Web Portal Quick Reference Guide

Getting Started

Welcome to your new TotalCX™ account! Your account on this system will allow you to make calls, receive voicemails, chat with other users in the organization and much more. This document is designed to help teach you how to navigate to the Manager Portal, a web interface that allows you to access and control your account.

1. Accessing the Manager Portal

Login Name

2010@interactivetel

Password

••••••••

Log In

Forgot Login Name | Forgot Password

To access the manager portal:

1. Start a web browser.
2. Go to **https://interactive.tel/portal/**
3. At the login page:

   • Enter Login Name. Login name will be your *extension number@PBXdomainname*.

   • Enter Password. This is the same password you created when you received the TotalCX™ "Welcome!" email and selected the "Complete Setup" button. If you did not receive a welcome email, contact your PBX administrator.

1.1 Home

The Home page of your portal provides an at-a-glance view of everything going on with your extension.

Field	Description
New Messages	Shows new messages. You can play messages, click Call to Play, forward, download, save, and delete. To see all options, hover over the voicemail management buttons.
Recent Call History	**Color-coded icons show your recent calls.** ✅ | **Green icon** = outbound call. ❌ | **Red icon** = missed inbound calls. ☎ | **Blue icon** = inbound received calls. To call back a number, click the phone number.
Active Answering Rule	Your extension can have multiple answering rules. For example, you might ring your phone in one mode or forward to your cell in another mode. In this field, you can choose which answering rule is the active rule.
Active Phones	Your extension may have multiple phones (for example, one in the office and one on cell). This field shows which handsets are currently online.

1.2 Messages

You can configure your voicemail using the Messages page.
This page has three tabs for handling Messages:

Voicemail   Chat and SMS   Settings

To display the Messages page, click the Messages icon:

Messages

Voicemail

The Voicemail tab allows you to manage your New, Saved, and Trash voice messages.

Messages				
Voicemail 5	Chat and SMS	Settings		

| New ▼ | | | | |

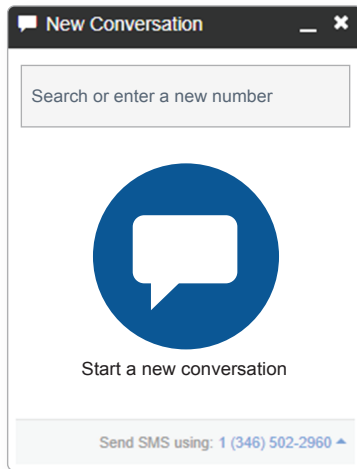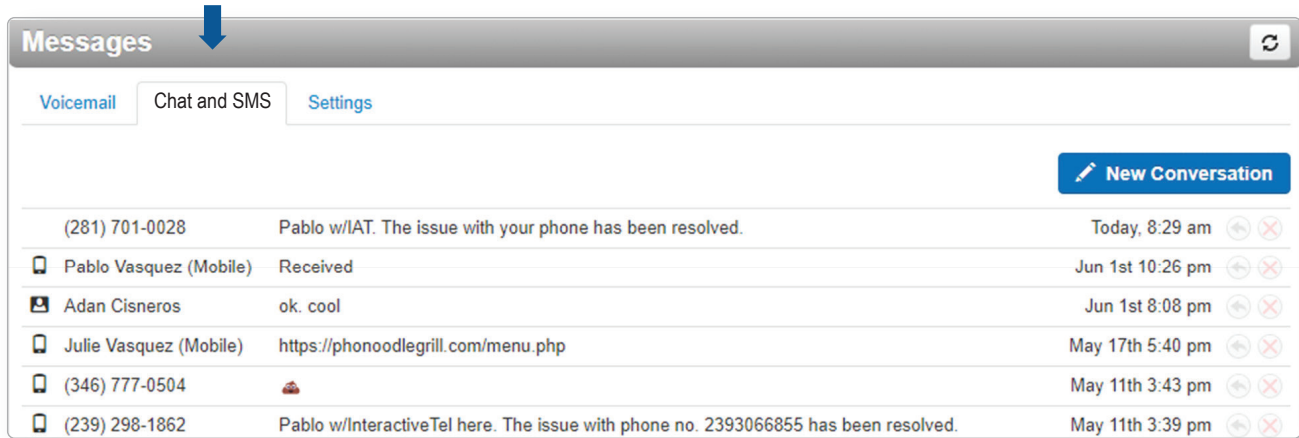|	From	Date	Duration	
▶ 6999	Parkway	Today, 6:25 pm	0:18	
▶ (713) 933-5876		Today, 6:23 pm	0:38	
▶ (346) 954-8400	Honda of Tomball	Today, 6:15 pm	0:19	
▶ 2008	Adan Cisneros	Apr 5th 11:10 am	0:04	
▶ (832) 420-1333		Apr 3rd 1:48 pm	0:08	

To the right of the message and message info you will see the voicemail management options:

The phone icon allows you to use the Call to Play options where the system will call your extension and play the voicemail.

