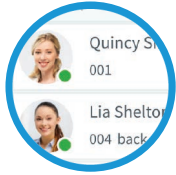## 01 Your Communications Dashboard - The 3CX Web Client
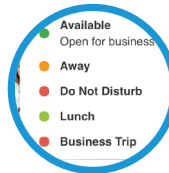

Logging in

1. Retrieve your credentials from your Welcome Email.

2. Go to your Web Client URL, https://parkschool.east.3cx.us:5001/webclient

3. Log in using your extension and password

   You should change your password from the temporary one provided to you in your welcome email. Can't find your welcome email? Email techsupport@parkschool.net and we will send it to you again.
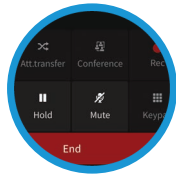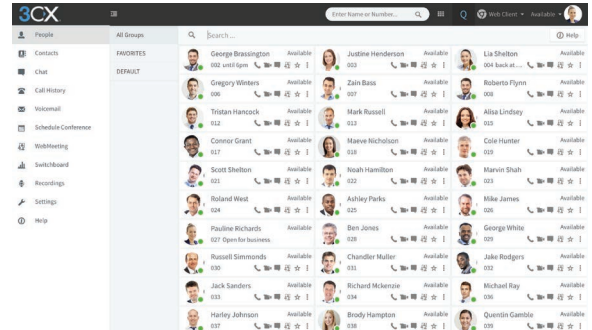
Make, Receive & Transfer Calls

1. Make a call by clicking on an extension or enter name/number in the search box.

2. Toggle the phone icon to trigger a call on your smartphone, deskphone or web client.

3. Transfer a call by clicking **"Transfer"** or **"Att. Transfer"**, enter the extension or name.
   a. If Att. Transfer announce the call and click **"Transfer"**.
   b. To blind transfer click **"Transfer"** and hang up.

Manage your Status

- **Available** Open for business
- **Away**
- **Do Not Disturb**
- **Lunch**
- **Business Trip**

1. Set your status and status message by clicking on the drop down menu next to your avatar.

2. Click on the pencil to add a status message.

3. Set status temporarily to time limit your status automatically.

4. Green means available, yellow on a call, red is busy - calls will be diverted to voicemail.
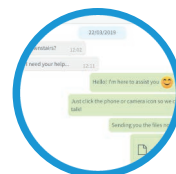
Chat with your Colleagues

1. Click on the **"Chat"** function.

2. Click on the **"Compose"** icon to search and add people for one-on-one or group chat.

3. Select the extension(s) and click **"OK"** to start chatting.

02 Your Office Anywhere - The 3CX Apps

Download the iOS or Android Apps

‣ Open your welcome email.

‣ Open the app on your device, tap on the menu (top left) and then **"Scan QR Code"**.

‣ Now scan the QR code from your welcome email - done.

To transfer a call

‣ Click **"Transfer"** or **"Att. Transfer"**.

‣ Enter the extension or search by name, tap **"Transfer"** and hang up.

‣ If Att. Transfer announce the call and click **"Transfer"**.

Download the Windows or Mac Apps

‣ Open your welcome email.

‣ Download the attachment and double click on it.

‣ The app will then automatically configure itself.

03 Using Your Deskphone

To make a call

1. Dial the number on the keypad and hit the send or enter button.
2. OR select a contact or extension from your Web Client or a number from a web page, hit call.
3. The Web Client triggers the call on your deskphone if selected via the phone selector toggle.

To transfer a call

1. **For blind transfer:** Press **"Transfer"**, dial the extension, press send/dial and hang up.
2. **Attended transfer Yealink:** Press **"Transfer"**, dial number or select extension, press **"Send"**, announce the caller, press **"Transfer"** and hang up.
3. **Attended transfer Snom:** Press the **"Hold"** button and dial the extension you want to transfer to. Announce the call and press **"Transfer"** followed by send/dial and hang up.

04 Voicemail
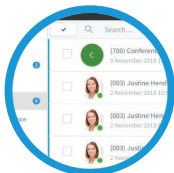
Setting your Voicemail Greeting

1. **By phone:**
   a. Dial "**5000**" (or press the "**MESSAGE**".
   b. Enter your PIN and then press **"#"**.
   c. Select option **"9"**, then **"8"** and then **"0"** to record.
   d. Press **"#"** to end recording and **"0"** to save.

2. **From the Web Client:**
   a. Go to **"Settings"** > **"Greetings"**.
   b. From here you can set a greeting according to your status.

To Playback Voicemail

1. **By phone:**
   a. Dial "**5000**" or hit "**MESSAGE**"
   b. Enter your PIN, press **"#"** and then **"*"** to play your messages.
2. **Web Client:** Click on **"Voicemail"** and click the playback icon to listen to the message on your selected phone.
3. **Android & iOS App:** Tap on the burger menu, select **"Voicemail"**, tap on the voicemail and select **"Play"** to listen to the message.
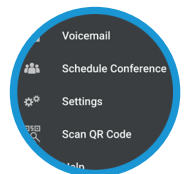
05 Scheduling an Audio/Web Conference

Creating an Audio Conference

1. Tap or click on **"Schedule Conference"** (in the top menu for smartphones).
2. **"Enable Announcements"** to get notified when participants join.
3. Add the **"Subject"** and **"Notes"**.
4. Specify the preferred time.
5. Hit **"Create Meeting"** (Web Client) or **"Done"** (Android & iOS) and add participants.
   a. Participants will receive an invitation email with an external dial-in number and a PIN.
   b. Internal participants will receive an email with an extension and PIN or be called.

Creating an ad-hoc Web Conference

1. Click on **"WebMeeting"** in the web client.
2. Allow WebMeeting to use the camera and microphone.
3. Click on **"Invite People"** on the right panel to add participants.