CUSTOMER VOIP GUIDE

TABLE OF CONTENTS

CALLING

Dial the extension
- Lift the handset
- Or press CALL for speakerphone

To answer a call
- Lift the handset
- Or press ANSWER for speakerphone

SOFT BUTTONS

4 buttons that change status

- History, Directory, DND & Menu
- When Ringing: Answer, Forward, Silence, & Reject
- When In A Call: Transfer, Hold, Conference, & End Call

PROGRAMMED BUTTONS

- Buttons on the left & right of the screen
- Buttons normally represent Shared Parking or Speed Dials
- There can be up to 3 pages of buttons to scroll through.

Pages

VOLUME BUTTON

- Press to adjust ring volume
- Lift handset and press to adjust call volume

QUICK TRANSFER

- Also known as a "Blind Transfer"
- While on a call, press "Transfer" then the line of the person you would like send the call to and then press "Transfer" again.
- This process will transfer the call without speaking to the person you are transferring the call to.

ATTENDED TRANSFER

- While on a call, press TRANSFER

- Press staff member button (or type their extension number)

- Wait for the staff number to pickup

- Prep them for a call

- Hit TRANSFER to connect the call and hang up

CONFERENCE

- While on a call, press CONFERENCE
- Dial extension
- Press SEND (answers second line)
- Press CONFERENCE (joins all 3 lines)

ANSWER COWORKER'S PHONE

- If your coworker's phone is ringing, the light on their phone will FLASH red
- Press their red extension button to pick up the call

DIRECTORY (for larger companies)

- Click '3CX PbooK' button
- Click SEARCH
- Use the number pad to type in the person's name
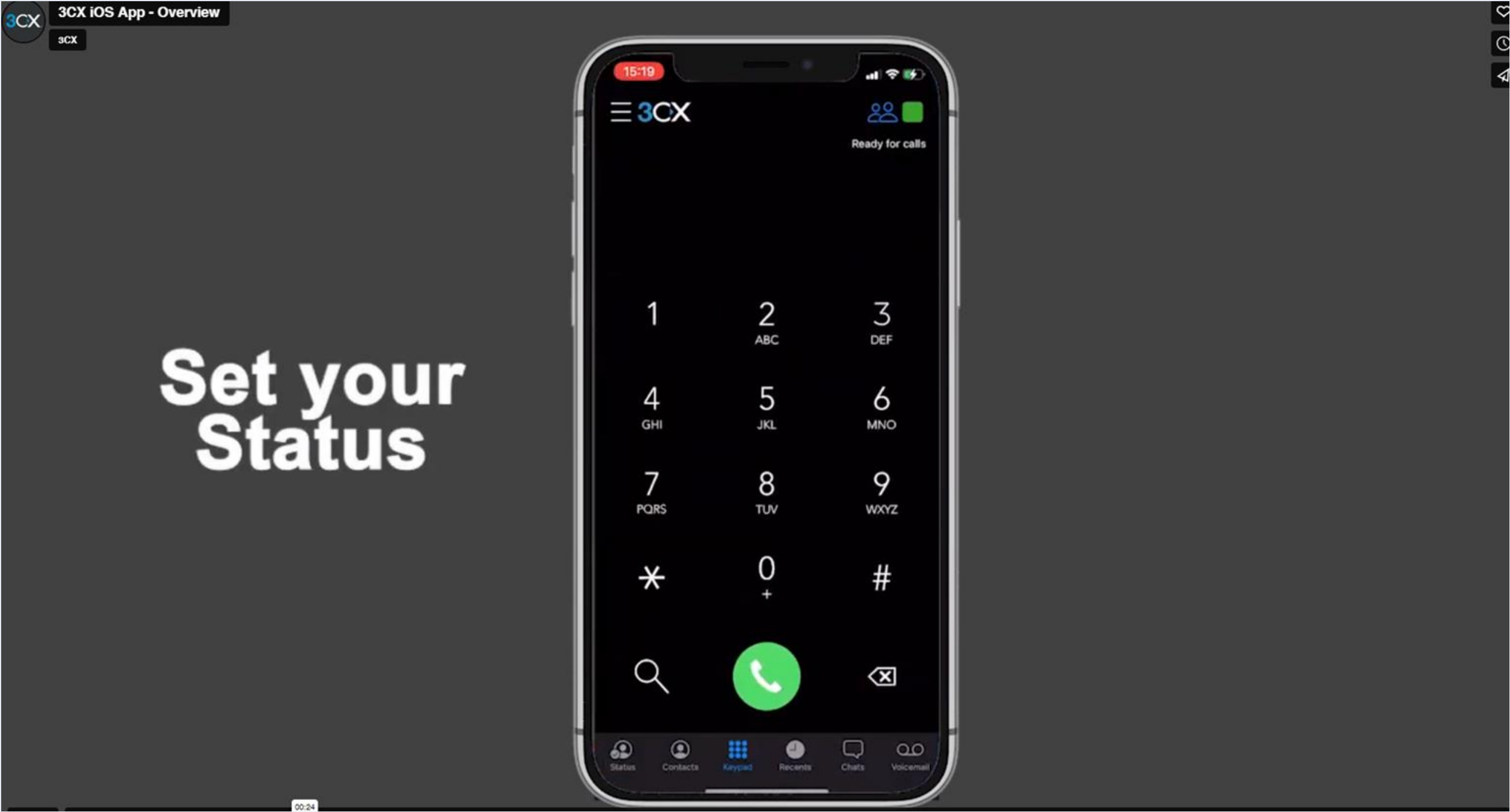- Select that person and CALL

