ESI eCloud

eConsole Office Manager User's Guide

An Office Manager has responsibility for organization-wide administration of the eCloud PBX. An Office Manager can view all information related to the domain that they belong to in the eCloud PBX.

This document is a supplement to the eCloud eConsole User's Guide 0455-0356, which is used by all users of the eCloud PBX. This document describes the features that are specific and only available to an Office Manager.

There are user-level videos many of the features discussed in this guide. Please refer to the ESI Resource Library's eConsole Manager videos.

Contents

Notice

Office Managers have access to call history, call recordings, and e911 address information associated with all users on the eCloud PBX. Office managers can also listen to any active calls. It's the office manager's and their company's responsibility to ensure applicable information is kept confidential and not misused.

Home

Home **🏠 Home** consists of a menu, active calls, call graph, users and applications, and usage statistics.
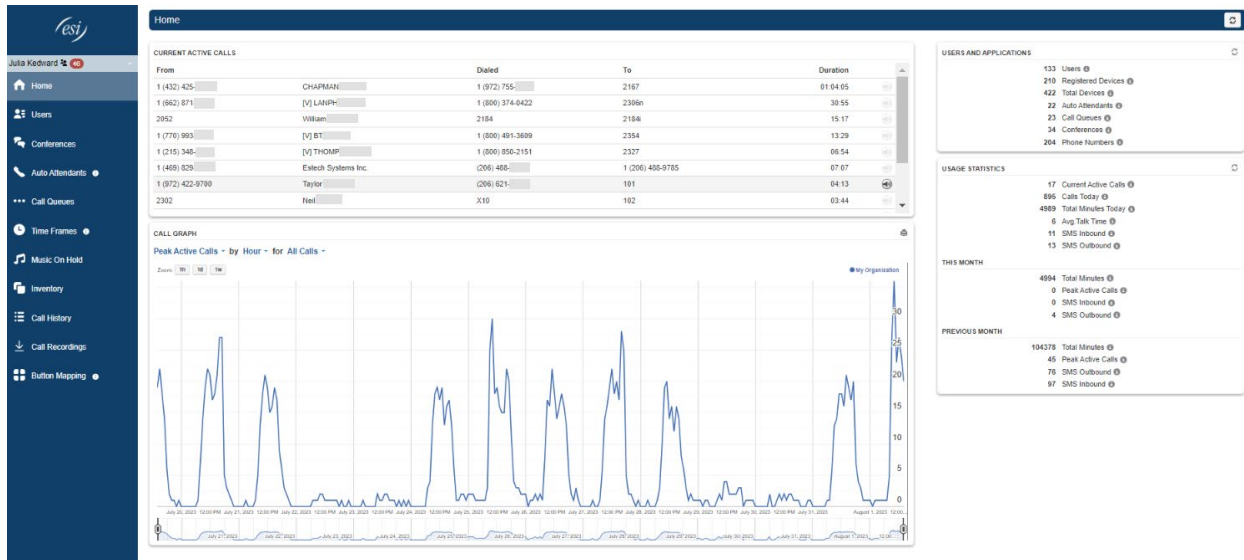
Current Active Calls

Current Active Calls shows all calls in progress. Click the speaker 🔊 on an active call to monitor the call.

A window will appear that will allow you to join call whisper to either party of the call.

Notice: Office Managers have access to call history, call recordings, and e911 address information associated with all users on the eCloud PBX. Office managers can also listen to any active calls. It's the office manager's and their company's responsibility to ensure applicable information is kept confidential and not misused.
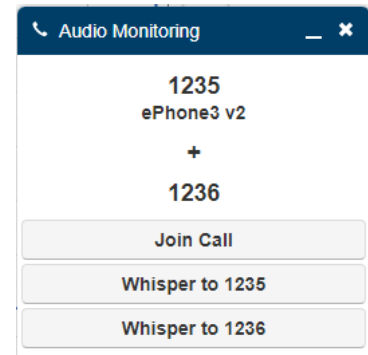
Call Graph

The Call Graph is a visual representation of call activity. The call graph can be sorted by:

- Peak Activity Calls
- Call Volume
- Total Minutes
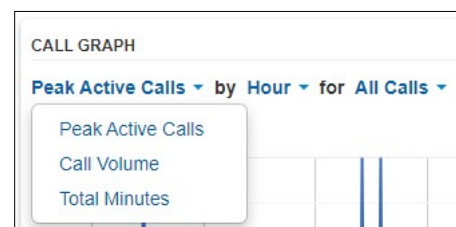
Users and Applications

Users and Applications shows how many users, devices, apps, etc, are configured on the domain.

Usage Statistics

Usage Statistics shows a numerical value of call and SMS activity for the current month and the previous month.

Menu

Clicking an item from the blue menu bar on the left of the screen will take you to the item's configuration centers. Example: Clicking the Users icon will take you to the user's center where you can create and manage users.
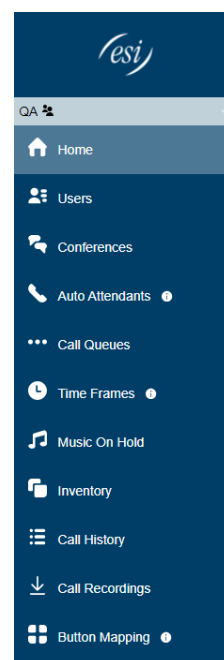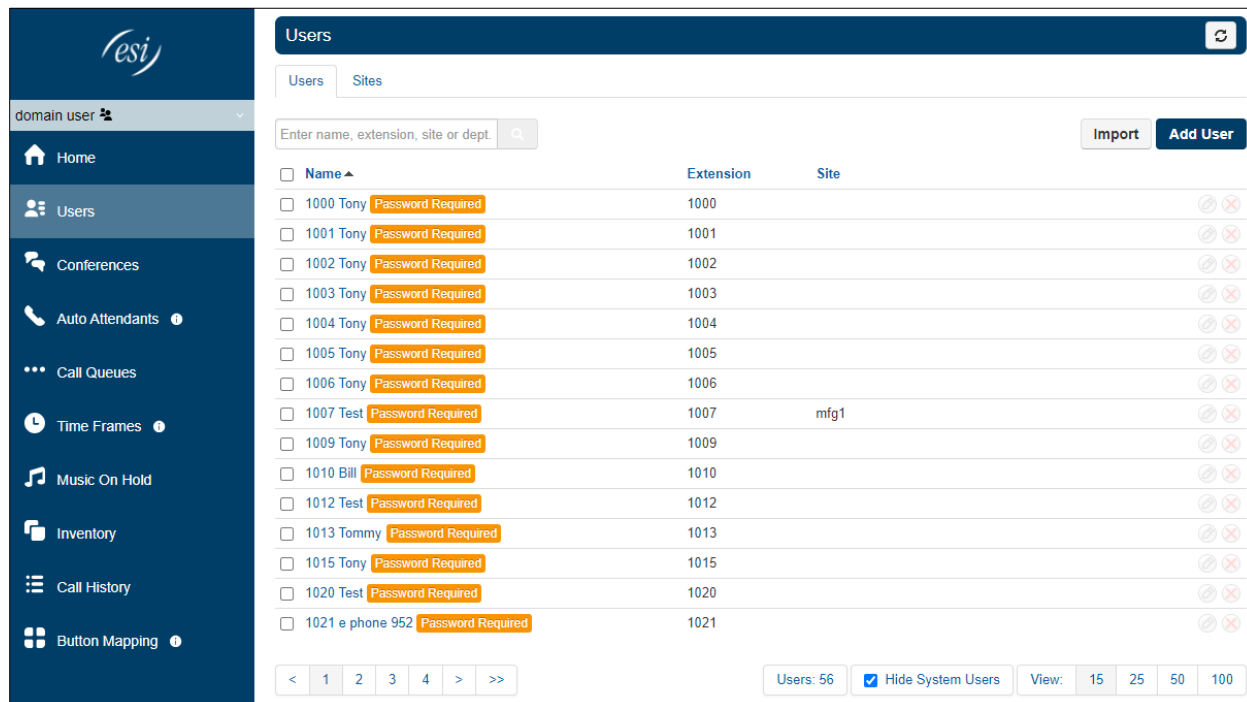
Users

The Users icon will take you to the user's center. This is where you can create and manage the users and sites on your domain.

Users

Users are destinations we want to send calls to. Every person's account, conference bridge, auto attendant, call queue in the organization is a user. This tab allows you to add, edit and delete users.

Import Users

The Import option will allow you bulk import users from a CSV file. To import a list of users
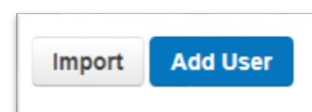
1. Login to eConsole as an Office Manager
2. Click on the Users tab in the menu
3. Click the Import button in the upper right of the screen.
4. In the pop-up that appears click Download Template. This will download a CSV file titled *user_import_esi.inhouse.com.csv* but you can rename it preferred.
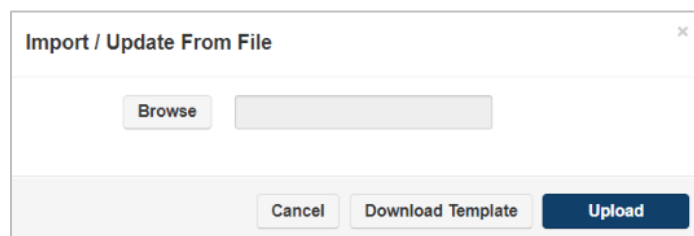
5. Open the CSV template, titled that was downloaded to your PC and fill in the information for your users. The template contains a few populated rows, based on your account, to give you an idea of the required data. **DO NOT** use a different template or file. **DO NOT** add your own columns to the template.

A	B	C	D	E	F	G	H	I	J	K	L	M
extension*	domain	first name	last name*	login	portal pass	email addr	voicemail	departmer	site	vmail enat	answer tin	timezone
1000	esi.inhouse	{first name	{last name	1000@esi.		{email add	1234			yes	25	US/Central
1001	esi.inhouse	{first name	{last name	1001@esi.		{email add	1234			yes	25	US/Central
1002	esi.inhouse	{first name	{last name	1002@esi.		{email add	1234			yes	25	US/Central

The chart below gives instruction on the fields. Be aware that much of this information like domain name, caller ID, dial plan, will be automatically filled based on your domain account created by ESI Implementation.

Field	Example	Additional Information
extension*	1000	Required
domain	acme.com	
first name*	Bob	Required
last name*	Jones	Required
login	1000@acme.com	<ext>@<domain name>
portal password	It's recommended to not fill this in. When the user accesses my.esihs.net they will choose Forgot Password and set up their own.	
email address	bob.jones@acme.com	
voicemail pin	1234	You can enter whatever 4-digit PIN you'd like but it's strongly recommended you inform users to set their own PIN once they get access to the system.
department	Sales	
site	North Dallas	Most companies will not be set up to use or need this feature. It's very specific. If in doubt consult ESI Support.
vmail enabled	yes	
answer timeout	25	The number of seconds the user's phone/device will ring before going to voice mail or other programmed destination.
timezone	US/Central	
area code	972	
callerid number	9724229700	
callerid name	Acme	
911 callerid	{callid_emgr}	
dial plan	acme.com	
dial permission	US and Canada Only	
audio directory	yes	Audio directory is heard in the Auto Attendant for callers.
visual directory	yes	Visual directory is seen in eConsole, ePhoneGO2, and Webphone for fellow domain users.
vmail_transcribe	no	This is a paid service.
email_vmail	attnew	
email_vmail_enable	yes	
add phone extension	yes	
scope	Basic User	Refer to User Scopes section for details.

6. Once the CSV file is completed and saved go back to eConsole Users tab. Click Import Users button again, assuming you closed it.
7. Click Browse to find the CSV file you just completed.
8. Click Import. This should only take a few seconds even for a large import.

Import Errors
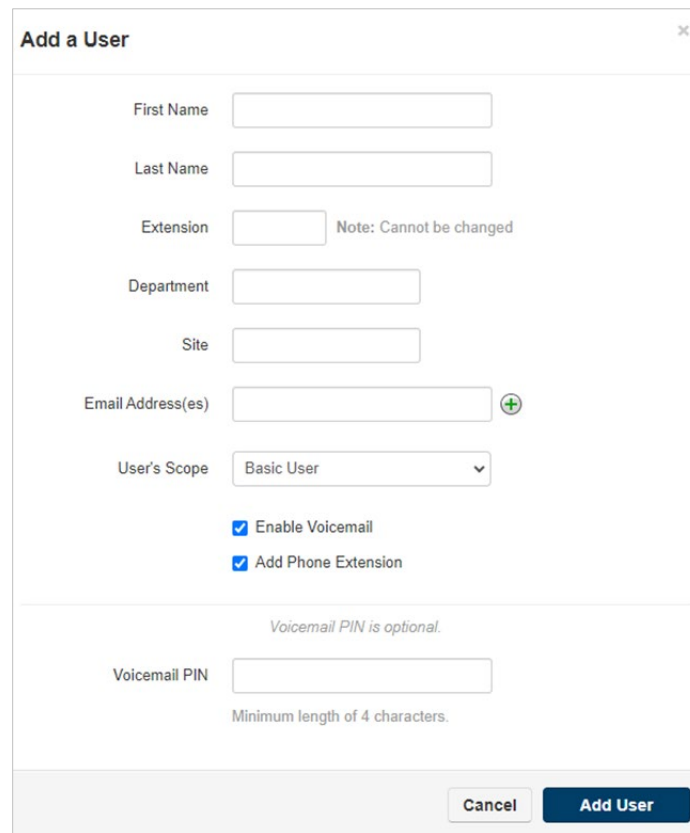
You may receive a notice of errors. The acceptable rows in the CSV file will import. But those with errors will not. Make a note of the errors you received. Go back to the saved CSV file. Fix those errors and Upload the file again. Or you could create a save a second CSV file of just the errored extension and upload that file instead. Using the same file over and over again will not create duplicate extensions in the system.