The arrow pointing to the right allows you to forward the voicemail to another extension.

The arrow pointing down allows you to download the voicemail to your computer.

The disk icon as allows you to save the voicemail in your account's Saved section and will appear when selecting the Saved option from the voicemail box options.

The red X is the delete option. Clicking the icon will place voice message in your Trash section. Once message is in Trash you only have same day to recover message as trash is emptied daily.

Chat and SMS

On the Chat and SMS tab you can see all your Chat conversations.

Messages			⟳
Voicemail	**Chat and SMS**	Settings	
			✏ New Conversation
(281) 701-0028	Pablo w/IAT. The issue with your phone has been resolved.		Today, 8:29 am ↩ ✕
📱 Pablo Vasquez (Mobile)	Received		Jun 1st 10:26 pm ↩ ✕
👤 Adan Cisneros	ok. cool		Jun 1st 8:08 pm ↩ ✕
📱 Julie Vasquez (Mobile)	https://phonoodlegrill.com/menu.php		May 17th 5:40 pm ↩ ✕
📱 (346) 777-0504	💩		May 11th 3:43 pm ↩ ✕
📱 (239) 298-1862	Pablo w/InteractiveTel here. The issue with phone no. 2393066855 has been resolved.		May 11th 3:39 pm ↩ ✕

New Conversation — ✕

Search or enter a new number

Start a new conversation

Send SMS using: 1 (346) 502-2960 ▲

New Conversation

To start a new conversation, click the New Conversation button and a new chat window will appear. Start typing the users name or scroll down to see a list of everyone in the organization you can select from. After selecting contact you can select Start to start chatting. Or on in your Contacts widget click the chat box icon next to their name to start chat. If applicable you can also send SMS messages (texting). To send a SMS message enter the phone number in the New Conversation search bar and select Start to begin texting. Note, to send an SMS message your direct line must be SMS enable.
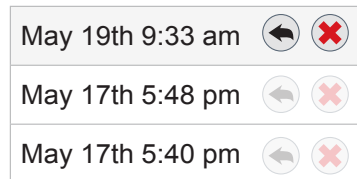
If you would like to reply to a message, simply type in the chat window that displays when receiving a message. You can also click the reply icon to the right of the message in the message center.

May 19th 9:33 am	↩ ✕
May 17th 5:48 pm	↩ ✕
May 17th 5:40 pm	↩ ✕

❌ To delete a message, click the red x that appears next to the reply button.

Settings

Clicking the Settings tab displays options for controlling your voicemail inbox, greetings and voicemail to email.

Inbox Options:

These options allow you to control your experience when calling into your voicemail box and checking your messages over the phone.

- Clicking the box next to Sort voicemail inbox by latest first will configure your voicemail to play the most recent voicemail message left as the first message you hear. If this option is not enabled the voicemails will be played in the order they were received.

- Clicking the box next to Announce voicemail received time configure your voicemail account to tell you the time the voicemail was left when checking messages.

- Clicking the box next to Announce incoming Call ID will have your voicemail read the caller ID number to you.

Unified Messaging:

The Email Notification options allows you to select the format of email notifications that you receive.

Greetings

To add a greeting to your mailbox:

1. From the Settings tab of the Messages page, locate Greetings and click the speaker icon.

2. In the Manage Greetings window select Add Greeting.

3. Select one of the three options for New Greeting...

Text-To-Speech: Generate an audio greeting with text to speech engine.

Upload: Browse to a WAV or MP3 file on your PC and upload.

Record: When selected, apply a greeting name and enter your extension number then select Call. The PBX will immediately call you and prompt you to record your greeting.

