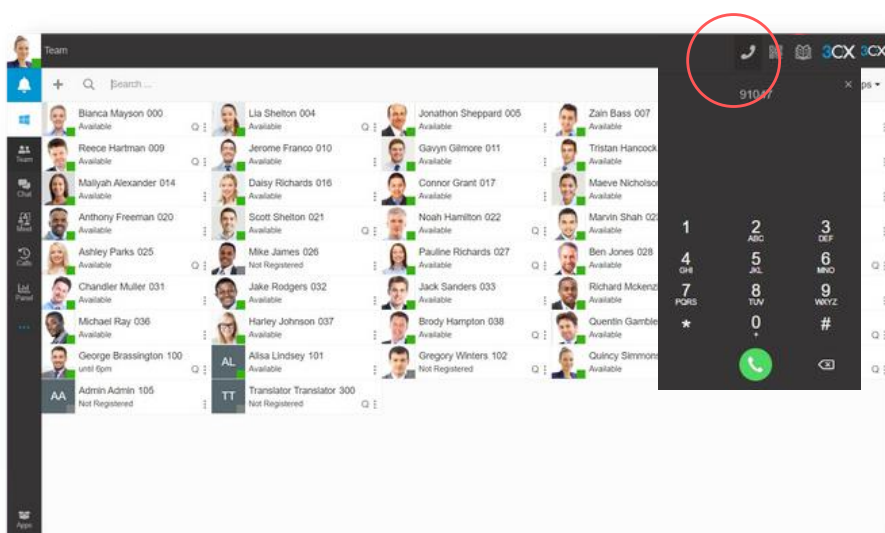
^ Video call via Softphone

# PLACING A CALL

## Placing a call from the 3CX Web Client Softphone



### TO PLACE AN EXTERNAL CALL



Click the **handset icon** at the top right of the screen to open the softphone.

**Dial the 10-digit phone number** you intend to call by using your computer's keyboard, mouse, or via touchscreen.

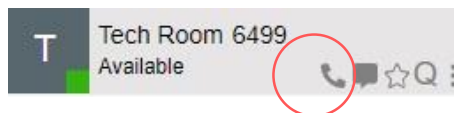
Click the **green circle button** to launch the call.

### TO PLACE AN INTERNAL CALL

Click the **handset icon** to open the softphone. **Dial the extension number** you wish to call and press the **green circle icon**.

You may also click on the **People icon** on the left side of the 3CX Web client, then **hover over** the colleague's name you wish to call.

Click the **handset icon** to initiate the call.



### TO PLACE AN INTERNATIONAL CALL

To place an international call\*, **dial 011 + the country code of the calling destination + the international number** and press the green circle button.

*\*Please contact your Office Manager if the system prompts you for an international PIN code.*

# TRANSFERRING A CALL - OVERVIEW



## 3 TYPES OF CALL TRANSFERS

### **Blind Transfer:**

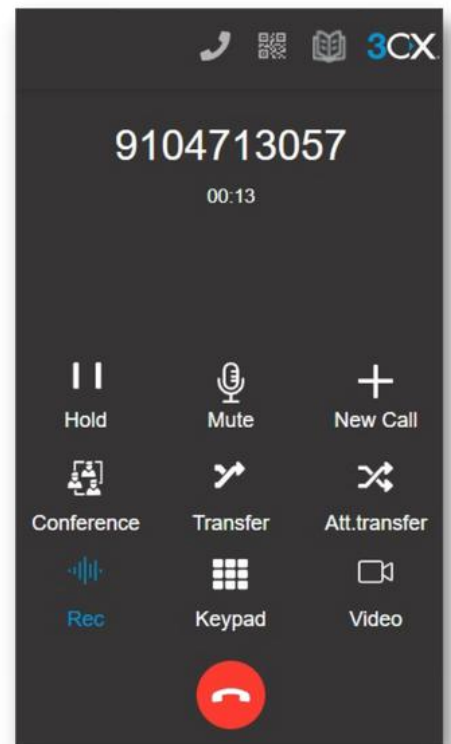
Transferring a call without introducing the caller before transferring.

### **Supervised or Attended (Att.) Transfer:**

Announcing or introducing the caller to the transferring party before releasing the call.

