

PBX Migration Guide

Switch from 3CX to Yeastar Phone System

Version: 1.0 Date: 2024-03-25







Contents

About This Guide	1
PBX Migration Checklist	4
Prepare for Migration	6
Prepare 3CX Data for Migration	6
Log in to 3CX Management Console	9
Backup 3CX Data	10
Set up Yeastar PBX	12
Set up Yeastar P-Series Software Edition	12
Set up Yeastar P-Series Cloud Edition	18
Migrate Users and Configuration Data	22
Import Users and Contacts	
Import 3CX Users to Yeastar PBX	22
Import 3CX Contacts to Yeastar PBX	24
Replicate Basic System Settings	
Replicate Settings of Business hours & holidays	26
Upload Voice Prompt Files	
Replicate Settings of CALL Features	33
Replicate Settings of Ring Groups	
Replicate Settings of Digital Receptionist (IVR)	35
Replicate Settings of Call Queues	37
Replicate Settings of Voicemail	41
Replicate System Security Settings	
Replicate Settings of Allowed Country Code	42
Replicate Settings of Blacklisted Numbers	
Replicate Settings of IP Blacklist / Whitelist	45
Set up Linkus Clients for Users	48
Migrate SIP Trunks	52
Migrate SIP Trunks	52
Replicate Settings of Call Control	55
Replicate Settings of Inbound Route	55

58
62
66
66
66
69
71
76
80
84

About This Guide

This guide offers a step-by-step process for migrating from 3CX (V18) to Yeastar PBX.

Introduction

Purpose

This guide aims to assist you in setting up a Yeastar PBX system and facilitating the seamless transfer of user data and system configuration from your existing 3CX system to Yeastar PBX.

Migration scope

This guide covers the migration of all essential user and configuration data, as detailed in the table below.

Data Type	Data
User Data	 Account information: Extension number, user names, email address, mobile number Account settings: Voicemail (whether enable and pin), IP phone registration credentials Contacts
Configuration Data	 Basic settings: Business Hours & Holiday, Voice Prompt Call features: IVR, Ring Group, Queue, Voicemail System security: Allowed Country Codes, Blacklisted Numbers, IP Blacklist SIP trunks Call control: Inbound Route, Outbound Route, Emergency Number

Highlights

Minimized business disruption

The User Data > System Configuration > SIP Trunks migration strategy ensures uninterrupted 3CX functionality during the migration process until the final step of trunk setup, and enables Yeastar PBX for immediate use upon trunk setup completion, thereby minimizing business downtime.

Seamless operation experience for users

By replicating user data and configuration data from 3CX to Yeastar PBX, users can utilize Yeastar PBX with their original account information (extension numbers, email address, etc.) and system configurations (IVR, ring group,

call queue, inbound/outbound route, etc.), facilitating a swift and hassle-free adoption of Yeastar PBX.

Intuitive configuration instructions

Direct interface mapping between 3CX and Yeastar for swift configuration replication, minimizing time and effort.

3CX	💤 Yeastar
Configure Holidays ×	
In addition to office hours and days of the week, you can define specific dates as public holidays, so that these dates will be considered out of office	Basic
Name O	* Name
New Year	New Year a
Single Day v 1 v January v Every Year v 14:00-18:00	
Prompt: Format WAV (PCM, 8 kHz, 16 bit, Mono, Max size: 100MB)	Туре
new_warg.greeting.wav + Add @ Record III Manage 0 Information: If no prompt is selected, the eliquit "Out of effice 1/0" (1401) will be triggered for yalls on this holiday.	For one-time holidays, select By Date * Holiday Type For annual holidays, select By Month
OK Cancel	> By Month D
	* Date
	▶ [01/01 14:00 ~ 01/01 18:00 🖻] 🕒
	Prompt
	new_year-greeting.wav V

Best practise

Utilize 2 monitors to simultaneously view the 3CX and Yeastar interfaces, allowing for direct comparison and operation without the need to switch between browser tabs.



Phase 1 Prepare for Migration > Prepare 3CX data	Phase 2 Set up Yeastar PBX Set up Yeastar P-Series	Phase 3 Copy User & Config Data Import user and contacts	Phase 4 Migrate SIP Trunks Migrate SIP trunks	Phase 5 Migrate IP Phones Migrate IP phones to Yeastar	Phase 6 Launch & More Introduce Yeastar PBX to your
 Log in to 3CX Management Console Backup 3CX data 	Software Edition > Set up Yeastar P-Series Cloud Edition	 Replicate basic system settings (Business hours, Holidays, Voice Prompt) Replicate settings of call features (IVR, Ring Group, Call Queue) Replicate settings of system security (Allowed Country Codes, Blacklisted Numbers, IP Blacklist) Set up Linkus clients 	 Replicate settings of call control (Inbound Route, Outbout Route, Emergency Number) 	Software Edition	clients Manage and maintain your PBXs on Yeastar Central Management Purchase services for PBXs on Yeastar Partner Portal High availability solution: Hot Standby & Disaster Recovery
💤 Yeastar	NOT Ready for	Use	Internal Calls Only (with Linkus Clients)	Fully Operational (with Linkus Clients)	Fully Operational (with Linkus Clients & IP phones)
3CX	Fully Operation	nal		Internal Calls Only	

Migration process

We provide a checklist that outlines all the key steps for migration from 3CX to Yeastar Phone System.

For more information, see PBX Migration Checklist.

Resource and Support

- Yeastar P-Series Phone System documentations
 - P-Series Software Edition Documentation
 - P-Series Cloud Edition Documentation
- Yeastar Academy
- Yeastar Support Portal

PBX Migration Checklist

This article outlines the essential migration procedures for migration from 3CX to Yeastar Phone System.

Phase 1	Prepare for PBX migration
	Prepare 3CX Data for Migration
	Log in to 3CX Management Console
	Backup 3CX Data
Phase 2	Set up Yeastar Phone System
	Set up Yeastar P-Series Software Edition
	Set up Yeastar P-Series Cloud Edition
Phase 3	Migrate user and configuration data
	 Import users and contacts Import 3CX Users to Yeastar PBX Import 3CX Contacts to Yeastar PBX
	 Replicate basic system configurations Replicate Settings of Business hours & holidays Upload Voice Prompt Files
	 Replicate system configurations: Call Features Replicate Settings of Ring Groups Replicate Settings of Digital Receptionist (IVR) Replicate Settings of Call Queues Replicate Settings of Voicemail
	 Replicate system configurations: System Security Replicate Settings of Allowed Country Code Replicate Settings of Blacklisted Numbers Replicate Settings of IP Blacklist / Whitelist
	Set up Linkus Clients for Users
Phase 4	Migrate SIP trunks
	Migrate SIP Trunks
	 Replicate system configurations: Call control Replicate Settings of Inbound Route Replicate Settings of Outbound Route Replicate Settings of Emergency Number
Phase 5	Migrate IP phones
	Migrate IP Phones to Yeastar P-Series Software Edition

	Migrate IP Phones to Yeastar P-Series Cloud Edition
Phase 6	Launch & More
	Introduce Yeastar Phone System to Your Clients
	Manage and Maintain Your PBXs on YCM
	Purchase Services for PBXs on Yeastar Partner Portal
	High Availability Solution: Hot Standby & Disaster Recovery

Prepare for Migration

Prepare 3CX Data for Migration

Before migration, you need to define which 3CX data need migrating and have your clients prepare the data within 3CX for migration.

Step 1. Confirm the migration scope with your client

ltem		Included
User acco	unt	
	Account information: • Extension number • User name • Phone number	~
	• Email address	
	Basic settings: • Whether to enable voicemail • Voicemail pin • IP phone registration credentials	~
	Preference & advanced settings: • Status and forwarding rules • BLF keys • User role	 Note: After-migration, users can set their status, forwarding rules, and BLF keys, while system administrators can create and assign user roles.
Contacts		
	Contact information:	\checkmark
Basic sett	ings	
	Global business hours & holidays	\checkmark
	Voice prompt files	\checkmark

Item		Includ	ed
			Note: To upload voice prompt files, you need to obtain the audio files from your client in advance.
Call featur	e settings		
	Digital receptionists (IVR)	✓	
	Ring groups	<	
	Call queue	<	
	Voicemail	~	
System se	curity settings		
	Allowed country codes	\checkmark	
	Blacklisted numbers	<	
	IP Blacklist	\checkmark	
SIP trunks	· ·		
	Basic information: • ITSP hostname • Authentication credential • DID number	~	
	Advanced settings: • Caller ID	X	
	 Call options Inbound parameters Outbound parameters 		Note: After migration, system administrators can configure the advanced settings for SIP trunks as needed.
Call contro	ol settings		
	Inbound rules	\checkmark	

Item		Included
	Outbound rules	\checkmark
	Emergency number	\checkmark
Integration	ns	
	CRM / WhatsAPP / Microsoft Teams integration	×
		Note: After migration, system administrators can set up the desired integrations.
Call data		
	Call history / Chat history / Recording history	×
	Voicemail	Note:
	Recordings	Confirm with your client whether to backup the call data.

Step 2. Have your client prepare the data for migration

After the migration scope is confirmed, you need to have your clients verify and clean up the source data within 3CX to ensure the accuracy and conciseness of the data to be migrated.

- Confirm all settings within 3CX are current.
- Retain only the necessary data in 3CX system, and delete any deprecated, duplicate, and no-longer-needed data.

For example, delete all the deprecated user accounts, inbound rules, and outbound rules.

• Document any newly added data throughout the migration process.

This will allow you to promptly capture the additions and migrate them to Yeastar Phone System, ensuring the integrity of the migrated data.

Log in to 3CX Management Console

Access the 3CX Management Console to review existing data and settings, which will then be migrated to the Yeastar Phone System.

Procedure

- 1. Obtain the following information from your client:
 - Login address of your client's 3CX Management Console
 - Login credentials of a 3CX account with the role **Owner** (3CX FREE/SMB edition) or **System Admin** (3CX Dedicated Instances)
- 2. Access login address and log in with the obtained credential.

You will be directed to 3CX Management Console.

	≡ 3 CX.								Support • Upda	xs- 🎂-	2 ст
	di Dashboard	Users									(C) Halo
3CX	L Users	0.0010									() map
20X Management Consolo	Phones	Users									
lagement Console	SIP Trunks	+ Add	Zedit X Delete	쓸 Groups	± Import ± Expert	13 Regenerate	P Send Welcome Email	• Status	Q5 Copy Extension		
	Inbound Rules										
	1 Outbound Rules	Search									
	O Digital Receptionists		-		100.000				-	10000	
	🖀 Ring Groups			-				-			
	ALL Call Queues	0.4		-		-		-			
Forgot password?	Backup and Restore			100							
	E Reporting		• -					-			
A	U Security			-							
	O Advanced		• -					-			
	≁ Settings	0.4	-								
	3CX Portal	0.4	•	***	1000						
				-							
					-						

Note:

If you are directed to 3CX Web Client, you can access 3CX Management Console in **Admin > M.Console**.

Dashboard	Battions											
Chat Users												
Voice & chat		≡ 3CX							s	Support+ Up	dates + 🚔 +	2
'D Groups	1.000	II Dashboard	Users									© Hel
tails	10,000	Phones	Users									
Panel Office hours	1000	SIP Trunks	+ Ast	≠Edit ×Del	ete 🗑 Groups 🛛	import ≜ Espo	t 15 Regenerate	📌 Send Welcome Em	al Status	Copy Extension		
Call handling		Cutbound Rules	Search									
call handling		Outbound Rules Digital Receptionists	Search	-	-		-			-		
Call handling		Outbound Rules Digital Receptionists Ring Groups	Search	-					-			
call handling		Outbound Rules Digital Receptionists Ring Groups Call Queues	Search	÷		-	-		÷	i.		1
Call handling		Outbound Rules Digital Receptionists Ring Groups Call Queues Backup and Restore	Search	1			111			1		1
Call handling M.Console Event Log		Outbound Rules Digital Receptionists Ring Groups Call Queues Backup and Restore Reporting V	Search				111		-	1		
Call handling M.Console Event Log		Outbound Rules Duigtal Receptionists Ring Groups Als Call Queues Backup and Rectore Reporting Security	Search		11.1		1111			1		
Call handling M.Console Event Log Buy		Outbound Rules Digital Receptionists Ring Groups E. Call Queues B. Roburng Reporting O. Security J. Advanced	Search		11.1		1111		-			
Call handling M.Console Event Log Buy		 Outbound Rules Digital Receptionists Ring Groups Call Queues Backup and Rectore Reporting Security Advanced Settings 	Search				11111			1		
Call handling M.Console Event Log Buy Help		Outsound Rules Digital Receptionists Ring Groups Call Queues Beckup and Retore Beckup and Retore Beckup and Retore Beckup and Retore Automoting Call Queues Call Queues Beckup and Retore Beckup and Retore <t< td=""><td>Search</td><td></td><td></td><td></td><td>111111</td><td></td><td>1</td><td>1</td><td></td><td></td></t<>	Search				111111		1	1		
Call handling M.Console Event Log Console Event Log Console Event Log		 Outbound Rules Digital Receptionsta Reg Groups Reg Groups Backup and Restore Backup and Restore Reporting Antanod Settings Xin Partal 	Search				1 1 1111		11			

Backup 3CX Data

For data safety, you need to backup 3CX data before migration.

Procedure

- 1. Log in to 3CX Management Console.
- 2. Go to **Backup and Restore** and click **Backup**.