1.3 Contacts

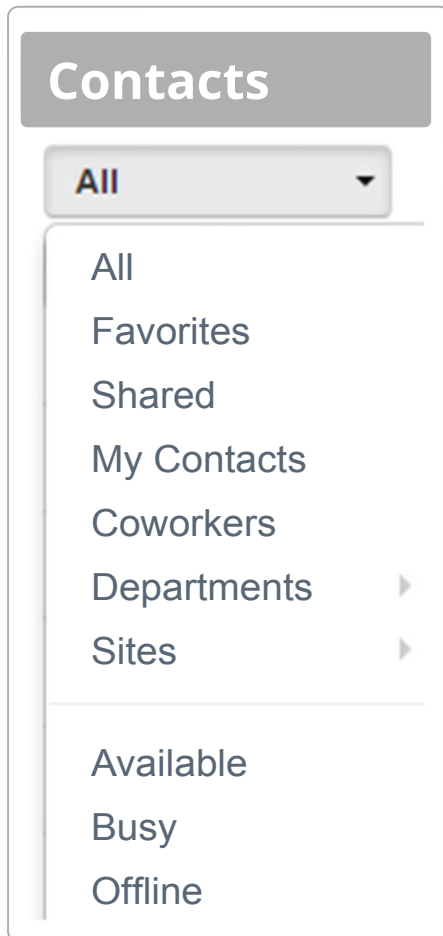The Contacts center is where all users on the PBX are listed.

Add Contact

The Add Contact button in the righthand corner of the Contacts web page will open the new contact window and allow you to enter a new contact that will be displayed in your My Contacts drop down.

Add Contact

Contact Group

On the Contacts page, you will see a drop down that will let you filter for different groups:

Contacts

All

- All
- Favorites
- Shared
- My Contacts
- Coworkers
- Departments ▸
- Sites ▸

- Available
- Busy
- Offline

All
Displays all users on the system.

Favorites
Displays contacts you selected as favorites. Which you can add to by clicking the star next to the contact's name.

Shared
Shared contacts are contacts available to the entire organization added by Office Managers.

My Contacts
Contacts you have manually added by clicking the Add Contact button in the top right.

Coworkers
Displays all contacts in organization with List in Directory enabled.

Departments
Which break users down by the Department entered on their user profile.

Sites
Break users down by the Sites entered on their profile.

Available
Displays contacts that are available to be called or chat via the portal.

Busy
Are users currently on the phone or has their status set to Do Not Disturb.

Offline
Users who do not have a registered device and not logged into the portal available to chat.

1.4 Answering Rules

The Answering Rules icon will take you to your answering rules center. Answering Rules are how you control what devices ring, how long those devices ring for when receiving a call. It is also where you can configure what to do with a call that goes unanswered. Every account is configured with a Default rule that cannot be deleted. If you have multiple answering rules configured the answering rule that is currently infect will say Active next to the rule.

When you click on Answering Rules you will see the option to set the *Ring for seconds* as seen in figure above. This is what controls how long a call attempts to ring you for. In this example it is set to ring for 25 seconds before going to voicemail. To set the ring time out click the dropdown to select how many seconds you would like calls to ring before sending the call to voicemail or the specified destination entered into the When unanswered field in the active answering rule. If you do not want a ring time out, meaning you want your phone to ring forever, select Unlimited at the bottom of the drop-down.
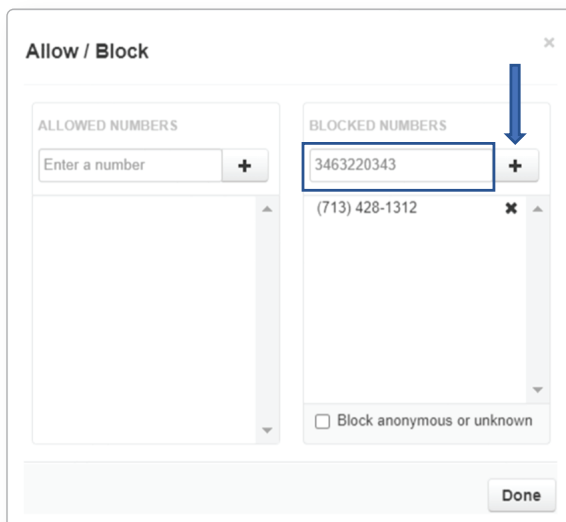
Allow / Block

To the right of the answering rules center you will see the Allow/Block button. This allows you to enter certain phone numbers to allow or prevent them reaching you. Clicking the Allow / Block button will open the Allow / Block window.

BLOCKED NUMBERS allows you to add phone numbers you do not want to be able to reach you. To add a phone number to Block, simply enter the number into the respective field and click the plus sign to add the phone number.

