



# Phone System Guide

Email [support@totalcx.com](mailto:support@totalcx.com) | Call 888 290 0038 | Visit [totalcx.com](https://totalcx.com)



## Welcome Email

- ▶ “Complete Setup” to create phone portal password and hot desk/voicemail PIN.
- ▶ Bookmark the phone portal: <https://interactive.tel>



## Placing a Call

- ▶ **EXTERNAL:** There is no need to dial 9 or 1 for outbound calls. Dial the number including the area code and press “Call”, “#”, or wait.
- ▶ **INTERNAL:** Dial the extension and press “Call”, “#”, or wait. You may also search the directory and press “Call”.



## Transferring Calls

### Blind Transfer

- With the caller on the line, press “Transfer”. ▶ Dial the number or extension you wish to transfer to. ▶ Press “B Transfer”.

### Warm (Attended) Transfer

- ▶ With the caller on the line, press “Transfer”.
- ▶ Dial the number or extension you wish to transfer to.
- ▶ Wait for the transfer party to answer
- ▶ After announcing the transfer, you may hang up or press “Transfer” to complete the transfer operation.
  - ▶ You may also press the conference key to bring all 3 parties together and then hang up to complete the transfer.

### Transfer directly to voicemail

- With the caller on the line, press “Transfer” ▶ Enter \*8 and the extension you wish to transfer to ▶ Press “B Transfer”.



## Hold

- ▶ With the caller on the line, press “hold”. This will place the caller on hold on your line only (no agent can retrieve this hold) Press resume to continue your call



## Park

- › With the caller on the line press any of the available (green) park keys on the phone, e.g. Park 720.
- › The caller will leave your line and enter the parking spot you chose; the key will turn red.
- › You may then announce that a caller is waiting on park.
- › To retrieve a call on park, press the flashing red park key.
- › If the parked caller does not get answered in 45 seconds it will return to the agent who parked the call.



## Voicemail

To create a greeting:  

- Press the voicemail key or dial 5001. ➤ Enter your password and press "#". ➤ Press 6 to enter greetings menu. ➤ Press 1 to record a new greeting. ➤ Press 1 to create a new greeting in bin 1. ➤ Listen to the prompts.



### Sample Greeting

Hello, this is \_\_\_\_\_. I'm not available to take your call, but if you would leave your name, number, and a brief message, I will return your call as soon as possible.



## To retrieve your messages:

- Press the voicemail key or dial 5001. ➤ Enter your password and press "#". ➤ Press 1 for new messages or 2 for old messages. ➤ Listen to the prompts.

*\*You may also view or listen to your voicemail messages via the phone web portal\**



## To send a message to a specific mailbox:

- › Dial voicemail at 5001
- › Press 3 for the send message menu.
- › Listen to the prompts.



## To retrieve your messages from outside of the office:

- › Dial your own direct number.
- › When you hear your voicemail greeting press "\*"
- › Enter your passcode and press "#"
- › Listen to the prompts.