3CX MOBILE APP USER GUIDE

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3CX TITANIUM PARTNER

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New User Checklist

NEW USER CHECKLIST

NEW USER ACTION ITEMS

PRIOR TO USING YOUR 3CX MOBILE APP CLIENT, PLEASE REVIEW THE FOLLOWING ACTION ITEMS BELOW & CONTACT YOUR SYSTEM ADMIN WITH ANY QUESTIONS.

PLEASE NOTE SOME FEATURES & ACTION ITEMS 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 extension or DID from an outside number, such as a cell phone.

- Setup your Voice Mailbox. Refer to 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.

- Download your 3CX Mobile Apps from your iOS or Android App Store. There are two apps available for download:
  - 3CX
  - 3CX Video Conference

- Complete your Mobile App configuration by scanning the QR code found in your 3CX Welcome email.

- Access your 3CX Web Client & Desktop App; refer to your 3CX Welcome email for details.

- Send a Chat and/or SMS text message. Refer to pages 14–15 for messaging instructions.

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Voicemail

VOICEMAIL

FIRST TIME VOICE MAILBOX SETUP INSTRUCTIONS

(1) Open your **3CX Mobile App*** on your iPhone or Android smartphone.

*Download your 3CX mobile app from your smartphone's app store. Complete the configuration of the app by scanning your personalized QR code located in your 3CX Welcome email.

(2) Click the **Keypad icon** and dial your **Voicemail Access Code*** (ex- 500, 5000, etc.).

*Contact your System Administrator to obtain your Voicemail Access Code.

(3) The system will prompt you for a **Personal Identification Number (PIN)*** followed by the pound symbol (#).

*Contact your System Administrator to obtain the default PIN code.

(4) Follow the prompts to change your **Personal Identification Number (PIN)**, record your **Voicemail Greeting**, and record your **Self Identification Message (SIM)***.

All system users must record their **Self Identification Message (SIM) for the dial-by-name directory to function properly.*

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- 111111) as your voicemail PIN code.

VOICEMAIL

ACCESSING YOUR VOICEMAIL MESSAGES INTERNALLY

To access your voicemail messages from your 3CX mobile app, **click the Voicemail icon** located in the bottom right corner.

Click on a **phone number or name** to **play** the message. Click the **blue square** to **stop playing** the voicemail or the **pause** icon to pause playing the audio.

Swipe left on a message to **delete the voicemail** from the app and the 3CX system.

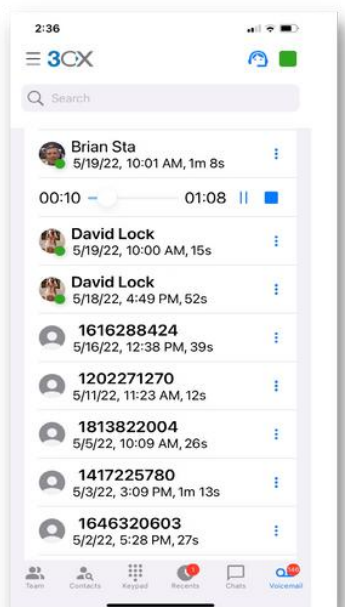Click the **3 vertical dots** by each message to display **more options**.

Options include:

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

Mark as Unheard
Provides a visual indicator that the voicemail has not been heard by bolding the text of the name or phone number.

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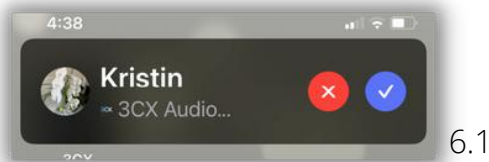Place a return call to the person that left the voicemail.

