

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..... 22
 - Import 3CX Users to Yeastar PBX.....22
 - Import 3CX Contacts to Yeastar PBX..... 24
 - Replicate Basic System Settings..... 26
 - Replicate Settings of Business hours & holidays.....26
 - Upload Voice Prompt Files..... 30
 - Replicate Settings of CALL Features.....33
 - Replicate Settings of Ring Groups..... 33
 - Replicate Settings of Digital Receptionist (IVR)..... 35
 - Replicate Settings of Call Queues.....37
 - Replicate Settings of Voicemail..... 41
 - Replicate System Security Settings.....42
 - Replicate Settings of Allowed Country Code.....42
 - Replicate Settings of Blacklisted Numbers..... 44
 - 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

Replicate Settings of Outbound Route.....	58
Replicate Settings of Emergency Number.....	62
Migrate IP Phones.....	66
Migrate IP Phones to Yeastar P-Series Software Edition.....	66
Determine Network Scenario.....	66
Migrate IP Phones in the Same Subnet.....	69
Migrate IP Phone in Different Subnets.....	71
Migrate IP Phones in Remote Network.....	76
Migrate IP Phones to Yeastar P-Series Cloud Edition.....	80
Launch and More.....	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	<ul style="list-style-type: none">• Account information: Extension number, user names, email address, mobile number• Account settings: Voicemail (whether enable and pin), IP phone registration credentials• Contacts
Configuration Data	<ul style="list-style-type: none">• 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.

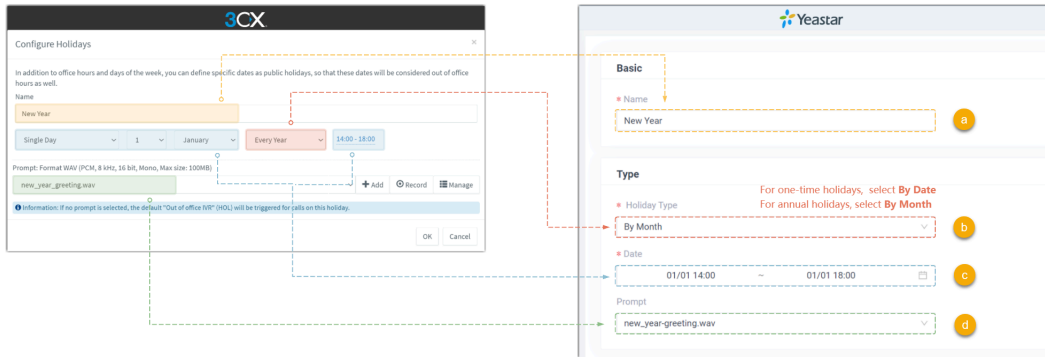
Seamless operation experience for users

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.

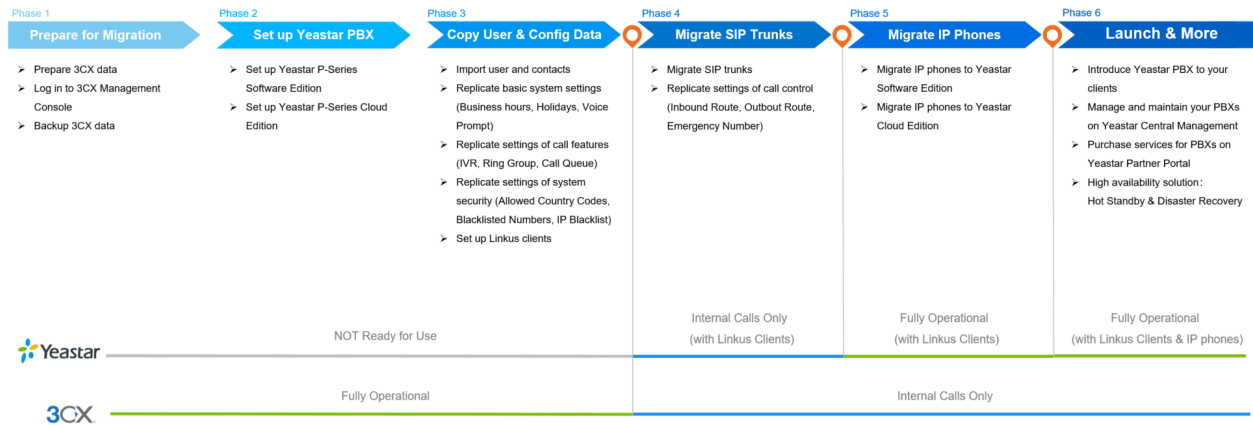


Best practise

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.



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
	<ul style="list-style-type: none">• Prepare 3CX Data for Migration• Log in to 3CX Management Console• Backup 3CX Data
Phase 2	Set up Yeastar Phone System
	<ul style="list-style-type: none">• Set up Yeastar P-Series Software Edition• Set up Yeastar P-Series Cloud Edition
Phase 3	Migrate user and configuration data
	<ul style="list-style-type: none">• Import users and contacts<ul style="list-style-type: none">◦ Import 3CX Users to Yeastar PBX◦ Import 3CX Contacts to Yeastar PBX• Replicate basic system configurations<ul style="list-style-type: none">◦ Replicate Settings of Business hours & holidays◦ Upload Voice Prompt Files• Replicate system configurations: Call Features<ul style="list-style-type: none">◦ 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<ul style="list-style-type: none">◦ 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
	<ul style="list-style-type: none">• Migrate SIP Trunks• Replicate system configurations: Call control<ul style="list-style-type: none">◦ Replicate Settings of Inbound Route◦ Replicate Settings of Outbound Route◦ Replicate Settings of Emergency Number
Phase 5	Migrate IP phones
	<ul style="list-style-type: none">• Migrate IP Phones to Yeastar P-Series Software Edition


	<ul style="list-style-type: none"> • Migrate IP Phones to Yeastar P-Series Cloud Edition
Phase 6	Launch & More
	<ul style="list-style-type: none"> • Introduce Yeastar Phone System to Your Clients
	<ul style="list-style-type: none"> • Manage and Maintain Your PBXs on YCM
	<ul style="list-style-type: none"> • Purchase Services for PBXs on Yeastar Partner Portal
	<ul style="list-style-type: none"> • 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

Item	Included
User account	
Account information: <ul style="list-style-type: none">• Extension number• User name• Phone number• Email address	✓
Basic settings: <ul style="list-style-type: none">• Whether to enable voicemail• Voicemail pin• IP phone registration credentials	✓
Preference & advanced settings: <ul style="list-style-type: none">• Status and forwarding rules• BLF keys• User role	✗ <div data-bbox="862 1276 1385 1493"> Note: After-migration, users can set their status, forwarding rules, and BLF keys, while system administrators can create and assign user roles.</div>
Contacts	
Contact information:	✓
Basic settings	
Global business hours & holidays	✓
Voice prompt files	✓

Item		Included
		 Note: To upload voice prompt files, you need to obtain the audio files from your client in advance.
Call feature settings		
	Digital receptionists (IVR)	✓
	Ring groups	✓
	Call queue	✓
	Voicemail	✓
System security settings		
	Allowed country codes	✓
	Blacklisted numbers	✓
	IP Blacklist	✓
SIP trunks		
	Basic information: <ul style="list-style-type: none"> • ITSP hostname • Authentication credential • DID number 	✓
	Advanced settings: <ul style="list-style-type: none"> • Caller ID • Call options • Inbound parameters • Outbound parameters 	✗  Note: After migration, system administrators can configure the advanced settings for SIP trunks as needed.
Call control settings		
	Inbound rules	✓

Item		Included
	Outbound rules	✓
	Emergency number	✓
Integrations		
	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: Confirm with your client whether to backup the call data.
	Recordings	

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.

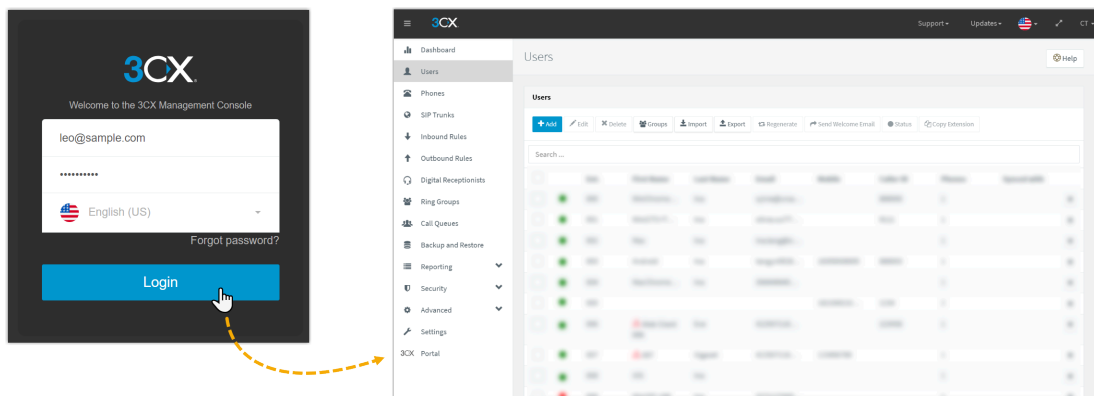
Log in to 3CX Management Console

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

Procedure

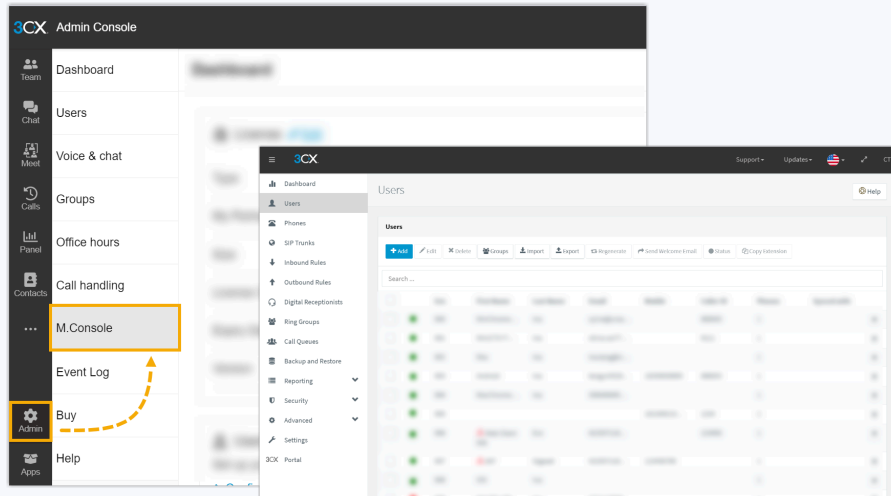
1. Obtain the following information from your client:
 - Login address of your client's 3CX Management Console
 - Login credentials of a 3CX account with the role **Owner** (3CX FREE/SMB edition) or **System Admin** (3CX Dedicated Instances)
2. Access login address and log in with the obtained credential.

You will be directed to 3CX Management Console.



**Note:**

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

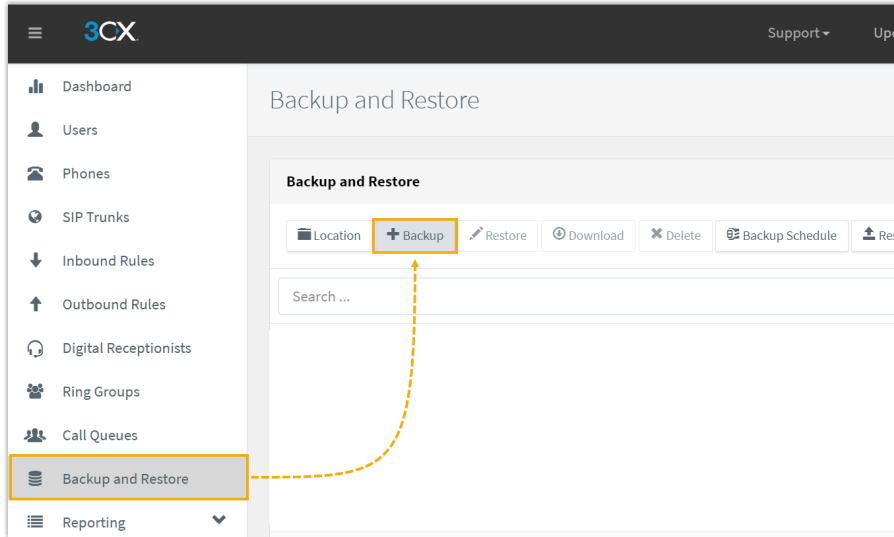


Backup 3CX Data

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**.



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

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.

Platform	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.



Tip:

Contact Yeastar Sales or go to [Yeastar Partner Portal](#) to apply for a P-Series SE license. After you complete payment, an activation code will be provided.

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

Activation Information

Online Offline

* Activation Code

← Previous Save Activate

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

Activate the PBX offline

Activation Information

1 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.

2 [Download Request File](#)

* Activation Code

3

4 [Previous](#) [Skip](#) [Activate](#)

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  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.

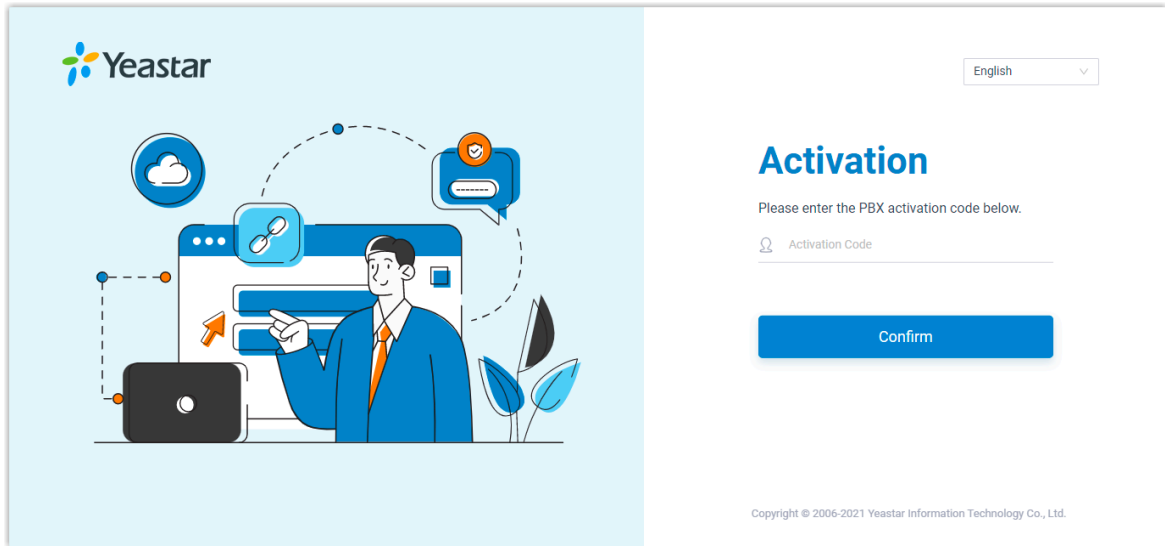
- **PBX Login URL:** [https://\[redacted\].yeastarcloud.com](https://[redacted].yeastarcloud.com)
- **PBX Activation Code:** BWtGrDg9
- **PBX Activation URL:**
[https://\[redacted\].yeastarcloud.com/activation?code=5G9YEzXzkhfPsDEOGNYIMfHIVSDaVRtXRcWKgUEhx6D2eolJFGTrU2n07qBtGK9u](https://[redacted].yeastarcloud.com/activation?code=5G9YEzXzkhfPsDEOGNYIMfHIVSDaVRtXRcWKgUEhx6D2eolJFGTrU2n07qBtGK9u)

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.



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.
2. 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  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.

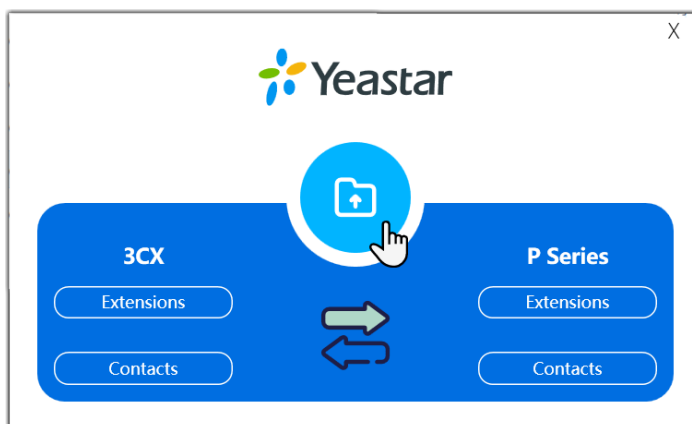
Step 1. Export user data from 3CX


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**.

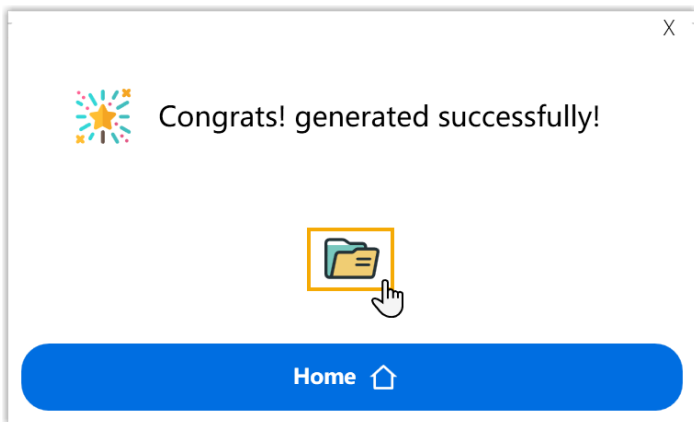
A csv file that contains information of all selected users are saved to your computer.

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  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.

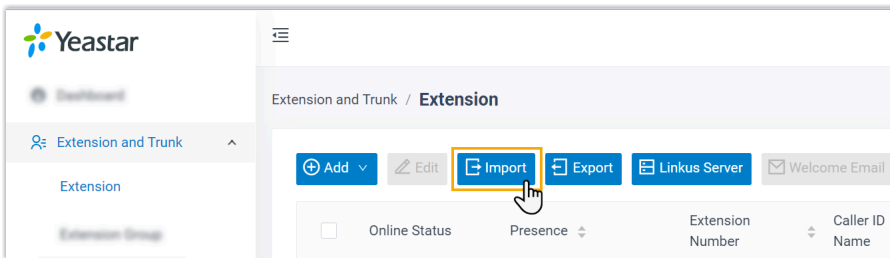


The generated files are named as **pae_pse_extensions_xxx.csv** and **pce_extensions_xxx.csv**.

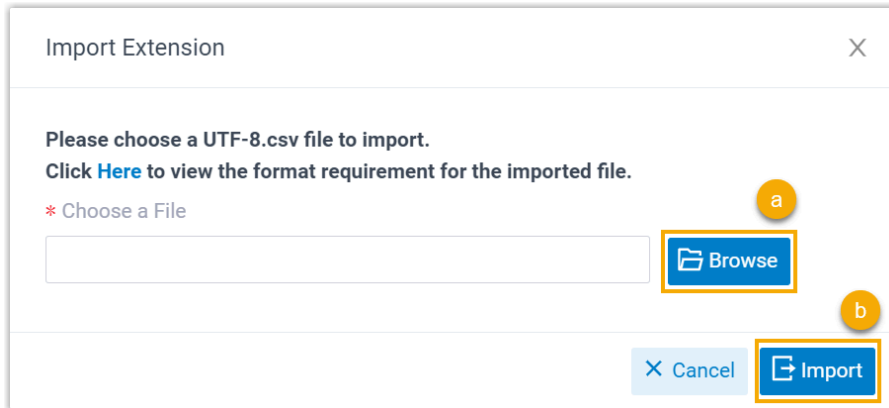
 3cx_extensions.csv	2024/3/1 16:07	XLS
 pae_pse_extensions_1710745634996.csv	2024/3/18 15:07	XLS
 pce_extensions_1710745635001.csv	2024/3/18 15:07	XLS

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**.