You can block all anonymous or unknown callers simply by clicking the check box next to *Block anonymous or unknown.*

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Add Rule

The Add Rule button allows you to configure a new Answering Rules for your account. Clicking the Add Rule button will display the Add an Answering Rule window.

Add Rule

Add an Answering Rule   ×

Time Frame   Select a time frame ⌄   This is when your answering rule will apply
              ☑ Enabled

              ☐ Do not disturb
              ☐ Call screening

Call Forwarding ☐ Always   Extension, number or phone
                 ☐ When busy   Extension, number or phone
                 ☐ When unanswered Extension, number or phone
                 ☐ When offline   Extension, number or phone

                 ☐ Simultaneous ring ☑ Include user's extension
                                      ☐ Ring all user's phones
                                      ☐ Answer confirmation for offnet numbers
                                      Extension, number or phone ◷ 0 ⊕

              ☑ Just ring user's extension

                                      Cancel   **Save**

Time Frames are a set period of time which covers when we want certain events to occur such as our phone to ring. When configuring a new answering rule, you must first choose when the rule will be in affect by selecting a Time Frame.

The **Enable** options lets you easily enable and disable the rule from being in affect. A check in the box means the rules is enabled and will be in affect during the selected time frame.

The **Do not Disturb** option will prevent calls from reaching your devices and send the call to voicemail if voicemail is enabled or disconnect the call if voicemail is not enabled.

When **Call screening** is enabled, callers record their name. After they record their name, then your devices will ring. If you answer the call, it will play the users name and allow to press 1 to be connected or hang up the call and have them be sent to voicemail or wherever your Call Forwarding options are configured to send unanswered calls.

The **Call Forwarding** options will route calls based of the options selected. When entering a destination, it can be anything you would like, another user or another telephone number that does not have to be associated with your account or even on the system.

The **Simultaneous Ring** options allows you to configure what devices ring when receiving a call. Clicking the **Simultaneous Ring** box will allow you to ring more than just your extension and allow you to ring other extensions or phone numbers as well.

1.5 Time Frames

The Time Frames icon will take you to the Time Frames application center. Time Frames are a set period of time which covers when we want certain events to occur, such as our phone to ring.
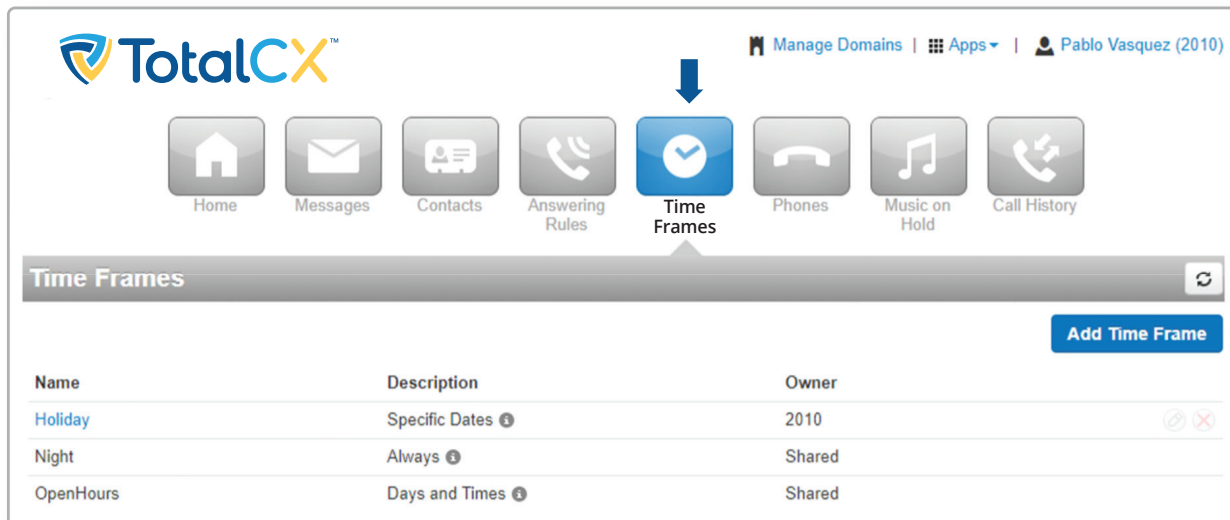
To view and create your available Time Frames click on the Time Frame icon in the top navigation menu bar. Here you will see all the time frames available for you. Time frames with names in black and without the option to edit or delete are time frames created at the domain level that are available to everyone in the domain to use. You can only edit the time frames with blue name that you created.

