



ESI eSIP Evolution Series

ESI Communicator User's Guide

This document provides instruction for installing and using ESI Communicator, a Windows desktop application for eSIP Evolution users.

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Introduction

ESI Communicator is a PC application for the eSIP Evolution Series of phone systems (eSIP 50x, eSIP 200x, eSIP 500x, eSIP TITAN 1000, and eSIP TITAN 2000; eSIP 20x not supported) that enhances user productivity by bridging the gap between phone and PC.

Features

- Telephone Call Control via PC
- Click to Call
- Contact Management
- Visual Voicemail Management
- Intra-office Chat

System Requirements

In order to ensure a successful installation, please make sure your ESI phone system meets the following requirements.

- ESI eSIP Evolution Series: eSIP 50x, eSIP 200x, eSIP 500x, eSIP TITAN 1000, and eSIP TITAN 2000 (eSIP 20x not supported)
- Call Processing software: all releases

Note that ESI Communicator is NOT compatible with the eSIP 20x phone system.

The following ESI phones are currently supported:

- ESI ePhone3
- ESI ePhone 4x
- ESI ePhoneX

Do not attempt to use ESI Communicator with any other phone models.

PC Requirements

The following are the minimum PC requirements in order to install and run ESI Communicator:

| | Windows Operating Systems | | | PC Hardware | | | |
|-------------------------|---------------------------|-----------------|--------------------|-----------------------------|-----|------------------|-----|
| | Win 10 Pro | Win 8, 8.1 Pro | Win 7 Pro | Processor | RAM | Free HDD Space | LAN |
| ESI Communicator | Yes (64-bit) | Yes (64-bit) | Yes (32/64-bit) | Intel i3 (or equivalent) | 2GB | 2GB (minimum) | YES |

ESI Communicator is also compatible with a Microsoft Remote Desktop Services (Terminal Services) environment. In this case, the operating system should be Windows Server 2008 R2 SP1 or above.

Other Requirements

In addition to ESI Communicator being installed on the PC, there must be a single installation of ESI Application Server installed on a PC on the Local Area Network (LAN) where the phone system is located, regardless of the number of PCs on which ESI Communicator is installed. ESI Application Server may be sold **with** ESI Communicator but it still requires a separate license activation.

Pre-Installation Checklist

Before attempting to install ESI Communicator, please ensure that there is one, and only one, installation of ESI Application Server present and configured on the Local Area Network (LAN) where the phone system resides. For installation and configuration instructions, please refer to the separate document, "ESI Application Server Administration Guide".

Before installing ESI Communicator, perform the following steps on the PC where ESI Communicator is to be installed:


Update your PC with all recommended Microsoft Windows updates. You can begin this process by going to www.microsoftupdate.com.



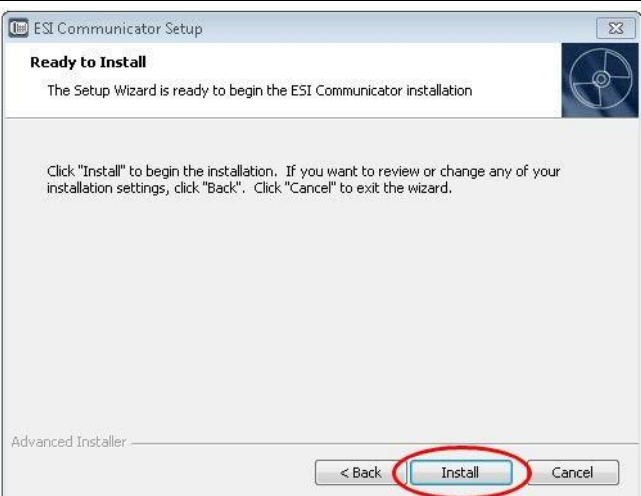
Ensure that you have Administrator privileges on the local PC where you will install the software.


As of this writing, the latest version of ESI Communicator can be obtained from the ESI Academy web site by authorized ESI resellers.

After extracting all the files in the installation archive to their own folder, double-click on the file "Setup.exe" to launch it.

Note: If there are any additional Microsoft components that need to be present on your PC in order for ESI Communicator to run correctly, you will be prompted to install them. If you are, please allow those components to be downloaded and installed (for example, the Microsoft .NET Framework 4.5, or the Visual C++ Redistributable).

| Setup Screen | Steps |
|--|---|
|  | <p>After any prerequisites are installed on the PC, you will see the following screen: Click on the "Next" button to proceed. The following screen shows:</p> |

| Setup Screen | Steps |
|---|--|
|  | <ol style="list-style-type: none"> 1. This is the End User License Agreement for the ESI Communicator software. Please read through it carefully to ensure that you agree with the terms of your use of this software. 2. Once completed, select the "I accept the terms" selection then click the "Next" button to proceed with the installation. Next, you will be asked to specify where you would like ESI Communicator to be installed: |
|  | <ol style="list-style-type: none"> 3. You may choose the default location and click the "Next" button. |
|  | <ol style="list-style-type: none"> 4. On the following screen, click "Install" to begin the installation: |

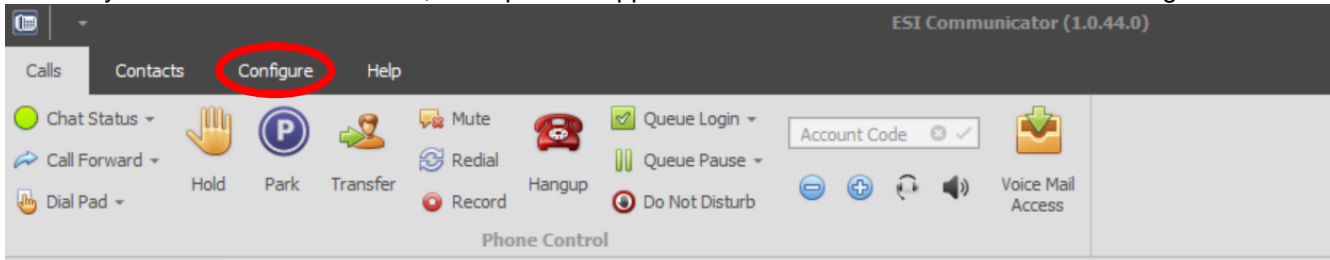
| Setup Screen | Steps |
|---|---|
|  | <p>5. After a few moments, the installation will complete, and you will see the following screen:</p> <p>6. Click "Finish". The installation is complete!</p> |

Configuration

Accessing Settings

To access the Settings screens of ESI Communicator, you must first launch the application. You can do this either by double-clicking on the desktop icon, or you can locate it by clicking on the Windows Start button and locating and clicking on the shortcut to the application.

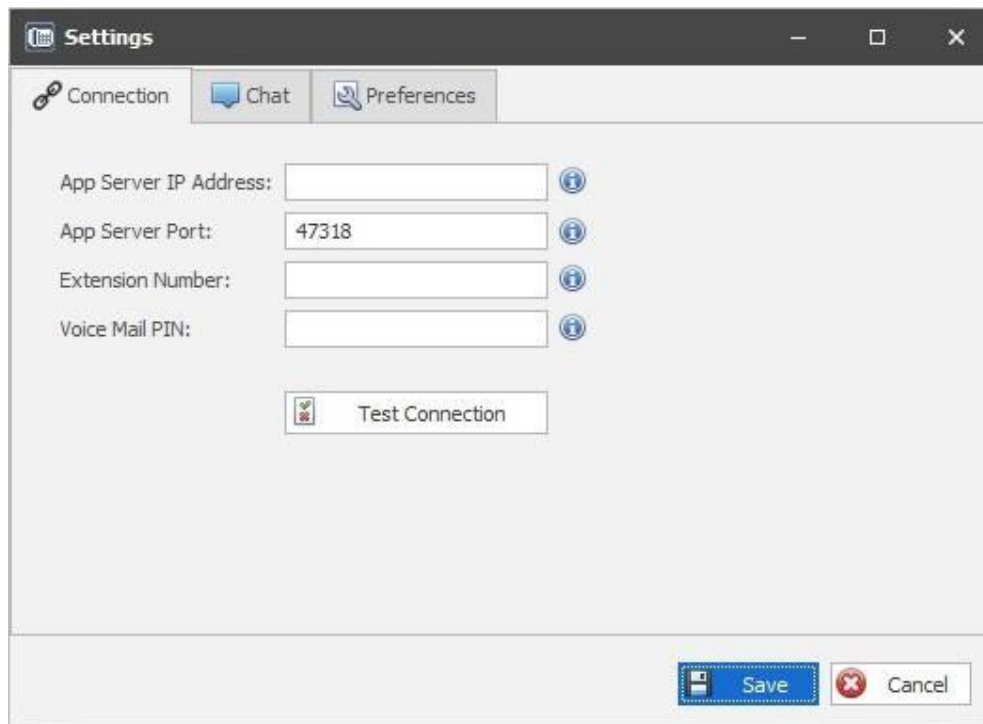
When you run ESI Communicator, the top of the application window will be similar to the following:



Click on the "Configure" tab near the top of the application window, and you will see the ribbon bar change to the following:



