



breakfree
with a software based PBX for Windows



Manual

**3CX Call Assistant & Voice mail for
3CX Phone System**

Version 3.1

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Introduction to 3CX Phone System

What is 3CX Phone System for Windows?

3CX Phone System is a software-based IP PBX that replaces a traditional PBX or phone system. 3CX Phone System sends calls as data packets over the computer data network instead of via the traditional phone network. Phones share the network with computers and separate phone wiring can therefore be eliminated.

With the use of a VOIP gateway, you can connect existing phone lines to the IP PBX and make and receive phone calls via a regular PSTN line.

Benefits to an extension user

3CX Phone System delivers numerous benefits to a user of the system:

- Easy extension management using a Windows application
- Ability to quickly view extension status
- Ability to view status of incoming lines
- Ability to view number of callers in queue
- Ability to receive your voice mail in your e-mail inbox
- View your entire call history with a few mouse-clicks
- Quickly launch missed calls
- View an automatically updated extension number list
- Transfer incoming calls to any user with a few mouse clicks

All these functions are performed using the 3CX Call Assistant, a light weight client to 3CX Phone System.

The 3CX Call Assistant

Introduction

The Call Assistant is a small windows application that allows you to manage your extension and calls from your desktop. You can see the extension numbers of other users and whether they are available to take calls. The Call Assistant application is phone-independent, enabling you to use your favourite SIP hardware or software phone.

The Call Assistant ships with all editions of 3CX Phone System, including the Free edition. However, in the Small Business, Pro and Enterprise editions, the Call Assistant allows you to transfer calls to another extension or voice mail, place calls on hold and launch calls with a few mouse-clicks. You do not need to learn complicated phone functions.

Installing the 3CX Call Assistant

The Call Assistant is a very small application (400k) and is very easy to deploy. To install it:

1. From the machine on which you wish to install the Call Assistant, go to: <http://phone-system:5481/callassistant.php>, where phone-system is the machine name of your phone system server.
2. Click on the Link 'Install 3CX Call Assistant'.
3. Click 'Run' to execute the setup process.
4. You will be prompted to select a location. The files will be copied. Click Finish to complete installation.

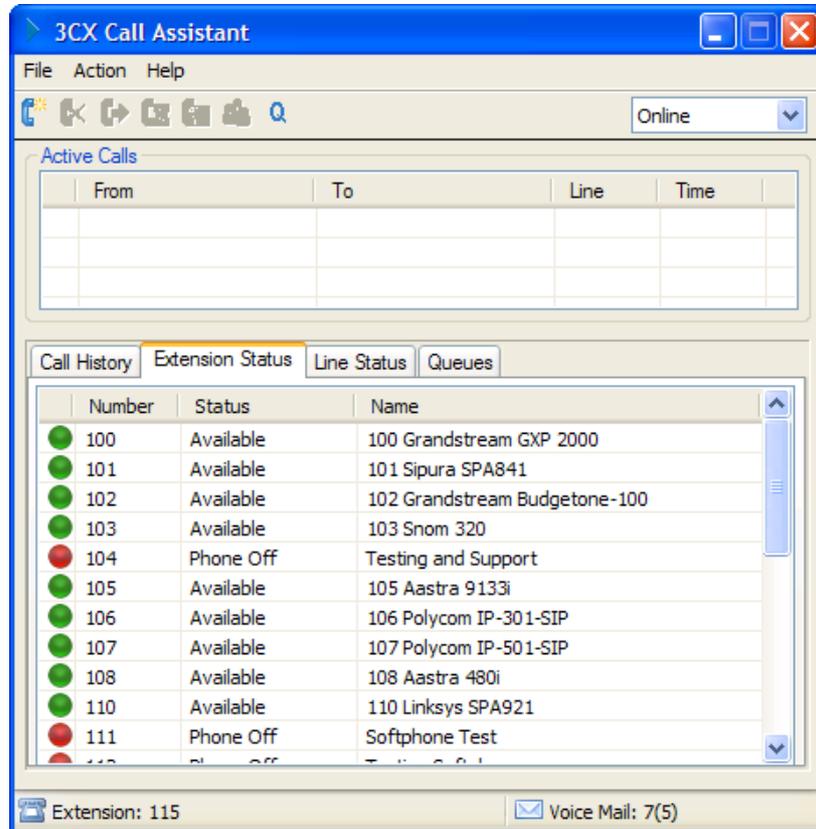
Launching 3CX Call Assistant

Note: To use the Call Assistant, voice mail must be enabled for the extension for which you want to use the Call Assistant (by default 3CX Phone System enables voice mail). You must also have your voice mail pin handy. By default, the system sets your extension number as the voice mail pin.

