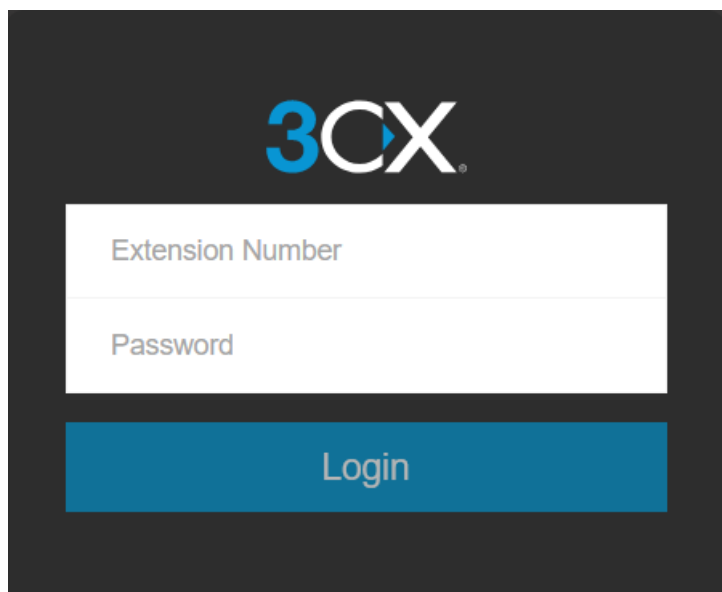# 3CX Quick Start Guide

The 3CX Web Client is easy to use and combines all the features you need to efficiently communicate, collaborate, and connect with colleagues, partners, and customers, straight from your browser or from the native Windows desktop app. From this one interface, you can easily make and receive calls, view the status of colleagues, live chat, and hold video conferences.

Let's get started: Logging in

1. Go to "**Your Cloud PBX User Account**" welcome email.
2. Click on your web client URL, e.g. https://mycompany.3cx.ie/webclient/
3. Log in using the credentials in your email.

Download the Desktop App

The Desktop app for Windows includes all the features of the web client but provides a more native experience. To download the app:

1. Click on the Windows icon ⊞ at the top of the side menu in the web client.
2. Follow the steps to install and provision the app.

Get the 3CX App for your Smartphone

Click on the QR code icon in the top right menu and follow the steps to get the 3CX iOS or Android App.
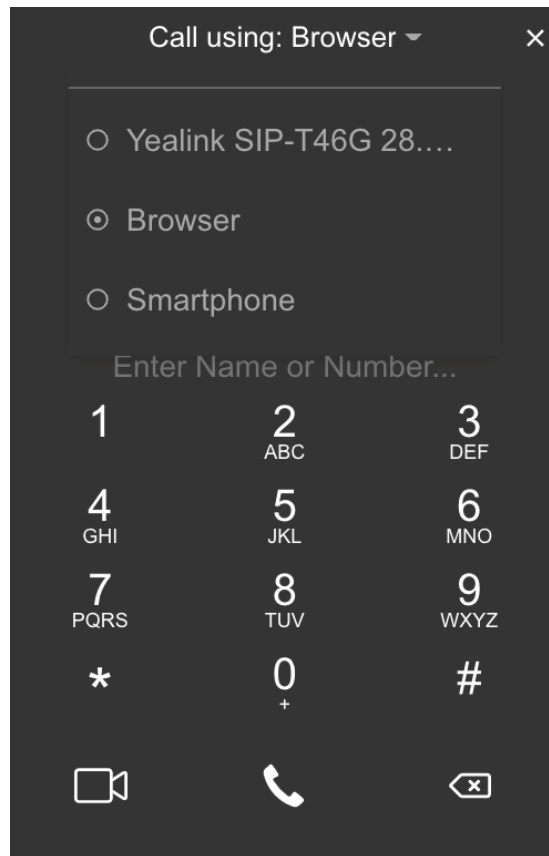
Start a call

To call, click on the phone icon in the top right menu to access the dial pad. Enter the phone number or search by name, extension number or email address. No need to dial '9' for an outside line like traditional phone systems. You can also copy and paste phone numbers into the dial pad.

Choose your device to place a call

You can seamlessly place calls from your IP deskphone, the iOS or Android app, web client or the desktop app - wherever you have provisioned your extension. From the phone selector in the web client's dialler, you can select your preferred device and control calls from the web client interface.
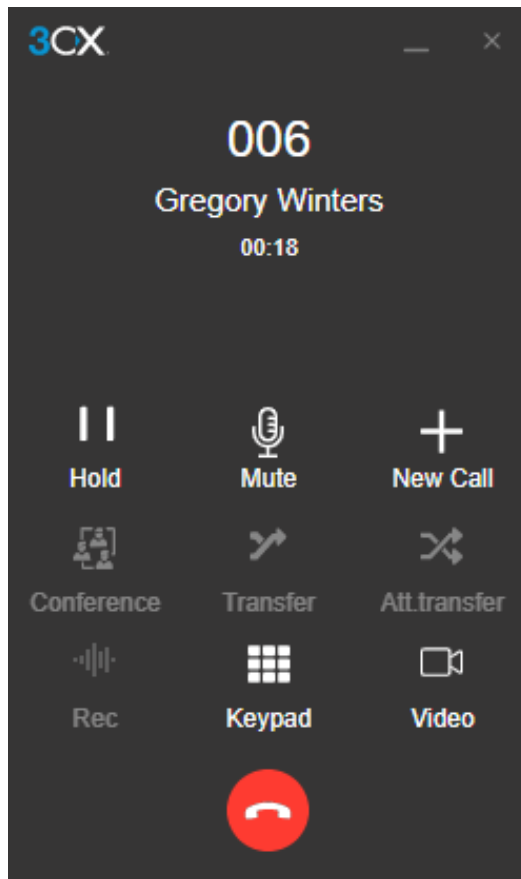
In-call functions