### **Uninterrupted Transfer to Voicemail:**

Send a call directly to voicemail without ringing the intended user's phone. This will send the caller directly to the user's mailbox and will not ring their phone set.





# TRANSFERRING A CALL CONT.



## 1 BLIND TRANSFER

While on a call, click the **Transfer icon** on your softphone. **Dial the extension number** that you want to transfer the call to using your keyboard or mouse.

While typing the number, a **list of personnel will display** that matches the digit criteria. **Click the user** to transfer the call.

## 2 SUPERVISED/ATTENDED TRANSFER

While on a call, **click the 'Att. Transfer' button** on your softphone.

**Dial the extension number or name** that you want to transfer the call to using your keyboard or mouse. **Click the user** to initiate an **internal call to that user**.

**The caller will be placed on hold.** Announce the caller and confirm the user would like to take the call, then **click the Join icon** to complete the call transfer.

## 3 UNINTERRUPTED TRANSFER TO VOICEMAIL

While on call, **press the 'Transfer' softkey**. Dial **\*4 + the extension number** (ex- \*4101) that you are transferring the call to and **press the green call button**.

This will send the caller directly to the user's mailbox and will not ring the softphone or phone set.

## \* RETURNING TO A CALL ON HOLD BEFORE TRANSFERRING

Before the call transfer is completed, you can cancel the transfer process by clicking the **Arrow icon** located at the bottom right of the softphone window.

If performing an **Att. Transfer** and a user refuses the call, click the **red circle icon** to end the call with the *internal* user. Click the **Resume icon** to return to the *original caller* that was on hold.



Messaging

# 3CX MESSAGING



## Chat Messaging

Chat messages are centrally located under the Chat icon and can be responded to in real time from the 3CX mobile app, web client & desktop client.


### Internal Chat

3CX's Internal Chat feature allows you to send and receive instant messages to colleagues from your 3CX web client, mobile app and desktop client.

### Chat Features:

- 1:1 or Group Chat
- Document Share
- Picture Share
- Emojis
- Persistent Chat (continues conversation without deleting previous messages)
- Archive Messages
- Switch from chat conversation to a phone call or video call

### How to Send a Chat Message:

Click on the Chat Icon (  ). The blue '1' above the chat icon indicates one new message.

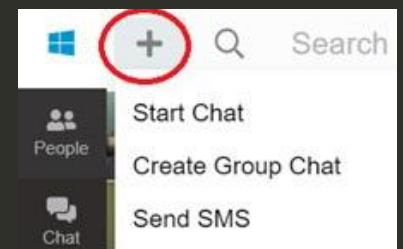
Click on the (+) symbol to start a new conversation.

In the drop down box, choose 'Start Chat' to chat with one colleague. Choose 'Create Group Chat' to start a conversation with more than one colleague.

Type the name, extension number, or email of the person(s) that you wish to message. If choosing 'Group Chat,' then add a title to your Group Chat for future reference.

Type your message, and if applicable, attach documents, pictures, and/or emojis.

Click the paper plane icon at the bottom right of the screen to send your message.




# 3CX MESSAGING



## SMS Text Messaging

SMS Text Messages are centrally located under the Chat icon and can be responded to in real time from the 3CX mobile app, web client & desktop client.


SMS messages are denoted with a blue cellular phone icon to indicate the message was sent as a text. 

---

### SMS Overview

3CX's text messaging feature allows you to send and receive text messages to cellular phone numbers from your 3CX web client, mobile app and desktop client.

#### How to send a Text Message:

Click on the Chat Icon (  ). The blue '1' icon above the chat icon indicates one new message. Click on the (+) symbol to start a new conversation.

In the drop down box, choose 'Send SMS' to compose your text message.

Type a contact name (if saved in your contact list with a cell phone number), or type a cellular phone number. **IMPORTANT NOTE:** You must type +1 in front of the cell phone number that you are texting. Ex- +14105842653

Type your message; include emojis or file attachments if applicable.

Click the paper plane icon at the bottom right of your screen to send your message.

---

### SMS Disclaimers:

\*3CX SMS is a premium feature and must be authorized by your System Administrator.