Add Time Frame

To create a time frame, click on the Add Time Frame button. After clicking Add Time Frame. button the *Add Timeframe* window will appear.

The Name field allows you to give the Time Frame a name that will help identify the time frame. The name cannot be changed once the rule has been created. Under the name field, you see three options for when the time frame should be in effect:

- **Always =** selecting this option makes the time frame always in effect 24/7.
- **Days of the week and times =** select this option to select days and times when the time frame will be applied.
- **Specific dates or ranges =** select this option to specify a specific date or range of dates. Typically used for Holiday's or PTO.

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1.6 Phones

The Phones icon will take you to your phones center where all registered devices to your account are listed.

A **green icon** next to the device means the device is registered and will be able to send and receive calls without issue.

A **red icon** means the device is unregistered. This could be caused because the device is currently turned off. Or the phone system is unable to communicate with the device.

The **Add Phone** button adds phones to your system. This task usually is performed by administrators and is not described in this guide.

TotalCX™ Mobile

The Phones page also has a *TotalCX Mobile* button that takes you to your smartphone's app store. TotalCX Mobile is a mobile app that turns your smartphone into an extension of your Cloud PBX. Make and receive calls as being in the office along with managing your voicemail, answering rules, and contacts.

Download TotalCX Mobile:
Scan the QR code to download the app or search for *TotalCX Mobile* in the app store.

Register TotalCX Mobile:
Enter your Username and Password. This will be the same credentials you use to access your Manager Portal.

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TotalCX

1.7 Music on Hold

Music on Hold allows you to specify personal music on hold for your extension. You configure music on hold files using the Music On Hold page. To display this page, click the Music on Hold icon at the top of the page.

Music on Hold
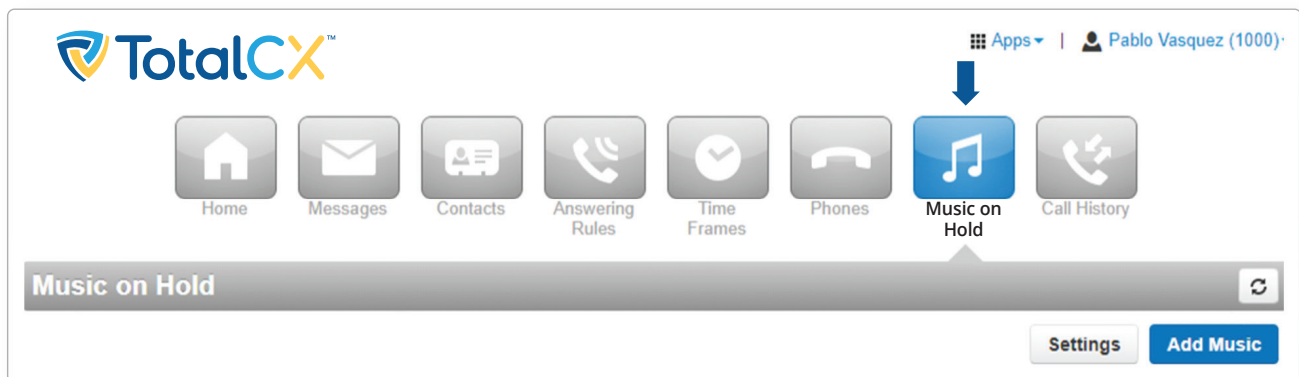
Add Music

The **Add Music** button allows you to add music on hold files. When you add music on hold files, the file name appears on the Music On Hold page, along with the duration and file size.

Settings

The **Settings** button allows you to play an introductory greeting.

NOTE: The music file must be in MP3 or WAV format, and must be properly licensed.

1.8 Call History

The Call History page shows a log of all your extensions calls.
It also provides tools to filter and export data.

Call History

The left side uses color-coded icons to represent call status:

= outbound calls   = inbound received calls   = missed calls

The Filters button allows you to filter the information displayed in the Call History page, so you can view only the information that interests you.

To filter by a specified date range, click the calendar icon in the *From* field then select a starting date. Do the same for the *To* field and select an ending date.

To filter by a *Caller Number*, enter the caller's number.

To filter by a *Dialed Number*, enter the dialed number.

To filter by type of call, select a *Call Type* drop down and choose from Inbound, Outbound or Missed.

When your filter(s) have been applied select the Filter button to display items that match your criteria.