Shared Users

Shared Contacts will create contacts that will be shared across the organization for all users to have in the contacts.

Creating a New User

To create a new user click the Add User icon [Users]. Here you will see the option to Add User. Clicking the Add User button [Add User] will display the Add User window and fill out the fields with the collating information.
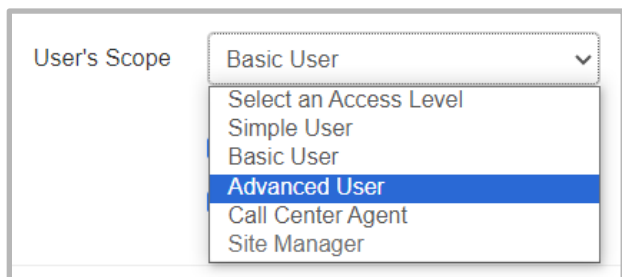
User Scopes (Seat Types)

Scopes are a level of permissions we assign to a User which provide them access to various features. Clicking the scopes drop down will display the various scope level that can be assigned to the new user.

Scope Name	ESI Seat Type
Simple User	
Basic User	Select, Metered
Advanced	Premier
Call Center Supervisor	Call Center Supervisor
Call Center Agent	Call Center Agent
Office Manager	Office Manager
Site Manager	Site Manager

Add Phone Extension

The Add phone extension option will create a device under the phones tab.

User Options

After the User has been created, click on the user to view an edit various options.

- Edit their profile information.
- Set answering rules.
- Configure voicemail options.
- Add a new phone to the users account by clicking the Add Phone button.
- Edit or Delete an existing phone.
- The Advanced Options allow you to reset the user.
- Send a Welcome with a link to configure their password and voicemail pin.
- Force Password Reset Allow you to change the user's password.

Hide System Users

The Hide System Users option on the Users home page will filter for just User's accounts. Uncheck will display Conferences Bridges, Auto Attendants, and Call Queues user accounts.

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Sites and Site Manager

Sites

A Site is a configurable group of Users and applications inside a domain. It allows for another level of granularity of management providing more flexibility and access to larger organizations, e.g. those with offices in different geographical locations.

A "Site" can be tagged to:
● A User
● A Call queue
● A Conference Bridge
● An Auto-Attendant

This feature provides a new tab under Users in the eConsole to manage Sites and its individual resources.
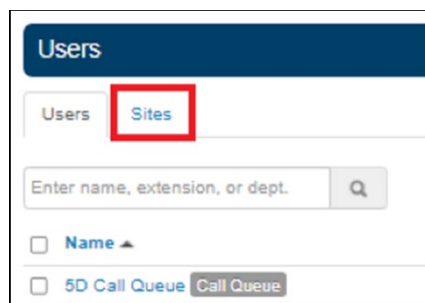
When you click "Add Site", a new panel is used to enter the Site Name and its associated attributes

Once Site(s) have been defined, new users or call queues can be defined for that Site.
An office manager will find a new field in the "Add a User" panel that allows you to select the site to which the new user belongs to.
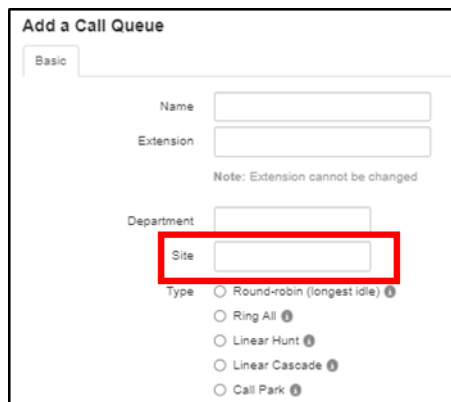

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An Office Manager can also move users to one of the existing Sites using the same field.

Similar to users, the Office Manager is now able to define Call Queues for a specific site.
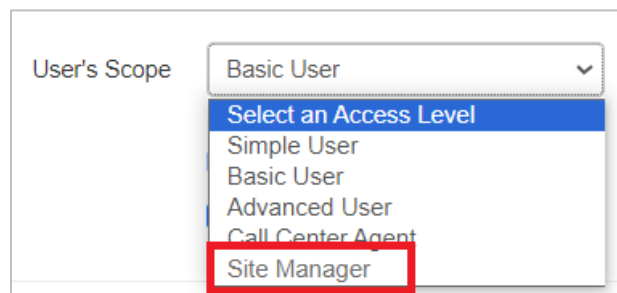
Site Manager

A Site Manager is a new User Scope that gives a particular user similar level of authority to that of an Office Manager but restricted to one particular Site. A Site manager can do the following for a Site:
● Add/Edit Users
● Add Call Queues
● Add Conference Bridges
● Edit numbers linked to resources it controls
● Edit MAC Addresses for users at that Site
● Modify MOH for its site to which all sites users will default.

Site Managers can see the following limited to their Site:
● Call History
● Active Call info (live and historic statistics)
● Resource counts (including API support)

The Site Manager scope is a new option in the dropdown menu in the User panel. The Office Manager assigns this new Scope to the User who will manage a particular Site.

Conferences

The Conference icon Conferences will take you to the Conference center, where you can manage your organization's conference bridges.

Conference bridges are used to make voice-based conference calls. A telephone call in which someone talks to several people at the same time. The conference calls may be designed to allow the called party to participate during the call, or the call may be set up so that the called party merely listens into the call and cannot speak. The Conference icon will take you to the Conference Center where you can control your organization's conference bridges.

Dedicated vs Owned Conference Bridge

Dedicated Conference Bridge - The Dedicated conference bridge options creates a conference bridge that only you will be able to modify.

- **Owned Conference Bridge** - The Owned Conference Bridge option creates a conference bridge that the owner can modify. For an owned conference bridge the system will ask you for the extension of the owner.
- **Dedicated Conference** Bridge - a standalone conference with its own unique extension. The Owned Conference type is a user owned conference that will be accessible through the user's portal. Owned Conference type allows for basic users to monitor and edit their own conference bridge. Bridge rules are as follows:
  - o If type Dedicated Conference Bridge is selected and the desired extension already exists, the conference will override the "Forward Always" rule for that extension and direct it to the conference bridge.
  - o Direct Dial must be set for an Owned Conference Bridge to be dialed directly like a user extension.
  - o Owned Conference Bridge type must be chosen for the conference bridge to appear in the owner's user portal.
  - o Choosing the Dedicated Conference Bridge type is best for when you want a shared conference bridge that many can use. This Conference is managed by an Office Manager.
  - o Choosing the Owned Conference Bridge type is best for when you want a conference bridge for an individual user. The owner can then manage the participants and settings from their user portal.
  - o Once an extension is assigned to a conference bridge it cannot be changed.

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Creating a new Conference Bridge

1. Login to eConsole as Office Manager
2. Access the Conferences tab in the left hand menu
3. Click the Add Conference button, which will present a pop-up window.
4. Complete the various fields, described below, and Save.

- **Direct Phone Dial -** The Direct Dial drop-down is what will be dialed to reach the user's conference bridge directly. If there are available phone numbers, you can assign them to the conference bridge by selecting them from the drop-down.

  If you do not see any phone numbers in the drop down that means there are no available phone numbers and one must be added to the inventory by your administrator or you can select a number already pointing to another destination and reconfigure to point to the conference bridge.

- **Leader PIN** - The Leader PIN is what people who will be administering the conference bridge enter when joining the conference. Leaders can enter star codes to manipulate the behavior of your conference bridge.
- **Participant PIN** - The Participant PIN can be used to limit who can and cannot enter the call without having any elevated privileges and only be able to listen and speak when unmuted.
- **Minimum Participants to Start** - Minimum participants to start will keep the Music-on-Hold playing until the minimum participants have joined the conference bridges.
- **Conference User Experience Options** - The Options let you control the user experience when a party joins the conference bridge.
- **Require a Leader** - Require a Leader to start will keep the Music-on-Hold playing for all parties until someone joins the conference bridge and enters the leader pin.
- **Prompt all participants for their name** - Prompt all participants for their name will ask the user to record their name and play the recording to people already in the conference bridge when joining.
- **Announce participant arrivals/departures** - Announce participant arrivals/departures will play the recording of the user's name when people enter or exit the conference bridge.

Conference Bridge Options

In the main conference window the following options are available, to the right of each bridge.

- **Conference Bridge Reports** - After the conference bridge has been created you will see the option to run reports on the usage of the conference bridge.
- **Edit Conference Bridge** - Edit the conference bridge allows you to change any of the options selected when creating a conference bridge expect the extension number. And the option to delete the conference bridge.
- **Delete Conference Bridge** - To delete click the red x that appears to the right of reports and the edit option.

Auto Attendants

Auto Attendants icon 📞 Auto Attendants ⓘ will take you to the Auto Attendants center as seen in figure 5.5.a. Auto Attendants are interactive voice recordings that allow callers to make selections in order to route their call to their desired destination.

The most common use case for an Auto Attendant is having the main company phone number pointed to an Auto Attendant. When callers then call into the business, they can be routed to the party they are trying to reach by listening to the menu prompt options or dialing a user's extension directly.

Clicking the Auto Attendants icon will take you to your Auto Attendant center.

Here you can Edit existing Auto Attendants, delete them, and create new ones.

Creating a new Auto Attendant

1. To add an Auto Attendant, click the Add Attendant button **Add Attendant** and an Add an Auto Attendant window will appear.

2. Name the Auto Attendant and give it an extension. The extension cannot be changed once the Auto Attendant has been created.
3. Select a Time Frame for the Auto Attendant to be in effect.
4. Click Add to create the Auto Attendant.

Intro Greeting

Once the Auto Attendant has been created click the Intro Greetings button to record the first message the caller will hear.

Clicking on the speaker next to the Manage Greetings will display the Manage Greetings window. Here you can Upload a new intro greeting or record a new one. Then you can select a time frame for that message so it will only play during the selected time frame.

Text-to-Speech

Text-to-Speech allows you, the user, to type words into eConsole for the greeting you want to play back to callers. Text can be entered in English, Spanish or French (Canadian), any one of those three languages is selectable for each greeting. The entered text will be played back as the voice you choose in the voice menu options.

Anywhere that normally required a person to record a greeting through the phone's handset or to upload a pre-recorded greeting can now use Text-to-Speech.

- Office managers
  - Auto Attendant intro greeting & menu greeting
  - User's voice mail greeting & recorded name
  - Call Queue greetings
  - Music-on-Hold messages
- Individual Users
  - Voice mail greeting
  - Recorded name

Setting up Text-to-Speech

- Log-in to eConsole as Office Manager or Individual User.
- Access the page within eConsole from where you record the greeting. For example, greetings for Auto Attendants will be found on the AA page. Greetings for voice mailbox will be found under Settings on the Message page.
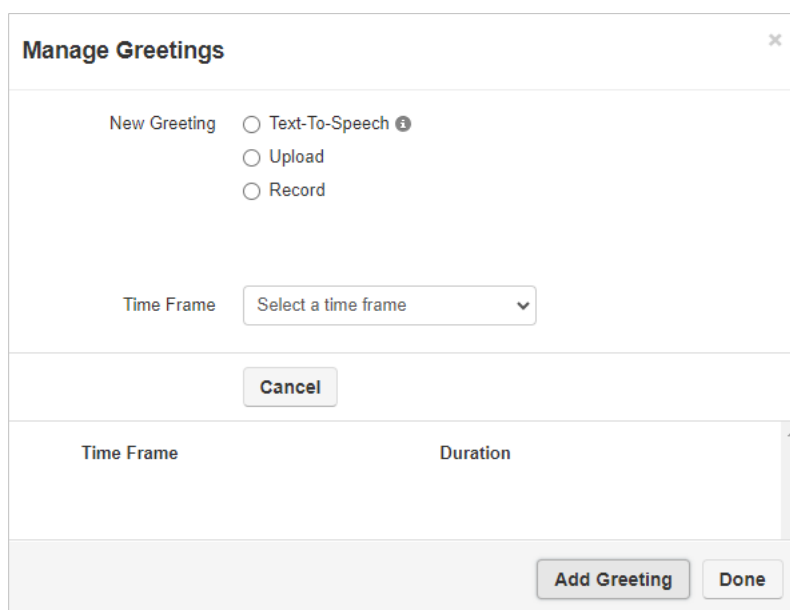- Click on the Manage Greeting icon or Edit Greeting/Prompt icon 🔊.
- Select Text-To-Speech.
- Select the desired language from the dropdown menu.
- Type the phrase that you want played back to callers.
- Select the desired voice.
- Click the playback button to verify the greeting sounds the way you want.
- Make any adjustments and Save.

Save the greeting itself and then Save changes to that page in eConsole.

Tips

- Do not enter carriage returns in the message box.

Good	Bad
For Sales press 1. For Support press 2. For Accounting press 3.	For Sales press 1. For Support press 2. For Accounting press 3.
Thanks for calling. I'm away from my desk right now so please leave me a message.	Thanks for calling. I'm away from my desk right now so please leave me a message.

- Enter a comma where you want a pause.

Examples
For Sales press 1, For Support press 2, For Accounting press 3.
Thanks for calling, I'm away from my desk right now so please leave me a message.