VOICEMAIL SETUP

- Hit the message button & enter PIN#
- Press * to play messages
- Press 9 for options
  - 1 profile status
  - 4 to delete all read messages
  - 5 to change self identification
  - 6 mailbox information
  - 7 to change pin number
  - 8 greeting message

We must have your email for Mobile App and Voicemail.
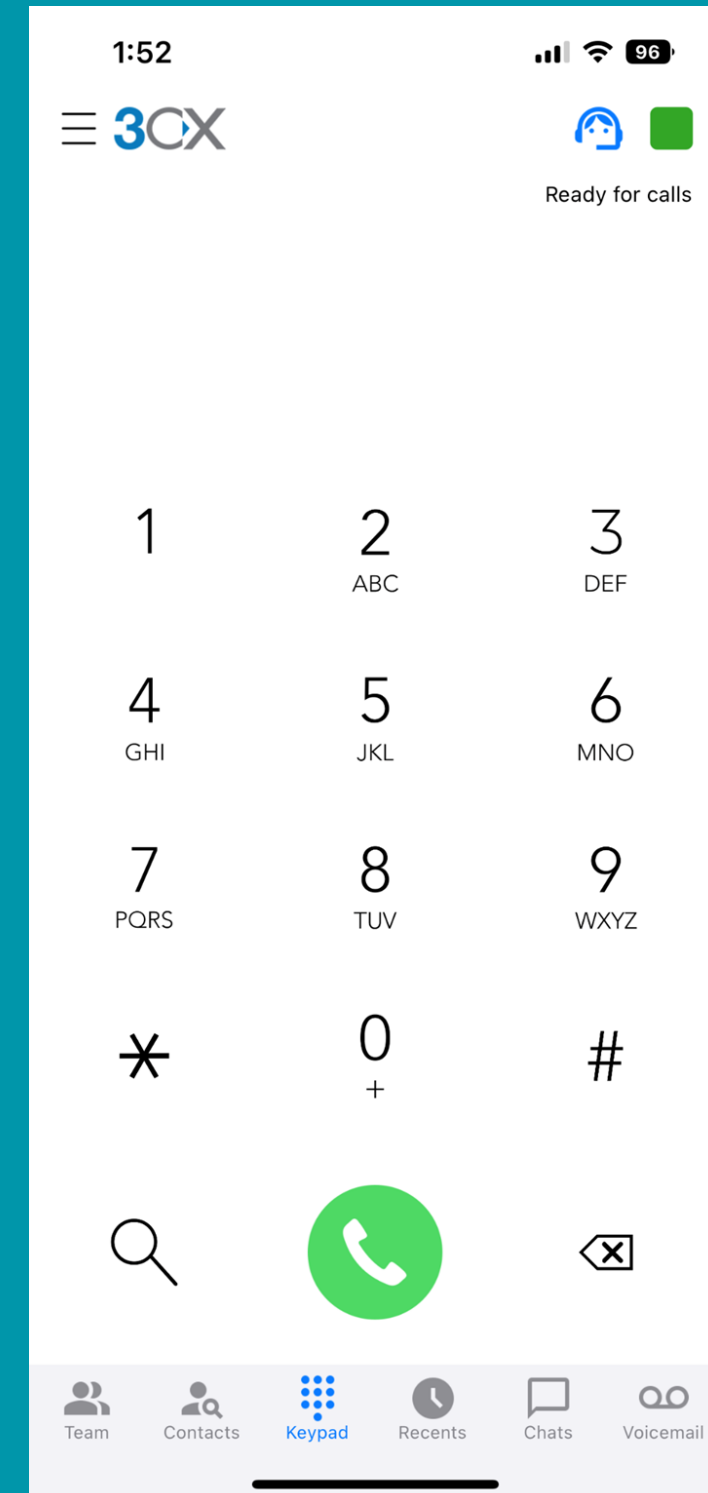
MOBILE APP