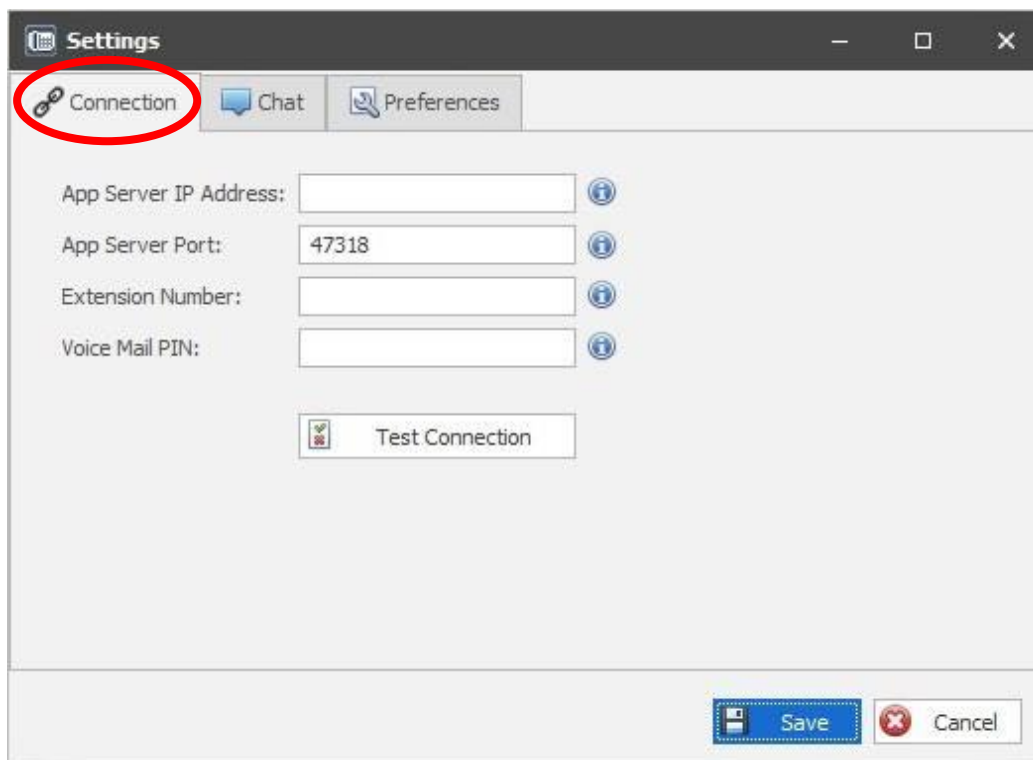
Here, you can either choose an option from the "Skins" section of the ribbon bar (in which case you can change the visual appearance of the application to suit your taste), or you can click on the "Settings" button to access all of the other program settings:



By clicking on a specific tab in the Settings window, you can access and change the settings for that section. In the following help sections, each settings tab will be covered in detail.

Connection Settings

The Connection settings tab appears as follows:



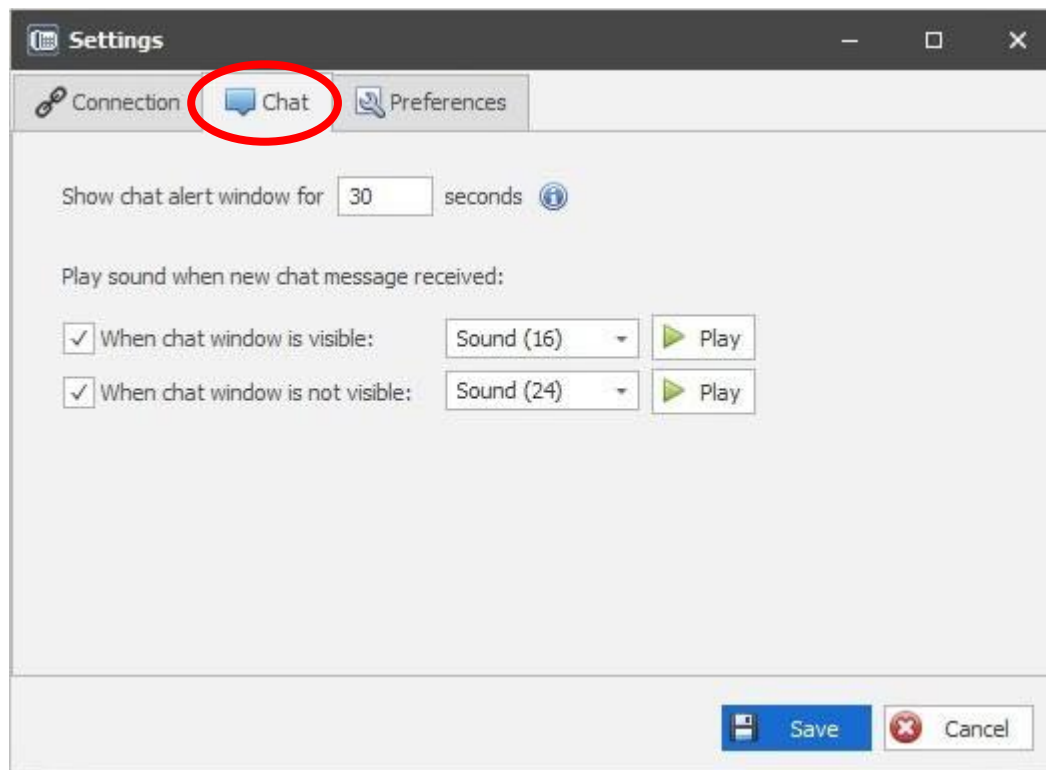
In this section, you will specify the connection settings to communicate with ESI Application Server (licensed separately). **ESI Application Server should already have been installed and configured on the same LAN where the phone system is located.**

The following settings are entered in this section:

| Item | Description |
|-----------------------|---|
| App Server IP Address | The IP address of the PC on which ESI Application Server is installed. If ESI Communicator is running on the same PC as ESI Application Server (for example, in a Remote Desktop Services/Terminal Server environment), you may use 127.0.0.1 as the IP address. If you are running ESI Communicator remotely (i.e., not on the same LAN as ESI Application Server), you should enter the public IP address associated with where ESI Application Server is installed. In this case, make sure that you have forwarded the ports in your router/firewall correctly, as outlined in the ESI Application Server Administration Guide. |
| App Server Port | The UDP port we will use to communicate with ESI Application Server. By default, this is port 47318. |
| Extension Number | The user's extension number on the phone system. |
| Voice Mail PIN | The user's voice mail password (PIN) used in order to retrieve messages. |

Chat Settings

The Chat Settings tab appears as follows:

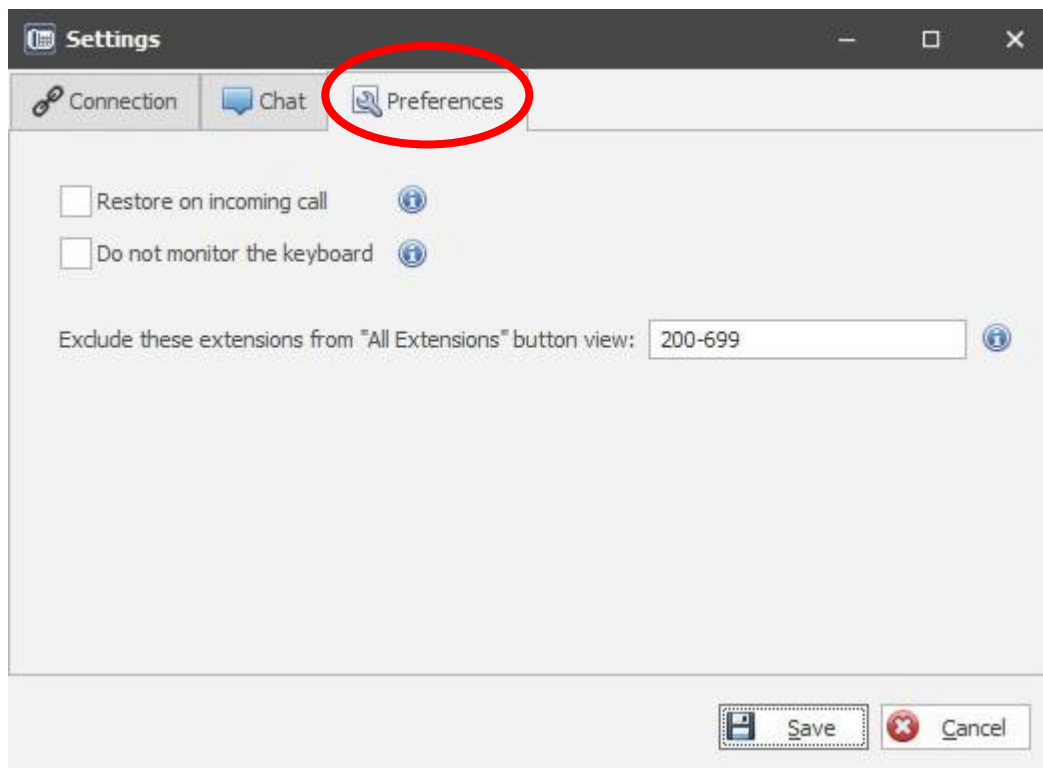


In this section, there are some options available to you regarding the chat functionality of ESI Communicator. The following settings are entered in this section:

| Item | Description |
|------------------------------------|--|
| Show chat alert window for seconds | If the ESI Communicator is minimized and you receive a chat message from another ESI Communicator user, a small alert window will appear on screen, indicating that you have received a chat message. The number you enter here is the length of time, in seconds, that the alert window will show before disappearing. Note: clicking on the alert window will also dismiss it. |
| When chat window is visible | When you receive a new chat message, and the chat window is visible, the selected sound will play. You may also uncheck the box if you do not wish for a sound to play in this scenario. |
| When chat window is not visible | When you receive a new chat message, and the chat window is not visible (either because you are chatting with a different individual, or because the ESI Communicator window is minimized), the selected sound will play. You may also uncheck the box if you do not wish for a sound to play in this scenario. |

