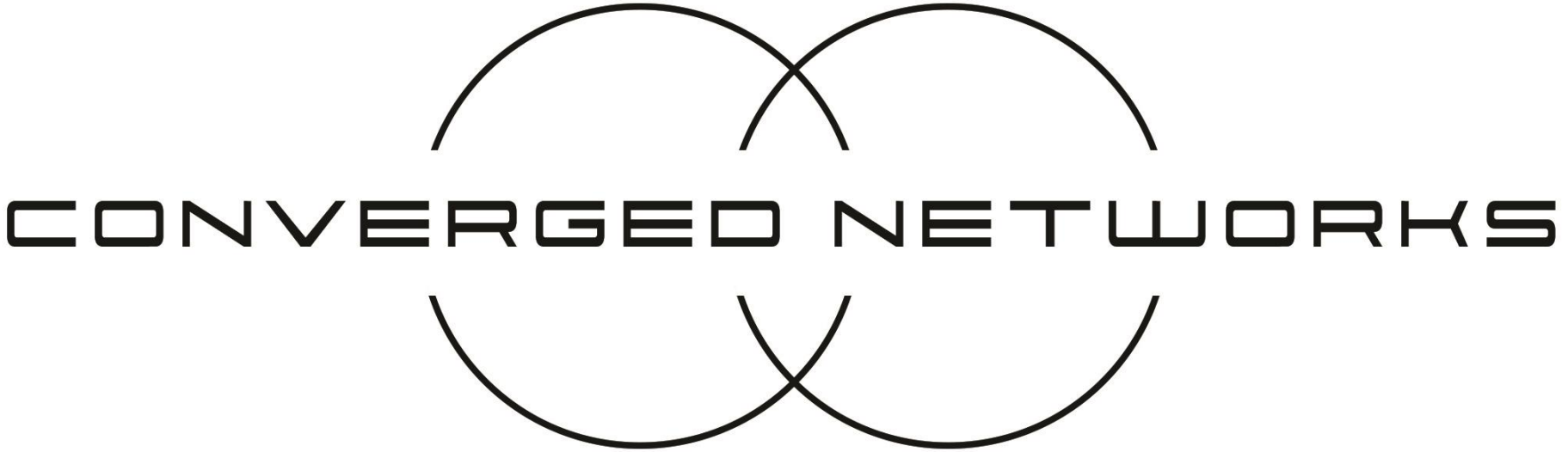
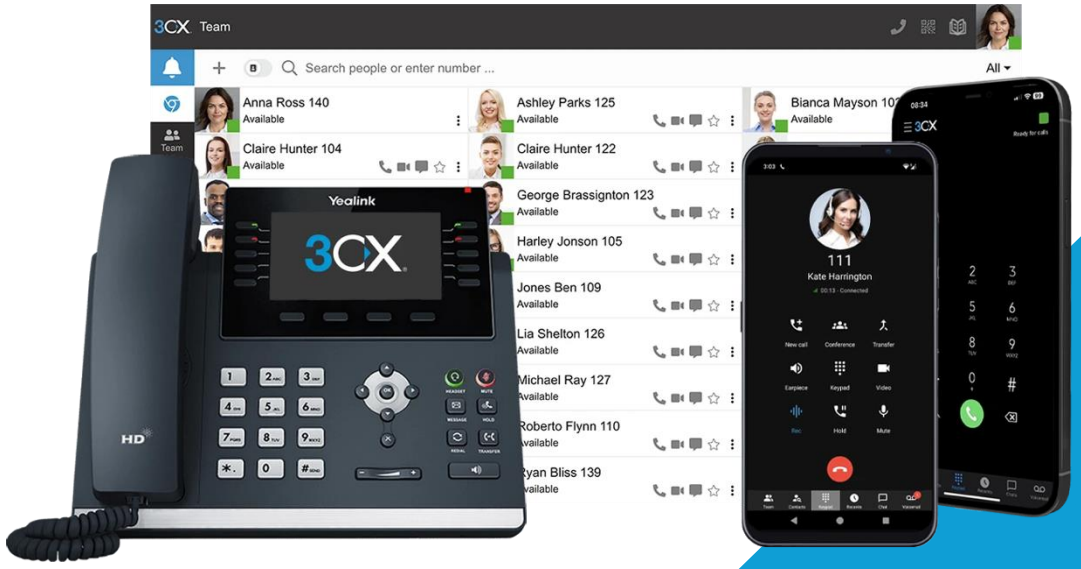


3CX v20 – Web Client Guide

Converged Networks, LLC

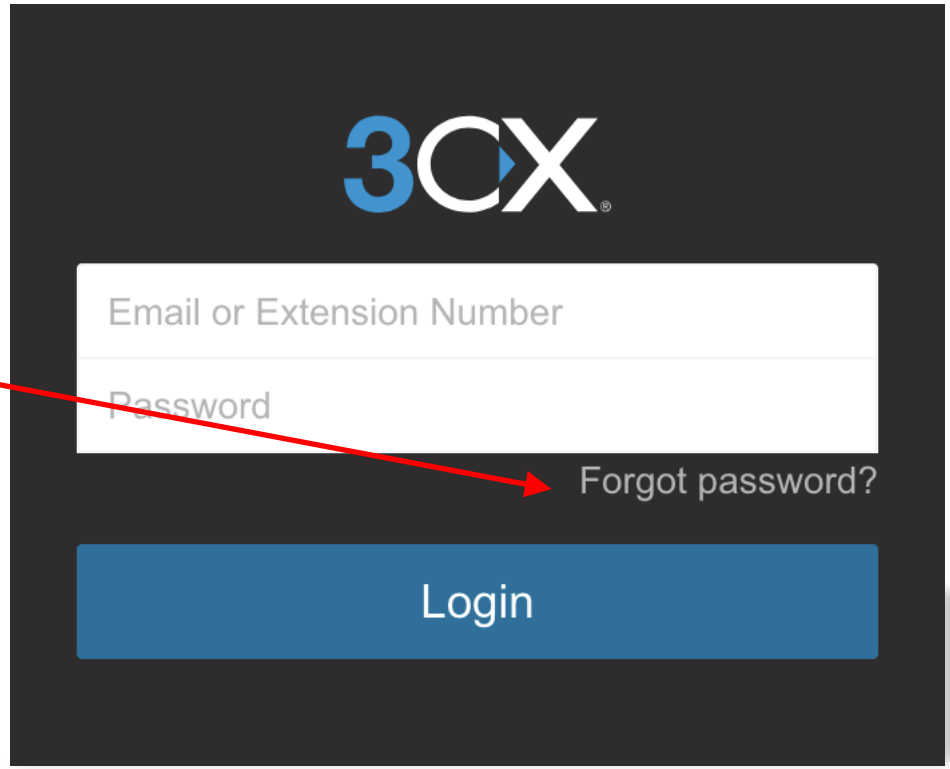
What is the Web Client?

