

FAQ's from 3CX v18 Overview Webinar October 2021

Thanks for registering for our 3CX Webinar held yesterday. We had several questions towards the end of the Q&A session so we're just wrapping these up for everyone in this FAQ document along with a few clarifications.

SMS providers:

There are currently 5 approved globally by 3CX. You can find more information at <https://www.3cx.com/docs/manual/sms-text/> which has details on the current 5. There are active conversations occurring with NZ SIP Trunk providers to look at SMS. As more information comes to hand, we will update you.

SBC Requirements:

You require an SBC between your cloud hosted instance and your phones. There is an updated SBC for version 18 - check out: <https://www.3cx.com/blog/releases/sbc-update-v18/>.

Abandoned Calls within Queues:

This query is around how 3CX treats calls that go through a queue and then circle back through the system ie non answered are treated as "Abandoned" vs "just circling back through". This is on the 3CX forum, but we have not heard any updates on changes around this.

Comfort messages within the queues:

Please let us know what you're trying to achieve as there may be a work around, but currently nothing new on this front.

Education pricing:

There is no special pricing for education - as the licenses are licensed per simultaneous call vs per person or per extension it's a very cost-effective solution.

Mac desktop app:

Currently the WebClient via a browser for the Mac platform is the only option. With the new Windows Desktop App being Electron the development team are looking at Mac options. We'll update you when we hear more!

Microsoft 365 License Details + Stefan Walther, CEO of 3CX, walk through videos:

What is and isn't supported from Microsoft 365 with each edition of 3CX is found in the 3CX Microsoft 365 integration guide. This also clearly highlights what type of Microsoft 365 license is required. Please visit: <https://www.3cx.com/docs/microsoft-365-integration/>.

Unifying 3CX with Microsoft 365 - Stefan Walther, CEO of 3CX, has released a 3-part series of video walkthroughs to help you get the most out of your systems.

- [Part 1](#) = Initial set up and sync of Microsoft Azure
- [Part 2](#) = Single Sign-On (SSO)
- [Part 3](#) = Teams Direct Routing

Microsoft Teams Integration Guide:

The full Microsoft Teams integration guide is at this link: <https://www.3cx.com/docs/microsoft-teams-business-voice/>. Remember to keep checking back for updated information.

Trial licenses and Proof of Concept (POC):

Clarifying the two pathways for your clients and key pieces of information around Trial licenses.

1. Create all trial licenses from within your Partner Portal so they are linked to your Partner ID.
2. All trials start as 4-SC Standard licenses.
3. When creating a trial, you must give the end customer details regardless of whether you are the MSP partner for their license.
4. There are then two (2) options for upgrading those licenses which are detailed below. You can only use **one of the pathways not both**.
 - a. Upgrade the Standard 4-SC to 4-SC Professional or Enterprise free for one year.
 - i. This is done logging in to the portal as the client.
 - ii. The license is owned by the customer and therefore their contact details remain in the portal.
 - b. OR Upgrade the Standard 4-SC to any size Professional or Enterprise license via the POC Method.
 - i. The POC method is done from within your Partner Portal.
 - ii. The upgrade is temporary for proof-of-concept purposes.
 - iii. The time frame is **45 days** not 60 days as mentioned on the webinar. It was 60 days when the POC was first introduced but has been revised back to the previous 45-day period which is a generous period of time for a client to assess the license.
5. To turn a trial license into a live paid subscription of a higher simultaneous call count or edition, let our admin@sofsol.co.nz team know that you have a trial key and the key number, and they can make that live for you.
6. When the license goes live, you need to consider who is the owner of the license. There are two options here:
 - a. The end customer owns the license and therefore no changes are made to the customer contact details in the Customer Portal.
 - b. OR You as the 3CX partner are running the license as a MSP bundled model and own the license. If this is the case, you can login to the Customer Portal as the customer and update the contact details.
7. NB: The key element with contact details is who owns the license so that 3CX has a direct path to contact them about the latest news and information.

Upgrade path:

For Windows due to the infrastructure, you still require a backup and restore solution. For Linux installations this is an inline upgrade. Check out this Linux specific blog for the 8% of times something may go wrong: <https://www.3cx.com/blog/docs/linux-upgrade-troubleshooting-tips/>. Remember v18 uses Debian 10, v16 uses Debian 9.

Desktop app vs Softphone app:

Currently the Desktop app doesn't have drag and drop available. We are very aware that customers specifically use the SoftPhone app on Windows for this specific feature. If anything changes, we will update via our communications.

Technical Certifications:

If you are qualified at version 15.5, 16 or 18 the qualification does not expire. As information has changed, you are more than welcome to attend our training courses for a refresher. The training materials online at 3CX's Academy pages <https://www.3cx.com/3cxacademy/> are extremely helpful. You can watch the videos, read the slides and even access the presenter notes.

Partner Portal – License Management:

The Instance Manage, within your Partner Portal, is for managing your Linux installations. Due to the Windows infrastructure 3CX are unable to offer the same functionality for Windows installations currently.

3CX's Marketing Kit – 2021

The Marketing Kit within the Partner Portal has been updated with new version 18 materials – still more to come. Highlights within the kit which is in the “Resources” area of your Partner Portal include:

- New screenshots to use in your marketing efforts.
- Updated 3CX vs MS Teams document showing them working in tandem and why leading with 3CX is best.
- Update 3CX sales presentation.

You need access to your Partner Portal to download this toolkit.

Don't hesitate to reach out if we can assist further on voip@sofsol.co.nz.