

CUSTOMER VOIP GUIDE



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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.



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

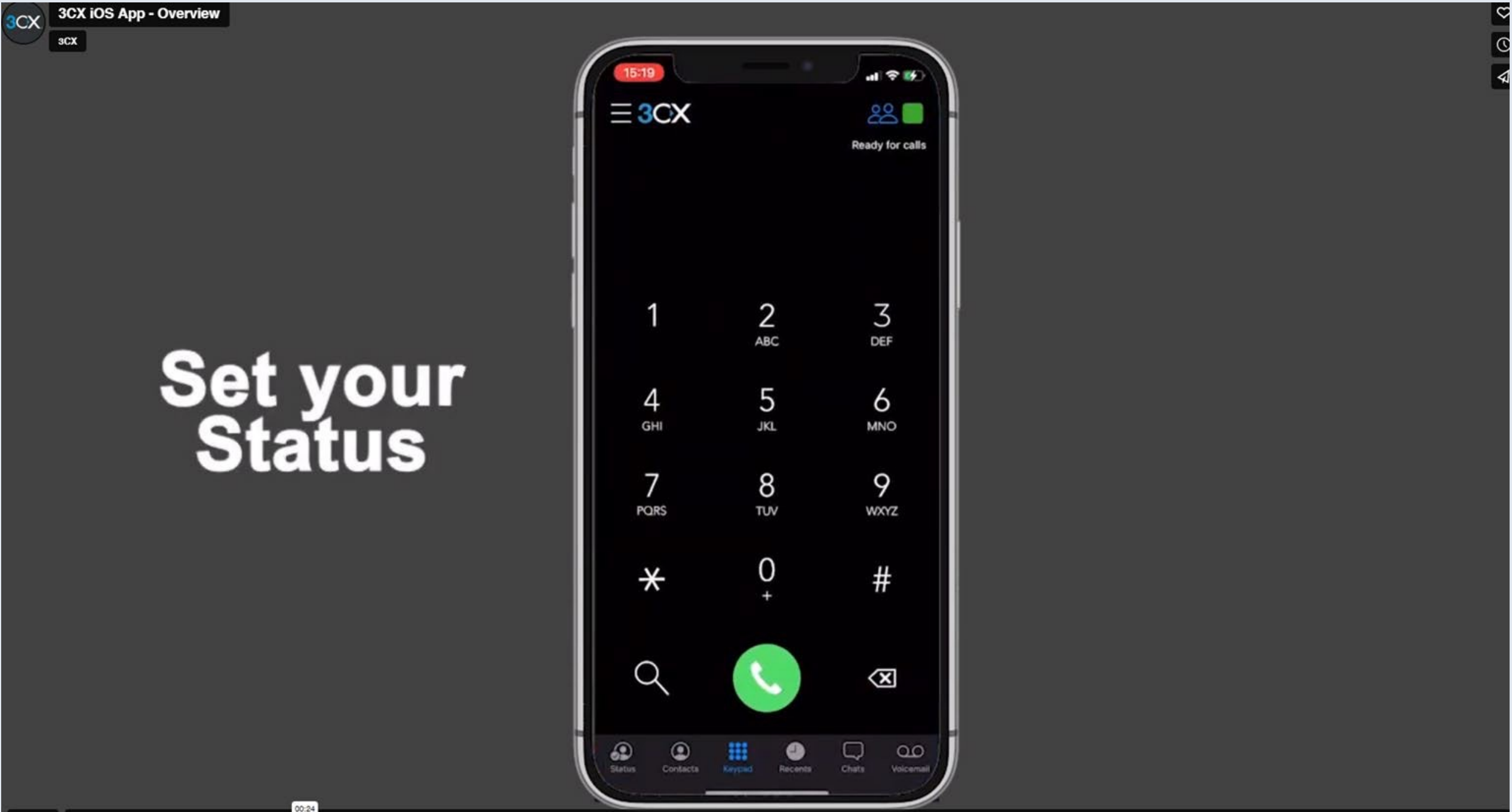


- Hit the message button & enter PIN#
- Press * to play messages
- Press 9 for options
 - 1 profile status
 - 4 to delete all read messages
 - 5 to change self identification
 - 6 mailbox information
 - 7 to change pin number
 - 8 greeting message

