



Instruction Sheet Htek UC903 Phone



Receiving Calls

Receiving phones is no different than any other phone. Just pick up the handset or push the speaker button for handsfree operation. If using a headset just push the headset button.

Making Call

Pickup handset then dial a 10- or 11-digit number and press the # key.

For Handsfree use, press the speaker button, then enter the 10 or 11 digit number and press the # key.

To dial another extension in your organization, dial the extension number instead of entering a phone number.

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HOLD

There are 2 different ways of placing a call on **HOLD**.

1. During a call press the HOLD button on the phone. This will place the call on local HOLD on your phone. Only you can pick the call back up again by pressing the Line Key.

This is useful if you need to transfer the call and want to let your co-worker know in advance that a call is coming to them via an Attended Transfer.

2. During the call press one of the shared park buttons on the right side of the display. This is referred to as Parking the Call. Anyone with a phone in your organization can pick-up this call using their phone. The user would press the appropriate shared park (SPO) button on their phone and receive the call.

There are 3 shared parking positions, you will need to inform a coworker which position you parked the call, so they choose the correct button on their phone.

SP0

SP1

SP2

TRANSFER CALLS

There are 2 different call transfer methods. Blind Transfer and Attendant Transfer

1. **Blind Transfer.** This will just transfer the call to the extension you choose without the person knowing that a call is being transferred to them. To perform a Blind Transfer while on a call with someone, simply press the transfer button on the phone, then enter the extension number you want to transfer call too and hang up your phone.
2. **Attended Transfer.** This enables you to inform your co-worker that you will be transferring a call to them. To perform an attendant transfer. While on a call press the HOLD Button on your phone. This will place the call on HOLD on Line one. Press Line two on your phone and dial the extension you want to transfer the call too. Inform the person you will be transferring the call to them. Then Press Line one to get the caller back. Tell them you are transferring them. Press the Transfer Button on the phone, then enter the extension number and hang up.

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CONFERENCE CALL

1. If you are on a call and you would like to conference someone else into the call. Simply press the conference button on your phone, enter the number of the phone you wish to conference into the call. When the party answers the call tell them you will conference them into your call and press conference button on your phone again.

You can add more people to conference in the same manor.

CREATING A SCHEDULED CONFERENCE CALL

If you wish to setup a call conference directly from your Desk Phone, you will need to inform the other participants of the conference ID and the number they would need to dial. For example, internal callers will need to dial “700” but external participants will need to dial a specific DID AAA-XXX-YYY or else dial “700” at the digital receptionist (IVR) menu. They will then need to enter the conference ID that you specified for the conference call.

The following steps illustrate how to set up a call directly from your Desk Phone:

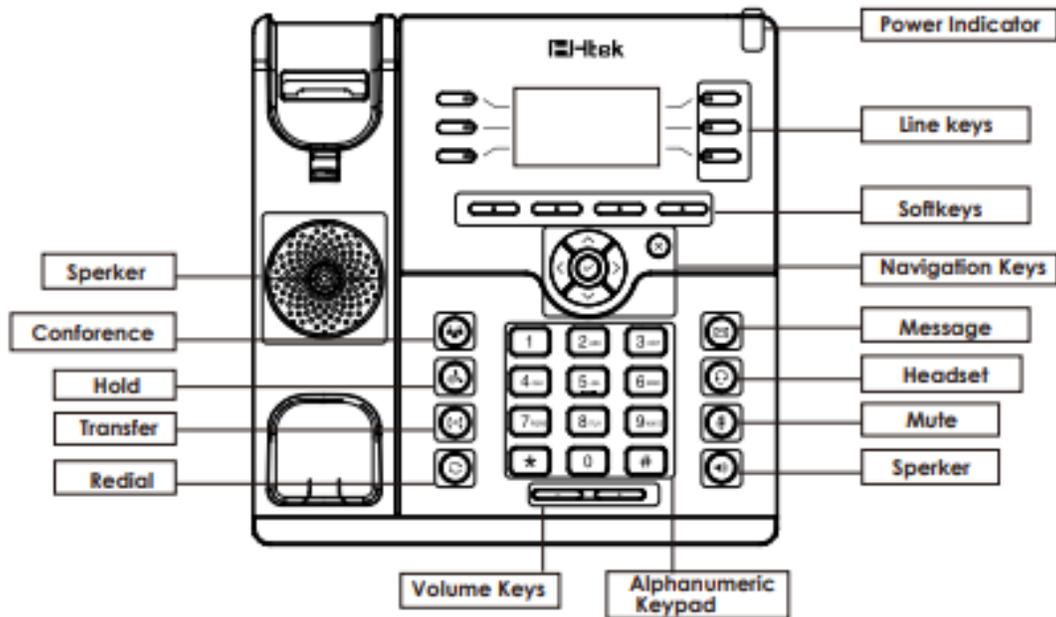
1. Dial the conference extension number, “700”.
2. You will be requested to enter a conference ID. This can be any number, for example “25” and will be the unique identifier (conference ID) for that specific conference session. If you are the first participant, the conference interface will ask you to confirm creation of the conference. Press * to confirm or # to cancel.
3. You will be asked to speak your name after the beep and press a button to continue.
4. All callers who wish to join the conference must dial 973-419-5060 from outside your company or 700 from their company phone to enter the conference menu and then further specify the same conference ID to join a conference.
5. You will now enter the conference. If you are the first caller, you will hear music on hold, while you wait for the other callers. As soon as another caller joins, his name will be announced.

