

3CX[®] Web Client Guide



3CX Web Client User Guide

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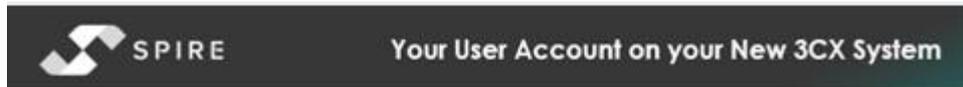
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Logging into the Web Client

To log into the web client, you will need your credentials that were sent to you in your welcome email. If you need this email again, please contact support@spiretechgroup.com.

Navigate to your Web Client URL on your email. You can find it next to your Web Client login which will look like the below image.



Hi Jon,

This email contains important information about your 3CX account. Read it carefully and save it for later use.



Your Extension

- Your extension number is 103
- Your extension's PIN is 6733
- Check your voicemail by dialing 666 and entering your PIN

Your Web Client Login

- Webclient URL: <https://spiredemo3cx.3cx.uk/webclient>
- Login using 103 and password AeGPzQsS8O

Copy and paste your password into the login box



A screenshot of a web browser window. The address bar shows the URL "spiredemo3cx3cxuk/webclient/#/login". The browser's tab bar shows several tabs: "Apps", "ISP", "Tools", "3CX", and "Personal". The main content area is dark grey and features a login form. The form has the "3CX" logo at the top, followed by a text input field containing "103", a password input field with masked characters ".....", and a blue "Login" button. To the left of the form, a white box with a black border contains the text "Click 'login'".

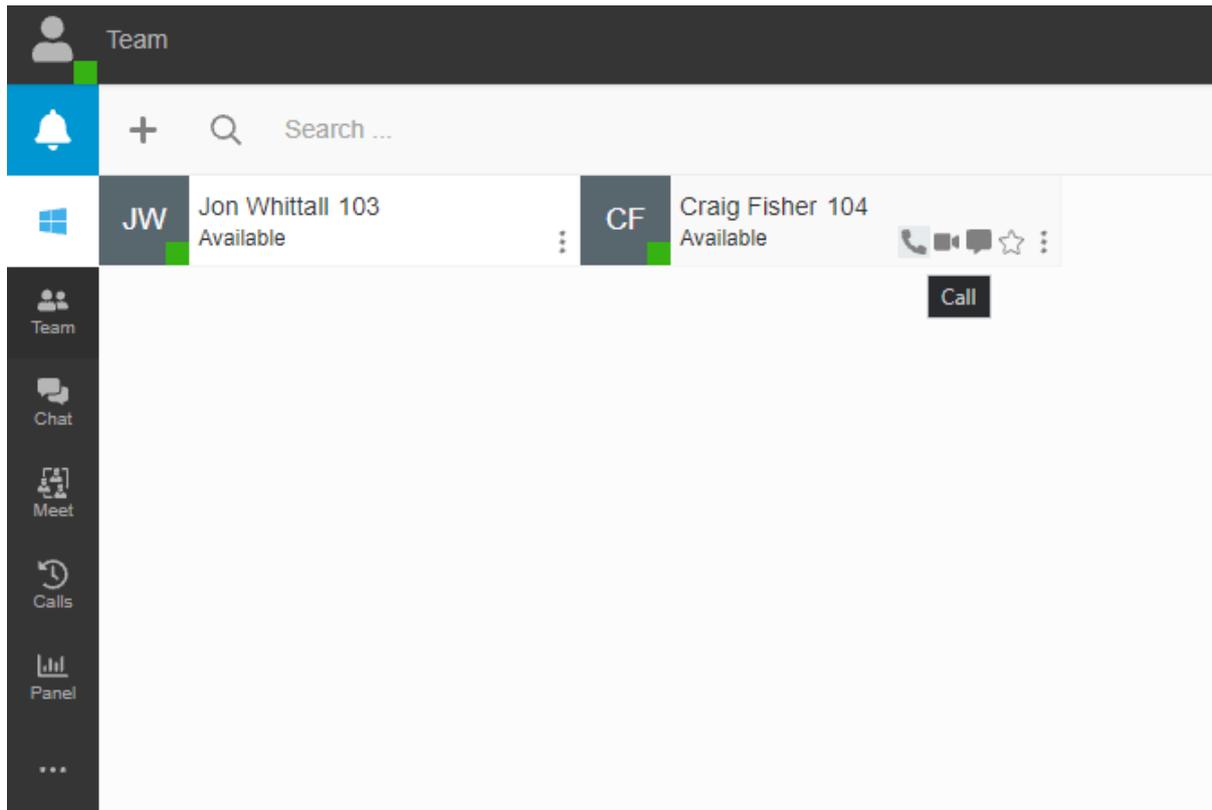


Making an Internal Call

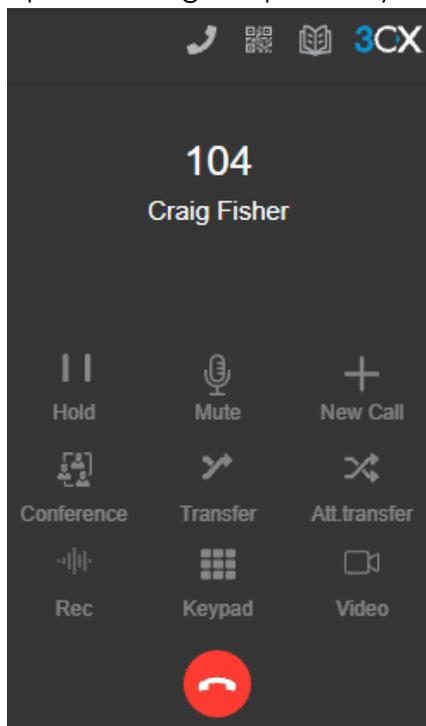
You can make an internal call several ways, but the easiest way is to find the user within the directory.

Click 'Team' on the left-hand side of the web client. Here it will list all extensions within the directory.

You can search for a user using the search box, or you can navigate the screen and find them listed. Hover over their name and click the phone symbol to make a call.



Upon clicking the phone symbol, you will see your dialler in the top right corner.



You may be asked to allow microphone and headset access to the website. Select 'Yes' to any permission prompts that appear. You will only be asked for permission once.

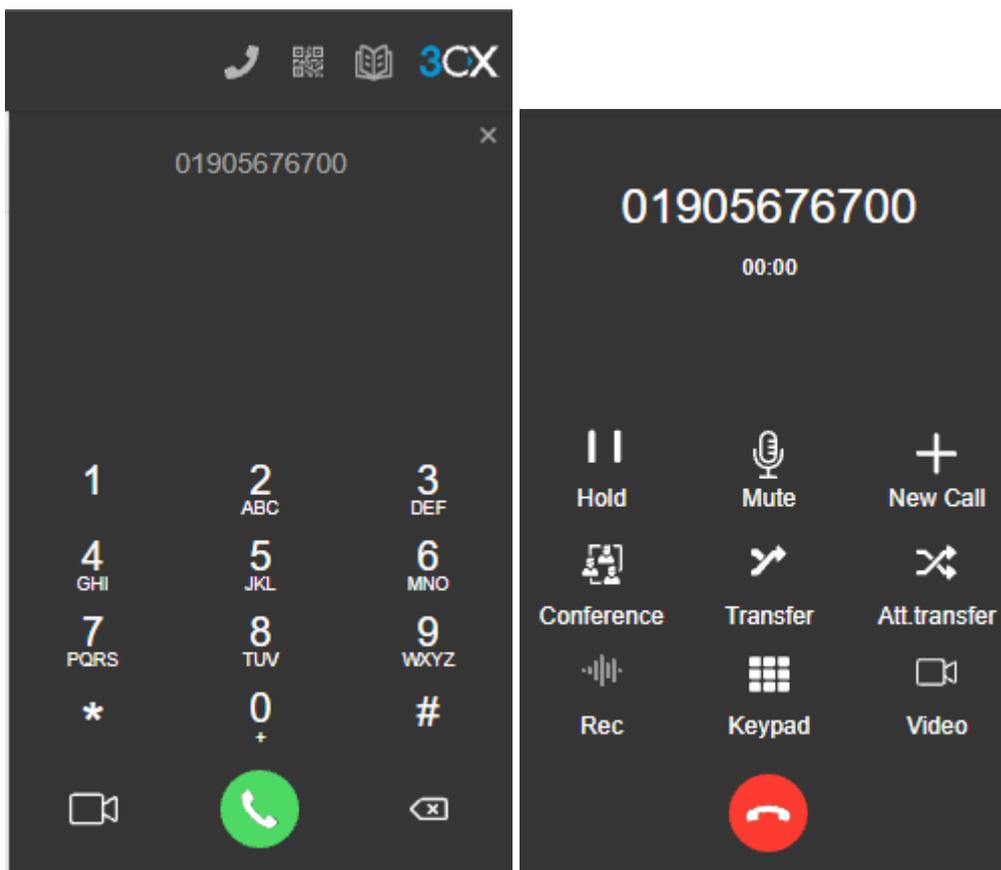


Making an External Call

To make an external call, you will need to click the phone in the top right corner. This will open your dialler.

