



# RANGE

3CX PBX

END USER QUICK START GUIDE

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# 1. INTRODUCTION

Welcome to your new phone!

This guide will help you set up and become comfortable with basic and advanced features on your new phone.

Some advanced calling features may need to be activated by Range.

If you want features activated, any problems or need a more detailed description of the operation of your phone, then please contact us.

## 2. QUICK REFERENCE INFORMATION

Your phone number \_\_\_\_\_

Your extension \_\_\_\_\_

Access your phone settings online – Internal \_\_\_\_\_

Access your phone settings online – External \_\_\_\_\_

Conferencing phone number \_\_\_\_\_

Conferencing moderator code \_\_\_\_\_

Conferencing participant code \_\_\_\_\_

Conferencing moderator web access \_\_\_\_\_

Your administrator \_\_\_\_\_

Your administrator's phone number \_\_\_\_\_

## **3. CALLING**

### **3.1 INTERNAL CALLS**

To call another person in your business lift the handset and dial the other person's extension. This is typically a 3, 4, or 5-digit number, and may begin with #.

On the cordless handsets, dial the extension and then hit the **Send** key.

Note that depending on your phone type and configuration the call may not complete automatically once you have finished dialing and you may need to hit the **Send** key once you have dialed the number.

### **3.2 EXTERNAL CALLS**

To call a number outside of your business lift the handset and dial the phone number.

On the cordless handsets, dial the phone number and then hit the **Send** key.

Depending on your phone system you may need to dial a code at the beginning of the phone number to indicate you are making an external call.

Note that depending on your phone type and configuration the call may not complete automatically once you have finished dialing and you may need to hit the **Send** key once you have dialed the number.

### **3.3 EMERGENCY CALLS**

In an emergency lift the handset and dial 911. If you need to dial a code when calling an external number you will also need to dial that code before calling 911.

On the cordless handsets, dial 911 and then hit the **Send** key.

Note that depending on your phone type and configuration the call may not complete automatically once you have finished dialing and you may need to hit the **Send** key once you have dialed the number. *\*Please refer to the VOIP E911 Disclosure Addendum for IP-Based Voice Customers for more information.*

### **3.4 SPEAKER PHONE**

To make a call using your speaker phone, either press the Speaker key or leave the handset on-hook and dial the number of the person you want to call, followed by the **Send** key.

### **3.5 ENDING CALLS**

To end a call, replace the handset or press the **End Call** key.

## 3.6 ANSWERING CALLS

To answer an incoming call, lift your handset and you will be connected to the caller.

To answer a call using the speakerphone, do not lift the handset and instead press the **Speaker** key.

To answer a call using the headset, lift the headset from the docking station and you will be connected to the caller. If the headset is off the docking station, press the handset button to connect to the caller.

To answer a call using the cordless handset, press the green **Send** key.

## 4. CALL FORWARDING

### 4.1 INTRODUCTION

Call Forwarding can only be enabled or disabled on the Web Client Dashboard. Normally, the default is to send calls to a voicemail box.

- **Immediate** (sometimes called **Unconditional**) **Call Forwarding** is where all calls are forwarded to the number of your choice. This can either be to your voicemail (which is the default), another extension in your business or an external number.
- **Busy Call Forwarding** forwards all calls that are received when you are already on the phone.
- **No Answer** (sometimes called **Delay**) **Call Forwarding** forwards all calls when you do not answer them after a certain delay.

### 4.2 ENABLING

To enable **Call Forwarding** follow these steps:

1. Log into the Dashboard
2. On the left side, under "3CX", click "Settings" and then "Call Forwarding"
3. Then select the status you would like to format.
  - a. Available
  - b. Away
  - c. Do Not Disturb
  - d. Lunch
  - e. Business Trip
  - f. Exceptions
4. If you want to forward Unanswered Calls while you are available, click "Available" and under "Unanswered Calls" click the "Forward External Calls to" drop down tab to select where you want the call forwarded to. For internal calls, click the "Forward Internal Calls to" drop down.

## 5. ADVANCED CALL HANDLING

### 5.1 PUTTING A CALL ON HOLD

You can put a call on hold by pressing the **Hold** key. You may now replace the handset without cutting the caller off. You can also make another call or use other phone functions.

To retrieve the call, press the **Resume** key. If you've made another call since you put the first call on hold, you'll need to park that call or put it on hold before you can retrieve the first one.

### 5.2 CALL WAITING

If a second call comes in when you are already on the phone, you will hear a tone and the phone screen will display the details of the second caller.

To answer this second call, select either the **Answer** key or press the line key which is flashing. Answering the second call will automatically put the first call on hold. You can toggle between the calls by placing the current one on hold and retrieving the other call.

### 5.3 TRANSFERRING A CALL

#### 5.3.1 WARM TRANSFER

The warm transfer is the most common transfer. You can speak to the destination agent about the caller's issues and give any background definition necessary. To **Warm** transfer a call, follow these steps:

1. Press the **Transfer** key. This places the current call on hold.
2. Dial the extension you want to transfer the call to.
3. Wait until the person has answered before completing the transfer by pressing the **Transfer** key.

#### 5.3.2 BLIND TRANSFER

A blind transfer sends a caller to another phone number without talking to the new agent first. To **Blind** transfer a call, follow these steps:

1. Press the **Transfer** key. This places the current call on hold.
2. Dial the extension you would like to blind transfer to.
3. Press the **Blind** key (B Transfer) which is the second transfer option on the right side of the screen. It will be a "B" with a handset image.
4. Press the **Green Phone** to complete the blind transfer. The call will automatically end on your side.

#### 5.3.3 TRANSFER TO VOICEMAIL

To transfer a call, follow these steps:

1. Press the **Transfer** key, this places the current call on hold.
2. Dial **\*4** and then the extension of the voicemail box
3. Press the **Green Phone** to complete the transfer to voicemail. Then immediately hang up your handset.

