RANGE

3CX PBX
END USER QUICK START GUIDE

Updated April 2022

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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.

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 "Three-Dots", then "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.
   To conference more than 3 people see section 8.10

5.5 CALL PARKING

5.5.1 PARKING A CALL

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 handset 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:

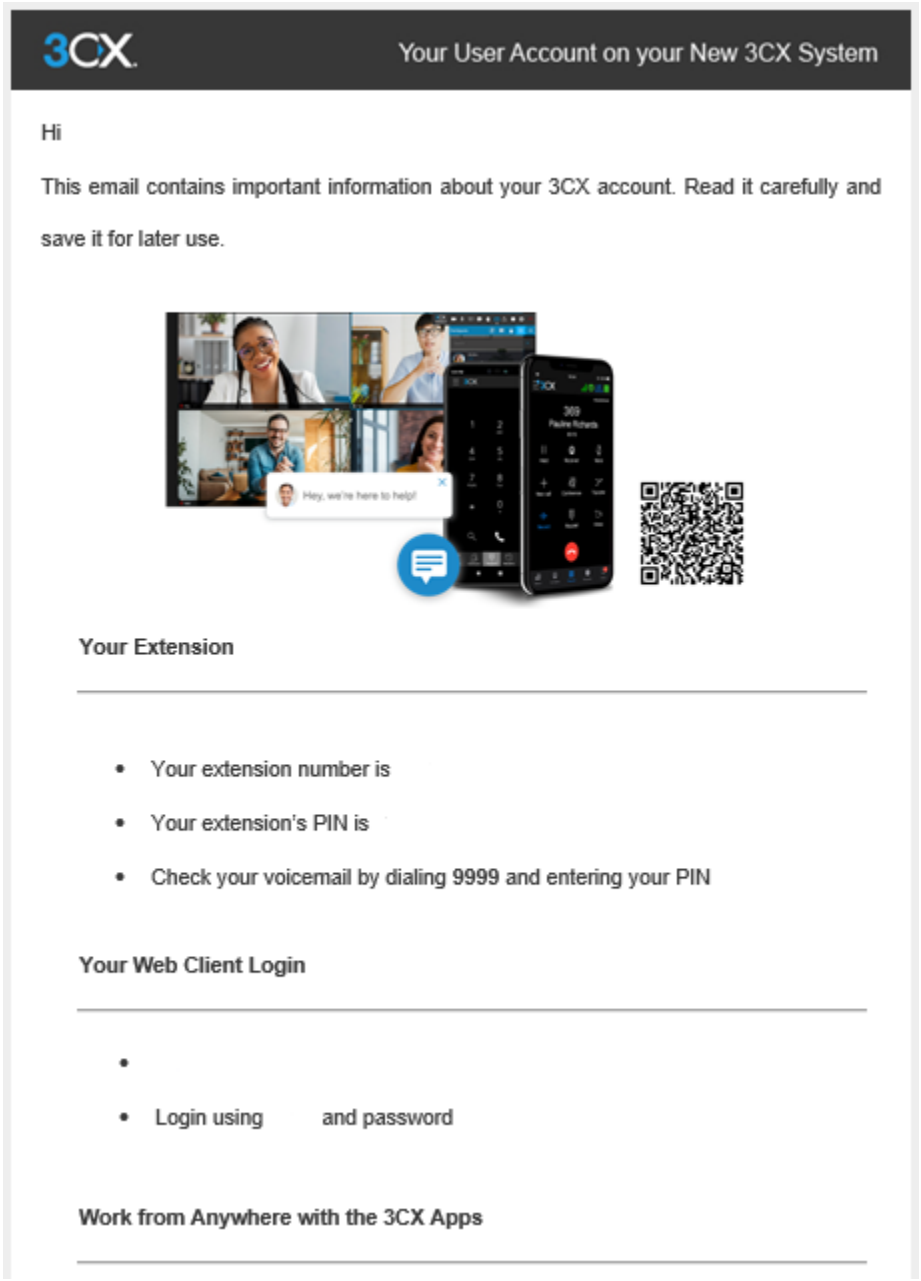
Park Call	*0 + the orbit number (usually 1 or 2)
Retrieve Parked Call	*1 + the orbit number (usually 1 or 2)
Do Not Disturb Activation	*61
Do Not Disturb Deactivation	*60
Transfer to an Extensions Voicemail	*4 + extension number
Change Profile Status	*3
Log Extension in to Queues	*62
Log Extension out of Queues	*63
Paging	*11
Voicemail	999

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



3CX Your User Account on your New 3CX System

Hi

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

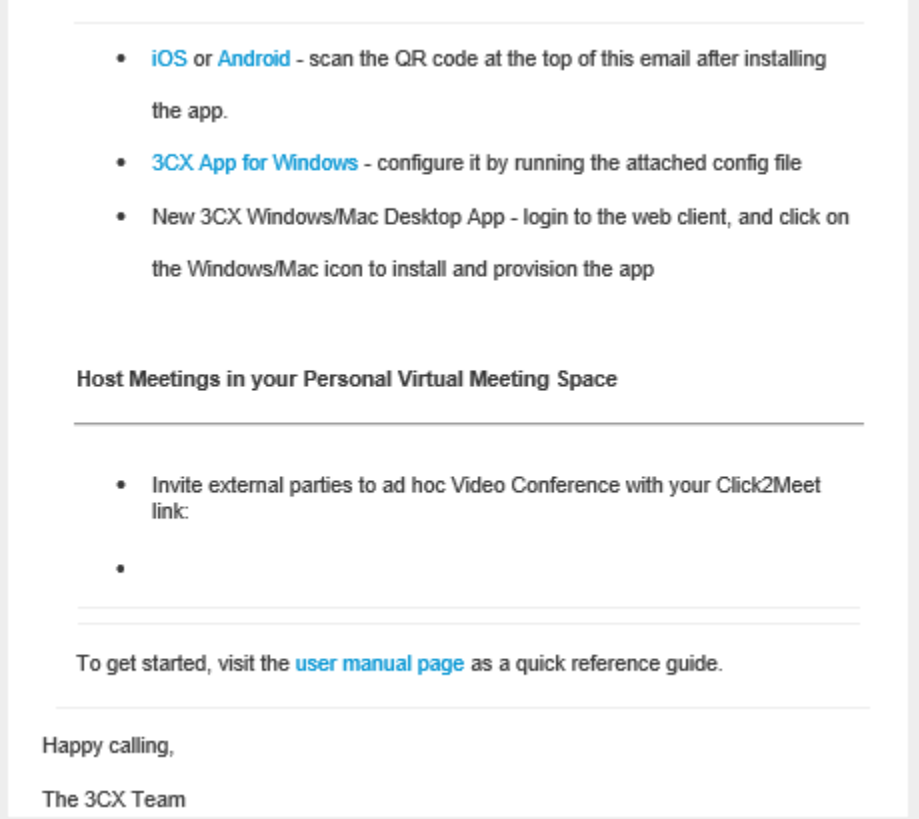
Your Extension

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

Your Web Client Login

-
- Login using and password

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:
-

To get started, visit the user manual page as a quick reference guide.