Answering, Placing & Transferring Calls

ANSWERING A CALL

HOW TO ANSWER A CALL

There are two variations of answering a call on your smartphone depending if your phone is idle or active.
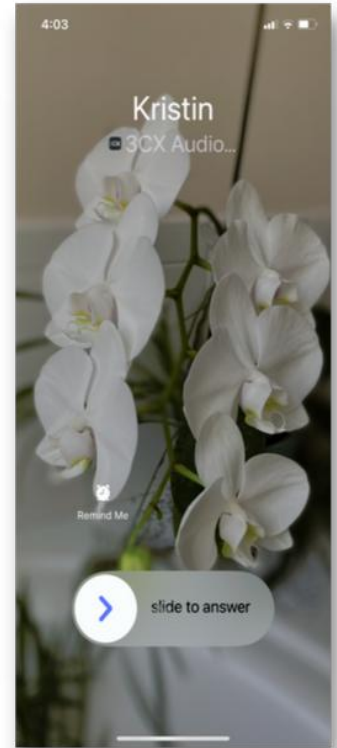
To answer a call from your 3CX Mobile App when your smartphone is active, click the **blue circle icon** (image 6.1).

6.1

To answer the call while your smartphone is idle, **slide your finger** to the right to answer the call (image 6.2).

Incoming business calls will show as '**3CX Audio**' to distinguish between business calls vs personal cell phone calls.

6.2

SILENCE OR DECLINE A CALL

To decline a call from your 3CX mobile app, click the **red circle button** on your screen,
**OR**
click your smartphone's silence button (usually located on the side of your phone). Click the silence button once to silence the call. Click the button twice to decline the call.

You can also click **Remind Me** to set a reminder for a callback.

NOTE: *Silencing or declining the call from your mobile app will not stop the call from ringing your desk phone or softphone.*

MISSED CALL

Missed business calls will display on your phone screen with the **3CX indicator** to help distinguish between 3CX system calls vs personal cell phone calls.
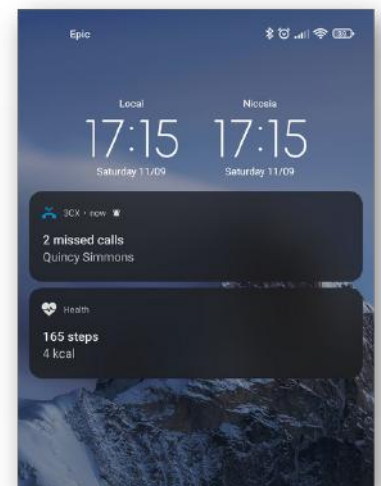
PLACING A CALL

TO PLACE AN EXTERNAL CALL

Open the **3CX mobile app** to access the **keypad**.

*The keypad is the default landing screen; however, you can also press the **Keypad icon** to open the dialer.*

Dial the phone number and press the **green circle** call button to place the call.

ACCESSING YOUR CONTACTS

You may also tap the **Contacts icon** located at the bottom of the screen to call a saved contact.

NOTES:
The list of contacts displayed will depend upon the permissions granted during the initial installation of the 3CX mobile app.

'All' contacts will be displayed by default. To change the list of displayed contacts, click 'All' then choose Company, CRM, Personal, etc.

TO PLACE AN INTERNAL CALL

Open the **3CX mobile app** to access the **keypad**. Dial an **extension number** and press the **green circle** call button to place the call.

You may also tap the **Team icon** located at the bottom of the screen to access your **company contacts**. Tap the **contact name** to place 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 call button.

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

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TRANSFERRING A CALL - OVERVIEW

3 TYPES OF CALL TRANSFERS
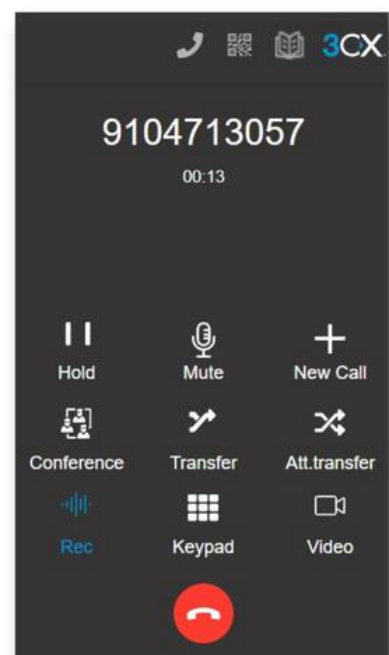
Blind Transfer:
Transferring a call without introducing the caller before transferring.