### 5.3.4 TRANSFER CORDLESS ONLY

For **only** cordless transfers

1. Select **Transfer**, OPTIONS then dial \*0 and any number you want 0-9 and push **Transfer**.
  - a. This won't interfere with parked calls on desktop phones, but it will not cause a park button to light up on a desk phone.
2. From the desk phone to retrieve from cordless **only**, pick up the handset dial \*1 and whatever number you chose to park the call on.

### 5.4 THREE WAY CONFERENCING

To conference a third person into a regular two-way phone call, follow these steps.

1. When in a regular call, press the **Conference** key.
2. Dial the **#** or extension you want to join your call.
3. Once the **#** or extension has answered, press the **Conference** key again to join all 3 calls.

### 5.5 CALL PARKING

#### 5.5.1 PARKING A CALL INSTRUCTIONS

Parking a call places the call on hold in a "park orbit" so that the call can be retrieved from another phone. Depending on your phone type, there are two ways of parking a call.

If you have keys on your phone for parking calls, while on a call press the key of the park orbit (SP1 or SP2) where you want the call parked and press the **Transfer** key. The call will now be parked, and you may now replace the handset.

If your phone doesn't have dedicated call park keys, follow these steps:

1. Initiate call transfer by pressing the **Transfer** key.
2. Dial the Call Park access code **\*0** then call park orbit **1**
3. Complete the call transfer by pressing **Transfer** again.

If you have keys on your phone for parking calls these keys will indicate via a light or icon when a call is parked in that orbit.

#### 5.5.2 RETRIEVING A PARKED CALL

Depending on your phone type, there are two ways of retrieving a parked call.

1. If you have keys on your phone for parked calls, pick up the handset and press the key of the park orbit where the call is parked.
2. If you don't have dedicated call park keys lift the hand set and dial the Call Retrieve access code **\*1** followed by the park orbit number.
3. For example, to retrieve a call parked on orbit 1, you should dial **\*1** then **1**.



## 5.6 DO NOT DISTURB

If you don't want any calls to ring your phone, but instead go straight through to your voicemail, you can enable **Do Not Disturb**.

If you have a key marked **DND**, you can utilize this to toggle Do Not Disturb on and off. Or you dial \*61 to active or \*60 to disable.

You can change your status on the Dashboard as well. Follow these steps:

1. At the top right corner, click the "Available" drop down tab
2. Select "Do Not Disturb" status.

## 6. VOICEMAIL

### 6.1 3CX VOICEMAIL - HANDSET

The first time you access your voicemail box you will be asked to set up your mailbox and record your name and/or a greeting to be played by callers. A prompt will assist you to establish a pin #, set up message and record your name.

When you have one or more unheard voice messages waiting, your phone will display a flashing light.

To access your messages, log in, either by dialing the voicemail access extension **999**, or press the Messages or Voicemail key.

### 6.2 USING THE VOICEMAIL SYSTEM - HANDSET

The voicemail system is menu driven, so listen to the voice prompts and then press the keys on your phone to select which option you would like.

Once you become familiar with the system there is no need to wait until the voice prompts have played before pressing a key - you can interrupt the announcements to speed up your experience.

- Press \* to play
  - Press 0 for next message
  - Press 1 for previous message
  - Press 2 to repeat current message
  - Press 3 to delete current message
  - Press 4 to call back
  - Press 5 to forward to another voicemail
  - Press 9 for options
  - To exit press #
- Press 9 for options
  - To play messages press \*
  - To change your profile status press 1
    - Press 1 for Available
    - Press 2 for Away

- Press 3 for Out of the Office
- Press 4 for Custom Profile 1
- Press 5 for Custom Profile 2
- To dial a number press 3
- To delete all read messages press 4
  - To delete all read message press \*
  - To cancel press #
- To change your self-identification message press 5
  - To record new self-identification message press 0
  - To delete message press 1
  - To check current self-identification message press 2
  - To exit press #
- To play mailbox information press 6
- To change voicemail pin number press 7
- To change your greeting message press 8
  - To record new greeting message press 0
  - To restore standard message press 1
  - To check current greeting message press 2
  - To exit press #
- To repeat this prompt press 9
- To exit press #
- To exit press #

### 6.3 CUSTOMIZE GREETINGS ON THE HANDSET

To customize your voicemail greetings using the handset, follow these steps.

1. Dial **999** or press the Messages/Voicemail key on the handset and wait for the menu prompt
2. Press **9** for Message Options
3. To record or change your Self-Identification Message press **5**. (This message would be your name and/or title only.)
4. To record or change your Greeting Message press **8**. (This message would be the message you would like callers to hear before they left a voicemail.)
5. Select the desired option and follow the prompts to record a new message.

### 6.4 CUSTOMIZE GREETINGS ON THE DASHBOARD

To customize your voicemail greeting on the Dashboard, follow these steps.

1. Log into the Dashboard
2. On the left side, under "3CX", click "Settings" and then "Greetings"
3. From here you can record a greeting for a specific status, upload/download a greeting or play the current greeting.

## 6.5 FORWARD VOICEMAIL

To forward a voicemail to another user using the handset, follow these steps.

1. Dial **999** or press the Messages/Voicemail key on the handset and wait for the menu prompt
2. Press **\*** to listen to message
3. Press **5** to forward to another user
4. Dial Extension number to be forwarded to.

## 7. ACCESS CODES

This section lists your phone system's most commonly used access codes:

Park Call	<b>*0 + the orbit number</b>
Retrieve Parked Call	<b>*1 + the orbit number</b>
Do Not Disturb Activation	<b>*61</b>
Do Not Disturb Deactivation	<b>*60</b>
Transfer to an Extensions Voicemail	<b>*4 + extension number</b>
Change Profile Status	<b>*3</b>
Log Extension in to Queues	<b>*62</b>
Log Extension out of Queues	<b>*63</b>
Paging	<b>*11</b>
Voicemail	<b>999</b>

## 8. WEB CLIENT DASHBOARD

### 8.1 LOGIN INFORMATION

The 3CX welcome email contains valuable information about your extension including how to access the Web Client Dashboard.

