



**breakfree**  
with a software based PBX for Windows



# Extension Manual

**3CX Assistant, User portal, Dial  
codes & Voice mail for 3CX Phone  
System**

**Version 7.1**

Copyright 2006-2009, 3CX Ltd.

<http://www.3cx.com>

E-mail: [info@3cx.com](mailto:info@3cx.com)

Information in this document is subject to change without notice. Companies' names and data used in examples herein are fictitious unless otherwise noted. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of 3CX Ltd.

3CX Phone System for Windows is copyright of 3CX Ltd.

3CX is a registered trademark, and 3CX Phone System for Windows and the 3CX logo are trademarks of 3CX Ltd. in Europe, the United States and other countries.

Version 7.1 – Last updated 18 February 2009



# Table of Contents

Introduction to 3CX Phone System .....	7
What is 3CX Phone System for Windows? .....	7
Benefits to an extension user .....	7
3CX Assistant .....	9
Introduction .....	9
Installing 3CX Assistant.....	9
System requirements .....	9
Running Setup .....	9
Configuring 3CX Assistant.....	10
Using 3CX Assistant.....	10
Calls.....	10
Extensions.....	11
Queues.....	12
Logging into a Call Queue .....	12
Specifying Away/Available status.....	12
General options.....	13
Notifications.....	13
View.....	13
Call Filtering .....	14
Voice Mail.....	15
Introduction .....	15
Retrieving voice mail by phone .....	15
Receiving voice mail in your email inbox.....	16
The User Portal.....	17
Introduction .....	17
Logging in .....	17
Extension Settings .....	17
Voice Mail Settings .....	18
SIP Authentication .....	18
Forwarding Rules.....	19
Set your Status .....	20

The 3CX VOIP phone.....	21
Introduction .....	21
Download and Documentation .....	21
Dial codes .....	23
Introduction .....	23
Call pick-up.....	23
Call Parking.....	23
Voicemail.....	24
Specifying Away / Available status .....	24
Logging in to the Queues.....	24
Intercom .....	24
Conferencing.....	25
Introduction .....	25
Creating a call conference.....	25



## 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
- Forward calls based on caller ID, time and type of call
- Quickly launch missed calls
- View an automatically updated extension number list
- Transfer incoming calls to any user with a few mouse clicks





## 3CX Assistant

### Introduction

The 3CX Assistant is a compact utility which allows you to easily manage your extension with a few mouse clicks – rather than via a cryptic and limited phone interface.

3CX Assistant is not a phone – it works in tandem with an existing IP hardware phone, soft phone or even an analog phone. Calls are made and answered on your existing phone. 3CX Assistant provides the following functions:

1. **Call Pop-up** - Upon an incoming call, a small dialog will pop up, which allows you to reject a call or transfer a call to another person or to voice mail - with a single mouse click or using drag and drop.
2. **Easy Call Transfer / Park** - When on a call, you can transfer or park a call with a few mouse clicks, no need to learn dial codes or call transfer procedures on a phone.
3. **Presence** - The status of the other extensions is shown, allowing you to avoid unnecessary calls or call transfers to colleagues.
4. **Click to Call** - Launch calls with a mouse click – double click on an extension to call the person, or enter a number with your number pad. The call will be connected and your phone will ring
5. **Queue monitoring** - View the status of queues that you are a member of. You will see callers waiting in the queue and be able to take a call from the queue.

3CX Assistant will show different information based on whether you are a standard user, a departmental manager or a company manager. In department manager mode you will see calls from anyone in your department. In management mode you will see information of the entire company. These rights are set by the Phone System administrator.