The web client is a WebRTC based browser application that allows you to use your phone extension on any browser that supports WebRTC like Edge, Chrome, and Firefox. You also gain access to features like messaging, SMS, video conferencing, voicemail access, call forwarding controls and much more.



Logging In

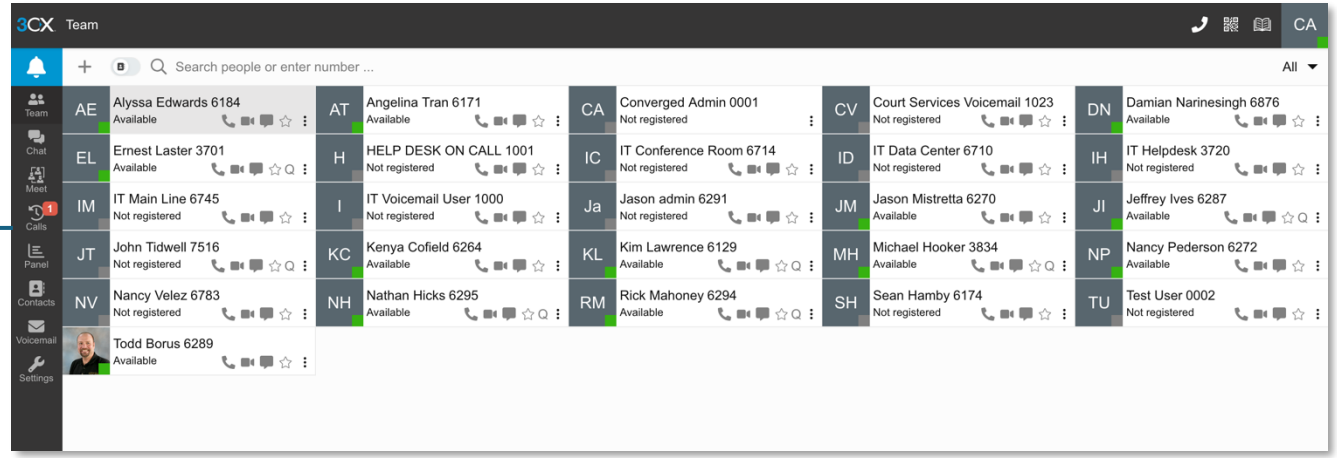
You will receive a welcome email which includes a link to set your password. You may also access the system by navigating to the link below and clicking the “Forgot Password” link to trigger the email. You must have a valid user on the system to use this feature.

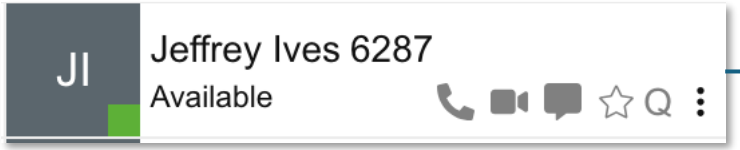


Note: If your organization has single sign on configured, you will have a “Log in with Google” or ”Log in with M365” button. Click the appropriate link and log in using your email credentials.

Web Client Navigation

Once logged in, you will be on the TEAM window. This will allow you to see other users on the system and their status. It will also allow you to interact with those users with a few shortcuts on the user panel.