#### Sample Email

Hi Ext 1234,

Welcome to 3CX!

#### Your 3CX Extension

1. Your extension number is "**1234**"
2. Your voice mail PIN is "**0000**"
3. You can retrieve your voice mail by dialing "**999**"
4. Your personal Click2Meet URL is: **<https://range.demo-us-wy.3cx.net/join/ext1234>**

#### The 3CX Web Client

Manage your phone, see presence of colleagues, chat, and web conference. To access it:

1. Go to <https://10.255.8.13:5001/webclient> if in the office or <https://range.demo.wy.3cx.us:5001/webclient> when out of the office.
2. Login using 1234
3. With password J45F5tmOa3

Use the [Chrome](#) or [Firefox](#) Plugin to call numbers from any webpage or CRM.

#### Get your 3CX App and make calls from anywhere

Don't pay for your work calls, install the app on your phone or laptop.

1. [iOS](#)
2. [Android](#)

If you prefer to use your laptop, you can install the [Windows](#) or [Mac](#) softphone.

#### Got Questions?

Start off on the right track by reading our [User Manual](#) to quickly get your bearings with 3CX.

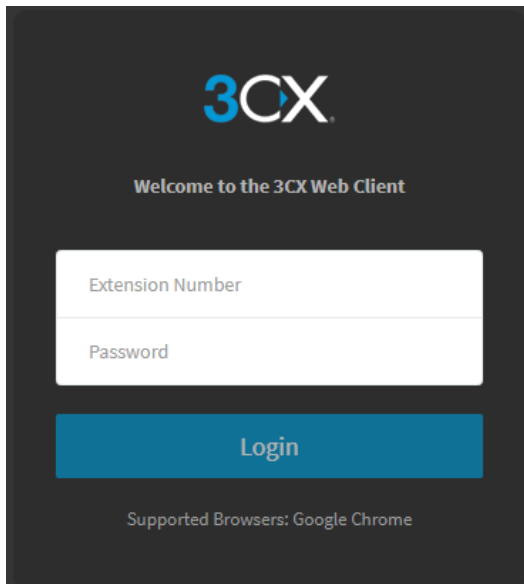
## 8.2 DASHBOARD LOGIN

To access the dashboard, use the link from the welcome email based on your location.

**EXAMPLE** – In the office: <https://10.255.8.13:5001/webclient>

**EXAMPLE** – Outside of the office: <https://range.demo.wy.3cx.us:5001/webclient>

Enter the extension number and password from the welcome email. The password is case sensitive, and it may be easier to copy and paste straight from the email.\*

The image shows the login interface for the 3CX Web Client. It features a dark grey background with the 3CX logo at the top. Below the logo, the text "Welcome to the 3CX Web Client" is displayed. There are two input fields: "Extension Number" and "Password". Below these fields is a blue "Login" button. At the bottom, it says "Supported Browsers: Google Chrome".

3CX

Welcome to the 3CX Web Client

Extension Number

Password

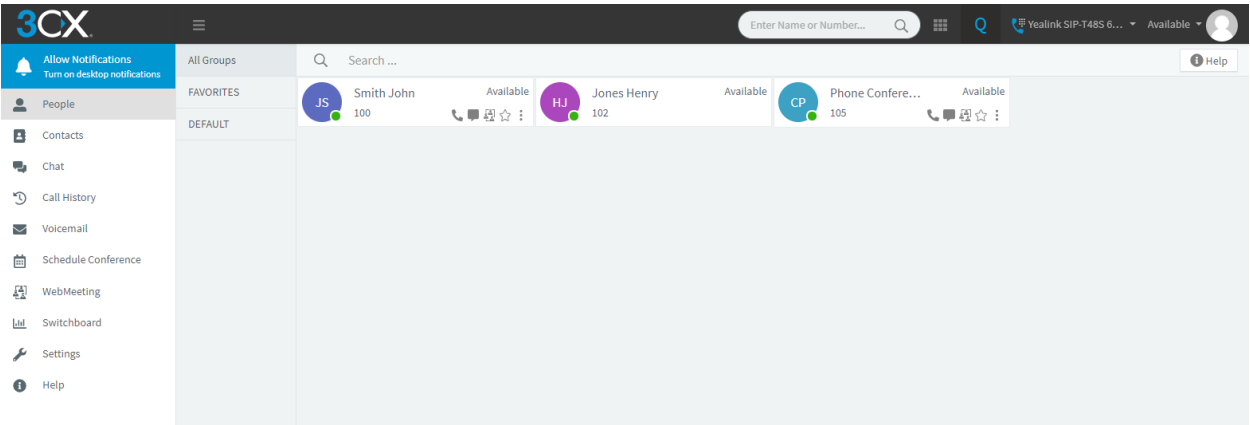
Login

Supported Browsers: Google Chrome

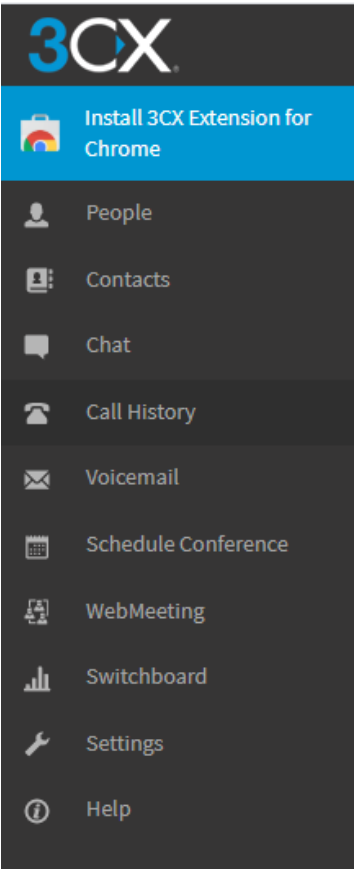
\*If there are 3 failed attempts to login, the IP of your device will be blacklisted on the system to prevent fraud and hacking attempts. If this happens, contact Range or your phone system Admin to unblock the IP address.