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, press the **Transfer icon** on the mobile app keypad screen.

Dial the number that you want to transfer the call to and press the **Transfer button** at the bottom of your app screen to complete the transfer.

2

SUPERVISED/ATTENDED TRANSFER

While on a call, press the **'Att. Transfer' icon** on the keypad screen.

Dial the number that you want to transfer the call to and press the call button.

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

3

UNINTERRUPTED TRANSFER TO VOICEMAIL

While on call, **press the 'Transfer' button**. 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 **Cancel** button and then clicking the **Resume** button.

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, or desktop client. Chat messages are denoted with the chat icon:

Chat Features

Send and receive chat messages to colleagues from your 3CX web client, mobile app, or desktop client. Chat features include:

- 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 ' 1 ' above the chat icon indicates one new message.

Click on the compose icon ( ) to start a new conversation.

Choose the type of message you wish to initiate:
- Compose Chat
- Compose Group Chat
- Compose SMS

Type or touch the name or extension number of the person(s) that you wish to message. If choosing 'Group Chat,' then you will be prompted to 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 your screen to send your message.
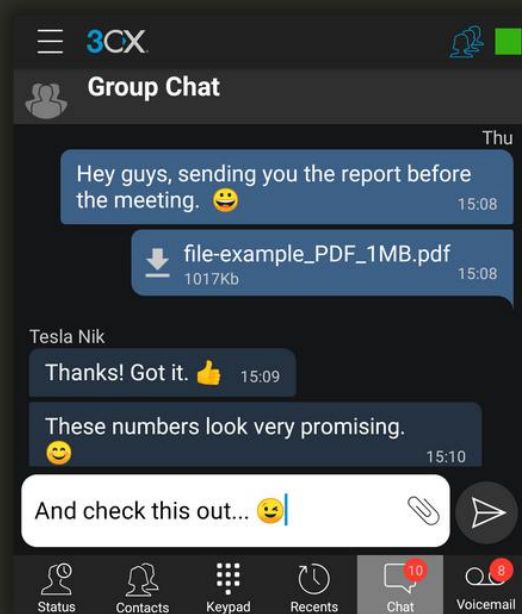
3CX MESSAGING

SMS Text Messaging

SMS Text Messages are centrally located under the Chat icon. Send and respond to text messages in real time from the 3CX mobile app, web client, or desktop client.

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

How to send a Text Message:

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

Click on the compose icon (✏️) to start a new conversation and choose **Compose SMS**.

Type a contact name (if saved in your contact list with a cell phone number), or type a cellular phone number using +1 as the prefix.

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

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

IMPORTANT NOTE:
You must type **+1** in front of the cell phone number that you are texting or the message will fail to send. Ex- +14105842653

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, or 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.
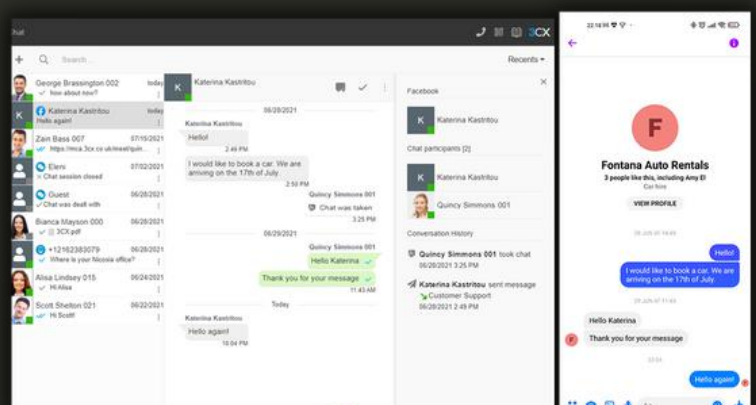
Facebook Messenger Integration

How it works:
Sync your Company's Facebook Messenger account with your 3CX system.