Note: Prior to creating the conference, you should notify all of the participants you require to be present in the conference. This notification should include the conference phone number and conference ID.

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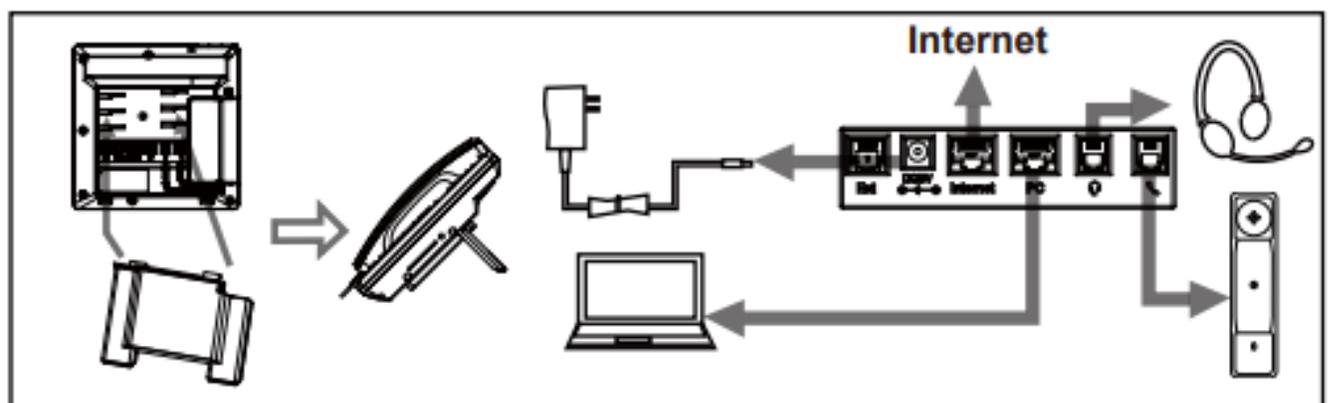
Hardware Overview



LED

Installation Instructions

Instruction



Plug the Ethernet Wire coming from your wall jack to the Internet port

Plug the handset cord into the handset port.

DO NOT USE A POWER ADAPTER UNLESS DIRECTED TO DO SO.

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Using the 3CX Phone Client

Introduction

The 3CX Client allows you to manage your office calls from your desktop or smartphone as well as making and receiving calls, even when you are not in the office. Using just a headset, the 3CX Client can function as a complete desk phone replacement with a vast range of features such as: dragging and dropping calls for easy transfer, setting hot keys, launching calls from your CRM and much more.

The 3CX client can either make calls using the inbuilt softphone, or calls can be triggered on a supported IP Phone (CTI).

Elevate a call to a video call from the 3CX Client for Windows

When dealing with a customer, or even a potential customer, face-to-face communication is more powerful than any other form of contact. Do not let distance get in the way of your business. With the 3CX client for Windows, you can easily start a video call on the spot between two or more parties as long as they have a video capable IP Phone or are using the 3CX Windows client.

While in a call with someone who has a camera and a microphone, or a video capable IP



Phone: Click the **“Video”** button.