You have the option to enter a name or number. Enter the external number you would like to call by either clicking the buttons on the screen, or using your keyboard to type the number in.

Press the phone icon on the bottom of the dialler to make the call to the number you entered.



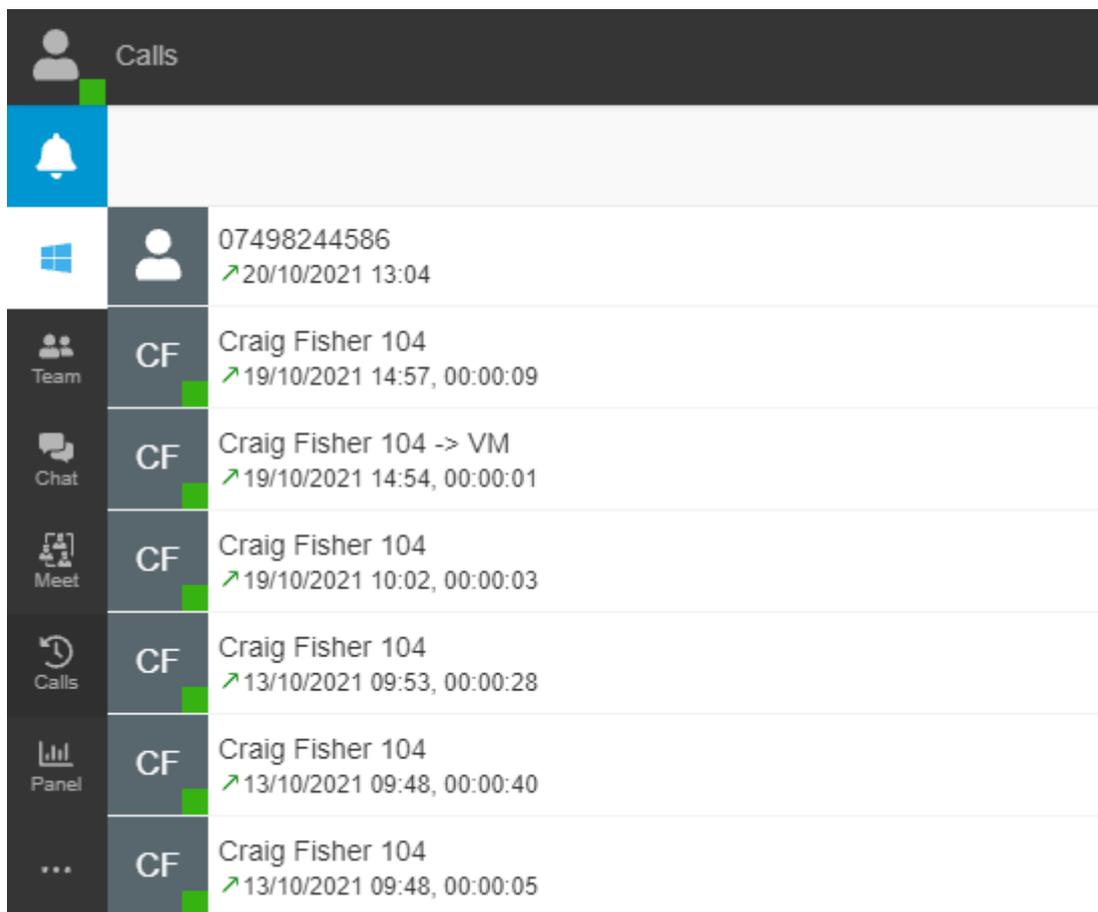
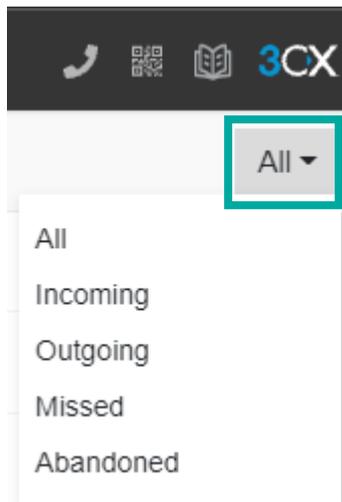
You may be asked to allow microphone and headset access to the website. Select 'Yes' to any permission prompts that appear. You will only be asked for permission once.



View Recent Calls

To view your recent calls, within the Web Client, navigate to 'Calls' on the left-hand side of the web page.

This will then list all your call history. In the top right there is a drop-down menu which allows you to select from the following options: *All*, *Incoming*, *Outgoing*, *Missed* and *Abandoned*.

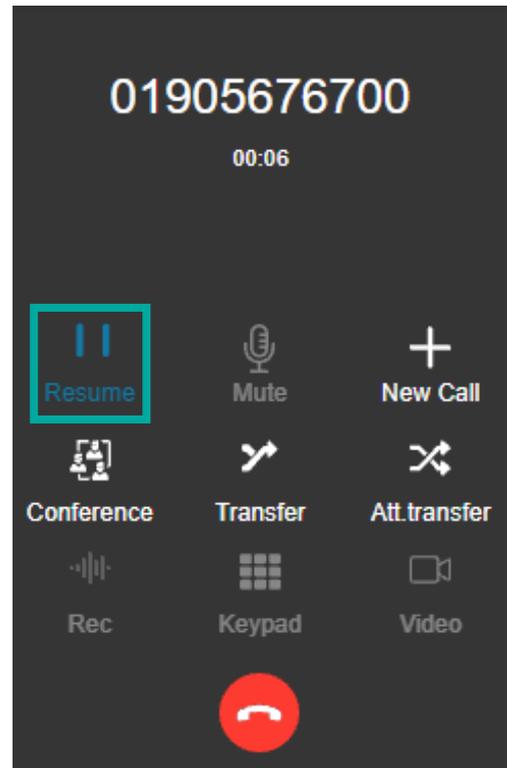
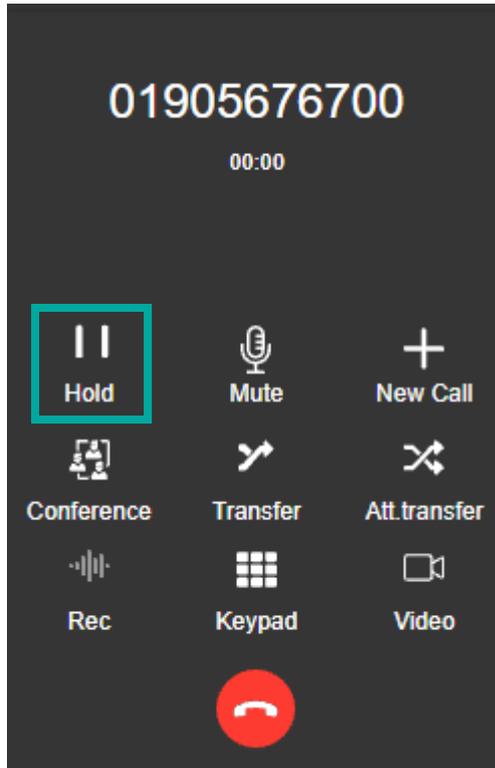




Phone Options

Putting a Call on Hold

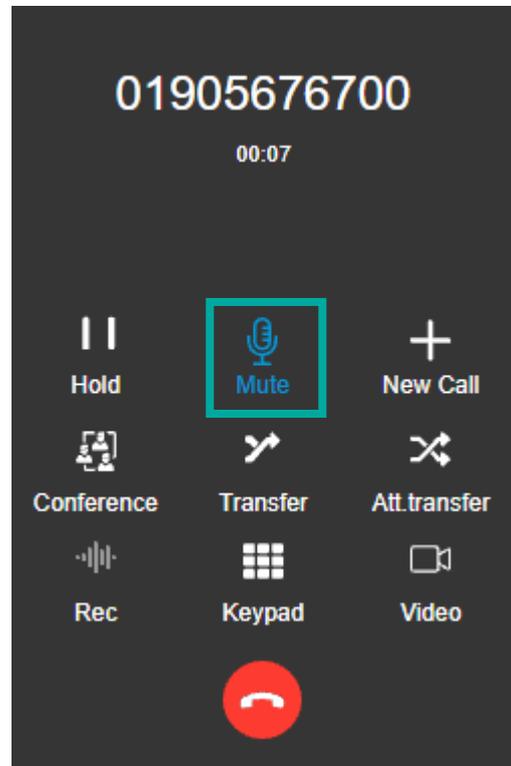
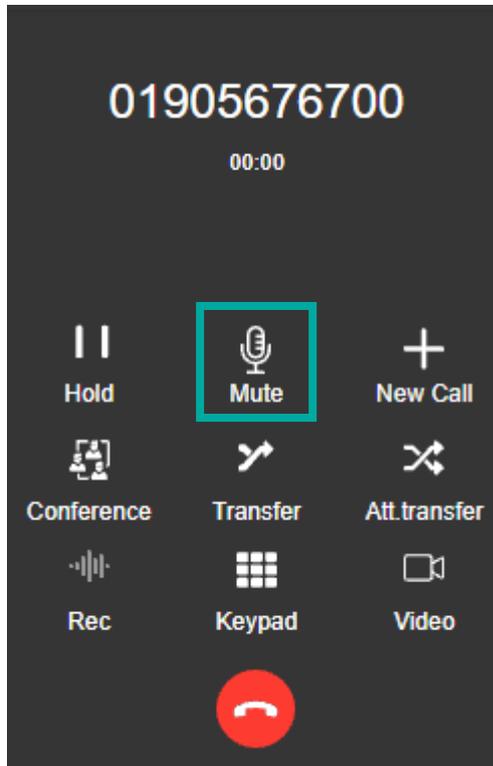
To put a call on hold, click the 'Hold' button in the top left of the dialler. To resume the call, click the 'Resume' button.





