Gear up your PBX
Cut Costs, Boost Profits

Extension Rights and Groups

3CX

Goal of this Module

- Control extensions capabilities on other extensions
    - Create Departments (Groups)
    - Assign Users (Extension)
    - Define User Role
    - Set Rights
    - Delegate Management Console Access

Concepts: Groups

- 3CX Management Console → Groups
- Create Groups as Departments
  - Add User to Group:
    - Can be part of multiple Groups
    - Can see others in Groups
    - Can perform action to others in Groups

Groups Right Presets

- Splitted into
  - Manager Role
  - User Role
- Presets Rights on a per Group Base
- Assign Preset to a Group-Member

☑ Can see group members

   ☑ Can see group calls

☑ Show presence to group members

   ☑ Show calls to group members

☑ Perform operations on active calls to group members (divert, transfer, pickup)

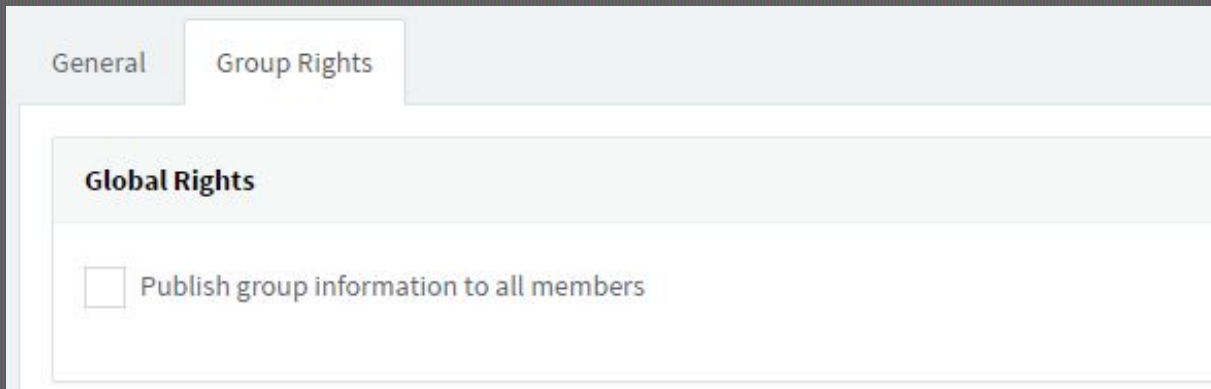☑ Can Barge in, listen or whisper (requires 3CX PRO Edition)

☑ Can intercom

☑ Can park calls

☑ Can control IVR

☐ Can manage the company phonebook

Group Rights Control

- Management Rights
  - Manage Phonebook (Company PhoneBook)
  - IVR Control
- Presence Rights
  - Extension Visibility
  - Extension Calls
- Action Rights (req. Visibility of User and Calls)
  - Parking
  - Intercom
  - Call Manipulation - Divert, Transfer, Take calls
  - Barge In, Listen, Whisper (PRO)

Extension: Specific Group Rights

- On a per User basis
- Overrides Group Presets
  - Finetuning

Group Publishing

- Makes All Extensions Visible to Everyone
  - No Calls visible
  - No Control Actions

Group Samples

- Group A
  - User A
    - Show Presence ON
    - Can See Member ON
- Group B
  - User B
    - Show Presence ON
    - Can See Members ON
- Result: A can not see B and vice Versa

Group Samples

- Group A
  - User A
    - Show Presence ON
    - Can See Member ON
  - User B
    - Show Presence OFF
    - Can See Members ON
- Result: A can not see B but B can see A

Group Samples

- Group A
  - User A
    - Show Presence ON
    - Can See Member OFF
  - User B
    - Show Presence ON
    - Can See Members OFF
- Result: Group A is not shown to A and B as it is "empty"
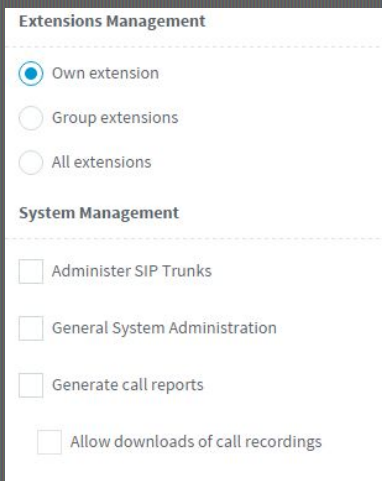
Group Samples