Happy calling,

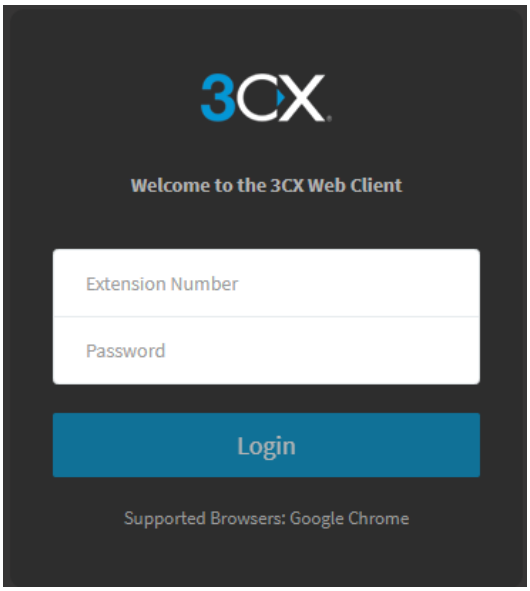
The 3CX Team

8.2 DASHBOARD LOGIN

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

EXAMPLE https://range.demo.wy.3cx.us:5001/webclient

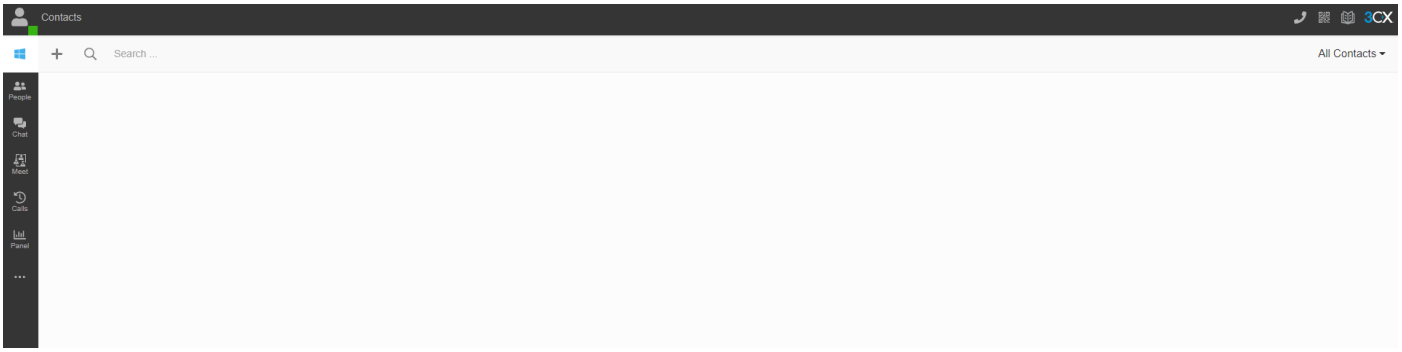
Enter the extension number and password from the welcome email. The password is case sensitive, and it may be easier to copy and paste straight from the email.*



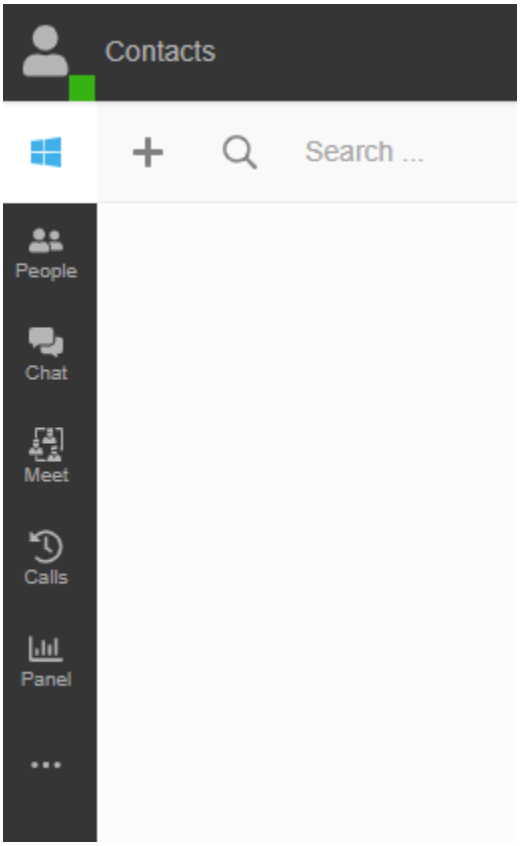
**If there are 3 failed attempts to login, the IP of your device will be blacklisted on the system to prevent fraud and hacking attempts. If this happens, contact Range or your phone system Admin to unblock the IP address.*

8.3 DASHBOARD BREAKDOWN

Web Client Main Screen example.