≡	3CX.	Support → Upd
.lı	Dashboard	Backup and Restore
1	Users	
2	Phones	Backup and Restore
0	SIP Trunks	■ Location + Backup / Restore O Download × Delete @ Backup Schedule ▲ Res
+	Inbound Rules	
+	Outbound Rules	Search
Q	Digital Receptionists	
205	Ring Groups	
惠	Call Queues	
0)))	Backup and Restore	
	Reporting 💙	

3. In the pop-up window, create a new backup.

Create New Backup		×
Backup Name: Enter a name for your backup WITHOUT .zip extension. Exa	nple PBX001Backup_05092017	a
Backup-Sample		
Backup will include Full System Configuration (Call History, Chat History, F Select what additional items you will include to your backup.	ecording History, System Voice Prompts and Au	idio Files for music onhold).
License Key Information, FQDN & Conference		
Custom Templates, Logos, Firmwares and Faxes		
Voicemails		
Recordings (Backup and Restore will take longer)		
Enter a Password to encrypt this backup	Backup password	۲
(Alpha-numeric only, no special characters allowed. Backup size will increase.)		
		<u>c</u>
		OK Cancel

- a. Specify a name to help you identify this backup.
- b. Specify which data to be backed up according to your client's requirements.

Note:

If your client requires backup for voicemail and recordings, select the two checkboxes.

c. Click OK.

Set up Yeastar PBX

Set up Yeastar P-Series Software Edition

Before migrating 3CX data to Yeastar PBX, you need to set up Yeastar PBX in advance. This topic describes how to set up Yeastar P-Series **Software Edition**.

Step 1. Install Yeastar P-Series Software Edition

1. Learn about the supported platforms and the server requirements.

For more information, see System and Server Requirements.

2. Refer to the following installation guides to install Yeastar P-Series Software Edition.

Platfrom	Instructions
AWS	Install Yeastar P-Series Software Edition on Amazon AWS
Vultr	Install Yeastar P-Series Software Edition on Vultr
Microsoft Azure	Install Yeastar P-Series Software Edition on Microsoft Azure
DigitalOcean	Install Yeastar P-Series Software Edition on DigitalOcean
Alibaba Cloud	Install Yeastar P-Series Software Edition on Alibaba Cloud
VMware Workstation	Install Yeastar P-Series Software Edition on VMware Workstation
VMware ESXi	Install Yeastar P-Series Software Edition on VMware ESXi
Hyper-V	Install Yeastar P-Series Software Edition on Hyper-V
KVM	Install Yeastar P-Series Software Edition on KVM
Proxmox VE	Install Yeastar P-Series Software Edition on Proxmox VE

Step 2. Configure the system network

After your PBX is installed, you need to access Yeastar Management Portal to set the Ethernet mode and related configuration of corresponding Ethernet interface.

Important:

For PBX system installed on a cloud-based server, retain the default settings, click **Next** to activate the PBX system.

- 1. In the **Basic** section, select the Ethernet mode and default interface.
 - Ethernet Mode: Select an Ethernet mode.
 - **Single**: Only LAN interface is used for connection, WAN interface is disabled.
 - **Dual**: Both LAN interface and WAN interface are used for connection.

Note:

Dual Ethernet mode is typically for the scenario that the Internet Telephony Service Provider (ITSP) offers a dedicated networking for VoIP communication.

- **Default Interface**: Optional. Select a default interface if the system is in dual Ethernet mode.
- 2. In the LAN section, enter the network information for the LAN interface of the PBX.
- 3. **Optional:** In the **WAN** section, enter the network information for the WAN interface of the PBX.
- 4. Click Next.

A pop-up window appears and displays the information of network detection.

Step 3. Activate Yeastar P-Series Software Edition

To activate Yeastar P-Series Software Edition, you need to purchase a license from Yeastar and fill in the provided activation code on the system.

Note:

If the activation code is not ready, click **Skip** to skip this procedure. After the system is set up, you can go to **Maintenance > Activation** to fill in the activation code and activate the system.

Follow the instructions below to activate P-Series Software Edition based on the network availability of the PBX.

- If PBX can access the Internet, see Activate the PBX online.
- If PBX can NOT access the Internet, see Activate the PBX offline.

Activate the PBX online

1. Get activation code.



2. Enter the activation code on the Installation Wizard to activate PBX.

Activation Information	
a 💿 Online 💿 Offline	
* Activation Code	
D	
← Previous	

- a. Select **Online**.
- b. In the Activation Code field, enter the activation code.
- c. Click **Activate**.

Activate the PBX offline

Activation Information	
Online Offline	
Offline Activation Steps: 1. Click to download the activation Request File. 2. Send the Request File to your device provider to get the activation code. 3. Fill in the activation code to activate the device.	
Activation Code	
4. Denteur	4

- 1. Select Offline.
- 2. Click **Download Request File** and send the request file to Yeastar Sales to get an activation code.
- 3. In the **Activation Code** field, enter the activation code.
- 4. Click Activate.

Step 4. Set up super administrator account

1. In the **Basic** section, enter the information of the super administrator account.

Note:

Save the username and password of the super administrator account, or you need to reset your system to reconfigure the account and log in to the PBX.

- Username: Specify the username that is used to log in to PBX web portal.
- Password: Specify the password that is used to log in to PBX web portal.
- Repeat the password: Repeat the password to confirm.
- Email Address: Enter the email address of the super administrator.

The email address can be used to receive system notifications and reset web login password.

- **Mobile Number**: Enter the mobile number that can be used to receive system notifications.
- 2. In the **Event Notifications** section, configure event notifications for the super administrator.
 - Send Event Notifications to PBX Administrator: Decide whether to enable notifications for the super administrator or not.
 - Contact Name: Enter the name of the super administrator.

Note:

This name helps you identify the super administrator from the Notification Contacts list.

- Notification Level: System notifications are divided into different levels according to importance. You can select notification levels to filter and receive the relevant notifications.
- Notification Method: Select method(s) to receive notifications.
- 3. Click Next.

Step 4. Configure the system time

1. In the **Date and Time** section, configure the time zone and daylight saving time, and set up the date and time manually or synchronize with an NTP server.

Note:

To synchronize system time with an NTP server, make sure that the PBX can access the Internet.

2. In the **Display Format** section, select the display format for date and time.

3. Click Next.

Step 5. Localize and customize the system

1. In the **System Prompt Language** section, select the radio button beside a system prompt to set it as the default system prompt.

Note:

Click **Download Online Prompts** to download more prompts.

- 2. In the **Other Settings** section, adjust the following settings for your local installation.
 - Notification Email Language: Select which language of email contents to be received.
 - Device Name: Specify a name for the PBX system.
 - Name Display Format: Select the display format for Extension User's Name and Contact Name.
 - **Tone Region**: Select your country/region or the nearest neighboring country/region to enable the default dial tone, busy tone, ring tone for your region.
 - Enable Allowed Country/Region Code Dialing Protection: To restrict users from making international calls, enable this option. When enabled, users can not make international calls to any countries or regions.
 - International Dialing Code: Enter the prefix of international call according to your country.

When a user tries to call a number starting with the prefix, the PBX's outbound route will identify this call as an international call.

3. Click **Next** to view the summary.

Step 6. Check and confirm the configurations

- 1. Check all the configured settings on the **Summary** page.
- 2. To edit the configurations of a specific step, click \checkmark beside the step title.
- 3. To edit the configurations of the previous step, click **Re-configure**.
- 4. If all the configurations are confirmed, click **Reboot** to take effect.

Result

All the configurations take effect after the system reboots.

You need to access the new IP address of the PBX and log in to Yeastar Management Portal by the super administrator username and password.

Note:

For PBX system installed on a virtual machine or an on-premise server, the IP address of your PC must be on the same network segment as that of the PBX, or you cannot access the PBX.

Set up Yeastar P-Series Cloud Edition

Before migrating 3CX data to Yeastar PBX, you need to set up Yeastar PBX in advance. This topic describes how to set up Yeastar P-Series **Cloud Edition**.

Step 1. Activate Yeastar P-Series Cloud Edition

Note:

Before activation, make sure that you have received the welcome email of Yeastar P-Series Cloud Edition.

1. In the welcome email, click the **PBX Activation URL** to enter the PBX activation page.

Step 1: Activate Your PBX System			
Please login to your PBX and use the activation code & activation URL listed			
below to activate your PBX and create a super administration account! Please			
note that the activation code can only be used once.			
PBX Login URL: https:// .yeastarcloud.com PBX Activation Code: BWtGrDg9			
PBX Activation URL:			
https:// .yeastarcloud.com/activation?			
code=5G9YEzXzkhfPsDEOGNYIMfHIVSDaVRtXRcWKgUEhx6D2eoIJFGTr			
U2n07qBtGK9u			

2. In the **Activation Code** field, enter the PBX activation code provided in the welcome mail.



Note:

The PBX activation code can only be used once.

† Yeastar	English
	Activation code below. (Activation Code) Confirm
	Copyright © 2006-2021 Yeastar Information Technology Co., Ltd.

3. Click Confirm.

Step 2. Set up super administrator account

1. In the **Basic** section, specify the information of the super administrator account.

Note:

Save the username and password of the super administrator account, or you need to reset your system to reconfigure the account and log in to the PBX.

- Username: Specify the username that is used to log in to PBX web portal.
- Password: Specify the password that is used to log in to PBX web portal.
- Repeat the password: Repeat the password to confirm.
- Email Address: Enter the email address of the super administrator.

The email address can be used to receive system notifications, reset web login password, and log in to the administrator portal.

- **Mobile Number**: Enter the mobile number that can be used to receive system notifications.
- In the Event Notifications section, configure event notifications for the super administrator.
 - Send Event Notification to PBX Administrator: Decide whether to enable notifications for the super administrator or not.
 - Contact Name: Enter the name of the super administrator.

Note:

This name helps you identify the super administrator from the Notification Contacts list.

- **Notification Level**: System notifications are divided into different levels according to importance. You can select notification levels to filter and receive the relevant notifications.
- Notification Method: Select method(s) to receive notifications.
- 3. Click Next.

Step 3. Configure the system time

- 1. In the **Date and Time** section, configure the time zone and daylight saving time.
- 2. In the **Display Format** section, select the display format for date and time.
- 3. Click Next.

Step 4. Localize and customize the system

- 1. In the **System Prompt Language** section, select the radio button beside a system prompt to set it as the default system prompt.
- 2. In the **Other Settings** section, adjust the following settings for your local installation.
 - Notification Email Language: Select which language of email contents to be received.
 - Device Name: Specify a name for the PBX system.
 - Name Display Format: Select the display format for Extension User's Name and Contact Name.
 - **Tone Region**: Select your country/region or the nearest neighboring country/region to enable the default dial tone, busy tone, ring tone for your region.
 - Enable Allowed Country/Region Code Dialing Protection: To restrict users from making international calls, enable this option. When enabled, users can not make international calls to any countries or regions.
 - International Dialing Code: Enter the prefix of international call according to your country.
- 3. Click **Next** to see the summary.

Step 5. Check and confirm the configurations

- 1. Check the all the configured settings on the **Summary** page.
- 2. To edit the configurations of a specific step, click \checkmark beside the step title.
- 3. To edit the configurations of the previous step, click **Re-configure**.
- 4. If all the configurations are confirmed, click **Reboot** to take effect.

Result

All the configurations take effect after the system reboots.

You need to access the domain name of the PBX and log in to Yeastar Management by the super administrator username and password.

Migrate Users and Configuration Data

Import Users and Contacts

Import 3CX Users to Yeastar PBX

Yeastar provides a user data conversion tool tailored for seamlessly migrating user (extension) data from 3CX to Yeastar. You can effortlessly export 3CX user data to a local file, convert it into a format compatible with the Yeastar P-Series Phone System, and then import the file into Yeastar PBX, facilitating a seamless bulk import of user (extension) information.

Step 1. Export user data from 3CX

- 1. Log in to 3CX Management Console, go to Users
- 2. Export users accordingly:
 - To export all users, click Export.
 - To export specific users, select the desired ones and click Export.

A csv file that contains information of all selected users are saved to your computer.

Step 2. Convert the 3CX user data for compatibility

- 1. Download the PBX Migration Tool.
- 2. Double click **PBX Migration Tool.exe** to launch the migration tool.
- 3. Click (b) to select the folder where the exported 3CX user data file is located.



- 4. Click **Generate** to generate files that encapsulate 3CX user data in a format compatible with Yeastar P-Series Phone System.
- 5. Click 🖻 to view the generated files.



The generated files are named as **pae_pse_extensions_xxx.csv** and **pce_exten-sions_xxx.csv**.

s 3cx_extensions.csv	2024/3/1 16:07	XLS	
s pae_pse_extensions_1710745634996.csv	2024/3/18 15:07	XLS	
s pce_extensions_1710745635001.csv	2024/3/18 15:07	XLS	

Step 3. Import user data to Yeastar PBX

- 1. Log in to Yeastar PBX management portal, go to **Extension and Trunk > Extension**.
- 2. Click Import.

; Yeastar	Ξ		
O Indicard	Extension and Trunk / Extension		
R Extension and Trunk ∧			
Extension	Add ∨ ∠ Edit Fimport Export E Linkus Server		
Extension Group	Online Status Presence		

3. In the pop-up window, upload the user data file.



- a. Click **Browse** to select the generated file according to your PBX edition.
 - For P-Series Software Edition, select pae_pse_extensions_xxx.csv.
 - For P-Series Cloud Edition, select **pce_extensions_xxx.csv**.
- b. Click Import.

Result

The user (extension) data in the file are imported to Yeastar Phone System and displayed in the **Extension** list.

Import 3CX Contacts to Yeastar PBX

Yeastar provides a data conversion tool tailored for seamlessly migrating contacts from 3CX to Yeastar. You can effortlessly export 3CX contacts to a local file, convert it into a format compatible with the Yeastar P-Series Phone System, and then import the file into Yeastar PBX, facilitating a seamless bulk import of contacts.