Muting Yourself During a Call

To mute yourself during a call, you can click the 'Mute' button in the middle of the top row. This will stop the other party from hearing you speak. To unmute, click the 'Mute' button again.





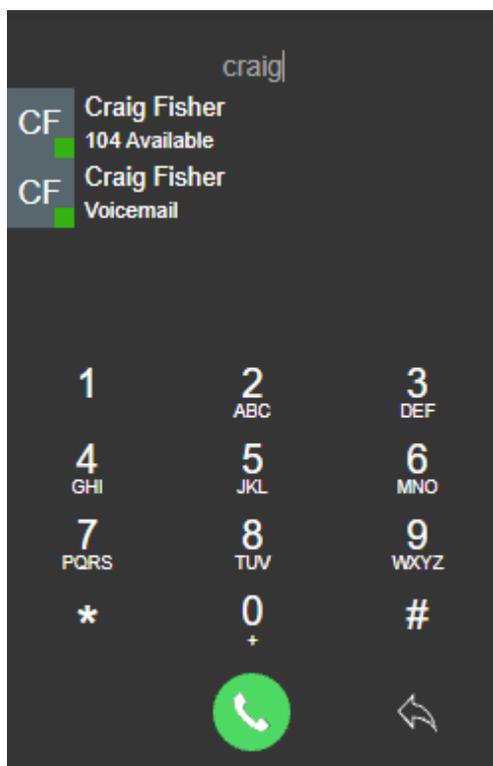
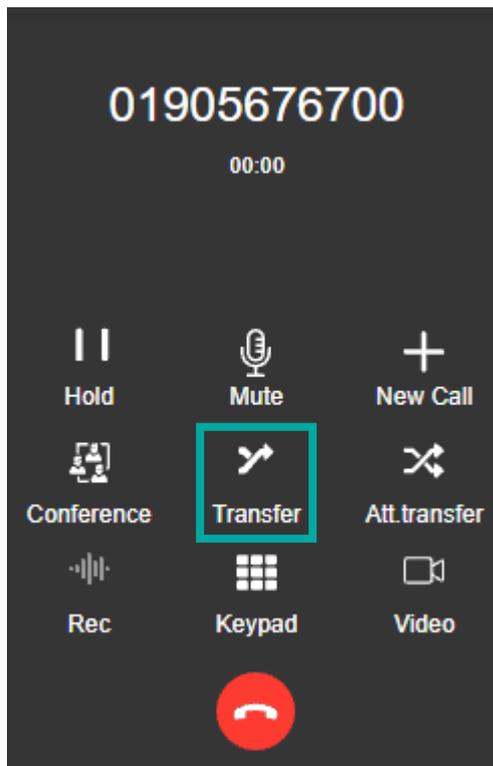
Transferring a Call

There are two ways you can transfer a call. '**Transfer**' and '**Attended Transfer**'. Nine times out of ten, you want **attended transfer**.

Blind Transfer

Transfer allows you to blind transfer a call. Doing this will send the call directly to the extension without prior consultation to the user. This is typically not used as it doesn't allow the user to confirm if they want the call beforehand.

To blind transfer, click the transfer button in the middle of the dialler.



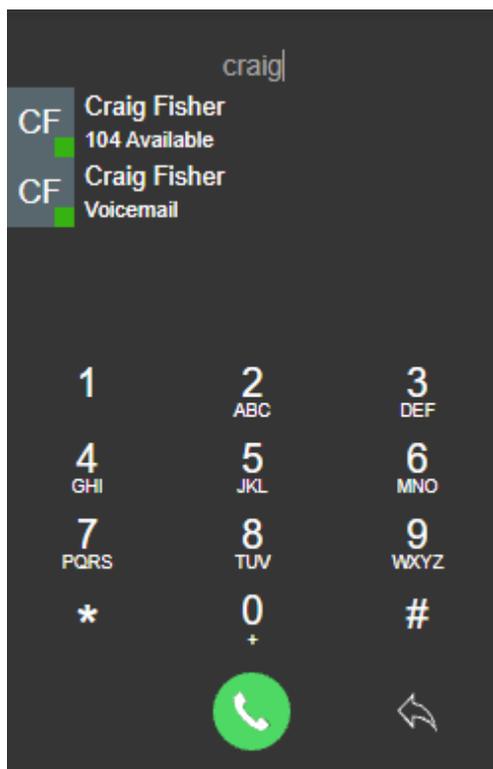
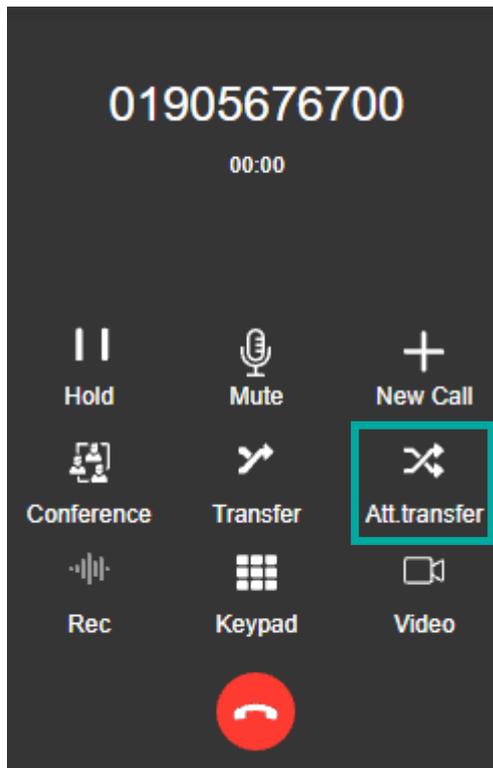
Once you've pressed transfer, you will be given the option to type a number, or search for an extension. Search for the extension you'd like to transfer to and click it. This will then push the call through to the other extension to accept.



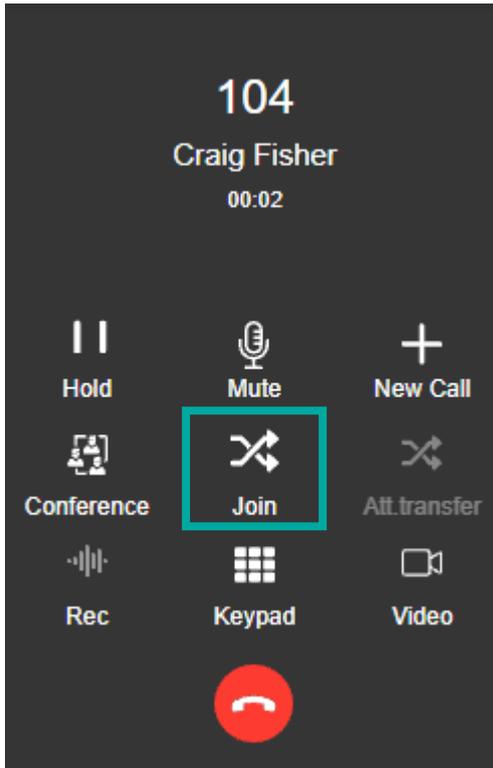
Attended Transfer

Attended transfer allows you to consult with the user before pushing through the call. This allows the user to confirm whether they want to take the call. This is the most common type of transferring.

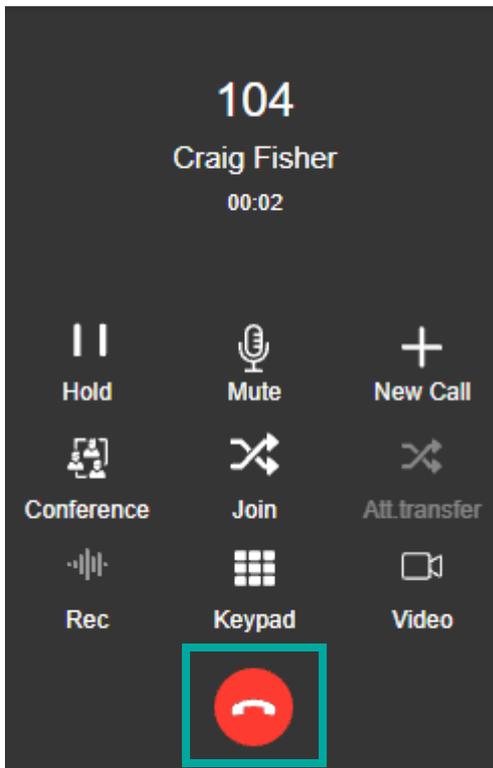
To attend transfer, click the '**Att. Transfer**' button on the right-hand side of the middle row.