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 **paе_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.

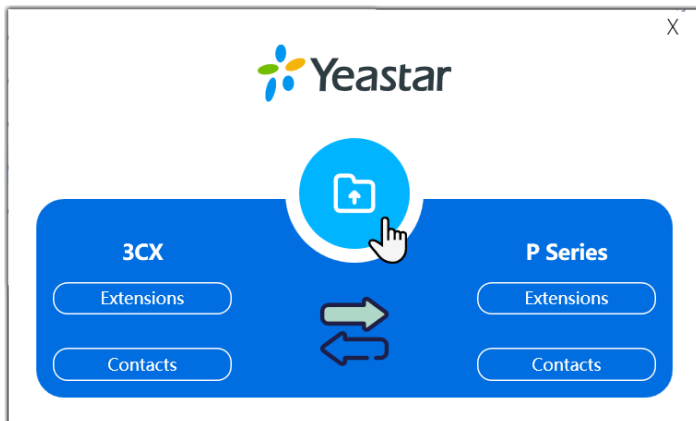
Step 1. Export contacts information from 3CX


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**.

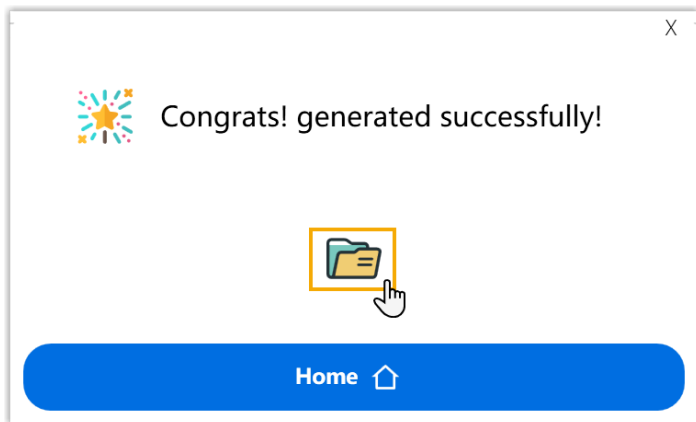
A csv file that contains information of all selected contacts are saved to your computer.

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  to select the folder where the [exported 3CX contacts file](#) is located.



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.

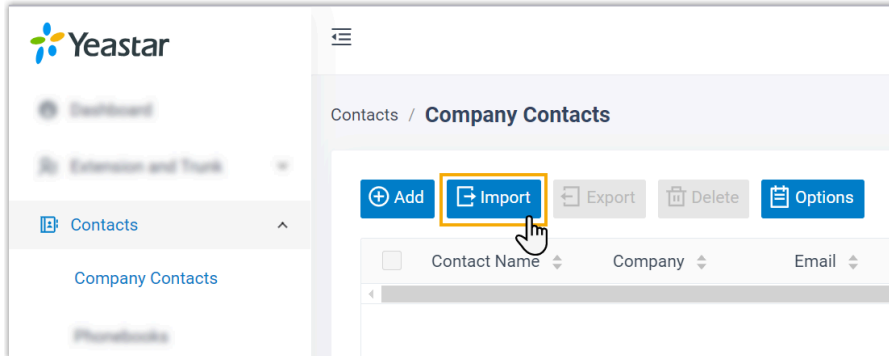


The generated files are named as **p_contacts_xxx.csv**.

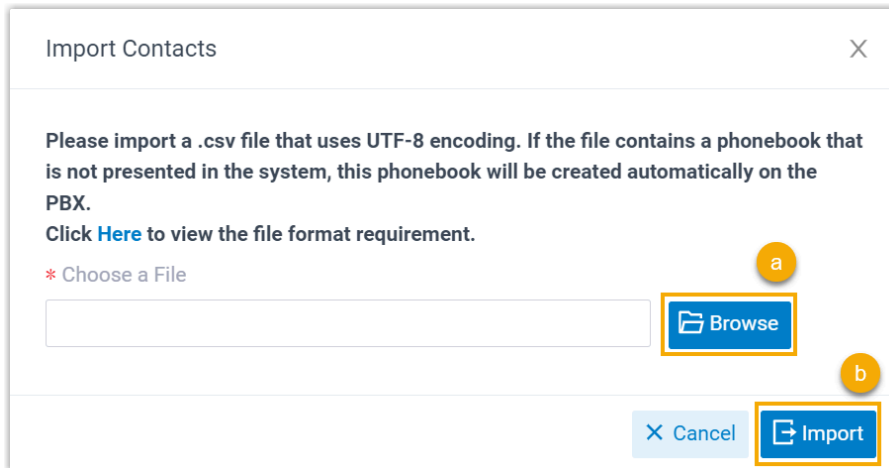
 contacts.csv	2024/3/18 15:56	XLS
 p_contacts_1710748620935.csv	2024/3/18 15:57	XLS

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.



- 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.

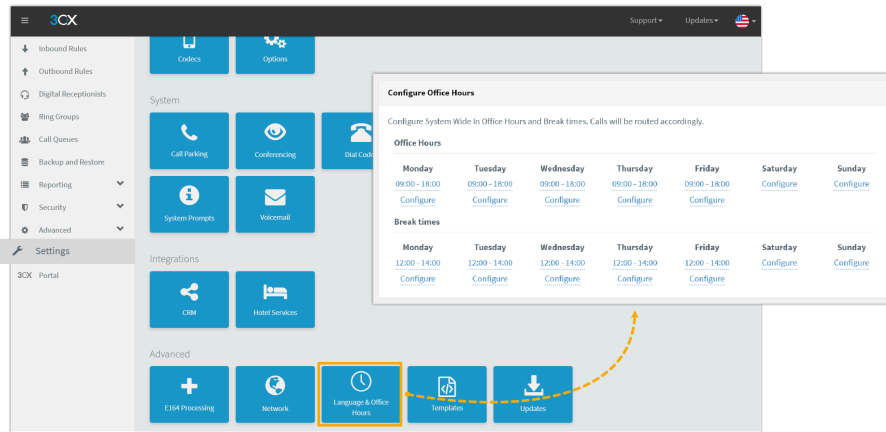
Replicate Basic System Settings

Replicate Settings of Business hours & holidays

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

Replicate global business hours

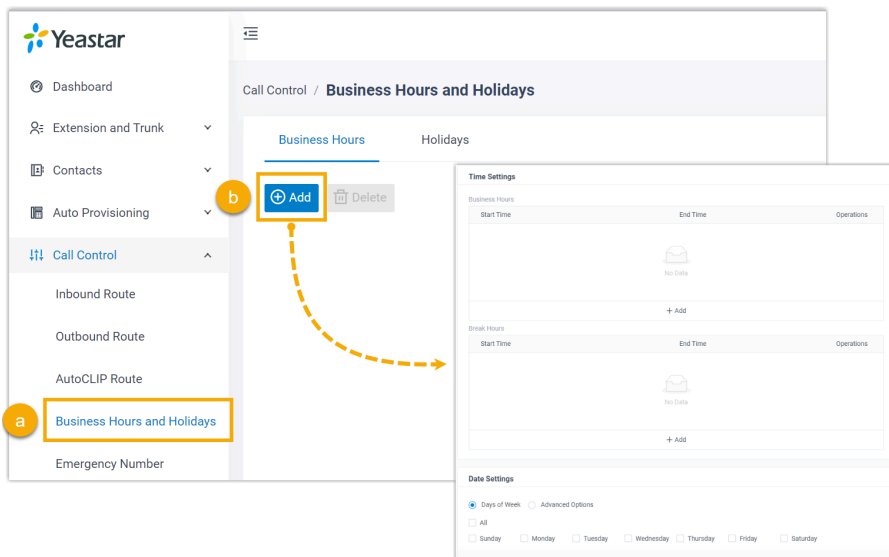
1. View the existing settings on 3CX Management Console.



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.



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.

The 3CX 'Configure Office Hours' screen shows a table with columns for days of the week and rows for 'Office Hours' and 'Break times'. The 'Office Hours' row for Monday-Friday is highlighted in orange. The Yeastar 'Time Settings' screen shows 'Date Settings' with 'Days of Week' selected and checkboxes for Monday through Friday checked. A dashed orange line connects the 'Days of Week' section in Yeastar to the 'Office Hours' table in 3CX.

b. Copy settings for office hours and break times.

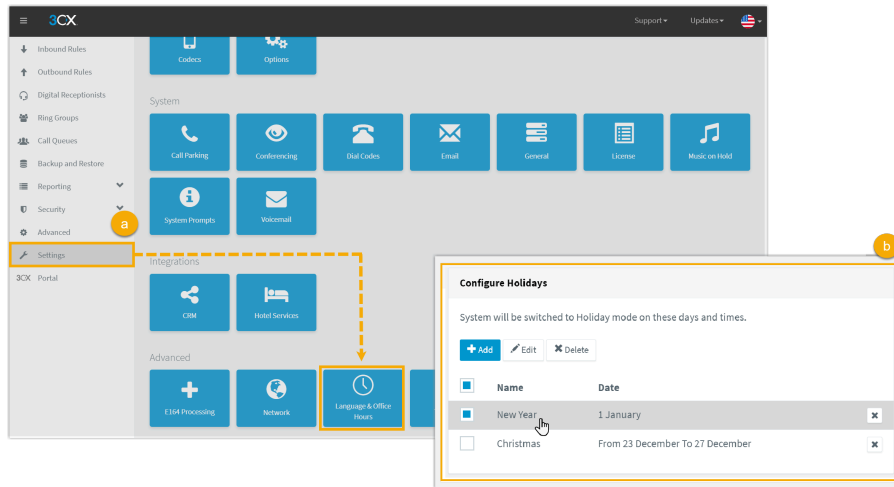
The 3CX 'Configure Office Hours' screen shows the 'Office Hours' table with Monday-Friday highlighted in orange and 'Break times' highlighted in green. The Yeastar 'Time Settings' screen shows 'Business Hours' and 'Break Hours' sections. A dashed orange line connects the 09:00-18:00 range in 3CX to the Business Hours Start/End time inputs in Yeastar. A dashed green line connects the 12:00-14:00 range in 3CX to the Break Hours Start/End time inputs in Yeastar.

 **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

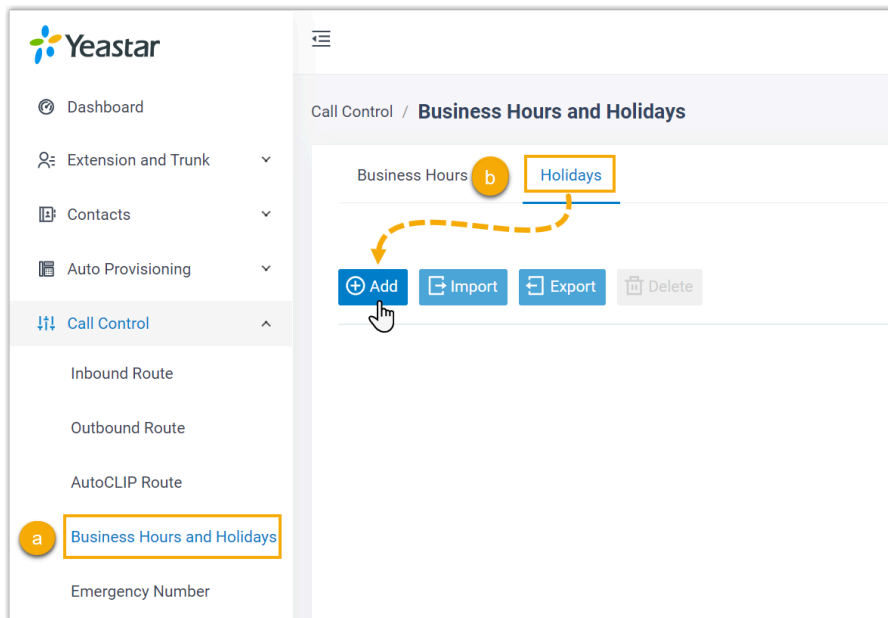
1. View the existing settings on 3CX Management Console.



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

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

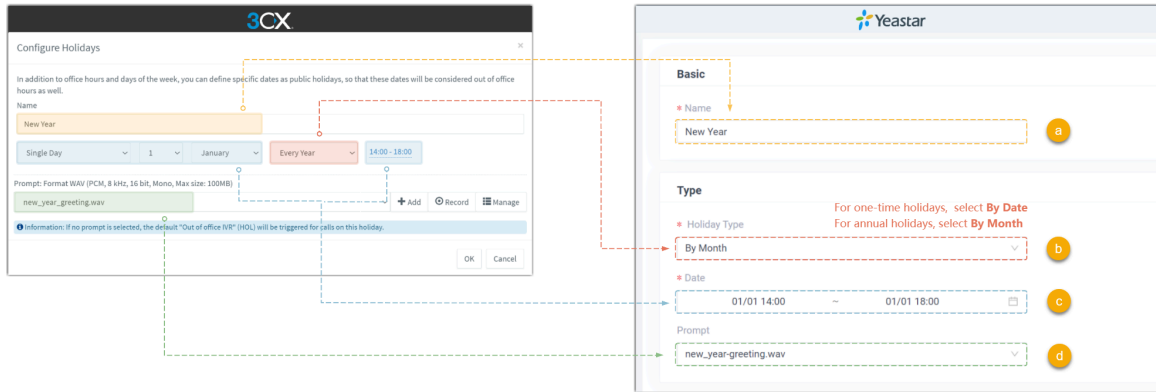
2. Create holidays on Yeastar Management portal.



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.



- 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).

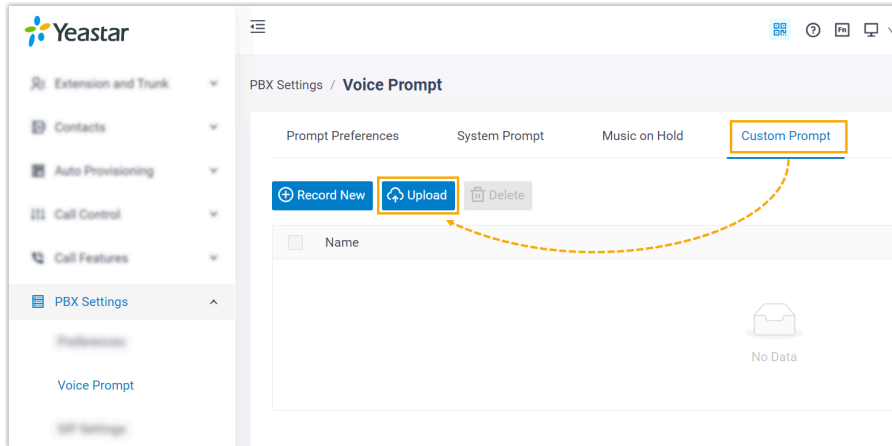
Prerequisites

- 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	<p>.wav, .mp3, or .gsm</p> <ul style="list-style-type: none"> ◦ PCM, 8K, 16bit, 128kbps ◦ A-law(g.711), 8k, 8bit, 64kbps ◦ u-law(g.711), 8k, 8bit, 64kbps <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Tip: If file format does not meet the requirement, you can convert audio files via WavePad or G711 File Converter online.</p> </div>
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**.

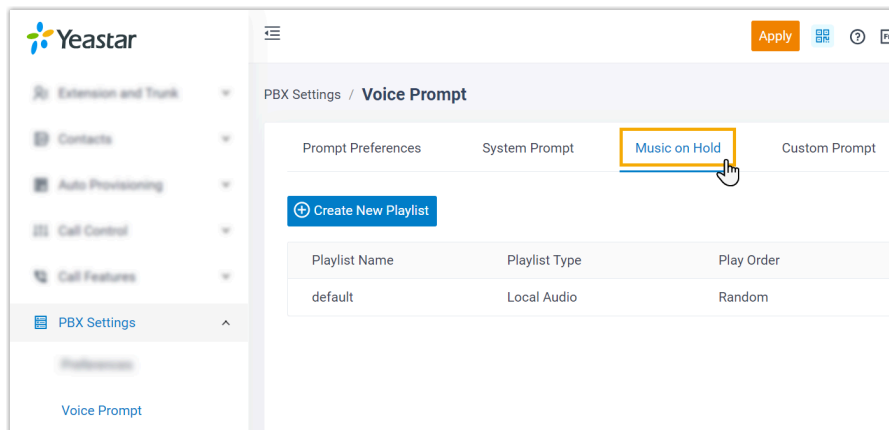


3. In the pop-up window, select an audio file from your local PC and click **Upload**.

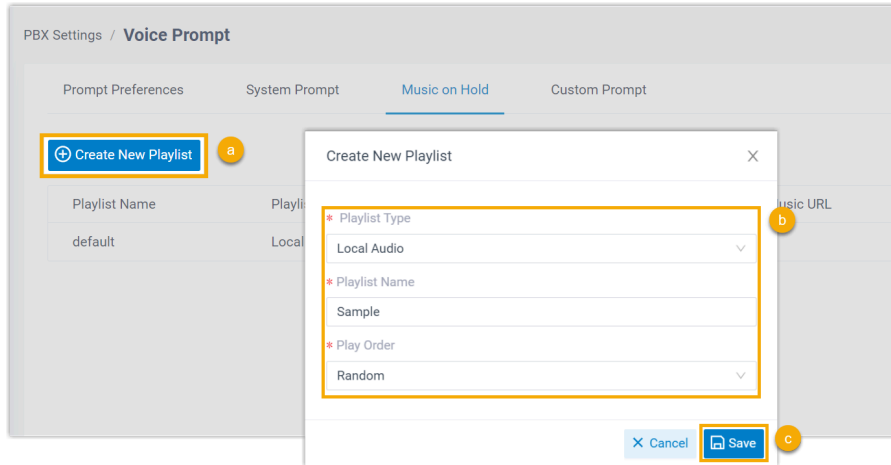
Upload MOH prompts


Step1. Add a MoH playlist

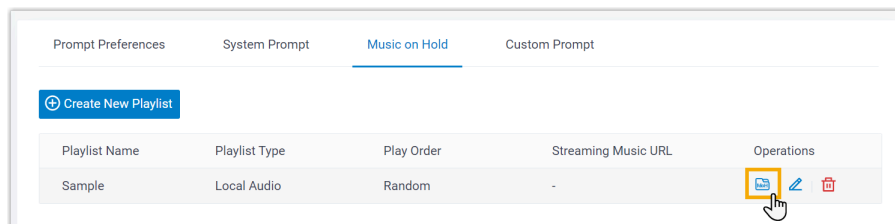
1. Log in to PBX Management Portal.
2. Go to **PBX Settings > Voice Prompt > Music on Hold**.