Step 1. Export contacts information from 3CX

- 1. Log in to 3CX Management Console, go to Advanced > Contacts.
- 2. Export contacts accordingly:
 - To export all contacts, click **Export**.
 - To export specific contacts, select the desired ones and click Export.

A csv file that contains information of all selected contacts are saved to your computer.

Step 2. Convert the 3CX contacts for compatibility

- 1. Download the PBX Migration Tool.
- 2. Double click **PBX Migration Tool.exe** to launch the migration tool.
- 3. Click ^(b) to select the folder where the exported 3CX contacts file is located.

-	Yeastar	X	
3CX Extensions		P Series Extensions	
Contacts	ý	Contacts	

- 4. Click **Generate** to generate a file that encapsulates 3CX contacts information in a format compatible with Yeastar P-Series Phone System.
- 5. Click 🖻 to view the generated file.



The generated files are named as **p_contacts_xxx.csv**.

s contacts.csv	2024/3/18 15:56	XLS	
s p_contacts_1710748620935.csv	2024/3/18 15:57	XLS	

Step 3. Import contacts data to Yeastar PBX

- 1. Log in to Yeastar PBX management portal, go to Contact > Company Contacts.
- 2. Click Import.



3. In the pop-up window, upload the user data file.

Import Contacts	Х
Please import a .csv file that uses UTF-8 encoding. If the file is not presented in the system, this phonebook will be created PBX. Click Here to view the file format requirement.	contains a phonebook that d automatically on the
* Choose a File	Browse
	X Cancel

- a. Click **Browse** to select the generated file.
- b. Click Import.

Result

The contacts information in the file are imported to Yeastar Phone System and displayed in the **Company Contacts** list.

Replicate Basic System Settings

Replicate Settings of Business hours & holidays

Replicate settings of global working hours and holidays from 3CX to Yeastar Phone System.

Replicate global business hours

1. View the existing settings on 3CX Management Console.



- a. Go to **Settings > Advanced > Language & Office Hours**.
- b. In the **Configure Office Hours** section, view the global business hours, break hours, and workdays on 3CX.
- 2. Create a global business hours on Yeastar Management portal.

*	Yeastar	E		
0	Dashboard	Call Control / Business Hours and Holidays		
R⊧	Extension and Trunk 🗸 🗸	Business Hours Holidays		
₽	Contacts Y	Time Settings		
		b ⊕ Add Till Delete Business Hours		
18	Auto Provisioning 🛛 🗸 🖌	Start Time End Time	ne O	Operations
111	Call Control ^	en la companya de la comp		
	Inbound Route	bba+		
		Break Hours		
	Outbound Route	Start Time End Tir	me O	Operations
	AutoCLIP Route	> No.000		
a	Business Hours and Holidays	109		
	Farmer Musel	T AGG		
	Emergency Number	Date Settings		
		Days of Wree, Advanced Options Al Sonday Monday Truesday Wednesday Thu	rsday 📄 Priday 📄 Saturday	

- a. Go to Call Control > Business Hours and Holidays.
- b. In the **Business Hours** tab, click **Add**.
- 3. Replicate the 3CX settings on Yeastar PBX.

a. Copy settings for workdays.

			3CX					🕂 Yeastar	
Configure Office H	ours						Time Settings		
Configure System V	Vide In Office Hours an	rd Break times. Calls w	vill be routed accordin	ngly.			Business Hours		
Office Hours							Start Time	End Time	Operations
Monday 09:00 - 18:00	Tuesday 09:00 - 18:00	Wednesday 09:00 - 18:00	Thursday 09:00 - 18:00	Friday 09:00 - 18:00	Saturday Configure	Sunday Configure	Select time ()	Select time ()	Ð
Configure	Configure	Configure	Configure	Configure				+ Add	
Break times			Ŷ				Break Houre		
Monday 12:00 - 14:00	Tuesday 12:00 - 14:00	Wednesday 12:00 - 14:00	Thursday 12:00 - 14:00	Friday 12:00 - 14:00	Saturday Configure	Sunday Configure	Start Time	End Time	Operations
Configure	Configure	Configure	Configure	Configure			Select time ()	Select time 🕓	Ō
								+ Add	
							Date Settings		
							Days of Week Advanced Opt	ions	1
				~			. All		
				Copy sett	ings of wo	orkdays –	Condex Mandex	Turandari 🖉 Wadaaadari 🔽 Thurandari 📝 Eridari	Caturday
							- contraty Montady M	riceaury Ministrativy Ministrative Pricary	Gunurday

b. Copy settings for office hours and break times.

			3CX					💤 Yeastar	
Configure Office H	ours					- Conv o	Time Settings		
Configure System W	lide In Office Hours ar	id Break times. Calls v	ill be routed accordin	gly.		copy o	Business Hours		
Office Hours							Start Time	End Time	Ope
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	09:00 🕓	18:00 🕓	ø
09:00 - 18:00 Configure	Configure	Configure		+ Add					
Break times							Break Hours		
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Start Time	End Time	Oper
12:00 - 14:00	12:00 - 14:00	12:00 - 14:00	12:00 - 14:00	12:00 - 14:00	Configure	Configure	12:00 ()	14:00 🕓	÷
Configure	Configure	Configure	Configure	<u>Configure</u>				+ Add	
							Date Settings		
						Copy br			
							Days of Week Advanced Options		
							 All 		
							Sunday 🛃 Monday 🛃 Tues	day 🔽 Wednesday 🔽 Thursday 💟 Friday 🗌 Saturday	

Note:

If different workdays are specified with varying business and break times in the 3CX settings, you can add multiple time groups on Yeastar PBX to achieve equivalent functionality.

c. Click **Save** and **Apply**.

Copy holiday settings

1. View the existing settings on 3CX Management Console.



a. Go to **Settings > Advanced > Language & Office Hours**.

b. In the **Configure Holidays** section, select a holiday to view its details.

2. Create holidays on Yeastar Management portal.

† Yeastar	E
⑦ Dashboard	Call Control / Business Hours and Holidays
S = Extension and Trunk ∽	Business Hours b Holidays
E Contacts Y	
Auto Provisioning ~	Or Add I → Import → Export → Delete
tt Call Control	
Inbound Route	
Outbound Route	
AutoCLIP Route	
a Business Hours and Holidays	
Emergency Number	

- a. Go to Call Control > Business Hours and Holidays.
- b. Select the **Holidays** tab, then click **Add**.
- 3. Replicate the 3CX settings on Yeastar PBX.

3CX	🛟 Yeastar
Configure Holidays ×	
In addition to office hours and days of the week, you can define specific dates as public holidays, so that these dates will be considered out of office hours as well	Basic
Name	* Name
New Year	New Year a
Single Day v 1 v January v Every Year v 14:00-18:00	··································
O O Prompt: Format WAV (PCM, 8 kHz, 16 bit, Mono, Max size: 100MB)	
new_year_greeting.wav + Add @Record III Manage	For one-time holidays, select By Date
O Information: If no prompt is selected, the default "Out of office IVR" (HOL) will be triggered for salls on this holiday.	* Holiday Type For annual holidays, select By Month
OK Caval	> By Month V
	* Date
	01/01 14:00 ~ 01/01 18:00 📋 💽
	Promot

- a. In the **Name** field, copy the holiday name.
- b. In the Holiday Type drop-down list, specify the holiday's recurring cycle.
 - For one-time holidays, select **By Date**.
 - For annual holidays, select **By Month**.
- c. In the **Date** field, specify the date and time for the holiday.
- d. In the **Prompt** drop-down list, select the desired prompt.

e. Click Save and Apply.

4. If there are other holiday settings in 3CX, Repeat step 2~3.

Upload Voice Prompt Files

This topic describes how to upload audio files for voice prompts to Yeastar Phone System, including custom prompt and Music on Hold (MoH).

Prerequisites

- You have obtained the audio files for voice prompt from your client.
- Make sure that the audio files to be uploaded meet the following requirements:

Item	Requirements
File Format	.wav, .mp3, or .gsm • PCM, 8K, 16bit, 128kbps • A-law(g.711), 8k, 8bit, 64kbps • u-law(g.711), 8k, 8bit, 64kbps
	<i>i</i> Tip: If file format does not meet the requirement, you can convert audio files via WavePad or G711 File Converter online.
File Size	Up to 8 MB

Upload a custom prompt

- 1. Log in to PBX Management Portal.
- 2. Go to **PBX Settings > Voice Prompt > Custom Prompt**, and click **Upload**.

💤 Yeastar		Œ			🔐 (? 🖻 🖵
RE Extension and Trunk	×	PBX Settings / Voice Prom	pt		
Contacts	×	Prompt Preferences	System Prompt	Music on Hold	Custom Prompt
Auto Provisioning	×				
III Call Control	×	(+) Record New	oad 🔟 Delete		
Call Features	×	Name			-
PBX Settings	^				
Paternas					No Data
Voice Prompt					NO DAIL
of the logs					

3. In the pop-up window, select an audio file from your local PC and click **Upload**.

Upload MOH prompts

Step1. Add a MoH playlist

- 1. Log in to PBX Management Portal.
- 2. Go to **PBX Settings > Voice Prompt > Music on Hold**.

🛟 Yeastar		Ē			Apply	?	Fn
RE Extension and Trunk	×	PBX Settings / Voice Prom	pt				
D Contacts		Prompt Preferences	System Prompt	Music on Hold	Custo	m Prom	ot
Auto Provisioning	*	• Create New Playlist		4			
211 Call Control							
1 Call Features		Playlist Name	Playlist Type	Play O	rder		
		default	Local Audio	Rando	m		
B PBX Settings	^						
Pallerences							
Voice Prompt							

3. Create a new playlist.

Settings / Voice Prom	ipt			
Prompt Preferences	System Promp	Music on Hold	Custom Prompt	
⊕ Create New Playlist	a c	eate New Playlist		×
Playlist Name	Playli	Plavlist Type		usic URL
default	Local	ocal Audio		~ 1
	*	Playlist Name		
	_	Sample		
	*	Play Order		
		Random		~
			× Cancel	🕞 Save 🧲

- a. Click Create New Playlist.
- b. In the pop-up window, configure the playlist.
 - Playlist Type: Select Local Audio.
 - Playlist Name: Enter a name to help you identify it.
 - **Play Order**: Decide whether to play the playlist alphabetically or randomly.
- c. Click Save.
- 4. Add one or more audio files to the playlist.
 - a. Select the created playlist, click 🔤.

System Prompt	Music on Hold	Custom Prompt	
Playlist Type	Play Order	Streaming Music URL	Operations
Local Audio	Random		🔤 🖉 🗇
	System Prompt Playlist Type Local Audio	System Prompt Music on Hold Playlist Type Play Order Local Audio Random	System Prompt Music on Hold Custom Prompt Playlist Type Play Order Streaming Music URL Local Audio Random -

- b. In the pop-up window, click **Upload**.
- c. Click **Browse** to choose the desired audio file, then click **Upload**.
- d. Optional: To add more audio files, repeat step b-c.

The uploaded audio files are displayed on the **MoH Files** list.

5. Click **Apply**.

Step2. Change the system MoH playlist

Prompt Preferences			
Music on Hold		* Music on Hold for Call Forwarding	
Sample	\sim	Music on Hold	\sim
Invalid Phone Number Prompt		Busy Line Prompt	
[None]	\sim	[None]	\sim
Call Failure Prompt		Event Notification Prompt	
[None]	\sim	[Default]	\vee

- 1. Click Prompt Preferences tab.
- 2. In the **Music on Hold** drop-down list, select the desired playlist.
- 3. Click **Save** and **Apply**.

Replicate Settings of CALL Features

Replicate Settings of Ring Groups

This topic describes how to replicate settings of ring groups from 3CX to Yeastar Phone System.

Procedure

1. View the existing settings on 3CX Management Console.

Go to **Ring Groups** and select a ring group to view its details.

≡	3CX			
-di	Dashboard	Ring Groups		() Help
1	Users			
2	Phones	Ring Groups		
0	SIP Trunks	+ Add Ring Group	ne 🖍 Edit 🗙 Delete	
+	Inbound Rules			
+	Outbound Rules	Search		
Q	Digital Receptionists	Ext. Name	Туре	
쑵	Ring Groups	■ 620 Support	RingAll	×
忠	Call Queues	801 Pre-Sale	RingAll	×
	Backup and Restore	Sales	Hunt	×

2. Create a new ring group on Yeastar Management Portal.
| 🕂 Yeastar | | Œ |
|-----------------------|---|---|
| R Extension and Trunk | * | Call Features / Ring Group |
| ⊥ ⊧ Contacts | ~ | ► O Add T Delete |
| 🔚 Auto Provisioning | ~ | |
| țț‡ Call Control | ~ | Number \Leftrightarrow Name \Leftrightarrow Members |
| Call Features | ^ | |
| Voicemail | | |
| Feature Code | | |
| IVR | | |
| a Ring Group | | |

a. Go to **Call Features > Ring Group**.

b. Click **Add**.

3. On Yeastar Management Portal, replicate the ring group settings from 3CX.



- a. Copy the basic information of the ring group.
- b. In the Members section, select the corresponding extensions.
- c. In the **Failover Destination** drop-down list, set how to handle unanswered calls accordingly.
- d. Click Save and Apply.
- 4. If there are multiple ring groups in 3CX, repeat step 2~3.

Replicate Settings of Digital Receptionist (IVR)

This topic describes how to replicate settings of digital receptionists (IVR) from 3CX to Yeastar Phone System.

Restrictions

Only support replicating settings of **Standard**-type digital receptionists.

Procedure

1. View the existing settings on 3CX Management Console.

Go to **Digital Receptionists** and select a digital receptionist to view its details.