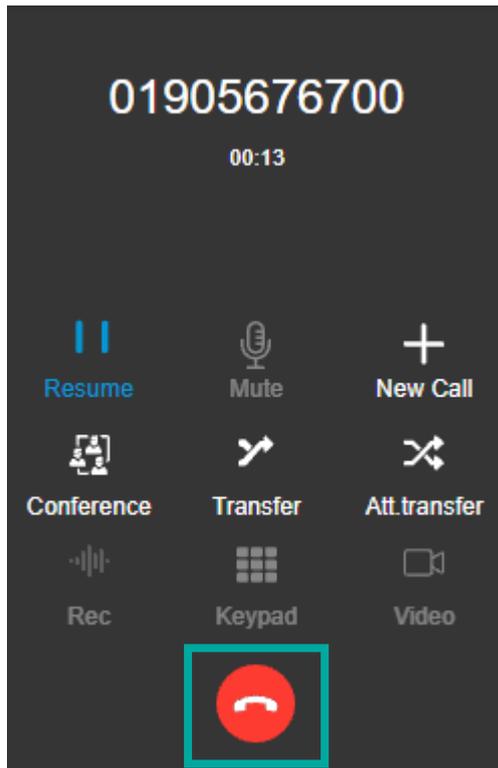
Once you've pressed attended transfer, you will be given the option to type a number, or search for an extension. Search for the extension you'd like to transfer to and click it. This will then call the extension you've selected with an internal call which allows you to talk to the user before transferring.



If the user **does** want to take the call, press the '**Join**' button in the middle of the dialler. This will join the extension to the existing call.



If the user **doesn't** want to take the call, click the **hang up button**. This will stop the call between yourself and the extension on line 2 and place you back on line 1 with the original caller.



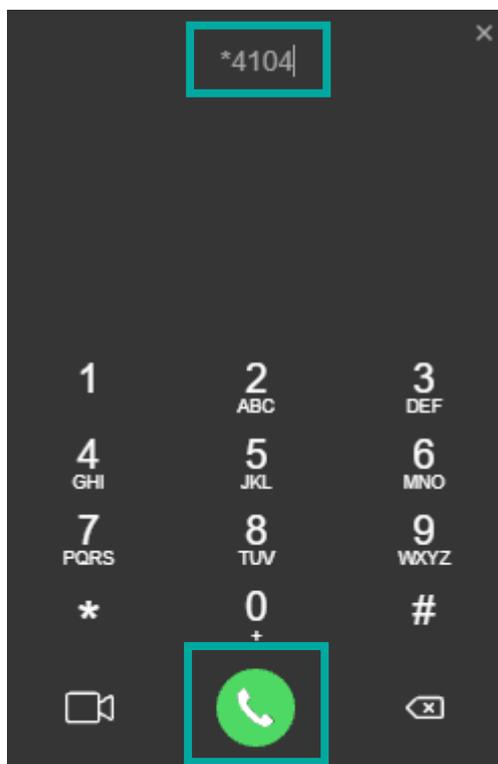
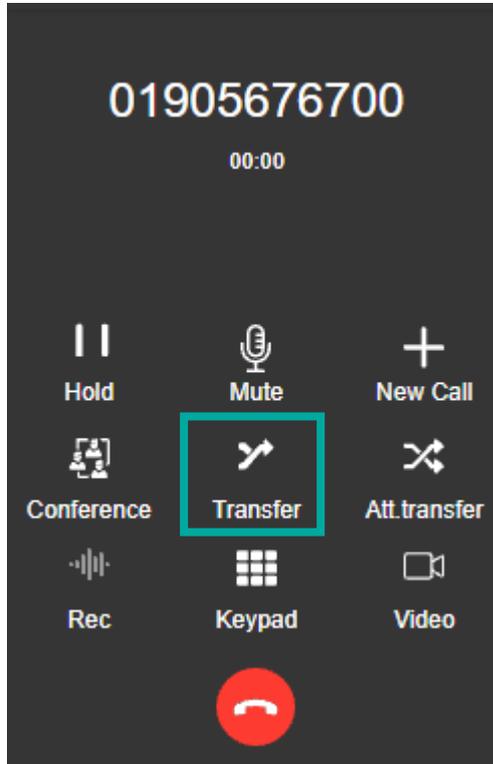
To resume the existing call, click the **'Resume'** button to retrieve the call off hold.



Transfer to Voicemail

Sometimes a caller may be placed straight to the voicemail of an extension.

To do this you need to select 'Transfer' on the dialler.



Enter *4 followed by the extension number of the user. For example, to transfer to voicemail to extension 104, you would enter *4104 followed by the call button. This will then transfer the caller to the extension's voicemail box.



Making a Video Call

Video calling within 3CX is only available internally between extensions. A webcam will be required by both participants. However, if a user is using the phone application, they will be able to accept video calls as well.

You can make a video call straight away or request a video call halfway through a call.

Initiating a Video Call

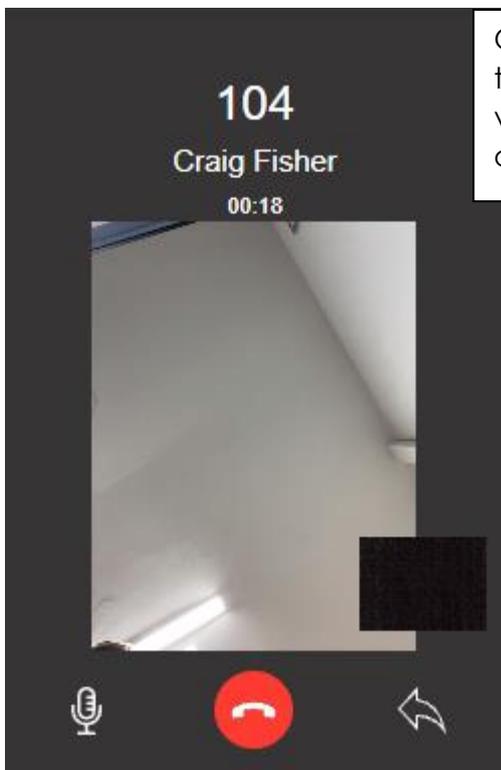
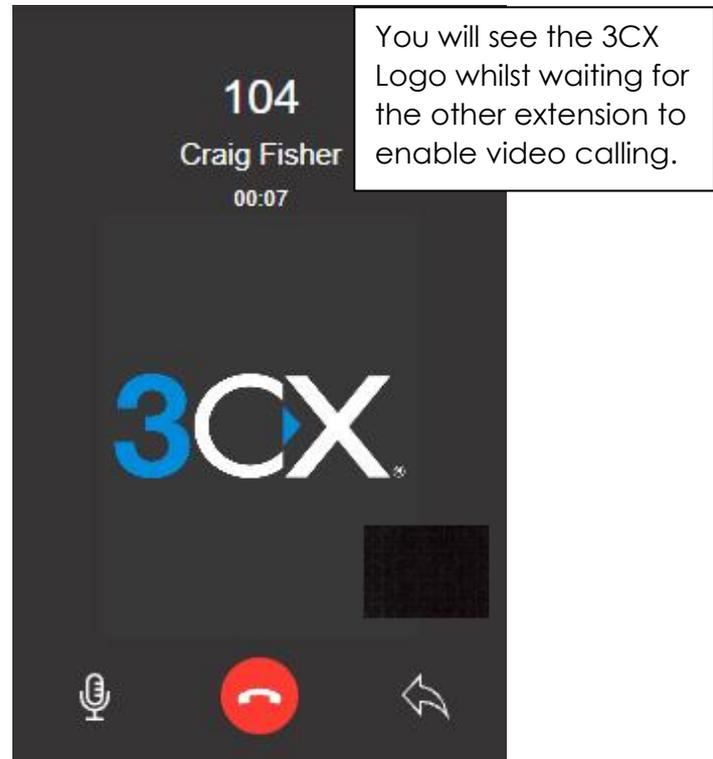
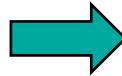
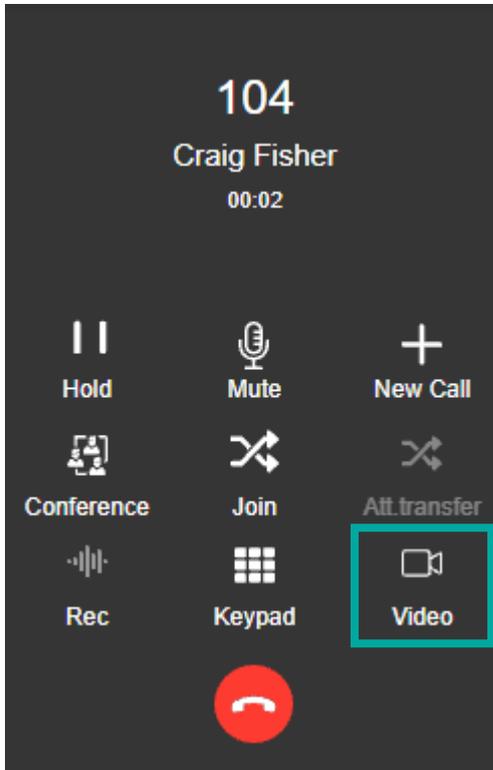
To start a video call, navigate to the 'Team' page on the left-hand side of the web client. Then, hover over the extension you would like to video call and select the video camera symbol. This will then dial the extension requesting to enable video.