\*Sending & receiving MMS picture messages or files may not be available yet for your 3CX system. Please contact your ACC Account Manager for more information.

\*All SMS-enabled phone numbers must register for 10DLC compliancy for anti-spam verification. Contact your System Admin to learn more.

# 3CX MESSAGING



## Facebook Messenger Integration & Live Website Chat

Integrate Facebook Messenger and your company's website with 3CX!

Facebook Messenger and Website Chat messages are centrally located under the Chat icon and can be responded to in real time from the 3CX mobile app, web client & desktop client. Messages are denoted with different blue icons depending on where the message initiated.

Contact your System Admin for more information.

### Live Website Chat

#### How it works:

Install 3CX's free Live Chat plug-in on your company website to chat with website visitors in real time.

Switch from chat to phone call or video call at any point during the interaction to resolve questions faster.

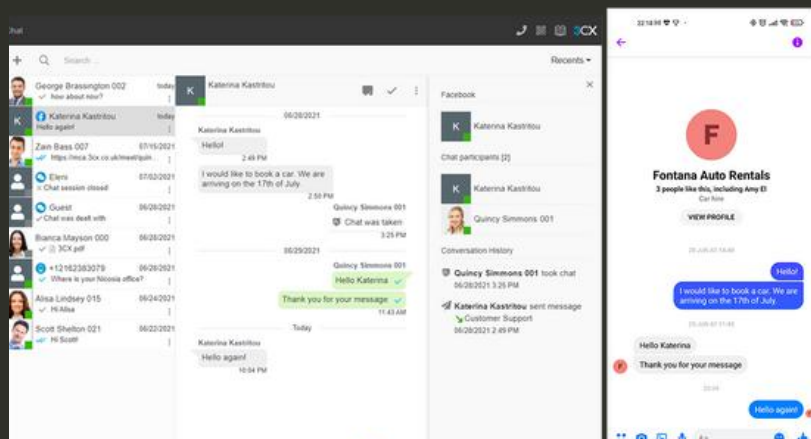


### Facebook Messenger Integration

#### How it works:

Sync your Company's Facebook Messenger account with your 3CX system.

Inbound messages can be programmed to go to a single user, a group of users, or a queue for fast response times.





# Audio & Video Conferencing

# SCHEDULING AN AUDIO CONFERENCE

## SCHEDULING AN AUDIO CONFERENCE FROM YOUR 3CX CLIENT

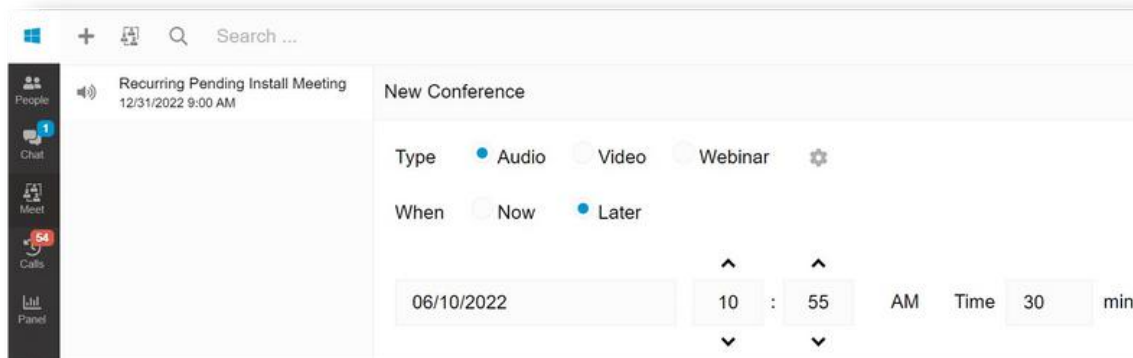
---

### SCHEDULING AN AUDIO-ONLY CONFERENCE BRIDGE FROM THE 3CX WEB CLIENT

Access your 3CX Web Client and click the **'Meet' icon**.

Click the **plus (+) symbol** to create & schedule a new audio conference.

Choose **'Audio'** and click **'Later'** to pick a date & time for your scheduled conference. Add a subject line and notes for your meeting participants.



Clicking **'Enable Announcements'** will verbally announce the participants names as they join the conference call.