### Installing 3CX Assistant

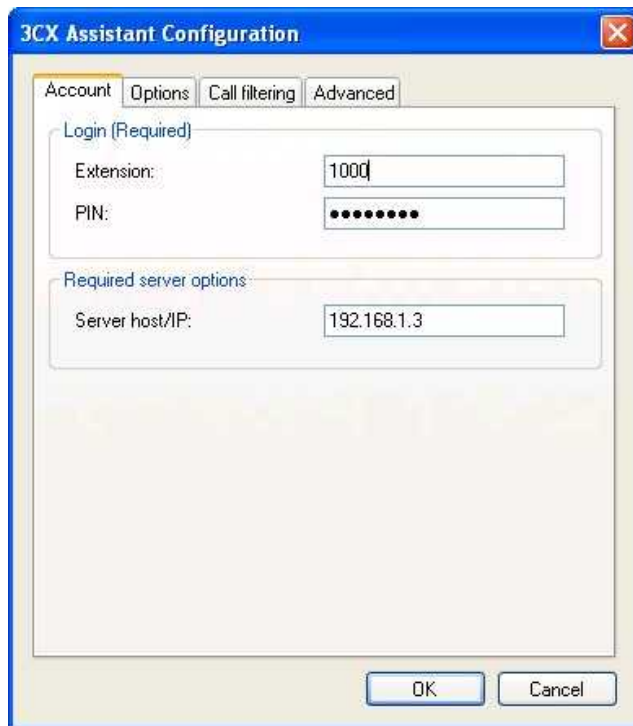
#### System requirements

- Windows XP, Vista or higher
- .NET 2.0 framework or higher. Most Windows installations have this already installed. Check by going to Control Panel > Add/Remove Programs. If not, the latest .NET framework can be downloaded from the Microsoft website at <http://msdn.microsoft.com/en-us/netframework/>

#### Running Setup

1. Download 3CX Assistant here  
[http://www.3cx.com/downloads/3CXAssistantSetup\\_71.exe](http://www.3cx.com/downloads/3CXAssistantSetup_71.exe)
2. Execute setup and follow the wizard

## Configuring 3CX Assistant



**Screenshot 1 - 3CX Assistant configuration**

The first time you start 3CX Assistant, you must enter your extension details:

1. In the login section, enter your extension number and your voice mail pin number (By default the PIN is the same as your extension number). You can change this from your voice mail menu or from the user portal.
2. In the Server options section, specify the IP of the 3CX Phone System machine. Click OK.

## Using 3CX Assistant

The 3CX Assistant window is split up into 3 sections: Calls, Extensions and Queues

### Calls



The calls section shows all active calls, divided into

- Personal calls – shows any active calls that you are on
- External calls – shows any external calls being made in the system (requires management rights)

- Queue calls – shows any callers in queues
- Parked calls – shows calls that have been parked

You can right - click on any active call and perform one of the following actions

- Reject – hangs up call
- Divert – diverts a call to another number. Divert is available when a call is ringing.
- Transfer – transfers a call to another extension. This option is available after you have picked up a call. You will be prompted for an extension number
- Park – park the call so that another user can pick up the parked call
- Voice Mail – transfer the call to your voice mail – caller will be able to leave a message

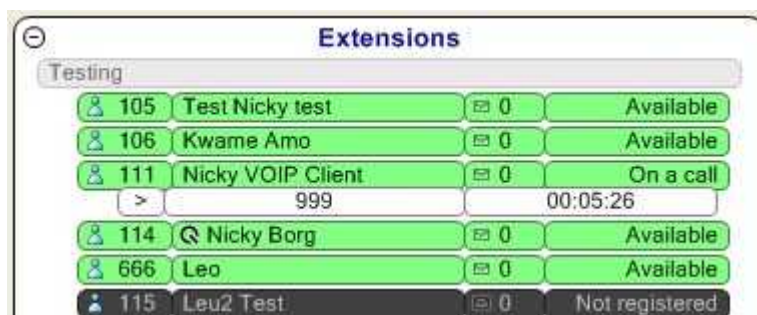
You can also Drag and drop a ringing or connected call to

- Other extensions,
- Queues
- Parking orbits (Connected Calls only)
- My calls (Essentially performing a pickup)

The call icon displayed will change depending on where you hover the call to. The action will be performed when the mouse is released.

For example, if you hover a call on the Parked Calls section, the mouse pointer will change to the P Icon which refers to Park. If you try and transfer a call to an illegal position (for example transferring a call to your own extension) the mouse cursor will change to show the Not Allowed Sign.

## Extensions

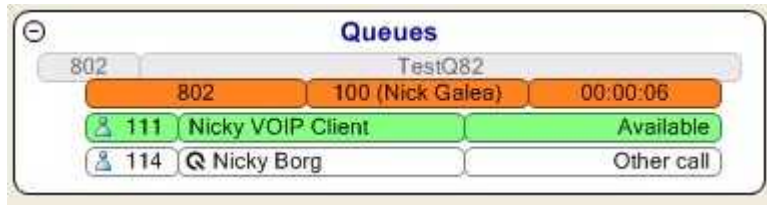


The extensions section of 3CX Assistant lists all extensions and shows their status. You can call an extension by double clicking on the extension. The following extension states are possible:

- Available – green – User is not on a call and is available
- Away – red – User is not able to take a call
- On an internal call – light blue – user is making an internal call

- On an external call – orange – user is on an external call
- Ringing – yellow – the users phone is ringing
- Not registered – grey – user does not have an phone registered to take calls

## Queues



The Queues section shows all queues, and any agents that are logged in to take queue calls. Calls that are waiting in queue will be shown at the top of the Queue. The time that the caller is in the queue will be shown after the Caller ID of the caller.