- Some words may need to be spelled phonetically.
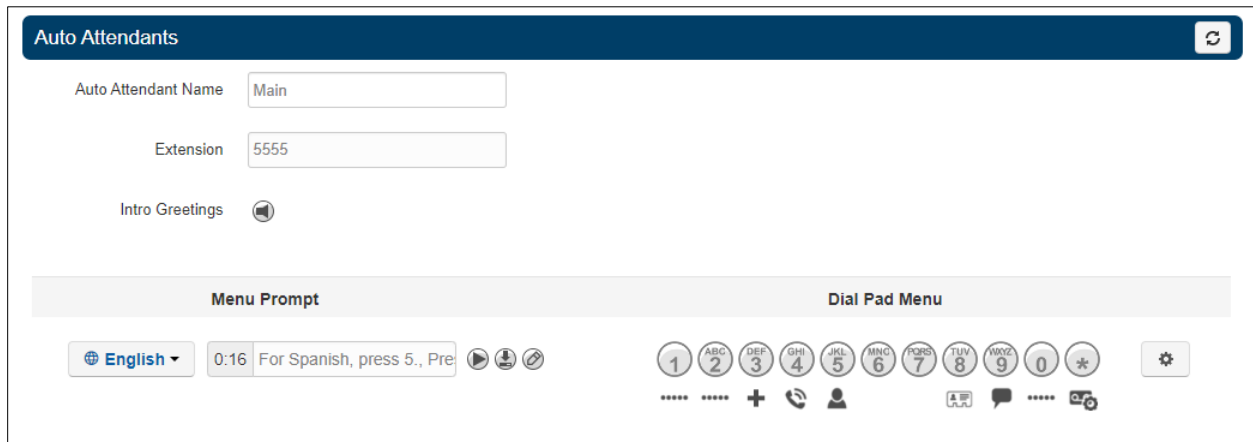
Examples	
"100"	"one hundred" or "one zero zero"
"Estech"	"Ez Tech"
"Amy Neidereiter"	"Amy Needer Rider"

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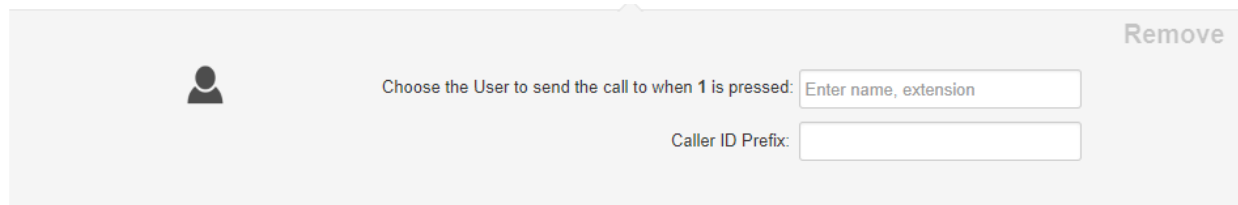
Menu Prompt

Clicking the edit icon ✏ next the auto attendant will take you to the Menu Prompt option and will allow you to record a message letting callers know what digits will route them to what application or destination.

Dial Pad Menu
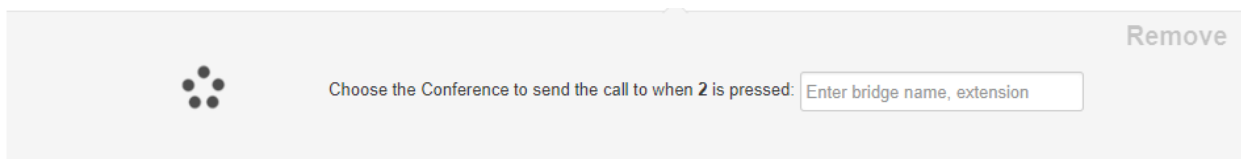
The Dial Pad Menu options is where you configure what digits correlate with an application. When you select a digit, you will see the applications you can choose from. Click on a digit and you will see the applications you can assign to it. When clicking on a digit and selecting an application you can see the options you can configure the application with.

- User - The User application as seen below will allow you to forward the caller to an extension on the system of another user. It will also give you the option to add a prefix to the call ID so the user that call is being forwarded to knows the call is being routed from an auto attendant.

- Conference - The Conference option as seen below will allow you to forward the call to the conference bridge you enter into the Enter bridge name, extension option field.

- Call Queue - Call Queues options as seen below allows the caller to be forwarded to a call queue.
    - o It also allows you to have the system announce the number of callers in the queue ahead of the caller.
    - o Or announce the average expected wait time.
    - o It also allows for a Caller ID prefix to be added so the agent in the queue knows the call was routed to them from an Auto Attendant.

Remove

```
•••••        Choose the Call Queue to send the call to when 1 is pressed: [Enter name, extension]
             Announcement for callers: ⦿ No announcement
                                       ○ Announce number of callers in queue
                                       ○ Announce average expected wait time
```

- Directory - Directory option as seen below sends the call to the company directory.

Remove

The company directory menu will play when **1** is pressed.

- Voicemail - Voicemail option as seen below will forward a caller to the voicemail extension entered.

Remove

Choose the Voicemail box to send the call to when **1** is pressed: [Enter name, extension]

- Voicemail Management - Voicemail Management option as seen below allows users on the system to enter their extension number and pin. Then they can check messages and manage their voicemail account.

Remove

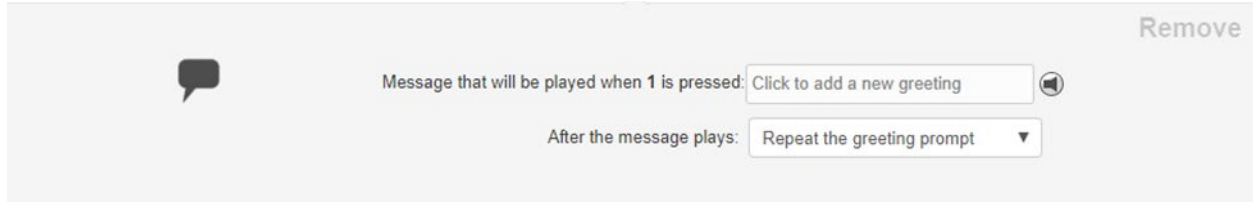The user will get a voicemail management prompt when **1** is pressed.

- External Number - External number option as seen below will forward the call to another telephone number.
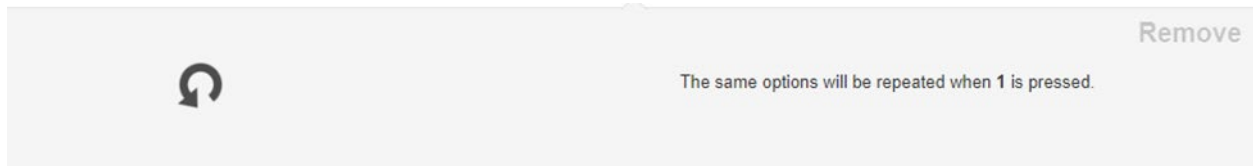
Remove

Enter the Phone Number to call to when **1** is pressed: [Enter a phone number...]

- Play Message - Play message option as seen below allows you to record a message that will be played to the caller. Then you can decide how to route the call after the message has been played.

   Repeat Prompt will replay the menu prompt message.

   Remove

   Message that will be played when **1** is pressed: Click to add a new greeting

   After the message plays: Repeat the greeting prompt ▼

- Repeat Prompt - Repeat Prompt will replay the menu prompt message.

   Remove

   The same options will be repeated when **1** is pressed.

- Add Tier - Add Tier option as seen below will allow you to add another dial pad menu to the auto attendant.

   +
   Add Tier
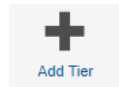
Once another tier has been added you will see the same options except for Add Tier. As you cannot add another tier. And the option for the Previous Menu appears so the caller can route back to the original Auto Attendant level. You cannot add a tier to 0 or the star key.

- Options - The Gear Icon ⚙ on the right takes you to the options settings window for the Auto Attendant where you can control the caller's experiences. There are basic options and speech keywords options tabs.
  - o Basic options
    - ▪ Enable Dial by Extension - Enable Dial by Extension allows you to enable calling an extension directly from the Auto Attendant if the caller knows the user's extension number.
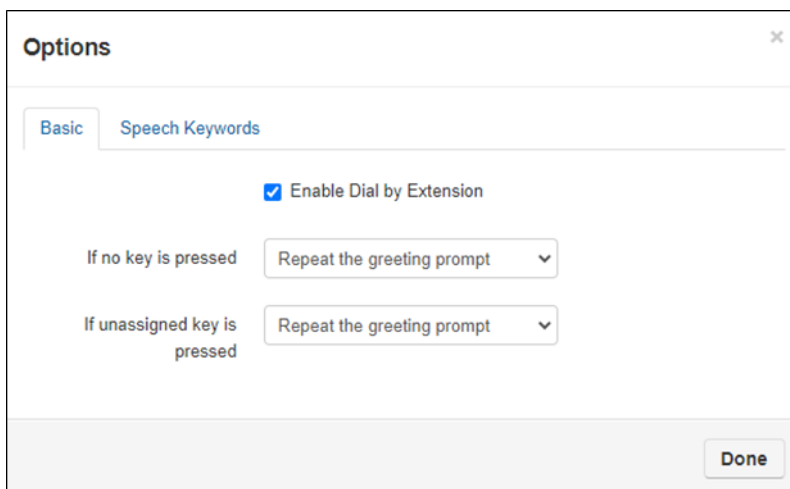   - ▪ If no key is pressed - Allows you to select a dial pad menu option, repeat the menu prompt recording, or hang up the call if no digit is pressed when the caller is in the Auto Attendant.
    - ▪ If unassigned key is pressed - Configure what to do with the call if the caller does not press any digits when in the auto attendant and what do to if the caller presses a key that is not configured in the Dial Pad.

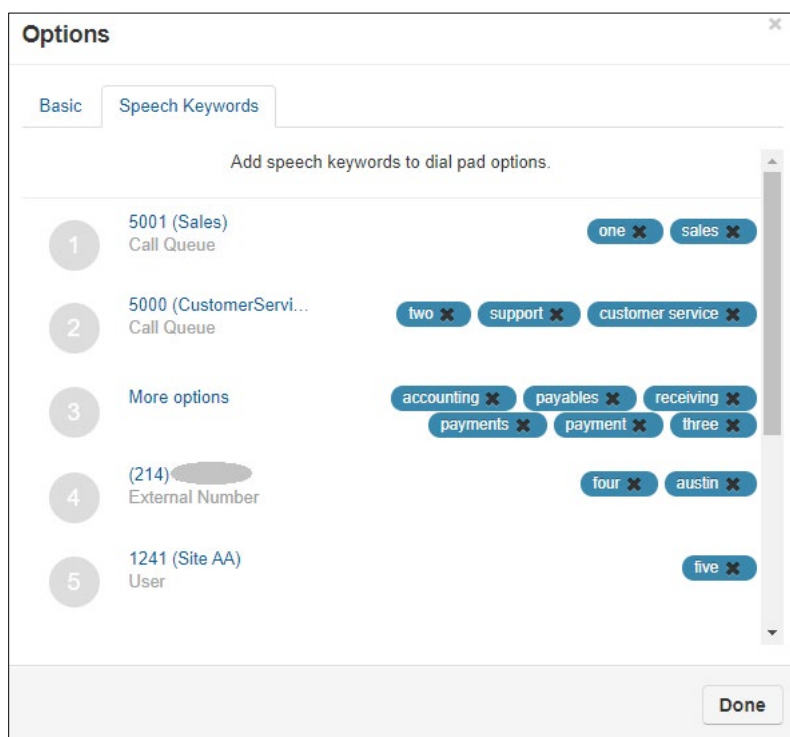- Speech keywords options - This will allow certain spoken key words to be recognized and acted upon. In the example below, spoken numbers and words are configured to send a call to a certain department or extension.

Speech Recognition for Auto Attendants

General

This guide outlines how to configure and use Speech Recognition for Auto-Attendants. Speech Recognition can be enabled for an existing Auto-Attendant or when defining a new one.

Speech Recognition is available in English, Spanish or French (Canadian).

Enabling Speech Recognition

This feature is available to Office Managers, Reseller, and Super Users seat types for an additional monthly fee.

- Login as eConsole
- Click Auto Attendants in the left navigation menu
- Select the language you want to use from the dropdown menu.

- Select Dial Pad Menu Options (gear icon)

- In the window pop-up, choose the Speech Keywords tab. You will see the digits configured in the Dial Pad Menu and the destination they are routed to.

- Click on a digit and a field will appear. Enter the words you would like to use in order to match this option. For example, if you wanted the number 1 to route to an accounting department you could use the words one, accounting, billing, payments, or invoices; so when callers say those keywords it will route the caller to the destination configured.
- Enter each individual keyword(s) followed by the **Add** button or by hitting enter on your keyboard. The keywords will be displayed as **chips** in the top right; as shown below. Any Keyword that you may consider unnecessary can be deleted by clicking on the "X" on the corresponding chip.
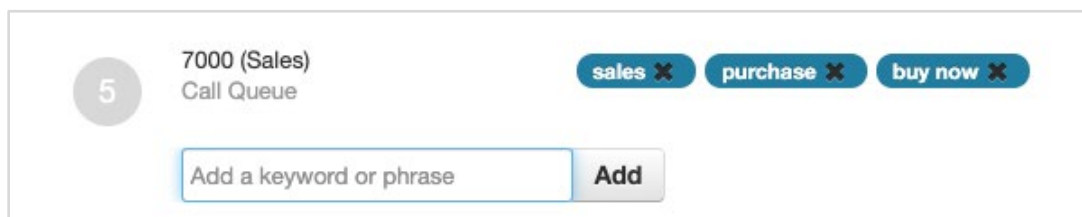
- Repeat the process for each key in the Attendant's menu where you would like to have speech recognition.
- Click Save in the popup window and also on the main Auto Attendant page.