≡	3CX									
-di	Dashboard	Digital Recept	igital Receptionists							
1	Users	0 1								
2	Phones	Digital Receptionis	Digital Receptionists							
0	SIP Trunks	+ Add	ten Mari							
+	Inbound Rules		** belete							
+	Outbound Rules	Search								
Q.	Digital Receptionists	Ext.	Name	Туре						
쓭	Ring Groups	⁶⁵⁰ راس	Break Hours	Standard	×					
*	Call Queues	804	Business Hours	Standard	×					

2. Create an IVR on Yeastar Management Portal.

† Yeastar	Œ
R= Extension and Trunk	✓ Call Features / IVR
E Contacts	
🔚 Auto Provisioning	
↓†↓ Call Control	*
Call Features	~
Voicemail	
Feature Code	
aIVR	

- a. Go to Call Features > IVR.b. Click Add.
- 3. On Yeastar Management Portal, replicate the IVR settings from 3CX.

	3 CV					f Yeastar	
					Barlan Kar David Frank		
					Basic Ney Press Event		
					* Number	* Name	
name					650	Break Hours	
Linua					Promot	Promot Repeat Count	
nours					break_hours_prompt.wav ×	× 3	
on					Barrant Timered (a)	a Disk Timerut (s)	
					* Response Timeout (s)	* Digit limeout (s)	
					3	÷ 3	
					IVR Alert Info		
dard				~			
					Dial Extensions		
Forma	at WAV (PCM, 8 kHz, 16 bit, Mono, Max size: 10	JOMB)			Disabled		
<_hours	s_prompt.wav	~ + /	Add 🛛 Record 📰	Manage	Dial Outbound Routes		
lecenti	onist Language				Dial to Check Voicemail		
coepac	una congodge					Retain default values fo	r other
fard En	iglish Prompts Set			~	Dial #9 to Modify IVR Prompt		n as needed
ptions	5					🕂 Yeastar	
	Action		Destination		Basic Key Press Event	_ 🕒	
	Connection Entropy		20001 - 0.1		C Im	-	
	Connect to Extension	Ý	2000 Leo Ball		Press 0		v
	red cell				Destination		
	End Call	Ŷ,			Extension	V 2000-Leo Ball	~]
	Nothing	~					
	Houming				Allow Opt-out of Call Reco	raing	
	Nothing	~					
					Press 1		~
	Nothing	~			Destination		
					Hang Up	VI 0	
	Nothing	~					
	Nothing	~			Press 2	í.	~
					Destination	\ \	
	Nothing	~			[None]	v	
							0
	Nothing	~			Press 3	Mappin	a Table
	Nething					ЗСХ	
	nouning	~			Press 4	Nothing	
						End Call	
					Press 5	Connect to Extension	
					Brees 6	CONNECT TO EXTENSION	
ıbound	d Dialing (DID)				Press o	Connect to Ding Crows	
nbound	d Dialing (DID)					Connect to Ring Group	
nbound Ily assit	d Dialing (DID) gn a DID to receive calls directly to this extens	sion			Press 7	Connect to Ring Group Connect to Queue	
nbound Ily assi	d Dialing (DID) 'gn a DID to receive calls directly to this extens	sion			Press 7	Connect to Ring Group Connect to Queue Connect to Digital Receptionist	
nbound Ily assij	d Dialing (DID) ign a DID to receive calls directly to this extens	sion			Press 7 Press 8	Connect to Ring Group Connect to Queue Connect to Digital Receptionist Transfer to Voicemail	Exte
nbound Ily assig ID/DDI	d Dialling (DID) ign a DID to receive calls directly to this extens	sion			Press 7 Press 8	Connect to Ring Group Connect to Queue Connect to Digital Receptionist Transfer to Voicemail Call By Name	Exte
bound y assij	d Dialing (DID) ign a DID to receive calls directly to this extens	sion			Press 7 Press 8 Press 9	Connect to Ring Group Connect to Queue Connect to Digital Receptionist Transfer to Voicemail Call By Name Repeat Prompt	Exte I Play Pron
ibound Ily assig ID/DDI	d Dialing (DID) ign a DID to receive calls directly to this extens i r invalid or no DTMF input	sion			Press 7 Press 8 Press 9	Connect to Ring Group Connect to Queue Connect to Digital Receptionist Transfer to Voicemail Call By Name Repeat Prompt Play Prompt and Exit	Exte I Play Pron Play
ibound Ily assig ID/DDI tion fo	d Dialing (DID) ign a DID to receive calls directly to this extens invalid or no DTMF input	sion			Press 7 Press 8 Press 9 Press #	Connect to Ring Group Connect to Queue Connect to Digital Receptionist Transfer to Voicemail Call By Name Repeat Prompt Play Prompt and Exit	Exte Play Pron Play
bound ly assip D/DDI ion fo	d Dialing (DID) ign a DID to receive calls directly to this extens r invalid or no DTMF input in seconds:	sion			Press 7 Press 8 Press 9 Press # Press #	Connect to Ring Group Connect to Queue Connect to Digital Receptionist Transfer to Voicemail Call By Name Repeat Prompt Play Prompt and Exit	Exte Play Pron Play
nbound illy assig iD/DDI tion fo ut with	d Dialing (DD) ign a DID to receive calls directly to this extens in invalid or no DTMF input in seconds:	sion			Press 7 Press 8 Press 9 Press # Press *	Connect to Ring Group Connect to Digital Receptionist Transfer to Voicemail Call By Name Repeat Prompt Play Prompt and Exit	Exte Play Pron Play >
nbound illy assign tion fo ut with	d Dialing (DID) ign a DID to receive calls directly to this extens r invalid or no DTMF input iln seconds:	sion			Press 7 Press 8 Press 9 Press # Press * Response Timeout	Connect to Ring Group Connect to Queue Connect to Digital Receptionist Transfer to Voicemail Call By Name Repeat Prompt Play Prompt and Exit	Exte Exte Play Pron Play >
nbound illy assign tion fo ut with	d Dialing (DID) ign a DID to receive calls directly to this extens rinvalid or no DTMF input Nn seconds:	sion		~	Press 7 Press 8 Press 9 Press # Press * Response Timeout	Connect to Ring Group Connect to Queue Connect to Digital Receptionist Transfer to Voicemail Call By Name Repeat Prompt Play Prompt and Exit	Exte Exte Play Pron Play >
bound ly assign o/DOI ion fo it with all invali	d Dialing (DD) ign a DID to receive calls directly to this extense ir invalid or no DTMF input thin seconds: 	sion			Press 7 Press 8 Press 9 Press # Press * Response Timeout Invalid Input Destination	Connect to Ring Group Connect to Digital Receptionist Transfer to Voicemail Call By Name Repeat Prompt Play Prompt and Exit	Exte Exte Play Pron Play > >

- a. Copy IVR's name, extension, and prompt.
- b. Select the Key Press Event tab.
- c. Set the key press events accordingly.
- d. Set the invalid input destination accordingly.
- e. Click Save and Apply.
- 4. If there are multiple digital receptionists (IVRs) in 3CX, repeat step 2~3.

Replicate Settings of Call Queues

This topic describes how to replicate settings of call queues from 3CX to Yeastar Phone System.

Procedure

1. View the existing settings on 3CX Management Console.

Go to **Call Queues** and select a queue to view its details.

≡	3CX		
dt	Dashboard	Call Queues	
1	Users		
	Phones	Call Queues	
Ø	SIP Trunks	+ Add ✓ Edit X Delete	
ŧ	Inbound Rules		
Ť	Outbound Rules	Search	
\bigcirc	Digital Receptionists	Ext. Queue Name	Polling Strategy
<u>101</u>	Ring Groups	800 Tech Support	Round Robin
惠	Call Queues	803 Cusomer Service	Round Robin
	Backup and Restore	808 Sales	Prioritized Hunt

2. Create a call queue on Yeastar Management Portal.

† Yeastar	E	🔐 ? Fn 🖵 🗸
	Call Features / Queue	
ļț‡ Call Control	*	
Call Features	∧ b	
Voicemail		
Feature Code		
IVR		
Ring Group		
a Queue		

- a. Go to **Call Features > Queue**.
- b. Click **Add**.
- 3. On Yeastar Management Portal, replicate the call queue settings from 3CX.

a. In the **Basic** and **Preferences** tabs, copy general settings for the queue.



b. In the **Members** tab, select agents for the queue.

	3CX.				7 : Y	éastar		
eral Agents Advanced	d Notifications Click2Talk			Members			-	
all Queue Agents				Dynamic Agents				
alast which automisms will be a	mente festileis Call Oceane. Unes musice	lee lasie te the Call Queue te stast tabi	ing calls	10 items	Available		3 items	Selected
+ Add X Delete 2 Nove Up	p 3 Move Down	(Count: 3, Selected: 0	Search here			Search here	
Search				Extension Number	r Caller ID Name		Extension Nur	nber Caller ID Name
				2003	Dave Haris		2000	Leo Ball
Ext.	First Name	Last Name		2004	Troy Daniel		2001	Philip Huff
2000	Leo	Ball	×	2005	Kristin Hale		2002	Terrell Smith
2001	Dhillio	u		2006	Naomi Nichols			
2001	Philup	num	× 0	2007	Ashley Gardner			
2002	Terrel	Smith	×	2008	Jaime Hart			
			lesses and les					

c. In the **Basic** and **Preferences** tabs, copy advanced settings for the queue.



d. In the **Members** tab, select queue manager and set queue email notifications acordingly.



- e. Click Save and Apply.
- 4. If there are multiple call queues in 3CX, repeat step $2\sim3$.

Replicate Settings of Voicemail

This topic describes how to replicate settings of voicemail from 3CX to Yeastar Phone System.

Section

1. View the existing settings on 3CX Management Console.

Go to Settings > System > Voicemail



2. View the default voicemail settings on Yeastar Management Portal.



- a. Go to Call Features > Voicemail.
- b. Select the Voicemail Settings tab.
- 3. On Yeastar Management Portal, replicate the voicemail settings from 3CX.

	3CX				👬 Yea	istar
Voicemail Menu				Group Voicemail V	oicemail Settings	
Voicemail Menu Extension Number						
999				Caller Options		
Do not save Voicemails that are less than (seconds)				Allow callers to press) to break out from ve	bicemail
2			o	Allow callers to dial ex	tension	
				Allow callers to that ex	tenaton	
Voicemail				Ask callers to press 5	for leaving a message	2
Current Quota and Used Space				Allow callers to review	message	
Voicemail quota, Gb	Used space					
5	219.1 MB			Message Options		
Cleaning Options				 Max Message Time (s) 		 Min Message Time (s)
Delete all users' voicemails from system	Delete All			600	~	2
Automatically delete all Voicemails older than:	60 days	0				
Email Notification				Greeting Options		
Send email when size of Voicemail folder reaches:	75 % of quo	ta		 Max Greeting Time (s) 		 Global Voicemail Greeting
				60	\sim	[Default] V
				Voicemail Auto Cleanup	5	
				Please configure in the Aut	o Cleanup.	
				 Max Number of Voicema 	ils .	★ Max Preservation Days
						60

4. Click **Save** and **Apply**.

Replicate System Security Settings

Replicate Settings of Allowed Country Code

This topic describes how to replicate the settings of allowed country code(s) from 3CX to Yeastar Phone System.

Procedure

1. View the existing settings on 3CX Management Console.

≡	3CX			-		
dı	Dashboard	Allowed Country Codes OK Cancel			Help	
Ŧ	Users					
2	Phones	Select the region or country to which calls are allowed.				
0	SIP Trunks	North America			~	
÷	Inbound Rules					
t	Outbound Rules	South America			•	
Q	Digital Receptionists					
쓥	Ring Groups	Europe			~	
坐	Call Queues					
	Backup and Restore	Middle East			*	
:=	Reporting 😽					
U	Security	Asia and the Middle East			*	
	Anti-Hacking					
Q	Allowed Country Codes	Arrica			•	
¢.	Blacklisted Numbers	Australia			~	

Go to **Security > Allowed Country Codes** and select a region to view which countries are allowed.

2. Enable Allowed Country Code Dialing Protection on Yeastar Management Portal.

🕂 Yeastar		≘				() Fa	🖵 🗸 🥑 Availablev	Number or Name	
R Extension and Trunk	~	Security / Se	ecurity Settir	igs					
E Contacts	~	Security	Options	Console/SSH Acce	ess Certifica	ites	Allowed Country IPs	b Allowed Countr	ry Codes
Auto Provisioning	~								
11 Call Control	~	•	Enable Allow	ed Country/Region	Code Dialing Prote	ection			
😋 Call Features	~	4 Inter	national Dialing	Code					
Messaging	~	⊘ A	low 🛞 Disal	low					Search
PBX Settings	Ý		Country/Reg	ion Code 🍦	Country/Region 👙		Continent 💠	Operat	tions ¢
System System	~		1		Canada (CA)		North America	0-	
Security	^		1		United States of Am	nerica (US)	North America	—	
Security Rules			1-242		Bahamas (BS)		South America	0-	
a Security Settings			1-246		Barbados (BB)		South America	0-	
Security Settings			1-264		Anguilla (Al)		South America	0-	

- a. Go to **Security > Security Settings**.
- b. Select the Allowed Country Codes tab.
- c. Turn on the switch **Enable Allowed Country/Region Code Dialing Protec-tion**.
- d. In the **International Dialing Code** field, enter the prefix of international call according to your country.
- 3. On Yeastar Management Portal, replicate the allowed country code settings from 3CX.

3CX			;; Ye	eastar	
Select the region or country to which calls are allowed.		-		-	Allowed Country Codes
North America	~	- Enable Allow	red Country/Region Code Dialing Protection		
South America	~	International Dialing O O Allow S Disc	g Code		994
Europe	~	Country/Re	gion Code 😄 Country/Region 😄	Continent ¢	Operations ¢
Middle East	~	994	AZerbaijan (AZ)	Asia	&_;
Asia and the Middle East	^		Tip Sea	rch for specific country co	de, country name, region code, i
Alghanistan (93)			and	continent name to filter or	it the desired data.
Azerbaijan (994)	o				
Bahrain (973)					
Bangladesh (880)					

- a. Search for the desired country/region code.
- b. In the **Operations** column, set the status to -•.
- c. Click Save and Apply.