3. Create a new playlist.

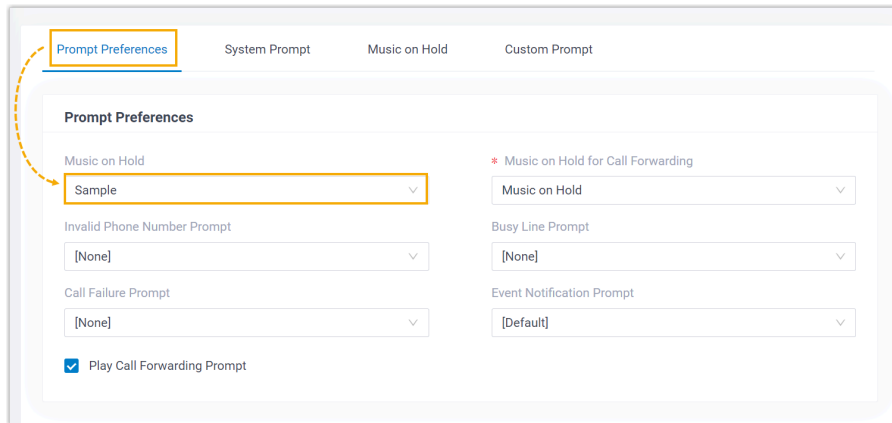


- a. Click **Create New Playlist**.
 - b. In the pop-up window, configure the playlist.
 - **Playlist Type:** Select **Local Audio**.
 - **Playlist Name:** Enter a name to help you identify it.
 - **Play Order:** Decide whether to play the playlist alphabetical-ly or randomly.
 - c. Click **Save**.
4.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



- 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



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

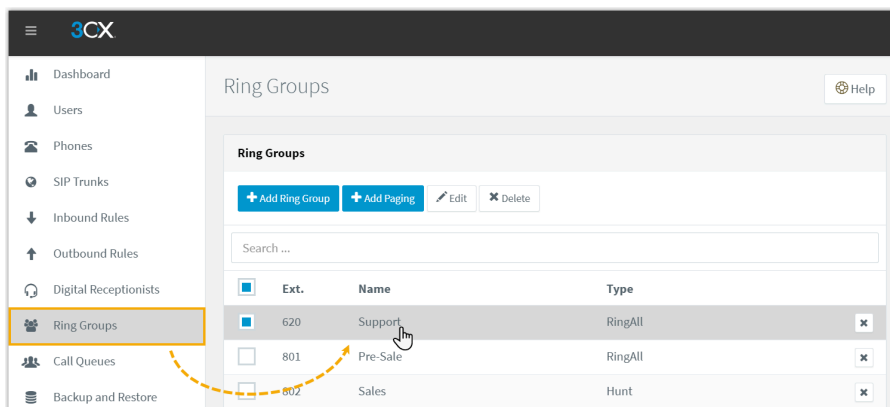
Replicate Settings of Ring Groups

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

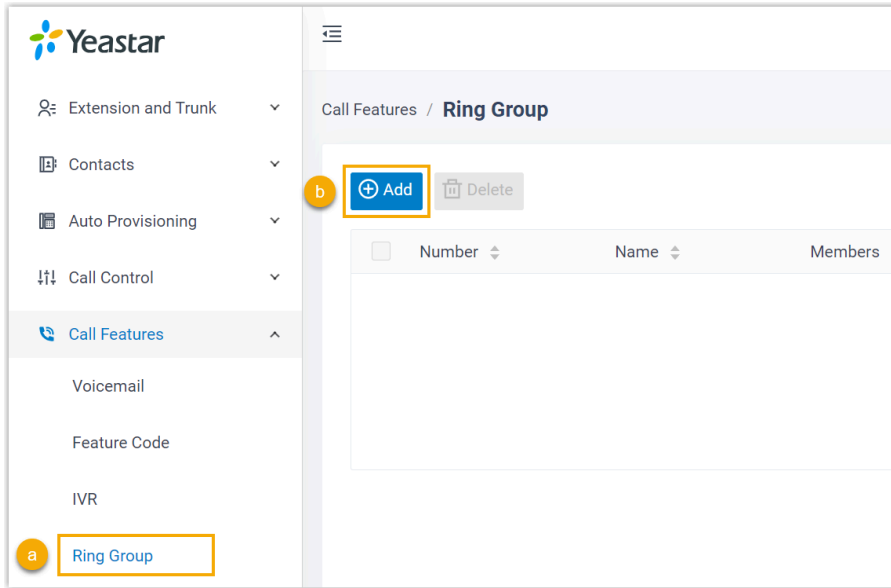
Procedure

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

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



2. Create a new ring group on Yeastar Management Portal.



- a. Go to **Call Features > Ring Group**.
 - b. Click **Add**.
3. On Yeastar Management Portal, replicate the ring group settings from 3CX.

The diagram illustrates the migration of ring group settings from 3CX to Yeastar. It shows two screenshots: the 3CX interface on the left and the Yeastar interface on the right. Callouts 'a', 'b', and 'c' indicate specific configuration points.

3CX Screenshot: Shows the 'General' tab for a ring group. The 'Name' is 'Support', 'Virtual Extension Number' is '620', 'Ring Strategy' is 'Ring All', and 'Ring Time (Seconds)' is '20'. The 'Group Members' section shows a list of members with columns for 'Ext.', 'First Name', and 'Last Name'. The 'Destination if no answer' is set to 'End Call'.

Yeastar Screenshot: Shows the 'Add' configuration page. The 'Number' is '620', 'Name' is 'Support', 'Ring Strategy' is 'Ring All', and 'Ring Timeout (s)' is '20'. The 'Members' section shows a list of members with columns for 'Extension N.', 'Caller ID Na.', and 'Caller ID Na.'. The 'Fallover Destination' is set to 'Hang Up'.

Mapping Table:

Mapping Table	
3CX	Yeastar
End Call	Hang Up
Connect to Extension	Extension
Voicemail Box for Extension	Extension Voicemail
Connect to Digital Receptionist	IVR
Connect to Queue / Ring Group	Queue / Ring Group
Forward to Outside Number	External Number

- 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.

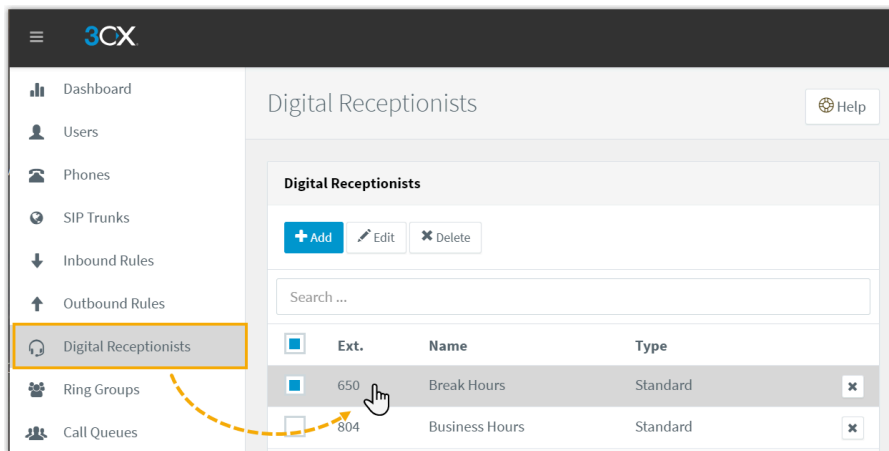
Restrictions

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

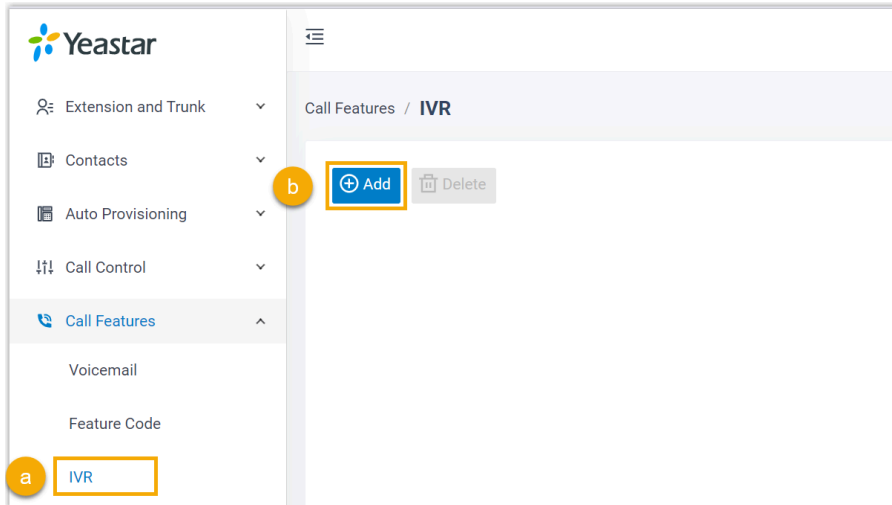
Procedure

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

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



2. Create an IVR on Yeastar Management Portal.



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

Mapping Table		
	3CX	Yeastar
Press 3	Nothing	[None]
Press 4	Nothing	[None]
Press 5	End Call	Hang Up
Press 6	Connect to Extension	Extension
Press 6	Connect to Ring Group	Ring Group
Press 6	Connect to Queue	Queue
Press 7	Connect to Digital Receptionist	IVR
Press 8	Transfer to Voicemail	Extension Voicemail
Press 8	Call By Name	Dial By Name
Press 9	Repeat Prompt	Play Prompt and Return to IVR
Press #	Play Prompt and Exit	Play Prompt and Exit

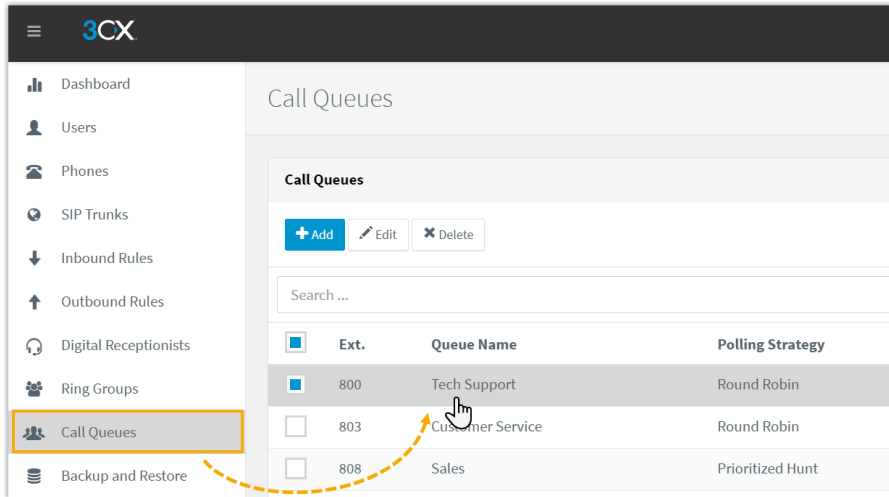
- a. Copy IVR's name, extension, and prompt.
 - b. Select the **Key Press Event** tab.
 - c. Set the key press events accordingly.
 - d. Set the invalid input destination accordingly.
 - e. Click **Save** and **Apply**.
4. If there are multiple digital receptionists (IVRs) in 3CX, repeat step 2~3.

Replicate Settings of Call Queues

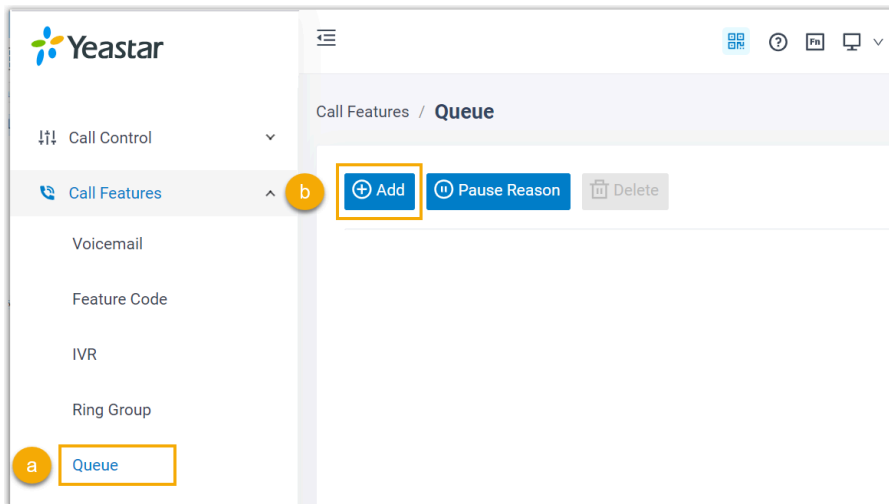
This topic describes how to replicate settings of call queues from 3CX to Yeastar Phone System.

Procedure

1. View the existing settings on 3CX Management Console.
Go to **Call Queues** and select a queue to view its details.



2. Create a call queue on Yeastar Management Portal.



- 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.

The image shows the configuration process for a queue in 3CX and Yeastar. On the left is the 3CX 'General' tab, and on the right is the Yeastar 'Basic' and 'Preferences' tabs. Dashed lines connect corresponding settings between the two systems. Two mapping tables are provided to show the translation of 3CX settings to Yeastar settings.

3CX	Yeastar
800	Tech Support
Round Robin	Round Robin
30	30
1800	1800
Hang Up	Hang Up
30	30
30	30
on_hold_prompt	on_hold_prompt
queue_greeting.wav	queue_greeting.wav
60	60
Standard English Prompts Set	Standard English Prompts Set

3CX	Yeastar
Prioritized Hunt	Linear
Ring All	Ring All
Hunt Random Start	Random
Round Robin	Round Robin
Fewest Answered	Fewest Calls
Other Options	/
End Call	Hang Up
Connect to Extension	Extension
Voicemail Box for Extension	Extension Voicemail
Connect to Digital Receptionist	IVR
Connect to Queue / Ring Group	Queue / Ring Group
Forward to Outside Number	External Number

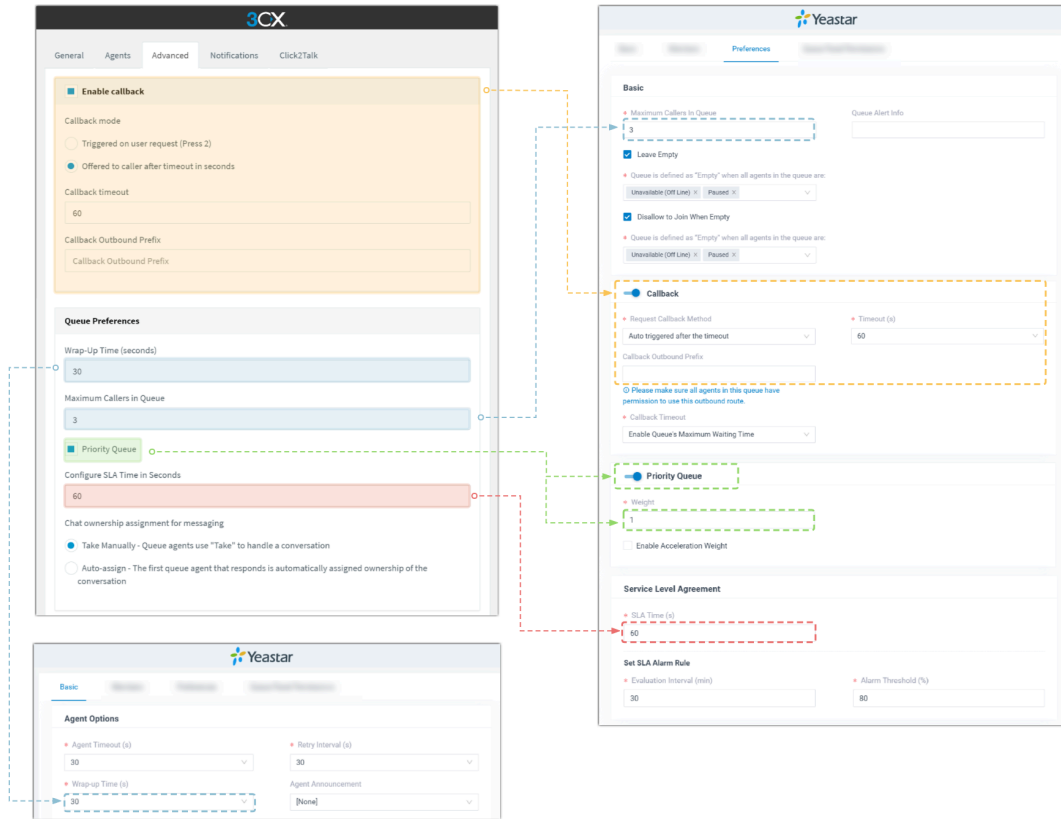
b. In the **Members** tab, select agents for the queue.

The image shows the agent selection process. On the left is the 3CX 'Call Queue Agents' tab, and on the right is the Yeastar 'Members' tab. Dashed lines connect the selected agents between the two systems.

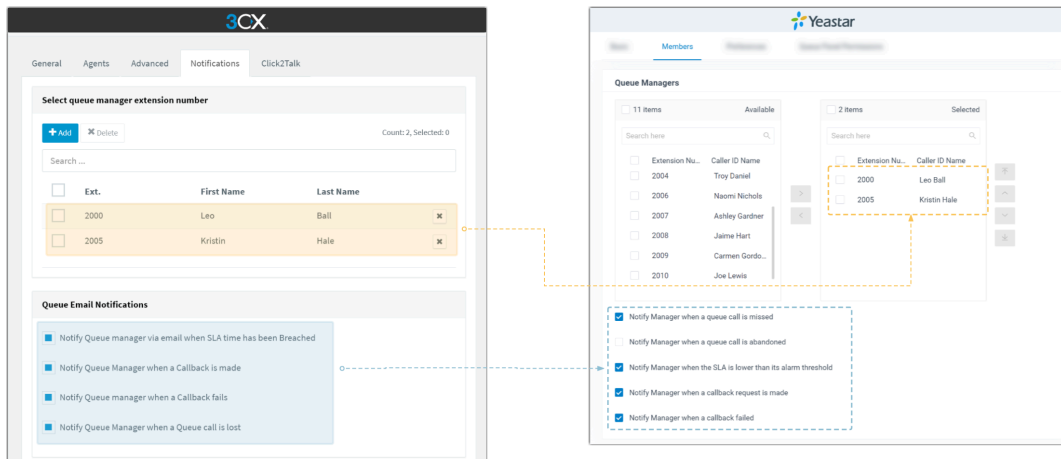
Ext.	First Name	Last Name
2000	Leo	Bull
2001	Phillip	Huff
2002	Terrell	Smith

Extension Number	Caller ID Name
2000	Leo Bull
2001	Phillip Huff
2002	Terrell Smith

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 accordingly.



e. Click **Save** and **Apply**.
 4. If there are multiple call queues in 3CX, repeat step 2~3.