1. The Video window will appear and your call will now include video. During the video session you will be able to share your screen, change the settings or even take a photo.

Making Calls

You can initiate a call in the following ways in the 3CX client:

- Keypad - press the  button next to the Search bar, enter the number and click **“Call”**.
- Phonebook - Click on the **“Contacts”**  button in the bottom menu of your client. Double click, right click or tap on the contact that you want to call and click **“Call.”**
- Hotkeys - Use a key or a combination of keys on your keyboard.
- Call History - Click on the **“Call History”**  button on the bottom menu, find the call entry and double click or tap. To access Contact Details and select the action press **“>”** on PC and Android, otherwise tap on the contact.
- Presence screen - Check if the person is available before calling. Click on the **“Presence”**  icon and select or search the desired contact. Press on the

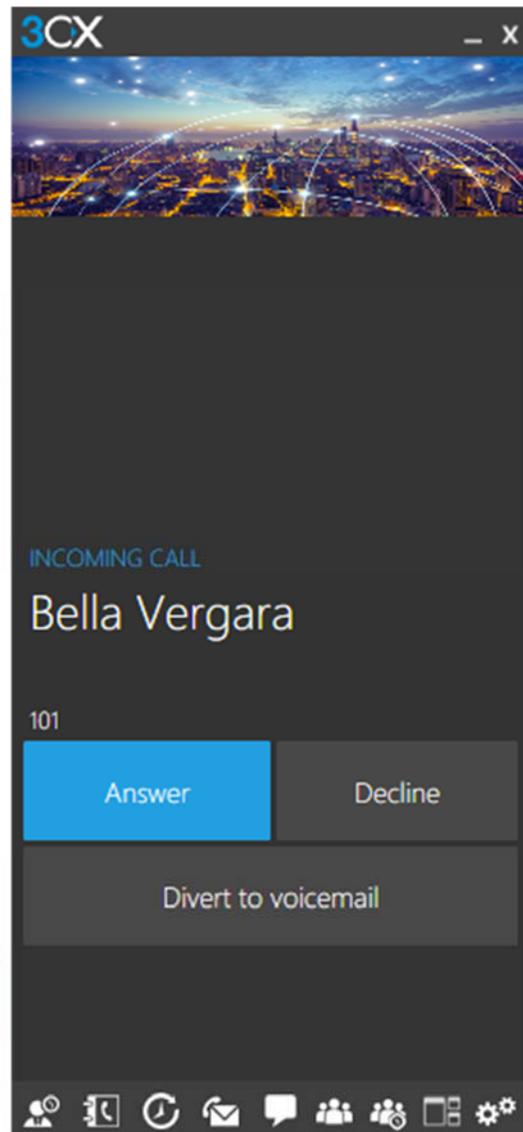
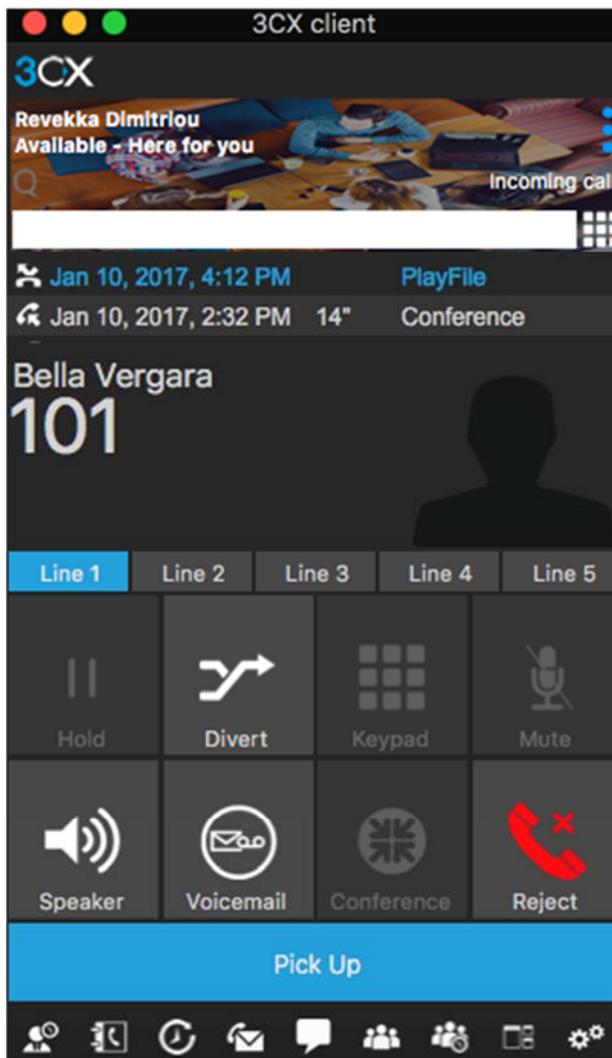
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contact and then click **“Call”** to perform the action. In Android just tap on the desired contact and the call will be initiated immediately. For more actions you can press the **“>”** on PC, Android and iOS or right click on Mac.