MOBILE APP

- Download from app store

- Scan the QR code from your Welcome Email

- Now you can make calls as if you were sitting at your desk!

- Work from home or on the road

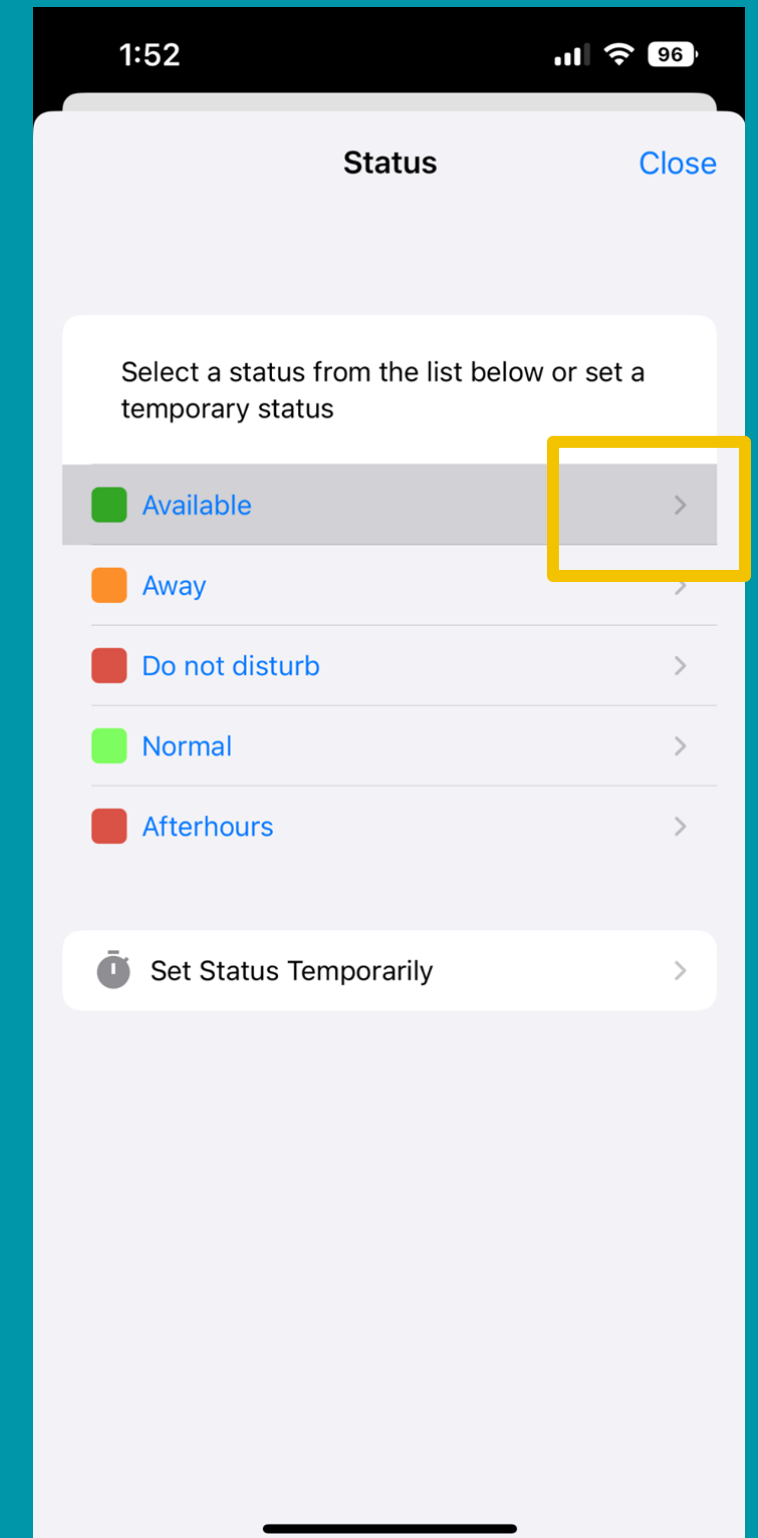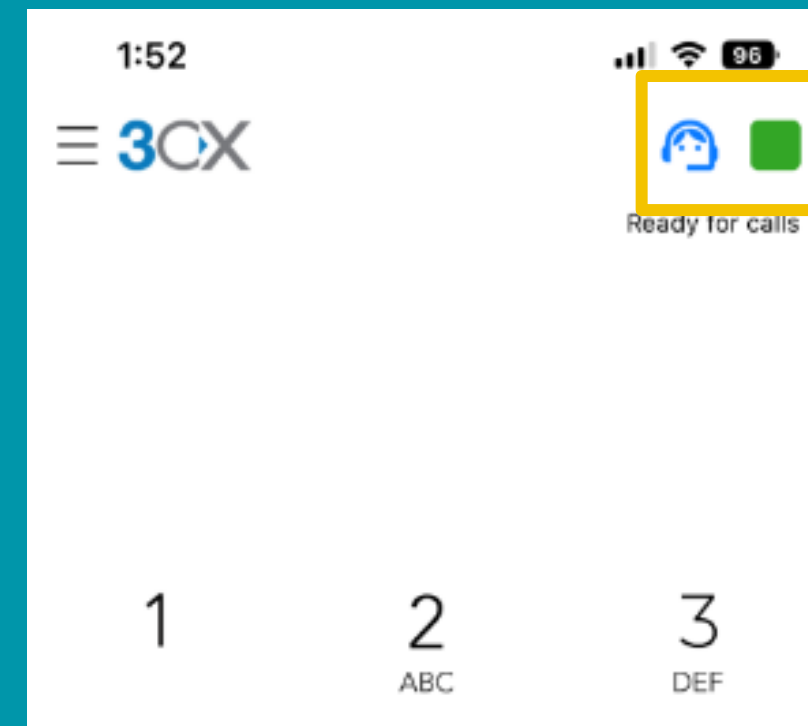*We must have your email for Mobile App and Voicemail.*