1. Start 3CX Call Assistant by double clicking on its tray icon. The first time you start it, you will be prompted for your extension number and Voice mail pin number. Set-up would have automatically detected the server name and inserted it for you.
2. Tick the option "Log me in automatically" so that you don't have to enter the login information each time 3CX Call Assistant starts up.
3. Tick the option "Automatically start 3CX Call Assistant when Windows starts", so that 3CX Call Assistant will automatically run in the System Tray each time Windows starts.

- Click OK to start 3CX Call Assistant. Once you have logged in successfully, your extension number will be shown in the status bar.

Using 3CX Call Assistant



Screenshot 1 - The 3CX Call Assistant

The Call Assistant interface is divided into 2 sections: A section that lists active inbound or outbound calls and a section with a number of tabs, listing Call History, Extension status, and Line status.

New Calls

As soon as a call comes in, 3CX Call Assistant will pop up a small dialog in the system tray informing you of the new call. The new call will also be shown in the “Active Calls” List. You can pick up the call as usual with your phone.

Call History

The Call History tab will show you a list of Calls that you made or received, including missed calls.

Extension Status

The extension status tab will list all extensions of the phone system, including their extension number and whether the user of the extension is available or away.

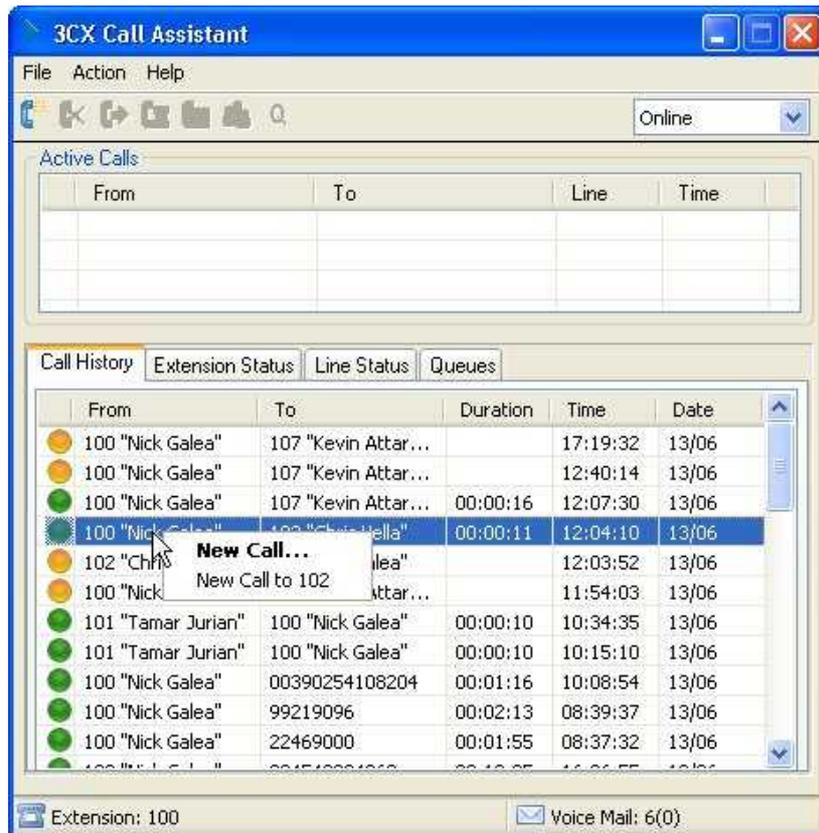
Line Status

The line status tab shows the status of all external lines.

Queues (Enterprise edition only)

The Queues tab lists all call queues present in the system and shows number of callers in the queue.

Placing a call



Screenshot 2 - Placing a call

To place a call from 3CX Call Assistant, select Action > New Call and enter the destination number. Alternatively, double-click on any phone number listed in Call History to launch a call to that number.

Transferring calls (Small Business, Pro & Enterprise versions only)

To transfer a call, selection Action > Transfer a call. Then select to which extension the call must be transferred.

Logging into a Call Queue (Enterprise edition only)

Call queues allow calls to be queued in case all agents are busy. The actual configuration of who is an agent for a particular Call Queue is done from the 3CX management console. However, if you are an agent for a queue, you need to login to the queue to

actually start taking calls. This avoids calls being sent to your extension without you being available.

To login to all Call Queues that you are a member of, click on the button “Login to Call Queue”. From that point onwards you will be routed calls as they come into the queue.

Specifying Away status

If you temporarily can not answer the phone, you can specify that you are away. This will show your colleagues that you are not in a position to answer calls, as well as route any calls that get routed to your extension according to the “Phone busy” setting configured for your extension.

To set your extension status, select “Available” or “Away” from the drop down list. Note that this setting will persist even if you shut down 3CX Call Assistant.