Choose your **email calendar of choice to download the meeting invite**. The meeting invite information will launch in your email/calendar. **Add participants** to this invite and **click send**.

# VIDEO CONFERENCES & WEBINARS

## VIDEO CONFERENCING OVERVIEW & FEATURES



### VIDEO CONFERENCING FEATURES

3CX's native video platform provides a full-featured video conferencing solution for meetings, trainings, and webinars.

Features include:

- Conferencing, Webinars, Trainings
- Up to 250 participants\*
- Chat & Raise Hand
- Recording
- Schedule & join conferences from the 3CX web client, desktop client, or mobile apps
- Q&A with Answered/Unanswered Indicators
- Network Stability & Statistic Controls
- Presenting
  - Presenter Controls
  - Screen Share
  - Camera Sharing
  - Video Stream Sharing
  - PDF Share
  - Polls / Surveys
  - Whiteboard & Chalkboard

**\*Number of participants is based on your 3CX License Edition (25-Standard, 100-Professional, 250-Enterprise).**





# VIDEO CONFERENCES & WEBINARS

## SCHEDULING VIDEO CONFERENCES

---

### SCHEDULE A VIDEO CONFERENCE FROM YOUR 3CX WEB CLIENT

Log in to your online 3CX Web Client and click the 'Meet' icon.

Click the **plus (+) symbol** to create & schedule a new video conference.

Choose your **meeting type** (audio-only, video or webinar). Choose your **date & time**, add a **subject line** and notes for participants.

Next, select your **email calendar** of choice to download the **meeting invite**. The meeting invite should open in your email client (ex- Gmail, Outlook, etc.). **Add attendees** to the invite and click send.

### IMPORTANT NOTES:

**Canceling a meeting** should be handled from your email calendar to ensure proper delivery of the cancelation notification to participants.

Currently, to **reschedule a meeting**, the original meeting must be canceled first via the web client. Schedule a new meeting using the steps above.

To **view your scheduled conferences**, or **launch an on-demand video conference**, click the 'Meet' icon, then click the Video Conference icon (  ).

---





# VIDEO CONFERENCES & WEBINARS

## LAUNCHING AN ON-DEMAND VIDEO CONFERENCE

### LAUNCH AN INSTANT VIDEO CONFERENCE FROM YOUR 3CX WEB CLIENT

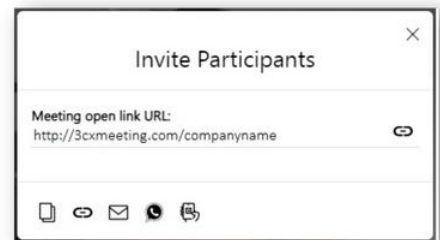
Log in to your online 3CX Web Client and click the **'Meet'** icon.

Next, click the **Video Conference icon** (  ) to launch an instant video conference.

A **'Quick Meeting'** screen will populate. Click **Join Now** if using your computer for the meeting.

Click **'Switch to Mobile'** and scan the QR code to join the video conference from your mobile device.

Upon launch of the 3CX Video Conference Room, a pop-up box will appear with the **video meeting URL**.

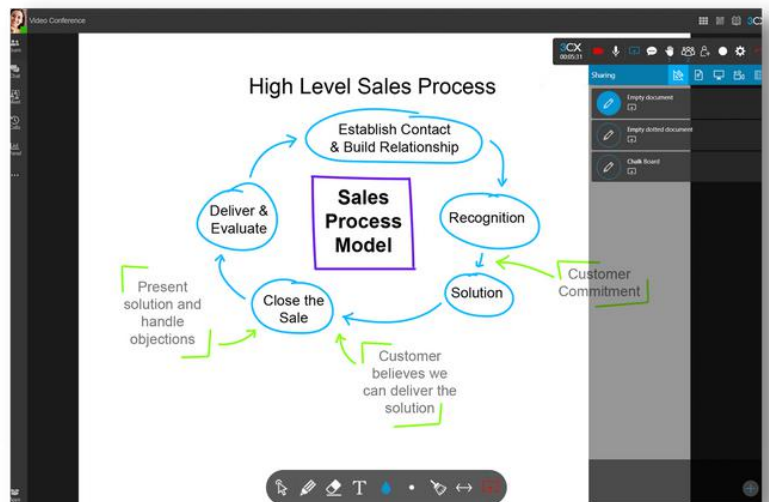


You can **copy, share, & email this link to participants** to join your ad hoc video conference.