The screenshot displays the 3CX web client interface. At the top, there is a 'Team' header with a search bar and a list of extensions: 'JW Jon Whittall 103 Available' and 'CF Craig Fisher 104 Available'. A left-hand navigation menu includes 'Team', 'Chat', 'Meet', 'Calls', and 'Panel'. A text box in the center of the screen reads: "Once the video call has been accepted, your dialler will fill with the extensions' video feed and yours will fill the bottom right corner." On the right side, a video call window is active, showing a video feed of '104 Craig Fisher' with a timer at '00:34'. The call controls at the bottom include a microphone icon, a red hang-up button, and a back arrow.

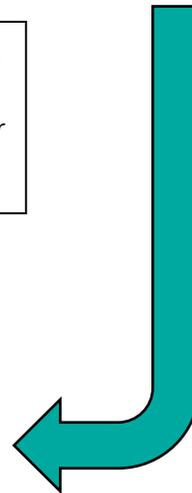


Requesting Video During a Call

Whilst already being in a call, you can request the other party enables video. To do this, click the 'Video' symbol in the bottom right-hand corner of the dialler.



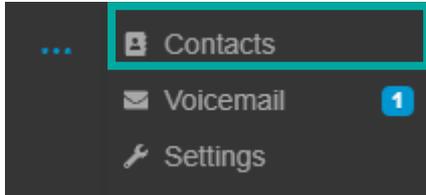
Once accepted, the other party's video will appear on the screen.





Contacts

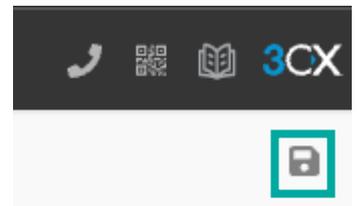
To view your contacts, click the three dots on the left-hand side of the Web Client. This will then show you the three options of 'Contacts', 'Voicemail' and 'Settings'. Select 'Contacts' to open the Contacts page.



Adding a New Contact

To add a new contact, click the '+' symbol in the top left of the Contacts page. This will open a page to enter the relevant contact details. Enter the details into the relevant fields and then click the save symbol in the top right-hand corner of the page.

First Name	Business
<input type="text" value="Spire"/>	<input type="text" value="03302050230"/>
Last Name	Business 2
<input type="text" value="Support"/>	<input type="text"/>
Company	Business Fax
<input type="text" value="Spire Tech Group"/>	<input type="text"/>
Email	Home Fax
<input type="text" value="support@spiretechgroup.cc"/>	<input type="text"/>
Mobile	Other
<input type="text"/>	<input type="text"/>
Mobile 2	
<input type="text"/>	
Home	
<input type="text"/>	
Home 2	
<input type="text"/>	

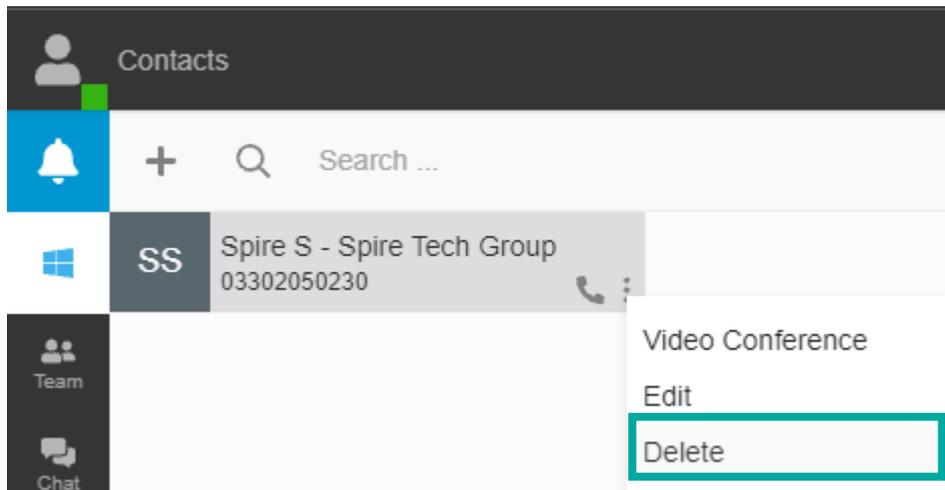
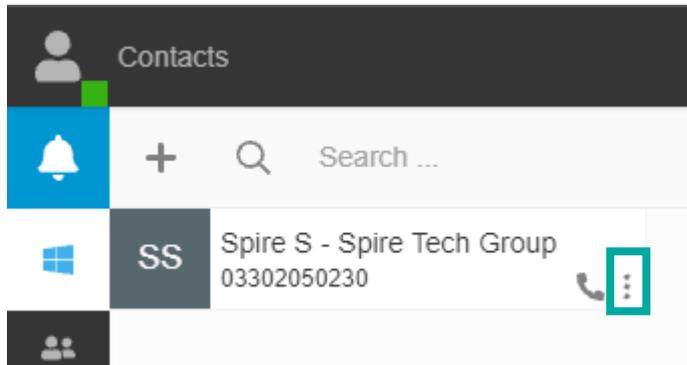




Deleting a Contact

To delete a contact, on the contacts page, click the three dots under the relevant contact.

From the drop-down menu that appears, click 'Delete'. This will then delete the person from your contacts.





Changing your Status

Within 3CX, you can change your status to show yourself as available, away, do not disturb or lunch. Additionally, there may be custom categories set up for users.

To change your status, within the Web Client, click your icon in the top left. This will bring a drop-down menu.



Click which status you would like to change to.



Setting a Custom Status

To set a custom status, click the pencil icon to the right of the relevant status. This will open a text box. Enter the status you would like to display and then click 'OK'.

Set Status Message ×

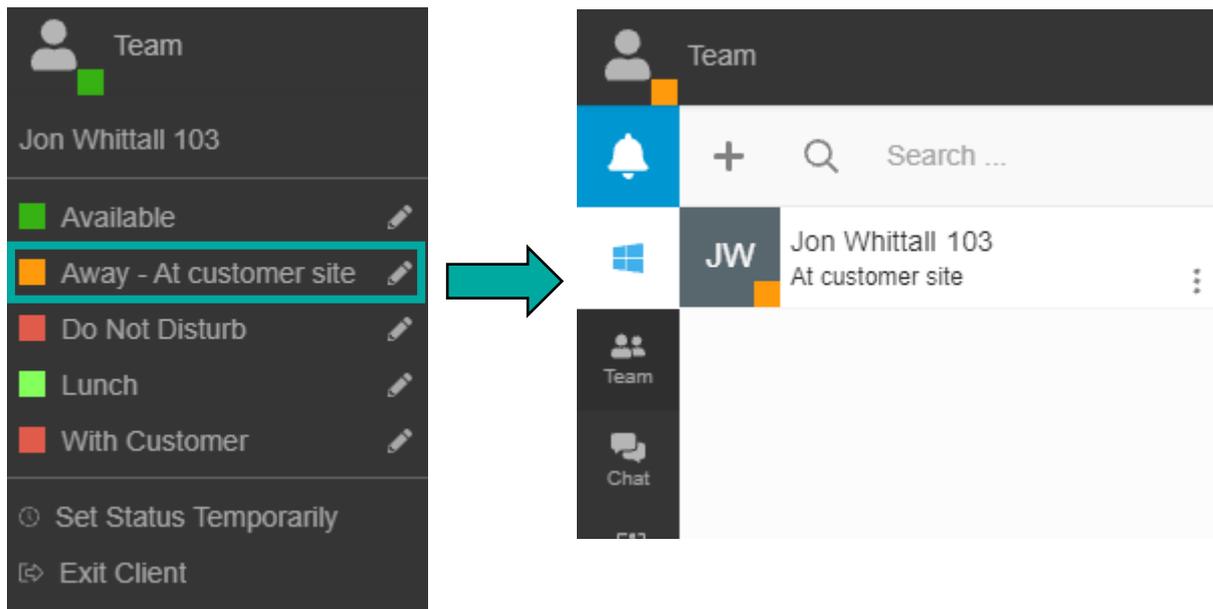
Custom status message

At customer site

OK

Cancel

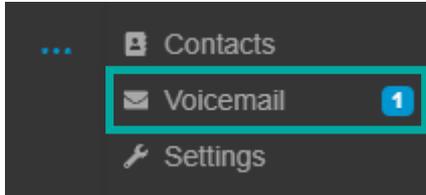
After clicking 'OK', navigate back to the top left and select your custom status. This will then display your status to all other extensions.