Once you're on a call, you can perform a number of actions with just a few mouse clicks.

Transferring a call

Click on "**Transfer**" and enter the name or number of the person you want to transfer the call to. The call is transferred without you speaking to the receiver on the other end - this is known as a blind transfer.

To speak to the receiver and get permission to transfer a call, click "**Att.transfer**". This will allow you to put the caller on hold and speak to the receiver before passing the call through. Click "**Join**" to complete the transfer – this is known as attended transfer.

Creating a conference call

Click the **"Conference"** button and enter the name or number of the person(s) you would like to add to the call. They will be dialled and upon answering, will be added to the existing call.

Recording a call

At any time during a call, you may record the conversation. Simply click "**Record**" to begin and click again to end the recording. Recordings can be accessed in the Web Client > "**Recordings**".

Note: The ability to record and to view/edit recordings depends on the permissions given to you by your administrator.
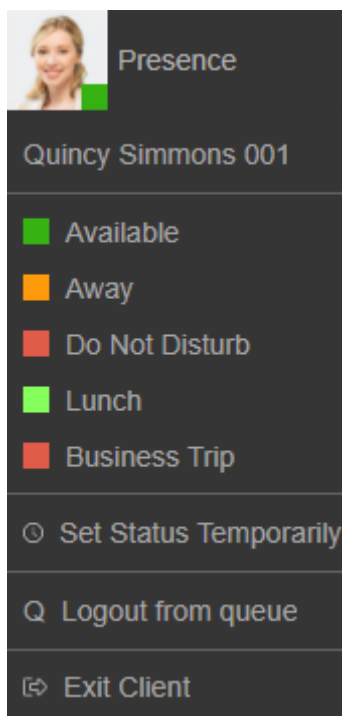
Initiating a new call

During an ongoing call, you may initiate a new call on a separate line without hanging up on the current call. To do this, click "**New Call**" and enter the name or number of the callee.

Switch to video call

During an ongoing call, you may elevate to a video call by clicking the "**Video**" icon in the dial pad, without hanging up on the current call.

Manage your status & queues

The "**Status**" feature allows you to see which colleagues are available to take calls. Avoid distractions and set your own status to let others know when you're away or you don't want to be disturbed.

- Click your avatar in the top left and choose from **Available**, **Away**, **Do Not Disturb**, **Lunch**, **Business Trip**.
- Your status changes to yellow when your line is busy.
- When status is set to "**Do Not Disturb**", calls will go straight to your voicemail.
- Click on your avatar to select "**Set status temporarily**" to time-limit your status.
- From this menu you can also login and out of queues.

Customize status message and behaviour by clicking on "**Avatar > Your Name > Status**".

Here you can:

- Set a custom message.
- Enable/disable "**Push Notifications**" for each status.
- Rename "**Lunch**" and "**Business Trip**" profiles.
- Set the number of seconds to activate forwarding of unanswered calls for "**Available**" and "**Lunch**" profiles.
- Choose to forward unanswered calls to options such as: Voicemail, mobile, etc.
- Override forwarding rules based on Caller ID and time of the call.

Top Tip: Turn off "**Push Notifications**" to prevent calls ringing on your smartphone app. This can be useful if you're working at your PC and don't want both ringing.

Voicemail
Set your voicemail Greeting via Web Client / Windows Desktop App

- Go to "**Avatar** > **Your Name** > **Greetings**".
- Record a new greeting or upload a pre-recorded message.
- You can have different greetings per status.
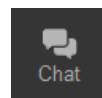
Set your voicemail greeting via Deskphone

- Dial **666**.
- Enter your **PIN** and then press "**#**".
- Select option "**9**" then "**8**" and then "**0**" to record.
- Press "**#**" to end the recording and "**0**" to save.

Listen to your voicemail messages

- From Smartphone: Tap on "**Voicemail**".
- From Web Client / Desktop App: Click "**…**" > "**Voicemail**".
- From Deskphone: Dial **666** or press "⊠", enter **PIN**, press "**#**" and then "*****" to play messages.

Chat with colleagues and customers

In the "**Chat**" section, you can send and receive instant messages with colleagues as well as live chat with customers on your website.

Start a video conference

In the "**Meet**" section, you can start a video conference or schedule a conference. Find out more about video conferencing and its features in the Video Conferencing manual.