### VIDEO CONFERENCING PRESENTING OPTIONS

The meeting Host has options to present or share documents, cameras or videos.

Click the **Present icon**, then choose to share a whiteboard (empty document), a dotted whiteboard (dotted grid lined document), or chalkboard. Use the controls at the bottom of your screen to draw and type on the screen.



Hosts can also share PDFs, computer screens, video streams, and cameras. Additionally, Hosts can create polls and surveys for attendees to participate in during the meeting.

# VIDEO CONFERENCES & WEBINARS

## JOINING A VIDEO CONFERENCE & SAVING A RECORDED SESSION



## HOW TO JOIN A PRE-SCHEDULED VIDEO CONFERENCE FROM THE 3CX WEB CLIENT

Log in to your online 3CX Web Client and click the **'Meet'** icon.

Click the **Video Conference icon** (  ) to view your scheduled conferences.

Click on a **scheduled meeting** to access the meeting link. Click on the URL to join the meeting, or click **'Join.'**

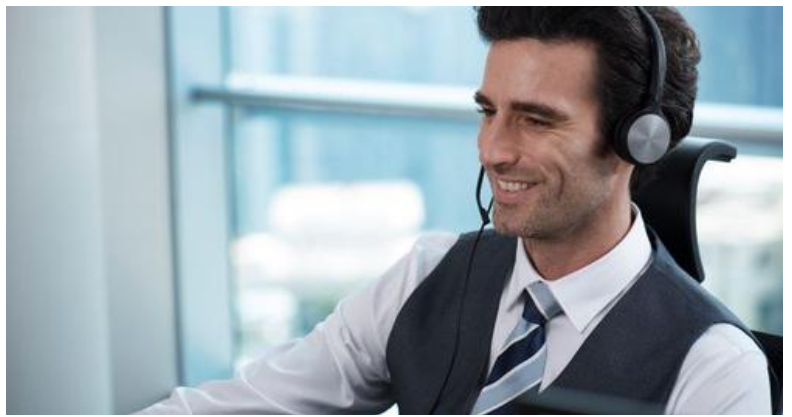
## SAVING YOUR 3CX VIDEO CONFERENCE RECORDING

3CX will email a Meeting Report within 5–15 minutes after your video conference has ended. If your meeting was recorded, the recorded meeting URL will be located in this report.

Click the URL and **download the recording within 7 days**. The meeting will be **permanently deleted from the system in 7 days** and will not be recoverable.

# Standard & Special Functions

# STANDARD FUNCTIONS



## CALL FORWARDING

Call forwarding is controlled by your personal profile using the 3CX clients. To forward calls from your 3CX web or desktop clients, **click the '3 horizontal dots' under Panel.**

**Click 'Settings,'** then **click 'Status'** to set the call forwarding attributes for each type of presence status (i.e.- Available, Away, Do Not Disturb, Lunch, Business Trip, etc.).

Choose to forward calls to an external number, voicemail, another extension, etc. **Each status must have its own call forwarding attributes set for internal and external calls.** Contact your System Administrator for more information.

## SET PRESENCE STATUS

Presence status is controlled by your personal profile using the 3CX clients.

To change your presence status, **click on your Avatar picture,** and **choose a status option** from the list (ex- Available, Away, Lunch, DND, or Business Trip).

To **add or edit a custom status message,** please **click the pencil icon** next to each option.

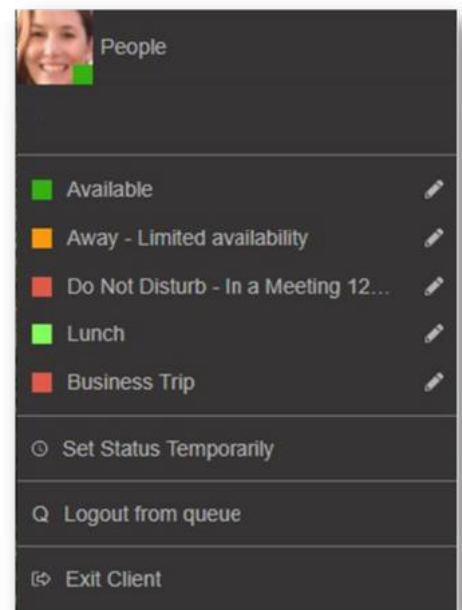
## DO NOT DISTURB

Do Not Disturb (DND) can be activated via the 3CX Web client, desktop client, or mobile app.