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



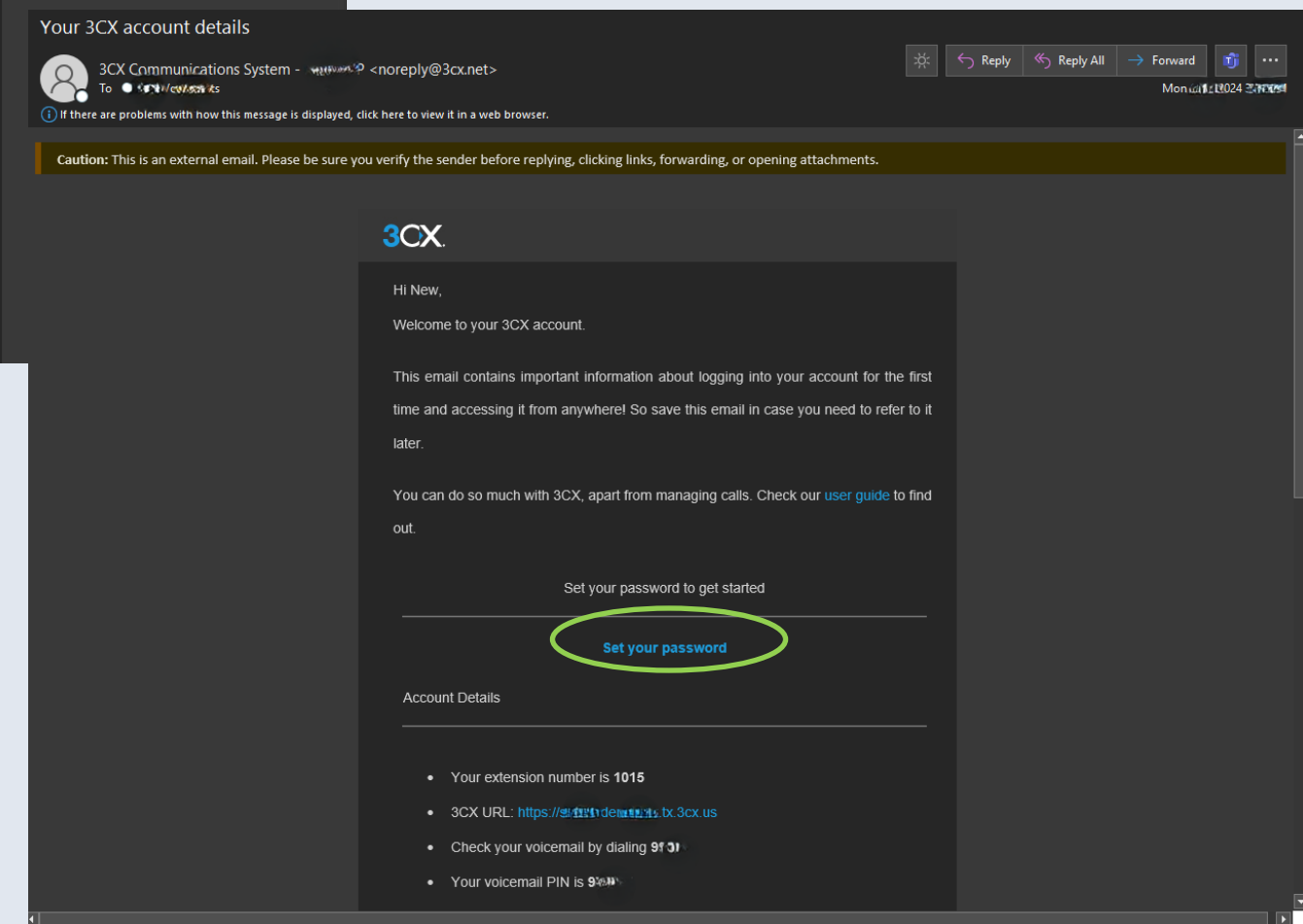
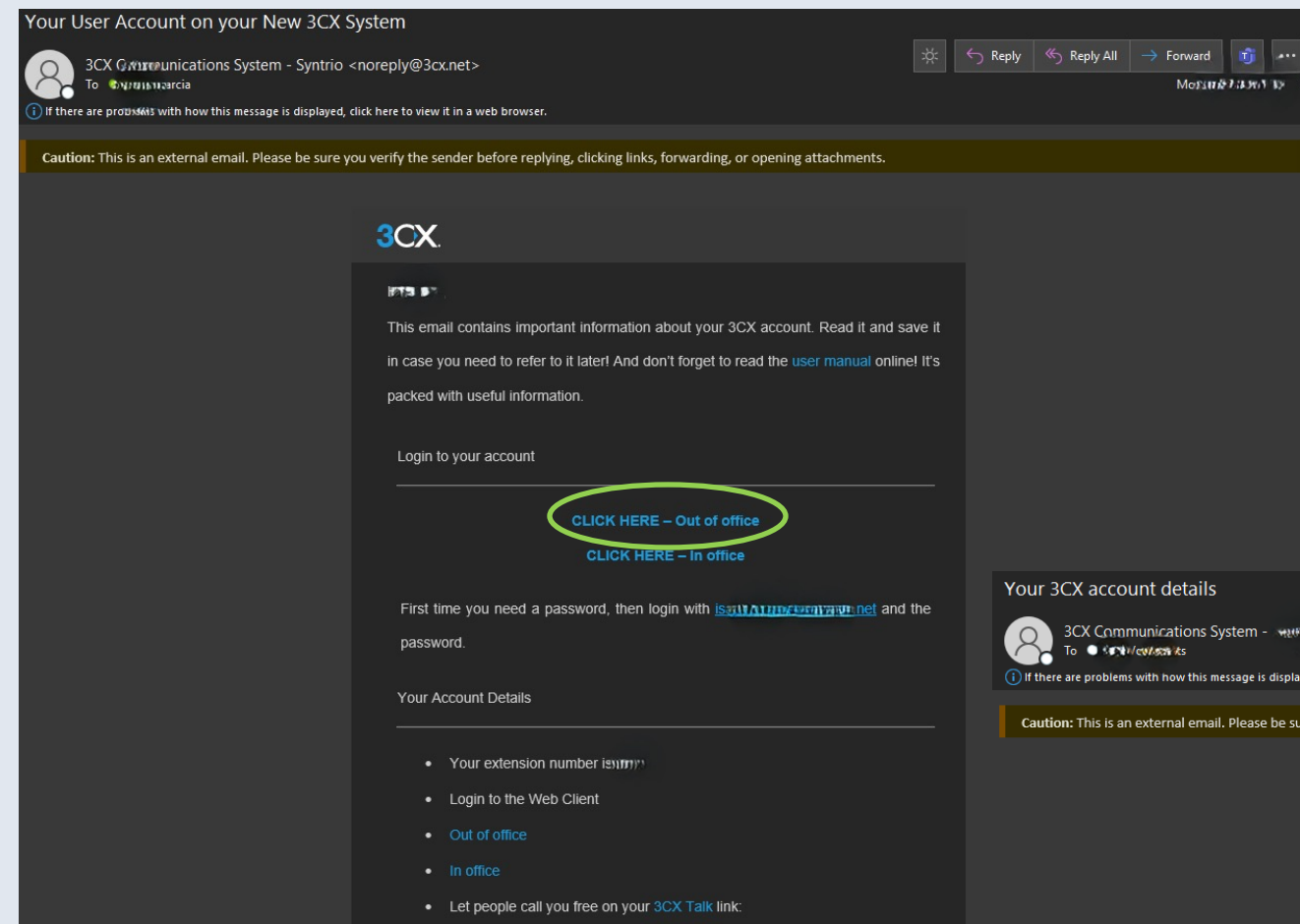
MOBILE APP