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

Audio & Video Conferencing

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 3CX web client, desktop client, & mobile apps
- Q&A with Answered/Unanswered Indicators
- Network Stability & Statistic Controls

- Present
  - 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-PRO, 250-Enterprise).
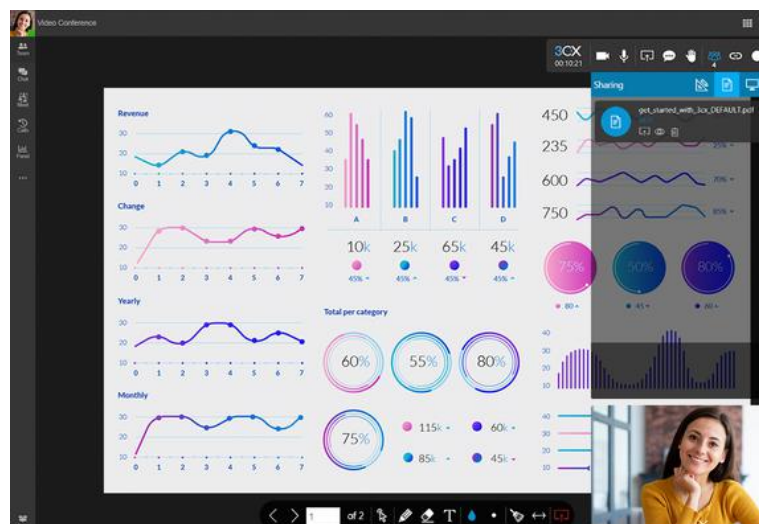
SCHEDULING A CONFERENCE

## SCHEDULING AN AUDIO OR VIDEO CONFERENCE FROM YOUR 3CX MOBILE APP

SCHEDULING AN AUDIO OR VIDEO CONFERENCE FROM THE 3CX MOBILE APP

Open your **3CX mobile app** and tap the **3 horizontal lines** (≡ 3CX) in the upper corner of the app.

Press **'Schedule'** to create a new conference invite. Type in your subject line, enter a date/time, and confirm the remaining default field settings.

To enable video conferencing, **slide Video to 'on.'**

Tap **'Save'** to move to the next screen.
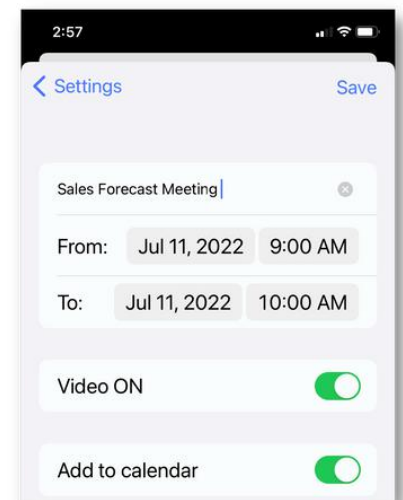
Next, **confirm all settings** on the Event screen.

Choose your **calendar** and add the **video conference URL*** (if it does not auto populate).

NOTE: *The video meeting link can be located in the 3CX web client the under Meetings icon.*

Tap **Add** to save the invite to your calendar.* Open your mobile calendar app, add attendees to the calendar invite and press send.