Using Speech Recognition

Navigating menus

- Once speech recognition has been enabled for the Auto-Attendant, callers will be able to navigate the menus by simply saying what option they are trying to reach, e.g. saying "SALES" rather than dialing 1 (if 1 was defined as the option to reach sales).
- Callers will be able to say the option they want to select while an announcement is being played, just like when dialing a number on their phone's keypad.
- Callers however; cannot interrupt the greeting in the main menu and say an extension number to reach the person at that extension although they can dial that extension number to do so.

Company Directory

- When reaching a Company's Directory, callers can now say the name of the person they are trying to reach rather than dialing the extension number or the digits that correspond to the first three letters of that person's last name.
- When multiple entries for a name are found; let's say the caller wanted to talk to Peter Williams and there are 3 employees with the last name Williams in the company, the Attendant will play the names of the available choices. For example: if there are two employees with the last name Williams, the caller will hear something like "press 1 for John Williams", "press 2 for Peter Williams". Now the caller can simply say "two" to reach Peter Williams.

Tips

- Make sure not to use the same keyword for more than one key in the attendant's menu as this will result in calls possibly being routed to the incorrect destination. When the same keyword is used in more than one option in the menu, the system will connect the caller to the first option in the menu that has that keyword defined, For example: Keys 4 and 8 have been setup with the keyword "directory". Key 8 does connect the caller to the company's directory and 4 to the accounting department. When a caller wanting to reach the company by name says "directory" from the main menu, he/she will be redirected to accounting.

Call Queues

The Call Queues icon [••• Call Queues] will take you to the Call Queues center.

A Call Queues is place holders for calls to sit waiting to be answered. A call queue can be configured to ring multiple devices in a certain order or a parking lot for a call to sit and wait until someone retrieves the call. Most call queues are created to be used in a call/contact center environment. This section will explain how to create a new call queue, which can only be done by Office Managers. However details on configuring a queue are discussed in the eCloud Call Center User's Guide 0455-0015 located in the ESI Resource Library.

To navigate to the Call Queues center, select Call Queues. If the domain has any Call Queues configured, you will see them displayed here.

Call Queues							
							Add Call Queue
Name ▲	Extension	Department	Site	Type	Callers in Queue	Agents (Available)	
5003	Operator			Linear Hunt	0	2 (1)	👤 🎵 ✎ ✖
Accounting	5002			Ring All	0	10 (0)	👤 🎵 ✎ ✖

Inventory

The Inventory icon is where you can control where Phone Numbers are routed for voice calls and SMS messages. This is also where you can configure devices to user's accounts. Clicking the Inventory icon will take you to the Inventory Phone Numbers tab.

Phone numbers (10 digit public numbers), SMS numbers, phone hardware, fax accounts, emergency endpoints, and emergency addresses / numbers (legacy) are stored in the Inventory page of the eConsole

Phone Numbers

This will take you to the Phone Numbers tab where all the Phone Numbers available to your organization are listed and allows you to manage how a particular phone number is used within your domain.

Clicking the Edit icon to the far right of the phone number will allow you to change how that number is used.

Treatment

The treatment drop-down allows you to select how that number will be used within the domain, which includes things such as a User, Call Queue or Auto Attendant. Once the Treatment has been selected from the drop-down a User field will appear and allow you to enter the user's extension as the destination.

- Available Number - This option will keep the number available and will have the phone number appear in the drop down for application options offering for a direct number to be selected.
- User - User will allow you to select a user's extension in the organization to route the calls to. This will effectively turn the number into the DID (dial Inward Dialing number for that user.
- Conference - Conference will allow you to select a conference bridge to send the call to.
- Call Queues - Call Queues will allow you to select a call queue to route the phone number to. It will also let you select the options to set Announcement for callers to the following:
  - No announcement - Will not play any announcement to the caller being routed to the queue.
  - Announce number of callers in queue - Will let the caller know how many callers in the queue are ahead of them.
  - Announce average expected wait time - Calculates from the previous call how long it expects the new caller to wait before reaching an agent and provides the caller with an estimated wait time.

- Voicemail - Selecting Voicemail as the treatment will allow you to send the caller to a voicemail box of a user on the system. You will also see the option Enable enhanced voicemail appear. When enabled, it will allow the caller to press 0 to be routed out of the voicemail box.
- Auto Attendant - When selecting Auto Attendant the Auto Attendant field appears which will allow you to select which Auto Attendant you would like the call routed to.
- Enable Time Frame - The Enable Time Frame Option will allow you to configure the phone number to route the call to different destinations throughout the day based off the time frame selected. After selecting yes the Select time frame for new rule and Timezone drop downs appear. Here you select a time frame from the drop down then select the application and destination you would like the call routed to.

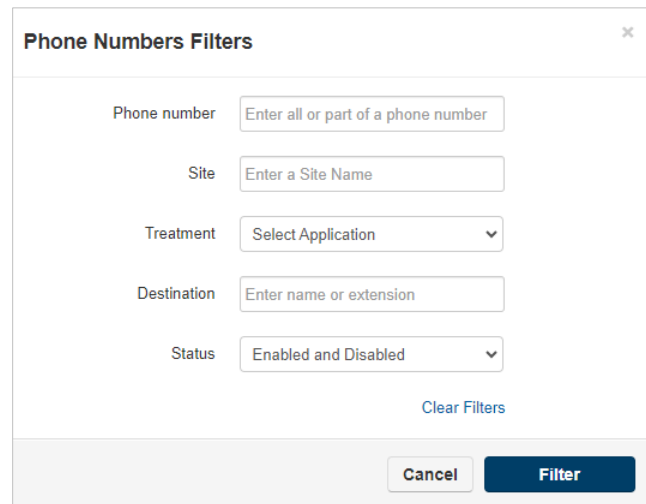- Notes - Notes allow you to add a description to the telephone number that can help you identify what this number is used for in the future.

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Filter

The Filter button as seen in figure 5.8.a allows you to search for Phone Numbers based on the Phone Number, Treatment, Destination, or Status. Clicking the filter button will display the Phone Number Filters window.

Export

You can also Export your Phone Numbers into a CSV file by clicking the Export button and saving the file to your computer.

Phone Numbers Filters ✕

Phone number   Enter all or part of a phone number

Site   Enter a Site Name

Treatment   Select Application

Destination   Enter name or extension

Status   Enabled and Disabled

Clear Filters

Cancel   **Filter**

eCloud PBX and 911

Providing accurate location information for emergency services when an employee calls 911 is critical for any company or individual. This has become more relevant in the past two years as new federal regulations have come into effect. The main two laws that all companies should be aware of are Kari's Law and Ray Baum's Act.

Detailed information on these laws and how ESI services meet these requirements can be found on the Academy (click [here](#))

- Kari's Law went into effect in Jan 2020.
- Ray Baum's Act goes into effect on Jan 6, 2021.

The main component of the Ray Baum's Act refers to a *Dispatchable Location*. It's essentially a detailed location that's provided to 911 and emergency services. ESI has always offered a location associated with the DID but we're now required to provide more information about that address, if applicable. The purpose of this act is to provide better location information so emergency services can find the 911 caller quicker.

Before 2021 if you worked in an office building, for example, you'd be required to give the main address - 100 Main St. Now you'll be required to give the floor, room, suite or other information - 100 Main St, Floor 5, Suite 508 - if applicable.

Your Company's e911 Information

Before making any changes to DIDs and addresses, take a step back so you understand the who, what, and where of your employees. Remember when dealing with locations for 911 numbers, always ask yourself, "How will emergency services find me/the employee?"

Typically when we think of 911 and location information (where emergency services are sent) we typically think of one phone number and one location. But that doesn't often reflect reality, especially since an increase in remote workers since 2020. As the Office Manager or Certified ESI eCloud Partner you'll need to analyze

- Where are the employees located? Where do they perform their work?
- Do they have more than one device that they use at that location(s)?

When you have that information pulled together it'll be much easier to establish which DIDs are needed for e911 and the associated address locations. For example if you know there are 10 remote workers then you'll need the home addresses of those 10 employees.

Scenario Example

To make this clearer let's start off with an example of a typical company and how they'd set up their e911.

Scenario:

Acme, Inc is comprised of 30 employees. Twenty employees work from the office and 10 work from home. Those that work from home use their ESI Webphone (softphone).

	Acme Office	**Jane Doe**
Employee	20 users All desk phones	Remote Worker Webphone - x1000wp
Address Line 1	100 Acme Ave	999 Fake St
Address Line 2	Floor 2, Suite 201	
C/S/Z	Denver, CO 80014	Dallas, TX 75087
Device Type	Desk phones	Webphone
DIDs	The company has over 30 DIDs but these are the BTN/main numbers that they advertise and use for outbound Caller ID. 720-555-1234 800-555-1234	Most ESI eCloud users receive a dedicated DID. This is the one assigned to Jane. 972-555-1234

The size of the office is such that the office employees fit within a large area (cubicle farm) with a few offices in front. For e911 the logical method is to use DID 720-555-1234 as the office outbound 911 DID. Use the office address for this DID. Anyone (employee, visitor, cleaning crew, vendor) dialing 911 from a desk phone at the office will send the Denver address to 911 Services.

If…

1. The office spanned more than one floor, one suite, one building; you'd need a separate DID for those groups of employees and that DID would reflect the appropriate address/location.
   ○ Example: 15 employees/phones are on floor 2 and another 15 are on floor 3. You'd need two DIDs and Line 2 of the address location would reflect the appropriate floor and suite number.
2. Similar to number 1 where the employees are in one space but the space is much larger.
   ○ You'd want to update Address Line 2 of the appropriate 911 DIDs to reflect East, West, North or South.

You would provide the same set up for Jane Doe, the remote worker, as you would for the office. But in her case she'll use 972-555-1234 for her outbound 911 DID, which would use her home address in Dallas. Each remote worker would be set up in the same way.

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Assembling Your e911 Inventory List

Any DIDs associated with your site will be listed under Inventory in eConsole. You can access this tab as an Office Manager, Reseller, or Super User (ESI only).

Tip: Export the DID list to a CSV file and use it to group employees by location and log address information. Then use this file for reference when setting up the 911 DIDs.

Below is an example of a DID Inventory export that was modified to add 911 information. While this list can't be re-imported into eConsole it's an easy way to find the information when you're ready to update eConsole.

You wouldn't have to use this CSV file permanently but it's a great way to gather and execute 911 information when starting out. Once that's set in eConsole it's a matter of maintaining the entered information (in eConsole).

Phone Number	Treatment	Destination	Notes	911 Location	Which Extensions
720-555-1234	Auto Attendant	x3000	Outbound CID	100 Acme Ave FL 2 STE 201 Denver, CO 80014	All Extensions
800-555-1234	Call Queue	x4000	Sales Promo DID	N/A for 911	N/A
972-555-1234	User	x1000 (Jane)	Remote worker	999 Fake St Dallas, TX 75087	x1000 (Jane)
972-555-1235	User	x1001 (Annie)	Remote worker	888 Apple Ave Phoenix, AZ 12345	x1001 (Annie)
972-555-1236	User	x1002 (Bob)	Remote worker	777 Bobcat Chico, CA 12345	x1002 (Bob)
972-555-1237	User	x1003 (Carl)	Remote worker	555 Cookie Cr Austin, TX 12345	x1003 (Carl)
972-555-1238	User	x1004 (Denise)	Remote worker	444 Dongle Dr Tulsa, OK 12345	x1004 (Denise)
972-555-1239	User	x1005 (Ed)	Remote worker	333 Electric St. Paul, MN 12345	x1005 (Ed)
972-555-1240	User	x1006 (Frank)	Remote worker	222 Funky Albany, NY 12345	x1006 (Frank)
972-555-1241	User	x1007 (Gabby)	Remote worker	111 Goody El Paso, TX 12345	x1007 (Gabby)
972-555-1242	User	x1008 (Henry)	Remote worker	987 High Hill Atlanta, GA 12345	x1008 (Henry)
972-555-1243	User	x1009 (Irene)	Remote worker	123 Icon Seattle, WA 12345	x1009 (Irene)

Accessing 911 Numbers

You can manage 911 location information via eConsole if you use ESI's eCloud hosted PBX platform or ESI Registered SIP Trunks.

1. Launch eConsole (my.esihs.net) and login.
   a. If your site does not have an Office Manager account or you cannot remember the login please contact ESI eCloud Support.
2. Click on Inventory in the left navigation panel, then choose the 911 Numbers tab.   Below is an example of that tab.

911 Number	Status	CallerID Name	Users	
1 (972) 332-	Not Provisioned		1	
1 (972) 422-9700	OK	ESI	123	⊘ ⊗
1 (972) 535-	Not Provisioned		1	
1 (972) 535-	OK	Rick Lucan	1	

- **911 Number** - only a portion of the DIDs the site owns will appear in this tab. Regardless of which numbers are present you'll need to go through each one and validate the address information.
  Note: if the DID you're looking for is not listed in this tab click **Add 911 Number** in the upper right corner.

- **Status** - By default the 911 DIDs in this tab will appear as *Not Provisioned*. Click on each number to validate the address and save.
  Note: ESI Implementation team would have established your 911 location when you first purchased ESI eCloud services. That means just because you see 'not provisioned' doesn't mean 911 services doesn't have your information. It's that this information has not been validated via eConsole before.

- **Caller ID** – the name given to each 911 DID.
- **Users** – the number of users (extensions) use this DID when dialing 911. In this example 268 extensions on the ESI Office domain present 972-422-9700 and its associated location to 911 operators when those extensions dial 911.
- Numbers in this view cannot be deleted; they can only be de-validated, which will remove address information from that DID.