Replicate Settings of Blacklisted Numbers

This topic describes how to replicate blocked incoming caller ID from 3CX to Yeastar Phone System.

Procedure

1. View the existing settings on 3CX Management Console.

	3CX			-
	Ring Groups	Blacklisted Numbers		
惠	Call Queues			
	Backup and Restore	Blacklisted Numbers		
	Reporting 💙	+ Add ✓ Edit ¥ Delete ± Import		
U	Security			
•	Anti-Hacking	Search		
Q	Allowed Country Codes	Blacklisted Caller ID	Description	
C	Blacklisted Numbers	5503301		
A	Console Restrictions			

Go to **Security > Blacklisted Numbers** to view the existing blocked numbers.

2. Create a new blocked number rule on Yeastar Management Portal.

;; Yeastar	Œ	 ?	Fn	₽ ~
Call Features	Call Features / Blocked/Allowed Numbers			
Conference	Blocked Numbers			
Speed Dial				
Paging/Intercom	● Add ► Import ← Export Delete			
Recording	Name Type			1
PIN List				
a Blocked/Allowed Numbers		N	o Da	ta

- a. Go to Call Features > Blocked/Allowed Numbers.
- b. In the **Blocked Numbers** tab, click **Add**.
- 3. On Yeastar Management Portal, replicate the settings from 3CX.



- a. In the Name field, specify a name for this blocked number rule.
- b. In the **Number** field, copy the blocked numbers from 3CX.
- c. In the **Type** drop-down list, select **Inbound**.
- d. Click Save.

Replicate Settings of IP Blacklist / Whitelist

This topic describes how to replicate the list of blocked or allowed IP addresses or IP address range from 3CX to Yeastar Phone System.

Procedure

1. View the existing settings on 3CX Management Console.

≡	3CX		Support → Updates →
꺌	Ring Groups	IP Blacklist	
惠	Call Queues		
	Backup and Restore	IP Blacklist	
=	Reporting 💙	+ Add ✓ Edit × Delete ★ Import ★ Export	
U	Security		
•	Anti-Hacking	Search	
0	Allowed Country Codes	IP Address Subnet Mask	Action
ر	Blacklisted Numbers	192.168.27.91	Allow
4	Console Restrictions	192.168.5.0 /24	Deny
0	IP Blacklist		
â	Secure SIP		

Go to **Security > IP Blacklist** and select a rule to view the existing blocked/allowed IP address or IP address range.

2. Create a new blocked/ allowed IP address rule on Yeastar Management Portal.



a. Go to **Security > Security Rules**.

b. In the **Static Defense** tab, click **Add**.

3. On Yeastar Management Portal, replicate the settings from 3CX.

• For single IP address rules, do as follow:

3CX		💤 Yeastar
Blacklist/Whitelist IP or Range of IP Addresses	×	Bacia
Specify an IP or range of IP addresses and configure appropriate action. <u>Click here for more</u> information.		A Isam Single IP Sample
Add single IP Address	~	* Action
Network address (Network ID)		Accept
192.168.27.91	0	Defense Object
Action		Object Type Source IP Address / Subnet Mask
Allow	v •	IP Address
Description		• Protocol Both V
Expiration Date	0	Tip or For rules with single IP address, enter255.255.255
^ ^		
2043-05-19 15 : 50		
× ×		

- a. In the **Name** field, specify a name for this rule.
- b. In the Action drop-down list, select the action according to 3CX setting.
- c. In the **Object Type** drop-down list, select **IP Address**.
- d. In the **Source IP Address / Subnet Mask/** field, copy the IP address and enter 255.255.255.255 as the subnet mask.
- For IP addresses range rules, do as follow:

3CX					💤 Ye	eastar		
Blacklist/Whitelist IP or Range of IP Addresses	×			Basic				
Specify an IP or range of IP addresses and configure appropriate action. <u>Click here for more</u> nformation.				Name IP Addresses Range Samp Action	e j	Description		
Add a range of IP Addresses	\sim			Polost				
Network address (Network ID)				- Treject				
192.168.0.0		o		Defense Object				
Subnet Mask				Object Type	0	Source IP Addres	s / Subnet Mask	0
/16	~	o	 , I	IP Address	~		/ 255.255.0.0	0
P address range				Service/Port Range	/	* Service		
192.168.0.0 - 192.168.255.255				Service		[None] V		
Action								
Deny	~	o					- 7-64-	
-					3CX	Yeastar	3CX	Yeastar
Jescription					16	255.255.0.0	25	255.255.255.12
					17	255.255.128.0	26	255.255.255.19
					18	255.255.192.0	27	255.255.255.22
					19	255.255.224.0	28	255.255.255.24
					20	255.255.240.0	29	255.255.255.24
					21	255.255.248.0	30	255.255.255.25
					22	255.255.252.0	31	255.255.255.25
					23	255.255.254.0	32	255.255.255.25
					24	255 255 255 0		

- a. In the **Name** field, specify a name for this rule.
- b. In the Action drop-down list, select the action according to 3CX setting.
- c. In the **Object Type** drop-down list, select **IP Address**.
- d. In the **Source IP Address / Subnet Mask/** field, copy the IP address from 3CX and enter the corresponding subnet mask.
- 4. If there are multiple IP blacklists or whitelists in 3CX, repeat step 2~3.

Set up Linkus Clients for Users

This topic describes how to set up Linkus clients for users, allowing them to make calls and utilize various Yeastar Phone System features through Linkus clients.

Background information

Depending on the edition of Yeastar P-Series Phone system, the required settings vary.

Yeastar P-Series Software Edition

- If users only need to use Linkus within the company's Local Area Network (LAN), you only need to Enable Linkus clients for users.
- If users need to use Linkus outside the company, you need to complete the following settings:
 - Set up Linkus Server
 - Enable Linkus clients for users

Yeastar P-Series Cloud Edition

Yeastar P-Series Cloud Edition provides a pre-configured Linkus server, enabling users to seamlessly access Yeastar phone system features from anywhere with internet access. All you need to do is Enable Linkus clients for users.

Set up Linkus Server

- 1. Log in to PBX management portal, go to System > Network.
- 2. Select the Yeastar FQDN tab, and turn on Yeastar FQDN.

🛟 Yeastar		Œ			🖵 🗸 🔮 Available 🗸
PBX Settings	×	System / Network			
System	^	< Service Parts	Yeastar FQDN	Public IP and Parts	Date Roots
Network					
Date and Time		Yeastar FQDN			

- 3. In the Fully Qualified Domain Name (FQDN) field, set up the FQDN domain name.
 - a. Select a domain name from the drop-down list.
 - b. Enter a host name in the first field.

Note:

Think twice before you enter the hostname. The FQDN can not be changed after you save the configurations.

For example, select domain name **ras.yeastar.com** and enter host name <code>yeas-tardocs</code>. You will get an FQDN **yeastardocs.ras.yeastar.com**.

- Yeastar FQDN			
Status	* Fully Qualified Domain Name	(FQDN)	
Disconnected	yeastardocs	ras.yeastar.com <	,
	⊙The domain name is available	2.	

4. Click Save and Apply.

Enable Linkus clients for users

- 1. Log in to PBX management portal, go to **Extension and Trunk > Extension**.
- 2. Select all users and click Edit.

🕂 Yeastar		< <u>-</u>	?? ()	Fn 🖵 🗸 🥑 Av	ailable~ N
R Extension and Trunk	^	Extension and Trunk / Extension			
Extension				nil 🗔 Delete	
Energie Drug			Welcome Link		
Class Parriates		Confine Status	Presence 🍦	Extension Number	Caller ID Name
Task			Available	2000	B Leo
D Conten	8	☑ 18 두 . =	 Available 	2001	👩 Phil
An Personny			Business Trip	2002	👰 Terr

3. Click Linkus Clients tab, then select Linkus.

<	Toosenat	Peakarea	Advanced	Security	Linkus Clients	Function Reps.
🔽 Linkus	74					
- Lini	kus Mobile Client					
Linkus Mob	ile Client Codec			ICE		
			\sim			\sim
- Lini	kus Pad Client (SDK)					
- Lini	kus Desktop Client					
	us Web Client					

4. Turn on the switch of the desired Linkus client(s).

- 5. Click **Save** and **Apply**.
- 6. Select all users and click Welcome Email.



All users will receive the Linkus welcome emails, which contain the login credential for Linkus Clients. After logging in, extension users can make and receive internal calls through Linkus clients.

What to do next

- Provide extension users with the relevant user guide to help them get started with Linkus clients and utilize the telephony features.
 - P-Series Software Edition: P-Series Linkus Software Edition Documentation
 - P-Series Cloud Edition: P-Series Linkus Cloud Edition Documentation

• Assign the **Administrator** role to the system administrator's extension account for management permissions, enabling them with a thorough understanding and control of Yeastar Phone System settings

; Yeastar	· 三
Continued	Extension and Trunk / Extension
R Extension and Trunk ∧	
Extension	Or Add ∨ Z Edit ⊡ Import ⊕ Export ⊟ Linkus Server ⊠ Welcome Email ⓓ Delete
Extension Group	Online Status Extension and Trunk / Extension / Edit Selected Extensions
Clerit Permission	
Truck	User Information
	Bulk Edit * User Password Generate Randomly User Role Administrator

Migrate SIP Trunks

Migrate SIP Trunks

This topic describes how to migrate your SIP trunks from 3CX to Yeastar Phone System.

Important: Migrating SIP trunks will disrupt the 3CX system's ability to make or receive external calls. Confirm the migration timing with your clients before proceeding. To minimize business disruption, it's recommended to perform SIP trunk migration during non-business hours.

Prerequisites

If the SIP trunk provides for migration are NOT listed in Yeastar ITSP Partners, you need to gather the following information of the SIP trunk provider for trunk registration.

- hostname /IP address
- Port

Procedure

1. View the existing SIP trunks on 3CX Management Console.

Go to **SIP Trunks** and select a trunk to view its details.

≡	3CX									
-di	Dashboard		SIP Trunks							
1	Users									
2	Phones		SIP Trunks							
0	SIP Trunks		+ Add SIP Trunk	+ Add gateway	+ Add WhatsApp	+ Add SBC	+ Add Bridge	🖌 Edit	× Delete	2 Enable All
÷	Inbound Rules		£ Export Provider	Push Config	C Update	- Add bbc	- Add bridge	, Luit		
+	Outbound Rules									
Q	Digital Receptionists		Search							
쓥	Ring Groups			lame	Host	Туре	Sir	n Calls	Ma	in Trunk No
忠	Call Queues	L	• • T	runk-Sample1	3cx.pstn.voxte	Provider	10		<u>330</u>) <u>5501</u> /
	Backup and Restore		<u> </u>	runk-Sample2	docs-	Provider	10		550	<u>)3301</u>)
=	Reporting	× .			autop.sgycm					

2. Create a new SIP trunk on Yeastar Management Portal.

🕂 Yeastar	E
Ø Dashboard	Extension and Trunk / Trunk
R Extension and Trunk ∧	
Extension	▶ 🕀 Add 🕞 Import 🗧 Export 🗇 Delete
Extension Group	
Client Permission	
a Trunk	
Role	

- a. Go to Extension and Trunk > Trunk.
- b. Click Add.
- 3. On Yeastar Management Portal, replicate the SIP trunk settings from 3CX.

3CX.			† Yeastar
eral DIDs Caller ID Options Inbound Parameters Outbound Paramete	rs SMS	< Basic	10x10x
runk Details		Basia	
inter name for Trunk		Dasic	•
Trunk-Sample1	•	* Name	a * Trunk Status
rgistrar/Server/Gateway Hostname or IP		Trunk-Sample1	Enabled
3cx.pstn.voxtelesys.net	Auto Discovery	Select ITSP Template	* ITSP
ithound Provi		United States	V Voxtelesys
3cx.pstn.voxtelesys.net 5060	Auto Discovery		
		Detailed Configuration	
umber of SIM Calls			
10		 Trunk Type 	 Transport
		Register Trunk	VUDP
athentication		Hostname/IP + Port	Domain
pe of Authentication		191100-1 V 5060	191100-148.voxtelesys.net
Register/Account based	~	Username	C Password
thentication ID (aka SIP User ID)		sEjkarPOnjd	sad
sEjkarPOnjd	o	Authenties News	
uthentication Password		Autrenacation Name	
	• •		
2. West both and testing December 1		Enable Outbound Proxy	

• If the SIP trunk provider is listed in Yeastar ITSP Partners, do as follow:

- a. In the Name field, copy the trunk name from 3CX.
- b. In the **Select ITSP Template** drop-down list, select the country of your ITSP, then select the corresponding ITSP.
- c. In the **Username** field, copy the Authentication ID from 3CX.
- d. In the **Password** field, copy the Authentication Password from 3CX.
- If your SIP trunk provider is NOT listed in Yeastar ITSP Partners, do as follow:

3CX		💤 Yeastar	
eral DIDs Caller ID Options Inbound Parameters C	lutbound Parameters SMS	< Basic	
runk Details		Basic	
nter name for Trunk			
Trunk-Sample1		+ Name	Trunk Status
egistrar/Server/Gateway Hostname or IP		Trunk-Sample1	Enabled
3cx.pstn.voxtelesys.net	Auto Discovery	Select ITSP Template	
utbound Provy		General V	
3cx.pstn.voxtelesys.net 5060	Auto Discovery		
		Detailed Configuration	
umber of SIM Calls		g	
10		* Trunk Type	Transport
		Register Trunk	UDP
uthentication		* Hostname/IP * Port *	Domain
ype of Authentication		abc.provider 5060	abc.provider.com
Register/Account based	~	• Username	Password
uthentication ID (aka SIP User ID)		sEjkarPOnjd	sadasawed asa
sEjkarPOnjd	0	Automatication Name	+
uthentication Password		Autoenucation Name	

- a. In the **Name** field, copy the trunk name from 3CX.
- b. In the Trunk Type drop-down list, select Register Trunk.
- c. In the **Hostname/IP** and **Port** fields, enter the hostname or IP and port of your ITSP.
- d. In the **Domain** field, enter the hostname of your ITSP.

e. In the **Username** field, copy the Authentication ID from 3CX.

f. In the **Password** field, copy the Authentication Password from 3CX.