NOTE: *Meeting invites are processed through your mobile calendar app, not 3CX. Open your **mobile calendar app** to add attendees to this invite.*
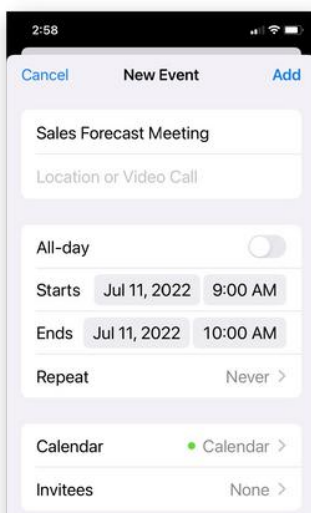
NOTE: Webinars can only be scheduled via the 3CX web & desktop clients (not mobile app). To access these clients, please refer to your 3CX Welcome email for more information.
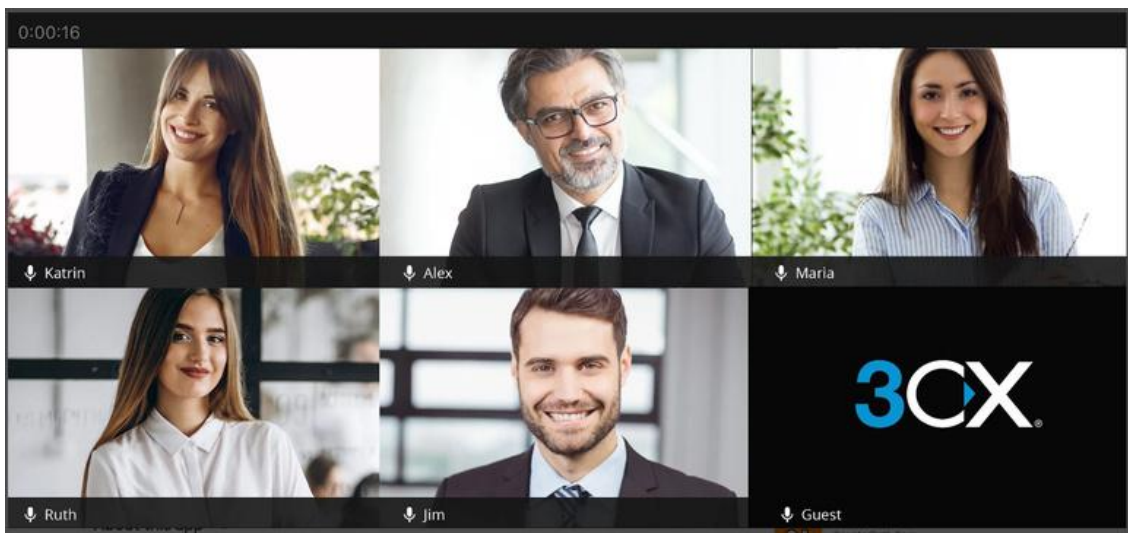
JOINING A CONFERENCE

JOIN A PRE-SCHEDULED AUDIO OR VIDEO CONFERENCE FROM YOUR 3CX MOBILE APP

HOW TO JOIN A MEETING FROM THE 3CX MOBILE APP

Open your **3CX mobile app** and tap the **3 horizontal lines** (☰ 3CX) in the upper corner of the app.

Tap **Meetings**. A list of your active and scheduled meetings will be displayed. Click on the desired meeting then click **Join**.*

Audio Meeting: *If the meeting was scheduled as an audio-only conference, then the app will auto-dial in to the conference for you.*