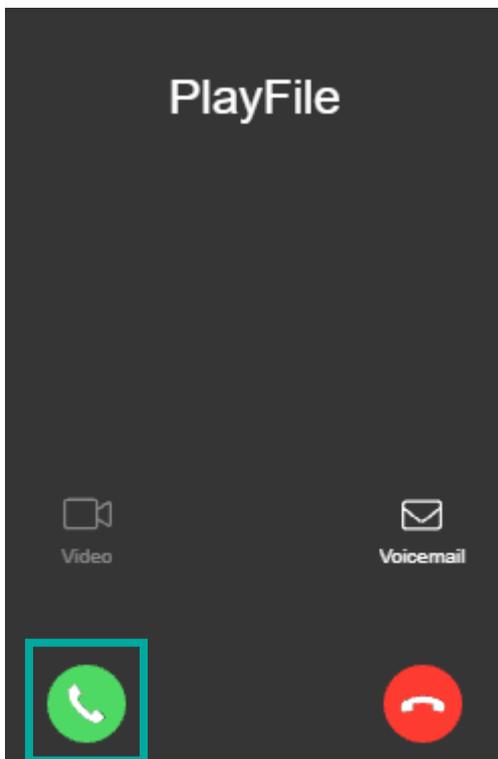
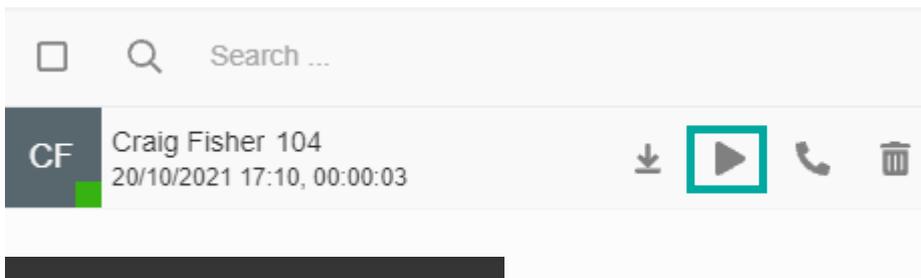
Voicemail

To view your Voicemail, click the three dots on the left-hand side of the Web Client. This will then show you the three options of 'Contacts', 'Voicemail' and 'Settings'. Select 'Voicemail' to open the Voicemail page.



Play Voicemail

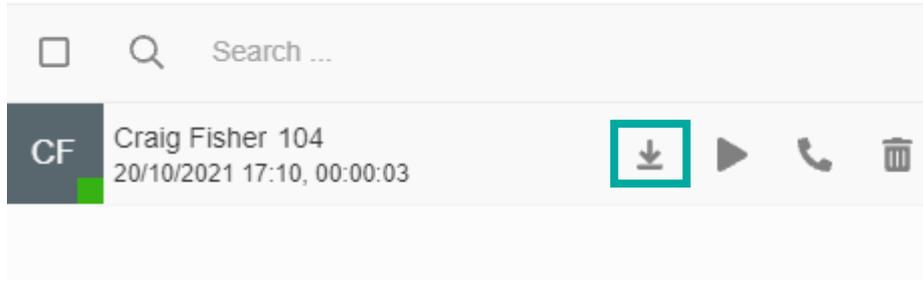
On the Voicemail page, hover over the voicemail you wish to play. On the right-hand side a play icon will appear. Click the icon and it will open a call named 'Play File'. Click the answer icon to play the voicemail.



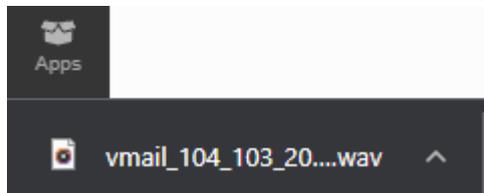


Save Voicemail

Saving a voicemail can be done by clicking the save icon by hovering over the voicemail you wish to save.

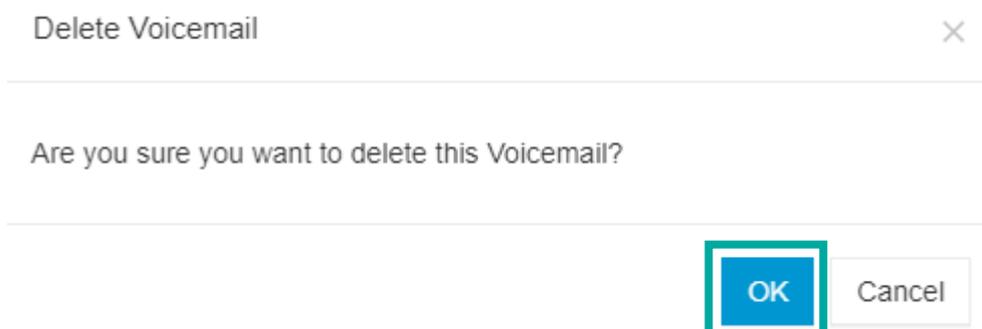
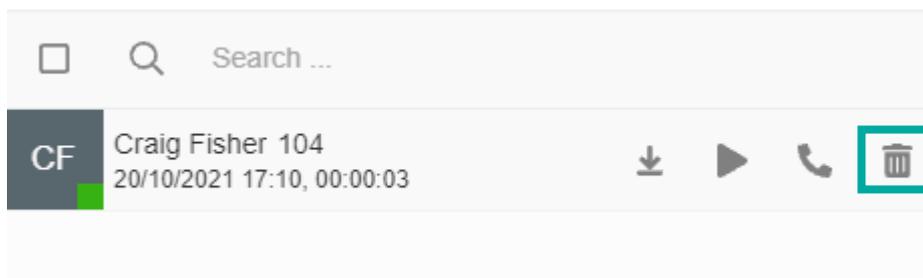


This then downloads it straight to your downloads folder and appears at the bottom of your web browser.



Delete Voicemail

Deleting a voicemail is done by clicking the trash icon next to the phone symbol. This then brings a prompt up asking to confirm the deletion. Press 'OK' to delete the voicemail.





Chats

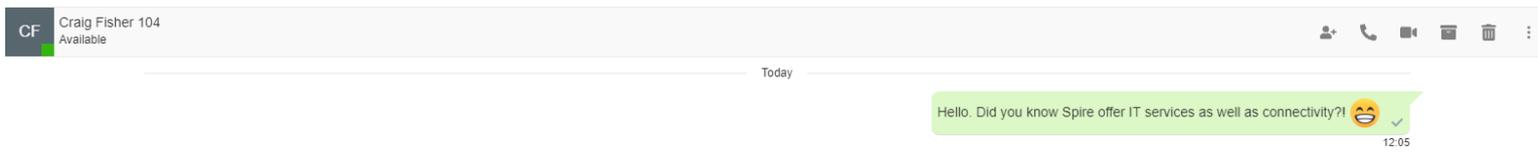
Creating a New Chat

Creating a new chat is easily done through the team page.

Navigate to the 'Team' tab within the Web Client. Then, hover over the user you would like to start a chat with. A chat symbol will then appear in the bottom right of their card. Click this chat icon.



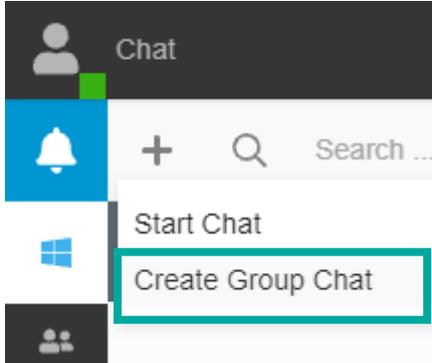
Upon clicking the chat icon, a chat window will appear. Click the box at the bottom of the page to start typing your message. Once the message has been written, press enter.