Preferences Settings

The Preferences tab appears as follows:



In this section, there are multiple options. Below is a description of each:

| Option | Description |
|---|--|
| Restore on incoming call | When this box is selected, upon receiving an incoming call the main application window will be restored and appear in front of other windows. |
| Do not monitor the keyboard | This option is in regard to ESI Communicator's "Click to Call" functionality. When this box is selected, the keyboard will not be monitored, which means that automatically dialing a phone number (by highlighting the number, and then pressing Ctrl-C twice) will not function. |
| Exclude these extensions from "All Extensions" button view: | By default, all extensions on the eSIP phone system will appear in the Extensions view of <i>ESI Communicator</i> . If you would like to exclude one or more extensions from this view, you may enter the extension number(s) here. Note that extension entry is flexible, so that you can separate extension numbers by commas (1010, 1017, 1115), use ranges (such as 1100-1108), or both (such as 1010, 1017, 1100-1108, 1115). |

Using ESI Communicator

Call Control






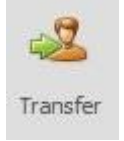


The primary function of ESI Communicator is Call Control; that is, the manipulation of calls interacting with your desk phone. There are several aspects to call control in ESI Communicator. The following sections will help you get the most out of your experience.












Call Control Ribbon

The Call Control Ribbon is at the heart of ESI Communicator's ability to give you access to controlling your desk phone, and an interface with which you will be interacting regularly. The Call Control Ribbon looks like the following:





Each of the items on the ribbon bar are explained below:

| Item | Description |
|--|--|
|  Chat Status ▾ | Allows you to set your Chat Status and provides an indicator to other personnel of your Presence/availability. For more information, refer to the section, " Chat Status ". |
|  Call Forward ▾ | Allows you to set the Call Forwarding status on your phone (Always, Busy, and/or No Answer). For more information, refer to the section, " Call Forwarding ". |
|  Dial Pad ▾ | The Dial Pad allows you to initiate a phone call, as well as to dial digits after a call has been established. For more information, refer to the section, " Using the Dial Pad ". |
|  Hold | Places a call in progress on hold or picks up a call from hold if you have a single held call. Note that when you place a call on hold, it is accessible from your phone only. In order to place a call on hold so that it can be retrieved from other phones, you should park the call instead. |
|  Park | Places a call in progress on park. This allows it to be picked up by either your phone, or another phone on the system. |
|  Transfer | Initiates the transfer of a live call. You will be prompted for the destination. |
|  Mute | Places your phone into mute. The party with whom you are connected will not hear any audio from your phone. |
|  Redial | Redials the most recently-dialed number at your phone. |






| Item | Description |
|---|---|
|  Record | Initiates recording of a call. If clicked a second time, the call recording will be turned off. Note that calls recorded via this method will be available to you via your web login on the phone system. |
|  Hangup | Disconnects your currently-connected call. |
|  Queue Login ▾ | Allows you to log into or out of one or more queues in the phone system. Refer to the section, " Call Queuing " for more information. |
|  Queue Pause ▾ | Allows you to pause yourself in one or more queues (in which case you will be temporarily considered unavailable to answer calls from the queue), or un-pause yourself (in which case you will again be considered available to receive calls from the queue). Refer to the section, " Call Queuing " for more information. |
|  Do Not Disturb | Places your phone into Do Not Disturb so that no inbound calls will be received at your phone. Typically, calls will forward to your voice mail box instead, but this depends upon your call forwarding settings. Clicking this button, a second time will remove your phone from Do Not Disturb status. |
| Account Code  | Allows you to enter a non-forced account code for the current live call. Refer to the section, "Non-Forced Account Codes" for more information. |
|  | Increases the phone volume. The volume adjusted depends upon what state your phone is in: Idle (in which case the ringing volume is adjusted), or on Speakerphone, your Handset, or your Headset (in which case the speakerphone, handset, or headset volume will be adjusted, respectively). |
|  | Decreases the phone volume. The volume adjusted depends upon what state your phone is in: Idle (in which case the ringing volume is adjusted), or on Speakerphone, your Handset, or your Headset (in which case the speakerphone, handset, or headset volume will be adjusted, respectively). |
|  | Activates the Headset button on the phone. |
|  | Activates the Speaker button on the phone. |
|  Voice Mail Access | Allows you to access your voice mail box on the phone system. If you have any new voice mail messages, a "badge" will show on this button reflecting the number of messages (in the case of this example, the user has 1 new voice mail message). |

My Calls

The "My Calls" region of ESI Communicator is designed to display all of your phone's calls that are currently in progress. This includes both calls in which you are actively engaged, as well as calls that you have placed on hold. The "My Calls" region appears as follows:

| My Calls | | | | | |
|---|---|----------|--------------|----------------|-----------|
| | | Duration | Name | Number | Direction |
| |  | 00:01:09 | AWESOME JAMZ | (972) 555-6425 | In |
|  |  | 00:00:43 | OUTBOUND | (972) 555-9999 | Out |

In the example above, there are two calls in progress: one call is on hold (in yellow), and the other call is active (in green). In each case, you see information about the call, such as the Caller ID (when available) and duration of the call. There are also small icons that you can click on for each call in order to control the call. These are contextual, meaning that the icons that are available to you will differ depending on the state of the call. Below is an explanation of each column or icon:

| Item | Description |
|--|--|
|  | Allows a ringing call to be answered. Allows a held call to be retrieved (picked back up). |
|  | Rejects an incoming ringing call. Typically, the call will go to voice mail, but it depends upon how the phone's Call Forwarding is set up. |
|  | Performs a blind transfer to the designated destination. You will be prompted for the destination. |
|  | Causes a call to be parked. When a call is parked, either you or another phone user on the system can retrieve the call. Note that, when you park the call, the call information will move from the "Live Calls" region of the application to the "Parked Calls" region of the application. |
|  | Disconnects a call. |
| Duration | The duration of the call leg, expressed as HH:MM:SS, where HH is the number of hours the call has been in progress, MM is the number of minutes, and SS is the number of seconds. Note that the duration displayed will depend upon how long the call has been in that state. For example, while a call is ringing, the ring duration will show; when a call is in progress, the duration of the live portion of the call will be displayed; and when a call has been placed on hold, the hold duration will be displayed. |
| Name | For an inbound call, the Caller ID Name (when available from the dial tone carrier), or if it is a station-to-station (internal) call, the name of the station calling; for an outbound call, "OUTBOUND". |
| Number | For an inbound call, the Caller ID Number (when available from the dial tone carrier), or if it is a station-to-station (internal) call, the number of the station calling; for an outbound call, the number dialed. |
| Direction | "In" for an inbound call, or "Out" for an outbound call. |

Row Color Meanings

The color of any particular row corresponding to a call in the "My Calls" region will vary and is based upon the state of the call:



| Color | Description |
|------------|---------------------------------------|
| (Blinking) | The call is ringing at the phone. |
| | The call is in progress on the phone. |
| | The call is on hold on the phone. |

When a call is on hold, the "Duration" cell of the call row will additionally change color depending upon the length of time the call has been held. For calls held between 1 and 2 minutes, it will be colored yellow bold. For calls held longer than 2 minutes, it will be red bold. This is simply to attract your attention so that callers on hold are attended to in a timely manner.



Parked Calls

The "Parked Calls" region of ESI Communicator is designed to display all calls in the phone system that have been placed in park, whether parked by you or by another user of the phone system. Calls that have been placed in park can be retrieved by any phone user on the phone system. The "Parked Calls" region appears as follows:

Parked Calls

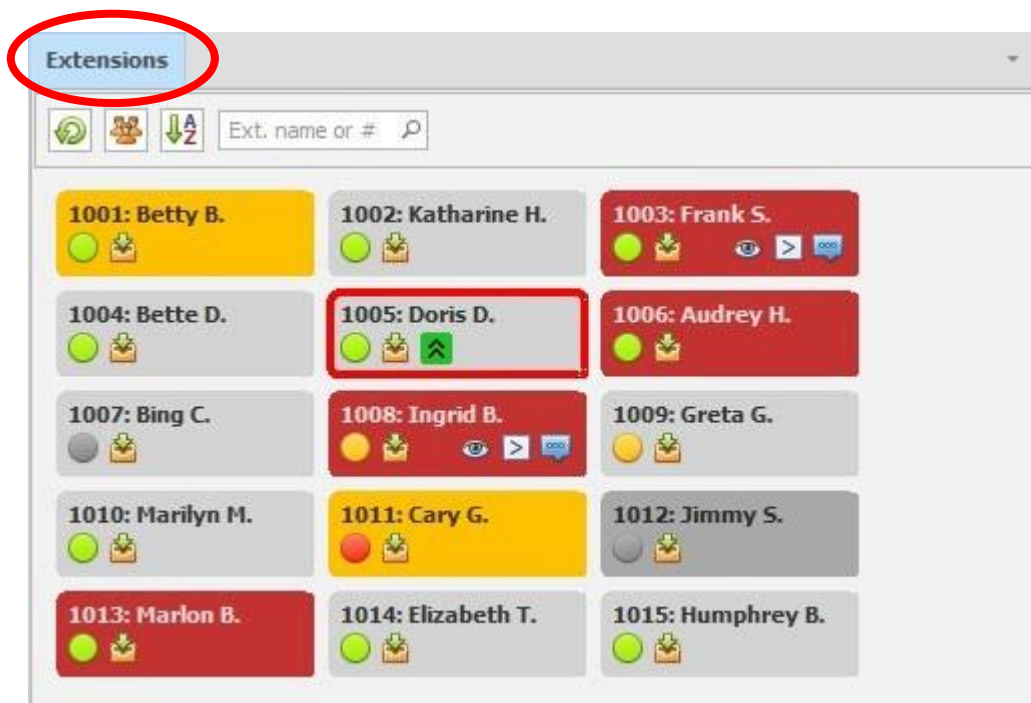
| | Orbit | Park Time | Name | Number | Parked By |
|---|-------|-----------|-----------|------------|-----------|
|   | 10 | 00:00:14 | <unknown> | 9497709410 | 2169 |