MOBILE APP



- Download 3CX app from app store
- Press “Out of office” or “Set your password” in 3CX Welcome Email.



MOBILE APP

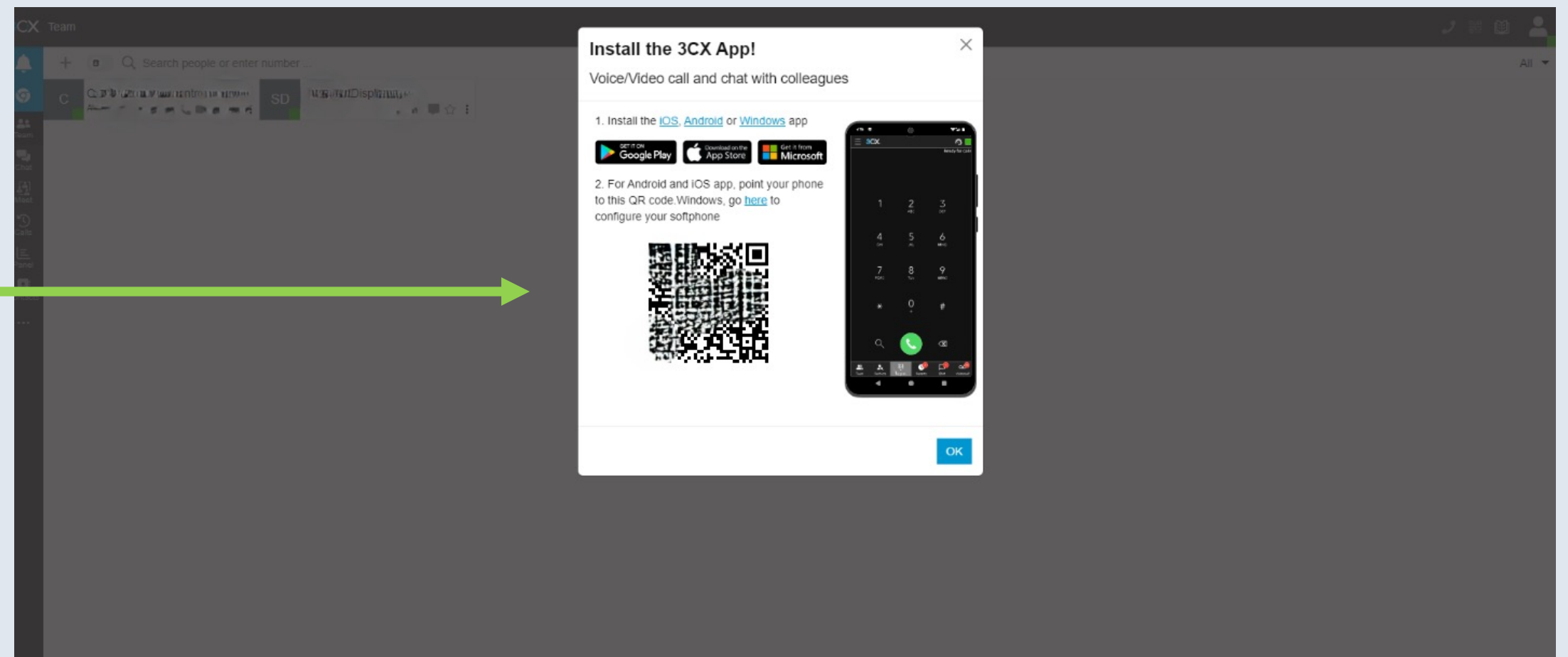


- Create new password
- Log into the 3CX Web Client with your extension number and new password.