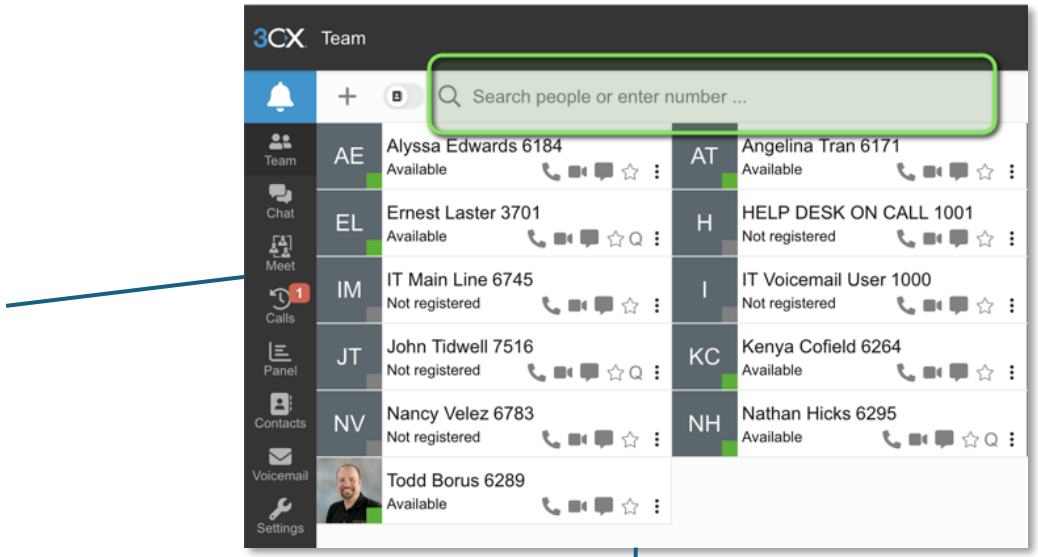




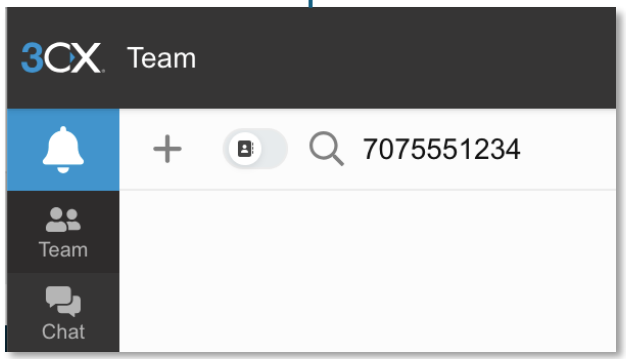
The user's name and extension number as well as their status are visible on the left side of the panel. There are icons available on the bottom right that give you access to call, video conference, chat, and favorite the user. If the user is in a call queue, a "Q" will also appear in this area. Additional options are available by clicking the 3 small dots in the bottom right of the panel.

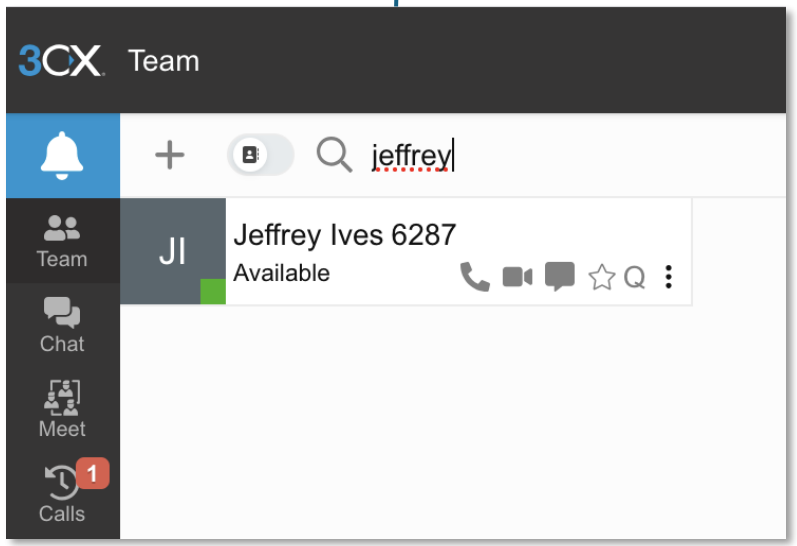
Search Bar

The seach bar is located along the top of the page above the user panels. This bar allows you to search for a name or extension number. If you are using the ALL view, this will help you find users quickly. The more you type, the more accurate the results.

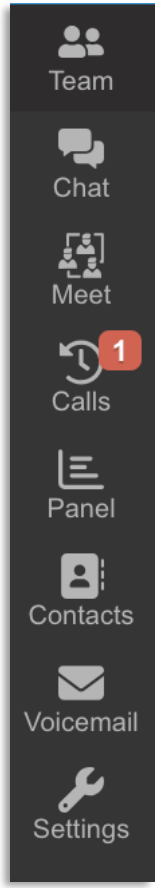


Tip: You can call a phone number or extension by typing it in the search bar and pressing ENTER.





Menus



The main menu is located vertically down the left-hand side of the web client window. This accesses major features of the system.

Chat - Internal person-to-person, group chats, SMS, and MMS are available.

Meet - Video conferencing including off-system participants. Share documents, screens and collaborate.

Calls - Your extension's call history.

Panel - Access to view active calls if you are a member of a queue or group. Queue managers can see and manage their queue agents and see real-time queue statistics.

Contacts - Personal and Company contacts.

Voicemail - Play, delete, and download your voicemails.

Settings - Manage settings for your extensions. Things like call forwarding, voicemail greetings, themes, chat and audio settings.



A menu contaning the dialer, your QR code for the softphone app, and your status icon are in the upper right corner of the window.

Chat

The chat function allows for both internal and external chats via SMS and MMS. You can send images and other media files for either type of chat.

The chat option has 4 areas.