In the example above, there is one parked call represented. In each case, you see information about the call, such as the Caller ID (when available) and duration that the call has been parked. There are also small icons that you can click on for each call in order to control the call. Below is an explanation of each column or icon:

| Item | Description |
|---|--|
|  | Allows a parked call to be retrieved. |
|  | Performs a blind transfer of the call to the designated destination. You will be prompted for the destination. |
| Orbit | The parking extension number associated with the parked call. Any phone user on the system can retrieve the parked call by dialing this number. |
| Park Time | The duration that the call has been parked, expressed as HH:MM:SS, where HH is the number of hours the call has been parked, MM is the number of minutes, and SS is the number of seconds. Note that if a call has been parked for longer than 1 minute, the cell for this call will be colored yellow bold, and if it has been parked for longer than 2 minutes, it will be colored red bold. This is simply to attract attention so that callers are attended to in a timely manner. |
| Name | For an inbound call, the Caller ID Name (when available from the dial tone carrier), or if it is a station-to-station (internal) call, the name of the station calling; for an outbound call, "OUTBOUND". |
| Number | For an inbound call, the Caller ID Number (when available from the dial tone carrier), or if it is a station-to-station (internal) call, the number of the station calling; for an outbound call, the number dialed. |
| Parked By | The extension number of the station that parked the call. |

Extensions

The "Extensions" region of ESI Communicator is designed to display a "virtual" button, or representation, of each extension on the phone system, along with its current status and the ability to interact with that extension. Each IP device (such as a phone or paging device) is represented here, as well as any FXS (analog) stations. The "Extensions" region looks similar to the following:



In the example above, there are 15 extensions represented. On each button, you can see that both the extension number and name are shown at the top of the button in order to identify the extension.

Extension Button Background

Depending on what color the extension button is, and which icons within the button are available, you can determine the state of that extension as well as the ways in which you are allowed to interact with it.

The background color of the extension button may be one of the following:








| Color | Description |
|-------|-------------------------------------|
| | The extension is idle. |
| | The extension is in use. |
| | The extension has a call on hold. |
| | The extension is in Do Not Disturb. |
| | The extension is offline. |

If the extension corresponding to a button is ringing, it will be outlined in (flashing) red, like so:



Extension Button Icons

The icons that are available at any given time at the bottom of the extension button will vary based upon the extension's state as well as what features have been enabled on the extension. The available icons will be one or more of the following:

| Item | Description |
|---|--|
|  | The extension has chat capability via ESI Communicator and is available for a chat conversation. Simply click on this icon to initiate a chat conversation with the user. |
|  | The extension has chat capability, but the user's status is "Away", and you cannot initiate a chat conversation. |
|  | The extension has chat capability, but user's status is "Busy". You may still initiate a chat with this user, but the user may be slow to respond, depending upon their workload, and may prefer not to be bothered except with urgent matters. |
|  | The extension does not have chat capability, either because they do not have ESI Communicator, or ESI Communicator is not running on their PC. |
|  | Voice Mail. If your phone is idle and you click this icon, it will initiate a call from your phone to the extension user's voice mail box so that you can leave a message. If a call on your phone is in progress, that call will be transferred to the extension user's voice mail box. |
|  | Call Pickup. If the associated extension is ringing, you may click this button to retrieve the ringing call to your phone and answer it. |
|  | Call Monitor. This allows you to monitor the audio of a call taking place on the associated extension. Neither the extension user nor the outside party will have an indication that you are listening. In order for this feature to be available, the target extension must be on an outside call, their extension settings in the phone system programming must be set to "Allow Being Monitored", and your own extension's "Monitor Mode" setting in the phone system programming must be set to either "Listen" or "Extensive". |
|  | Call Barge. This allows you to "barge in" on a call taking place on the associated extension, so that all parties are conferenced together. All parties will be able to hear, and be heard by, each other. In order for this feature to be available, the target extension must be on an outside call, their extension settings in the phone system programming must be set to "Allow Being Monitored", and your own extension's "Monitor Mode" setting in the phone system programming must be set to either "Barge-in" or "Extensive". |
|  | Call Whisper. This allows you to "whisper" on a call taking place on the associated extension. In this scenario: (1) you will be able to hear both of the other parties; (2) the target extension will be able to hear you; and (3) the outside party will not be able to hear you. In order for this feature to be available, the target extension must be on an outside call, their extension settings in the phone system programming must be set to "Allow Being Monitored", and your own extension's "Monitor Mode" setting in the phone system programming must be set to either "Whisper" or "Extensive". |

When another extension has a call in progress, you can hover over their corresponding extension button, and a tooltip will appear showing the length of time that they have been on their call. If you have monitoring privileges for this extension (see "Call Monitor", Call Barge", and "Call Whisper" above), the tooltip will also show the Caller ID of the call, if available.

Drag and Drop Operation

The extension buttons within the "Extensions" region of ESI Communicator support "drag and drop" functionality; in other words, you may transfer a call from the "My Calls" and/or "Parked Calls" region of ESI Communicator to an extension button in order to perform a blind transfer of the call. Any call involving an external party (i.e., not a user of your phone system) may be transferred, regardless of whether the call is ringing, in progress, on hold, or parked.

You may also drag and drop a voice mail message from the "Voice Mail" visual region of *ESI Communicator* to an extension button in order to quickly copy or move the message to the target extension's mailbox. After dragging and dropping a message, a window will appear allowing you to specify whether the message is to be copied or moved, and additionally allowing you to record an optional prefix audio message:







Sort, Filter and Search

The Sort, Filter and Search toolbar appears as follows:



This toolbar features the following functionality:

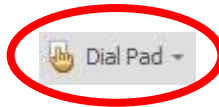
| Item | Description |
|---|---|
|  | Resets all sorting and filtering of extensions, so that all extensions will appear, sorted by extension number. |
|  | Allows the user to filter extensions based on any particular queue programmed in the phone system. |
|  | Allows the user to sort extensions based on extension number, first name, or last name in either ascending or descending order. |
|  | Allows the user to filter extensions based on full or partial extension name or number. |

Initiating a Call

There are multiple ways in ESI Communicator that a call can be initiated. Each of these is explained below.

Using the Dial Pad

A phone number may be manually dialed via the Dial Pad. To access the Dial Pad, click on the following button in the ribbon bar at the top of the ESI Communicator application window:



When you click this button, the Dial Pad will appear:



There are two ways to initiate a call from the Dial Pad. The first is to click on each button corresponding to the digits in the phone number that you would like to dial. You can then either click the # button, or press the Enter key on your keyboard, to initiate the call. The second way to initiate a call from the Dial Pad is to dial the digits of the phone number on your keyboard, and press Enter when done.

Dialing Contacts

For each contact that you create or import, you can specify a Business, Mobile, and/or Home number for each contact (see the [Contact Management](#) section of this help guide for more details). Each contact for which a Business, Mobile, or Home phone number has been entered will have a corresponding icon visible in the Contacts visual region of ESI Communicator. You may initiate a call to this contact simply by clicking the corresponding icon.

Returning A Call From Voicemail

Thanks to the Visual Voicemail functionality of *ESI Communicator*, you may view the Caller ID (where available) of any voice mail message to which you have access. By clicking the miniature, green phone handset icon on the voice mail message row, you may call the originator of the message back. For more information on Visual Voicemail, refer to the topic, "Visual Voicemail Management".

Highlight and Dial

You may dial a phone number from practically anywhere in Windows by highlighting the phone number and then pressing Ctrl-C twice (holding down Ctrl and pressing C twice). As long as the phone number can be copied to the Windows Clipboard, this functionality should work, regardless of what application you are in. The phone number does not need to be in any particular format, as ESI Communicator recognizes phone numbers entered in a wide variety of formats. Note that the phone number does not need to be highlighted perfectly for this feature to work; as long as you have highlighted the complete phone number, it will not matter if there are a few characters or spaces highlighted before or after the phone number.

Click to Call

ESI Communicator features "Click to Call" functionality, meaning that phone numbers can, in certain cases, be automatically dialed by clicking on a phone number that has been converted into a hyperlink. This functionality is available in two areas:

- The Google Chrome or Mozilla Firefox web browser.