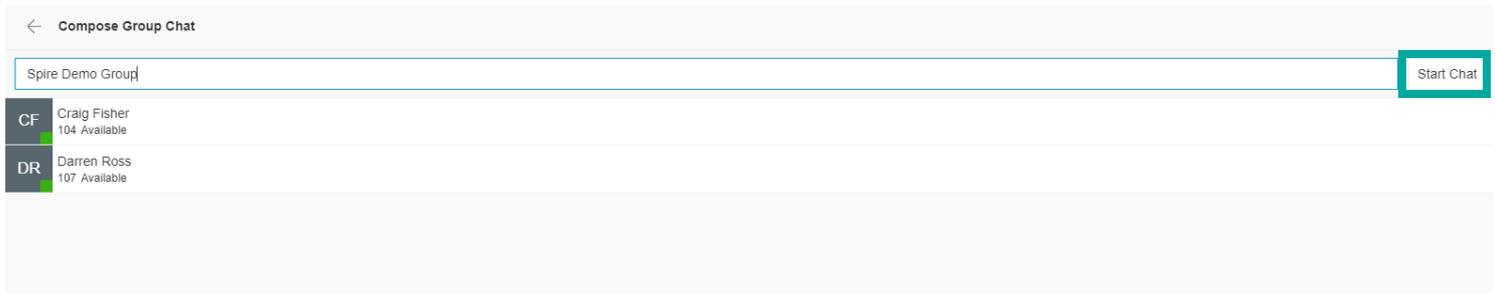
Creating a Group Chat

To create a new group chat, go to the 'Chat' page on the left-hand side of the Web Client. Then, click the + symbol in the top left and select 'Create Group Chat'.



This will then open a window allowing you to select the users you would like within the group chat. Select the users, then click 'Next'.

After pressing 'Next', you will be asked to create the group chat name. Type the group chat name into the box and then click 'Start Chat'.



Once the chat has been created, type your message in the box at the bottom and press send for the users to receive their message.



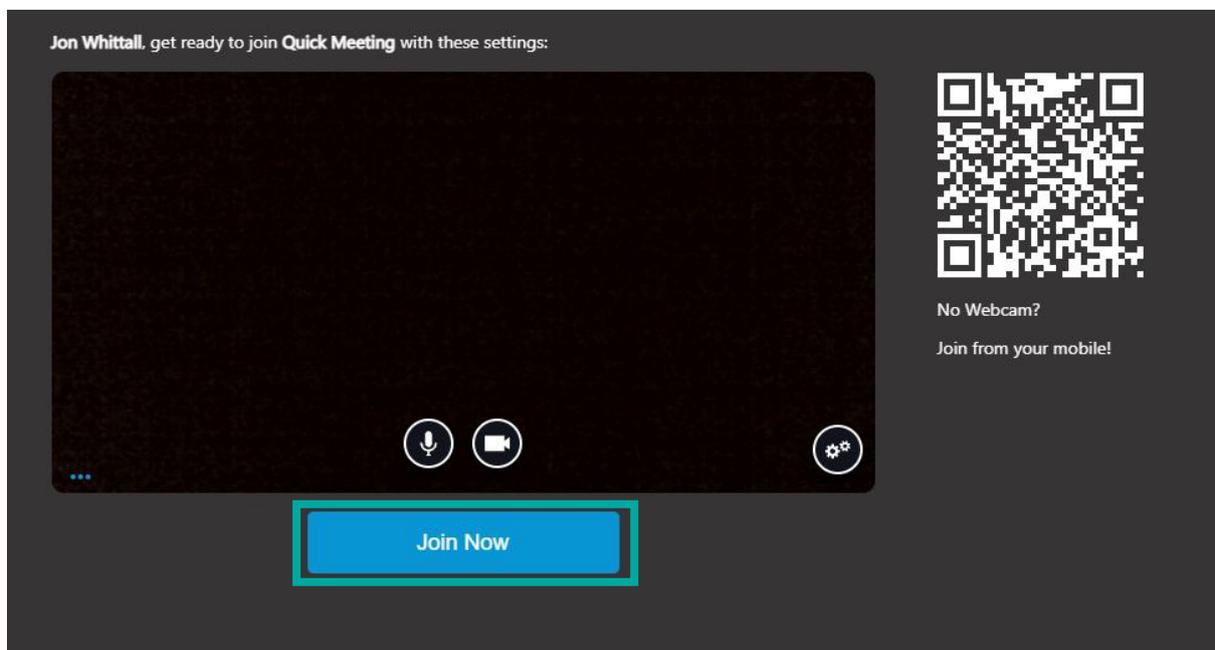
Meetings

Video conferencing is available with 3CX. This allows you to create meeting rooms where users can join, including users outside your business who don't have 3CX through their web browser.

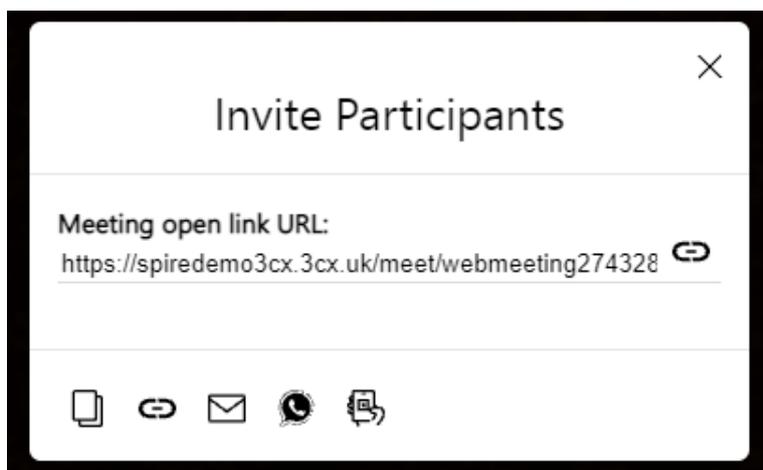
Creating a Quick Meeting

Creating a quick meeting is quite literally, very quick. Navigate to the 'Meet' page of the Web Client by clicking 'Meet' on the left-hand side of the Web Client.

As soon as you have clicked the 'Meet' button, you will be asked to get ready to join a quick meeting by checking your communication settings such as your web cam and your microphone. Press 'Join Now' once you're happy with these settings.



Upon entering the meeting, you will receive a pop-up window that provides you with a meeting URL. Copy this meeting URL and send it to your participants through e-mail, chat etc.



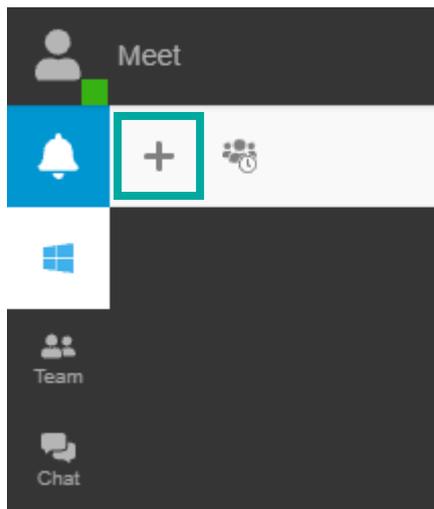


Creating a Scheduled Meeting

3CX also offers the ability to create a scheduled meeting for a later date. As well as quick meetings, scheduled meetings also offer the ability for non-3CX users to join the meeting through a web browser.

Within the Web Client, navigate to the 'Meet' page which is accessible through the 'Meet' button on the left-hand side of the client.

In the top left corner of the page there is a + symbol. Click the + symbol which shows the 'New conference' page.



After clicking the + symbol, you have a selection of options.

- Audio – this is a meeting which is audio only.
- Video – this is a meeting which has both video and audio capabilities.
- Webinar – this meeting allows for users to present their screen, individual windows and for participants of the meeting to show their video alongside this. Webinars are the most common type of scheduled meeting as they offer all the capabilities within the 3CX system.

Select the 'Later' option to schedule the meeting for a later date. This will produce input fields to select the date and time for a meeting.



Enter the subject of the meeting and the notes to participants so they know what the meeting is about.

At the bottom of the meeting page is where participants are entered to join a scheduled meeting. For internal users (users that are already on the 3CX system) type their name into the box and select them from the drop down.

Select Email / Calendar to add to

Email (Legacy, No RSVP)

i This option will have 3CX mail the invites on your behalf. However RSVP is not supported.

Add Participants or [Import](#)

x +

CF Craig Fisher
craig.fisher@spiretechgroup.com

Create Meeting Cancel

For external users, type the participants email address in full and then click the + symbol to the right of the box.

Select Email / Calendar to add to

Email (Legacy, No RSVP)

i This option will have 3CX mail the invites on your behalf. However RSVP is not supported.

Add Participants or [Import](#)

x **+**

Participants

Craig Fisher (craig.fisher@spiretechgrou... x

Create Meeting Cancel

Once happy with the participants, click 'Create Meeting'.



After the 'Create Meeting' button has been clicked, a page will show the meeting that has been created, including the details.

+ Search ...

Demo Meeting
20/10/2021 15:00

Demo Meeting

Start Date: 20 October 2021
Start Time: 15:00
Conference ID: 8558727

Notes: You can also provide notes to participants so they know what the meeting is about beforehand.
To join dial 700 (internal) and enter the conference ID.