Your QR code will appear here



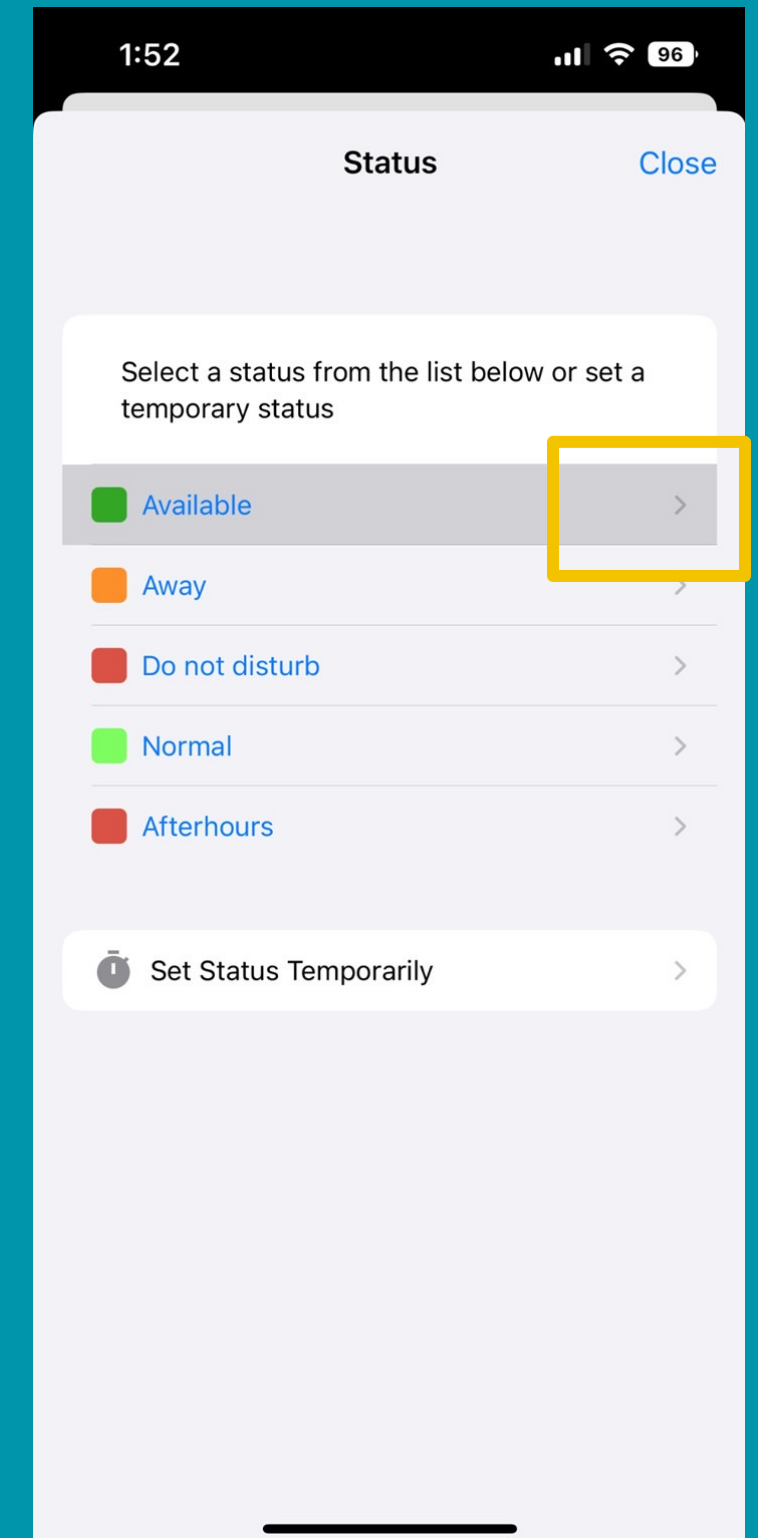
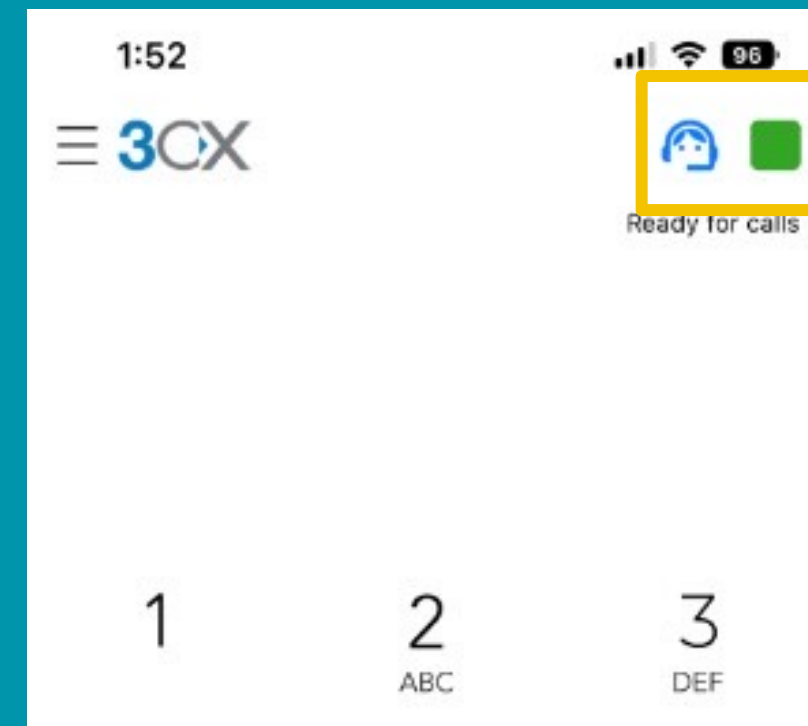
- If you click “Ok” before scanning the QR code, press the QR code image on the top right-hand side.