- A third-party extension must be installed in Chrome or Firefox for this to work. At the time of this writing, it can be obtained by visiting one of the following links:
 - <https://chrome.google.com/webstore/detail/telephone-number-detectio/oolkfddhhccdcigijagahblnlkgjki?hl=en>
 - <https://addons.mozilla.org/en-US/firefox/addon/telephone-number-detection/>

Any phone numbers entered into a Chat window of ESI Communicator will automatically be converted into a hyperlink, allowing for one-click dialing.

Note: ESI Communicator does not feature inbound "screen pop" ability for automatic lookup of customer records in a database. If this functionality is required, the separate product ESI Click to Call is needed (licensed separately). ESI Communicator and ESI Click to Call can coexist on the same PC without conflict.

Call Forwarding

An ESI Communicator user can easily set his or her phone to forward calls in the following conditions:

- When the phone is busy,
- When the phone is not answered, and/or
- Always (regardless of the state of the phone).

The Call Forwarding settings can be changed by clicking on the following button in the ribbon bar near the top of the application:



When this button is clicked, the following appears:

 A light gray dialog box with the title 'Set Call Forward:'. It contains three rows of settings:

- 'Always:' with an unchecked checkbox and an empty text input field.
- 'Busy:' with an unchecked checkbox and an empty text input field.
- 'No Answer:' with an unchecked checkbox and an empty text input field.

 At the bottom right of the dialog is a button with a green checkmark icon and the text 'Update'.

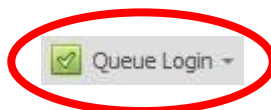
In this window, you can specify where to forward calls under each of these conditions, whether to another extension on the phone system, or to an outside number. Note that, even if you have entered a call forward destination, you must check the box next to it in order for the call forwarding to be active.

If the "Busy" or "No Answer" option is not checked, the call forwarding for these two types will default to forwarding to the extension user's voice mail box.

Call Queuing

There are two buttons in ESI Communicator that can be utilized in order for the user to be able to view and manipulate his or her status in one or more queues on the phone system. Each of these is located on the ribbon bar near the top of the application window and is described in detail below.

A user can log into and out of queues, and view logged-in status, by clicking on the following button:



After clicking on it, a drop-down menu similar to the following appears:

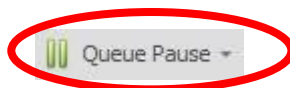


The appearance of this menu will vary, depending upon the queues that have been configured in your phone system. For each queue, you may toggle your logged-in status by clicking on the corresponding menu item--unless you are a "static" member of the queue, in which case you are always logged in. The check icon, when present, indicates that you are logged into the queue:



You also have the option to "Log Into All Queues" or "Log Out Of All Queues" by clicking on the corresponding menu item.

A user can pause (temporarily become unavailable for calls from the queue) or un-pause his or her status in one or more queues, as well as view paused status, by clicking on the following button:



After clicking on it, a drop-down menu similar to the following appears:



The appearance of this menu will vary, depending upon the queues that have been configured in your phone system. For each queue, you may toggle your paused status by clicking on the corresponding menu item. The "pause" icon, when present, indicates that you are paused in the queue (meaning that you are temporarily unavailable to receive calls from the queue on your phone):



For your convenience, if you are logged out of the queue, the menu item will show "(LOGGED OUT)". Your logged-in status for a queue overrides your paused status; in other words, if you are not paused in a queue, you still will not receive calls from the queue if you are logged out of the queue.

You also have the option to "Pause All Queues" or "Un-pause All Queues" by clicking on the corresponding menu item.

Non-Forced Account Codes

ESI Communicator supports the entry of a non-forced account code while a call is in progress. A non-forced account code is simply an optional, user-chosen string of digits that helps associate the call with a specific client of your organization. Non-forced account codes are frequently used in certain businesses, such as in the legal profession, in order to assist in billing for one's time spent on the phone with clients.

Note that, in order to run a report showing call details and associated account codes, an additional PC application, *ESI Call Accounting Pro*, is required. This application is licensed and sold separately.

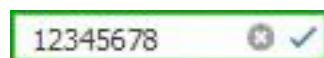
When you are not engaged on a live call, the Account Code entry box on the ribbon bar at the top of the application is grayed out, like so:



This is to indicate that an account code may only be entered while you are engaged on a live call. When you are on a live call, the Account Code entry box changes so that you may enter an account code:



The account code is simply a number of your choosing and may be from 1 to 15 digits long. After entering the account code at any point during the call, make sure to click the small check button shown next to the account code, or press the Enter button on your keyboard. When you do so, the Account Code box will become outlined in green, like so:



The green outline indicates that the account code you entered has been registered for the call.

For convenience, *ESI Communicator* will keep track of what account codes are associated with specific phone numbers. If you make or receive a call and you, or any other *ESI Communicator* user of your phone system, has previously entered an account code for that number, *ESI Communicator* will automatically populate the account code in the Account Code box. The Account Code box will be outlined in yellow, like so:



The yellow outline is to notify you that there is an account code associated with this phone number; however, the account code is not yet associated with this *particular* call. In order to associate the account code with this specific call, you must click on the check button in the Account Code box, whereupon the outline will change from yellow to green, indicating that the account code is now associated with this specific call.

If you have made a mistake and entered an incorrect account code during a call, you may correct it at any time during the remainder of the call by changing the account code in the Account Code box and either clicking the check button or pressing Enter.

Visual Voicemail Management

With Visual Voicemail, you can see various details about all of the messages in your personal mailbox (as well as any other mailboxes it is your responsibility to monitor). Here is an example of the Voice Mail section of *ESI Communicator*:

| My Calls | | Voice Mail (5) | | | | | | | | | | | | |
|---------------|---------------|-----------------|-------------|----------|--|--|--|--|--|--|--|--|--|--|
| Mailbox | Time Stamp | From Name | From Number | Duration | | | | | | | | | | |
| 106 - Stephen | 5/13/20 8:18A | Mary | 105 | 00:00:51 | | | | | | | | | | |
| 106 - Stephen | 5/12/20 8:36A | Mary | 105 | 00:00:23 | | | | | | | | | | |
| 106 - Stephen | 5/11/20 5:51A | WIRELESS CALLER | 804376 | 00:00:56 | | | | | | | | | | |
| 106 - Stephen | 5/9/20 1:05P | ENTERPRISES | 383220 | 00:00:46 | | | | | | | | | | |
| 106 - Stephen | 5/7/20 6:17A | WIRELESS CALLER | 70226 | 00:00:06 | | | | | | | | | | |

If there are new messages in any mailbox you are monitoring, the number of new messages will appear in parentheses next to the words "Voice Mail" in the Voice Mail tab label:



The number in parentheses, if present, after "Voice Mail" on the tab label indicates the total number of new messages in all mailboxes you are monitoring. If you are monitoring more than one mailbox, therefore, this number may be different than the number in the red badge shown on the "Voice Mail Access" button in the ribbon bar at the top of the application. The number in the red badge indicates only how many new messages are in your personal mailbox.







The voice mail messages displayed above are examples only; of course, your view will depend on the particular messages you are monitoring. The information displayed for each message is as follows:

| Item | Description |
|--------------------|--|
| Mailbox | The number and name of the mailbox to which the message belongs. |
| Time Stamp | The date and time the message was originally left by the caller. |
| From Name | The Caller ID Name, where available, of the inbound caller, or the extension name of the caller if the message was left by a user of your phone system. |
| From Number | The Caller ID Number, where available, of the inbound caller, the number dialed if associated with an outbound call, or the extension name of the caller if the message was left by a user of your phone system. |
| Duration | The length of the message in HH:MM:SS format. |

In addition, if the entire line for a message is in **bold**, this indicates that the message is a New message (otherwise, it is an Old message).

The miniature icons in each line representing a voice mail message are there for you to perform operations on the message. Whether an icon is visible may depend upon the context of that message. For example, the "Reply" icon will only be visible for those messages that have been left by another user of your phone system. The icons, and their meanings, are as follows:






| Icon | Description |
|------|--|
| | Play the voice mail message through your desk phone. |

| Icon | Description |
|---|---|
|  | Call the originator of the voice mail message. If from an outside call, the Caller ID Number (where available) or number dialed; if from another user of your phone system, their extension number. |
|  | Reply to message sender. This icon will be visible only if the message was left by another user of your phone system. |
|  | Move or Copy a voice mail message to another mailbox on your phone system, with the ability to record an optional prefix audio introduction. |
|  | Delete the voice mail message from the mailbox. |
|  | Download and playback a voice mail message on your PC or download and save a voice mail message to your PC as a WAV audio file. |
|  | Save voice mail message to another folder (i.e., save as Old or Save as New). |

As indicated, clicking the "Play" icon will initiate playback of the message through your desk phone. Double-clicking the line for the message will also serve to initiate playback of the message through your desk phone. When you play a new message, whether to your phone or by downloading and playing via your PC, the message will automatically be marked as Old. Initiating playback of a message through your desk phone via *ESI Communicator* will cause playback controls to appear on-screen:



The available playback buttons, and their meanings, are as follows:

| Button | Description |
|---|---|
|  | Rewind the voice mail message by a few seconds. |
|  | Pause or resume playback of the voice mail message. |
|  | Fast Forward the voice mail message by a few seconds. |
|  | Replay the voice mail message from the beginning. |
|  | Stop playback of the voice mail message and hang up the desk phone. |

If you download and play a message via your PC, the playback controls available will depend upon what is provided in the default program on your PC designated for playback of WAV audio files.