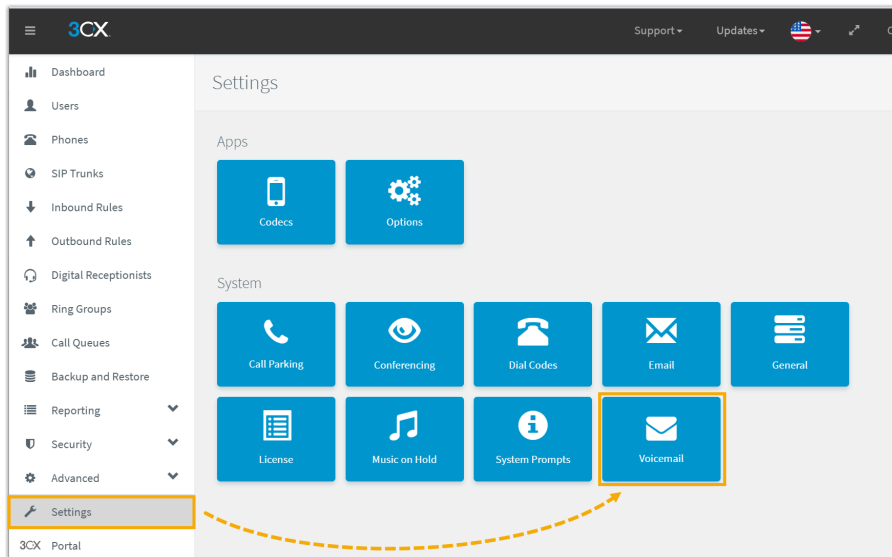
Replicate Settings of Voicemail

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

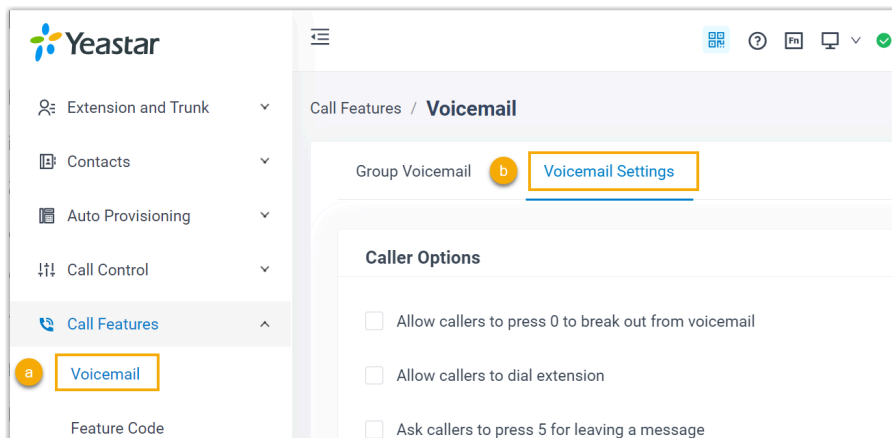
Section

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

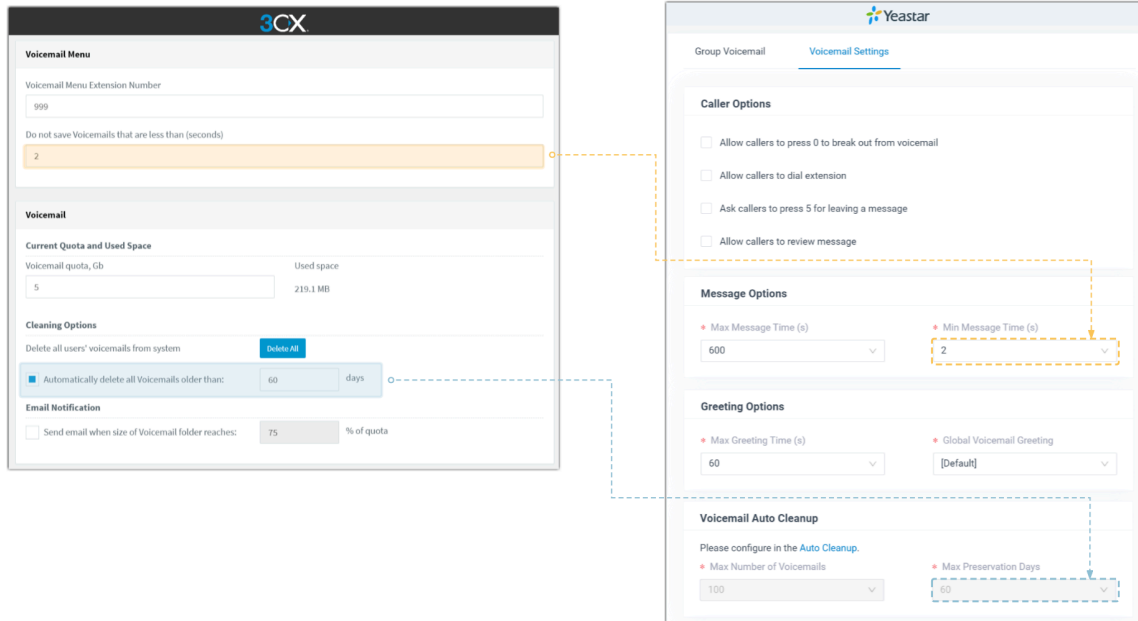
Go to **Settings > System > Voicemail**



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.



4. Click **Save and Apply**.

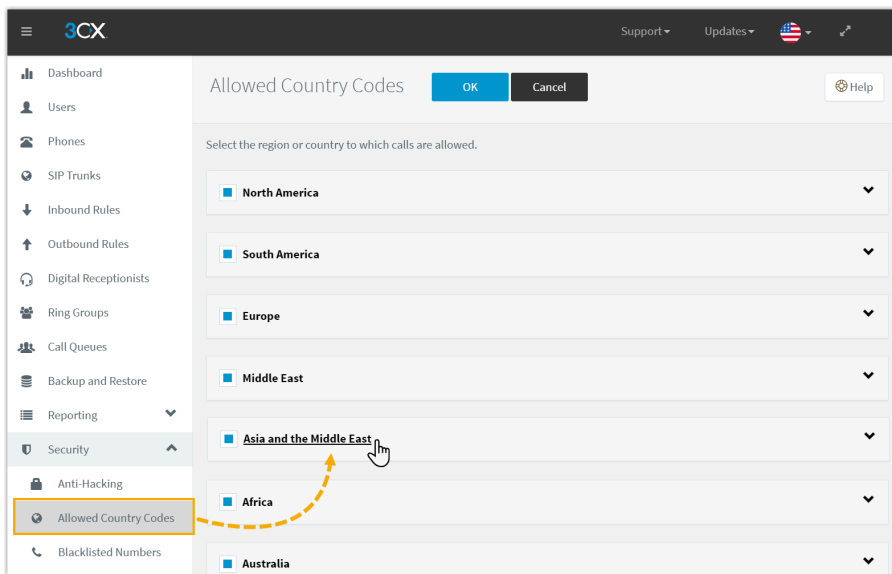
Replicate System Security Settings

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.

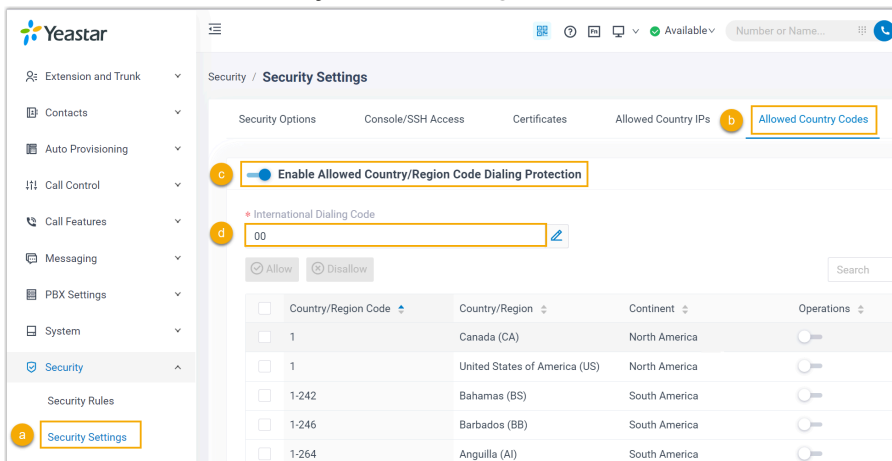
Procedure

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



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.



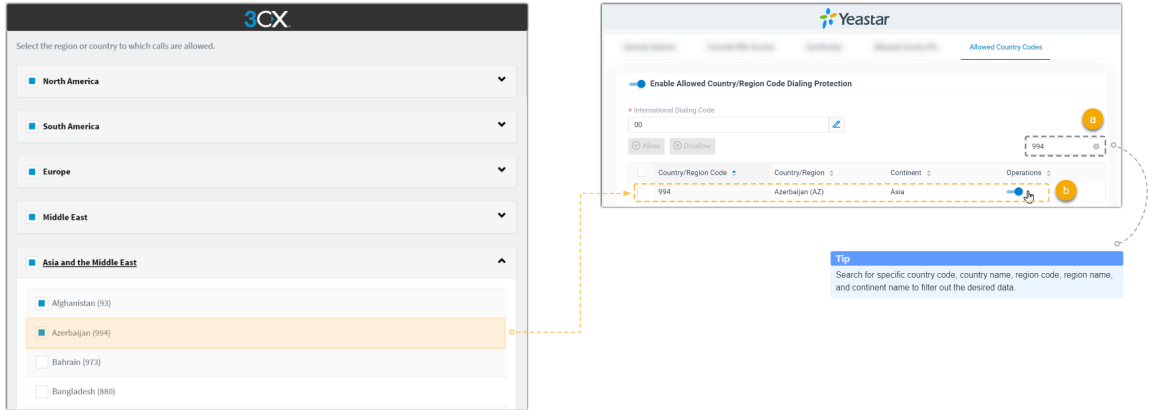
a. Go to **Security > Security Settings**.

b. Select the **Allowed Country Codes** tab.

c. Turn on the switch **Enable Allowed Country/Region Code Dialing Protection**.

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.



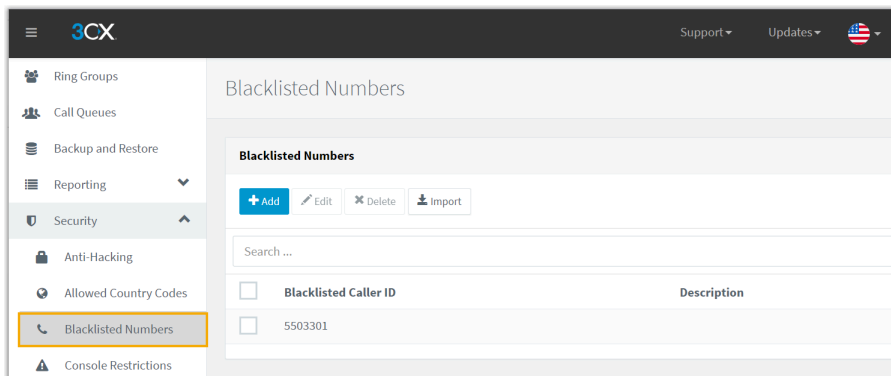
- a. Search for the desired country/region code.
- b. In the **Operations** column, set the status to .
- c. Click **Save** and **Apply**.

Replicate Settings of Blacklisted Numbers

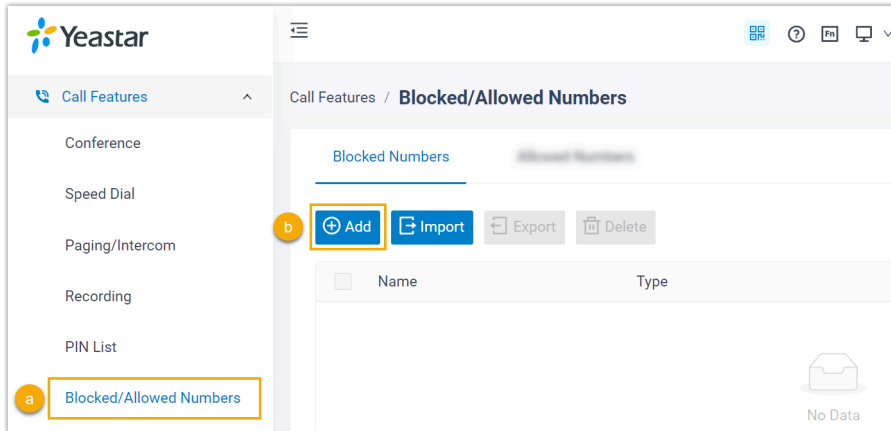
This topic describes how to replicate blocked incoming caller ID from 3CX to Yeastar Phone System.

Procedure

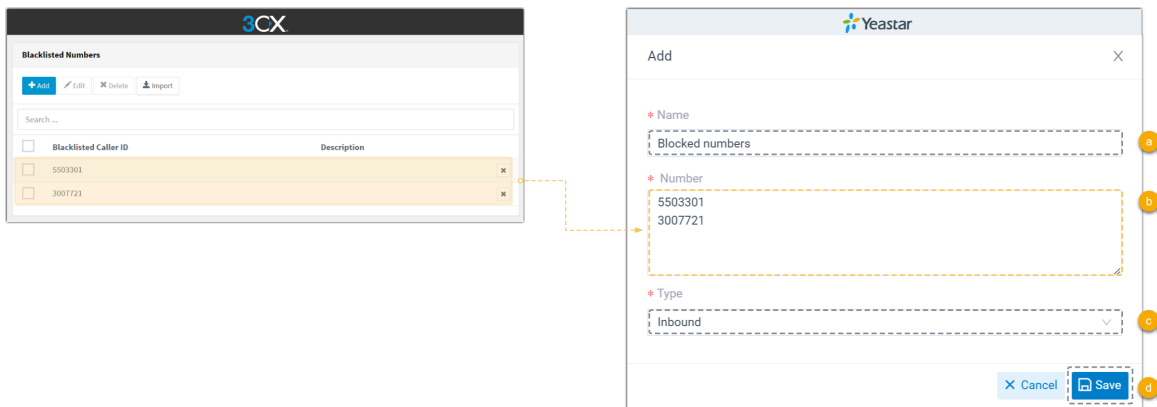
1. View the existing settings on 3CX Management Console.



- Go to **Security** > **Blacklisted Numbers** to view the existing blocked numbers.
2. Create a new blocked number rule on Yeastar Management Portal.



- 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.



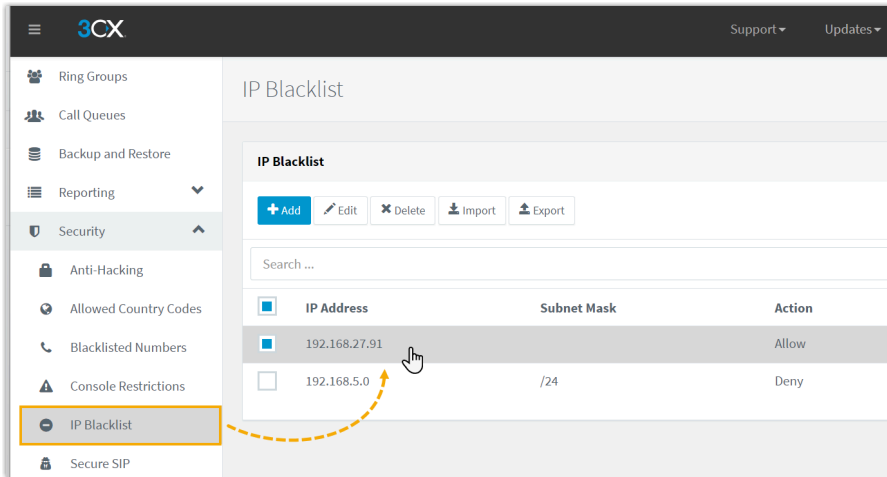
- a. In the **Name** field, specify a name for this blocked number rule.
- b. In the **Number** field, copy the blocked numbers from 3CX.
- c. In the **Type** drop-down list, select **Inbound**.
- d. Click **Save**.

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.

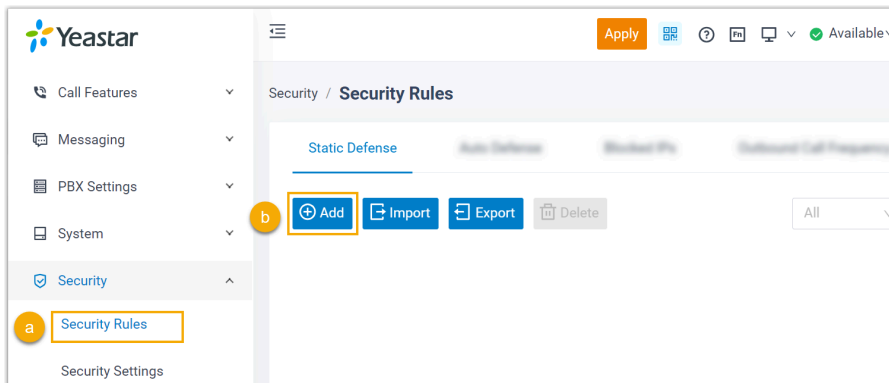
Procedure

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



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.

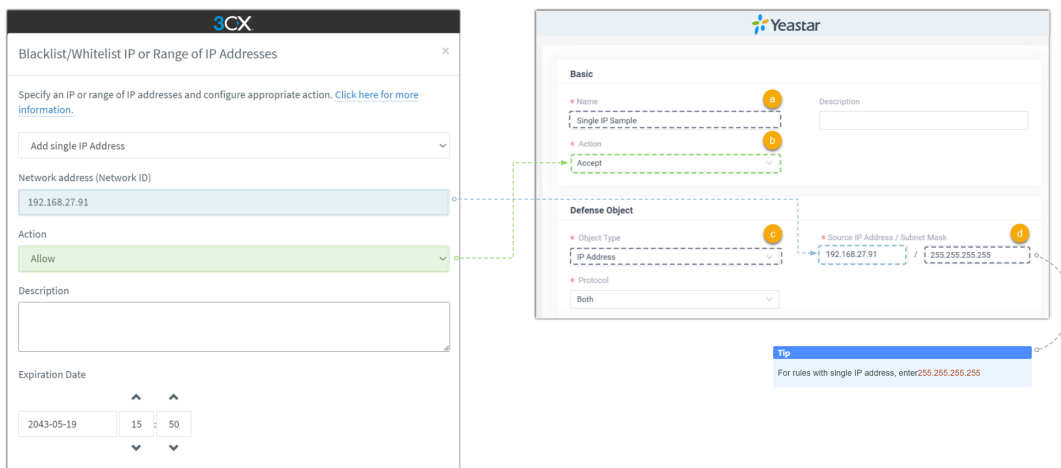


a. Go to **Security > Security Rules**.

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

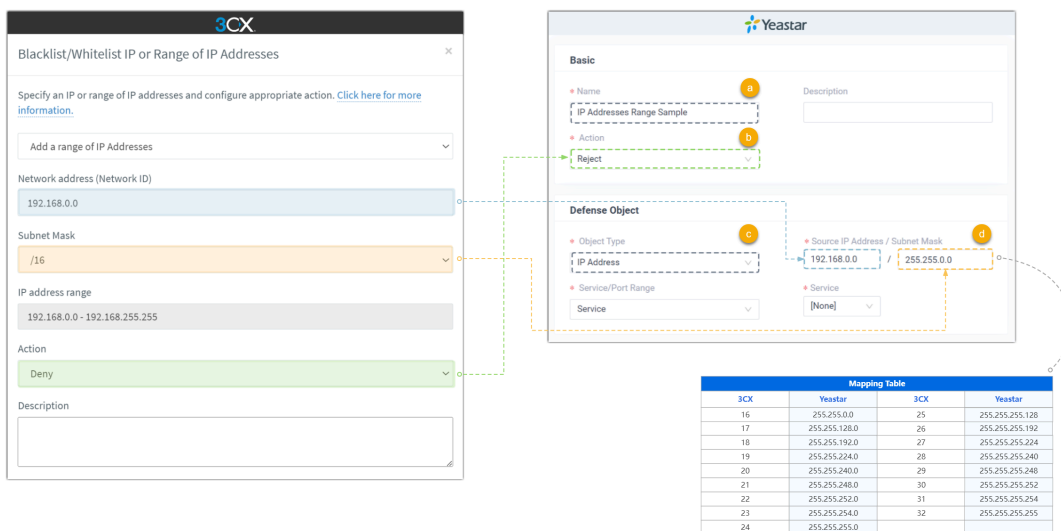
3. On Yeastar Management Portal, replicate the settings from 3CX.

- For single IP address rules, do as follow:



- In the **Name** field, specify a name for this rule.
- In the **Action** drop-down list, select the action according to 3CX setting.
- In the **Object Type** drop-down list, select **IP Address**.
- 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:



- In the **Name** field, specify a name for this rule.
- In the **Action** drop-down list, select the action according to 3CX setting.
- In the **Object Type** drop-down list, select **IP Address**.
- 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

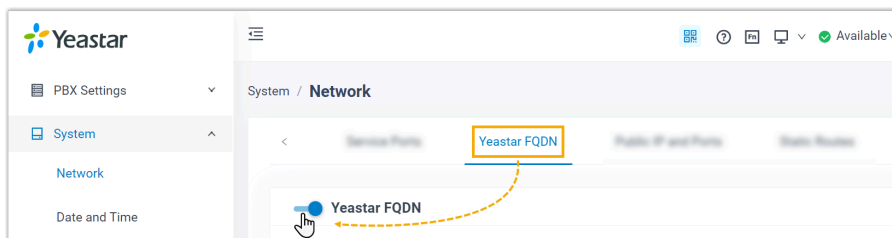
- If users only need to use Linkus within the company's Local Area Network (LAN), you only need to [Enable Linkus clients for users](#).
- If users need to use Linkus outside the company, you need to complete the following settings:
 - [Set up Linkus Server](#)
 - [Enable Linkus clients for users](#)

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

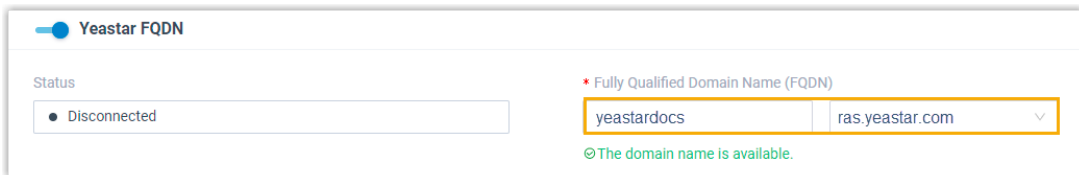
1. Log in to PBX management portal, go to **System > Network**.
2. Select the **Yeastar FQDN** tab, and turn on **Yeastar FQDN**.