Receiving Calls with the 3CX Client

When you receive a call, the following screen will appear. Click **“Answer”**, **“Decline”** or **“Divert to Voicemail”** accordingly. With the Mac client you may also **“Divert”** the call to another extension without the need to answer the call.



Tips:

If you have the Focus feature enabled, on your Windows or Mac client, then the client will automatically pop up.

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If you have Auto Answer feature enabled, on your Windows or Mac client, then the client will automatically answer the call.

1. When a call is received, the 3CX Client for Android and iOS use PUSH technology to wake up the smartphone when it is in sleep mode, thus saving battery life.
2. On the smartphone clients you can see the missed call in the notifications bar as well as from the locked screen.

Transferring Calls with the 3CX Client

Introduction

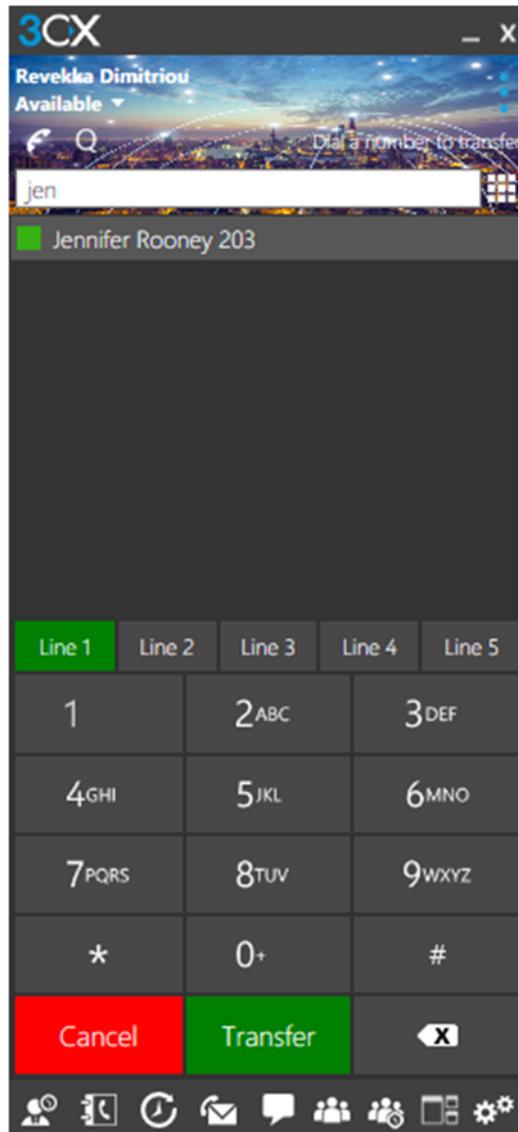
We have all received calls meant for another extension. Transferring the call avoids having to ask the caller to call back and as a result improves user experience, customer service and the efficiency within the workplace. The 3CX client allows you to seamlessly and easily transfer calls to other users.

There are two ways to transfer calls:

Blind Transfer

With a Blind Transfer you can transfer the call without notifying the recipient.

1. While in a call, click on the “**Transfer**” button .
2. You can select a contact by:
 - a. Typing or tapping the number or the name of the contact you want to transfer the call to. The 3CX Client will filter your contact list and suggest users/extensions (only in Windows and Mac).
 - b. Press the Phonebook, Presence, or Call History tabs and select the desired contact.