Adding & Editing a 911 Number

1. To add a 911 number click **Add 911 Number** in the upper right corner of the 911 Numbers tab. To edit a number simply click on the desired number in the list.
2. Complete the information in the pop up window.
3. Don't forget to Validate and Save.

WARNING: The information entered must be correct. Incorrect information could delay emergency services and incur a $100 fee from ESI.
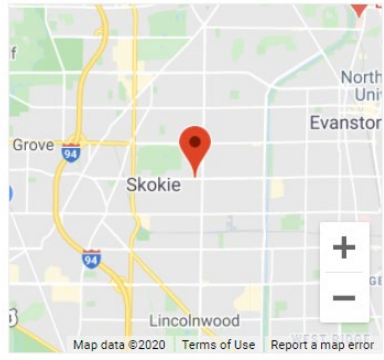
Address Examples - Line 1 vs. Line 2

- If the address is my home, which is a house (single family dwelling) then line 1 is all that's needed. Ex: 100 Acme Ave
- If the address is my home, which is an apartment complex then line 1 and line 2 are needed. Ex: 100 Acme Ave, APT 201
- If the address is my office/work but it's a small footprint in a standalone building (McDonald's, Starbucks, standalone dentist office, etc.) then line 1 is all that's needed. Ex: 100 Example Dr.
- If the address is my office/work, but is in a strip mall or office building then line 2 is needed. Same applies for an office that has a large footprint (entire floor of an office building, school campus, etc.). Ex: 100 Example Dr., Floor 3, Suite 304

Important Tip: When using words in line 2 like 'floor', 'suite', 'room', etc. simply spell them out. When clicking Save in eConsole these words will be updated with correct 911 abbreviations. For example 'floor' will become "FL".

911 Address Abbreviations

Below are valid, commonly used abbreviations.

Input Unit Type	Abbreviated Unit Type
APARTMENT	APT
BASEMENT	BSMT
BUILDING	BLDG
DEPARTMENT	DEPT
FLOOR	FL
FRONT	FRNT
HANGAR	HNGR
LOBBY	LBBY
LOT	LOT
LOWER	LOWR
OFFICE	OFC
PENTHOUSE	PH
PIER	PIER
REAR	REAR
ROOM	RM
SIDE	SIDE
SLIP	SLIP
SPACE	SPC
STOP	STOP
SUITE	STE
TRAILER	TRLR
UNIT	UNIT
UPPER	UPPR

Here is a link to standard address abbreviations from the USPS:

https://pe.usps.com/text/pub28/28apc_002.htm

Validating an Address

Once the address has been entered it must be validated.

1. Click **Validate** in the popup window.
   - If the address is invalid you'll see the following notice below the map view.

   > The entered address could not be found. Please make sure there are no errors or enter a different address.

   - If the address is valid you'll see the following notice below the map view.

   > The address has been confirmed and any suggested changes have been applied.

Auto corrections are made to the address when validating.

In the example to the left I originally entered the following.

> 100 Main St
> Ste A
> Chicago, IL 60076

When clicking **Validate** the address was updated to refer to Stokie as the City, not Chicago. Stokie is the correct city, which is a suburb of Chicago.

Add number

This is the address Emergency Services will receive when called.

911 Number
9725551234

Caller Name
Acme Inc

Address
100 MAIN ST

STE A

Country
United States

State/Province
Illinois

City
SKOKIE

ZIP Code
60076

Validate a new address before saving. All fields must be filled out before validating.

Cancel | **Validate**

2. Be sure to click **Save** after validating the address.

3. Once saved the 911 DID tab in eConsole will update to show **OK** for that DID as opposed to **Not Provisioned**.
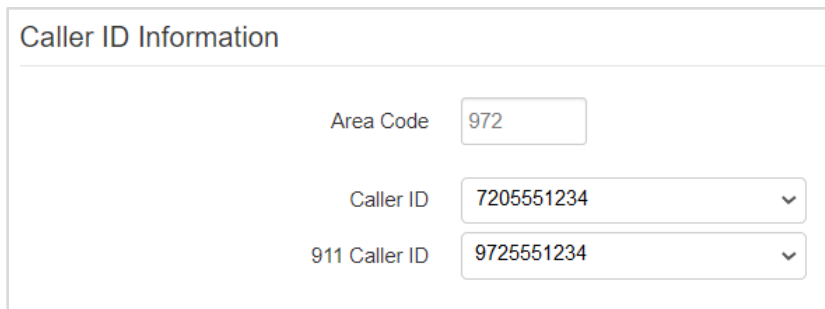
WARNING: While the 911 Number tab does not allow you to enter an invalid, unrecognized address it's still possible to enter a location that's inaccurate, such as, the wrong suite or building number. The information entered must be correct. If the e911 address is not provided or is incorrect and an emergency call is made, ESI reserves the right to charge $100 for each 911 call made.

Assigning a 911 DID to an Extension

Now that the DIDs and addresses are updated, go to each extensions and ensure their outbound 911 Caller ID is set to the correct DID.

To set this up

● Login to eConsole (my.esihs.net)
● Go to Users and select the desired extension.
● Update the Caller ID Information section on the profile screen.
  ○ **Caller ID** - this is the CID that will be presented on normal, everyday outbound calls. Has nothing to do with 911.
  ○ **911 Caller ID** - this is the CID (and its associated address) that will be presented to 911 Service when 911 is called from this extension.

● Click Save

SIP Trunks and 911

If the site is using **registered** ESI SIP Trunks, the ESI Certified Partner will be able to manage the 911 DIDs via eConsole.

Management of static SIP trunks is not supported in eConsole.

If the site is using SIP Trunks not provided by ESI, they'll need to contact the provider of those trunks to update their 911 information.

Note: the site is using an ESI premised-based phone system with PRI or Analog trunks it's up to the site to work with their ESI Partner and the carrier of their voice service to establish 911 information.

Testing 911 Service

ESI encourages our customers to test e911 services once it is properly configured. Testing of e911 services can be done by simply dialing 933 on your ESI phone. An automated attendant will respond with the phone number and address on file for 911 services for that phone.

If the information provided by the auto attendant is incorrect, access the 911 Numbers tab to update, validate, and save the correct information. If you've done this and continue to have issues please contact our ESI Certified Partner or ESI Customer Support.

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SMS Numbers tab

The SMS Numbers tab lists all phone numbers that have been provisioned for SMS. This feature is for texting to and from a user's DID number to any SMS enabled number (wireline number or wireless number).

Clicking the edit icon to the far right of the number will bring up the Edit window and allow you to select either a user or a call queue for which you would like to enable SMS service.

Phone Hardware tab

The Phone Hardware tab as seen below will list all the devices configured on your organization. Each device in the list is identified by its unique MAC address. A MAC (Media Access Control) address, is a unique, 12-character alphanumeric attribute that is used to identify individual electronic devices on a network. You will also see the corresponding device model and the extension associated to that device. You can select devices individually or in bulk by checking the boxes on the left.

- The Notes field allows you to add additional information you may find helpful.

Export

The Export button on the Phone Hardware tab allows you to Export your list of devices into a .csv file. Select which devices to export by checking the box on the left then by clicking Export.

Fax Accounts
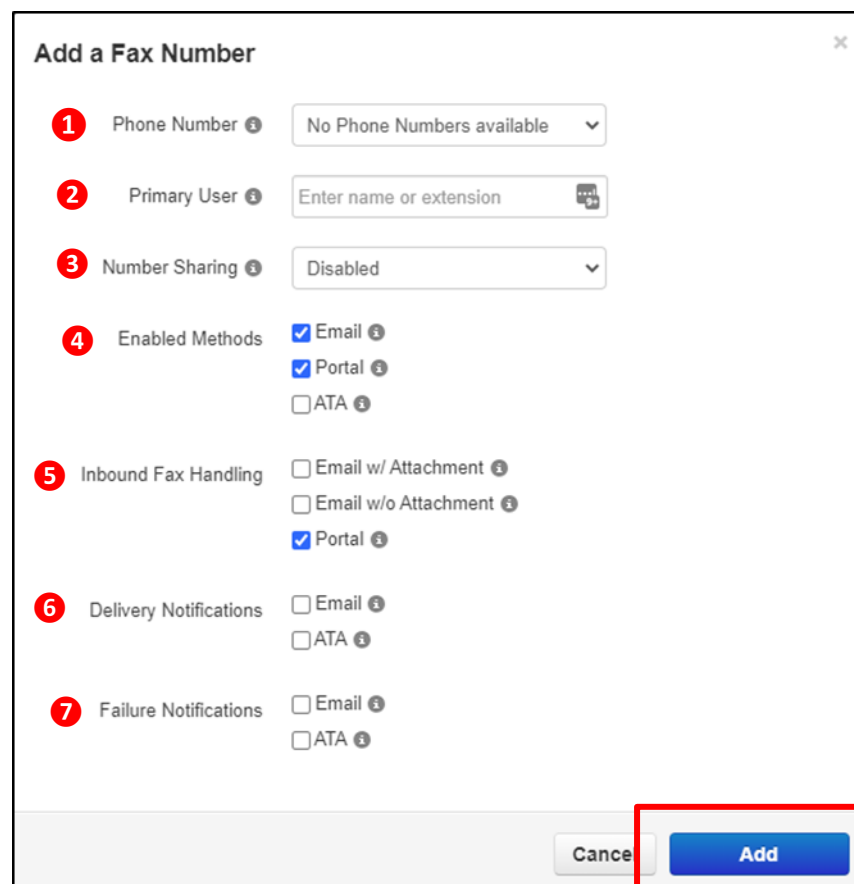
This tab allows you to add fax numbers by clicking Add Fax Number **Add Fax Number** .

Adding fax numbers

This is an Office Manager's procedure. Navigate to **Inventory** -> **Fax Accounts**. Click on the **Add Fax Number** button.
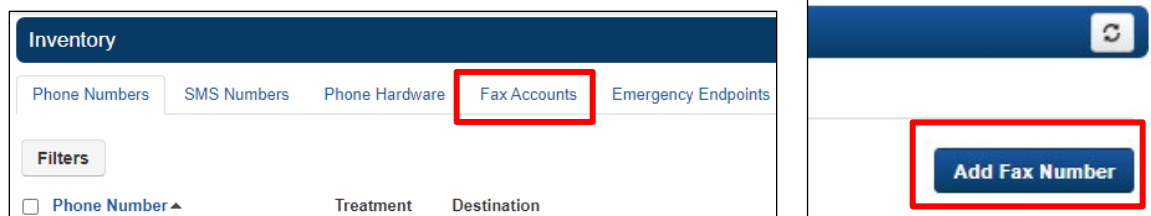
When the **Add a Fax Number** modal is presented, select an available number. These numbers are pulled from the domain's inventory. Only DIDs that have the treatment set as **Fax Server** or **Available DID** will show in the dropdown. When adding as a new fax number, only select an available DID.

Finish selecting the following options in the **Add a Fax Number** modal. Click **Add** when finished.

❶ **Phone Number**: Select an available number.

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❷ **Primary User**: Who will own this fax account number? This user will have faxes available in their portal and allow them to manage inbound settings for this account.

❸ **Number Sharing**: Select whether this number can be shared with other users or with everyone. Select disabled if this number should only be used by the Primary User. For more information, please refer to the section titled "Sharing a fax service" in this document.

❹ **Enabled Methods**: Select the applicable handling methods for this DID. If using an ATA, then a serial number must be entered.

❺ **Inbound Fax Handling**: When a fax is received for this account, select whether the fax should be emailed with attachment or emailed without attachment. Additionally, select whether or not the fax should remain in the portal.

❻ **Delivery Notifications**: Select whether to send an email notification when an outbound fax through the portal is successful and/or select whether to send an ATA notification to the fax machine when an outbound fax through the portal is successful.

❼ **Failure Notifications**: Select whether to send an email notification when an outbound fax through the portal fails and/or select whether to send an ATA notification to the fax machine when an outbound fax through the portal fails. Then Click on the **Add** button.

The account will now be created on the server. The DID number will also be updated in the DID table to "Fax Server" treatment.

Call History
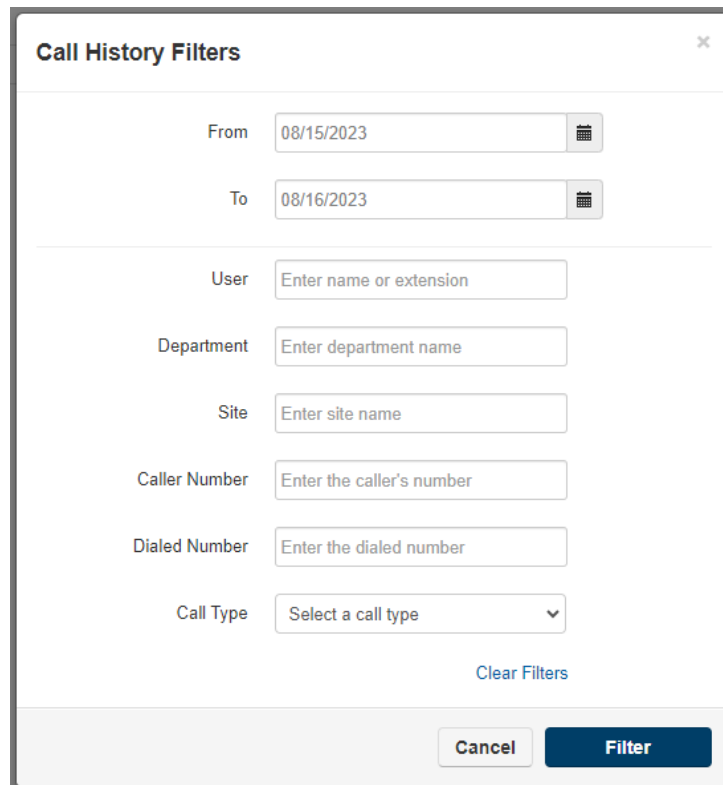
The Call History icon ▤ Call History will take you to the Call History page where you will view the calls made on your domain for the specified date range. The call record will show To and From whom the call was made.

