

## Using 3CX phone system

3CX is a program that we use to receive incoming and make outgoing calls. It will be preinstalled on your system.

Here you can see everyone internally that is logged on to the system and what their status is.

Green: Available

Orange: Away

Yellow: On another call ■ Red: Do not disturb/Business Trip

Lime Green: Lunch

Logging/out the queue: To Log-in or logout of the queue

Click your profile at the top right of screen

Select login/out of queue

## Incoming call:

To answer incoming call – Select the green phone icon

To decline incoming call – Select the red phone icon

## Transfer a call:

Select the “Att.transfer” button on the phone (this puts your caller on hold and allows you to speak to the person you are transferring the call through to.)

Enter the number/name of the person you would like to transfer the call to

Provide a name & company name of the caller;  
If they wish to accept the call, click “Join”. The  
call will transfer.

If they do not wish to accept the call, they will  
hang up and the call will come back to you.

If they do not answer, click the red button  
and the call will come back to you.

Note: When taking a message ensure you have the callers  
name, contact details and a brief description of what the call is regarding then e-mail the relevant staff member.

Please note: Remember to use “Att.transfer” and not “transfer” as this will transfer the call without the opportunity to take a message.

To make an outgoing call:

Open 3CX

Type in the name/number you are trying to dial

Click the green phone icon

Note: When searching by name the system will search through the company’s saved contacts.

Troubleshooting.

If 3CX is not popping up when call is incoming:

On the left-hand side under contacts click the 3 circles

Click settings.

Click Audio/Video.

Click “Allow call pop-up to steal focus on incoming calls”

If your headset is not working:

On the left-hand side under contacts click the 3 circles,

Click settings

Click Audio/Video.

Check that your speaker and microphone are defaulted  to Jabra