3. Click on the **“Transfer”** button to transfer the call. The call will be transferred as soon as the recipient accepts the call or you press **“End.”**

Attended Transfer

With an Attended Transfer you are able to notify the recipient before transferring the call. During this time, the caller is on hold and the transfer is completed only when the recipient agrees to accept it and you hang up. To perform an attended transfer:

1. While in a call, click the **“Att. Transfer”** button .
2. Dial the number or name you want to transfer the call to, or select a contact from Presence, Phonebook or Call History, click the **“Call”** button and announce the



caller waiting on the line. The line on hold will be marked as orange while the active line is marked in green.

3. After confirming that the recipient wants to take the call, click the “**Transfer**” button , hang up, and the call will be transferred to the recipient.





Other Features (available for Windows)

Drag and Drop

This feature is a great help, especially for receptionists. In the [Receptionist view](#), you can transfer a call just by using drag and drop. This is available only for blind transfers.

The 3CX Presence Screen

In the following illustration you will see the 3cx Phone Client making an outbound call to 973-440-5811.

On the Presence screen you will see 2 active calls on the top pane.

You will also see a list of the extensions in your group displaying their current status.

Color of the extension displays that extensions status. Hovering over the extension with your mouse will also inform you of their status.

Right mouse click on their extension will give you choices to

Call Extension

Call Mobile Number

Leave Voicemail

Intercom

Conference

Chat

Email

Transferring Calls

You can click on and active call and drag and drop it to an extension to do a Blind Transfer



Parking Calls

You can right click on an active call and park the call

The screenshot displays the 3CX software interface. On the left, a call control panel shows the number 19734405811 and a timer at 00:00:08. Below the number are buttons for Hold, Transfer, Keypad, Mute, Speaker, Att.trans..., Confere..., and Rec. A red 'End' button is at the bottom. On the right, a call log table shows active calls:

Caller	Callee	Durati...	D...
Andy Kallistros[2020]	Sales 3 Office[1973440581]	00:00:10	Ex
Bruce Kreeger[2001]	Clarity IVR[8004]	00:00:00	Ex

Below the call log is a list of destinations for parking calls, including 'Clarity Mine Hill' and various office and department numbers. A red 'End' button is visible at the bottom of the interface.

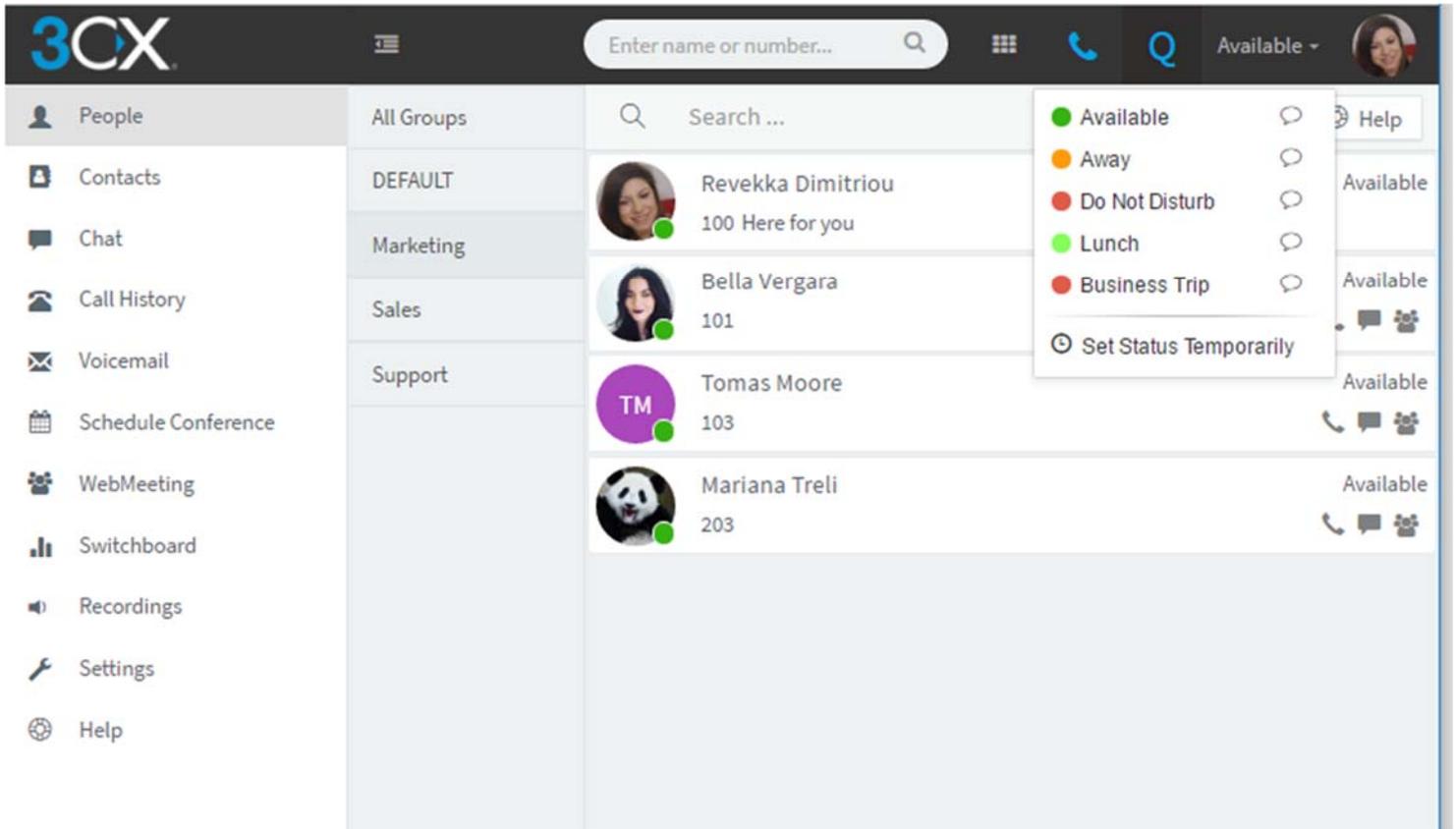
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The 3CX Web Client

