



TOTALCLOUD[®]
PBX



TotalCloud PBX Getting Started Guide

Welcome to Birch TotalCloud PBX!

Before using your new TotalCloud PBX Service, be sure to setup your Voicemail Greeting. For more detailed user instructions, please refer to the Quick User Guide included with your handset. Additional instructions and quick reference guides are also available online in the Birch Help Center: www.birch.com/TotalCloud-PBX-Help-Center.

Set Up Your Voicemail Greeting & Passcode

Configuring your Voicemail greeting and passcode should be the first thing you do on the Phone System.

1. Press the message key on your phone
2. Enter your Initial VM Passcode (1000) then Press #
3. Follow the Voice Guided Prompts to record your name and greetings

Making Phone Calls from your TotalCloud PBX Phone

To place a call, enter the extension or phone number then press Send/Dial to initiate the call.



TIP: Getting an Outside Line

With TotalCloud PBX, you do not need to press 8 or 9 to get “an outside line”.

TotalCloud PBX Phones intelligently decide on extension call versus outside call based on the length of the number dialed.

If you have more than one Extension or Line on your phone, you can first select which Extension or Line to place the call from

Intelligent Feature Keys

You will see a few feature keys on the bottom of your phone. These will change depending on what you are doing it prioritizes the buttons on your phone based on need.

For example, Hold, Conference and Transfer do not appear on the Idle screen, but would appear on the “Active Call” screen.



TIP: Retrieving a Call On Hold

If you have a Shared Line or Main Line on your phone, pressing Resume may seem a little random if more than one call is holding. Always select the actual button of the holding call. [Calls placed on Hold on Shared Lines are publicly held.](#)

Transfer A Call

For more device-specific instructions, refer to the Quick User Guide for your TotalCloud PBX phone.

Announced Transfer

1. While on the call, press the Transfer / TRANS button
2. Enter the Extension or 10/11 Digit Phone Number Transfer Destination
 - The Caller is Placed on Hold automatically
 - A call is placed from you to the Transfer Destination
3. Upon answer, inform them who is on the line
4. Hang up or press Transfer to complete the Transfer

Blind Transfer (or Quick Transfer)

1. While on the call, press the Transfer / Trans button
2. On the next screen, press Blind
3. Enter the Extension or 10/11 Digit Phone Number and press Dial/Send
 - Call is transferred right away



TIP: Transferring to a Mobile Device

An announced transfer is recommended to some mobile phone providers. A blind transfer can sometimes go directly to mobile Voicemail.

BIRCH CONNECT & ADVANCED FEATURE ACTIVATION

You can manage your user account through www.BirchConnect.com

Access Birch Connect

1. Go to www.BirchConnect.com
2. Use your BirchConnect Username and Initial password
3. You will be asked to choose a new password

Access TotalCloud PBX Customer Portal

In BirchConnect click on “Services” > TotalCloud PBX

Set your TotalCloud PBX Hub Password

Only applicable for Professional and Executive Seats.

1. Access TotalCloud PBX Customer Portal
2. Select Number Settings > User Profile
3. In Seat Username and Password, select “Reset Password”; Make sure to follow password guidelines in page
4. Click Save

Access TotalCloud PBX Hub

Only applicable for Professional and Executive Seats. For more detailed information, access your Android, Windows or iOS user guides at www.birch.com/TCPBX-Hub-User-Guides.

1. Download TotalCloud PBX Hub at www.birch.com/TCPBX-Hub-Download
2. Once installed use your TotalCloud PBX Seat Username & Password to log in



An All-in-one Solution for Innovative Communication & Collaboration

The TotalCloud PBX Hub app meets all of your communication and collaboration (UCC) needs, from cloud-based VoIP and PBX to advanced services such as instant messaging and presence, video collaboration, desktop and file sharing, conferencing, mobility and more.

Find out more by visiting www.birch.com/TCPBX-Hub.



DOCUMENTATION

All TotalCloud PBX User Guides and other documentation can be accessed online through our Birch Help Center at: www.birch.com/TotalCloud-PBX-Help-Center.

Documents include: TotalCloud PBX Setup Guides, individual TotalCloud PBX Hub Setup Guides for Android, Windows and iOS, TotalCloud PBX phone and device guides, and other helpful tools to make the most of your new TotalCloud PBX system.