Video Meeting: *If the meeting was scheduled as a video conference, then the meeting will auto-open in the 3CX Video Conferencing app and pre-populate the meeting link. Click **Join Now** to join the video conference.*
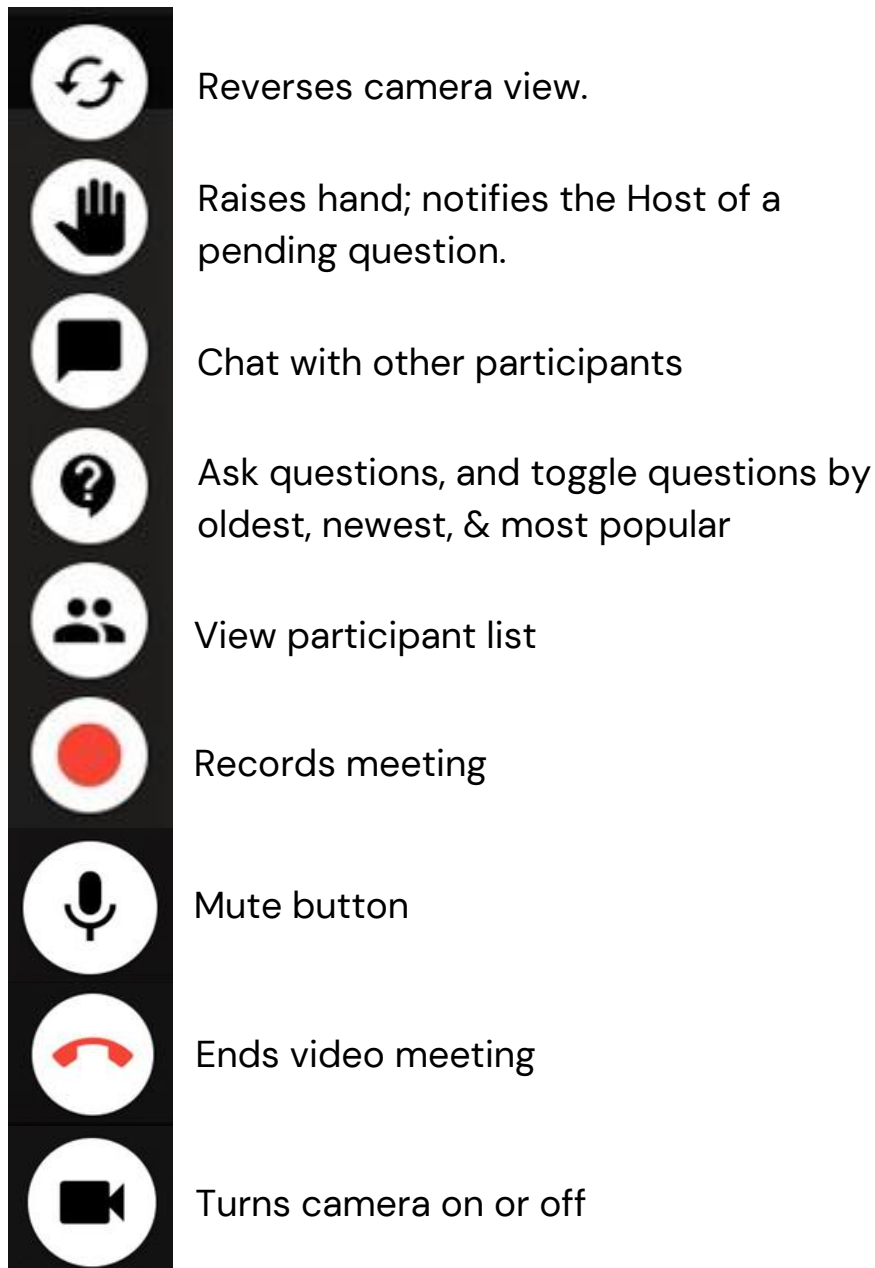
REMINDER: *Download the 3CX Video Conference App from your iOS or Android app store. The **3CX Video Conference app is a separate app specifically used for video conferencing.***

ACCESSING VIDEO CONFERENCE FEATURES WHILE USING THE MOBILE APP

Important Reminder: *The 3CX Video Conference app is a separate app used specifically for video conferencing. Download the 3CX Video Conference app from your iOS or Android mobile app store.*

3CX VIDEO CONFERENCE APP FEATURES

To access the video conferencing options while using the 3CX Video Conference app, **tap anywhere on the screen**. The follow options will populate:

Reverses camera view.

Raises hand; notifies the Host of a pending question.

Chat with other participants

Ask questions, and toggle questions by oldest, newest, & most popular

View participant list

Records meeting

Mute button

Ends video meeting

Turns camera on or off

CANCELING OR SAVING A MEETING

LEARN HOW TO:
- **HOW TO CANCEL A PRE-SCHEDULED MEETING**
- **SAVE YOUR RECORDED MEETING**

CANCELING A MEETING FROM THE 3CX MOBILE APP

Open your **3CX mobile app** and tap the **3 horizontal lines** (≡ 3CX) in the upper corner of the app.

Tap **Meetings**. A list of your active and scheduled meetings will be displayed.