HOW TO TURN OFF MOBILE APP



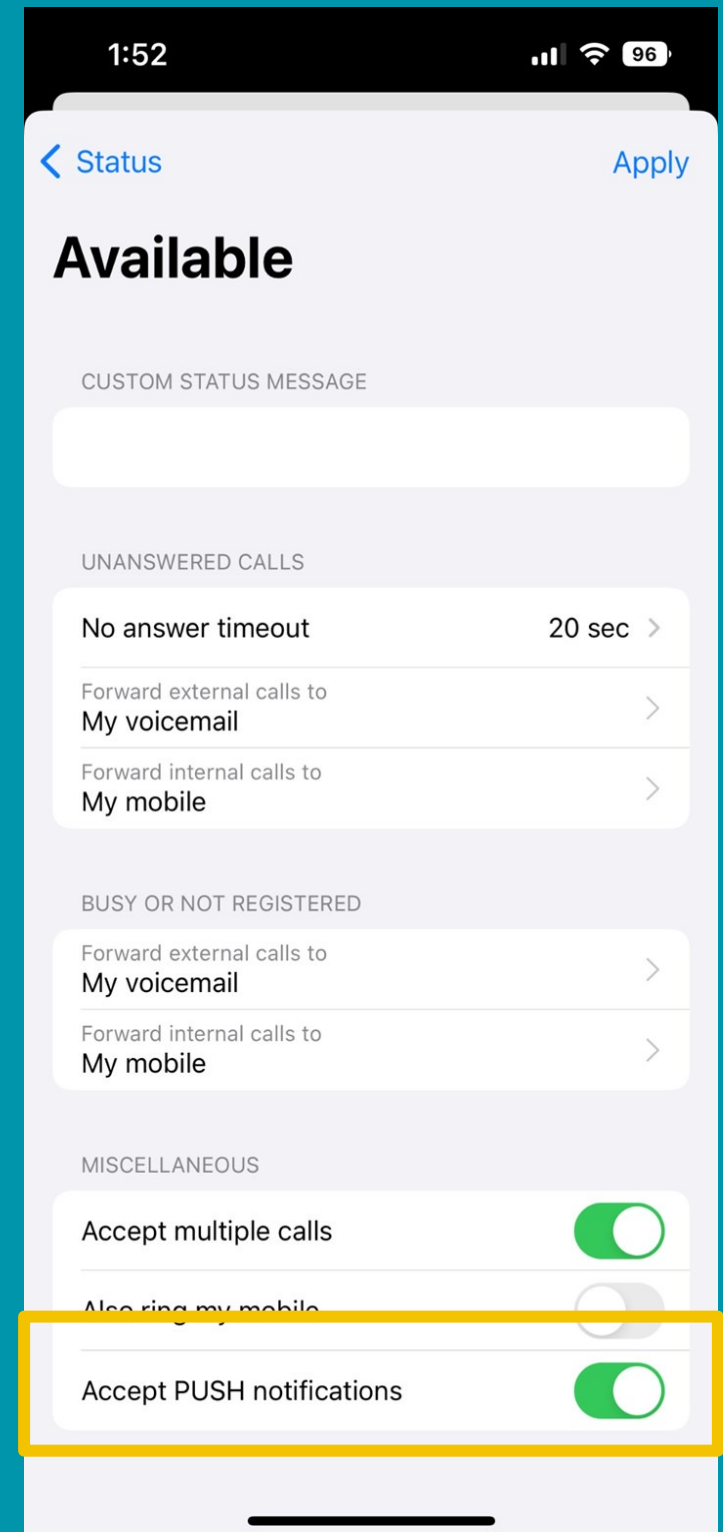
- Click the GREEN BOX
- Click the ARROW next to AVAILABLE
- *continue to next slide



HOW TO TURN OFF MOBILE APP



- Turn off ACCEPT PUSH NOTIFICATIONS



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.