# 8.3 DASHBOARD BREAKDOWN

Web Client Main Screen example.

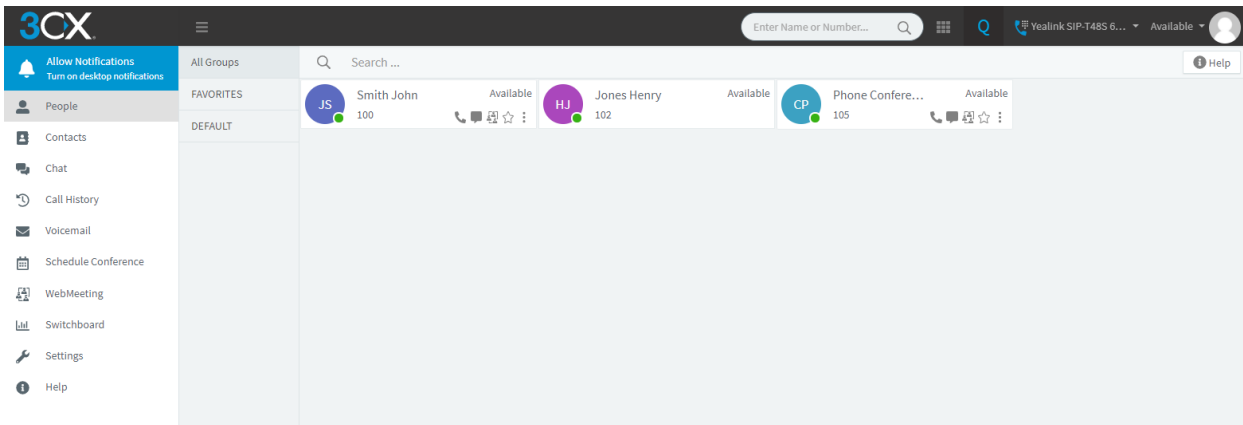


Left Side Extension Menu

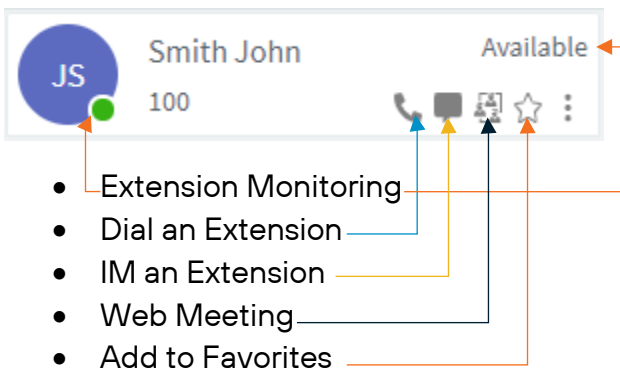


## 8.4 PEOPLE

Within the left navigation, the **People** tab shows all the extensions in the system.



Next to each extension are feature icons.



### Extension Monitoring Statuses

- Line available
- Line in use
- Do Not Disturb
- Away

## 8.5 CONTACTS

Within the left navigation, the **Contacts** tab, opens the **All Contacts** tab. However, contacts can be organized by **Company** and **Personal**. Contacts added to **Company** show on all extensions.

The screenshots illustrate the 3CX web interface for managing contacts. The interface includes a left navigation menu with options: People, Contacts, Chat, Call History, Voicemail, Schedule Conference, WebMeeting, Switchboard, Settings, and Help. The main content area displays a list of contacts, organized by 'All contacts', 'Company', or 'Personal'. The 'Company' view shows contacts associated with the company, while the 'Personal' view shows contacts associated with the user's personal account. Arrows indicate the flow from 'All contacts' to 'Company' and then to 'Personal'.

**Screenshot 1: All contacts view**

Category	Contact Name	Phone Number
Company	Doe John	3075550123
Company	Range- Dubois	3074552341
Company	Range- Forsyth	4063472226
Company	Range- Sheridan	3076730910
Personal	Range- Worland	3076750915

**Screenshot 2: Company view**

Contact Name	Phone Number
Range- Dubois	3074552341
Range- Forsyth	4063472226
Range- Sheridan	3076730910
Range- Worland	3076750915