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.

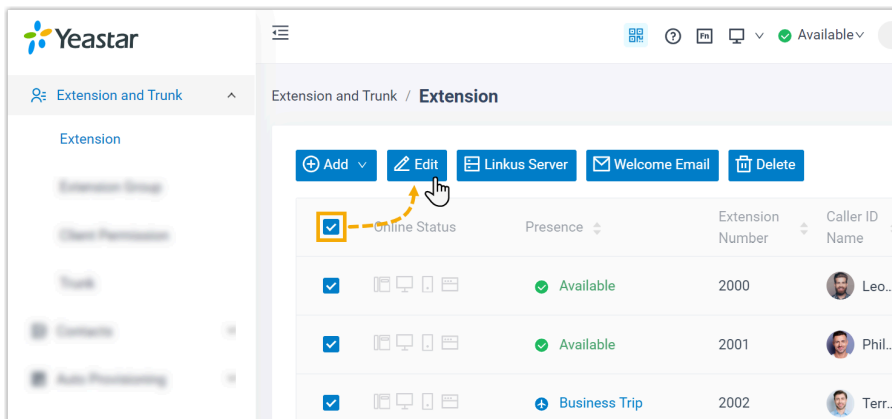
For example, select domain name **ras.yeastar.com** and enter host name `yeas-tardocs`. You will get an FQDN **yeastardocs.ras.yeastar.com**.



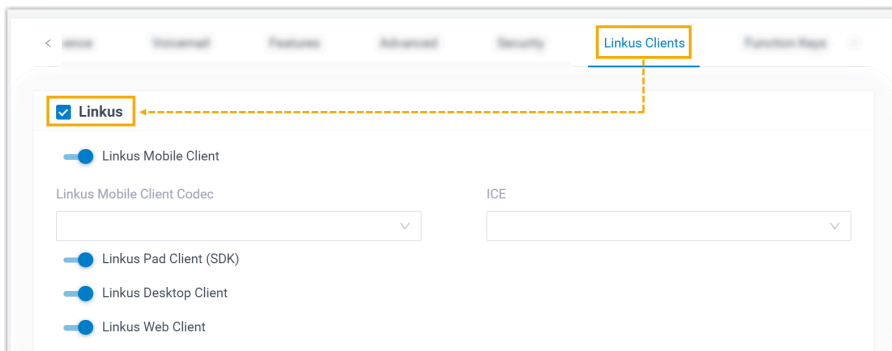
4. Click **Save and Apply**.

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**.

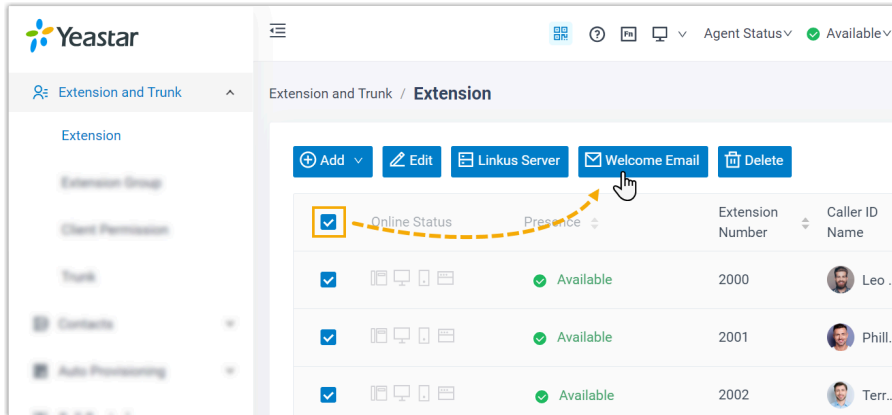


3. Click **Linkus Clients** tab, then select **Linkus**.



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

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

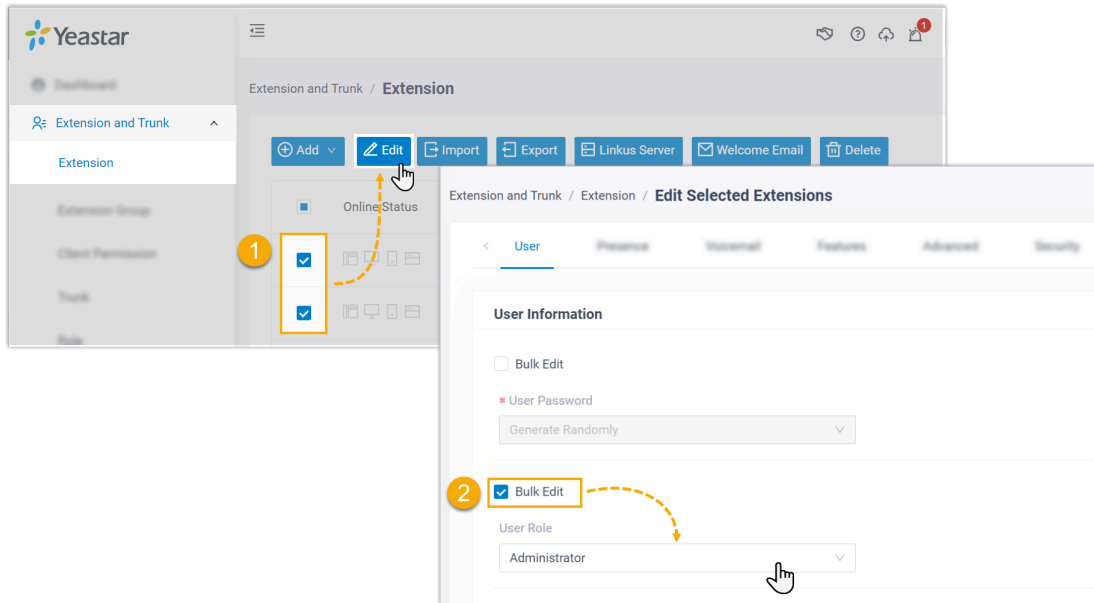


All users will receive the Linkus welcome emails, which contain the login credential for Linkus Clients. After logging in, extension users can make and receive internal calls through Linkus clients.

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



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

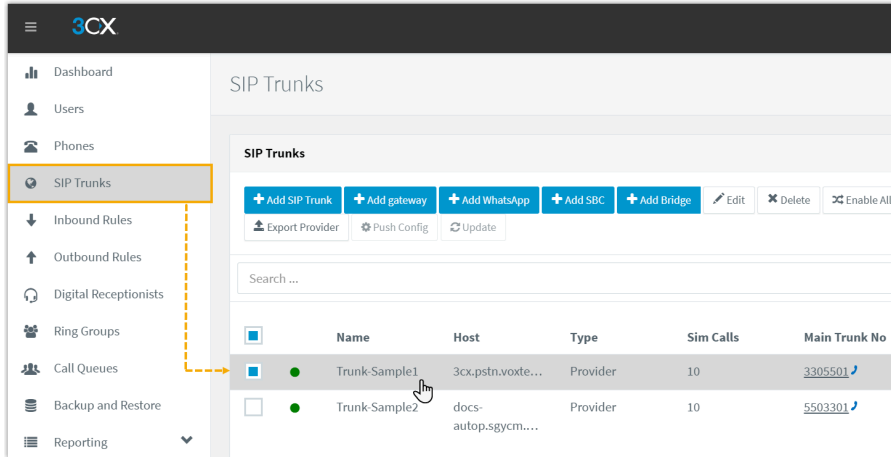
If the SIP trunk providers for migration are NOT listed in [Yeastar ITSP Partners](#), you need to gather the following information of the SIP trunk provider for trunk registration.

- **hostname /IP address**
- **Port**

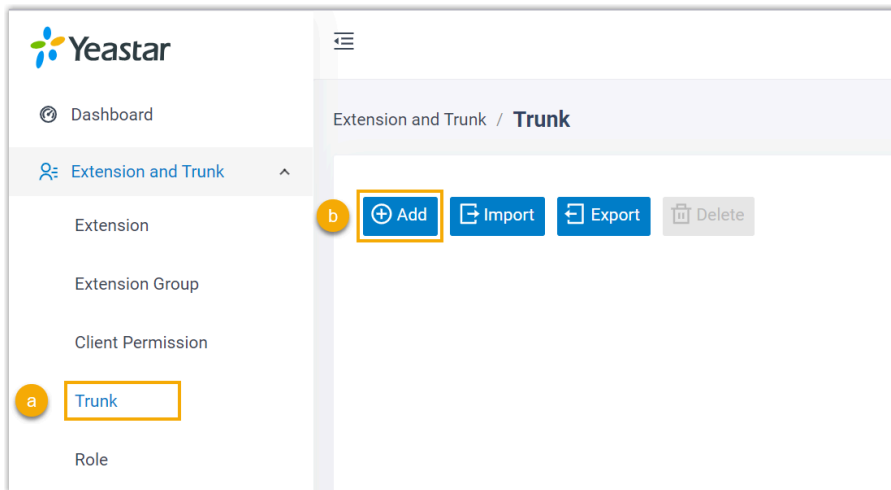
Procedure

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

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



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

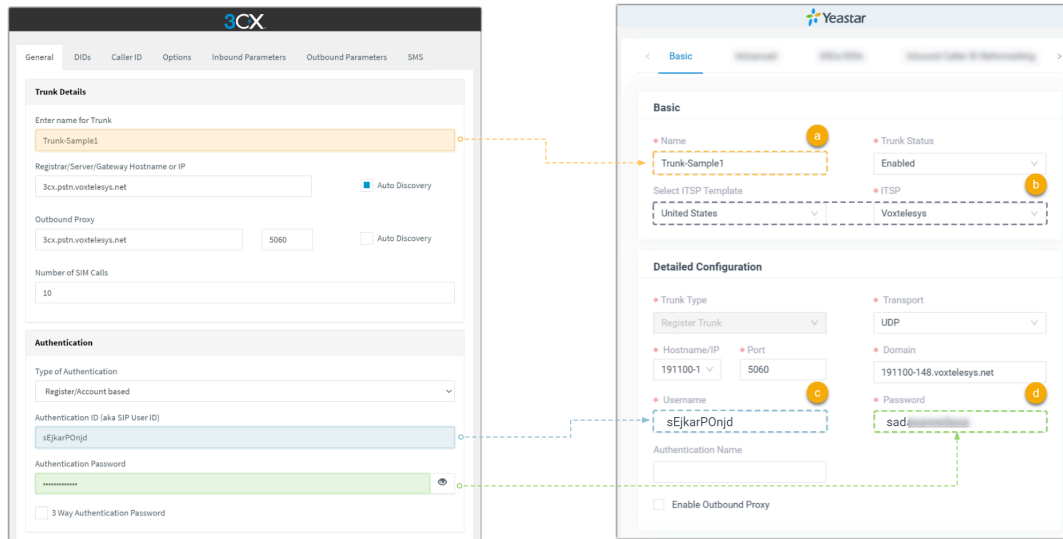


a. Go to **Extension and Trunk > Trunk**.

b. Click **Add**.

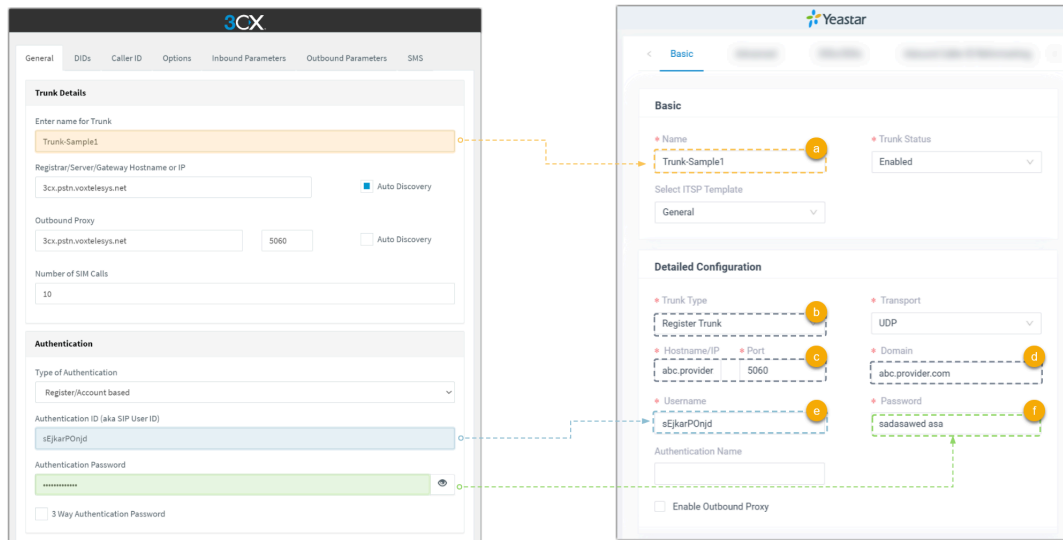
3. On Yeastar Management Portal, replicate the SIP trunk settings from 3CX.

- If the SIP trunk provider is listed in [Yeastar ITSP Partners](#), do as follow:



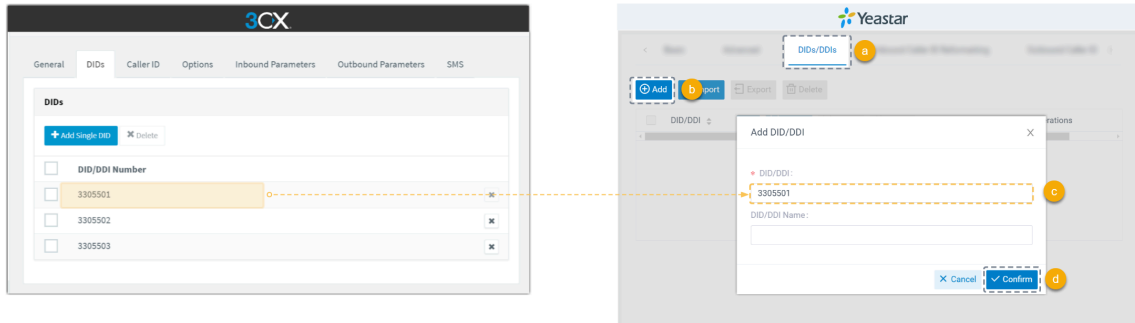
- In the **Name** field, copy the trunk name from 3CX.
- In the **Select ITSP Template** drop-down list, select the country of your ITSP, then select the corresponding ITSP.
- In the **Username** field, copy the Authentication ID from 3CX.
- In the **Password** field, copy the Authentication Password from 3CX.

- If your SIP trunk provider is NOT listed in [Yeastar ITSP Partners](#), do as follow:



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



- 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 2~5.
7. Delete all the migrated SIP trunks on 3CX Management Console.

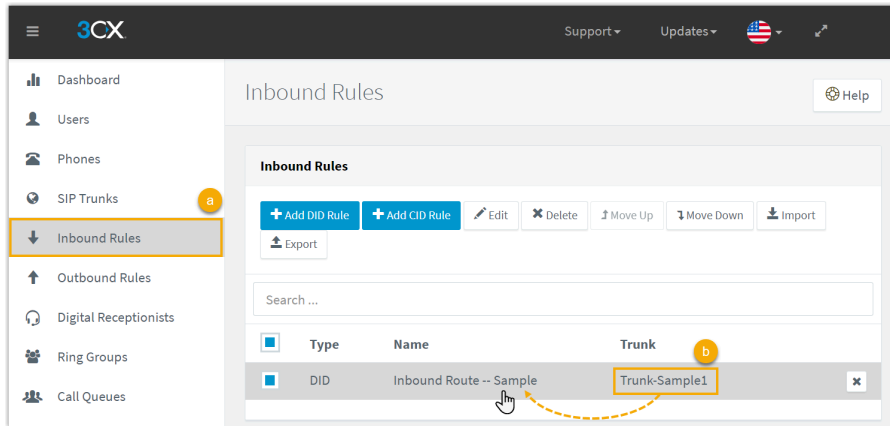
Replicate Settings of Call Control

Replicate Settings of Inbound Route

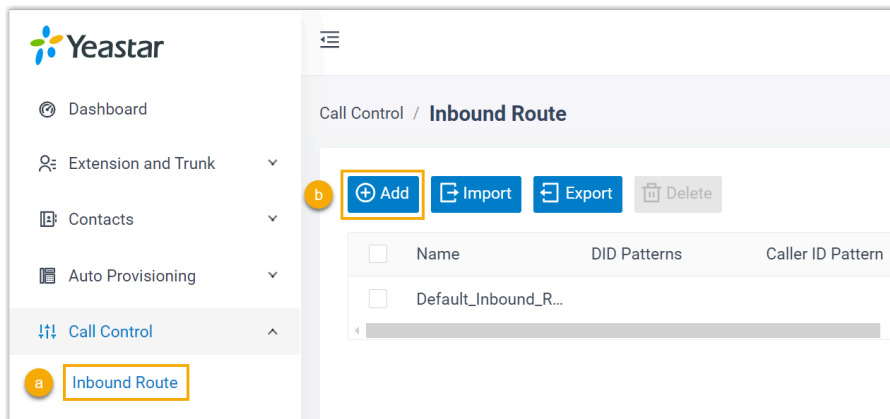
This topic describes how to replicate settings of inbound rules (inbound routes) from 3CX to Yeastar Phone System.

Procedure

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



- 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.



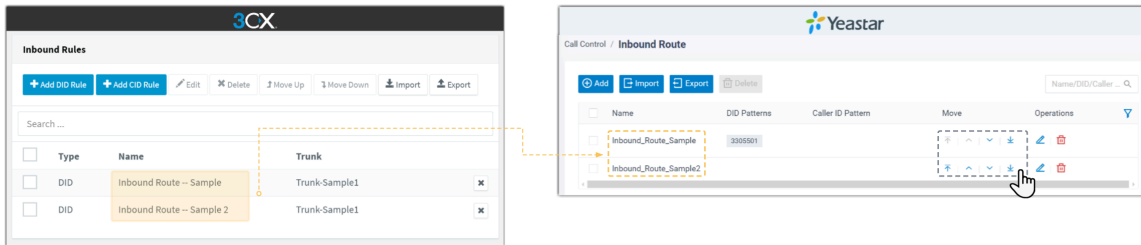
- a. Go to **Call Control > Inbound Route**.
 - b. Click **Add**.
3. On Yeastar Management Portal, replicate the inbound route settings from 3CX.

The image shows a step-by-step migration process from 3CX to Yeastar. On the left, the 3CX interface displays 'Inbound Rules' with a table containing one rule: 'Inbound Route -- Sample' with trunk 'Trunk-Sample1'. Below it, the 'General' settings for this rule show the name 'Inbound Route -- Sample', DID/DDI '3305501', and routing destinations for office hours ('Send Call To Group', 'Tech_Support') and outside office hours ('End Call'). On the right, the Yeastar interface shows the configuration for a new trunk. The 'Name' is 'Inbound_Route_Sample', the 'Trunk' is 'Trunk-Samp...', the 'DID Pattern' is '3305501', and the 'Default Destination' is 'Time Condition' with 'Based on Global Business Hours'. The 'Business Hours Destination' is 'Ring Group' (mapped to 'Tech_Support') and the 'Outside Business Hours Destination' is 'Hang up' (mapped to 'End Call'). A 'Mapping Table' at the bottom right correlates 3CX settings with Yeastar settings.