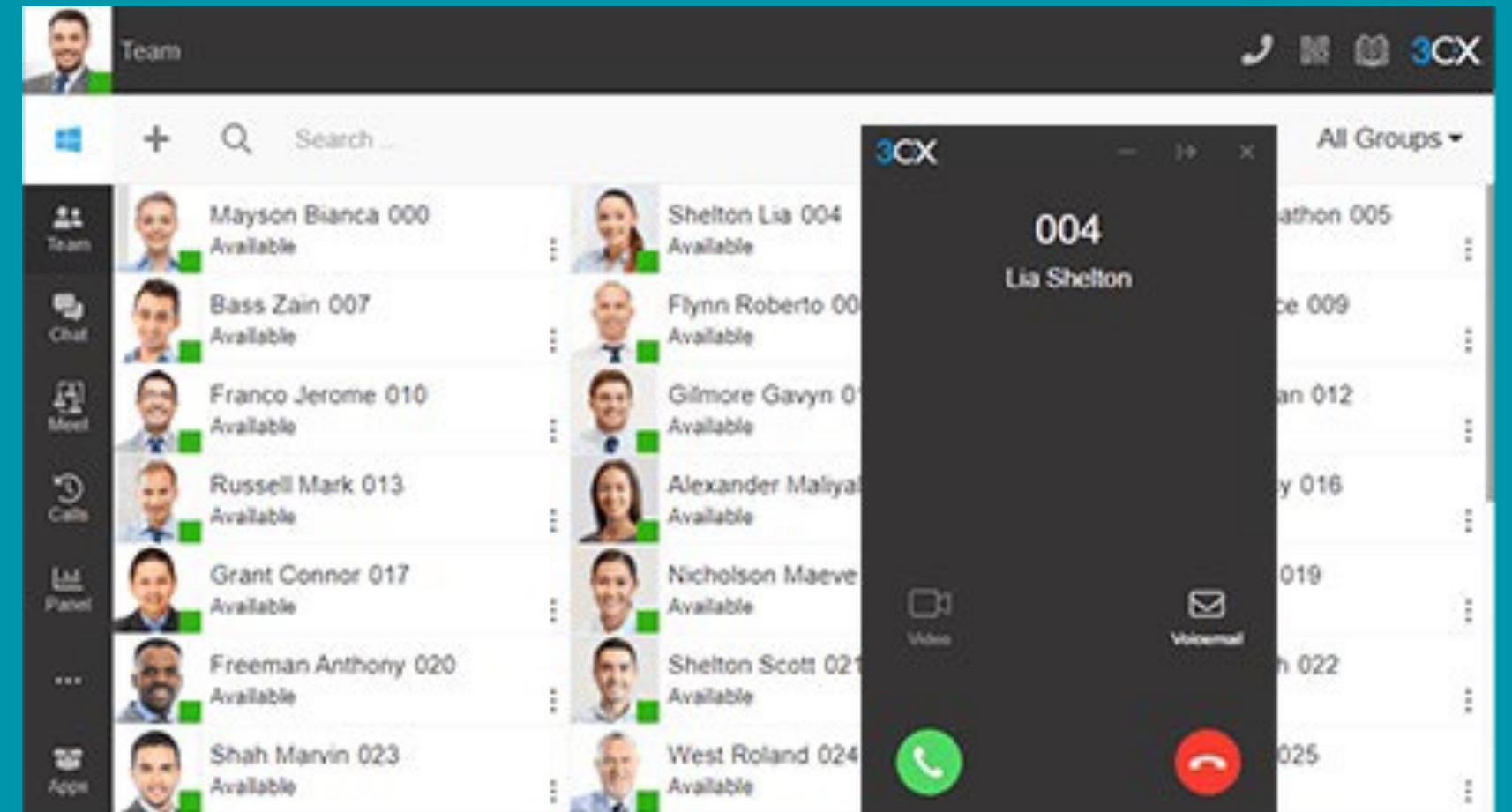
WEBCLIENT & WINDOWS CLIENT



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

[CHECK OUT THE VIDEO](#)

[CHECK OUT THE WEBSITE](#)



Yealink T43U



Yealink T46U



SIDECAR



Yealink CP935



YealinkW77R - Wireless



YealinkW77P – 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



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

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EMAIL



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