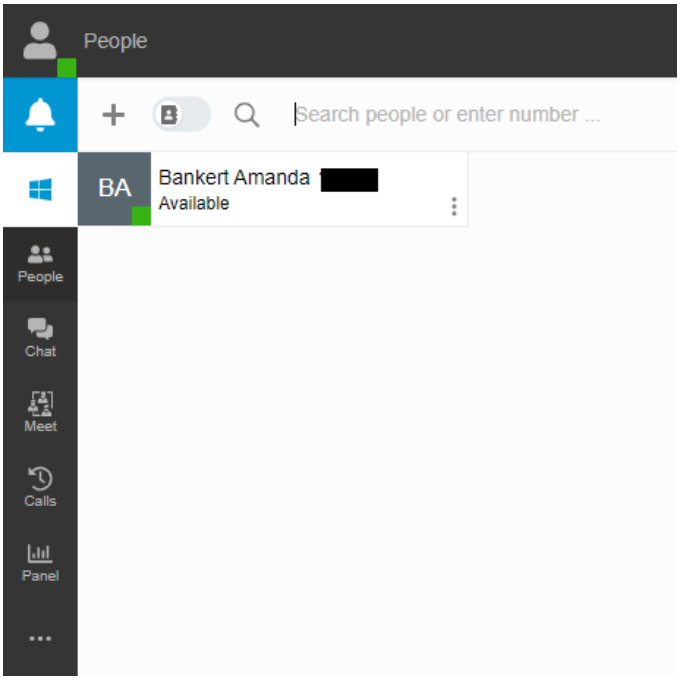


Left Side Extension Menu

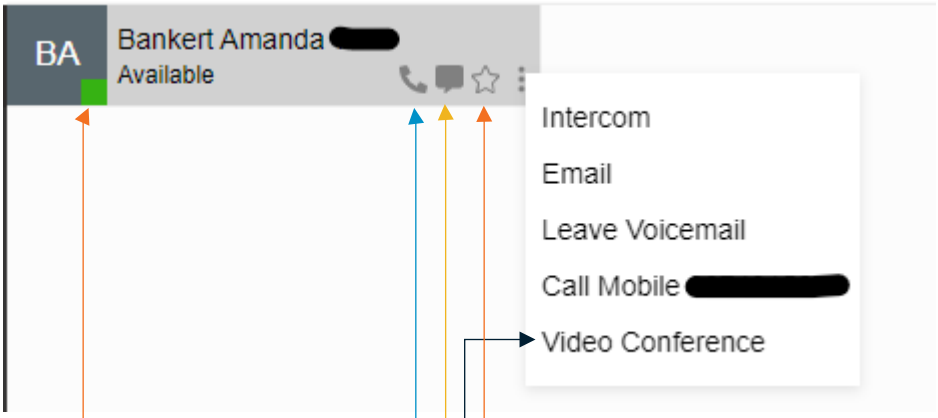


8.4 PEOPLE

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



Next to each extension are feature icons.



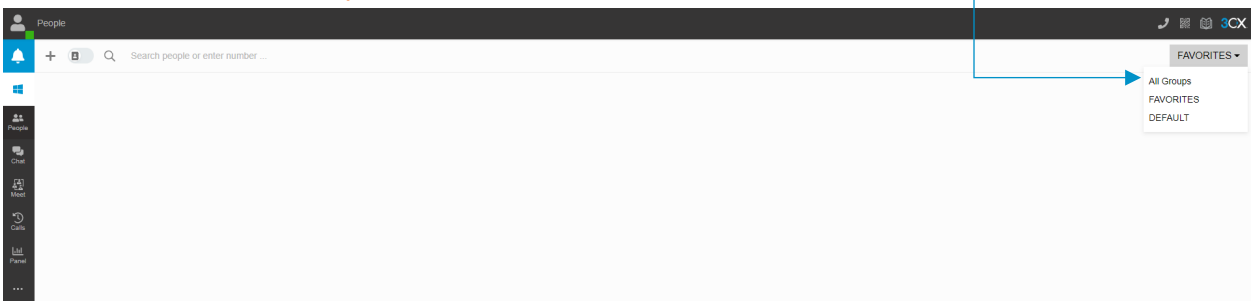
- Extension Monitoring
- Dial an Extension
- IM an Extension
- Web Meeting
- Add to Favorites

Extension Monitoring Statuses

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

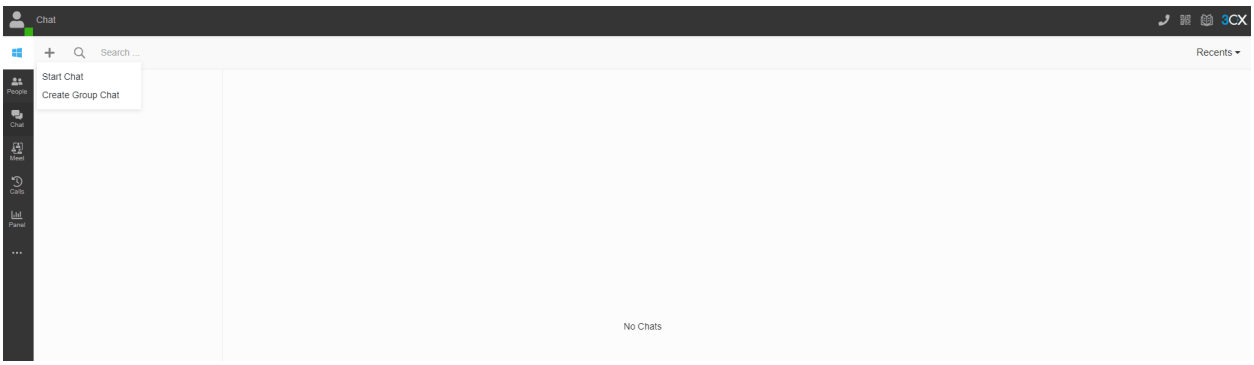
8.5 CONTACTS

Within the left navigation, the People tab, opens the All Contacts tab. However, on the right you can filter Favorites and Groups.



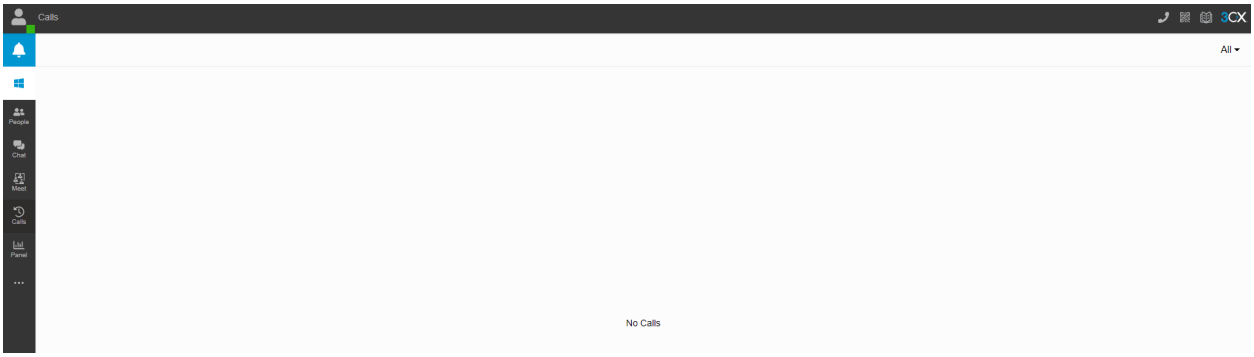
8.6 CHAT

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.