Mapping Table	
3CX	Yeastar
End Call	Hang Up
Extension	Extension
Voicemail Box for Extension	Extension Voicemail
Send Call to Group	Ring Group
Send Fax to	Enable Fax Detection and specify the fax extension

- 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 2~4.

6. In the inbound route list, click     to adjust the priority according to 3CX.

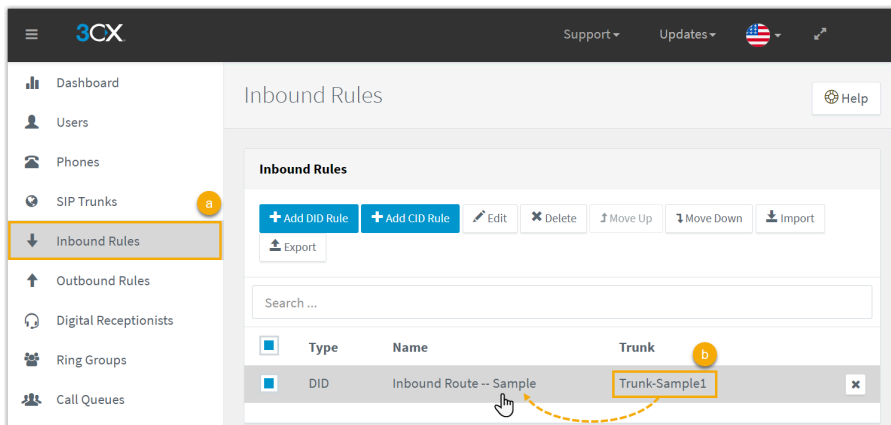


Replicate Settings of Outbound Route

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

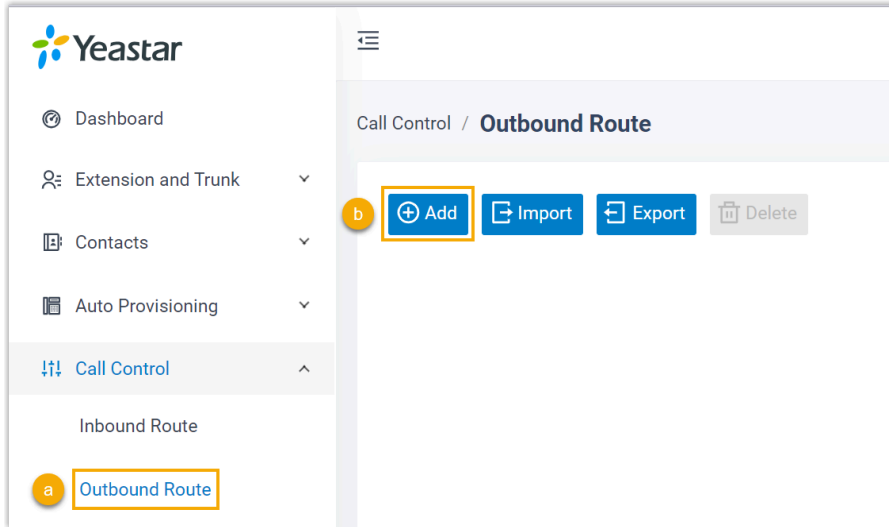
Procedure

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

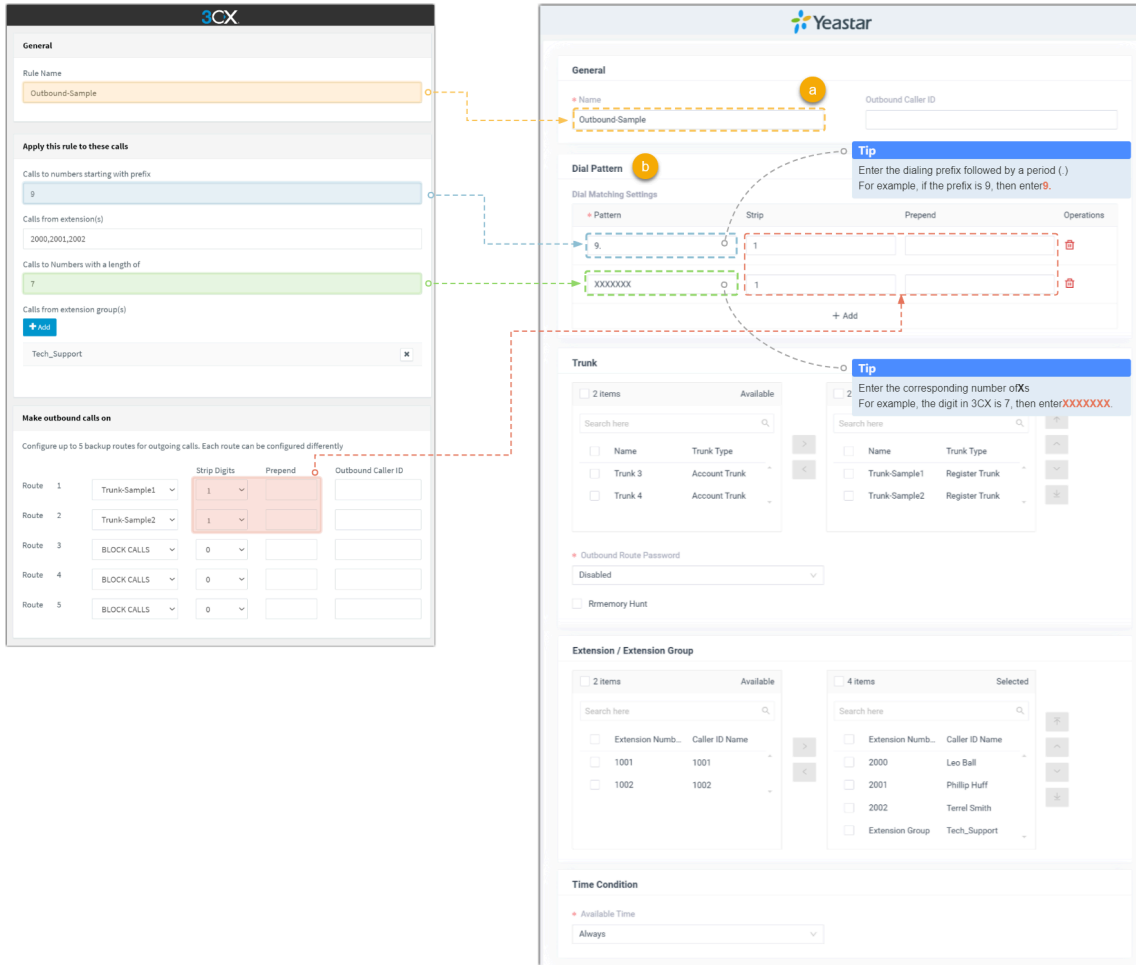


Go to **Outbound Rules**, and select an outbound rule to view its details.

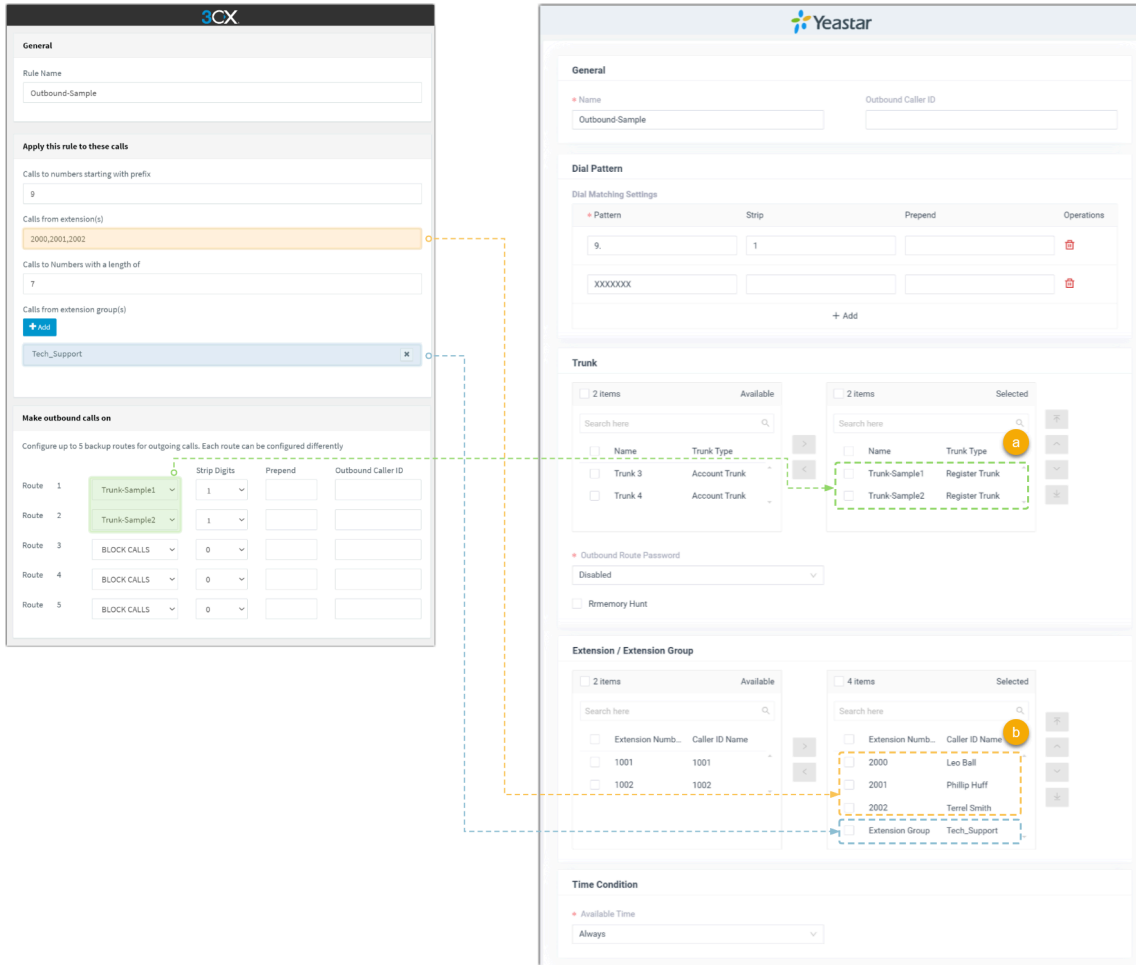
2. Create a new outbound route on Yeastar Management Portal.







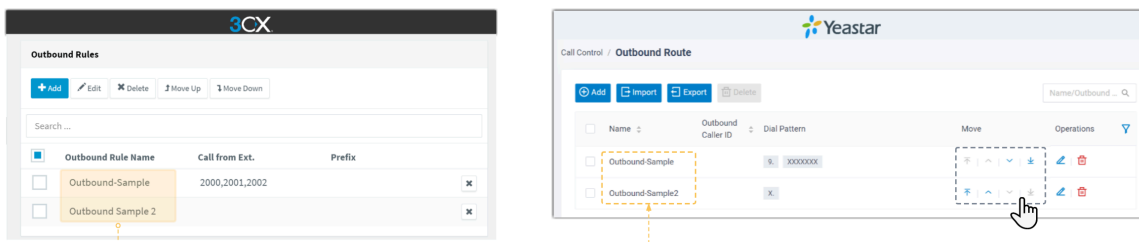
- a. Go to **Call Control > Outbound Route**.
 - b. Click **Add**.
3. On Yeastar Management Portal, replicate the outbound route trigger settings from 3CX.



- 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 **x**s.
 For example, the digit in 3CX is **7**, then enter **xxxxxxx** 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.



- 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 2~5.
 7. In the outbound route list, click     to adjust the priority according to 3CX.

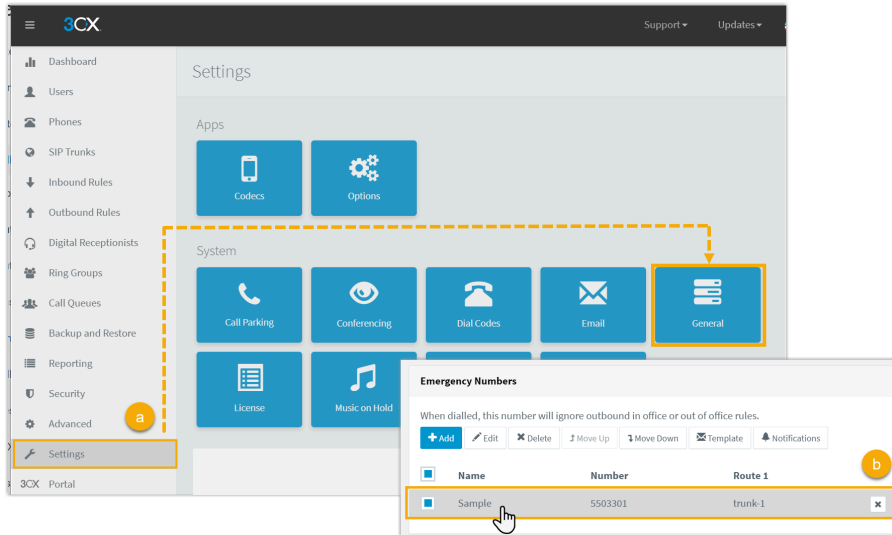


Replicate Settings of Emergency Number

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

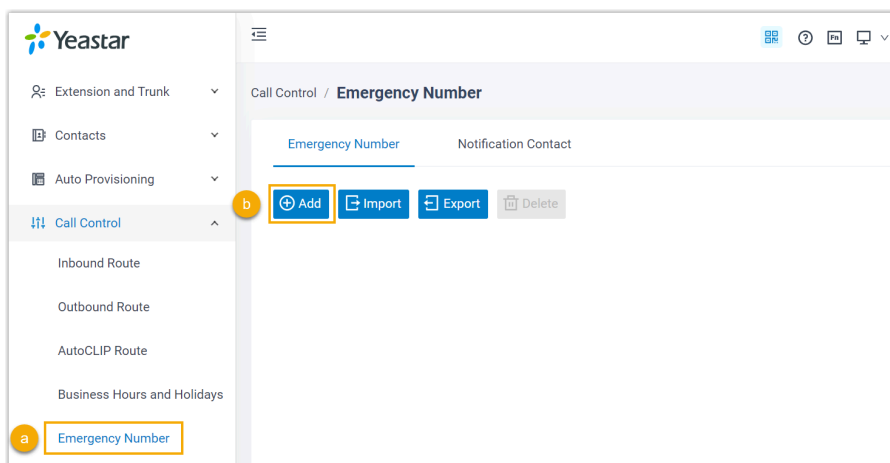
1. View the existing settings on 3CX Management Console.



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

b. In the **Emergency Numbers** section, click an emergency number to view its details.

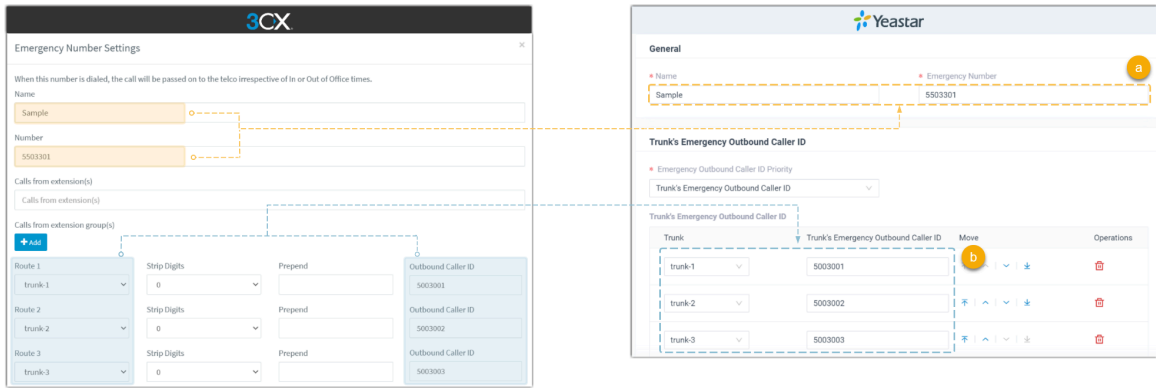
2. Create a new emergency number rule on Yeastar Management Portal.



a. Go to **Call Control > Emergency Number**.

b. In the **Emergency Number** tab, click **Add**.

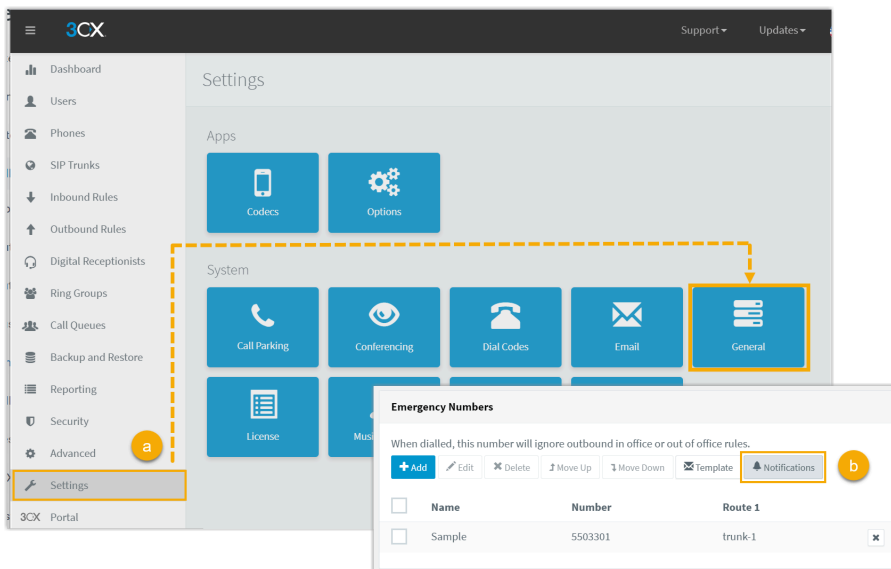
3. On Yeastar Management Portal, replicate the settings from 3CX.



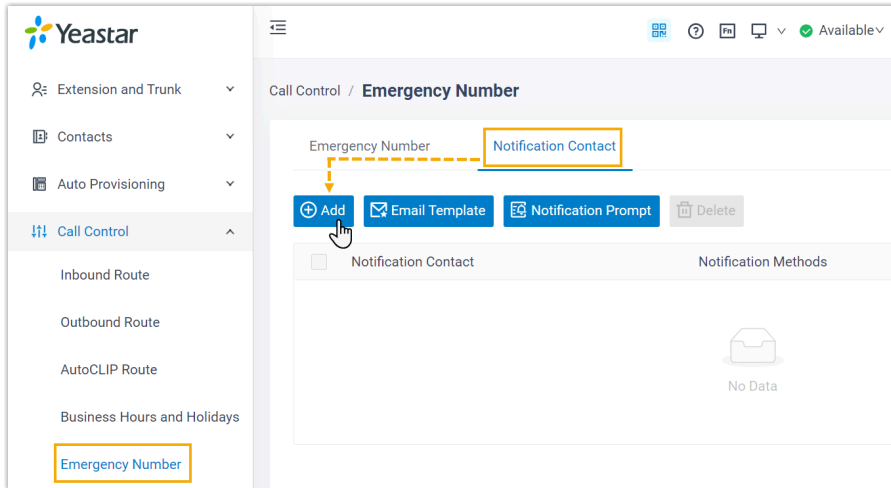
- a. Copy name and emergency number.
 - b. Select the corresponding trunk and copy the outbound caller ID accordingly.
 - c. Click **Save** and **Apply**.
4. If there are other emergency numbers in 3CX, repeat step 2~3.