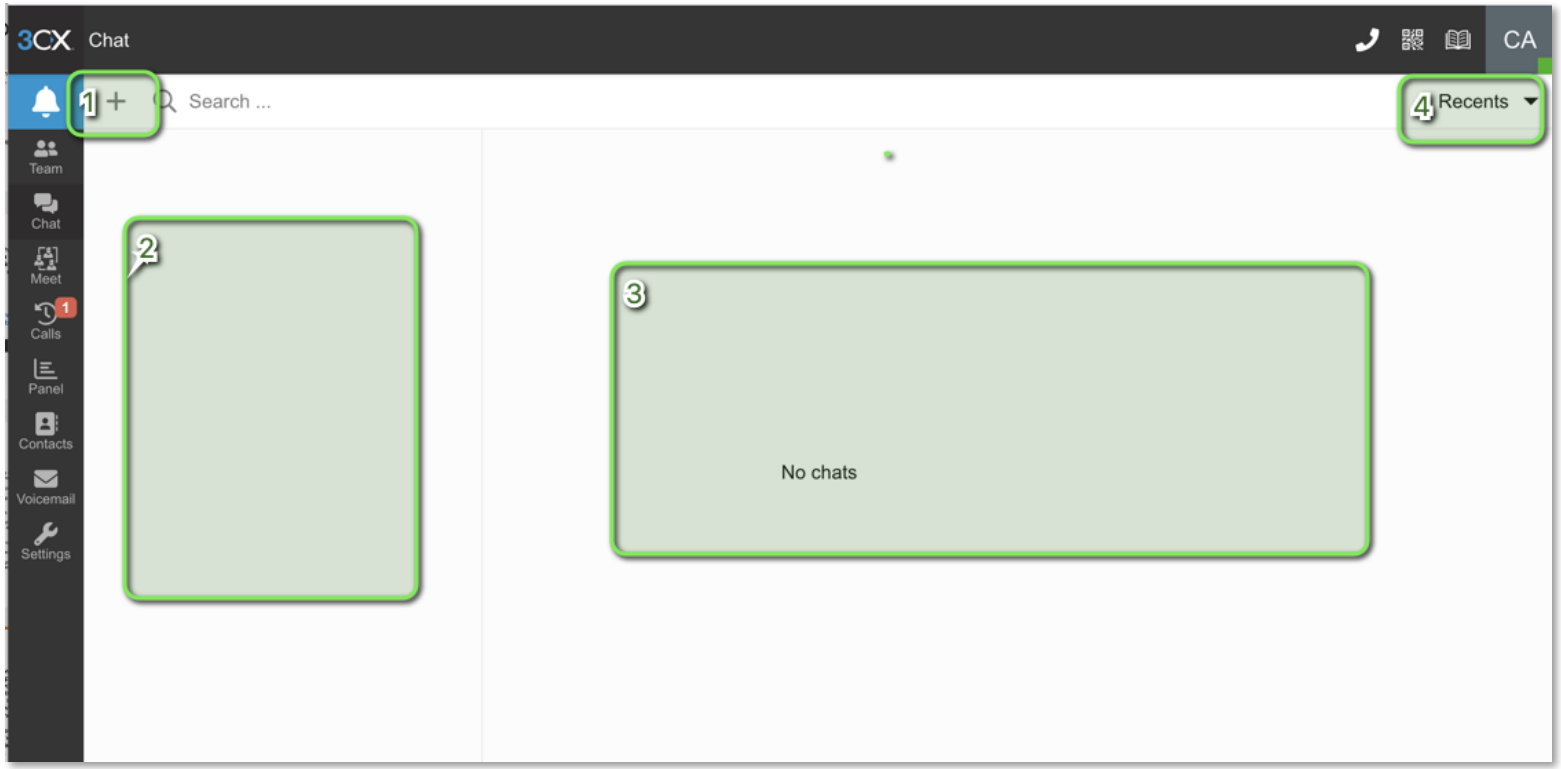
1. Create a new person to person or group chat.

2. Existing chats. Click on a chat to see the thread to the right.

3. The active chat thread you are viewing.

4. Sort by recent, archived, and chat queues (if you are a member of a queue).

Tip: Use the search bar to search a name or any text that appears in any chat.