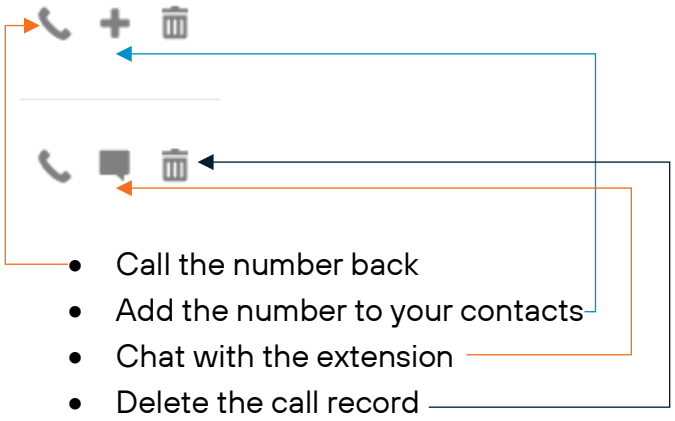


8.7 CALL HISTORY

Within the left navigation, the Calls tab there is a list of the extension's calls.



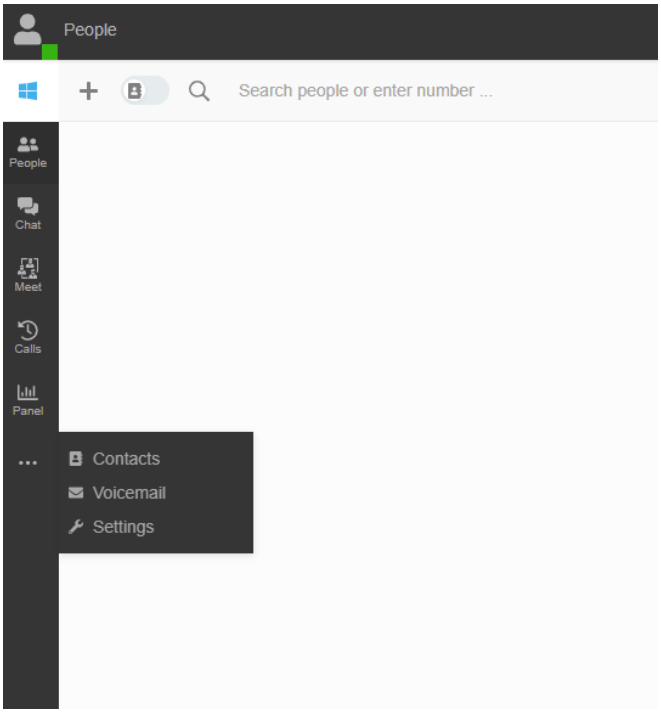
On the Calls screen, there are feature icons along the right side of the screen of each call.



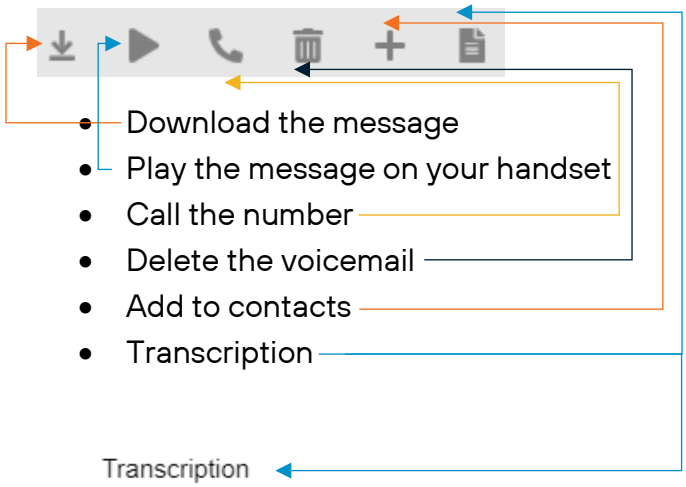
- Call the number back
- Add the number to your contacts
- Chat with the extension
- Delete the call record

8.8 VOICEMAIL

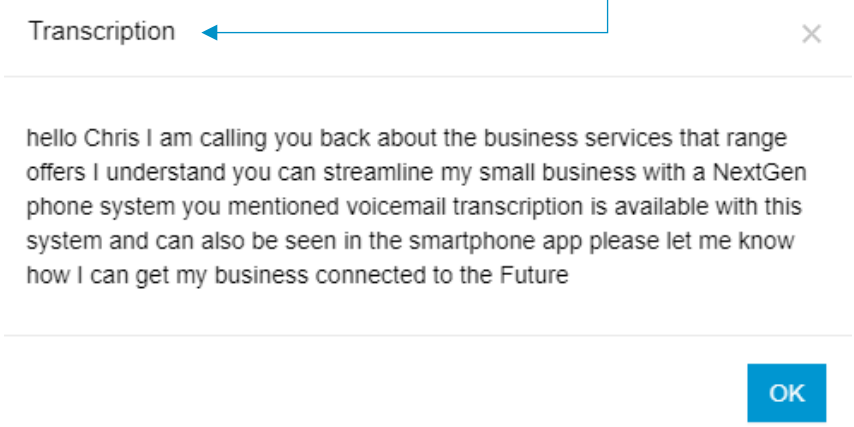
Within the left navigation, the Voicemail tab logs and saves all voicemails of the extension. Call information is given as well.



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

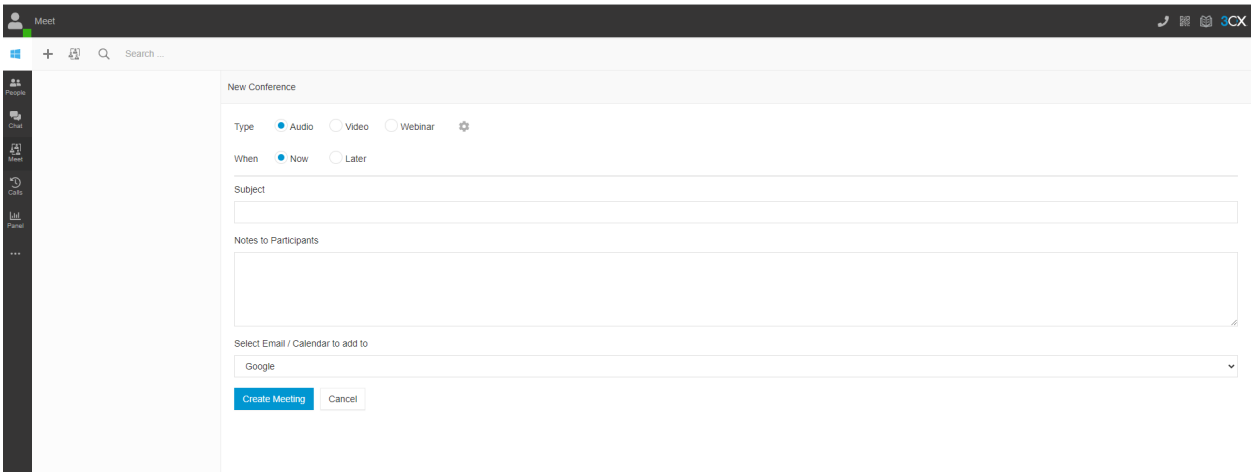


- Download the message
- Play the message on your handset
- Call the number
- Delete the voicemail
- Add to contacts
- Transcription



8.9 MEET

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



8.9.1 CONFERENCE CALLING

Setting up a conference call for more than 3 people can be done in two ways.
(For 3-way conferencing see section 5.4)

You can create a conference call by either dialing the conference number directly from your phone or by using the 3CX software installed on your PC.