MOBILE APP

- Place and receive calls when away from the office
- Import contacts from office/school
- Check voicemail
- Chat

HOW TO TURN OFF MOBILE APP

- Click the GREEN BOX
- Click the ARROW next to AVAILABLE
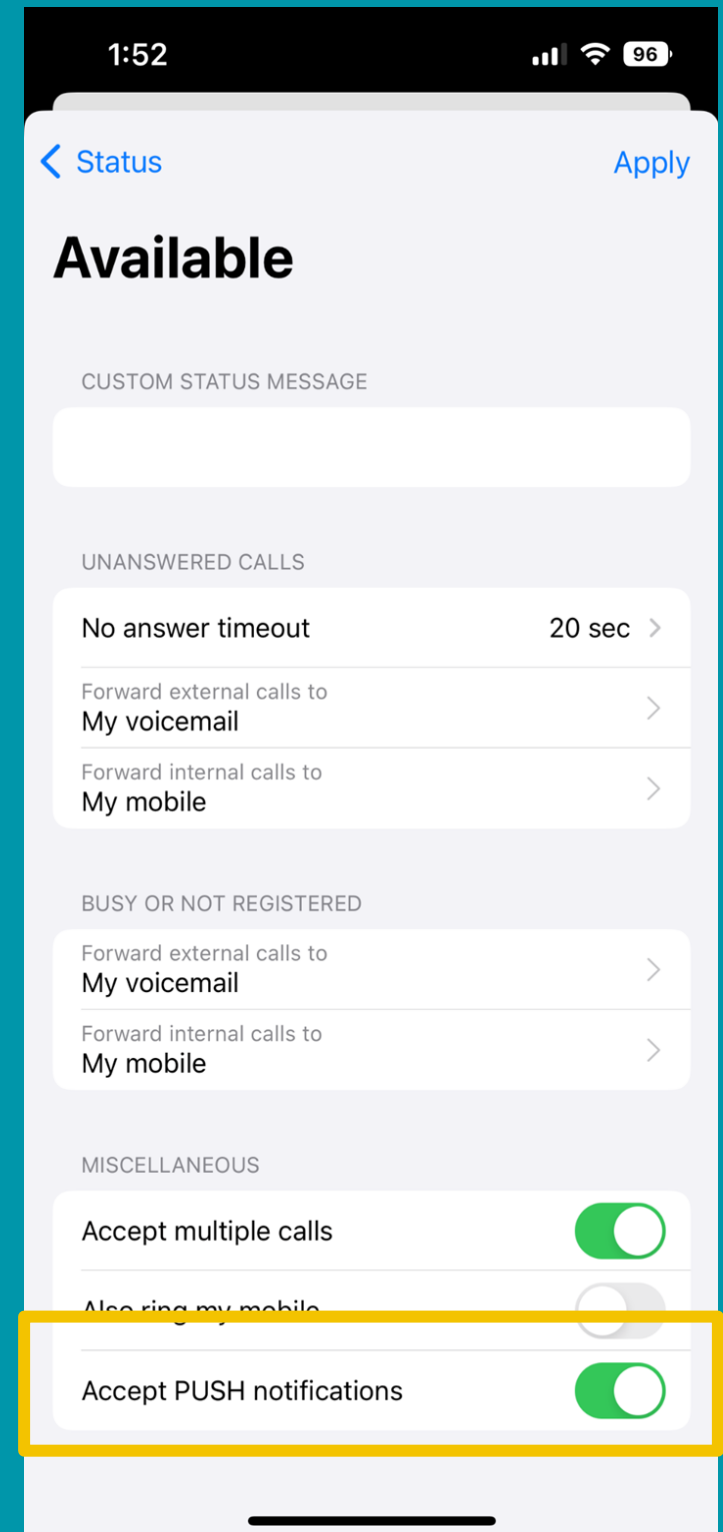
*continue to next slide