To pickup a call that is waiting in the queue, click on the call and select 'Pickup' from the menu. Alternatively right click on the call and select 'Pickup'.

## Logging into a Call Queue

3CX Phone System has a powerful feature called Call Queues, which allows callers to be queued until any of the agents can take the call. The actual configuration of who is an agent is done from the 3CX management console. If you are an agent for a queue, you need to login to the queues to let the phone system know that you are available to 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:

- Click on the 'Login Queue' button on the toolbar
- Alternatively select Action > Queue > Login to all Queues from the menu.

To logout, select Action > Queue > Logout of all Queues or click on the same icon.

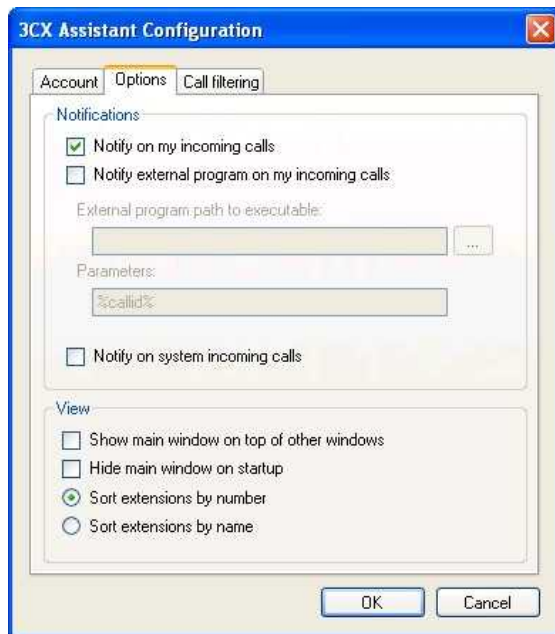
## Specifying Away/Available status

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.

All calls that get sent to your extension will be handled 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 close 3CX Assistant!

## General options



**Screenshot 2 - 3CX Assistant options**

You can customize 3CX Assistant from the configuration dialog. This is accessed from the File > Configuration menu. You can customize the following:

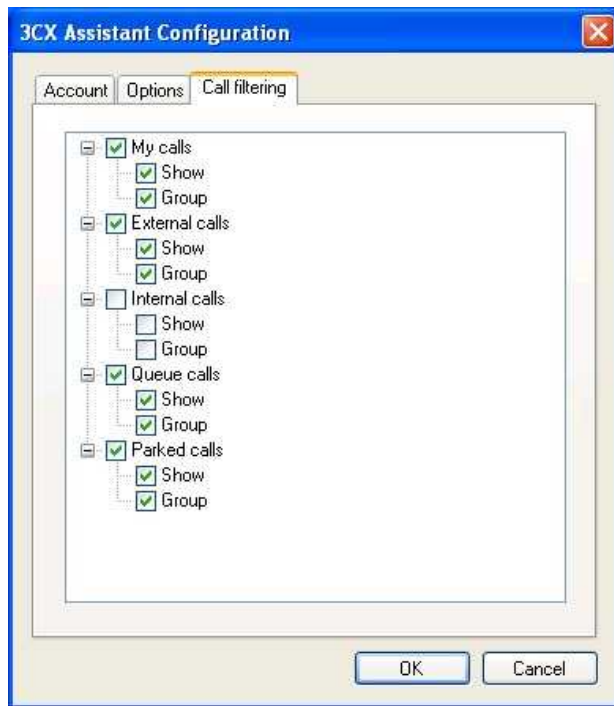
### Notifications

- Notify on incoming calls – this will pop up a dialog on your desktop notifying you of the call and allowing you to reject or transfer it.
- Notify external program – optionally you can run an external program that performs certain actions on inbound calls, for example pop up a customer record. Select the program executable and any optional parameters to enable this function.
- Notify on system incoming calls – this option will notify you of ALL calls coming into the phone system

### View

- Show main window – window will remain on top
- Hide main window – automatically minimize on startup
- Sort extensions by name or number

## Call Filtering



**Screenshot 3 - Call Filtering options**

The Call filtering dialog allows you to configure which calls to show in the My Calls section of 3CX Assistant. You can show/hide the entire group (show option) and its respective calls and you can also show/hide the group header (group option) but still show the respective calls.