Step 2. Replicate settings for emergency notification contact

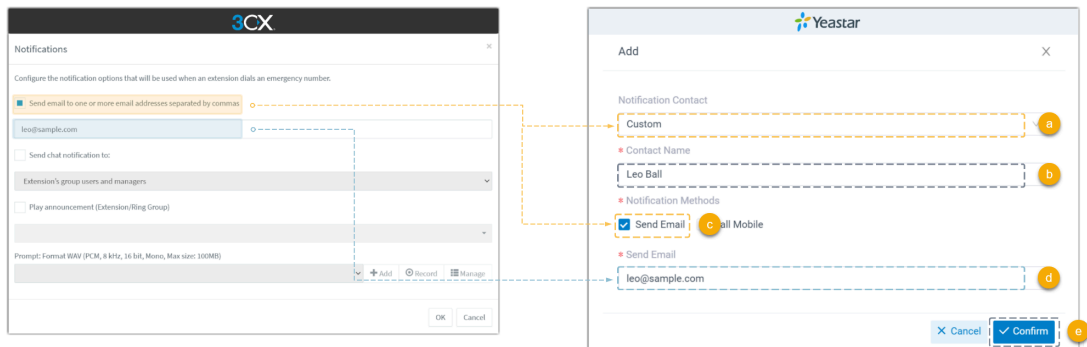
1. View the existing settings on 3CX Management Console.



- 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.



- 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:

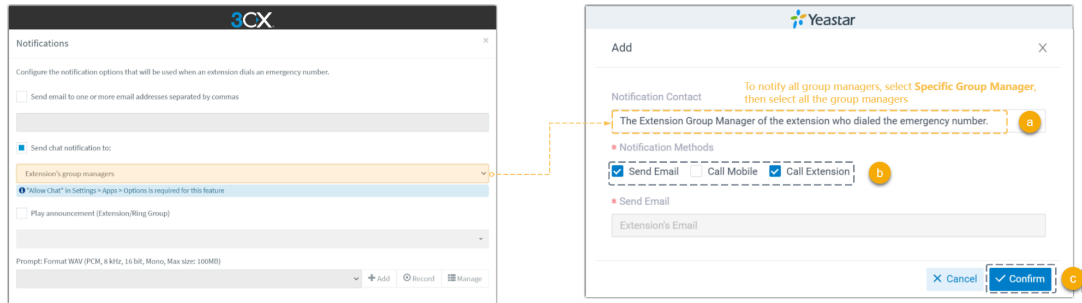


- a. In the **Notification Contact** drop-down list, select **Custom**.
 - b. In the **Contact Name** field, enter the contact name.
 - c. In the **Notification Methods** section, select **Send Email**.
 - d. In the **Send Email** field, copy the email address from 3CX.
 - e. Click **Confirm**.
 - f.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



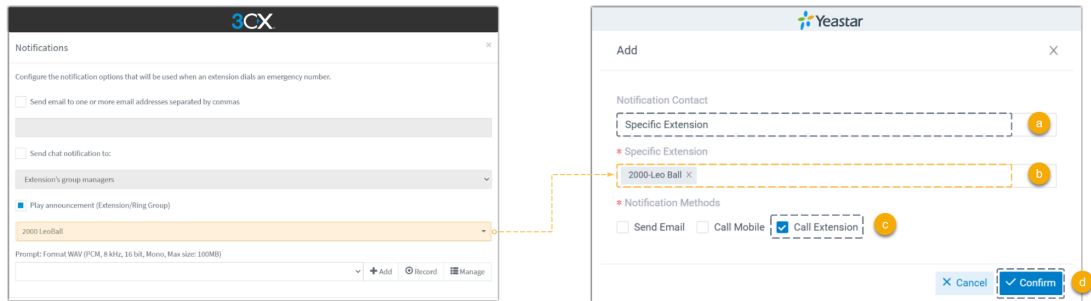
Note:

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:



- 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

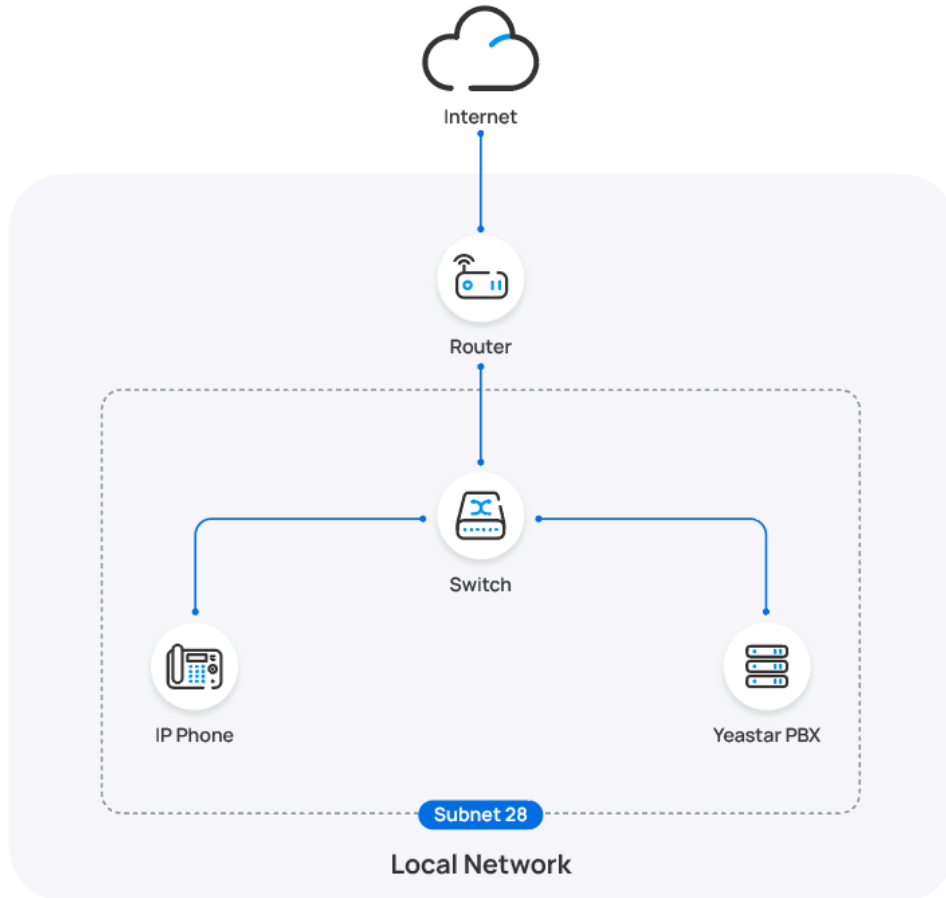
Determine Network Scenario

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:

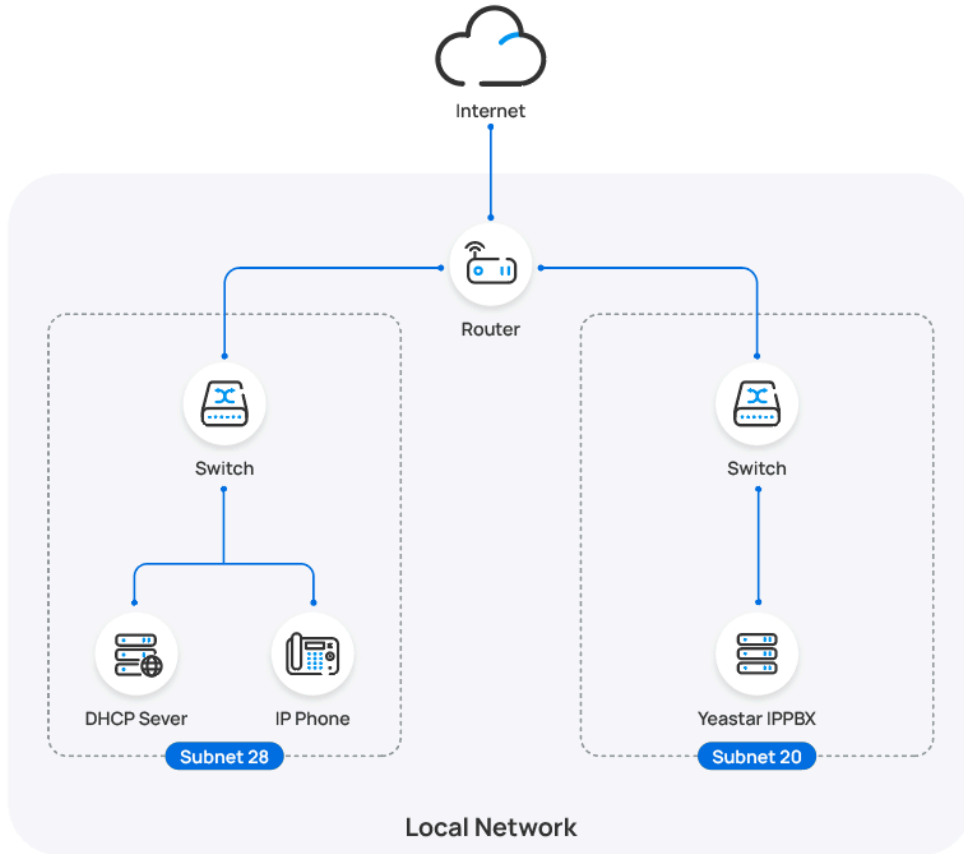
In the SAME subnet



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](#).

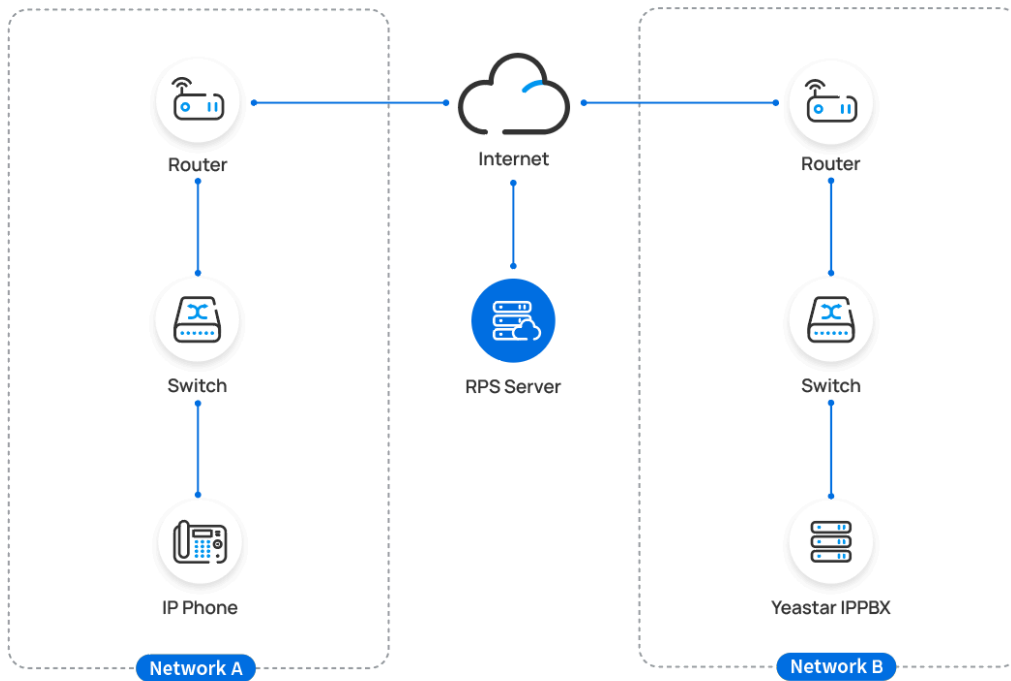
In DIFFERENT subnets



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



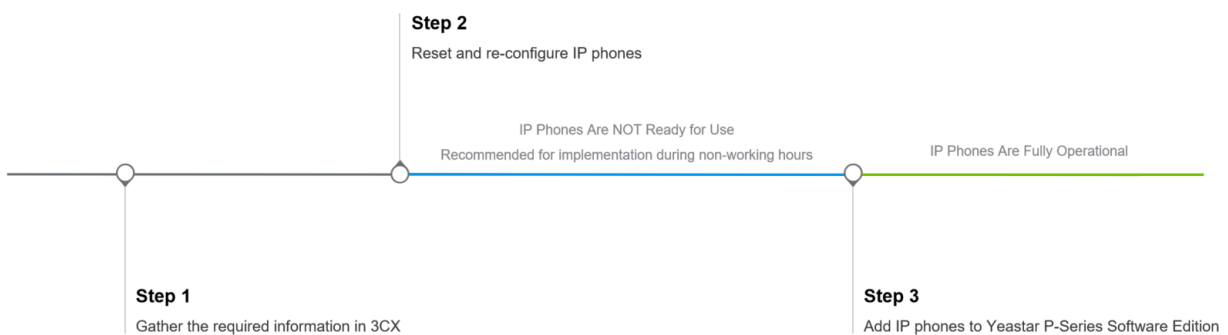
In this scenario, **Yeastar P-Series Software Edition** is typically installed on a cloud-based server, such as AWS, Vultr, Microsoft Azure.

To migrate IP phones in this scenario, see [Migrate IP Phones in Remote Network](#).

Migrate IP Phones in the Same Subnet

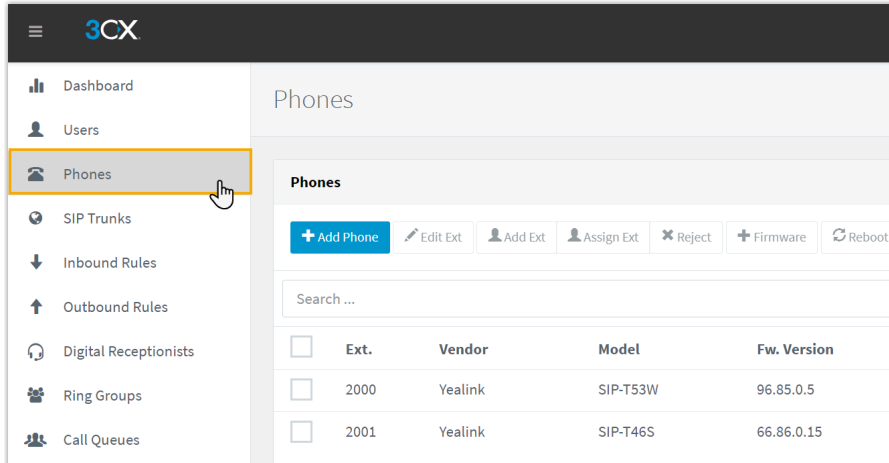
This topic describes how to migrate IP phones that are on the same subnet with Yeastar PBX, from 3CX to Yeastar P-Series Software Edition.

Procedure

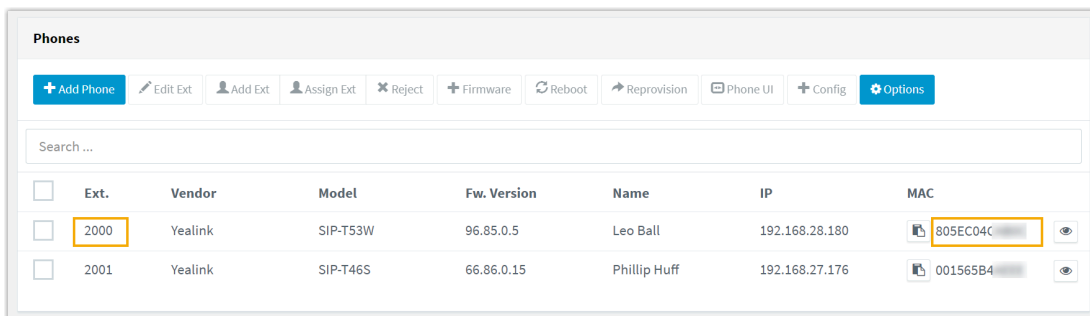


Step 1. Gather the required information in 3CX

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



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



- **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  beside the IP phone.

<input type="checkbox"/>	Status	Extension	Name	Vendor	Model	IP Address	Phone Passw	Operations
<input type="checkbox"/>		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 

4. Click **Save**.






Result

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



Note:

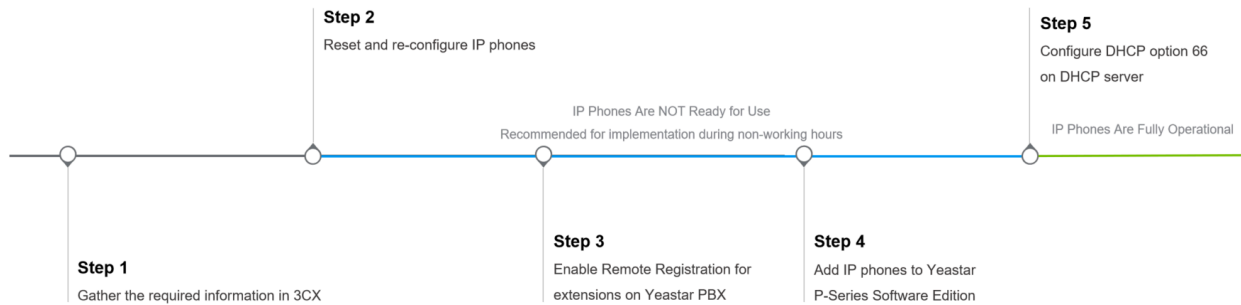
If your IP phones did not reboot automatically, you need to manually reboot the phone to make the configurations take effect.

<input type="checkbox"/>	Status	Extension	Name	Vendor	Model	IP Address	Phone Passw	Operations
<input type="checkbox"/>		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

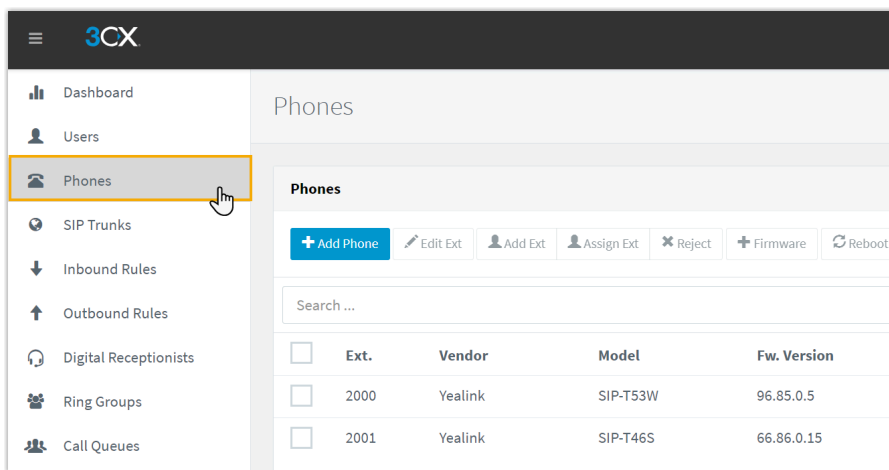


Prerequisites

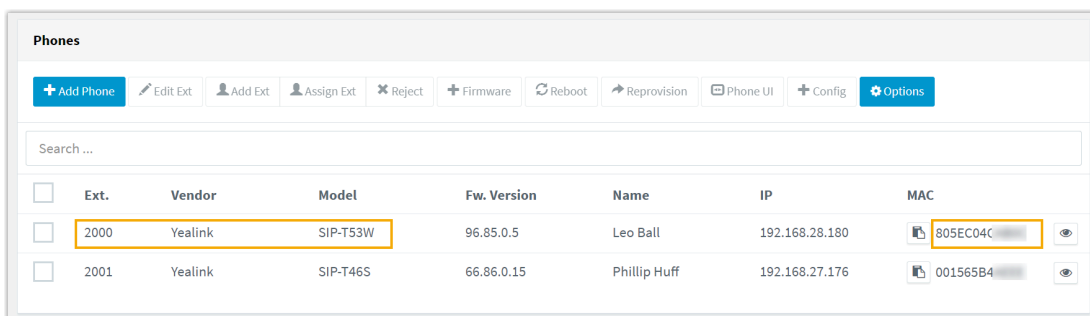
Make sure that there is only one DHCP server running in the subnet where the IP phone is deployed, or the IP phone would fail to obtain an IP address.

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.