Call History								⟳
Filters 08/15/2023 — 08/16/2023								Export
From Name	**From**	**QOS**	**Dialed**	**To**	**QOS**	**Date**	**Duration**	
1012 Test	1012		1013	VMail (1013)		Yesterday, 2:03 pm	0:05	
1015 Tony	1015		1010	1010		Yesterday, 2:02 pm	0:47	
1013 Tommy	1013		1010	1010		Yesterday, 2:02 pm	0:41	
1012 Test	1012		1010	1010		Yesterday, 2:02 pm	0:58	

Call History Filters

You can change the date range by clicking the Filters button Filters .

After clicking the filter button, the Call History Filters window will appear. Here you can change the Call History date range, user, department, site, caller number, dialed number and call type.

- **From** - Select a date.
- **To** - Select a date that is greater than the From date.
- **User** - Enter the extension number of a specific user.
- **Department** - Enter a department name.
- **Site** - Enter the site name on which the user resides.
- **Caller Number** - Allows you to search for calls from a specific phone number by entering the number into the Caller Number field.
- **Dialed Number** - The Dialed Number field will let you filter for a specific number that you dialed.
- **Call Type** - The Call Type drop down lets you filter based on the type of call. Inbound, Outbound, or Missed call.
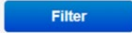
Calls Displayed

Clicking the Filter button will then display the calls that match the filter criteria.

You can set the Call History to display 15, 25, 50, and 100 calls per page.

Exporting Call History

The export icon allows you to download the call history into a csv file that can be opened in any spreadsheet application such as Excel or Apache Open Office.

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Cradle to Grave

Available for office managers and contact center supervisors, a call trace is a comprehensive listing of all technical information captured during a call from the moment a connection is first being attempted until the call ends. Cradle to Grave is a call trace functionality, but it presents the resulting call data in accessible terms rather than technical call flows. Cradle to Grave is available through the call history tab in the eConsole.

By Clicking on the Cradle To Grave icon shown in the picture above, a new panel will open up showing a simplified sequence of events that occurred for that particular call. The picture below shows an example of such sequence.
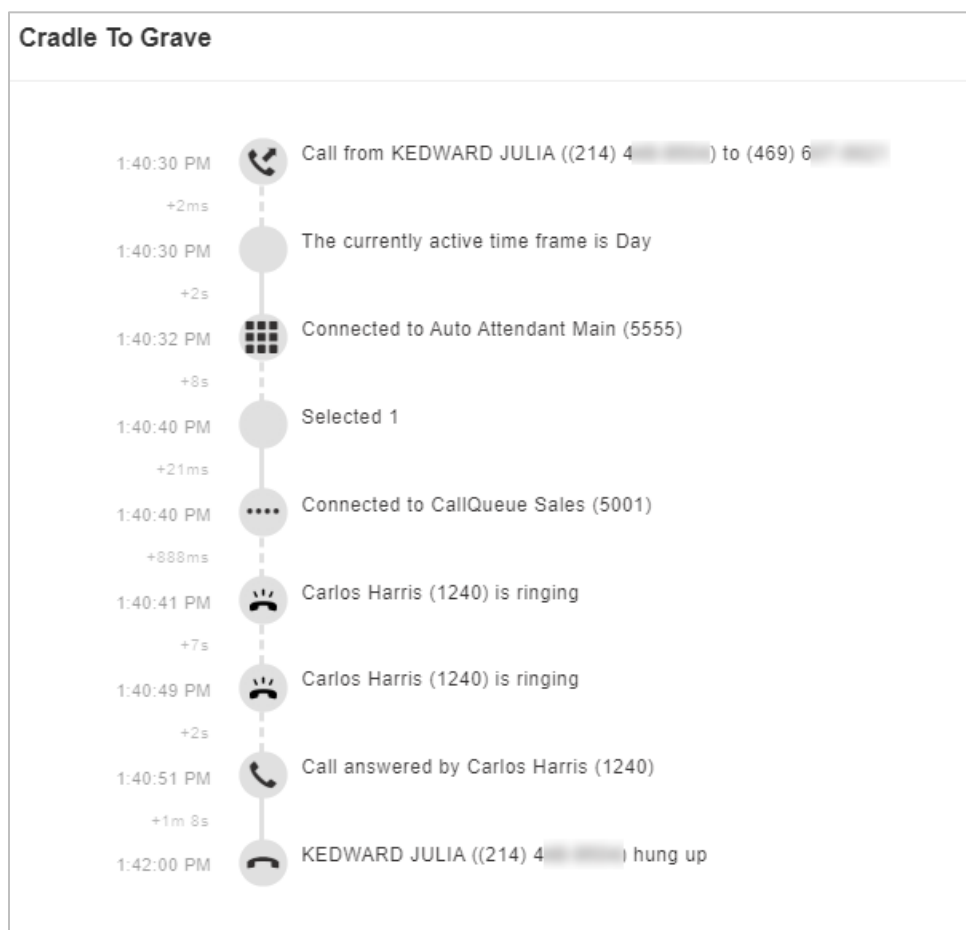
Bulk Call Recording Downloads

The Bulk Recording Downloads feature gives Office Managers the ability to download all recordings associated with eCloud's Call Logging feature. These recordings can be kept on your company server for safe keeping for as long as necessary.

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How does it work?

At the end of each day, the call recordings will be compressed into a .ZIP file and made available for download through ESI eConsole. Once in eConsole the file can be downloaded to a user-defined location. The individual recordings are standard .WAV files.

How long are the recordings kept on the system?

See the chart below. It's important to understand the distinction between an individual call logging recording and a .ZIP file containing copies of multiple call logging recordings. The ZIP file is only kept for 30 days, while the individual recordings are kept for 90 days. Either type is accessed through the eConsole for Office Managers. Therefore you still have access to those recordings for 90 days and you can still download them individually.

Example: You have a .zip file that was created on October 1, 2018. You must download this file from eConsole by 11:59 PM on Oct. 30, 2018. At midnight on October 30th, the .zip file will be purged. Remember, the individual recordings remain available for 90 days.

How do I get access to this feature?

Call your ESI Sales Representative. Once the feature is ordered it will be enabled by the ESI Implementation Team.

Important Notes:

- Only Office Managers have access to the Bulk Recording Download feature.
- Recordings are downloaded by domain (office, site). Therefore, if you are a business that has multiple offices and each office has its own eCloud domain, the Office Manager will only see recordings associated with the domain/site they are logged in to (via eConsole). However, once the recordings are downloaded, the business can choose to keep all the recording files in one central location.
- The Bulk Download feature does not include personally recorded calls. These are recordings generated when pressing the RECORD button on the ESI SIP phone.

Each day's zipped file must be downloaded from eConsole one at a time. We do not currently offer a "Download All" function, however we do have this identified as a future enhancement.

Bulk Button Mapping

This feature allows Office Manager's to program buttons for multiple phones at once. You'll begin with a "master" phone. Once programmed you can share the same button programming with one or more phones of the same type (i.e., ePhone3, ePhone8, etc.).

1. Choose any extension that has the type of phone you're wanting to program (i.e., ePhone3, ePhone8, etc.).
   a. In this guide, x1236 ePhone4x v2 will be our example.
2. Program the buttons on this extension like normal and Save 💾.
3. Select Bulk Button Mapping 🖼 on the right.
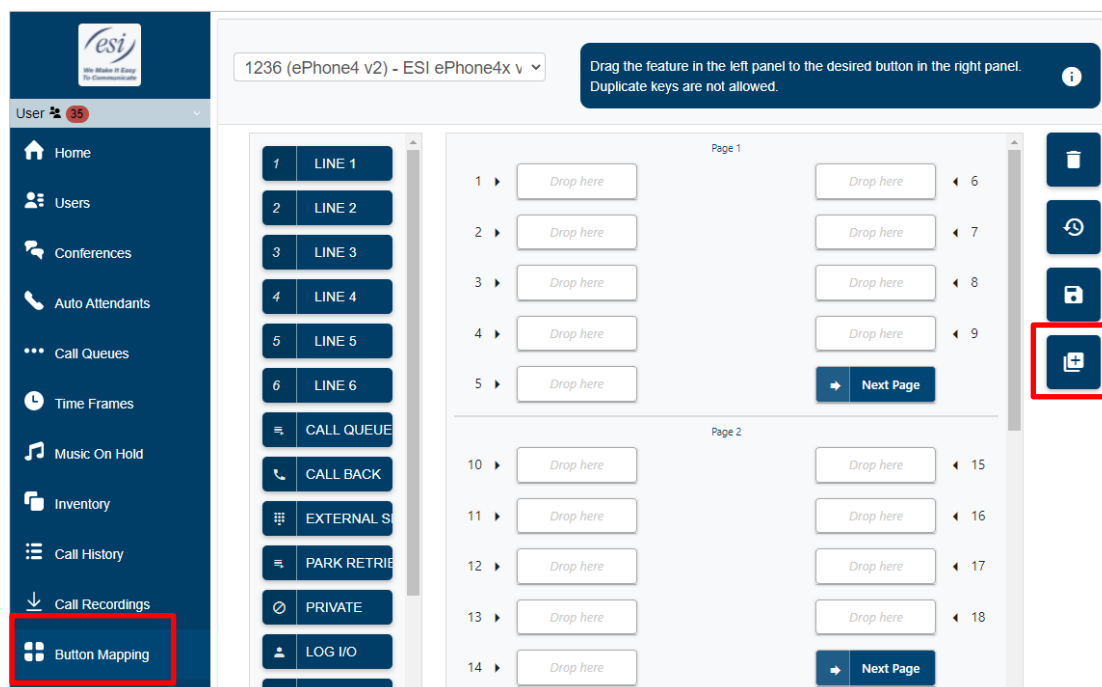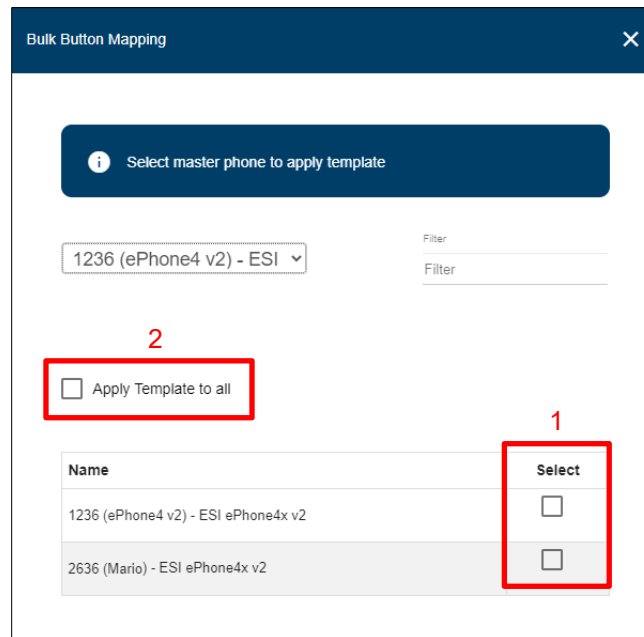
4. In the popup window select the phone that you just programmed as your Master phone.

   Notice that all ePhone4x v2s on the domain will be listed because the chosen master phone is an ePhone4x v2.
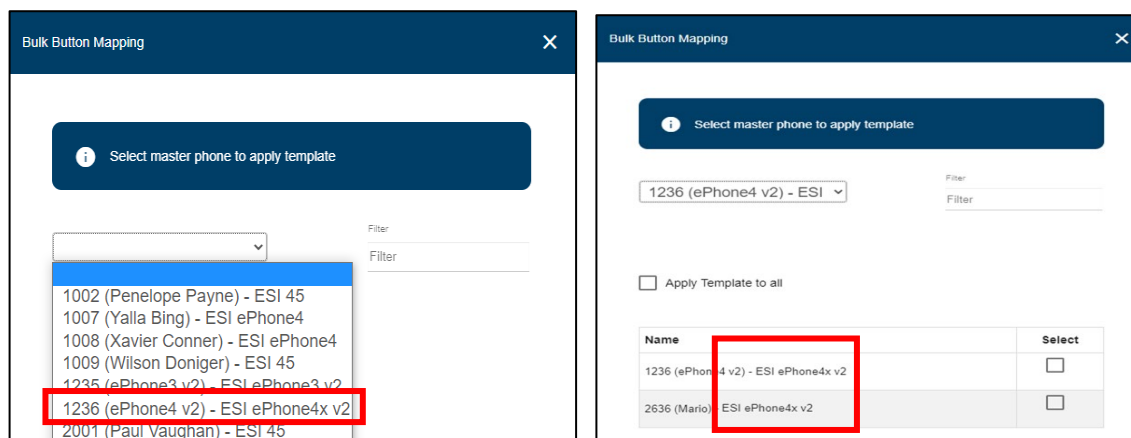
5. Choose the phones to apply the button mapping.
   a. Method 1 - Select the phones in the list to which the master button programming will be applied, then click save.
   b. Method 2. If the master button programming will be applied to all phones listed, select **Apply Template to all** and click save.

The button programming from the master phone will be sent to all selected phones.

Notify users to reboot their phones for programming to take effect.

Music-On-Hold (MOH) Management

The purpose behind custom MOH (Music-on-Hold) is that messages can be added to the currently playing audio, e.g. while a customer is on hold, the music can now be briefly interrupted with a message, such as: "Your call is important to us. Please wait on the line and an agent will be with you shortly." This is often called a "comfort message" - a message or recording that reassures the caller to not hang up. The message can be used for advertising, for updating wait time, and more, and is configurable (time between messages, copying messages, etc.).