Introduction

The 3CX web client gives you easy access to all features of 3CX, including Presence, Video conferencing, chat and the switchboard. It also allows you to easily make calls from your IP Phone, desktop or smartphone.



Note: The web client requires Google Chrome, Mozilla Firefox or Microsoft Edge.

Logging On

The credentials to the 3CX web client can be found in your welcome email. Click on the URL provided and enter your extension number followed by the password.

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Navigating the web client - Account, Status, Dial Pad

At the top right corner of the web client you will find key options:

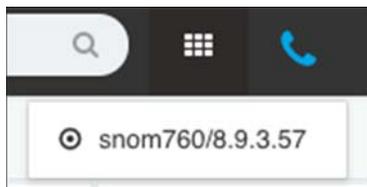
- Search box - search for a colleague or contact.
- Dial Pad - Trigger calls on your IP Phone or Softphone.
- Set Preferred device for making calls.
- Status - Set your status and status message from here. [More info.](#)
- Account - Configure your extension options from here.

To the left of the client the key functions of 3CX are listed.

The default page will show your colleagues and their status. To call or chat with a colleague, click on the appropriate grey icon in the right hand corner.

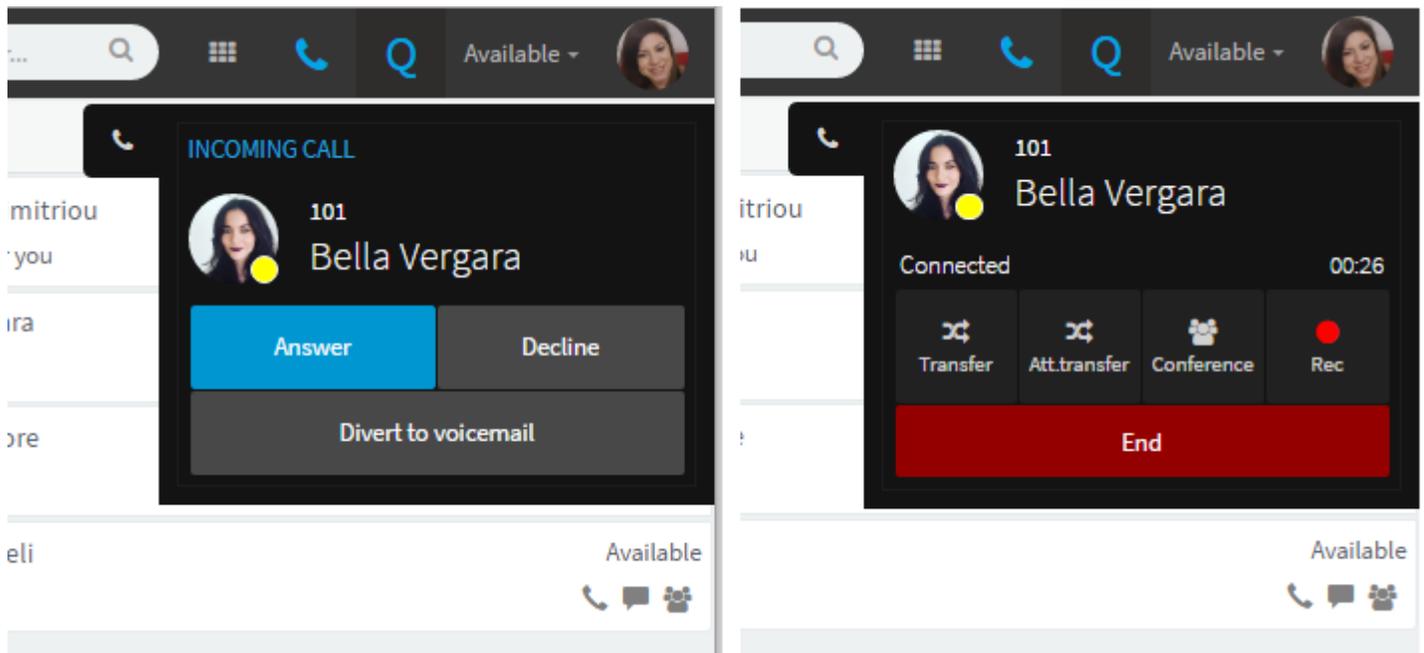
Making Calls

Calls can be triggered from the web client and will be placed on your IP Phone, Softphone or Smartphone. Select which device you want to make calls on using the Phone Selector:



The phone selector lists all available devices for your extension.

Receiving calls



When a call comes in, you can answer or decline it from the pop menu. If you have an active call, you can transfer, record or elevate it to a conference call.

Elevate a call to a conference call

While on a call, you might need to ask the assistance of a third party. You can do so by elevating the call to a conference call and adding more people in the conversation. With 3CX there is no need to hang up the phone in order to create a conference call.

1. While in a call click the **“Conference”** button to go to the conference screen.
2. Follow the steps below to add participants and proceed with the conference call.