8.9.2 CREATING A CONFERENCE CALL FROM YOUR PHONE

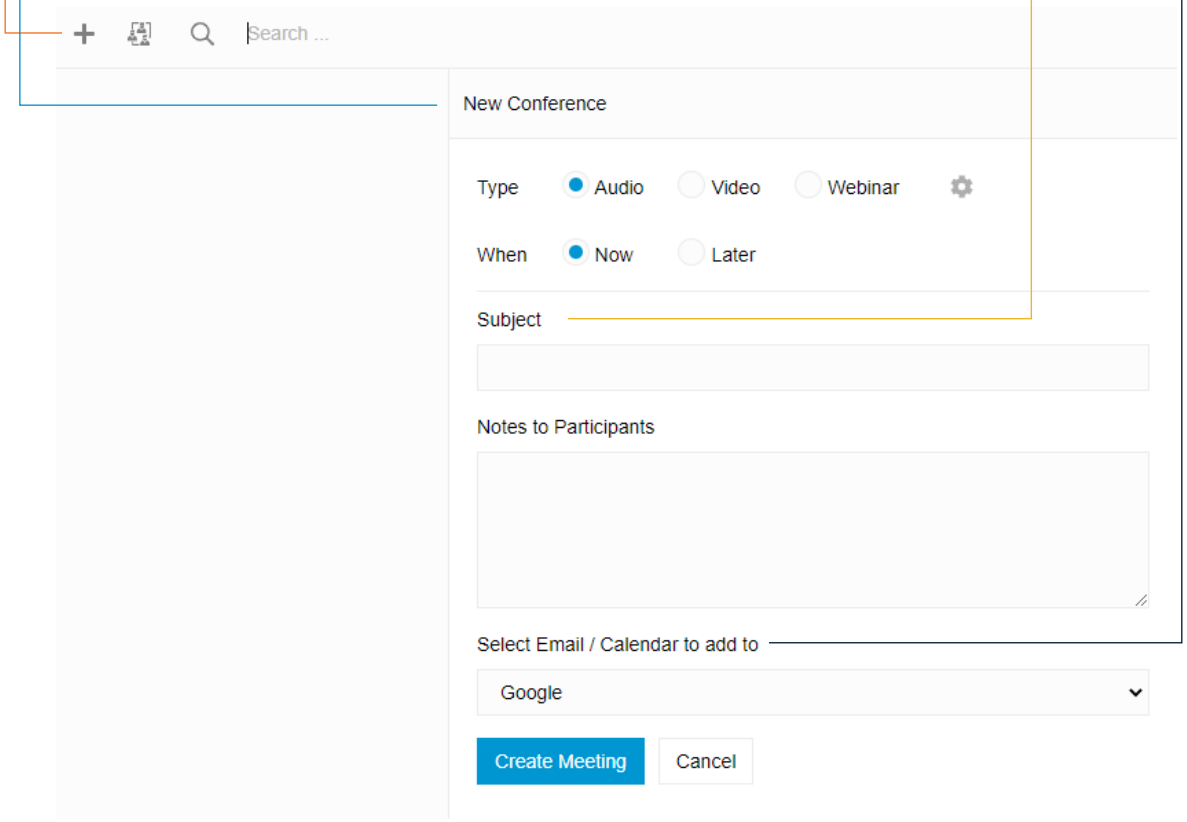
If you wish to setup a conference directly from your phone, you will need to inform the other participants of the number they need to dial and the conference ID. For example, internal callers will need to dial 700 but external participants will need to dial a specific DID or else dial 700 at the Auto-Attendant menu. After that they need to enter the conference ID that was provided.

1. Obtain the audio-conferencing pin number.
2. Dial the conference extension number, by default this is 700 for a 3-digit extension system, or 7000 for a 4-digit extension system.
3. You will be requested to enter a conference ID. This can be any number, for example '100', then press *, then enter the audio-conferencing pin number, for example: 100*123456 (where 100 is the conference ID and 123456 the audio-conference PIN).
4. You will be entered into the conference at this point.
5. All callers that wish to join the conference must specify the same conference ID.
6. If you are the first participant, the conference system will ask you to confirm creation of the conference. Press * to confirm or # to cancel.

8.9.3 CREATING A NEW CONFERENCE CALL FROM OUR PC

(If outside callers are desired a DID or Auto-Attendant option will need to be configured by your system administrator.)

1. In the Meet tab, click on the + button. (in the upper left)
2. The New Conference dialog will appear.
3. Specify a Subject for the conference.
4. Select Email/Calendar to add to. i.e. Google, Outlook 365, .ics ...
5. Send email to all desired participants.