There are four levels of music-on-hold.

- **Domain-wide** – this is the default MOH for the system. It can be used by all calls or for any user or queue when placing calls on hold or park. The Office Manager can upload new contents to become default MOH for their company. Be aware that the system, by default, provides at least three public domain (not copyright-protected) pieces of music for MOH.
- **Site-wide** - for those companies set up using SITES, each site can have its own default MOH. This is similar to the domain-wide case but affecting only one particular site.
- **User-level** – for those users that would prefer to use an MOH other than the domain-wide default, can upload new media to the platform. This new media would only be played when that particular user places an incoming call on-hold.
- **Call Queues** – affects callers waiting in a call queue. However each queue can have a different MOH. The Call Center Supervisor can manage those queues and upload new media to be played for MOH.

Warning: Your company and its users must be aware that when using copyright-protected contents, you must obtain a proper license to play it as MOH.

Domain-Level MOH

Office Manager scopes and above have access to the domain level MOH layout. By default, this table lists all users and call queues with Music-on-Hold.

Using eConsole and while at the domain level, select Music-on-Hold from the main menu.

By default, the "Hide users without Music-on-Hold" is checked on this page. Uncheck "Hide users without Music-on-Hold" to view all call queues and all users regardless of whether they have MOH or not.

By default, "hide system users" is unchecked on this page. If it is checked, then the domain system users (queues and sites) will be hidden. When a new domain is created, then the system creates a new user named domain. This user houses all default greeting files and images for the domain.

The **Domain User** is also present in this list.
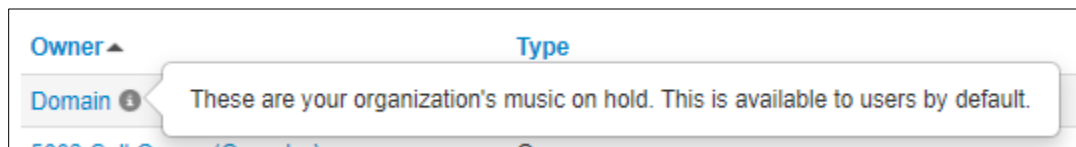
Inherit is a term that users may see in these rows to the direct left of either music or messages. This means that particular user or call queue is using music or messages that is inherited from the site or organization.
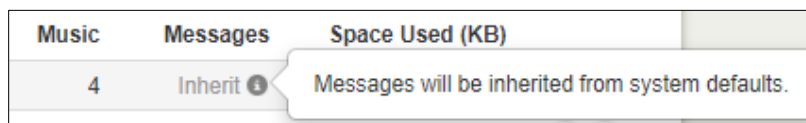
With the Edit icon, you can modify the MOH settings for any user in the list. With the red X icon, you can delete that entry in the list.
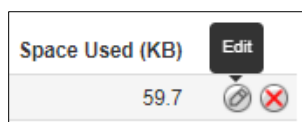
Editing MOH for the Domain

When clicking on the Edit icon for the Domain User, you can modify the MOH settings available for the entire domain. Clicking that icon opens up the "Music-on-Hold / domain" panel.

On the left hand side of this panel you have the list of MOH options. You may already have uploaded MOH files to the system, as shown in the figure below. For adding music for MOH, please refer to the Add Music to Queue section.

On the right hand side of the panel, you can add an "Introduction" message with the "Add Introduction" button, or a Comfort Message with the "Add Message" button. The Introduction message will play as soon

as a user places a caller on hold, if there is no Introduction message, then MOH will start immediately. The Comfort Message interrupts MOH at a given interval and plays that message to let the caller know that he is still on hold. The Introduction message and the Comfort message are customizable as shown below.

By default the Randomize music option is checked. If you have several pieces of music uploaded for MOH, they will play in random order when needed. Uncheck that box to play the music clips in sequential order.

Adding an Introduction Message

An introduction message plays to the caller before the caller begins to hear music.
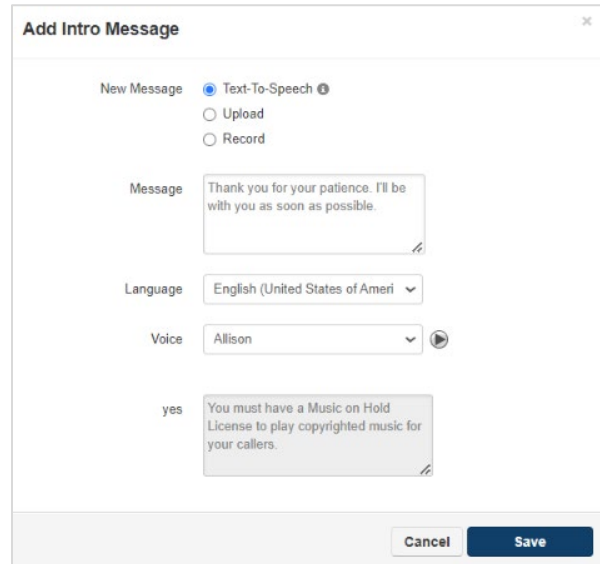
To define a new Introduction message,

1. Click on the Add Introduction button, which will present the Add Intro Message pop up window.

2. Here you can define the contents of the introductory message, using Text-to-Speech, uploading a recording from your computer, or live recording the contents of the message from your ESI phone.

   a. In the example to the right, the Text-to-Speech option is used. Type the contents of the Introduction Message, select the desired language, and then select the voice you want to use. You can hear the message by clicking the "Play" icon. Once you're satisfied with the message, click the "Save" button.

3. Once you have saved the message, it will appear in the list of messages with an indication of its duration in seconds and the size of the recording in KiloBytes (KB).

   You can only have one Introduction message.

Adding a Comfort Message

A comfort message is a message that plays during the music to give comfort and assurance to the caller that they are not forgotten or somehow lost in hold limbo.

1. Click the Add Message button, which will present a pop up window.

2. Here you can define the contents of the introductory message, using Text-to-Speech, uploading a recording from your computer, or live recording the contents of the message from your ESI phone.

   a. In the example to the right, the Text-to-Speech option is used. Type the contents of the Introduction Message, select the desired language, and then select the voice you want to use. You can hear the message by clicking the "Play" icon. Once you're satisfied with the message, click the "Save" button.

3. Once you have saved the message, it will appear in the list of messages with an indication of its duration in seconds and the size of the recording in KiloBytes (KB)

You can have multiple comfort messages and change the order in which they will play while the caller is on hold using the drag icon to the left of the message.

You should now be able to see what music, Introduction message and Comfort message(s) are available for the user.

You can copy any comfort message if you want to add it to the list by clicking on the "copy" icon to the right of the message. You can then edit its contents to modify it as you wish.
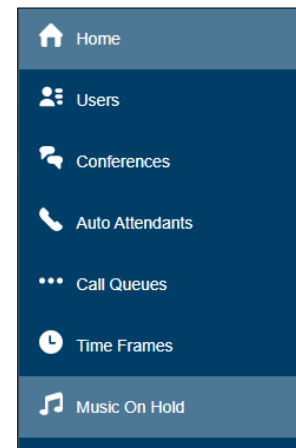
The interval at which comfort messages will interrupt the MOH and play themselves, is controlled by the slider to the left of the "Add Message button. The default value is 30 seconds.

Call Queue MOH

Office Managers have access to the domain level MOH layout. By default, this table lists all users and call queues with Music-on-Hold.

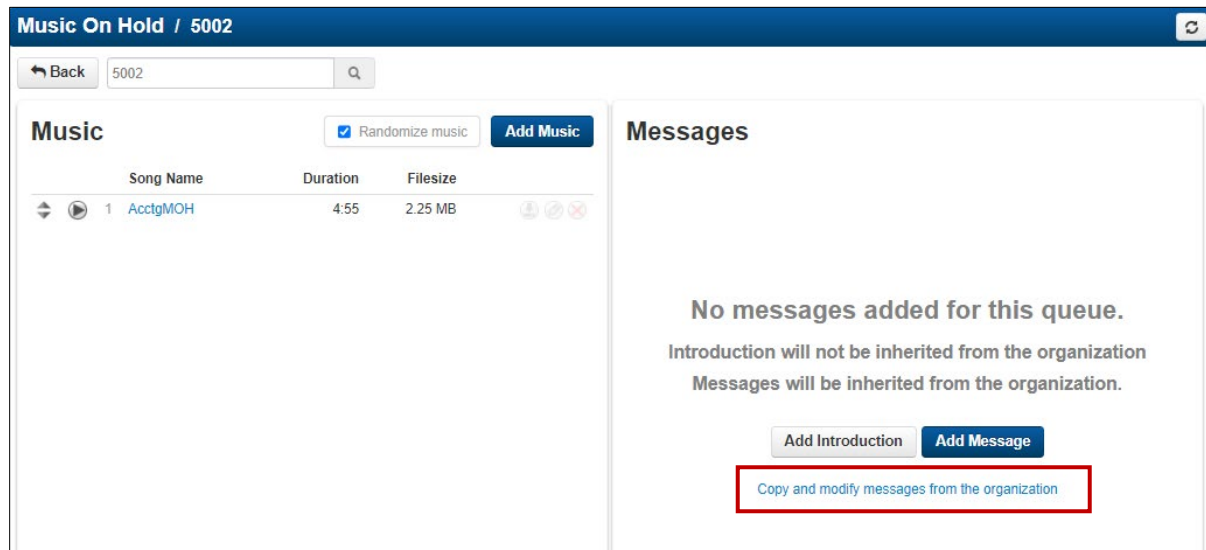Using eConsole and while at the domain level, select Music-on-Hold.

Either of the two options mentioned above, will open up the Music-on-Hold panel for the queue.

Alternatively, you can also edit MOH settings from the Call Queues tab in eConsole, by clicking on the MOH icon to the far right of the queue you want to modify MOH for.

And then click on the Edit button for the queue in the list for which you want to edit the MOH.

You may already have uploaded MOH files to the system, as shown in the figure above. For adding music for MOH, please refer to the Add Music to Queue section.

On the right hand side of the panel, you can add an "Introduction" message with the "Add Introduction" button, or a Message with the "Add Message" button. The Introduction message will play as soon as a user places a caller on hold, if there is no Introduction message, then MOH will start immediately. The Comfort Message interrupts MOH at a given interval and plays that message to let the caller know that he is still on hold. The Introduction message and the Comfort message are customizable as shown below. Alternatively, you can use the Introduction Message and Comfort message(s) defined for the domain by selecting the "Copy and modify messages from the organization" text (shown in the figure above).

Adding an Introduction Message.

Click on the Add Introduction button and Add Intro Message panel will pop-up

Here you can define the contents of the introductory message. You can do that using Text-to-Speech, Uploading a recording you have stored in your computer, or recording the contents of the message right then. In the example below, the Text-to-Speech option is used. Type the contents of the Introduction Message, select the language you have used in the test and select the voice you want to use. You can hear the message by clicking on the "Play" icon. Once you're satisfied with it, click on the "Save" button.

Once you have saved the message, it will appear in the list of messages with an indication of its duration in seconds and the size of the recording in KiloBytes (KB).
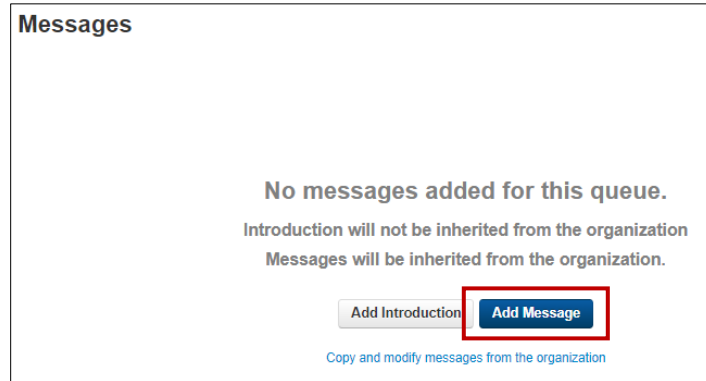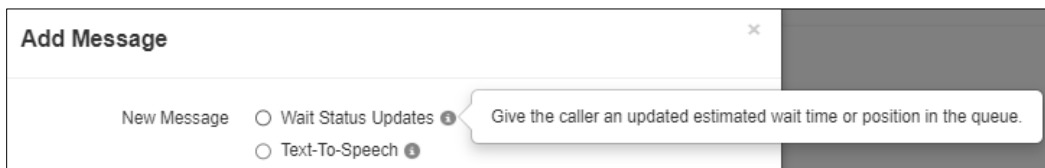

You can have only have one Introduction message.
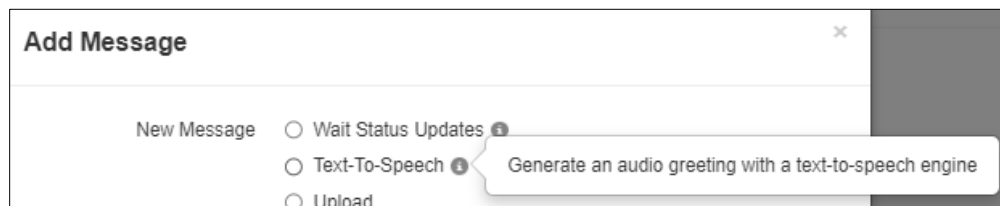
Adding a Comfort Message.