4. On Yeastar Management Portal, replicate the DID numbers from 3CX.

3CX	💤 Yeastar
General DIDs Caller ID Options Inbound Parameters Outbound Parameters SMS	
DIDs	Stadd Export Delete
+ Add Single ratio	Add DID/DDI X rations
DID/DDI Number	* DID/DD1:
3305501 o	
3305502	DID/DDI Name:
3305503	
	X Cancel Confirm

- a. Select **DIDs/DDIs** tab.
- b. Click **Add** to add a DID number.
- c. In the pop-up window, copy the DID number from 3CX.
- d. Click Confirm.
- e. If there are multiple DID numbers in 3CX, repeat step b~d.
- 5. Click Save and Apply.
- 6. If there are multiple trunks in 3CX, repeat step $2 \sim 5$.
- 7. Delete all the migrated SIP trunks on 3CX Management Console.

Replicate Settings of Call Control

Replicate Settings of Inbound Route

This topic describes how to replicate settings of inbound rules (inbound routes) from 3CX to Yeastar Phone System.

Procedure

1. View the existing inbound rules on 3CX Management Console.

≡	3CX	Support + Updates + 🥵 + 🥐
di	Dashboard	Inbound Rules © Help
1	Users	
2	Phones	Inbound Rules
0	SIP Trunks a	+ Add DD Bule + Add DD Bule Z Edit X Delete 1 Move In 1 Move Down 1 Import
÷	Inbound Rules	Export
+	Outbound Rules	
Q	Digital Receptionists	Search
**	Ring Groups	Type Name Trunk
惠	Call Queues	DID Inbound Route Sample Trunk-Sample1

- a. Go to **Inbound Rules**.
- b. Note down the trunk name in **Trunk** column, and select an inbound rule to view its details.
- 2. Create a new inbound route on Yeastar Management Portal.

🕂 Yeastar		Œ
Ø Dashboard		Call Control / Inbound Route
S = Extension and Trunk	~	
E Contacts	~	
📔 Auto Provisioning	~	Name DID Patterns Caller ID Pattern Default_Inbound_R
‡†‡ Call Control	^	4
a Inbound Route		

- a. Go to **Call Control > Inbound Route**.
- b. Click **Add**.
- 3. On Yeastar Management Portal, replicate the inbound route settings from 3CX.



- a. In the Name field, copy the inbound rule name from 3CX.
- b. In the **Trunk** section, select the corresponding trunk.
- c. In the **DID Pattern** section, click **Add** and copy the DID number from 3CX.
- d. In the **Default Destination** section, select **Time Condition**.
- e. In the **Business Hours Destination** drop-down list, specify the destination according to 3CX's settings.
- f. In the **Outside Business Hours Destination**, drop-down list, specify the destination according to 3CX's settings.
- 4. Click Save and Apply.
- 5. If there are multiple inbound rules in 3CX, repeat step $2\sim4$.

6. In the inbound route list, click $\overline{\uparrow}$ \uparrow \checkmark \checkmark to adjust the priority according to 3CX.

	<mark>3</mark> C	X					👬 Yeastar			
Inbound Rules				Call Contro	/ Inbound Route					
+ Add DID Rule +	Add CID Rule	1 Move Up 1 Move Down 1 Import	≜ Export	⊕ Ad	id 📑 Import 🗧 Export	Delete			Name/DID/C	Saller Q
Search			_		Name	DID Patterns	Caller ID Pattern	Move	Operations	Y
					Inbound_Route_Sample	3305501		↑ ^ ¥	2 🖻	
Туре	Name	Trunk		 	Inhound Poute Sample?				1	
DID	Inbound Route Sample	Trunk-Sample1	×		Indunt Court Complex			2	Ոհუ –	Þ
DID	Inbound Route Sample 2	Trunk-Sample1	×						\sim	

Replicate Settings of Outbound Route

This topic describes how to replicate settings of inbound rules (inbound routes) from 3CX to Yeastar Phone System.

Procedure

1. View the existing outbound rules on 3CX Management Console.

	3CX	Support+ Updates+ 🛎+ 🖋	
di	Dashboard	Inbound Rules	Help
1	Users		
	Phones	Inbound Rules	
Ø	SIP Trunks a	+ Add DID Rule + Add CID Rule ✓ Edit × Delete 1 Move Up 1 Move Down ± Import	
+	Inbound Rules	± Export	
1	Outbound Rules	Courts	
Q	Digital Receptionists	Search	
-	Ring Groups	Type Name Trunk	- 1
坐	Call Queues	DID Inbound Route Sample Trunk-Sample1	×

Go to **Outbound Rules**, and select an outbound rule to view its details.

2. Create a new outbound route on Yeastar Management Portal.

🛟 Yeastar		
Ø Dashboard		Call Control / Outbound Route
只 ≓ Extension and Trunk	~	
🗈 Contacts	*	
📔 Auto Provisioning	۲	
țț‡ Call Control	^	
Inbound Route		
a Outbound Route		

- a. Go to **Call Control > Outbound Route**.
- b. Click **Add**.
- 3. On Yeastar Management Portal, replicate the outbound route trigger settings from 3CX.

3CX	💤 Yeastar
rat	Part -
me	General
6-5ample 0	Name Outbound Caller ID Outbound Sample
rule to these calls	0 Tip
nbers starting with prefix	Dial Pattern b Enter the dialing prefix followed by a period (.)
o	Dial Matching Settings For example, if the prefix is 9, then enter9.
ension(s)	Pattern / Strip Prepend Op
2	>
th a length of	
0	> XXXXXXXX 0 1
s)	
	+ Add
×	
· · · · · · · · · · · · · · · · · · ·	Trunk Tip
	2 litems Available Enter the corresponding number of Xs
	Search here Q Search here Q
for outgoing calls. Each route can be configured differently	
Strip Digits Prepend Outbound Caller ID	Name Trunk Type
Sample1 v 1 v	Trunk 3 Account Trunk Trunk-Sample1 Register Trunk
	Irunk 4 Account Trunk Trunk SampleZ Register Trunk
2 ~ 1 ~	
ALLS V 0 V	Outbound Route Password
ALLS V 0 V	Disabled
	Preservery Hust
ALLS V 0 V	
	Extension / Extension Group
	2 items Available 4 items Selected
	Search here Q
	Extension Numb Caller ID Name Extension Numb Caller ID Name
	0 1001 1001 2000 Leo Ball
	002 1002 2001 Phillip Huff
	2002 Terrel Smith
	Extension Group Tech_Support
	Time Condition
	Available Time
	Abwaye

- a. In the **Name** field, copy the outbound rule name from 3CX.
- b. In the **Dial Pattern** section, replicate the outbound route trigger settings.
 - Pattern: Set the dial pattern according to 3CX's settings.
 - If a prefix is specified for **Calls to numbers starting with prefix** in 3CX, then enter the prefix and a ..

For example, the prefix in 3CX is **9**, then enter 9. on Yeastar Management Portal.

• If a digit is specified for **Calls to Numbers with a length of** in 3CX, then enter the corresponding number of xs.

For example, the digit in 3CX is **7**, then enter xxxxxx on Yeastar Management Portal.

- Strip and Prepend: Copy the settings from 3CX.
- 4. On Yeastar Management Portal, copy the selection of extensions, extension groups, and trunks from 3CX.

3CX.	† Yeastar
General	Annul
Rule Name	General
outpound sample	Name Outbound Caller ID
	Uutoouno-sampie
Apply this rule to these calls	Rid Batter
Calls to numbers starting with prefix	
y	Pattern Strip Prepend Operations
2000,2001,2002	
Calls to Numbers with a length of	9. 1
7	XXXXXXXXX
Calls from extension group(s)	+ 444
+xad	
Tech_Support 0	Trunk
	2 Items Available 2 Items Selected
Make outbound calls on	Search here Q, T
Configure up to 5 backup routes for outgoing calls. Each route can be configured differently	Name Trunk Type
Strip Digits Prepend Outbound Caller ID	Trunk 3 Account Trunk
Route 1 Trunk-Sample1 V 1 V	Trunk 4 Account Trunk - Trunk-Sample2 Register Trunk
Route 2 Trunk-Sample2 V 1 V	·
Route 3 BLOCK CALLS V 0 V	Outbound Route Password
Route 4 BLOCK CALLS V 0 V	Disabled V
Route 5 BLOCK CALLS V 0 V	Rmmemory Hunt
	Extension / Extension Group
	2 items Available 4 items Selected
	Search here Q
	Extension Numo Caller ID Name
	1002 1002 2001 Philip Huff
·	2002 Terrel Smith
	Extension Group Tech_Support
	·
	Time Condition
	Available Time
	Always 🗸

- a. In the **Trunk** section, select the corresponding trunks.
- b. In the **Extension / Extension Group** section, select the corresponding extensions and extension group.
- 5. Click Save and Apply.
- 6. If there are multiple outbound rules in 3CX, repeat step $2 \sim 5$.
- 7. In the outbound route list, click $\overline{\uparrow}$ \uparrow \checkmark \checkmark \checkmark to adjust the priority according to 3CX.

3CX		💤 Yeastar	
tbound Rules		Call Control / Outbound Route	
Add Zedit X Delete 1 Move Up 1 Move Down		O Add ☐ Import ☐ Export ☐ Delete	Name/Outbound Q
arch		Name	Move Operations Y
Outbound Rule Name Call from Ext. Prefix		Outbound-Sample 9. XXXXXXXX	↑ ↑ ⊻ ∠ 🗎
Outbound-Sample 2000,2001,2002	×	Outbound-Sample2 X.	
Outbound Sample 2	×		`(hīŋ`

Replicate Settings of Emergency Number

This topic describes how to replicate settings of emergency number and emergency contacts from 3CX to Yeastar Phone System.

Step 1. Replicate emergency number rule

1. View the existing settings on 3CX Management Console.

In Dashboard Settings Users Apps Phones Apps SIP Trunks Codecs Inbound Rules Codecs Outbound Rules Codecs Outbound Rules Codecs Digital Receptionists System Ring Groups Coll Queues Backup and Restore Ensal Reporting Conferencing Disclude Ensal Call Queues Image: Conferencing Backup and Restore Image: Conferencing Backup and Restore Image: Conferencing Backup and Restore Image: Conferencing Image: Conferencing Image: Conferencing Image: C	=	3CX					
Users Apps SIP Trunks I tabound Rules Outbound Rules	di.	Dashboard	Settings				
 Phones Apps SIP Trunks Inbound Rules Outbound Rules Digital Receptionists System Ring Groups Call Queues Backup and Restore Reporting Security Advanced Settings Settings Settings 	1	Users	0.0000000				
SIP Trunks Inbound Rules Outbound Rules Outbound Rules Outbound Rules Outbound Rules Outbound Rules Outbound Rules System Ring Groups Scall Queves Backup and Restore Call Rusking Call Rusking Conferencing Dial Codes Emergency Numbers When dialled, this number will ignore outboand in office or out of office rule More David More David Name Number Ring Advance Name Number Number Ring Advance Name Number Ring Advance Name Number Ring Advance Name Number Ring Advance Ring Advance<	2	Phones	Apps				
Inbound Rules Outbound Rules Outbound Rules Options Options Options Options System System Call Parking Conferencing Digital Receptionists Call Parking Conferencing Digital Receptionists Call Parking Conferencing Digital Codes Email Conferencing Digital Receptionists Conferencing Digital Receptionists Call Parking Conferencing Digital Receptionists Call Parking Conferencing Digital Receptionists Conferencing Digital Receptionists Call Parking Conferencing Digital Receptionists Distribution Receptionists Distribution Re	0	SIP Trunks		dist.			
Outbound Rules Outbound Rules Digital Receptionists System Ring Groups Call Queues Call Runking Conferencing Dial Codes Email General Encertify Advanced Advanced Settings When dialled, this number will ignore outbound in office or out of office numbers When dialled, this number will ignore outbound in office or out of office numbers When dialled, this number will ignore outbound in office or out of office numbers Name Name Name	ŧ	Inbound Rules	Coders	Ontions			
Q Digital Receptionists Wing Groups System Lall Queues Call Queues Backup and Restore Call Parking Reporting Call Parking O Security Call Parking Advanced Call Parking ✓ Settings Settings ✓ Settings Name	Ť	Outbound Rules	coucts	options			
 Ring Groups Call Queues Backup and Restore Reporting Security Advanced Settings Settings Settings Name Number Report Report of the set of t	Q	Digital Receptionists	System				
Call Queues Call Queues Call Queues Call Parking Conferencing Dial Code Enail Ceneral Call Parking Conferencing Dial Code Enail Ceneral Cener	쓥	Ring Groups					
Backup and Restore Backup and Restore Reporting Conferencing Dial Codes Email General General Conferencing Number Number Number Number Number Number Number Settings	业	Call Queues	<u>ر</u>	\odot			
	8	Backup and Restore	Call Parking	Conferencing	Dial Codes	Email	General
Security Advanced Settings Musicon Hold Musicon Hold		Reporting					
Advanced	U	Security	License	Muric on Hold	Emergency Numbers		
F Settings Name Number Reverse	٥	Advanced a	litense		When dialled, this number	will ignore outbound in office	or out of office rules.
Name Number Ro	×	Settings			France Frank	a move of the move por	- rempiate +
SCA Portai	3CX	Portal			Name	Number	Route 1

- a. Go to Settings > System > General.
- b. In the **Emergency Numbers** section, click an emergency number to view its details.
- 2. Create a new emergency number rule on Yeastar Management Portal.



a. Go to Call Control > Emergency Number.b. In the Emergency Number tab, click Add.