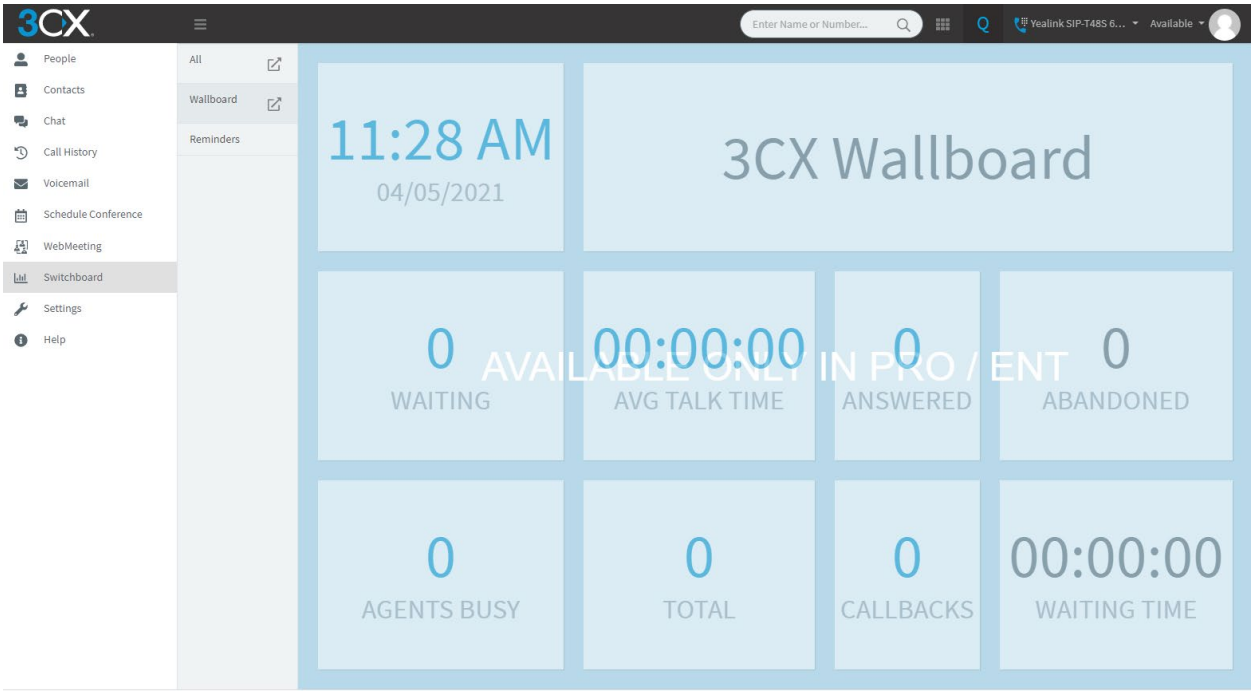


8.9.4 TO JOIN AN AUDIO CONFERENCE

For participants to join, they will need to dial 700 for a 3-digit extension system, or 7000 for a 4-digit extension system, and enter the pin number provided in the email or from the organizer. If an outside DID has been configured for your system, this can be used by an outside caller.

8.10 SWITCHBOARD

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



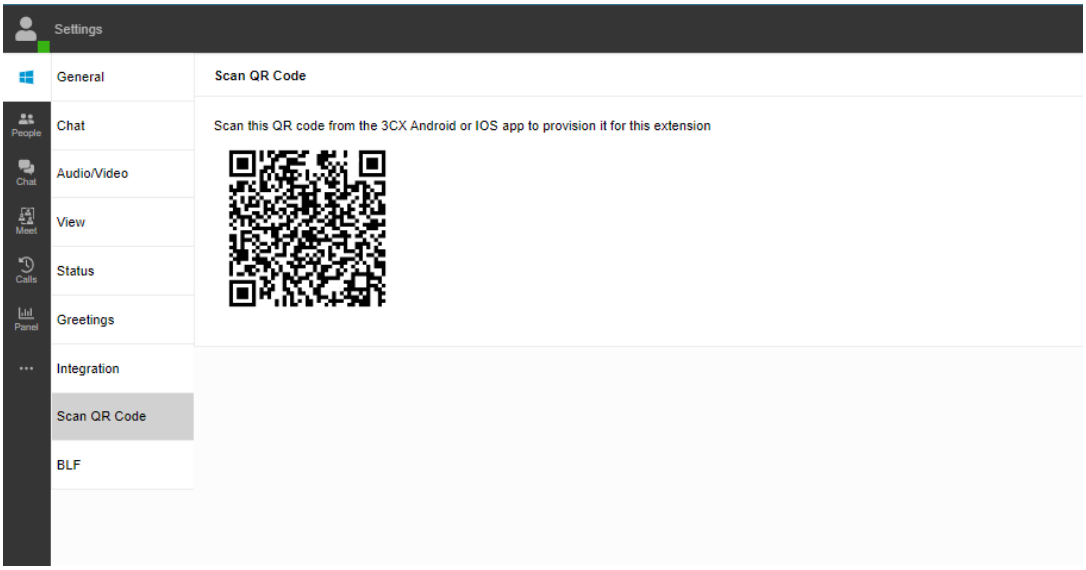
8.11 SETTINGS

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

- General – General contact and extension information
  - Avatar Picture
  - Mobile number
  - Change password
- Chat – Notification settings
- Audio/Video
  - Use this device for calls – Change this to control desk phone or web client
  - Ringer – Change this to control how the web client rings your computer
  - Audio/Video – Change this to select a connected headset.
- View – Changes extensions shown and how sorted
- Status
  - See Section 8.15
- Greetings
  - Recording and setting up greetings can be completed on this tab
  - Different greetings are available for each call forwarding status.
- Hot Keys – *Specific to Desktop App*
  - See Section 9