Drag-and-drop functionality of voice mail messages is supported in *ESI Communicator* for easy moving or copying of a message to another mailbox. This is done by dragging a voice mail message from the "Voice Mail" visual region of *ESI Communicator* to an extension button in the Extensions visual region and then dropping it. After dragging and dropping a message, a window will appear allowing you to

specify whether the message is to be copied or moved, and additionally allowing you to record an optional prefix audio introduction:



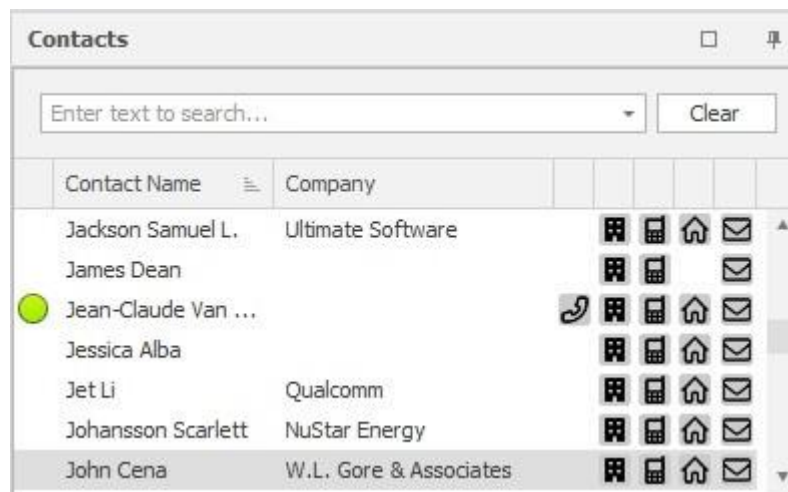
The screenshot shows a dialog box titled "Copy or Move Voice Mail Message". Inside the dialog, there is a label "Copy or move voice mail message to mailbox:" followed by a dropdown menu showing the number "105". Below this, there are two radio button options: "Copy voice mail message" (which is selected) and "Move voice mail message". At the bottom of the dialog, there are three buttons: "Record Prefix" (with a red microphone icon), "OK" (with a green checkmark icon), and "Cancel" (with a red X icon).

As has been indicated previously, it is possible via *ESI Communicator* to monitor more than one mailbox on your phone system. *ESI Communicator* will track more than one mailbox for you under either of the following two circumstances:

- One or more additional extensions (besides your primary extension) have been registered to your desk phone by a system administrator.
- A "Voice Mail Status List" App Button has been programmed on your desk phone by a system administrator.







Contact Management

The Contacts region of ESI Communicator appears as follows:



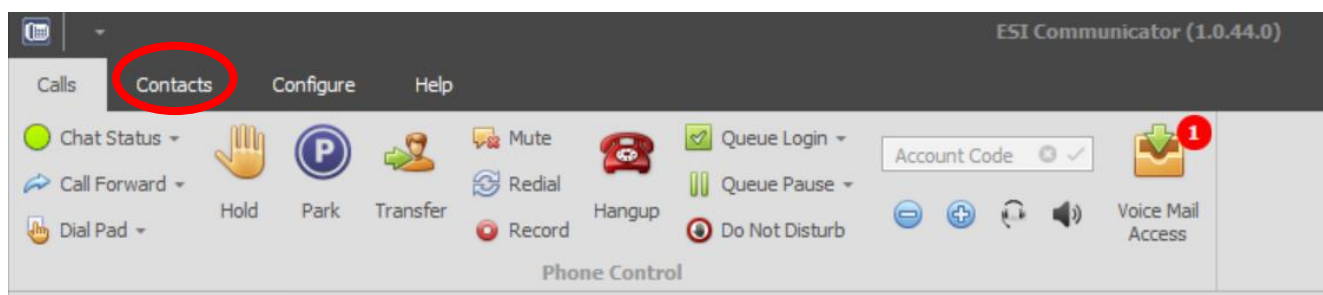
In the example above, we have populated the Contact list with a few fictitious contacts; your Contacts window, naturally, will be different depending upon which contacts you have added or imported.

In the Contacts window, each contact is represented by a single row. The columns in the Contacts window are as follows:

| Item | Description |
|---|--|
|  | If the contact has an extension on the phone system, this will indicate the extension's current Chat availability. For more information, see " Extension Button Icons ". |
| Contact Name | The contact's first and last name. |
|  | If the contact has an extension on the phone system, this icon shows the extension's current status. For the meaning of the background color of the icon, please refer to " Extension Button Background ". |
|  | If this icon is present, the contact has a business phone number entered, and it can be dialed by clicking on the icon. |
|  | If this icon is present, the contact has a mobile (cell) phone number entered, and it can be dialed by clicking on the icon. |
|  | If this icon is present, the contact has a home phone number entered, and it can be dialed by clicking on the icon. |
|  | If this icon is present, the contact has an email address entered, and an email to the contact can be initiated by clicking on the icon. |

Accessing Contact Management Options

To access the available contact management options (Add, Import, Edit, Delete), click on the "Contacts" tab of the ribbon bar which is located at the top of the application window:

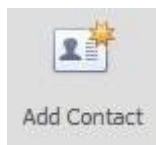


When you do so, you will see the following:



Adding A Contact

To add a contact, you may click on the "Add Contact" button on the ribbon bar (see "[Accessing Contact Management Options](#)" to navigate to the "Edit" tab on the application ribbon bar):



When you click on this button, the following window appears:

Add Contact

First Name:

Last Name:

Company:

Title:

Department:

Email Address:

Business Phone:

Fax:

Cell Phone:

Home Phone:

This contact has an extension on our company phone system:

Save

Cancel

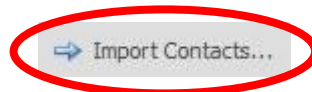
The fields in this window are as follows:

| Item | Description |
|----------------|---|
| First Name | The contact's first name. |
| Last Name | The contact's last name (surname). |
| Company | The company name to which the contact belongs. |
| Title | The contact's job title within the company. |
| Department | The department within the company this contact belongs to. |
| Email Address | The contact's email address. |
| Business Phone | The contact's business phone number. The second box to the right can be used to keep track of an extension number. |
| Fax | The contact's fax number. The second box to the right can be used to keep track of an extension number. |
| Cell Phone | The contact's cell (mobile) phone number. |
| Home Phone | The contact's home phone number. |
| Extension | "This contact has an extension on our company phone system": If this applies to the contact, you may enter the contact's extension number in this box, and ESI Communicator will keep track of the extension's phone status and Chat status. See " Contacts Visual Region " for more details. |

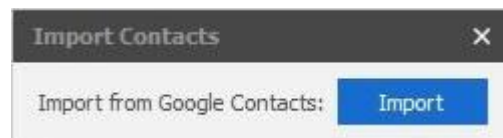
Importing Contacts

To make the entry of multiple contacts easier, ESI Communicator has an option to import contacts.

To import contacts, you may click on the "Import Contacts..." button on the ribbon bar (see "[Accessing Contact Management Options](#)" to navigate to the "Edit" tab on the application ribbon bar):

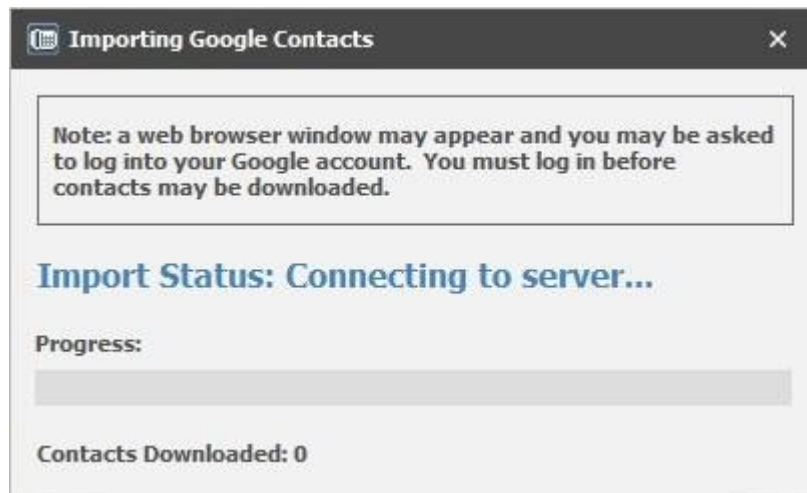


When you click on this button, the following window appears:



At this time, the only source from which to import contacts is via Google Contacts.