HOW TO TURN OFF MOBILE APP

• Turn off ACCEPT PUSH NOTIFICATIONS

WELCOME EMAIL EXAMPLE

Hi Joe,

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

Your Extension

- Your extension number is **9913**
- Your extension's PIN is **1022**
- Check your voicemail by dialing **9999** and entering your PIN

Your Web Client Login

- https://santarosacomm.tx.3cx.us:5001/webclient
- Login using **9913** and password **tvqbXkVo3Y**

Work from Anywhere with the 3CX Apps

- iOS or Android - scan the QR code at the top of this email after installing the app.
- 3CX App for Windows - configure it by running the attached config file
- New 3CX Windows/Mac Desktop App - login to the web client, and click on the Windows/Mac icon to install and provision the app

Host Meetings in your Personal Virtual Meeting Space

- Invite external parties to ad hoc Video Conference with your Click2Meet link:
- https://santarosacomm.tx.3cx.us:5001/meet/webmeeting743045

EXTRA RESOURCES

HOLD VS. PARK

HOLD

- Hold can only be picked up by the person who placed the call on hold.

PARK

- Park can be picked up by anyone in the organization.
- To place a call on park, simply press the "SP" button.

PAGE

- Dial code provided by Syntrio Tech to page all phones.
- Page is announcement. Other users cannot speak back.
- Paging must be setup by Syntrio

VOICEMAIL / INTERCOM

- Directly to Voicemail
  - Dial *4 and then the extension to transfer directly to voicemail.
  - Example:
    - TRANSFER - *4 - EXTENSION

- Intercom
  - Dial *9 and then the extension.
- *available upon request.

FLASHING RED LIGHT

Flashing red light could mean two things.

1. Voicemail

- Hit the MESSAGE button to check voicemail.