3. On Yeastar Management Portal, replicate the settings from 3CX.

			-	
	3CX			💤 Yeastar
Emergency Number Settings		>	c	General
When this number is dialed, the call will be passed on to the telo	o irrespective of In or Out of Office times.			* Name * Emergency Number
Name				Sample 5503301
Sample 0				
Number				Trunk's Emergency Outbound Caller ID
5503301 0				······································
Calls from extension(s)				Emergency Outbound Caller ID Priority
Calls from astansion(s)				Trunk's Emergency Outbound Caller ID V
Casa non excitaton(a)				Trunk's Emergency Outbound Caller ID
Calls from extension group(s)				
+ Add				Trunk Trunk's Emergency Outbound Caller ID Move Operations
Route 1 Strip Digits	Prepend	Outbound Caller ID		trunk-1 ∨ 5003001
trunk-1 ~ 0	~	5003001		
Route 2 Strip Digits	Prepend	Outbound Caller ID		trunk-2 ∨ 5003002
trunk-2 V 0	~	5003002		
Route 3 Strip Digits	Prepend	Outbound Caller ID		
trunk-3 V 0	~	5003003		

- a. Copy name and emergency number.
- b. Select the corresponding trunk and copy the outbound caller ID accordingly.
- c. Click **Save** and **Apply**.
- 4. If there are other emergency numbers in 3CX, repeat step $2\sim3$.

Step 2. Replicate settings for emergency notification contact

1. View the existing settings on 3CX Management Console.

≡	3CX						Support - Updates -	
di	Dashboard	Settings						
1	Users	8-						
	Phones	Apps						
0	SIP Trunks	-		•#				
ŧ	Inbound Rules	Codecr		- tions				
Ť	Outbound Rules	Codecs	•					
Q	Digital Receptionists	System						
	Ring Groups							
些	Call Queues	<u></u>		>				
0)))	Backup and Restore	Call Parking	Confe	erencing	Dial Codes	Email	General	
=	Reporting							_
U	Security	License	e Musi	Emergency	/ Numbers			
٥	Advanced a	Ercense	Musi	When dialle	ed, this number will ig	nore outbound in office or o	ut of office rules.	
×	Settings			1-Add	P cure Pelete	a move op	- rempiate	15
3CX	Portal			Na	me	Number	Route 1	
				Sa	mple	5503301	trunk-1	

a. Go to **Settings > System > General**.

b. In the **Emergency Numbers** section, click **Notifications** to view its details. 2. Create a new emergency notification contact on Yeastar Management portal.

💤 Yeastar		E	?	Fn	L ~		Availa	able∨
Q ∈ Extension and Trunk	~	Call Control / Emergency Number						
E Contacts	~	Emergency Number Notification Contact						
🔚 Auto Provisioning	~	Add MEmail Template El Natification Promot	T Dele					
tt: Call Control	^							
Inbound Route		Notification Contact	Not	ifica	tion M	eth	ods	
Outbound Route								
AutoCLIP Route				No	Data			
Business Hours and Ho	olidays							
Emergency Number								

- a. Go to Call Control > Emergency Number.
- b. Select the Notification Contact tab, then click Add.
- 3. On Yeastar Management Portal, replicate the settings from 3CX.
 - If Send email to one or more email addresses separated by commas is enabled in 3CX, do as follow:

3CX					💤 Yeastar	
Notifications		×			Add	×
Configure the notification options that will be used when an extension of	ials an emergency number.			-		
Send email to one or more email addresses separated by commas O					Notification Contact	
leo@sample.com	o				Custom	a
Send chat notification to:					* Contact Name	
Extension's group users and managers		~			Leo Ball	<u> </u>
Play announcement (Extension/Ring Group)					* Notification Methods	
		*			Z Send Email Call Mobile	
Prompt: Format WAV (PCM, 8 kHz, 16 bit, Mono, Max size: 100MB)					* Send Email	
		⊷ + Add ⊙ Record III Manage			leo@sample.com	d
		OK Cancel		_	× Cancel	✓ Confirm

- a. In the Notification Contact drop-down list, select Custom.
- b. In the **Contact Name** field, enter the contact name.
- c. In the Notification Methods section, select Send Email.
- d. In the Send Email field, copy the email address from 3CX.
- e. Click Confirm.
- f. If there are multiple email addresses to be notified, repeat step $a \sim e$.
- If Send chat notification to is enabled in 3CX, do as follow:

Note:

Yeastar PBX does not support sending chat messages to users, you can notify users by sending emails, making calls to their mobile phones or extension numbers.



- a. In the **Notification Contact** drop-down list, choose which users to be notified.
- b. In the **Notification Methods** section, specify the method for notifying users.
- c. Click Confirm.
- If Play announcement is enabled in 3CX, do as follow:

3CX		🕂 Yeastar	
Notifications	×	Add	×
Configure the notification options that will be used when an extension dials an emergency number.			
Send email to one or more email addresses separated by commas		Notification Contact	
		Specific Extension	a)
Send chat notification to:		* Specific Extension	
Extension's group managers	~	> 2000-Leo Ball ×	b
Play announcement (Extension/Ring Group)		* Notification Methods	
2000 LeoBall	* 0	 🗌 Send Email 📄 Call Mobile 🔽 Call Extension 🛛 📀	
Prompl: Format WAV (PCM, 8 kHz, 16 bil, Mono, Max size: 100MB)			
	✓ ♣ Add ③ Record Ⅲ Manage	× Cance	l 🗸 Confirm

- a. In the Notification Contact drop-down list, select Specific Extension.
- b. In the **Specific Extension** drop-down list, select the corresponding extension.
- c. In the Notification Methods section, select Call Extension.
- d. Click **Confirm**.

Migrate IP Phones

Migrate IP Phones to Yeastar P-Series Software Edition

Determine Network Scenario

The migration methods and operations vary depending on the network environment of **IP Phone** and **Yeastar P-Series Software Edition**. Before migrating IP phones, you need to verify the network scenario and choose the corresponding migration method.

Network scenarios

The network environment of **IP Phone** and **Yeastar P-Series Software Edition** are listed as follows:

In the SAME subnet



In this scenario, **Yeastar P-Series Software Edition** is typically installed on a physical server or virtual machine, which is deployed within the same subnet as the IP phones.

To migrate IP phones in this scenario, see Migrate IP Phones in the Same Subnet.

In **DIFFERENT** subnets



In this scenario, **Yeastar P-Series Software Edition** is typically installed on a physical server or virtual machine, which is deployed in the same local area network (LAN) as the IP phones, but in different subnets.

To migrate IP phones in this scenario, see Migrate IP Phone in Different Subnets.

In DIFFERENT network



In this scenario, **Yeastar P-Series Software Edition** is typically installed on a cloud-based server, such as AWS, Vultr, Microsoft Azure.

To migrate IP phones in this scenario, see Migrate IP Phones in Remote Network.

Migrate IP Phones in the Same Subnet

This topic describes how to migrate IP phones that are on the same subnet with Yeastar PBX, from 3CX to Yeastar P-Series Software Edition.

Procedure


Step 1. Gather the required information in 3CX

1. Log in to 3CX Management Portal, go to **Phones** to view the existing IP phones in 3CX.

≡	3CX				
-di	Dashboard	Phones			
1	Users				
2	Phones	Phones			
0	SIP Trunks	+ Add Dhone	Edit Evt	Accign Ext 💥 Dojoct	Eirmurara
+	Inbound Rules	T Add Phone		Assign Ext	rinnware Reboot
+	Outbound Rules	Search			
Q	Digital Receptionists	Ext.	Vendor	Model	Fw. Version
**	Ring Groups	2000	Yealink	SIP-T53W	96.85.0.5
业	Call Queues	2001	Yealink	SIP-T46S	66.86.0.15

2. Note down the following information of each IP phone.

Phone	es						
+ Ad	ld Phone	🖍 Edit Ext 🔹 Add Ex	kt 🖁 Assign Ext 🗱 Reject	+ Firmware C Reboot	Reprovision	Phone UI + Config	✿ Options
Searc	:h						
	Ext.	Vendor	Model	Fw. Version	Name	IP	MAC
	2000	Yealink	SIP-T53W	96.85.0.5	Leo Ball	192.168.28.180	■ 805EC04C
	2001	Yealink	SIP-T46S	66.86.0.15	Phillip Huff	192.168.27.176	🚯 001565B4 💿

- Extension number of the assigned user
- MAC address of the IP phone

Step 2. Reset and re-configure IP phones

Before migrating IP phones to Yeastar P-Series Software Edition, you need to have your clients complete the following steps to prepare the IP phones for migration.

- 1. Reset all the IP phones that need to be migrated.
- 2. Re-configure network settings for IP phones to ensure they are in the same subnet as Yeastar P-Series Software Edition.

Step 3. Add IP phones to Yeastar P-Series Software Edition

1. Log in to PBX Management Portal, go to **Auto Provisioning > Phones**.

The IP phones detected by the PBX via PnP are displayed in the phone list.

2. Click deside the IP phone.

Status	Extension	Name	Vendor 🌲	Model 🌲	IP Address 🍦	Phone Passw Op	perations	7
<u>م</u>	Unassigned	Unassigned	Yealink	SIP-T53W	192.168.28.192	-		

3. In the **Assign Extension** section, select the corresponding extension.

Assign Extension	
* Select Extension	
2000-Leo Ball	\vee

4. Click Save.

Result

The IP phone will automatically reboot. Upon rebooting, the status shows $\stackrel{Q}{\sim}$, indicating the IP phone is successfully migrated to Yeastar P-Series Software Edition and assigned to the corresponding user.

Note:

If your IP phones did not reboot automatically, you need to manually reboot the phone to make the configurations take effect.

Status	Extension	Name	Vendor 🌲	Model 🌲	IP Address 🌲	Phone Passw	Operations	7
۶.	2000	Leo Ball	Yealink	SIP-T53W	192.168.28.192	-	∠ ○ ○ ∨	

Migrate IP Phone in Different Subnets

This topic describes how to migrate IP phones that are in different subnets with Yeastar PBX, from 3CX to Yeastar P-Series Software Edition.

Procedure



Prerequisites

Make sure that there is only one DHCP server running in the subnet where the IP phone is deployed, or the IP phone would fail to obtain an IP address.

Step 1. Gather the required information in 3CX

1. Log in to 3CX Management Portal, go to **Phones** to view the existing IP phones in 3CX.

≡	3CX				
.lı	Dashboard	Phones			
1	Users				
	Phones	Phones			
Q	SIP Trunks	+ Add Bhopo	Edit Evt	Accign Evt X Poinct	+ Firmwara
÷	Inbound Rules			ASSIGN EAC . Reject	
t	Outbound Rules	Search			
Q	Digital Receptionists	Ext.	Vendor	Model	Fw. Version
<u>101</u>	Ring Groups	2000	Yealink	SIP-T53W	96.85.0.5
<u>#</u>	Call Queues	2001	Yealink	SIP-T46S	66.86.0.15

2. Note down the following information of each IP phone.

Phone	es							
+ Ac	ld Phone	✓ Edit Ext ▲Add Ex	tt 💄 Assign Ext 🗱 Reject	+ Firmware CReboot	t A Reprovision	Phone UI + Config	Options	
Searc	:h							
	Ext.	Vendor	Model	Fw. Version	Name	IP	MAC	
	2000	Yealink	SIP-T53W	96.85.0.5	Leo Ball	192.168.28.180	805EC04C	۲
	2001	Yealink	SIP-T46S	66.86.0.15	Phillip Huff	192.168.27.176	© 001565B4	۲

- Extension number of the associated user
- Vendor, Model, and MAC address of the IP phone

Step 2. Reset and re-configure IP phones

Before migrating IP phones to Yeastar P-Series Software Edition, you need to have your clients complete the following steps to prepare the IP phones for migration.

- 1. Reset all the IP phones that need to be migrated.
- 2. Re-configure network settings for IP phones to ensure IP phone and Yeastar PBX can communicate with each other over the subnets.

Step 3. Enable Remote Registration for extensions on Yeastar PBX

- 1. Log in to PBX Management Portal, go to **Extension and Trunk > Extension**, edit the desired extension.
- 2. Click Security tab, select the checkbox of Allow Remote Registration in the SIP Security section.



3. Click Save and Apply.

Step 4. Add IP phones to Yeastar P-Series Software Edition

- 1. Log in to Yeastar Management Portal.
- 2. Go to Auto Provisioning > Phones, and click Add > Add.

🕂 Yeastar		Æ
In Transmission and Trans		Auto Provisioning / Phones
D Contacto		🕀 Add 🗙 🐭 Edit 📿 Reprovision 🔞 Reboot 🛆 Firmware L
🔚 Auto Provisioning	^	Add
Phones		Bulk Ad
Resource Reporting		

3. In the **IP Phone** section, enter the following phone information according to the gathered information.

IP Phone		
* Vendor	* Model	
Yealink V	SIP-T53W	\vee
* MAC Address		

- Vendor: Select the corresponding vendor.
- Model: Select the phone model.
- MAC Address: Enter the MAC address of the IP phone.
- 4. In the **Options** section, configure the following settings.

