

Gear up your PBX

Cut Costs, Boost Profits

Version 20160711

Installing the 3CX Clients



Goal of this Module

- Configuring the 3CX Client
 - Prerequisites
 - Concepts of
 - Softphone
 - Provisioning
 - Welcome E-Mail Provisioning
 - Assigning a 3CX client to an Extension

What is the 3CX Client?

- A Software Application
- Runs on existing Hardware (PC or Mobile Device)
- Provides key Telephony Functionality
- Rich on Features and Presence Views
- Seamless Internal and/or External use
- Ability to combine with standard IP phone(s) (SIP Forking)

Prereq: Operating System Desktops

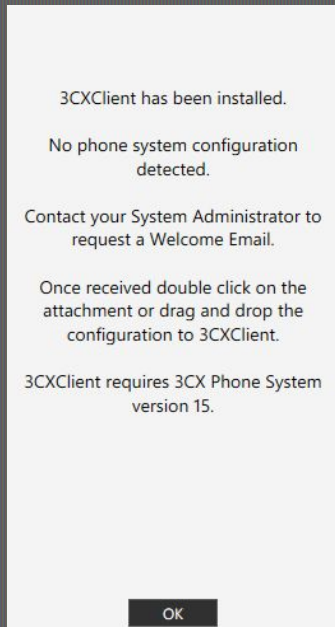
- Windows PC
 - Windows 10, 8.1, 8 and 7 SP1
 - Preferred Windows 10
- Mac OS
 - Mac OS 10.12, 10.11, 10.10
 - Preferred Mac OS 10.12 (Sierra)

Prereq: Operating System Mobile

- Apple iOS (iPhone, iPad, iPod)
 - iOS 10
 - App Store Account
- Android (Mobile, Tablets)
 - Firmware 6.X, 5.X, 4.X
 - Preferred: 6.X
 - Google Play Store Account

Installing the 3CX Client

- Windows & Mac:
 - Download the 3CX client
 - Windows: Run the installer
 - Mac: DMG installer
- Smartphone:
 - In the App Store search for the **3CX Client**
 - Install the App



What is Provisioning?

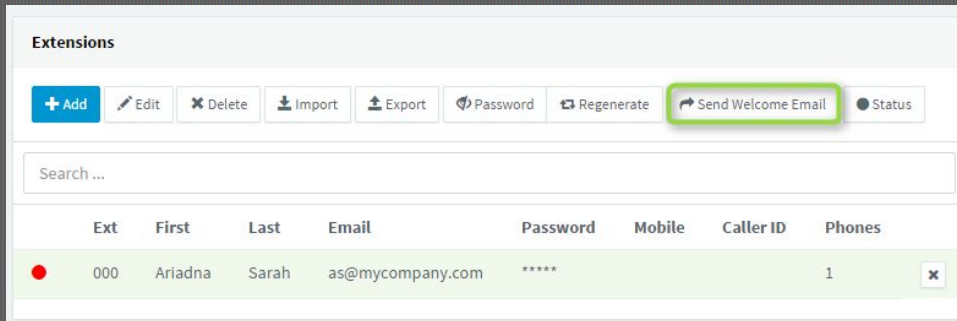
- Provisioning = Providing
 - Prefilled Configuration
 - Vendor Specific Syntax
 - Removes Human Errors
 - Boost Deployment Speed

Concept: Welcome Email Provisioning

- Universal for all 3CX clients
- Great for Remote Workers
- Based on Email Attachment
 - Admin triggers Welcome Email
(or system send it automatically upon extension creation)
 - User receives email with attachment
 - User opens attachment
 - 3CX client imports Config

Using: Welcome Email Provisioning

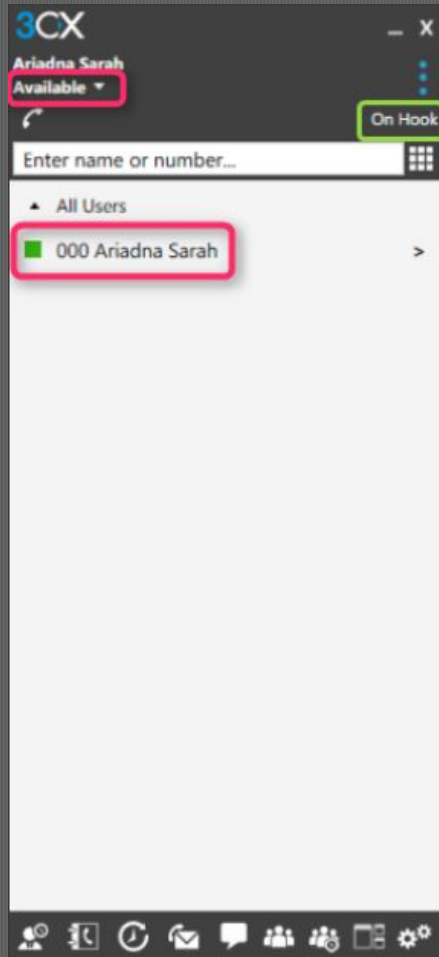
- Management Console → Extensions node
- Highlight Extension → Send Welcome Email
- Open the Welcome Email and open “Attachment”



The screenshot displays the 'Extensions' management interface. At the top, there is a toolbar with buttons for '+ Add', 'Edit', 'Delete', 'Import', 'Export', 'Password', 'Regenerate', 'Send Welcome Email' (highlighted with a green box), and 'Status'. Below the toolbar is a search bar labeled 'Search ...'. Underneath the search bar is a table with the following columns: Ext, First, Last, Email, Password, Mobile, Caller ID, and Phones. A single extension is listed in the table with a red status indicator.

Ext	First	Last	Email	Password	Mobile	Caller ID	Phones
000	Ariadna	Sarah	as@mycompany.com	*****			1

Done!




Going Mobile

- 3CX is always “Dual Location” Provisioned
- For External Use (outside of LAN)
 - Open NAT Ports WAN → 3CX PBX:
 - 5090 TCP & UDP
 - HTTPS Port (usually 5001 or 443 TCP)
 - 3G / 4G / WiFi

Full take on NAT and Remote Extension in course
Basic 1.3 - Configure the Firewall

Going Mobile - PUSH

- Available for Mobile Devices (iOS and Android)
- Uses Native Operating System Abilities
- No Manual Configuration Required
- Allows APP to hibernate
 - No Battery Consumption
 - Wakes Up On Incoming Calls
- Flow:
Incoming Call → 3CX → Vendor Push Service → Mobile Device → APP



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More Training Material at:
www.3cx.com/3CXAcademy