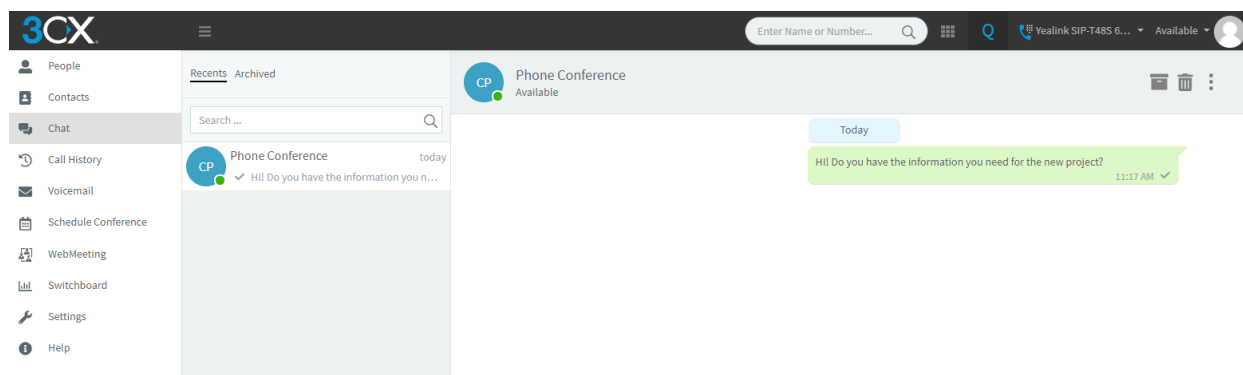
**Screenshot 3: Personal view**

Contact Name	Phone Number
Doe John	3075550123



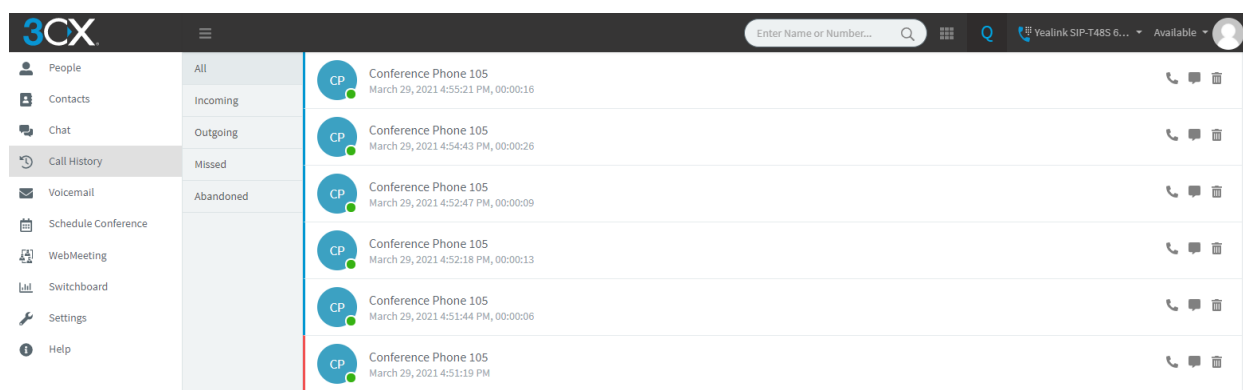
## 8.6 CHAT

Within the left navigation, the **Chat** tab, is an instant messaging feature is built into the system. You can IM any extension in the system via the Web Client.

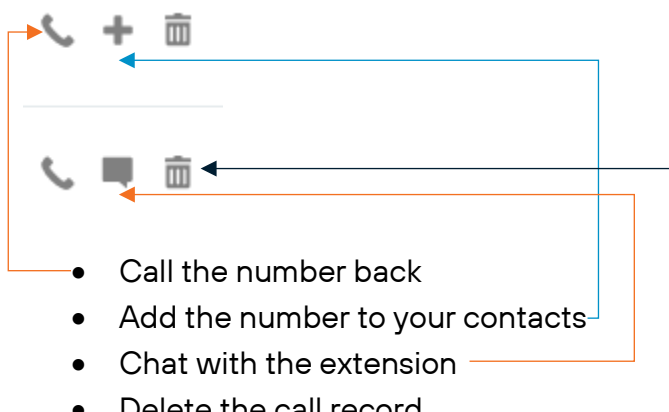


## 8.7 CALL HISTORY

Within the left navigation, the **Call History** tab there is a list of the extension's calls. The call log can be filtered by incoming, outgoing, missed, or abandoned.

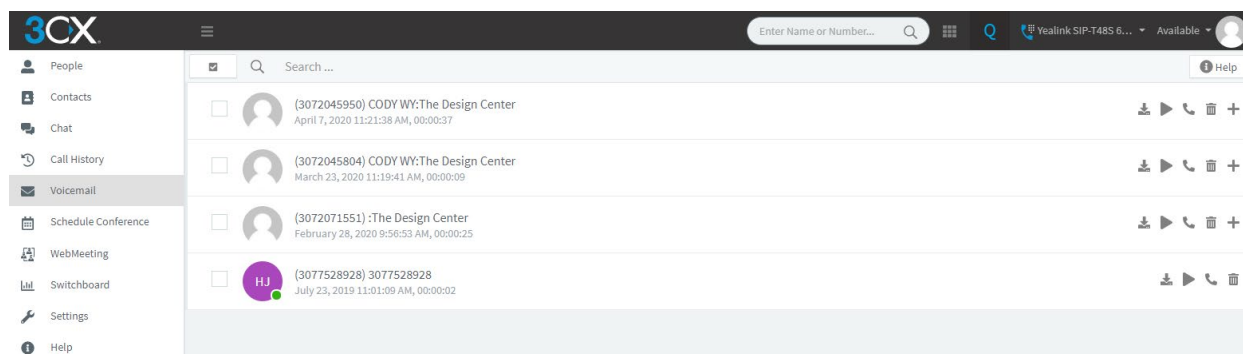


On the **Call History** screen, there are feature icons along the right side of the screen.

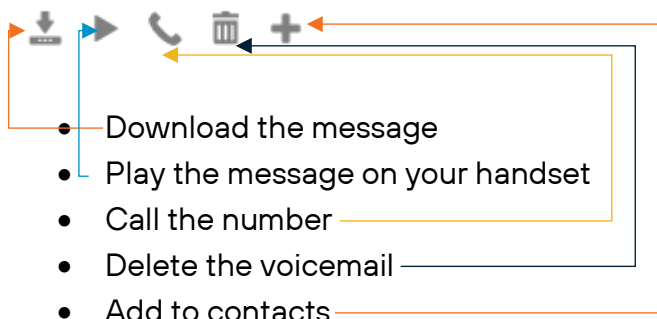


## 8.8 VOICEMAIL

Within the left navigation, the **Voicemail** tab logs and saves all voicemails of the extension. Call information is given as well.