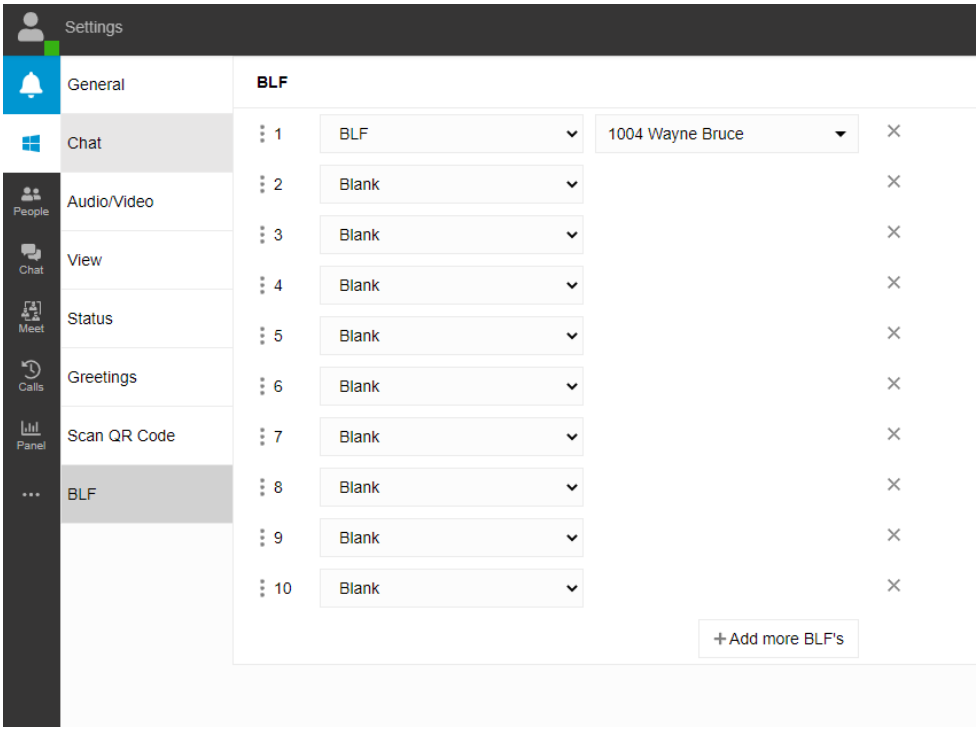
8.12 QR CODE

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

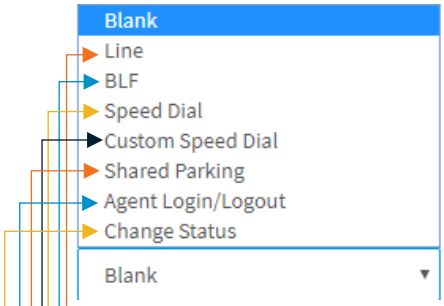


8.13 BLF SETTINGS

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



- Soft Key Options



- *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.

8.14 STATUS

There are 5 statuses available. All statuses can have custom messages applied. Please be aware all devices connected to your extension will change status. i.e. if you change your desk phone to Do Not Disturb your Smartphone app will also be changed to Do Not Disturb.

Static statuses (3) can be auto switched, based on time of day:

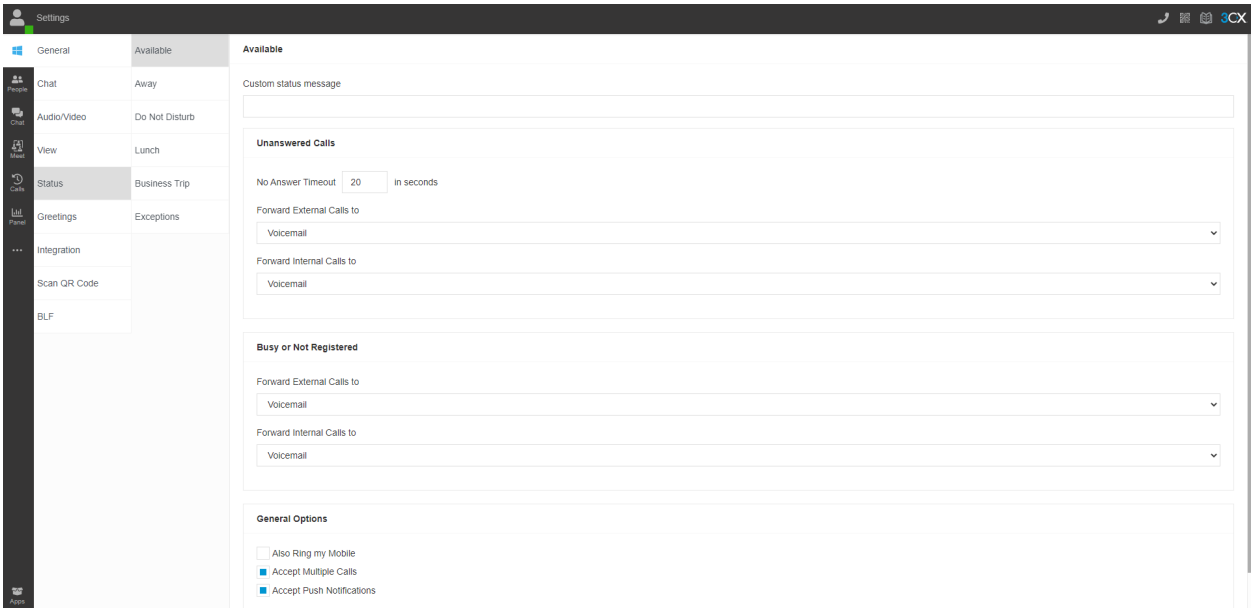
- Available
- Away
- Do Not Disturb

Customizable statuses (2) but persistent when used:

- Custom 1 (Lunch by default)
- Custom 2 (Business Trip by default)

8.14.1 USING THE DASHBOARD TO CONFIGURE STATUS

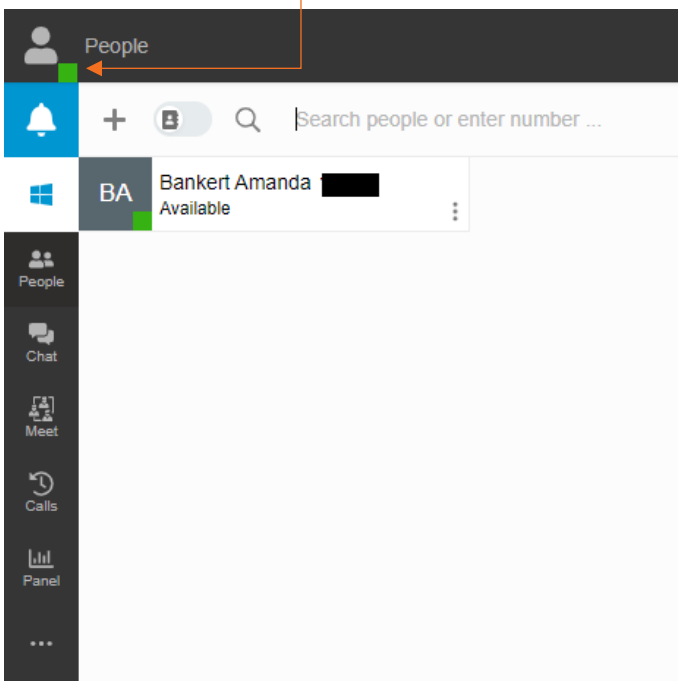
- Under the three dots, then Settings tab, select the Status tab, select the status you would like to configure.



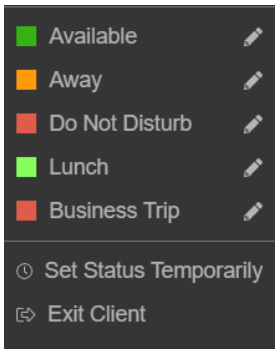
- Within each status type, you can personalize an incoming call flow. The default for each type to is send an incoming call to voicemail.
- To personalize, select the desired status from the middle navigation column and select or insert the information.