## 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:

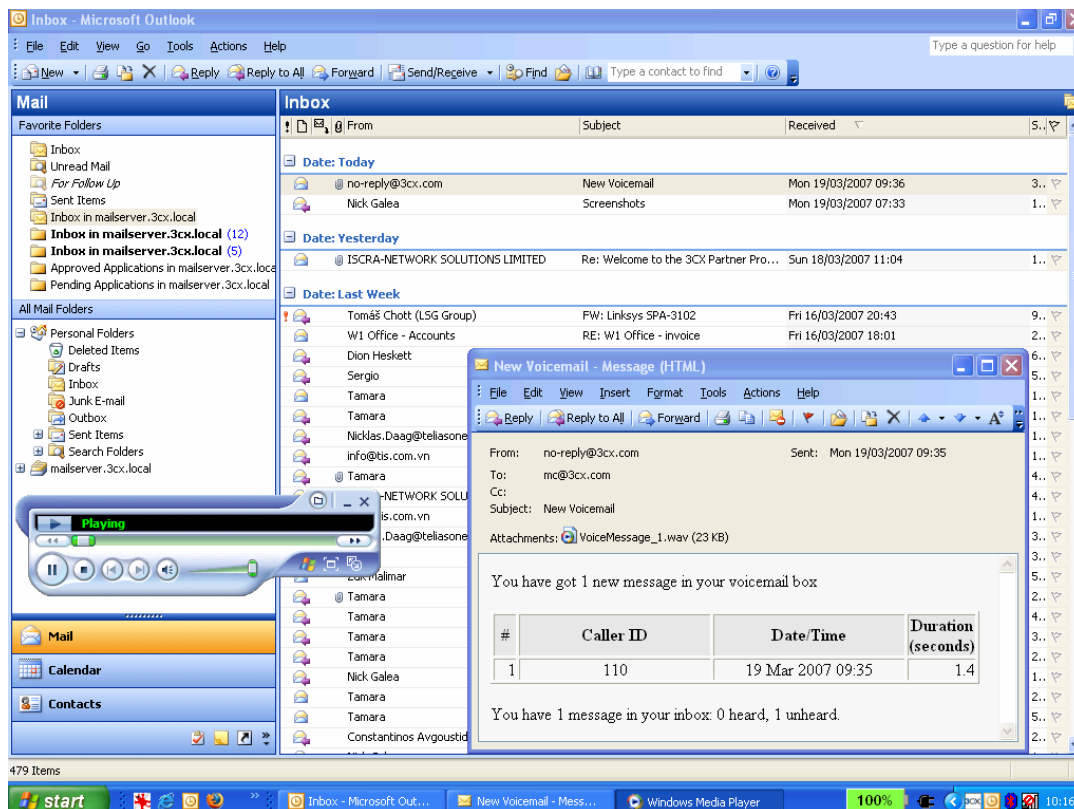
1. Dial the voice mail system extension - 999. If you are outside the company, you can dial this number from any digital receptionist menu.
2. Enter your extension number and when prompted your pin number. Press pound #
3. A prompt will be played with the number of read and unread messages in your voice 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:

- 3 – to dial an external number or internal extension

- 4 - to delete all messages
- 5 – To record your name (used for call by name)
- 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 4 - 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 you to modify your extensions options. For example you can configure what the phone system should do if you are unavailable, on a call or away from the office.

### Logging in

3CX Login to 3CX User Portal  
3CX Phone System v7.0.3053.0

Language: English

User Login: 100

Password: ●●●

Login

© 2008 Copyright 3CX Ltd.

#### Screenshot 5 - Portal login

To login to the user portal:

1. Launch your web browser and navigate to:

`http://<phone-system>/Myphone/`

Where <phone-system> is the name or IP of the phone system.

Note, in some installations, this maybe `http://<phone-system>:5000`

2. Specify your extension number and PIN and click 'Login'. After successful login, your current settings will be shown.

### Extension Settings

Extension Settings | Voice Mail Settings

**Extension Number**

First Name	Joe	?	PIN Number	100	?
Last Name	Bloggs	?	Outbound Caller ID	23100	?
Email address	jb@3cx.com	?			
SIP ID	100	?			