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



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

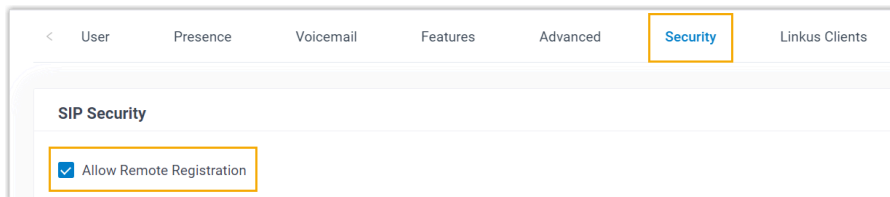
Step 2. Reset and re-configure IP phones

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

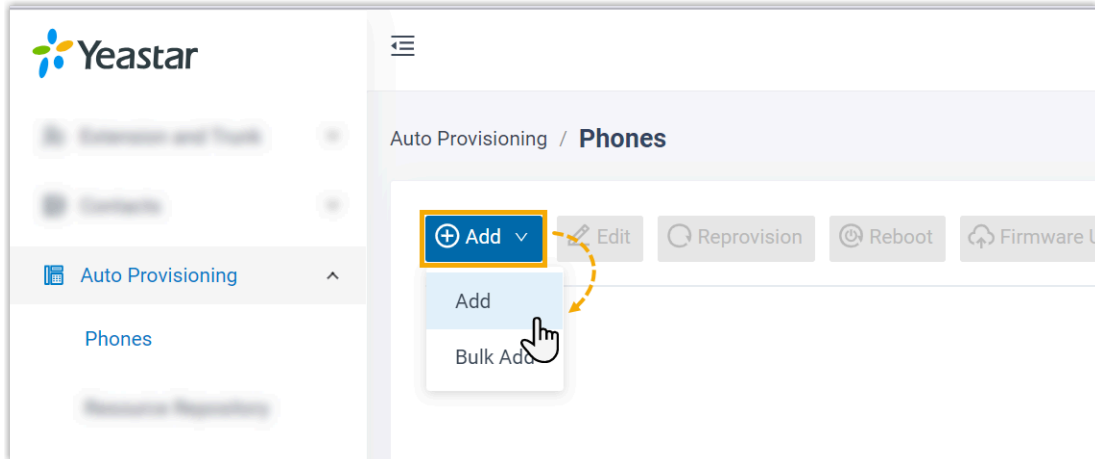
1. Log in to PBX Management Portal, go to **Extension and Trunk > Extension**, edit the desired extension.
2. Click **Security** tab, select the checkbox of **Allow Remote Registration** in the **SIP Security** section.



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**.



3. In the **IP Phone** section, enter the following phone information according to the [gathered information](#).

IP Phone

<p>* Vendor</p> <input style="width: 90%;" type="text" value="Yealink"/>	<p>* Model</p> <input style="width: 90%;" type="text" value="SIP-T53W"/>
<p>* MAC Address</p> <input style="width: 100%;" type="text"/>	

- **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

<p>* Template</p> <input style="width: 90%;" type="text" value="YSDP_YealinkT5"/>	<p>* Provisioning Method</p> <input style="width: 90%;" type="text" value="DHCP (In the Office)"/>
<p>Provisioning Link</p> <input style="width: 100%;" type="text" value="http://192.168.20.58:7778/api/autoprovision/KZVJ3gWtHjecazEQB"/>	

- **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.

Assign Extension

* Select Extension

2000-Leo Ball

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.

Options

* Template

YSDP_YealinkT5

* Provisioning Method

DHCP (In the Office)

Provisioning Link

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 Settings Firewall Settings **DHCP Server**

General Setup **Advanced Settings** IPv6 Settings IPv6 RA Settings

Dynamic DHCP
 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.

IIPv4-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/KZVJ3gwHjecazEQB

Define 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 , indicating the IP phone is successfully added to Yeastar P-Series Software Edition and assigned to the corresponding user.



Note:

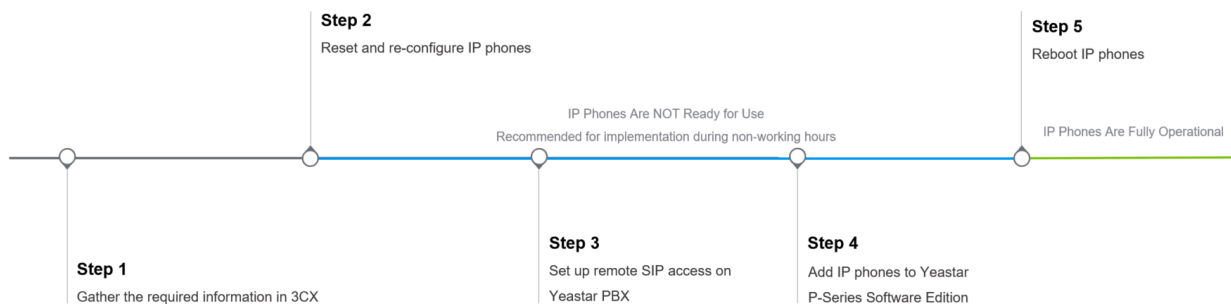
If your IP phones did not reboot automatically, you need to manually reboot the phone to make the configurations take effect.

<input type="checkbox"/>	Status	Extension	Name	Vendor	Model	IP Address	Phone Passw	Operations
<input type="checkbox"/>		2000	Leo Ball	Yealink	SIP-T53W	192.168.28.192	-	   

Migrate IP Phones in Remote Network

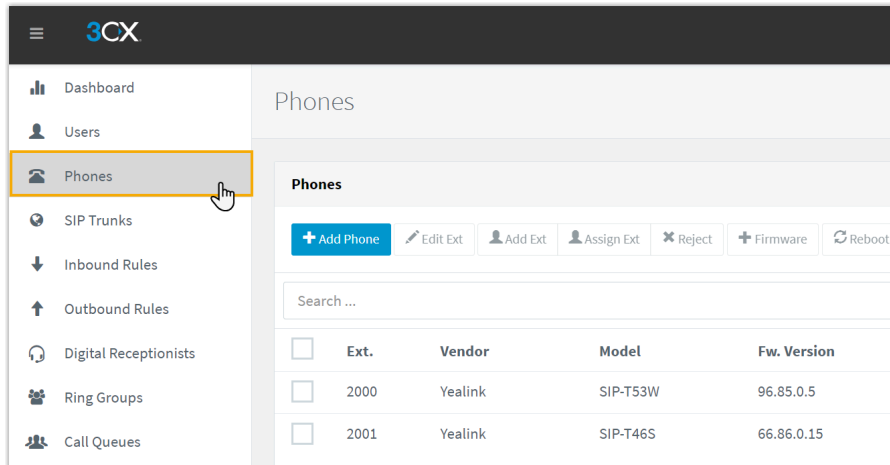
This topic describes how to migrate IP phones that are in different network with Yeastar PBX, from 3CX to Yeastar P-Series Software Edition.

Procedure

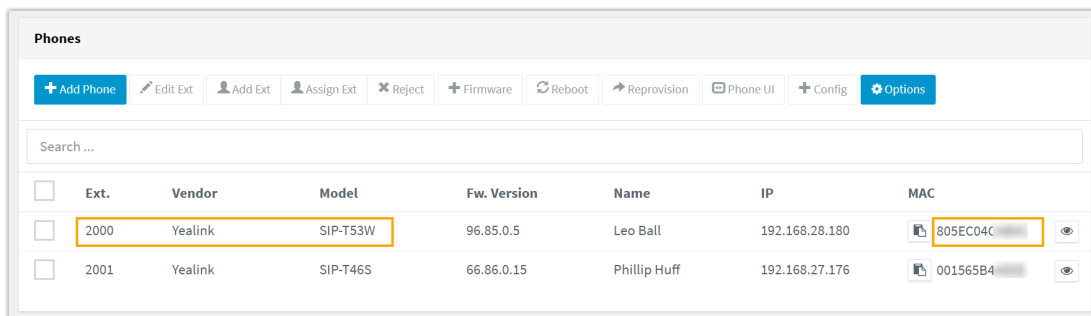


Step 1. Gather the required information in 3CX

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



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



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

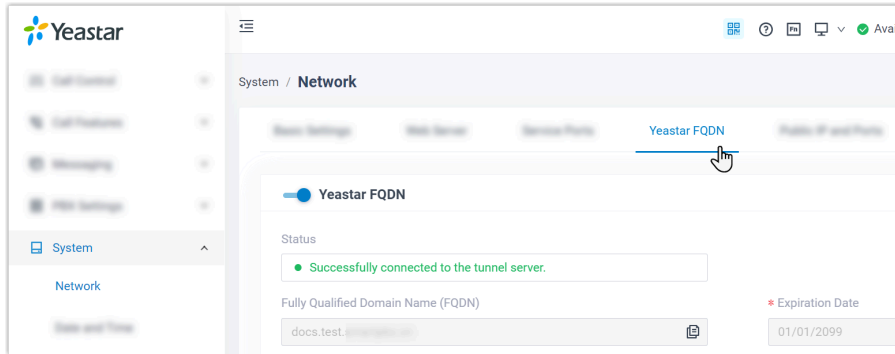
Step 2. Reset and re-configure IP phones

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.

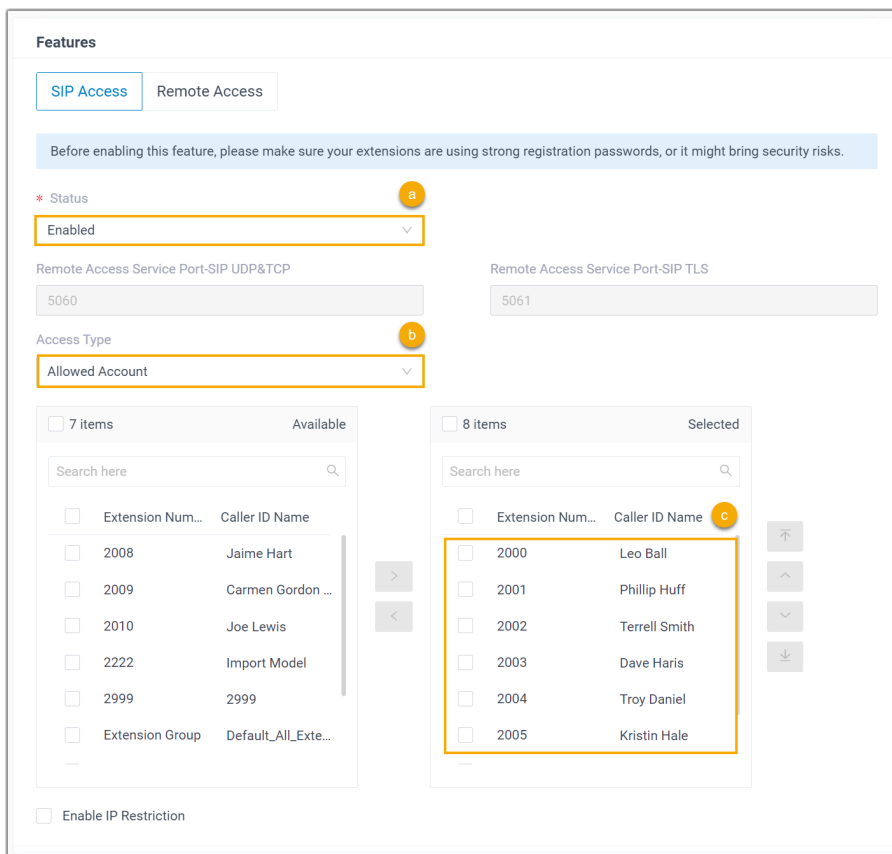
1. Reset all the IP phones that need to be migrated.
For instructions on resetting the IP phone, refer to the phone's user manual or contact the phone's manufacturer for assistance.
2. Re-configure network settings for IP phones to ensure they can connect to internet.

Step 3. Set up remote SIP access on Yeastar PBX

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



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

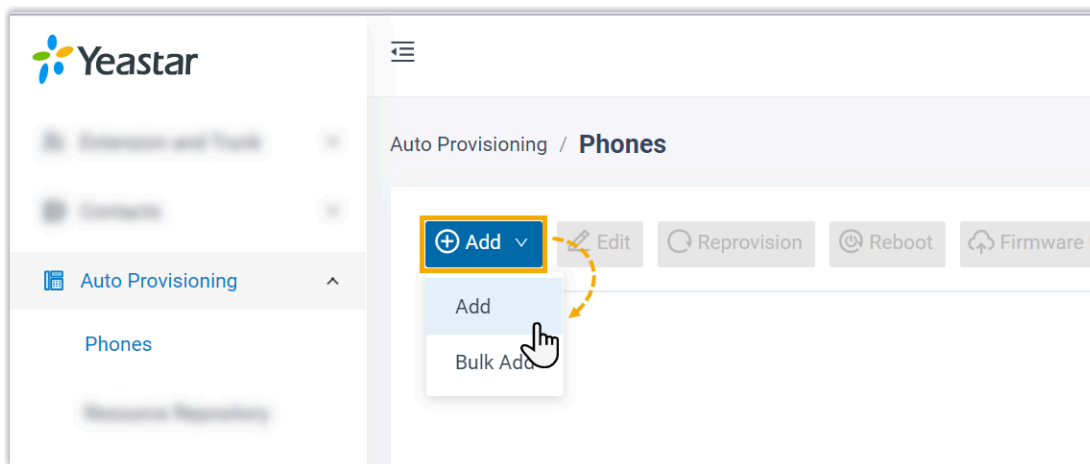


- a. In the **Status** drop-down list, select **Enabled**.
- b. In the **Access Type** drop-down list, select the account access restriction type.

- **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**.



3. In the **IP Phone** section, enter the following phone information according to the [gathered information](#).

IP Phone

<p>* Vendor</p> <input style="width: 90%;" type="text" value="Yealink"/>	<p>* Model</p> <input style="width: 90%;" type="text" value="SIP-T53W"/>
<p>* MAC Address</p> <input style="width: 90%;" type="text" value=""/>	


- **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.





- 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 **Provisioning Link** field.
 - c. Unselect the **Authentication for the First-time Auto Provisioning** checkbox.
5. In the **Assign Extension** section, select the corresponding extension.

- 6. Click **Save**.

Step 5. Reboot the IP phone

Have your clients reboot the IP phones.

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

<input type="checkbox"/>	Status	Extension	Name	Vendor	Model	IP Address	Phone Passw	Operations
<input type="checkbox"/>		2000	Leo Ball	Yealink	SIP-T53W	192.168.28.192	-	  

Migrate IP Phones to Yeastar P-Series Cloud Edition

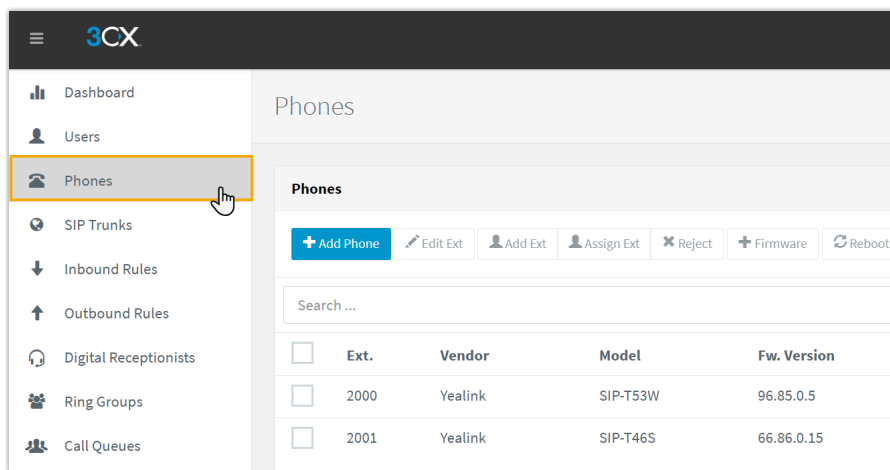
This topic describes how to migrate IP phones from 3CX to Yeastar P-Series Cloud Edition.

Procedure

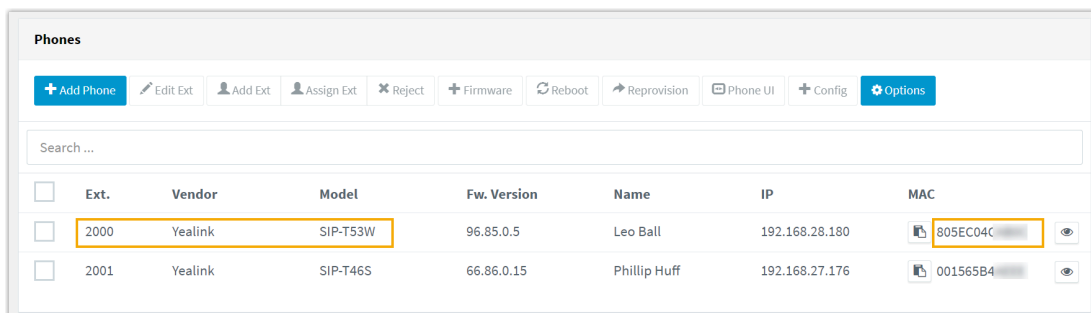


Step 1. Gather the required information in 3CX

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



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



- **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.

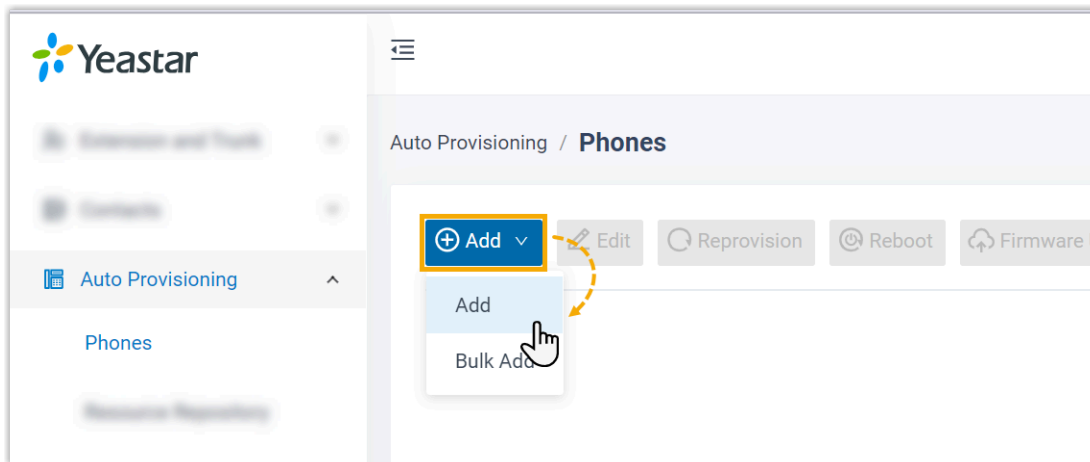
1. Reset all the IP phones that need to be migrated.

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**.



3. In the **IP Phone** section, enter the following phone information according to the [gathered information](#).

IP Phone

* Vendor * Model

Yealink SIP-T53W

* 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:

Options

* Template: YSDP_YealinkT5 a

Provisioning Link: <https://docs-autop.sgycm.yeastarcloud.com:443/api/autoprovision/gro>

Authentication for the First-time Auto Provisioning b

Hot Desking Phone

- 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: 2000-Leo Ball

6. Click **Save**.

Step 4. Reboot the IP phone

Have your clients reboot their IP phones.

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

<input type="checkbox"/>	Status	Extension	Name	Vendor	Model	IP Address	Phone Passw	Operations
<input type="checkbox"/>		2000	Leo Ball	Yealink	SIP-T53W	192.168.28.192	-	   

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	<ul style="list-style-type: none">◦ Administrator Guide: P-Series Software Edition Documentation◦ User Guide: P-Series Linkus Software Edition Documentation
P-Series Cloud Edition	<ul style="list-style-type: none">◦ 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](#).