When you click on the "Import" button, the following window appears:



As the Google Contacts import progresses, this window will change to reflect the Import Status and the overall progress of the import process, as well as how many contacts have successfully been downloaded. When the import process is complete, you will see the following:

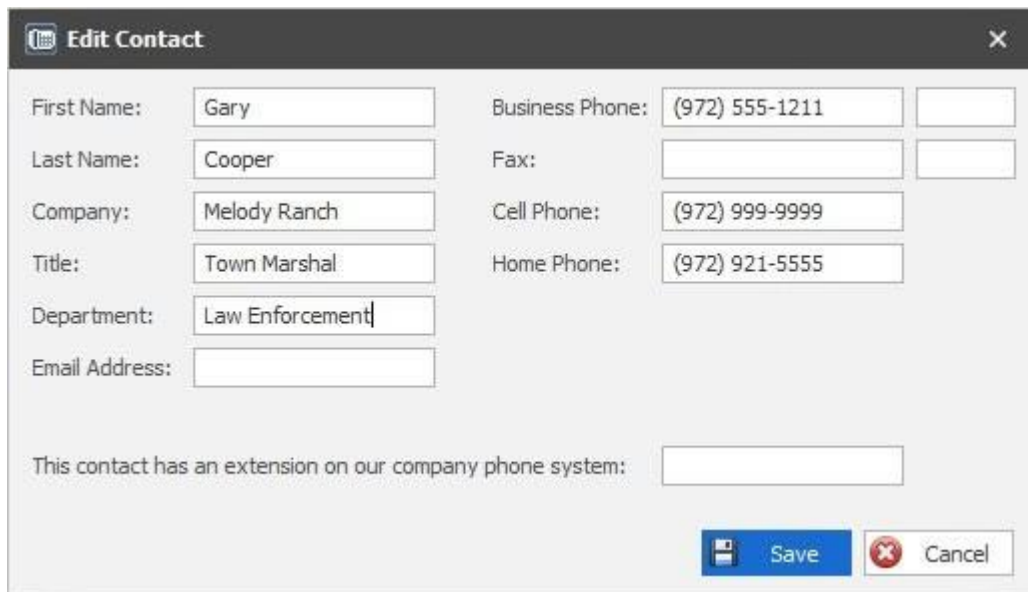


If an error has occurred during the import process, a dialog box will appear, showing the error, instead of the box above appearing.

Editing A Contact

There are two ways in which an existing contact can be edited. The first is that you may simply double-click on the contact's name in the Contacts window. The second is that you may highlight the row corresponding to the contact by clicking on it, and then clicking the "Edit Contact" button in the "Edit" tab of the ribbon bar at the top of the application window. For more information on accessing contact management options, refer to the section, "[Accessing Contact Management Options](#)".



The "Edit Contact" window appears as follows:



Edit Contact [X]

| | | | | |
|----------------|--|-----------------|---|----------------------|
| First Name: | <input type="text" value="Gary"/> | Business Phone: | <input type="text" value="(972) 555-1211"/> | <input type="text"/> |
| Last Name: | <input type="text" value="Cooper"/> | Fax: | <input type="text"/> | <input type="text"/> |
| Company: | <input type="text" value="Melody Ranch"/> | Cell Phone: | <input type="text" value="(972) 999-9999"/> | |
| Title: | <input type="text" value="Town Marshal"/> | Home Phone: | <input type="text" value="(972) 921-5555"/> | |
| Department: | <input type="text" value="Law Enforcement"/> | | | |
| Email Address: | <input type="text"/> | | | |

This contact has an extension on our company phone system:

 **Save**  **Cancel**

Naturally, the contact details you see in this window will correspond to the contact's actual information. You may change any of these fields as desired, and then click the "Save" button to save:

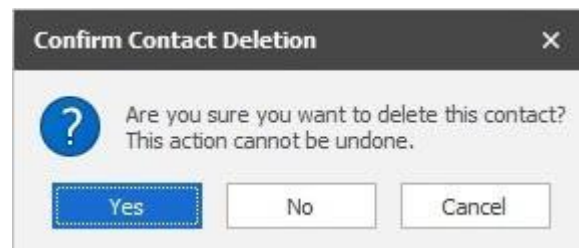


Deleting A Contact


To delete a contact, first highlight the row corresponding to the contact in the Contacts section by clicking on it. Then, click the "Delete Contact" button on the "Edit" tab on the ribbon bar at the top of the application. To access contact management options, refer to the section, "[Accessing Contact Management Options](#)". When you click the "Delete Contact" button...



...a window will ask you to confirm that you wish to delete the contact:



Confirm Contact Deletion [X]

 Are you sure you want to delete this contact?
This action cannot be undone.

Yes

Click the "Yes" button to confirm that you wish to delete the contact:



Transferring A Call To A Contact

The Contacts visual region in *ESI Communicator* supports drag-and-drop functionality of calls from the Calls visual region. This means that if you have a live call, you can drag it and drop to one of the contacts in your Contact list. When you do so, the call will be transferred to the outside contact. You are given a choice of the contact's phone numbers to which you may transfer, as well as whether to perform a supervised or non-supervised (blind) transfer:

Transfer Call To: ×

ABC Company

John Smith

☒ Business Phone: (972) 555-1234

☐ Cell Phone: (972) 555-6789

☐ Home Phone: [N/A]

Transfer type:

☒ Blind Transfer

☐ Attended Transfer

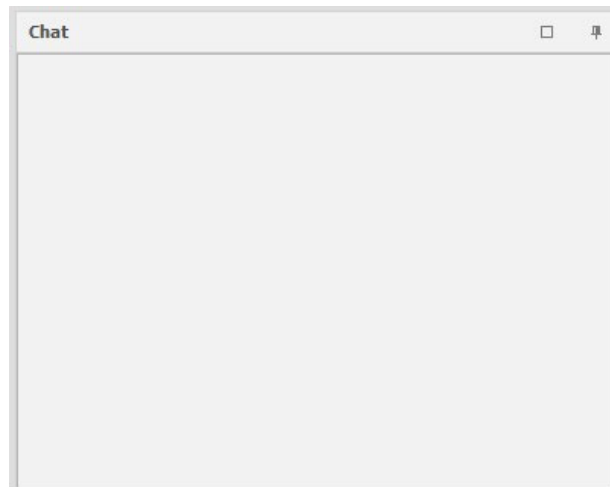
 Transfer

 Cancel

Chat

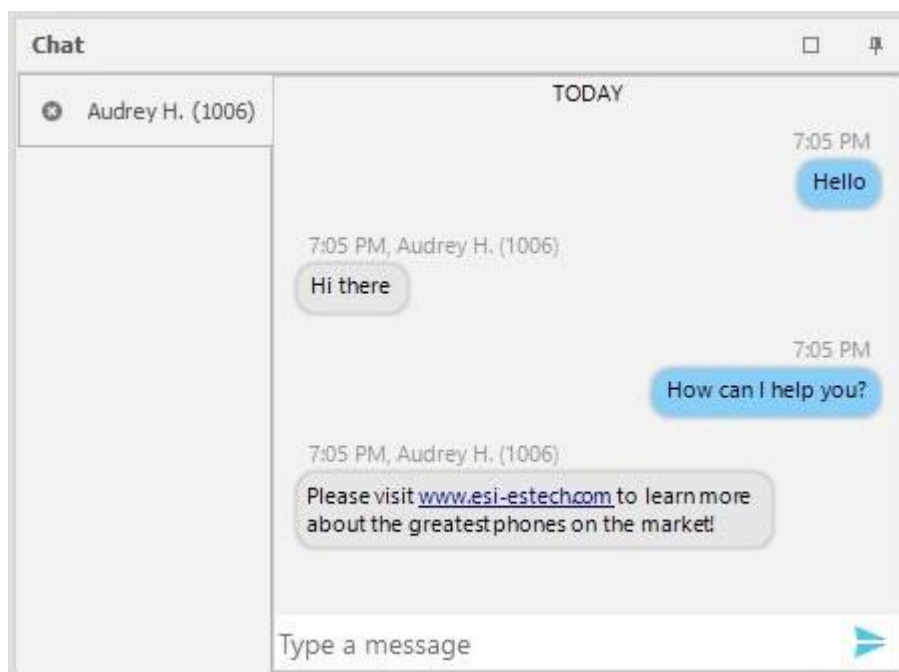
ESI Communicator features the ability to send text-based messages to, and receive messages from, other ESI Communicator users on the phone system. This is helpful in situations either where a text-based communication would be more efficient than a live phone call, or where a phone call is not possible because the recipient is on another phone call or the recipient's phone has been placed in Do Not Disturb.

The Chat region of the application appears as follows:

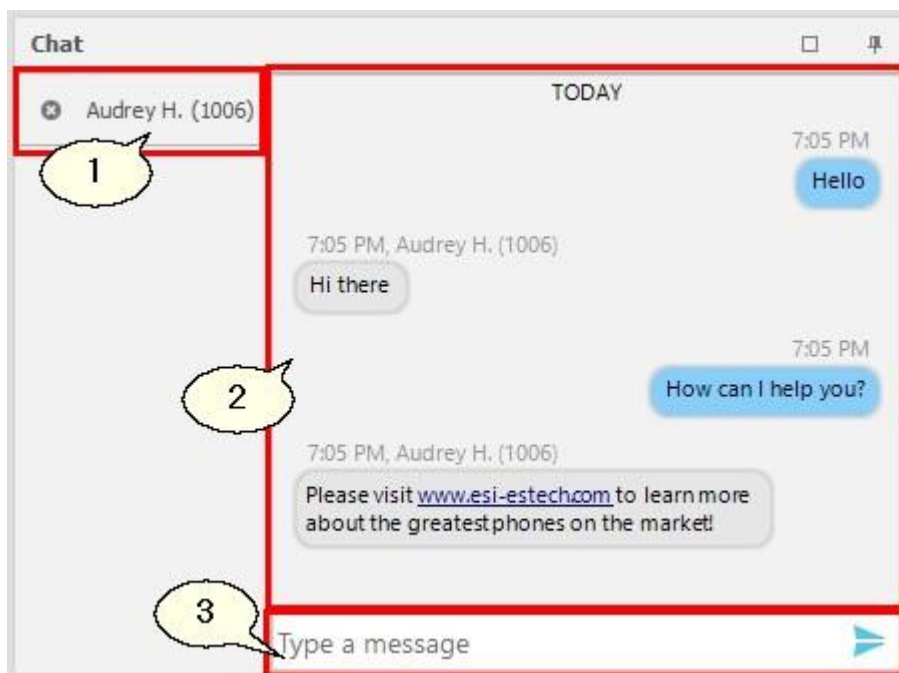


As you can see, by default nothing shows in this region. In order to populate this region, you must either initiate a chat conversation with another user, or they must initiate a chat conversation with you. Please refer to the section, "[Initiating A Chat](#)" for more details.