OK Cancel Apply

#### Screenshot 6 - Extension Settings

In the tab 'Extension Settings, you can configure your extension and voice mail settings.

You can configure your name, email address, pin number and outbound caller ID. The PIN number will be used to authenticate to the voice mail system as well as the user portal. The outbound caller ID will be shown on your outbound calls. Note that this setting might be overridden by the telco provider.

## Voice Mail Settings

The Voice Mail Settings tab allows you to configure your voice mail options

Extension Number	
Enable voice mail	<input checked="" type="checkbox"/> ?
Play Caller ID	<input type="checkbox"/> ?
Play Message times	Do not read ?
Email options	No email notification ?
Pin number	100 ?

OK Cancel Apply

### Screenshot 7 - Voice Mail Settings

You can configure the following options:

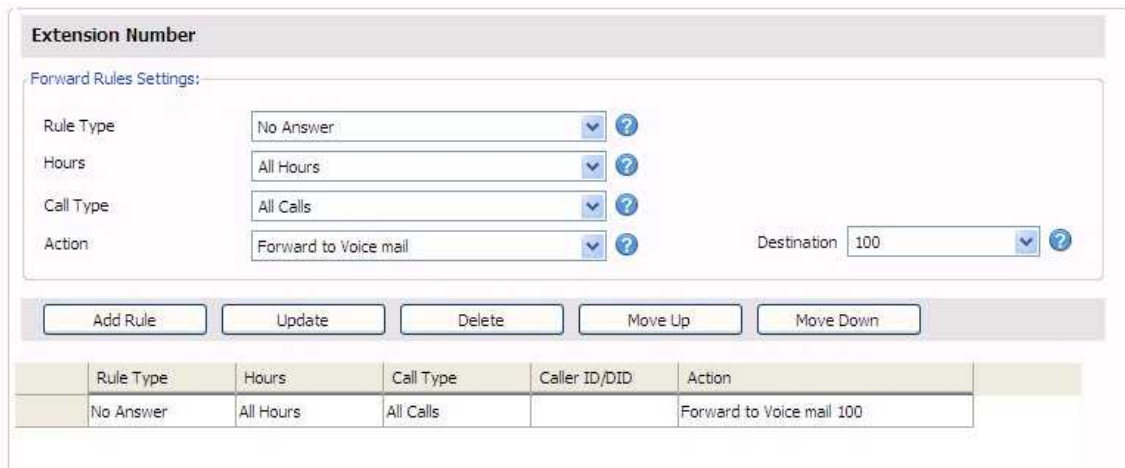
- Enable or disable Voice Mail
- Play Caller ID of person who left the voice mail
- Configure whether to play message times or not
- Specify whether you want to have voice mail delivered via email or not.
- Optionally change your PIN. (This PIN is used to login to the portal as well)

## SIP Authentication

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. 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 unless you are familiar with this setting!

## Forwarding Rules

Using the forwarding rules feature, you can configure exactly what should happen to calls when an extension is busy, a call remains unanswered or when an extension is unregistered. You can also make forwarding rules based on the time that the call was received and the caller ID of the caller.



Rule Type	Hours	Call Type	Caller ID/DID	Action
No Answer	All Hours	All Calls		Forward to Voice mail 100

### Screenshot 8 – Forwarding Rules

To create a forwarding rule;

1. In the Forwarding rules tab, select a rule type, which defines to which calls this rule will apply:
  - No Answer – You will need to specify the time in seconds that you want the system to wait before it considers the call unanswered. This option can be set in the ‘Continue Ringing’ edit box at the bottom of the screen. This setting will apply to all ‘No Answer’ rules.
  - Phone Busy - You will 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 an extension is busy, you will need to specify “Use PBX status” in the busy detection list box.
  - Phone not registered – If the SIP phone has not registered with 3CX Phone System (i.e. is turned off), then the phone is considered unregistered and the rule will kick in
  - Forward all Calls – This rule will forward ALL CALLS
  - Based on Caller ID – You can handle calls from specific callers by specifying their caller ID.
2. You can now specify a particular time during which hours this rule must apply. You can configure the rule to be valid all the time (All Hours), during or outside office hours (Relies on system wide office hours setting) or during specific hours (In this case you can configure the specific hours using the ‘Specific hours’ button)

3. Specify the Call Type - Whether this rule should apply to all calls, or only internal or external calls
4. Specify the Action that the rule should take:
  - End Call
  - Forward to voice mail
  - Forward to extension –Specify the extension to forward to 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.
  - 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.
5. Once you have filled out all necessary fields, click on the 'Add' button to create the new rule. You can order the priority of the rules by moving rules up or down. The first rule that meets the conditions will be triggered!