**To activate Do Not Disturb (DND) from the 3CX clients,** click on your avatar picture or the colored square in the top corner of your screen.

Click Do Not Disturb and set your DND away message.

**To remove DND,** follow the same process, but click 'Available' from the same screen.







# SPECIAL FUNCTIONS

## CALL PARK FEATURE

### PARK A CALL & RETRIEVE A CALL USING SHARED PARK KEYS

#### Overview of the Park Feature:

The Call Park feature places a call on an 'orbit hold,' so anyone in the company, regardless of where they are located, can retrieve the parked call by typing in the park orbit number (ex- SP1, SP2, etc.).

#### How to Park a Call:

While on an active call, click the Transfer icon (do not use the Att. Transfer icon) on your softphone.

Type SPx--replace the "x" with the park orbit number that you will use to park the call (ex- SP1, SP2, SP3, etc.). Contact your System Admin to find out the number of park orbits your company can utilize. **NOTE: "SP" must be typed in all caps.**

After typing your park orbit number (ex- SP1), click the green circle call button to transfer the call to the desired park orbit.

Once the call is parked, inform the intended recipient of the SPx orbit number where the call parked (ex- SP1, SP2, SP3, etc.).

#### To Retrieve a Parked Call:

Click the handset icon at the upper right corner of the web client to open the softphone. Enter SPX, (replacing the X with the parked orbit number 1, 2, 3, etc.) where the call is being held. Click the green circle call button to retrieve the parked call.

**PLEASE NOTE: "SP" must be typed in all caps.**

# SPECIAL FUNCTIONS CONT.



---

## ANSWERING A CALL THAT IS RINGING ANOTHER EXTENSION

To answer a call that is ringing at another extension, **press \*20\* followed by the ringing extension number** that you would like to answer (ex- \*20\*101).

Press '**Answer**' to retrieve the call.

## ALL CALL PAGE ANNOUNCEMENT

**Dial the 'All Call Page' Extension Number.** This will allow you to page all internal and off-site configured phones/softphones within your company.

*\*Please note this feature is not enabled by default and requires additional configuration. Please contact your System Administrator for your ALL CALL Extension Number.*

## VIDEO CALL

In your 3CX web client, click the phone icon to **open your softphone**.

Dial a phone number or extension number and **click the video icon** on the softphone to launch the video call.

If the recipient of the call has video calling capabilities, you will be connected via video. If not, then the call will resume with audio capabilities only.

# Thank You

WE SINCERELY THANK YOU FOR YOUR BUSINESS AND APPRECIATE THE TRUST YOU HAVE IN SELECTING ACC TELECOM TO BE YOUR TELECOM EQUIPMENT AND SERVICE PROVIDER.

3CX VIDEOS & USER GUIDES ARE ACCESSIBLE BY VISITING [HTTPS://WWW.ACCTELECOM.COM/3CX-VIDEOS/](https://www.acctelecom.com/3cx-videos/).

PLEASE CONTACT OUR SUPPORT DEPARTMENT VIA CALL OR TEXT AT 410-423-6500, OR EMAIL [SUPPORT@ACCTELECOM.COM](mailto:support@acctelecom.com) WITH ANY QUESTIONS OR CONCERNS.

THANK YOU AGAIN FOR CHOOSING ACC TELECOM. WE LOOK FORWARD TO EARNING YOUR LOYALTY AND EXCEEDING YOUR EXPECTATIONS!



---

**ACC TELECOM**

**Building a Future of Communications for Your Business**

1410-995-0101 | 888-266-2216  
[solutions@acctelecom.com](mailto:solutions@acctelecom.com) | [www.acctelecom.com](http://www.acctelecom.com)

© ACC Telecom 2022