Gear up your PBX
Cut Costs, Boost Profits

Upgrading / Reinstalling

3CX®

Goal of this Module

- Correct Housekeeping of a 3CX install
  - Backups
    - Scheduling
    - Host & User Data
    - Tips
  - Upgrade to a new Major Version
  - Upgrade to a new Minor Version
  - Maintenance Updates

Backup Usage

- Stores 3CX config in a single ZIP
- Used for:
  - Migration (e.g. Host change)
  - Reinstalls (e.g Local LAN IP change)
  - Major Version Upgrades (e.g. 14.0 →15.0)
  - Revision & Recovery
  - Failover Sync

Backup Plans

- Integrated in the Management Console
  - On Demand Backup
  - Scheduled Nightly Backup Plan
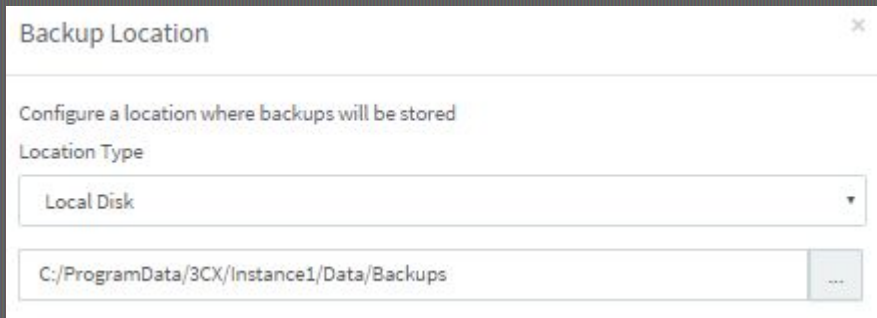   (turn it on, be safe)

Backup Options

- Main configuration always included
    - → Extensions & Groups settings
    - → Trunks & In-/Outbound rules
    - → System Extensions
- Optional Includes

Select what you want to include in your backup

- ☐ Full System Configuration
- ☑ Include License Key Information & FQDN
- ☑ Call logs, Chats and Conference data
- ☐ System Voice Prompts and Audio Files for music onhold
- ☐ Custom templates and IP Phone Firmwares
- ☐ Voicemails
- ☐ Recordings (Backup and Restore will take longer)

Backup Tips

- Change Backup Location!
  - Default Repository will be ERASED during uninstallation

Backup Location ✕

Configure a location where backups will be stored

Location Type

| Local Disk | ▾ |

| C:/ProgramData/3CX/Instance1/Data/Backups | ... |

- Recordings
  - Place Recordings onto different Path
  - Define recording location from beginning
    (Report consistency)

Backup Scheduling

- 3CX Management Console > Backup and Restore > Backup Schedule
- Choose Backup Options
- Set occurrence timer (Daily or Weekly)
- Configure Retention Policy

Backup Schedule

☑ Enable Schedule Backup

Backup Scheduling

Select what you want to include in your backup. Backup will be named 3CXScheduledBackup.zip

☐ Full System Configuration

☑ Include License Key Information & FQDN

☑ Call logs, Chats and Conference data

☐ System Voice Prompts and Audio Files for music onhold

☐ Custom templates and IP Phone Firmwares

☐ Voicemails

☐ Recordings (Backup and Restore will take longer)

Schedule

Configure Backup Schedule

| Daily at | 23 : 45 |

Configure backup rotation

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Backup - Host and User Data

- Host Data (not restored)
  - SIP & Tunnel Ports
  - External RTP Ports
- User Data (restored)
  - System-/Extensions
  - VoIP Providers/Gateways
  - Prompts
  - Audio Files
  - License Key, FQDN & SSL Certificate (Optional)

Upgrade: Major Version

- **Backup** current configuration
- Uninstall existing 3CX (remember to place the backup in a folder outside of 3CX)
- Download new version (15.0)
- Install 3CX
- Perform restore at initial setup

Major Version Upgrade Path

- 12.5 SP2 (separate Call History Converter)
- 14.0 SP3 Stand Alone
- 14.0 SP3 Cloud Server Instance
- Older Versions
  - See Admin Guide for more Information

Upgrade: Minor Version (Service Pack)

- Inplace Upgrade
- 3CX Management Console → Updates
- Select Service Pack and Download
- Installation will start automatically (Services will be stopped during this time)
- Update-Status via E-Mail (Service will be started automatically)

Other Updates

- User Experience Update
- Does not Interrupt PBX Services
- Get the best compatibility

Updates

3CX clients (1)	>
Phone Firmware (51)	>
Promptsets (15)	>
Integration (8)	>
Other (1)	>

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