## Set your Status

▶ **Set your status**  
Configure whether you will accept calls to your extension and whether you are able to take calls from Queues you are member of.

Extension Number	
Set Your Status	Available <input type="button" value="v"/> <input type="button" value="?"/>
Set Queue Status	Logged Out <input type="button" value="v"/> <input type="button" value="?"/>

### Screenshot 9 - Status

In this page you can set your status:

- **Set Your Status:** 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.
- **Set Your Queue Status:** You can login and logout of the Queues. To receive calls from any of the queues, you must be logged in to the queues.

## The 3CX VOIP phone

### Introduction



**Screenshot 10 - The 3CX VoIP Phone**

The 3CX VOIP phone is a small Windows application that allows you to make and receive calls using a headset connected directly to your computer. 3CX VoIP Phone is easy to install and use, and can connect to 3CX Phone System using the 3CX Tunnel. It can be used at the same time as a desk phone (i.e. both the soft phone and the hard phone can be registered using the same extension number) This is an optional installation.

### Download and Documentation

You can download the VoIP phone at:

<http://www.3cx.com/downloads/3CXVoIPPhone3.msi>

The manual can be found at



## 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>**

This will redirect the active call from the specified extension to your extension.

You can also retrieve a call from a ringing extension without specifying the extension number. To do this, type \*20\* followed by the send key. This will redirect the first available active call to your extension.

### Call Parking

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

**BLIND TRANSFER BUTTON \*00 to 09 – to park the call.**

For example \*01 will place the call in the parking orbit 1.

**\*10-9 – to pick up a parked call.**

For example \*11 will pick up any calls parked in parking orbit 1

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.

For example: If extension 100 parked a call in park 0, this call can be picked up by extension 101 by keying in \*10100

Some examples to park a call with popular phones:

- With a Grandstream phone, press the TRNF button and dial \*00
- With a Snom phone, press the TRANSFER button and dial \*00
- With a Polycom phone, press the TRANSFER button, from the screen, then choose the option BLIND and then dial \*00
- With a Cisco phone, choose "more" option on the screen, choose BlndXfr and dial \*00
- With a Linksys phone, press the right arrow key on the navigation button for more options and then choose bxfer and dial \*00

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

### Voicemail

To leave a message in a Voicemail box of a particular Extension;

#### Dial \*4{ext}

For example, \*4100, will leave a voicemail message in the voicemail box of extension 100

### Specifying Away / Available status

To specify away or available status for a particular extension:

Dial \*60 to set the extension as **available**

Dial \*61 to set the extension to **away**

*Note: Away and Available are only available in commercial editions of 3CX Phone System*

### Logging in to the Queues

To log into a queue;

Dial \*62 to **log** the extension **into** all the Queues that the extension is a member of.

Dial \*63 to **log** the extensions **out** of all the queues to which the extension has logged in.

*Note: Queues are only available in commercial editions of 3CX Phone System*

### Intercom

The intercom feature allows a phone system user to make an announcement to another extension without requiring the other party to pick up the handset. The message will be played via the phone's speaker. The audio is two way, and the called party can respond immediately without picking up the handset.

To call a user via the intercom function:

Prefix the extension you wish to call with \*9, followed by the extension. For example to make an intercom call to extension 100 you should dial:

**\*9100'**

Note: The intercom features require a phone that supports intercom and that is configured to allow it. Check with your administrator if in doubt.



# Conferencing

## Introduction

Call conferencing allows you to easily setup a conference call for up to 32 callers (license permitting). Although many conference call services exist, it's often easier and cheaper to host your own audio conferences.

Conferences can be set-up ad hoc, without the need to reserve a conference room. This has been done to simplify the set-up of conference calls.

## Creating a call conference

To setup a call conference;

1. Dial the conference extension number, by default this is 700
2. You will be requested to enter a conference ID. This can be any number, for example '100'. All callers that wish to join the conference must use the same conference ID!
3. If you are the first participant, the conference system will ask you to confirm creation of the conference. Press \* to confirm or # to cancel
4. You will be asked to speak your name after the beep and press a button to continue.
5. You will now enter the conference. If you are the first caller, you will hear music on hold, whilst you wait for the other callers. As soon as another caller joins, his name will be announced.