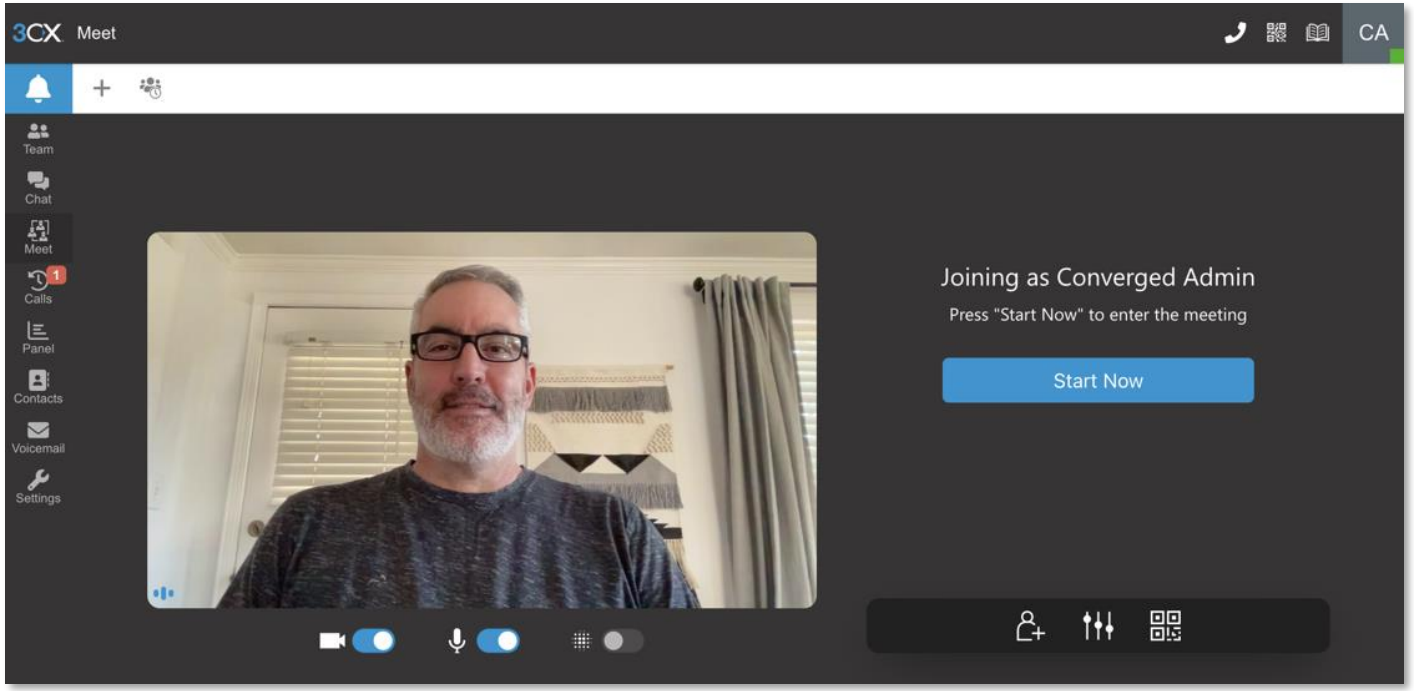


Meet

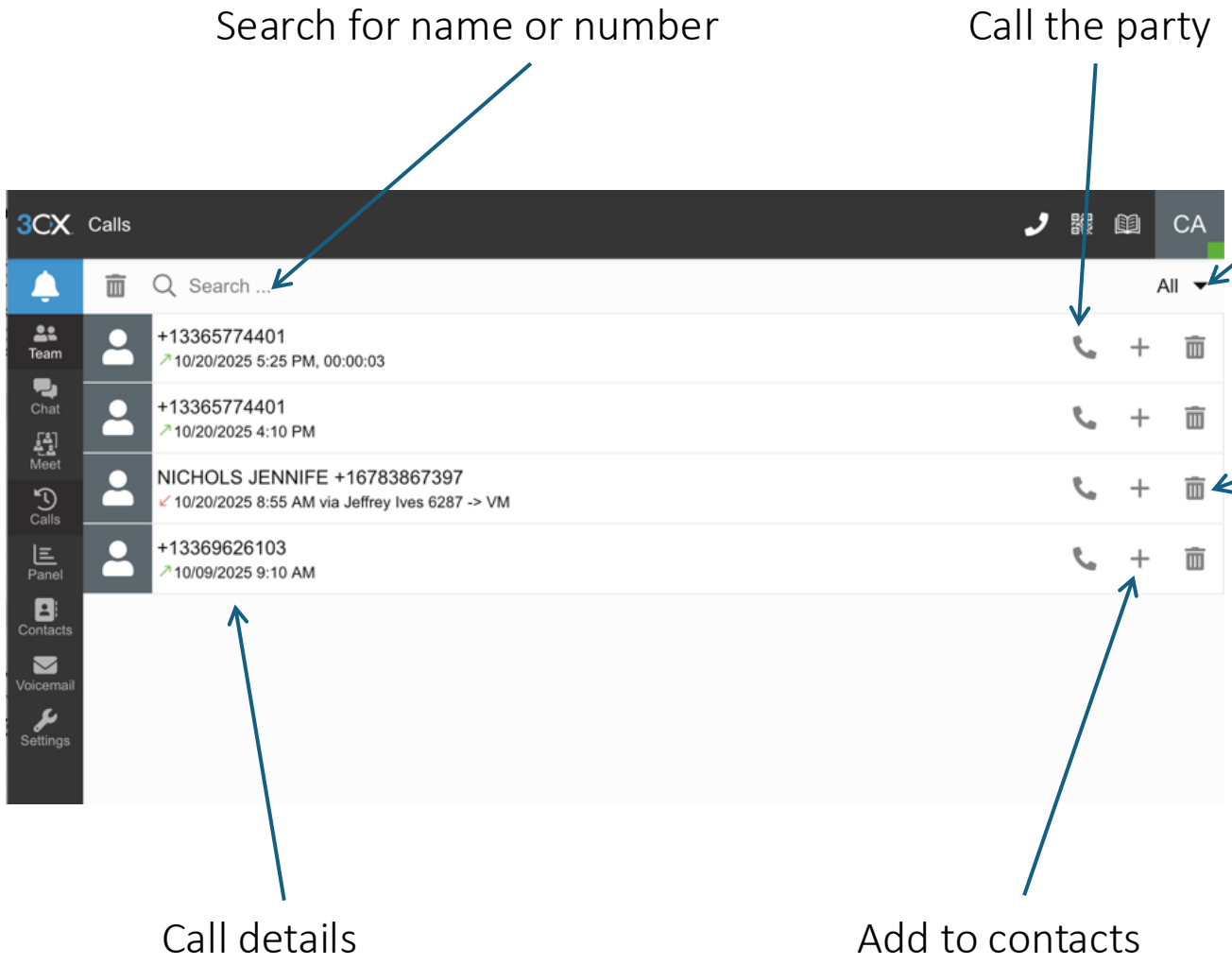
Host web meetings with ease. Simply click the Start Now button to begin a meeting and invite participants or click the + icon in the upper left to schedule a meeting for a future time.

For a detailed guide on the meeting client, click the guide book in the upper right corner of the screen.





Calls (call history)