2. Missed Calls

- If you missed a call the red light will flash.
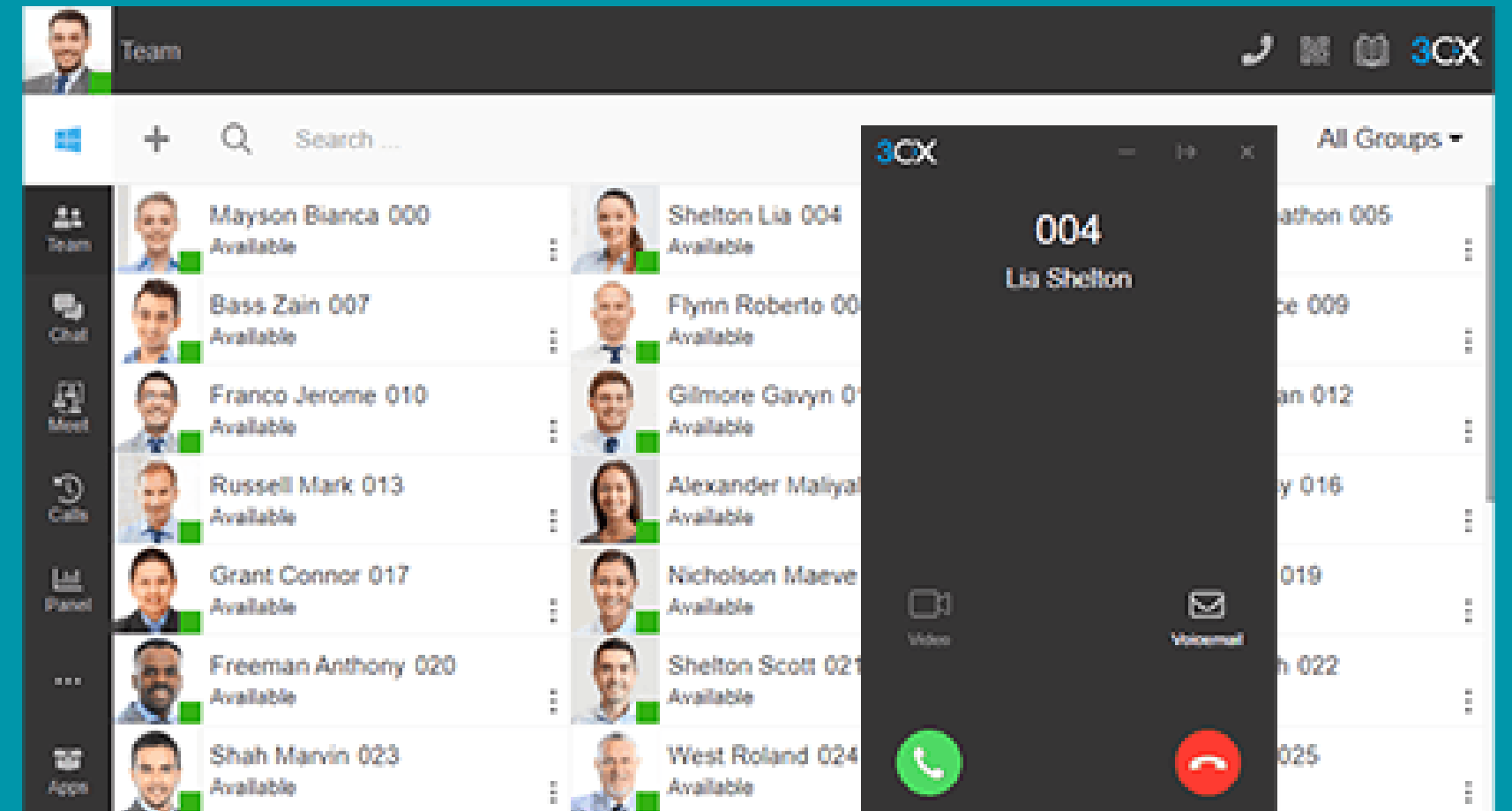- Simply press the HISTORY button to view missed calls.

WEBCLIENT & WINDOWS CLIENT

- For additional features and information, check out the web client.

CHECK OUT THE VIDEO

CHECK OUT THE WEBSITE

Yealink T43U

HD Handset

Line or Speed Dial Keys

Speakerphone

LCD Screen

Soft Keys

Dialing Pad

Navigation Center

Volume Rocker

Call Feature Keys

Call Feature Keys
Mute
Headset
Messages
Redial
Speakerphone

Yealink T46U

Yealink CP935

Yealink W77R - Wireless

Yealink W77P – Cordless

Yealink T57

Yealink WH63

PHONE GUIDE

Actions
- Ringer Volume (L&R Arrows)
- Up Arrow (Access Intercom)
- Down Arrow (Access Directory)

To place a call, dial number and press Green Button

Hold
- Top Right Key (Line Status)
- Arrow Down
- OK
  - Top Left to Resume

Call History

Line Status

Mute

PHONE GUIDE

Transfer
- Press Transfer
- Enter Extension
- Top Right to complete transfer

Voicemail
- Message Key
- Arrow Down
- OK
  - Follow instructions

Add Contacts
- Down Arrow
- Options
- New Contact
- OK
  - Enter contact information
  - Save

Message Key

Transfer

Mute

EMAIL

- Place and receive calls when away from the office.
- Import contacts from your office/school.
- Check voicemail
- Chat