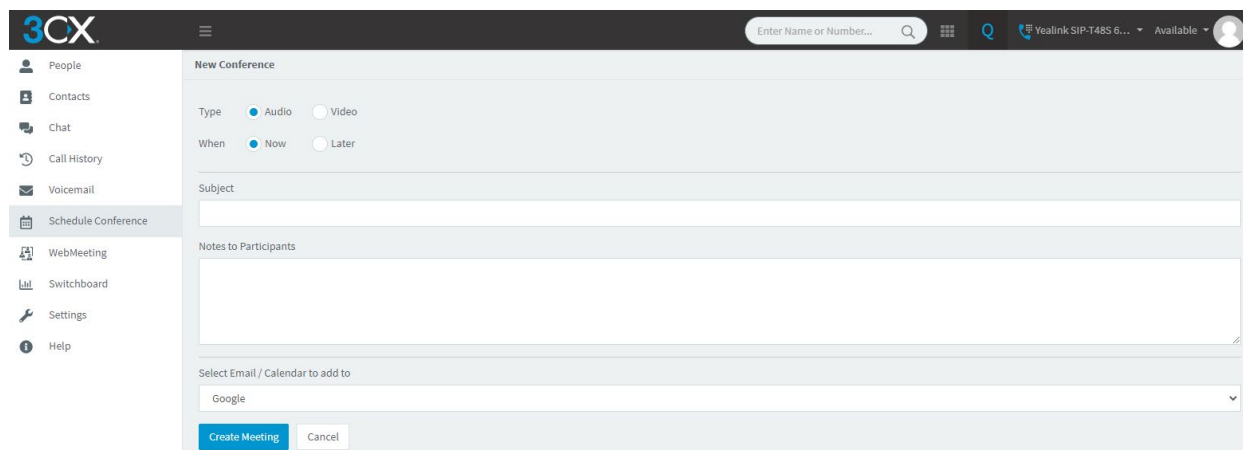


The **Voicemail** screen has feature icons along the right side of the screen:



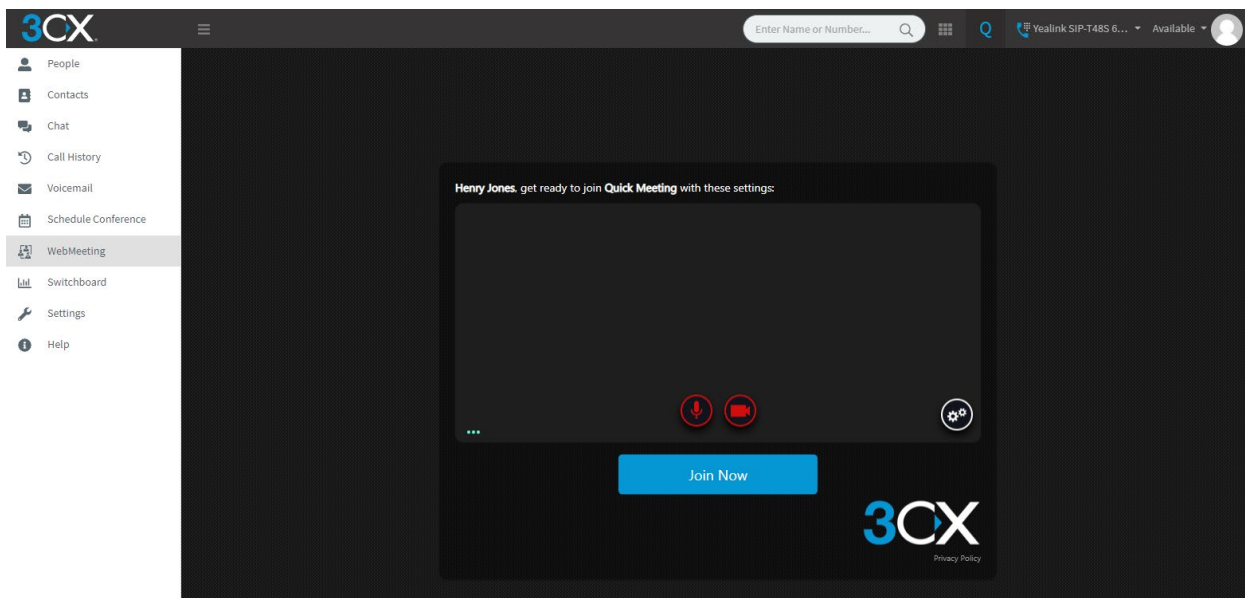
## 8.9 SCHEDULE CONFERENCE

Within the left navigation, the **Schedule Conference** tab is used to schedule a conference call. *(For internal use only, unless specified otherwise.)*