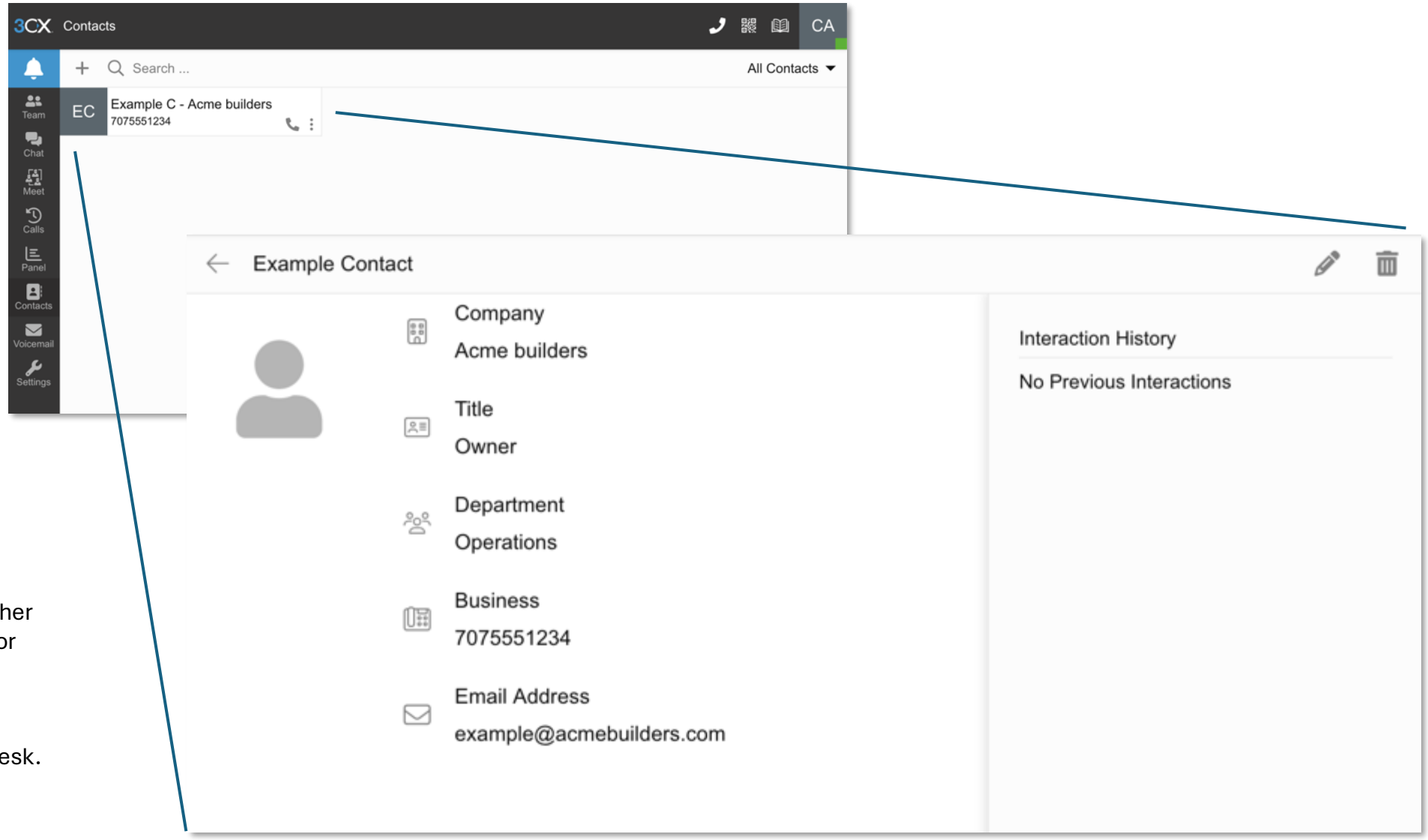


Note: Deleting a call from your web client history will not delete the record for the server call history. Only from your view.

Contacts

Contacts will allow you to see both company and personal contacts and your engagements with them via the phone system.

Company contacts are managed by system administrators and personal contacts are only visible to you.



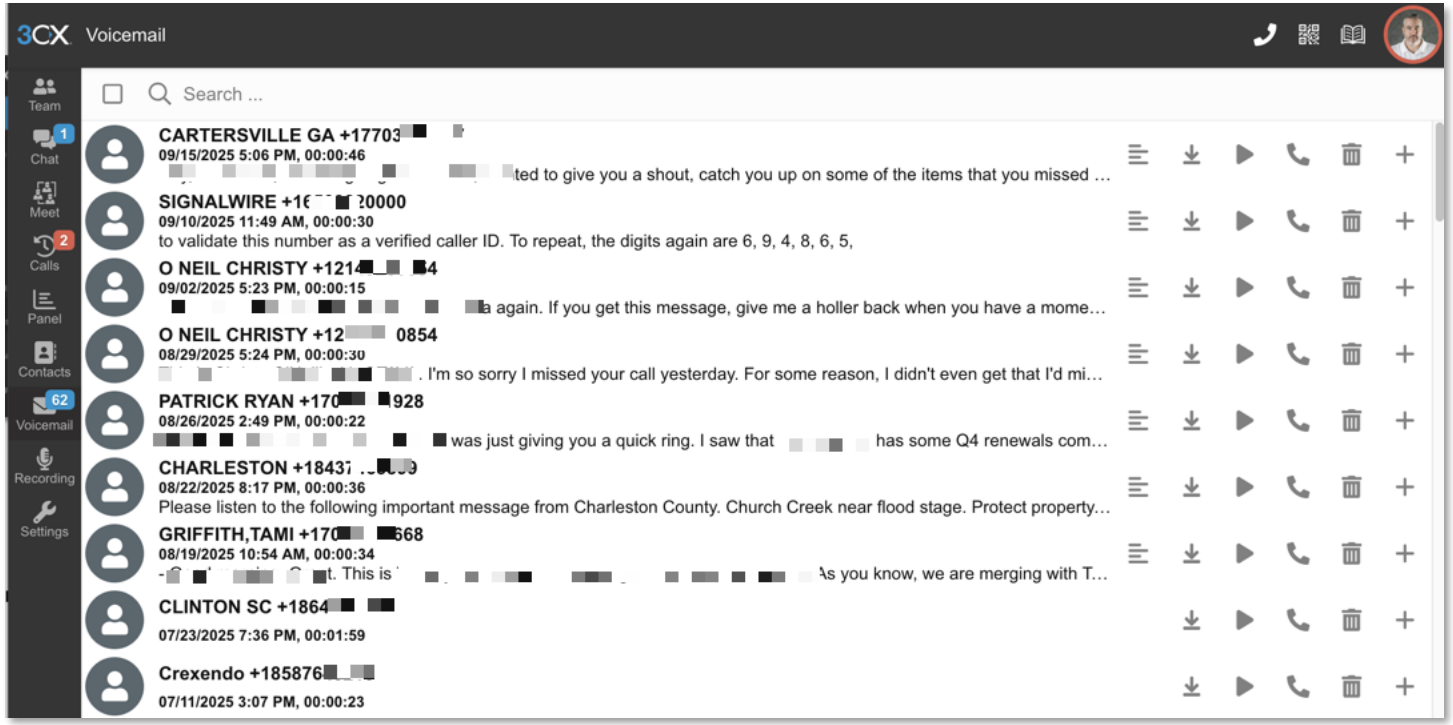
Clicking on a contact expands the information to give greater detail.

You may also import contacts from other contact management toos like M365 or Google contacts.

For assistance with 3rd party contact integration, please contact the help desk.