Tip: To view, edit or delete the scheduled conferences go to the conference tab and click **“Schedule Conferences.”**

Add More Participants to an Ongoing Conference

1. Click the **“Schedule Conference”** button, and then select **“My Private Conference”**
2. Click the **“+”** button and select the desired contact from the list. You can only add participants from your Contact list.



Scheduling an Audio or Video Conference

Introduction

With the 3CX Client you can easily schedule audio and conference calls, web meetings or webinars. 3CX's integrated video conferencing uses [WebRTC technology](#), so your participants don't have to download and install any additional software or plugins.

Cancel Save

Schedule Conference

Audio Video

Now Schedule

04/10/2017 11 : 51 AM Duration 30 min

Subject
Test conference

Notes to participants
Join at the link

Enable announcements

Add Participants or [Import](#)

Search

Participants
Nicky Borg (114, nb@3cx.com)

Scheduling a Conference

1. Click on the “**Schedule Conference**” option.
2. Select whether you wish to hold an audio or video conference.

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3. Select **“Now”** or **“Schedule”**.
4. If scheduled, set the **“Date”**, **“Time”** and **“Duration”** of the meeting.
5. Enter the **“Subject”** of the conference and add **“Notes”** if needed.
6. Enter the Name (if in your contact list) or **“Email”** address of the participant to be invited. You can also import participants from a CSV file by clicking on **“Import”**.
7. If you selected an Audio conference, check **“Enable announcements”** to hear an announcement whenever a participant enters the conference.
8. If you selected a video conference, you can choose a conference profile. The **“Webmeeting Profile”** is optimized for meetings between people and the **“Webinar Profile”** is optimized for presenting or instructing participants. You can adjust the default settings for each profile by clicking on the spanner.
9. Click the **“Save”** button. All participants will be sent an email with the web meeting URL they need to use to access your conference.

Online 3CX User's Manual

<https://www.3cx.com/user-manual>