Click on this URL to join the meeting

<https://spiredemo3cx.3cx.uk/meet/!8uA80eEfrDHA30HPIWghKQF>

Participants

Add participants

Enter name or email +

Craig Fisher (craig.fisher@spiretechgroup.com)

You can then check your scheduled meetings at any time by clicking the 'Meet' button on the left-hand side of the client and clicking the 'Scheduled Conferences' button next to the + symbol for creating a new meeting.

Meet

+

Team

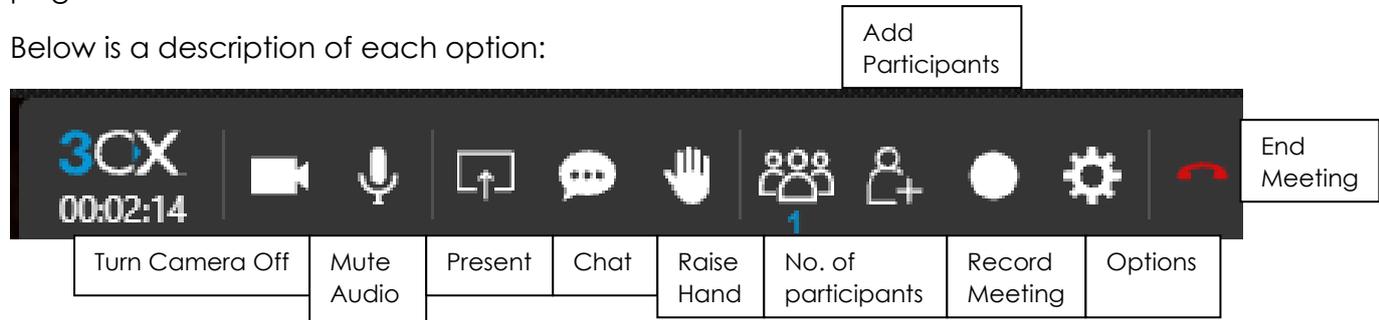
Chat



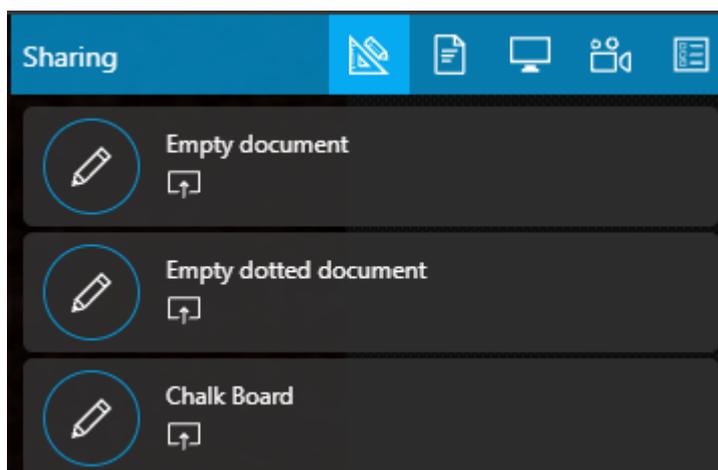
In-Meeting Options

During a meeting, there are multiple options within the toolbar at the top of the page.

Below is a description of each option:



- **Turn Camera Off** – This turns off your camera
- **Mute Audio** – This mutes your microphone
- **Present** – There are numerous options within Present.
 - o Whiteboard
 - The whiteboard allows you to draw and present your drawing to the participants of the meeting.
 - Within the whiteboard you are presented with 3 options:
 - Empty Document (Plain white background)
 - Empty dotted document (Dot Matrix background)
 - Chalk Board (Chalkboard background).

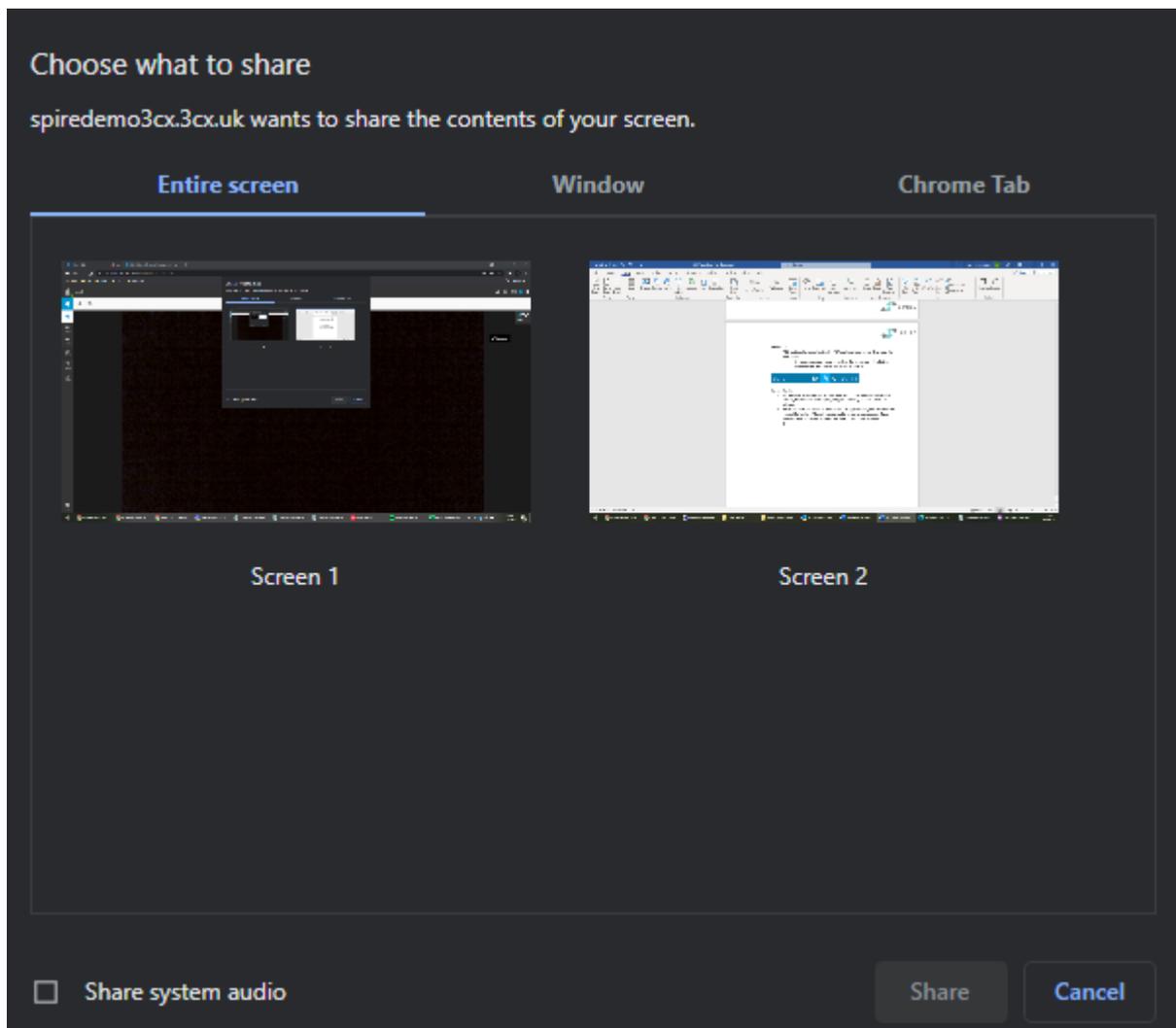




- Share PDF
 - This option allows you to attach a PDF so all participants can download the document.
 - Documents are uploaded by clicking the '+' symbol in the bottom right of the screen whilst 'Share PDF' is selected.

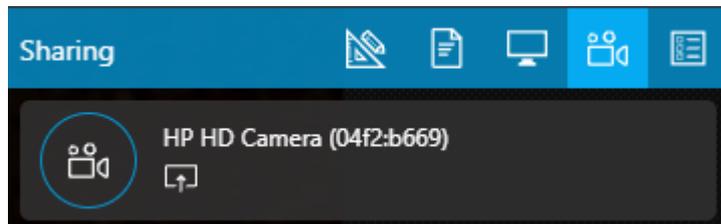


- Screen Sharing
 - By selecting screen sharing, it gives you the option to present your entire screen, the specific window (program) you are using or even a singular chrome tab.
 - Once you click this option, a pop-up box will appear asking which screen you would like to share. There is also the ability to share system audio if you wish (located in the bottom left-hand side of the pop-up window).





- Start Camera Sharing
 - Here you can select which camera (if your machine has multiple) to share with.



- Start a New Poll
 - This option allows you to create a poll which your participants will be able to use and vote on.
 - To create a new poll, like sharing a PDF, click the '+' symbol in the bottom right hand of the meeting window once this option is selected.



- **Chat** – This allows you to view that chat of the meeting.
- **Raise Hand** – This lets the meeting presenter view who has raised their hand for a question.
- **View Participants** – This allows you to view the participants of the meeting.
- **Add Participants** – This allows you to add participants to the meeting
- **Start Recording** – This will allow you to record the meeting so any people that missed the meeting can catch up and rewatch it.