- Group A
  - User A
    - Show Presence ON
    - Can See Members OFF
  - User B
    - Show Presence ON
    - Can See Members OFF
- Group B
  - User A
    - Show Presence ON
    - Can See Members ON
  - User B
    - Show Presence ON
    - Can See Members ON
- Result: Group A is not shown to A & B as it is "empty"
  but A & B can see each other in Group B

Presence: 3CX Client
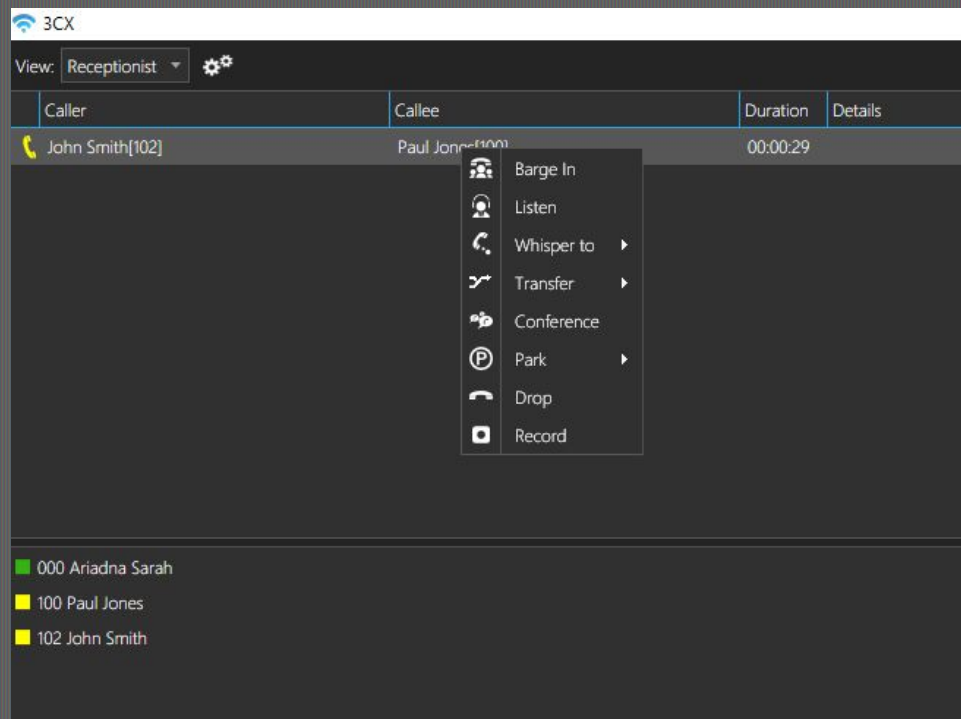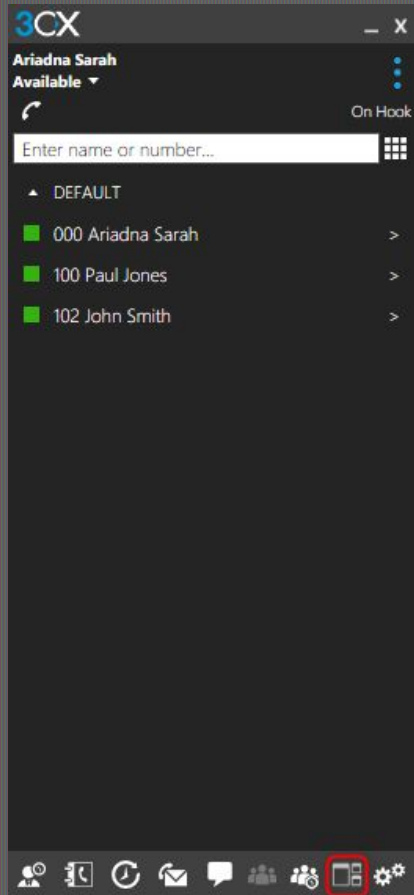
Management Console Delegation

- 3CX Management Console → Extension → Rights
- Allows Users to Configure other Users
  - Extension Management
    - Granular Extension Management
  - System Management
    - SIP Trunks
    - Administrator Rights
    - Reports
    - Recordings

Extensions Management

- ◉ Own extension
- ○ Group extensions
- ○ All extensions

System Management

- ☐ Administer SIP Trunks
- ☐ General System Administration
- ☐ Generate call reports
  - ☐ Allow downloads of call recordings

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