8.14.2 USING THE WEB CLIENT OR DESKTOP APP TO MAKE STATUS CHANGES

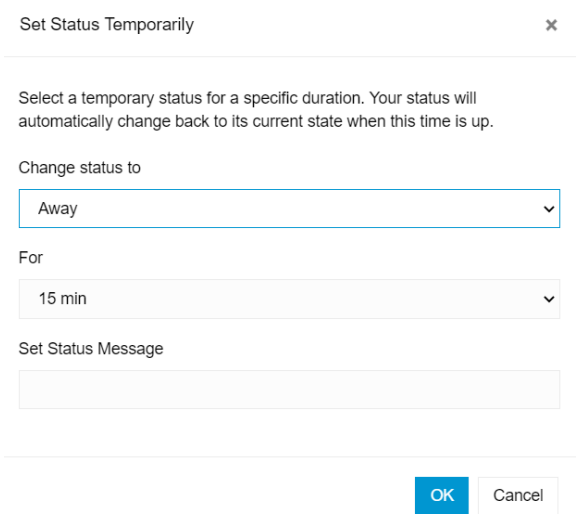
- In the 3CX App, press the square on the top left of the screen, this is the extension's status indicator.



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

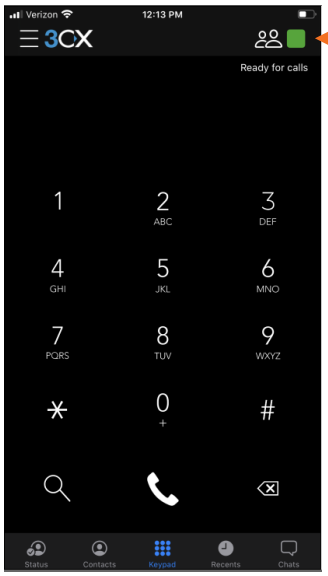


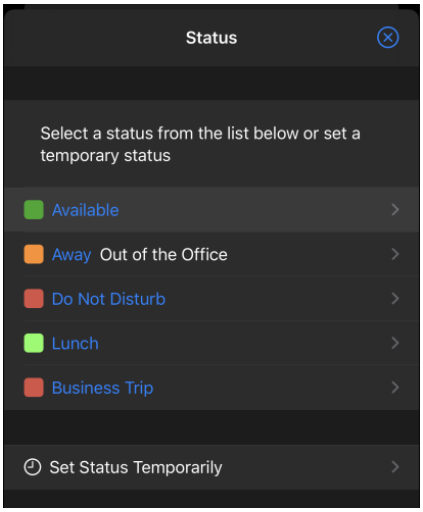
- Your status can also be changed temporarily, with a status message.



8.14.3 USING THE SMARTPHONE APP TO MAKE STATUS CHANGES

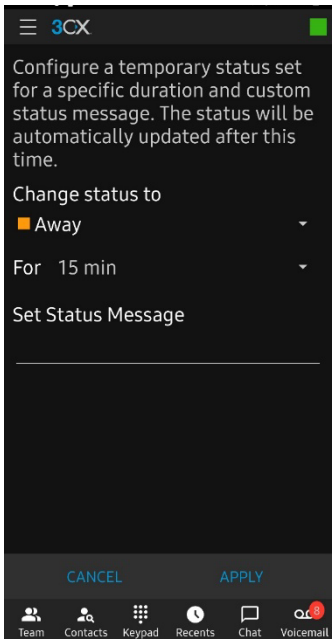
- In the 3CX Smartphone App, press the square on the top right of the screen, this is the extension's status indicator.





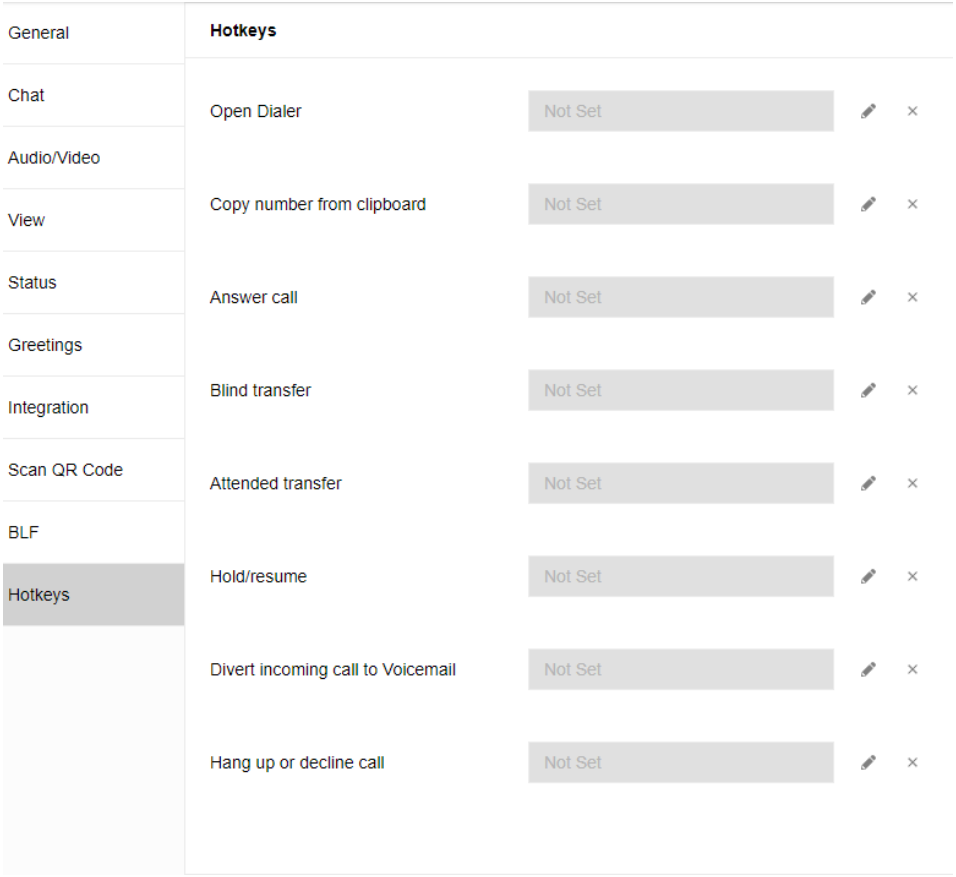
- Then select the status option you would like to change the extension to.

- Your status can also be changed temporarily, with a status message.



9. DESKTOP HOT KEYS

Within Settings on the 3CX Desktop App, there are customized Hot Keys. A Hot Key allows a combination of keys on your keyboard to perform a task when you press them all at once with the objection of reducing a series of mouse clicks in various places. You think of this like how you might copy and paste with your keyboard.



Suggested Hot Keys are:

- Open Dialer – Alt + D
- Answer Call – Alt + S
- Hang Up or Decline Call – Alt + F