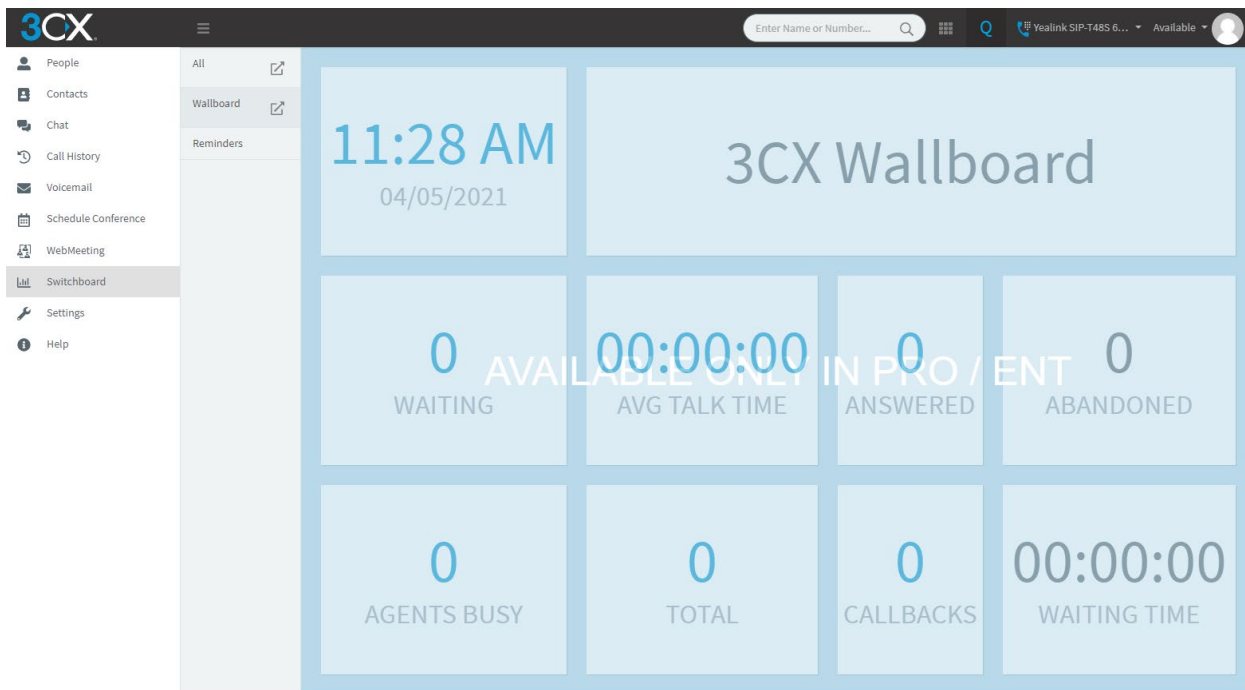
## 8.10 WEBMEETING

Within the left navigation, the **WebMeeting** tab gives the ability to have a web meeting with those in or outside of the system.



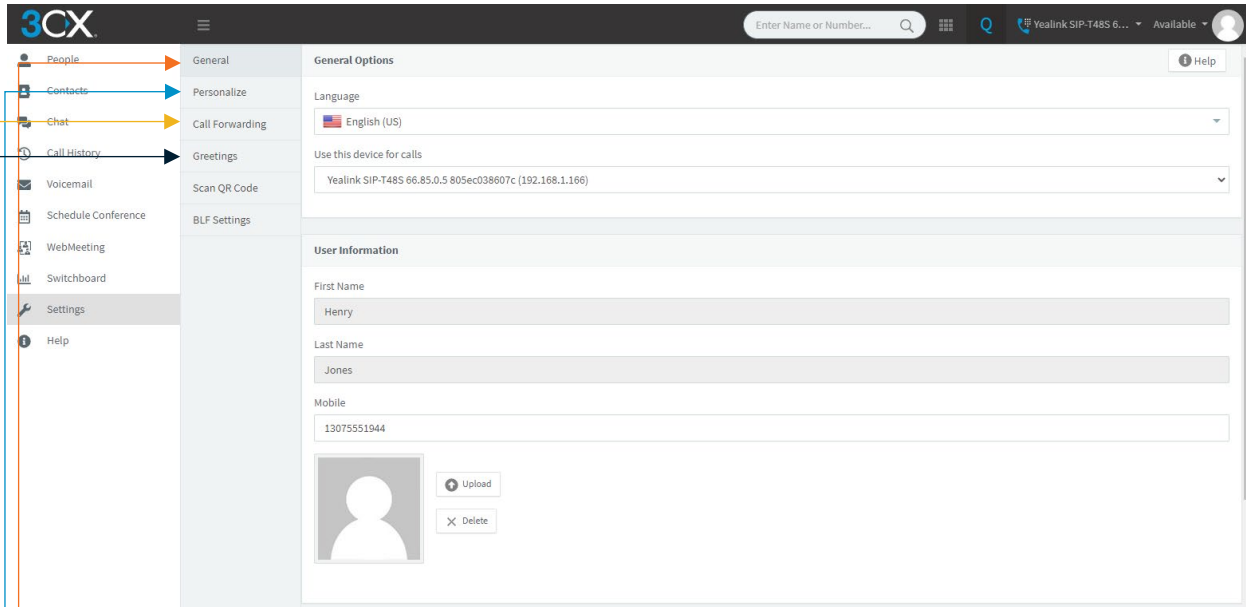
## 8.11 SWITCHBOARD

If the system has a call queue provisioned, the **Switchboard** tab provides call demographics for the group.



## 8.12 SETTINGS

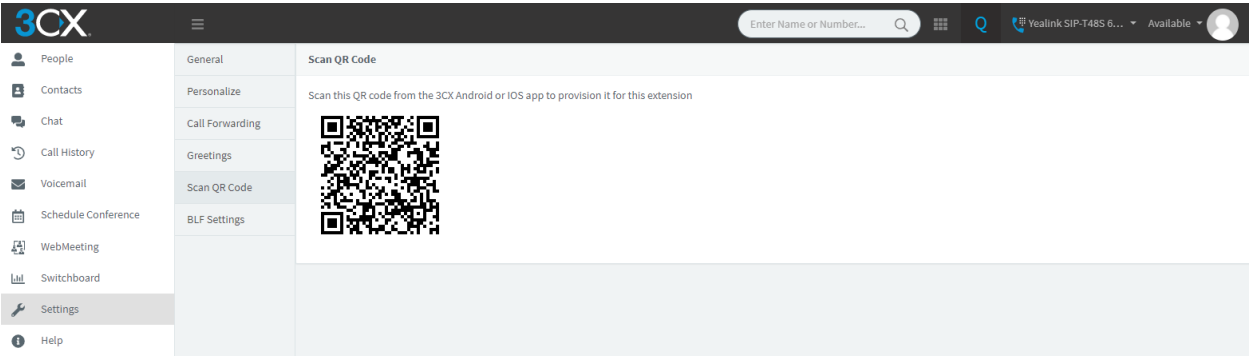
Within the left navigation, the **Settings** tab is where the extension can be customized.



- General- General contact and extension information
- Personalize
  - Status View - How extensions are displayed on Presence and Switchboard screens
  - Group Presence - Which groups you would like displayed on Presence and Switchboard screens
  - Active Calls - Types of calls to see in the Active Calls Section
  - Queues - Select the queues you would like to monitor
  - Wallboard - Status view for call queues
  - Audio/Video (information)
- Call Forwarding
  - Available - How calls are routed if you are available, but don't answer, or using the line.
  - Away - If your status is away how calls should be routed
  - Do Not Disturb - Where calls should be forwarded to
  - Lunch - How you would like calls routed if calls are unanswered or line is busy.
  - Business Trip - Where calls should be forwarded to
  - Exceptions - Used to add extensions to the call forwarding rules
- Greetings
  - Recording and setting up greetings can be completed on this tab
  - Different greetings are available for each call forwarding status.