Swipe left to **delete** the meeting. Click **Delete** again to confirm the permanent deletion of the meeting.

3CX will populate an email to send to participants to notify them that the meeting has been canceled; however, **it is** strongly recommended **to cancel the meeting through your** mobile calendar app **to ensure deliver of the cancelation was successfully received.**

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

SET PRESENCE STATUS & CALL FORWARDING

Call forwarding & **presence status** are controlled by your personal profile using the 3CX clients. To forward calls and set your presence status from your 3CX mobile app, click the **green square** in the upper right corner.

Select a '**Status**' by tapping the **arrow (>) or edit icon** on the status you wish to change. You can also set your status changes to auto-revert by pressing the '**Set Status Temporarily**' option.

Type a custom status message and choose to forward calls to an external number, voicemail, another extension, etc. Click **Apply** to save your changes.

NOTES:

You can update the call forwarding attributes for each type of presence status from the mobile app (i.e.- Available, Away, Do Not Disturb, Lunch, Business Trip, etc.).

Each status must have its own call forwarding attributes set for internal and external calls. *Contact your System Administrator for more information.*


DO NOT DISTURB

Do Not Disturb (DND) is also controlled by your personal profile using the 3CX clients.

To activate **Do Not Disturb** from the 3CX mobile app, click the **green square** in the upper right corner.

Click the **arrow (>) or edit icon** next to Do Not Disturb to set your DND away message and activate call forwarding, if applicable.

To remove DND, follow the same process but **click 'Available' status** from the same screen.
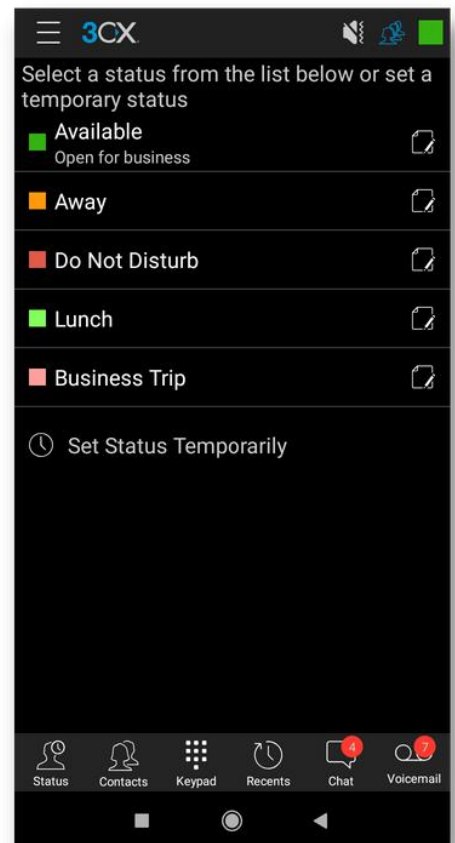
PARK & RETRIEVE A CALL USING SHARED PARK KEYS

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, press the <u>Transfer button</u> (do not use the Att. Transfer option) on your app.

<u>Type SPx--replace the "x" with the park orbit number</u> 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 <u>typing the park orbit number</u> (ex- SP1), press the <u>green Transfer button</u> 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 is parked (ex- SP1, SP2, SP3, etc.).

To Retrieve a Parked Call:
To retrieve a parked call from your mobile app, access your <u>keypad</u> and t<u>ype the SPX park orbit number</u> (replacing the "x" with the parked orbit number (ex-SP1, SP2, SP3, etc.) where the call is being held. Click the <u>green call button</u> to retrieve the parked call.

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

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

ALL CALL PAGE ANNOUNCEMENT

Dial the 'All Call' paging 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 to obtain the ALL CALL Extension Number.

VIDEO CALL

Dial a phone number or extension number and press the call button. Once the user answers the call, **click the video icon** on the keypad to convert your call to video.

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/.

PLEASE CONTACT OUR SUPPORT DEPARTMENT VIA CALL OR TEXT AT 410-423-6500, OR EMAIL 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!

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