

3CX Phone - a visual guide



- **Call Pop-up** – Upon receiving a call, 3CXPhone will allow you to reject the call, transfer the call to another person or to voice mail - with a single mouse click or by using drag and drop.
- **Easy Call Transfer / Park** – When on a call, you can transfer or park a call with a mouse click or via drag and drop, no need to learn dial codes or call transfer procedures on a phone.
- **Presence** – The status of the other extensions is displayed, allowing you to avoid unnecessary calls or call transfers to colleagues that are busy. 3CXPhone will display different information based on whether you are a standard user, a manager and the customization of your Group Rights within your extension settings.
- **Click to Call** – Launch calls with a couple of mouse clicks. Double click on an extension to bring up the extension options to make a call, leave a voice mail, and chat. The call will automatically be launched without requiring you to dial the number.
- **Hotkey Dialing** – Select a number from a web page or document and press a hotkey to paste it automatically to your dialing screen then press enter to launch the call.
- **Text Chat** – Message other users one to one or create multi user chat using the in-built chat options.
- **Phonebook** – 3CXPhone provides easy access to the company and to the personal phonebook. It allows users to initiate calls by searching for contacts and by double clicking on the contact. It offers users the option of calling, leaving a voice mail, conferencing and other alternative functions. When the call option is selected, it will automatically resolve the number and launch the call.

Setting your Presence (Status) Manually:

- Click on the status area, top right above the 3CX logo.
- From the menu, select your desired status and click on it.
- Available – you are at your desk and available to take calls.
- Away – generally used when you are away from your desk.
- Out of Office – used when you are physically out of the office.
- Custom #1 – a custom online status that is configured when setting its forwarding rules.



- Custom #2 – a custom out of office status that is configured when setting its forwarding rules.
- You may also type a custom status message to go along with your selected status. For example you can set your presence to “Away” and the custom status message to “In a business meeting” to provide more information.

Setting your Presence (Status) Automatically:

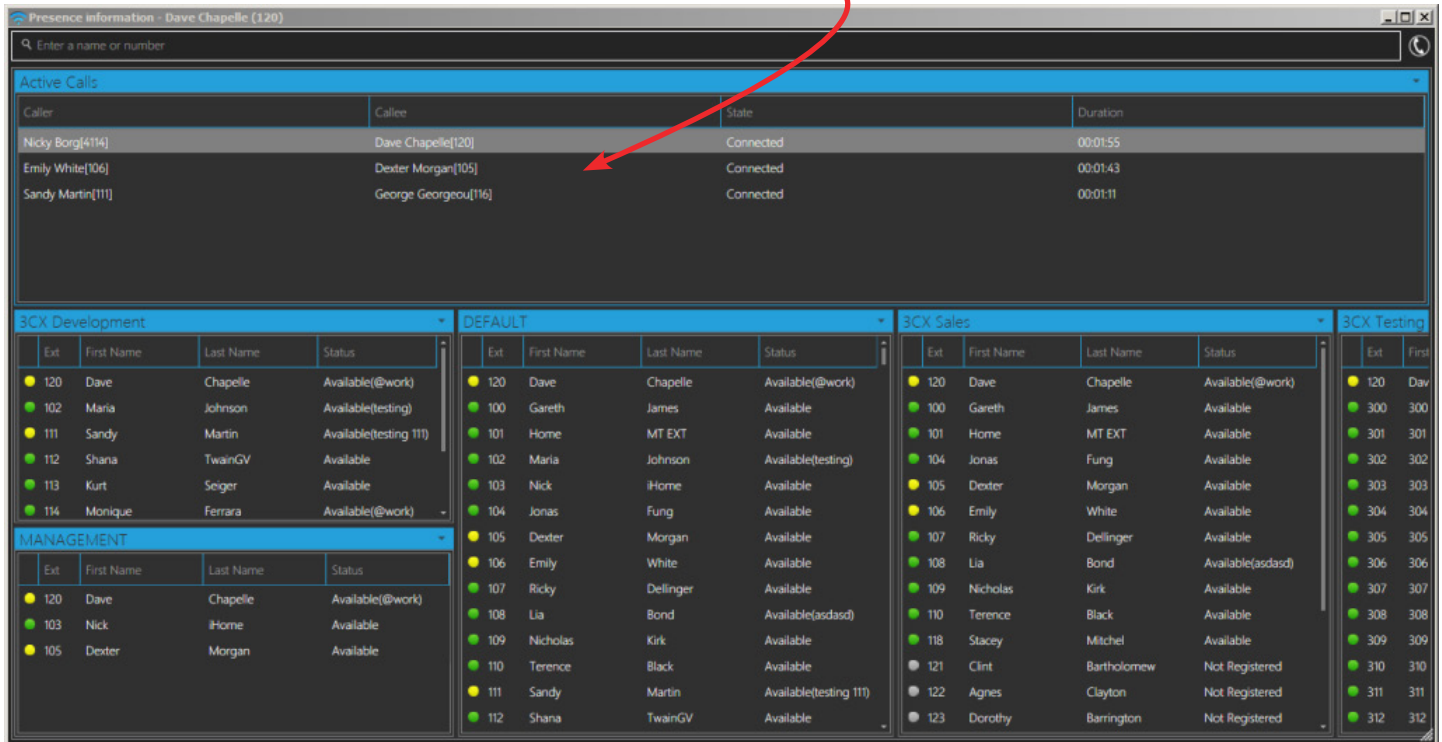
You can have your status set to “Out of office”, “Available” or “Away” automatically based on your office hours. This has to be done by the system administrator. Ask your administrator about this feature. During office hours you will be logged in as “Available” and when your office hours end your 3CXPhone will switch its status to “Out of office” automatically.

Seeing the Presence/Status of your colleagues:

Presence allows you to check the status of an extension so that you are aware of who is Busy, who is Available and who is Away. This is especially useful when you are dealing with customers and queues as in the case of trying to transfer a customer to another extension. If you can instantly see the status of each agent then you can transfer the call faster and easier which means your workload is lighter, you perform faster and the customer benefits from a smoother experience and service.

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This is the presence window. It may look complicated, but it really isn't. This is the area you want to pay attention to most



Why that area? Because it is the active call area. The most used area of the window!

The presence window is the most powerful tool for:

- transferring calls
- diverting calls to voice mail
- parking a call
- dropping a call
- conferencing a call

Types of Transfers

3CXPhone for Windows allows you to easily transfer calls to other users using either a "Blind" or an "Attended" transfer. In a Blind Transfer the call is transferred without notifying the recipient. In an Attended Transfer the recipient is notified by the person performing the transfer (while the caller is on hold) and if the recipient agrees to take the call then the transfer is performed.

Transfer a call using the presence screen

Simply drag and drop on the extension desired. Right click an active call for more options.