# 8.14 QR CODE

With the 3CX app, an extension can be tied to another device like a cell phone and the QR code is how the extension and device is synced.



## 8.15 BLF SETTINGS

BLF “Busy Lamp Fields” are speed dials for the handset via soft keys on the touch screen. To customize the BLFs, select **BLF Settings** under **Settings**.

Slot	Type	Value	Action
1	BLF	100 Smith John	X
2	BLF	105 Phone Conference	X
3	Custom Speed Dial	*4100	X
4	Shared Parking	SP1	X
5	Blank		X
6	Blank		X
7	Blank		X
8	Blank		X
9	Blank		X
10	Blank		X

- Soft Key Options

- Blank
- Line
- BLF
- Speed Dial
- Custom Speed Dial
- Shared Parking
- Agent Login/Logout
- Change Status
- Blank

- *Line* - If you would like a soft key with your extension to pick up a line.
- *BLF* - A monitoring extension speed dial.
- *Speed Dial* - Like a BLF but no monitoring of the extension.
- *Custom Speed Dial* - To create a speed dial for an external number or a \* code option
- *Shared Parking* - Shared Parking is a hold for the phone system and this is to create a speed dial for the parking orbit(s).
- *Agent Login/Logout* - For systems who have call queues a speed dial can be created to log in or out of a call queue.
- *Change Status* - This speed dial can change the status of an extension to Available, Away, Do Not Disturb, Lunch, or Business Trip.

## 8.16 HOW TO MAKE EXTENSION STATUS CHANGES

For those who have the 3CX app on another device, any time a call comes into an extension all devices connected to the extension will ring. To determine when an extension will ring, change the extension's status via the Webclient or the 3CX app.

### 8.16.1 USING THE DASHBOARD TO MAKE STATUS CHANGES

- Under the **Settings** tab, select the **Call Forwarding** tab, there are five status types for the extension: Available, Away, Do Not Disturb, Lunch, and Business Trip.
  - Lunch and Business Trip are customizable and may be different if it has been changed.

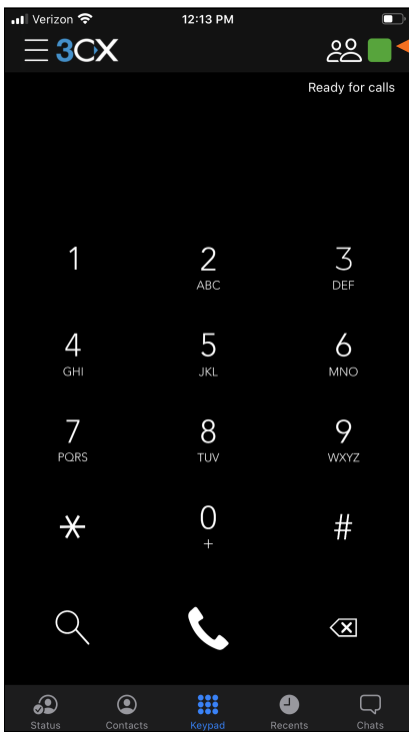
The screenshot shows the 3CX Webclient interface. On the left is a sidebar with navigation options: People, Contacts, Chat, Call History, Voicemail, Schedule Conference, WebMeeting, Switchboard, Settings (highlighted), and Help. The main area is divided into three columns: 'General', 'Available', and 'Available'. The 'Available' column is active, showing settings for the 'Available' status. It includes a 'Custom status message' field, 'Unanswered Calls' settings (No Answer Timeout: 20 seconds, Forward External Calls to: Voicemail, Forward Internal Calls to: Voicemail), 'Busy or Not Registered' settings (Forward External Calls to: Voicemail, Forward Internal Calls to: Voicemail), and 'General Options' (Also Ring my Mobile, Accept Multiple Calls, Accept Push Notifications).

- Within each status type, you can personalize an incoming call flow. The default for each type is to send an incoming call to voicemail.
- To personalize, select the desired status from the middle navigation column and select or insert the information.
- For example: Away Status

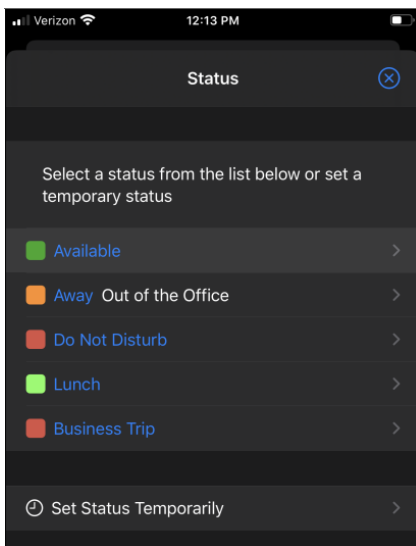
The screenshot shows the 3CX Webclient interface with the 'Away' status settings selected. The 'Away' column is active, showing settings for the 'Away' status. It includes a 'Custom status message' field with the text 'Out of the Office', 'Forward Internal Calls to:' settings (Extension Number: 100 Smith John, Voicemail, Out of Office hours Voicemail), 'Forward External Calls to:' settings (External number: 3075550219, Rebound, Use Call Deflection (302), Out of Office hours Voicemail), and 'General Options' (Accept Push Notifications).

### 8.16.2 USING THE APP TO MAKE STATUS CHANGES

- In the 3CX App, press the square on the top right of the screen, this is the extension's status indicator.



- Then select the status option you would like to change the extension to.



\*The status default for call flow is to send calls straight to voicemail. If you want this to be changed, you must make the changes on the dashboard.