Voicemail

Voicemail allows complete management of voicemails for your extension. If transcription is available for a voicemail, you will be able to see the transcription. You may use the options to the right of each message to perform the actions below:



View Transcription

Download

Play

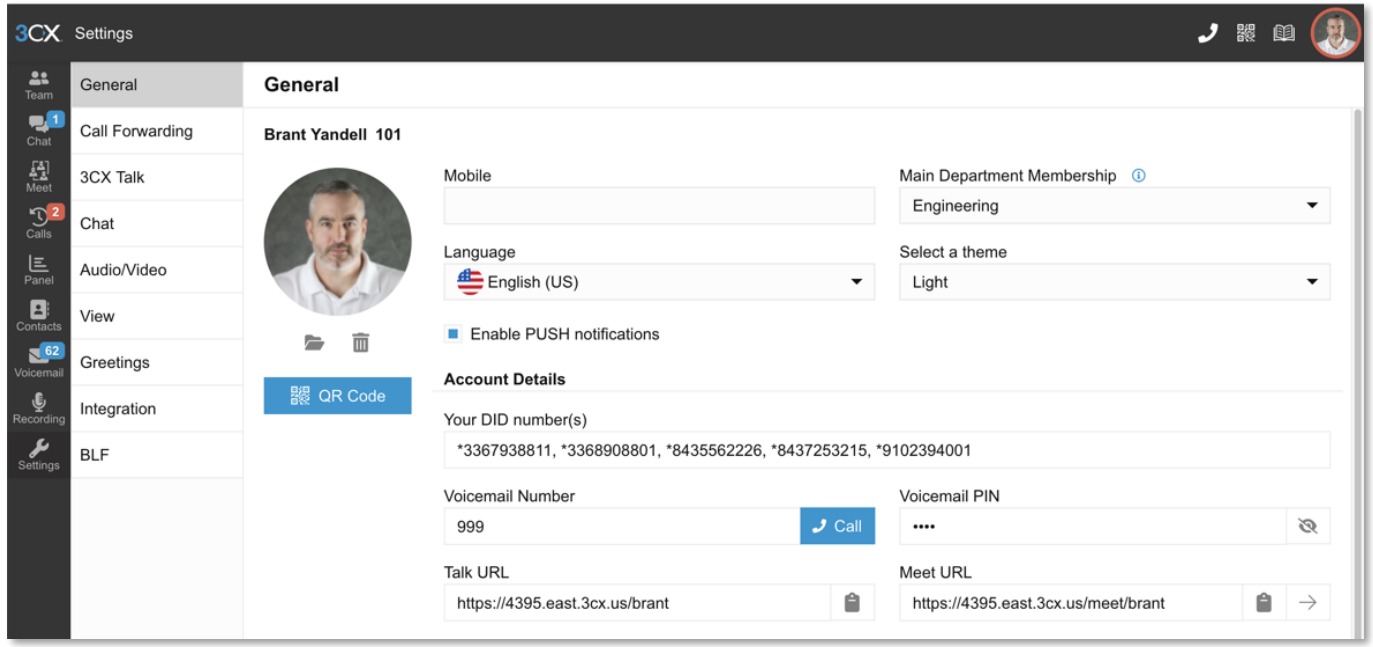
Call the party

Delete

Add party to contacts

Settings

This menu option allows you to configure settings for your extension and its behavior. You may change settings like your profile picture and the color theme, the default sorting of your teams page, voicemail greetings, forwarding settings, and more.



Call Forwarding sets the behavior of your extension when you are in different statuses like Available or DND.

Greetings allows you to configure different greetings for different statuses.

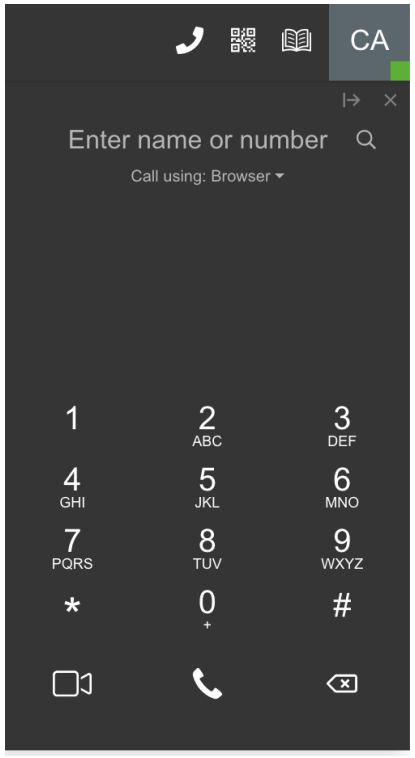
BLFs are the buttons on your physical desk phone if you have one. They also show up on the dialer in the web client.

This section is designed to let you personalize how you interact with the phone system. Explore each sub section at your leisure.

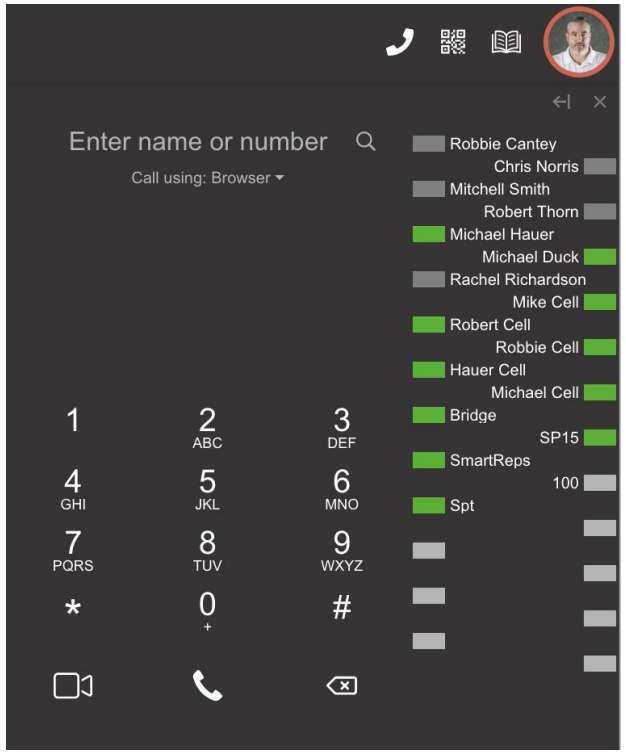
Dialer

The dialer will appear in the upper right of the web client when you receive a call. You may also access the dialer by clicking the small phone icon in the upper right of the client window. Here are some examples of how the dialer changes appearance as you use the system.