Call pick- up - Take calls from other extensions

If you hear a particular extension ringing, and you know that person is not able to take the call, you can take the call using the ‘Call Pickup’ feature. TO do this, type

10<extension number> followed by the send key.

This will redirect the active call to your extension.

Voice Mail

Introduction

If you are unavailable to take a call, 3CX Phone System can record a message from the caller. These messages can be heard in the following ways:

- You can have the voice mail message emailed to you as a WAV attachment which can be played by Windows media player.
- You can have a notification message emailed to you so that you can dial the voice mail system and listen to the voice mail by phone
- You can retrieve the voice mail by dialling 999 (default voice mail extension)

3CX Phone System realizes the concept of a unified messaging system, in which the user only needs to check his email inbox for email messages as well as voice mail messages.

Retrieving voice mail by phone

To retrieve your voice mail by phone:

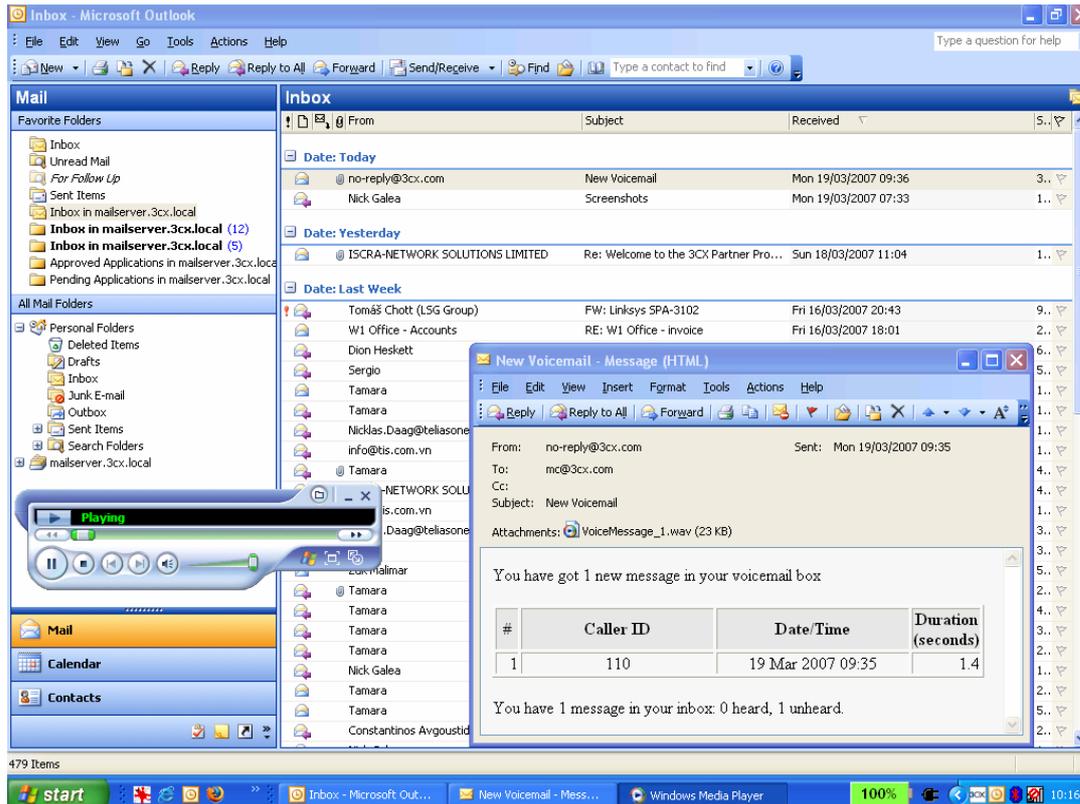
1. Dial the voice mail system extension - 999. If you are outside the company, you can dial this number from any digital receptionist menu.
2. Enter your extension number and when prompted your pin number. Press pound #
3. A prompt will be played with the number of read and unread messages in your voice mailbox.
4. Press * to play your unread messages.
5. During playback of voice mail, you have these options:
 - 0 - Skip to the next message
 - 1 - Skip to the previous message.
 - 2 - Repeat current message.
 - 3 - Delete the current message and automatically go to the next message.
 - 9 - To go to the Voice mail options menu
 - # - To hang up the call
6. Voice mail options menu

The voice mail options menu allows you to configure pin code and delete all read messages. It can be reached by entering 9 during message playback. The following options are valid:

- 4 - to delete all messages

- 6 - To play mailbox information
- 7 - To change pin number
- 8 - To change your voice mail greeting
- 9 - To repeat the prompt
- # - To exit the call

Receiving voice mail in your email inbox



Screenshot 3 - Receiving voice mail in your inbox

If your system is setup to attach the voice mail to your email, simply open up the email and double-click on the attachment. The voice mail has been attached in the wav format, so it will automatically be opened and played in media player.