Click on the Add Message button and Add Message panel will pop-up

You will be presented with four options for creating the comfort message:

This option will generate an automatic message, informing the caller of his/her estimated waiting time and position in the queue, or

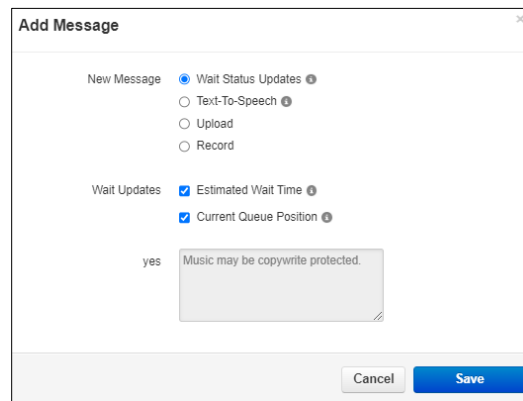This option will use Text-to-Speech to generate a comfort message.

The other two alternatives are to either upload a pre-recorded message, or record the message right then, using your phone.

0455-0357 Rev A
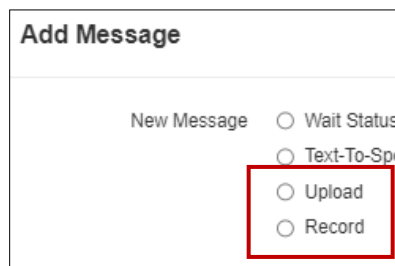
In this example we will use the first two options:

Wait Status Updates

When you select this option, a new panel will open up when you can select the estimated waiting time or the current queue position, or both. Make your selections and click on the Save button.

You will now see the recently created comfort message in the messages list:
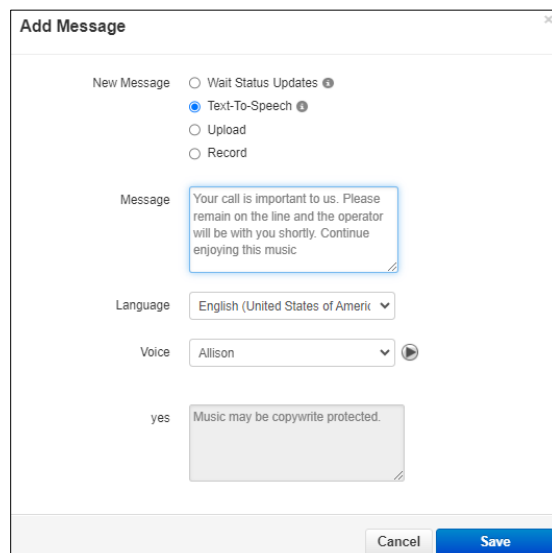
Text-to-Speech

When you select this option, the Add Message panel will open up.

Here you can define the contents of the Comfort message. You can do that using Text-to-Speech, Uploading a recording you have stored in your computer, or recording the contents of the message right then. In the example below, the Text-to-Speech option is used. Type the contents of the Comfort Message, select the language you have used in the test and select the voice you want to use. You can hear the message by clicking on the "Play" icon. Once you're satisfied with it, click on the "Save" button.

Once you have saved the message, it will appear in the list of messages with an indication of its duration in seconds and the size of the recording in KiloBytes (KB). You should now be able to see what music, Introduction message and Comfort message(s) are available for the queue:

Since you have multiple comfort messages you can change the order in which they will play while the caller is on hold using the drag icon to the left of each message.
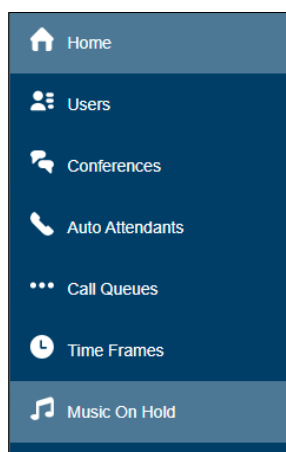
The interval at which comfort messages will interrupt the MOH and play themselves, is controlled by the slider to the left of the "Add Message button. The default value is 30 seconds.
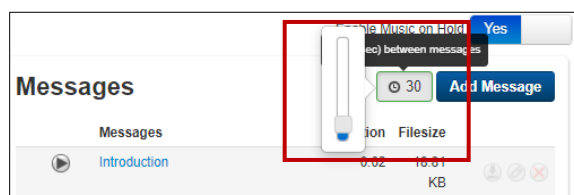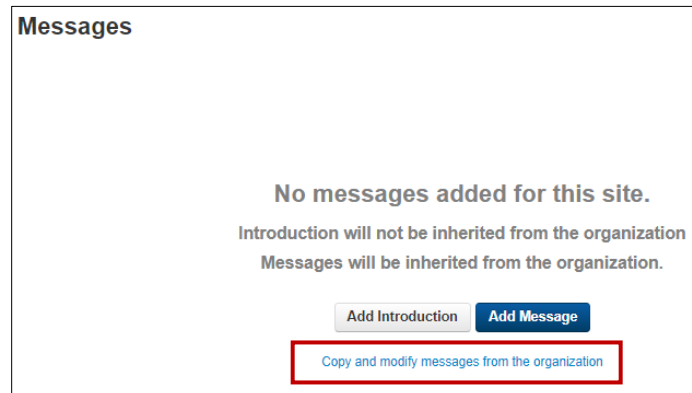

Site MOH

Office Manager scopes and above have access to the Site level MOH layout. By default, this table lists all users and call queues with Music-on-Hold.

Using eConsole and while at the domain level, select Music-on-Hold.

From the list of MOH users, find the Site for which you want to manage MOH, in this example the Site is Test 1.Click on the Edit icon to the far right of the Site name.

Alternatively, you can find the site from the Users panel, under the Sites tab and click on the MOH icon to the far right of the Site name.

Either of the two above listed methods, will open up the Music-on-Hold panel for the Site. Notice that the Site can inherit the music from the domain if no music is uploaded for it. Similarly, Introduction Message and Comfort message(s) can be inherited from the domain if nothing is defined in this panel.

In this exercise, we will add music and define an Introduction message and Comfort Message

On the left hand side of this panel you have the list of MOH options. You may already have uploaded MOH files to the system, as shown in the figure below. For adding music for MOH, please refer to the Add Music to Queue section.

Adding an Introduction Message.

If the Introduction message and comfort message(s) for the site are similar but slightly different from those defined for the domain, you can simply copy and modify those messages by clicking on the "Copy and modify messages from the organization" label.

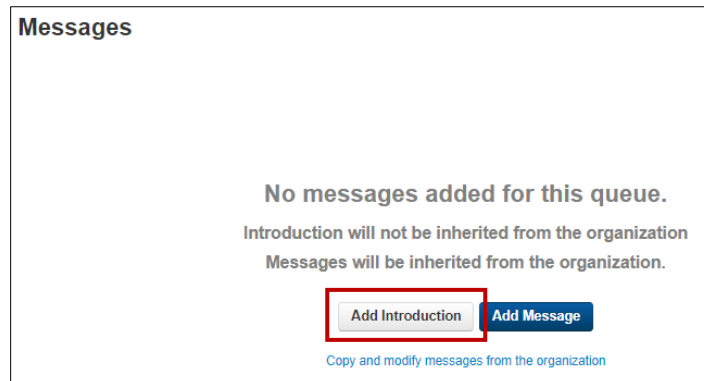To define a new Introduction messages, click on the Add Introduction button and Add Intro Message panel will pop-up.
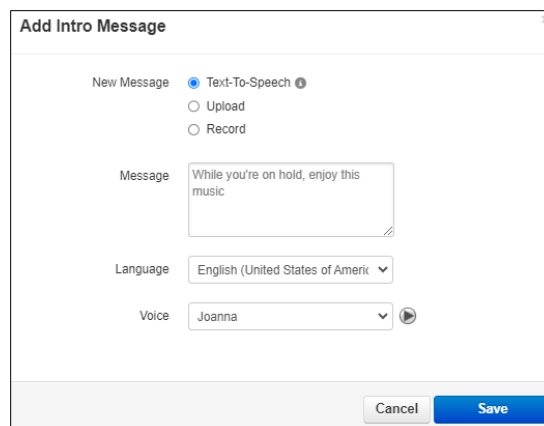

Here you can define the contents of the introductory message. You can do that using Text-to-Speech, Uploading a recording you have stored in your computer, or recording the contents of the message right then. In the example below, the Text-to-Speech option is used. Type the contents of the Introduction Message, select the language you have used in the test and select the voice you want to use. You can hear the message by clicking on the "Play" icon. Once you're satisfied with it, click on the "Save" button.
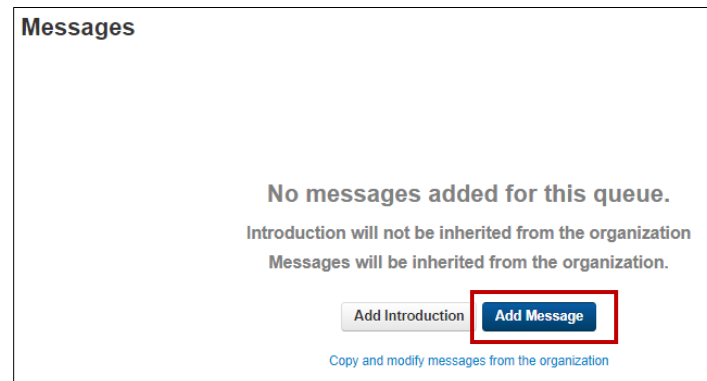
Once you have saved the message, it will appear in the list of messages with an indication of its duration in seconds and the size of the recording in KiloBytes (KB).
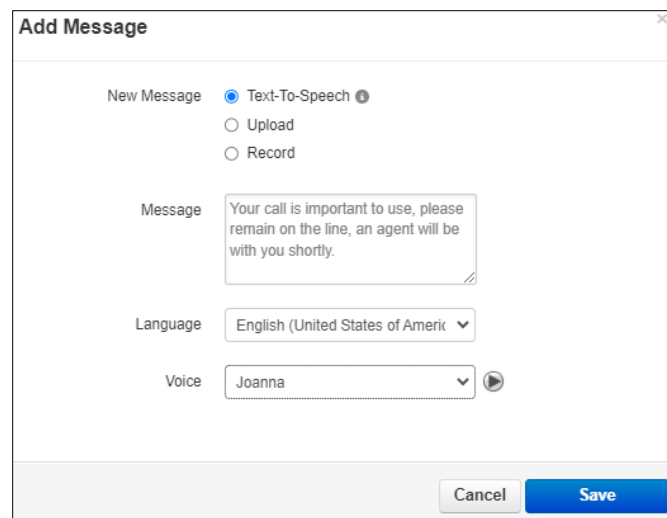

You can have only have one Introduction message.

Adding a Comfort Message.

Click on the Add Message button and Add Message panel will pop-up

Here you can define the contents of the Comfort message. You can do that using Text-to-Speech, Uploading a recording you have stored in your computer, or recording the contents of the message right then. In the example below, the Text-to-Speech option is used. Type the contents of the Comfort Message, select the language you have used in the test and select the voice you want to use. You can hear the message by clicking on the "Play" icon. Once you're satisfied with it, click on the "Save" button.

Once you have saved the message, it will appear in the list of messages with an indication of its duration in seconds and the size of the recording in KiloBytes (KB).

You can have multiple comfort messages and change the order in which they will play while the caller is on hold using the drag icon to the left of the message.

You should now be able to see what music, Introduction message and Comfort message(s) are available for the Site.

Call Recording Transcription and Sentiment Analysis

Call Recording Transcription is the conversion of the audio in a recording into plain text. The conversion is done once the recording is complete and so, the transcription may take a few minutes to be available, depending on the duration of the call. Sentiment Analysis is a powerful add-on feature that interprets the transcribed text of a call recording into qualitative terms (the text was neutral, positive, or negative) and then quantifies it throughout the transcript (for example: 2-neutral segments, 3-positive, 1-negative).

Call recording transcription is available through the Call History tab of eConsole. If call recording has been configured, the speaker icon ("listen") in a call's row will be clickable. If **Call Recording Transcription** has not been configured, then the call recording will display as an audio player only.

Enabling the feature

Call Recording with Transcription and Sentiment Analysis can be enabled at:
- The Queue level by the Call Center Supervisor (left screenshot below) or,
- At the User/Agent level by the Office Manager (right screenshot below)

Thus, maximum flexibility on how to use these powerful resources.

As you can see from the screenshots above, there are four selectable options for Call Recording.
- **Yes** – Enables audio recording only
- **Yes w/Transcription** – Enables audio recording plus call transcription.
- **Yes w/Transcription and sentiment analysis** – Enables audio recording, call transcription and the sentiment analysis of the transcription.
- **No** – Disables call recording.

If **Call Recording Transcription** has been configured, then the **Call Transcript** pop-up window will display on screen with color-coded segments of speech by speaker. The recording text can be filtered by speaker. The audio progress bar can be scrubbed to skip to any point in the call. The full transcript can be downloaded as a .csv file ("download transcript").

With Sentiment Analysis, Call Recording Transcription has more features to display, in addition to the features explained above. In the **Call Transcript** pop-up window, the sentiment data attempts to quantify overall mood from the text itself by using colors to illustrate the various segments. Both the audio progress bar and text are separated into the color of the corresponding sentiment. As the sentiment analysis is only analyzing text, it cannot detect audio tone or context and therefore will miss inflections. For example, it cannot pick up on people speaking sarcastically.

Viewing the call transcription and sentiment analysis for a call

To view the call transcription (and sentiment analysis, if applicable) for a given call for a user, the Office Manager should go to the call history tab in the eConsole and click on the speaker icon ("listen") to the far right of the call for the subscriber for whom the feature has been enabled.

A panel will appear (as shown below) with the full transcription of the call and the sentiment analysis for it (if enabled). The audio recording of the call can be played as usual and the transcription and sentiment analysis panels will advance accordingly. The different segments of the call will be highlighted according to the sentiments color settings displayed in the panel.