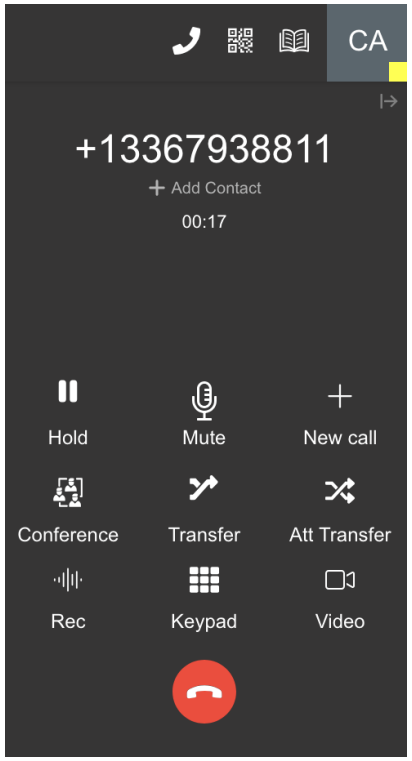
Simple Dialer



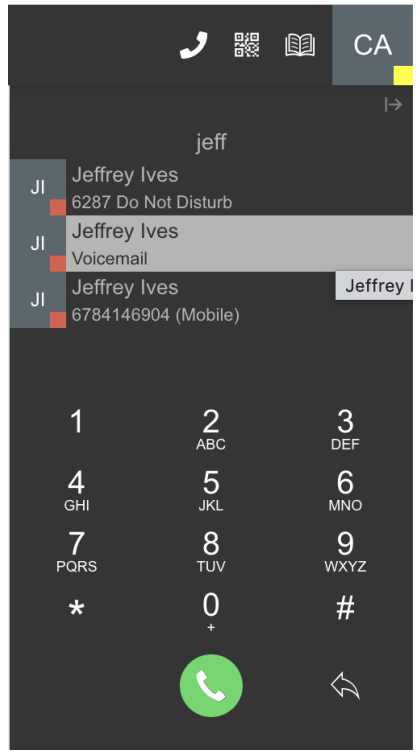
Dialer w/ BLFs



Active Call



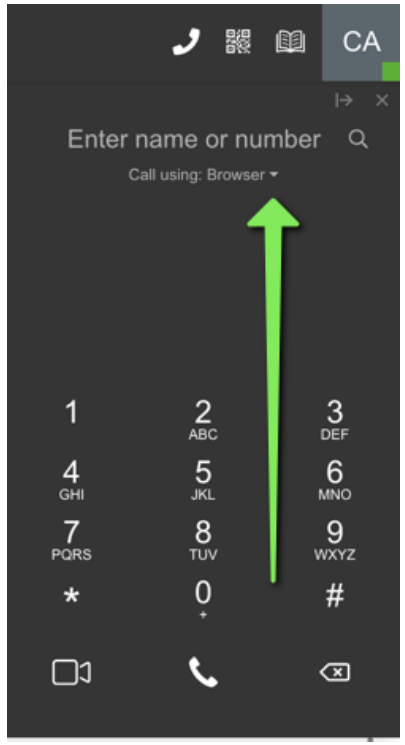
Call Transfer



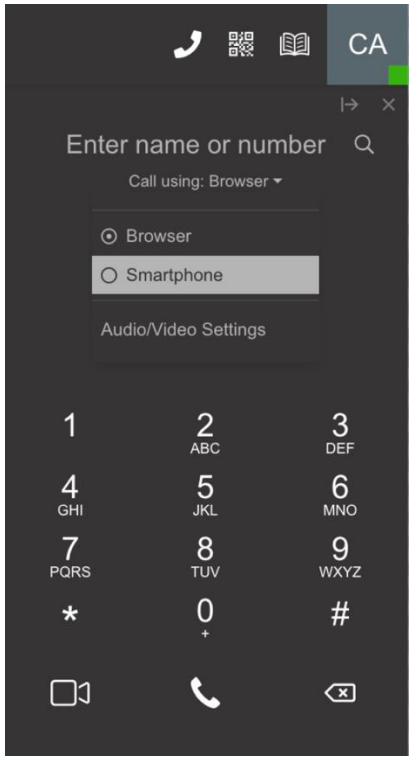
Dialer: ‘Call Using’

You may change what device is used to make calls by changing the drop-down selection near the top of the dialer window.

Click the drop-down menu



Select the default dialing device



Note: You will see any device you have provisioned to your extension in the drop-down menu. The selected device will be used to make calls when you click on a user on the Team window, or enter a 10-digit phone number into the dialer and hit enter or click the call button.

Dialer Continued

There are 10 icons available when you are in an active call. They are:

Hold: Places a call on hold.

Mute: Mutes your input device (microphone).

New Call: Puts your caller on hold and lets you make another call.

Conference: 3-way call. Places your caller on hold and lets you call another number. Once connected, press again to merge the calls.

Transfer: Blind transfers the call to a user, a user's voicemail or a 10 digit number.

Attended Transfer: Places your caller on hold, lets you call another user and announce the call, then complete the call or cancel and speak to the caller if the user is not available.

Record: Starts recording the call beginning at the moment you press the icon.

Keypad: Display the dialpad.

Video: Start a video call with another system user.

Hang up: Ends the current call.