Options		
* Template		
YSDP_YealinkT5	\checkmark	
* Provisioning Method		Provisioning Link
DHCP (In the Office)	\sim	http://192.168.20.58:7778/api/autoprovision/KZVJ3gwHjecazEQB

- **Template**: Select a desired template from the drop-down list.
- Provisioning Method: Select DHCP (In the Office).

A provisioning link is automatically generated and displayed in the **Provisioning Link** field.

5. In the **Assign Extension** section, select the corresponding extension.

\checkmark

6. Click Save.

Step 5. Configure DHCP option 66 on DHCP server

In the subnet where the IP phone is deployed, use the generated provisioning link to configure option 66 on the DHCP Server.

1. On PBX Management Portal, copy the provisioning link from the phone's detail page.

\sim	
	Provisioning Link
\sim	http://192.168.20.58:7778/api/autoprovision/KZVJ3gwHjecazEQB
	~ ~

2. On the DHCP server, set up option 66 with the provisioning link.

In this example, the configuration on a router's DHCP server is shown below.

Interfaces » LAN	
General Settings Advanced S	attings Firewall Settings DHCP Server
General Setup Advanced Setu	ings IPv6 Settings IPv6 RA Settings
Dynamic <u>DHCP</u>	 Ø Dynamically allocate DHCP addresses for clients. If disabled, only clients having static leases will be served.
Force	Force DHCP on this network even if another server is detected.
<u>IPv4</u> -Netmask	255.255.255.0
	Override the netmask sent to clients. Normally it is calculated from the subnet that is served.
DHCP-Options	6,223.5.5.5 ×
	66,http://192.168.20.58:7778/api/autoprovision/KZVJ3gwHjecazE QB
	+
	Obtained additional DHCP options, for example "6,192.168.2.1,192.168.2.2" which advertises different DNS servers to clients.
	Dismiss Save

Result

The IP phone will automatically reboot. Upon rebooting, the status shows $\stackrel{Q}{\sim}$, indicating the IP phone is successfully added to Yeastar P-Series Software Edition and assigned to the corresponding user.

Note:

If your IP phones did not reboot automatically, you need to manually reboot the phone to make the configurations take effect.

Status	Extension	Name	Vendor 🌲	Model 🌲	IP Address 🍦	Phone Passw	Operations	Y
¢,∕	2000	Leo Ball	Yealink	SIP-T53W	192.168.28.192		\mathbb{Z} \textcircled{O} \bigcirc \lor	

Migrate IP Phones in Remote Network

This topic describes how to migrate IP phones that are in different network with Yeastar PBX, from 3CX to Yeastar P-Series Software Edition.

Procedure



Step 1. Gather the required information in 3CX

1. Log in to 3CX Management Portal, go to **Phones** to view the existing IP phones in 3CX.

≡	3CX				
.h	Dashboard	Phones			
1	Users				
2	Phones	Phones			
0	SIP Trunks	the Add Dhame	ut 🖉 a del Trat. 🖉 Annien Trat.	Y Deinet	Cipsheet
+	Inbound Rules		Add Ext Assign Ext		Repool
+	Outbound Rules	Search			
G	Digital Receptionists	Ext. Ve	ndor Model	Fw. Versi	on
쌆	Ring Groups	2000 Ye	alink SIP-T53	W 96.85.0.5	
惠	Call Queues	2001 Ye	alink SIP-T46	S 66.86.0.1	5

2. Note down the following information of each IP phone.

Phone	s						
+ Ad	ld Phone	🖍 Edit Ext 🛛 💄 Add Ext	Assign Ext Reject	+ Firmware C Reboot		Phone UI + Config	Options
Searc	:h						
	Ext.	Vendor	Model	Fw. Version	Name	IP	MAC
	2000	Yealink	SIP-T53W	96.85.0.5	Leo Ball	192.168.28.180	₿05EC04(
	2001	Yealink	SIP-T46S	66.86.0.15	Phillip Huff	192.168.27.176	🚯 001565B4 👁

- Extension number of the associated user
- Vendor, Model, and MAC address of the IP phone

Step 2. Reset and re-configure IP phones

Before migrating IP phones to Yeastar P-Series Software Edition, you need to have your clients complete the following steps to prepare the IP phones for migration.

1. Reset all the IP phones that need to be migrated.

For instructions on resetting the IP phone, refer to the phone's user manual or contact the phone's manufacturer for assistance.

2. Re-configure network settings for IP phones to ensure they can connect to internet.

Step 3. Set up remote SIP access on Yeastar PBX

- 1. Log in to Yeastar Management Portal.
- 2. Go to System > Network > Yeastar FQDN.

💏 Yeastar		连		0		🗸 🥑 Avail:
II Intient		System / Network				
N Latinese		Yeastar FQ	DN			-
E mours		0	Ŀ			
E minute		- Yeastar FQDN				
System	^	Status				
Network		 Successfully connected to the tunnel server. 				
Date and Tree		Fully Qualified Domain Name (FQDN) docs.test.		* Ex	viration E)ate

3. In the **Features > SIP Access** section, enable remote SIP access feature and grant usage permissions to users who needs to bind IP phones.

Features				
SIP Access Remote Access				
Before enabling this feature, please make sure your e	extensions a	are using strong registration p	asswords, or it might brir	ig security risks.
* Status	a			
Enabled	\sim			
Remote Access Service Port-SIP UDP&TCP		Remote Access Se	vice Port-SIP TLS	
5060		5061		
Access Type	Þ			
Allowed Account	\sim			
7 items Available		8 items	Selected	
Search here Q		Search here	Q	
Extension Num Caller ID Name		Extension Num	Caller ID Name 📀	$\overline{\mathbf{A}}$
2008 Jaime Hart		2000	Leo Ball	
2009 Carmen Gordon		2001	Phillip Huff	
2010 Joe Lewis		2002	Terrell Smith	
2222 Import Model		2003	Dave Haris	\pm
2999 2999		2004	Troy Daniel	
Extension Group Default_All_Exte		2005	Kristin Hale	
		—		
Enable IP Restriction				

a. In the **Status** drop-down list, select **Enabled**.

b. In the **Access Type** drop-down list, select the account access restriction type.

- Allowed Account: Only the selected accounts can get access to the service.
- **Restricted Account**: All accounts except for the selected accounts can get access to the service.
- c. Select the desired accounts from the **Available** box to the **Selected** box.
- 4. Click Save and Apply.

Step 4. Add IP phones to Yeastar P-Series Software Edition

- 1. Log in to Yeastar Management Portal.
- 2. Go to Auto Provisioning > Phones, and click Add > Add.

🛟 Yeastar		Ē
It transies and built		Auto Provisioning / Phones
B terms		🕀 Add 🗸 😪 Edit 📿 Reprovision 🕲 Reboot 🎧 Firmware U
🔚 Auto Provisioning	^	Add
Phones		Bulk Ad
Resource Reporting		

3. In the **IP Phone** section, enter the following phone information according to the gathered information.

IP Phone			
* Vendor		* Model	
Yealink	\checkmark	SIP-T53W	\sim
* MAC Address			
Rischen and Street			

- Vendor: Select the corresponding vendor.
- Model: Select the phone model.
- MAC Address: Enter the MAC address of the IP phone.
- 4. In the **Options** section, configure the following settings.

ptions			
Template			
YSDP_YealinkT5	\sim	a	
Provisioning Method			Provisioning Link
RPS FODN (Remote)	\sim	b	https://yeastardocs.ras.yeastar.com:443/api/autoprovision/H70R1oil 🗈

- a. In the **Template** drop-down list, select a desired template.
- b. In the **Provisioning Method**drop-down list, select **RPS FQDN (Remote)**.

A provisioning link is automatically generated and displayed in the **Provision**ing Link field.

c. Unselect the Authentication for the First-time Auto Provisioning checkbox.

5. In the **Assign Extension** section, select the corresponding extension.

Assign Extension	
* Select Extension	

6. Click Save.

Step 5. Reboot the IP phone

Have your clients reboot the IP phones.

Upon rebooting, the status shows \mathcal{P} , indicating the IP phone is successfully added to Yeastar P-Series Software Edition and assigned to the corresponding user.

Status	Extension	Name	Vendor 🚖	Model 🍦	IP Address 👙	Phone Passw	Operations	7
2	2000	Leo Ball	Yealink	SIP-T53W	192.168.28.192	-		

Migrate IP Phones to Yeastar P-Series Cloud Edition

This topic describes how to migrate IP phones from 3CX to Yeastar P-Series Cloud Edition.

Procedure



Step 1. Gather the required information in 3CX

1. Log in to 3CX Management Portal, go to **Phones** to view the existing IP phones in 3CX.

≡	3CX				
di	Dashboard	Phones			
1	Users				
2	Phones	Phones			
۲	SIP Trunks	+ Add Phone	Edit Evt	Assign Evt X Reject	+ Firmware
Ŧ	Inbound Rules	Additione		ASSIGNER: ** Reject	
Ŧ	Outbound Rules	Search			
\bigcirc	Digital Receptionists	Ext.	Vendor	Model	Fw. Version
	Ring Groups	2000	Yealink	SIP-T53W	96.85.0.5
业	Call Queues	2001	Yealink	SIP-T46S	66.86.0.15

2. Note down the following information of each IP phone.

Phone	s											
+ Ad	ld Phone	🖋 Edit Ext	Add Ext	Assign Ext	🗙 Reject	+ Firmware	\mathcal{G} Reboot		Phone UI	Config		
Searc	:h											
	Ext.	Vend	or	Model		Fw. Versi	on	Name	IP	МА	с	
	2000	Yealir	nk	SIP-T53\	N	96.85.0.5		Leo Ball	192.168	8.28.180	805EC04C	۲
	2001	Yealir	nk	SIP-T465	5	66.86.0.1	5	Phillip Huff	192.168	8.27.176	001565B4	۲

- Extension number of the associated user
- Vendor, Model, and MAC address of the IP phone

Step 2. Reset and re-configure IP phones

Before migrating IP phones to Yeastar P-Series Cloud Edition, you need to have your clients complete the following steps to prepare the IP phones for migration.

1. Reset all the IP phones that need to be migrated.

For instructions on resetting the IP phone, refer to the phone's user manual or contact the phone's manufacturer for assistance.

2. Re-configure network settings for IP phones to ensure they can connect to internet.

Step 3. Add IP phones to Yeastar P-Series Cloud Edition

- 1. Log in to Yeastar Management Portal.
- 2. Go to Auto Provisioning > Phones, and click Add > Add.

👬 Yeastar		Ē
It trens at has		Auto Provisioning / Phones
B totals		🕒 Add 🔻 🔩 Edit 📿 Reprovision 🕲 Reboot 🎧 Firmware U
🔚 Auto Provisioning	^	Add
Phones		Bulk Ad
Resource Reporting		

3. In the **IP Phone** section, enter the following phone information according to the gathered information.

IP Phone			
* Vendor		* Model	
Yealink \lor		SIP-T53W	\sim
* MAC Address			
R. S.			

- Vendor: Select the corresponding vendor.
- Model: Select the phone model.
- MAC Address: Enter the MAC address of the IP phone.
- 4. In the **Options** section, configure the following:

gro 🖪

- a. In the Template drop-down list, select a desired template.
- b. Unselect the Authentication for the First-time Auto Provisioning checkbox.5. In the Assign Extension section, select the corresponding extension.

Assign Extension	
* Select Extension	

6. Click Save.

Step 4. Reboot the IP phone

Have your clients reboot their IP phones.

Upon rebooting, the status shows \mathcal{P} , indicating the IP phone is successfully added to Yeastar P-Series Cloud Edition and associated with the corresponding user.

Status	Extension	Name	Vendor 🌲	Model 🌲	IP Address 🌲	Phone Passw	Operations	7
P	2000	Leo Ball	Yealink	SIP-T53W	192.168.28.192		\mathbb{Z} \textcircled{O} \bigcirc \lor	

Launch and More

Introduce Yeastar Phone System to your clients

Now that Yeastar P-Series Phone System is fully operational, it's time to familiarize your clients with Yeastar Phone System so that they can utilize and explore all the telephony features.

- Provide the system administrator with the **super administrator** account credentials for full access and management.
- Share the following resources with your clients based on their Yeastar Phone System edition for further assistance and guidance.

PBX Edition	Resource
P-Series Software Edition	 Administrator Guide: P-Series Software Edition Documentation User Guide: P-Series Linkus Software Edition Documentation
P-Series Cloud Edition	 Administrator Guide: P-Series Cloud Edition Documentation User Guide: P-Series Linkus Cloud Edition Documentation

Manage and maintain your PBXs on YCM

Yeastar Central Management (YCM) is a centralized platform for efficiently managing, monitoring, and maintaining multiple Yeastar PBX systems, offering streamlined administration, automated updates, and comprehensive reporting.

For more information, log in to Yeastar Central Management.

Purchase services for PBXs on Yeastar Partner Portal

Yeastar Partner Portal is a dedicated online platform for Yeastar partners to purchase service for PBXs, access resources, manage purchases and customer accounts, facilitating collaboration and enhancing business growth.

For more information, log in to Yeastar Partner Portal.

Optional: Implement high availability solutions for PBX

Yeastar provides high availability solutions for Yeastar P-Series **Software Edition** for enhanced reliability.

• Hot Standby: By setting up two identical Yeastar P-Series Software Edition servers as a Primary Server and a Secondary Server, enabling automatically failing over to the standby Secondary Server when the active Primary Server encounters a failure, ensuring uninterrupted PBX service.

For more information, see Hot Standby Overview.

• **Disaster Recovery**: Deploy two Yeastar P-Series Software Editions in different locations as a failover pair. If your local PBX fails, telephony services switch automatically to the remote site, ensuring uninterrupted PBX service.

For more information, see Yeastar Disaster Recovery Overview.