Once a chat conversation has been initiated, a tab representing that conversation will appear in the Chat visual region, like so:



The sections of the chat window are as follows:

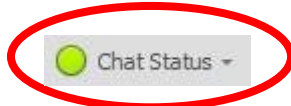


The description of each section is as follows:

| Section | Description |
|---------|---|
| 1 | Indicates the party with whom you are connected. By hovering over this section, a tooltip will appear showing you the name and extension number of all participants. Currently, ESI Communicator is designed to allow you to chat with a single other extension only; however, multi-party chat may be supported in the future. You may exit out of a chat conversation by clicking on the small "x" button on the left side of this tab. If you are engaged in multiple chat conversations, each one will be represented with its own tab. |
| 2 | This section is where the chat conversation appears for all participants. Your own chat segments appear on the right side, while the chat segments of any other participants in the chat show on the left side. Above each chat bubble on the left side is an indicator of which party generated the message. Currently, this is limited to either the other extension with which you are chatting, or ESI-Bot, a friendly automated chat bot that will keep you apprised of the current state of the chat conversation--for example, when a participant has joined or left the chat conversation, or has gone offline. |
| 3 | This is where you will compose your chat responses. Simply type your message in this box end then either hit the Enter key on the keyboard, or click on the Send icon:  |




Chat Status

You may indicate your availability for a chat conversation, and your general availability, by modifying your Chat Status. To change your status, click on the "Chat Status" button:



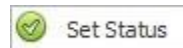
When you do so, a drop-down window will appear allowing you to change your status:

The status descriptions are as follows:

| Status | Description |
|---|---|
|  | Available. Indicates that you are available for a chat conversation. |
|  | Away. Indicates that you have left your workstation or the office, and other users will not be able to initiate a chat conversation with you. |
|  | Busy. Another user may initiate a chat conversation with you, but you would like to indicate that you will be slow to respond, depending upon your workload, and/or may prefer not to be bothered except with urgent matters. |

In addition to setting your status, you may optionally include a message viewable by other ESI Communicator users that will give them additional information about your status.

When you have finished specifying your chat status, click on the "Set Status" button to confirm:



Initiating a Chat

To initiate a chat conversation with another user, you may click the Chat Status icon associated with that user in either of the following areas:

"Extensions" region: each extension button shows that user's chat availability in the lower-left corner of the button. Depending upon that user's availability, you may initiate a chat conversation with them by simply clicking on the status icon. For more information on the status icon colors and their meanings, refer to the section, "[Extension Button Icons](#)".

"Contacts" region: If a contact has an extension on the phone system associated with it, the leftmost column of the row corresponding to that contact will show their chat availability status. Depending upon that user's availability, you may initiate a chat conversation with them by simply clicking on the status icon. For more information on the status icon colors and their meanings, refer to the section, "[Extension Button Icons](#)".

Terminating a Chat

To terminate a chat conversation in progress, you may do either of the following:

Click the small "x" icon on the tab corresponding to that conversation in the Chat visual region of ESI Communicator; or Exit from the ESI Communicator application.

In either case, the other participant in the chat conversation will receive a message that you have left the chat.

Chat Notifications

When you receive a new chat message, you will receive a short audible notification to draw your attention.

If the corresponding chat window is not focused because you are viewing a different chat window, the tab of the chat conversation for which you have a new message will be colored red to draw your attention. Clicking on the tab will focus the corresponding chat window and remove the red color.

If ESI Communicator is minimized and you cannot see the Chat region at all, a "toast" notification will appear on your PC screen as a secondary indicator to an audio notification, indicating that there has been chat activity. A "toast" notification is a small window that appears at the bottom of your PC screen for a duration of time to alert you to activity. The window features a link containing the sender of the message and the message they sent. By clicking on the link, you can cause the ESI Communicator window to be restored, and the corresponding chat conversation to receive focus.

Automatic Links

For convenience, certain types of information entered into a chat conversation in ESI Communicator will be automatically turned into hyperlinks, allowing the user to click on the link to perform an action. The types of information that are converted into links, and the associated action that will be processed upon clicking the link, are as follows:

| Link Type | Description |
|---------------|---|
| Phone Number | Each phone number will be converted into a hyperlink. Most phone numbers will automatically be recognized, regardless of the punctuation you use. International numbers should be preceded by a "+" and the appropriate country code. When the link is clicked, a dialog box will appear, confirming you wish to dial the number. Upon clicking "Dial", the phone number will be dialed through your phone. |
| Web Site | Web sites will be converted to links. Most web site addresses will be automatically recognized; however, you can ensure that any web site address is recognized by prefixing it with "http://" or "https://". Clicking the link will launch the default web browser on your PC and navigate to the web site address. |
| Email Address | Email addresses will be converted into links. Clicking the link will launch the default email client application on your PC, with the email address automatically populated in the "To:" field of a new email. |

Workspaces

ESI Communicator supports the concept of workspaces; that is, the ability to change the layout of visual regions within ESI Communicator (such as "My Calls", "Parked Calls", "Contacts" and so forth), and to save layouts for future use. In this way, you can choose the layout or layouts that are most convenient for you and that allow you to operate the most efficiently for your work flow.

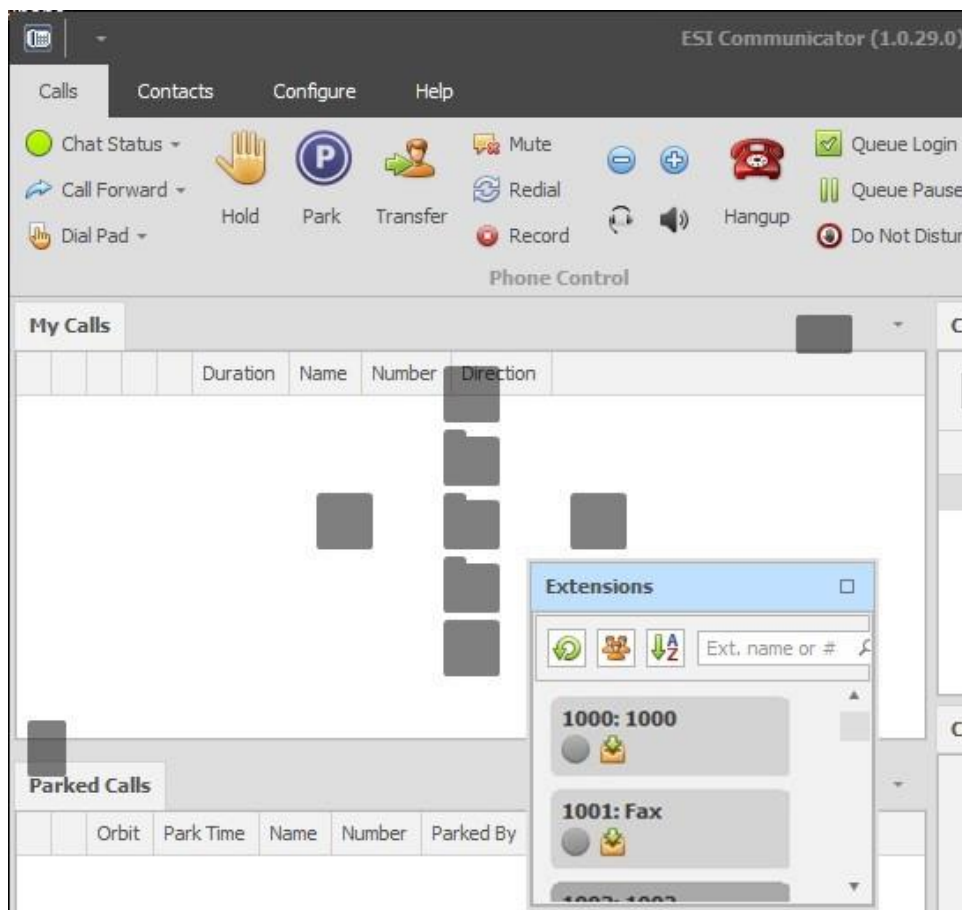
Changing Screen Layout

Each of the following regions in ESI Communicator are contained within dockable panels:

- My Calls
- Parked Calls





- Extensions
- Contacts
- Chat

Dock panels can be docked, floating or auto-hidden. To dock or undock a panel, simply click its header and drag the panel. As you drag the panel over the main ESI Communicator window, docking hints appear (see image below). Use these hints to dock the panel to the desired position.



Docking hints are semi-transparent square elements that allow you to dock a panel to a form's edges, or to an existing container as a tab, or between other docking elements. These hints are displayed separately or grouped in a docking guide (e.g., in the ESI Communicator window's central area). Finally, a docking zone is a semi-transparent preview of exactly where your panel will be docked. This zone is displayed when you drag a panel into a docking hint, but before you drop it.

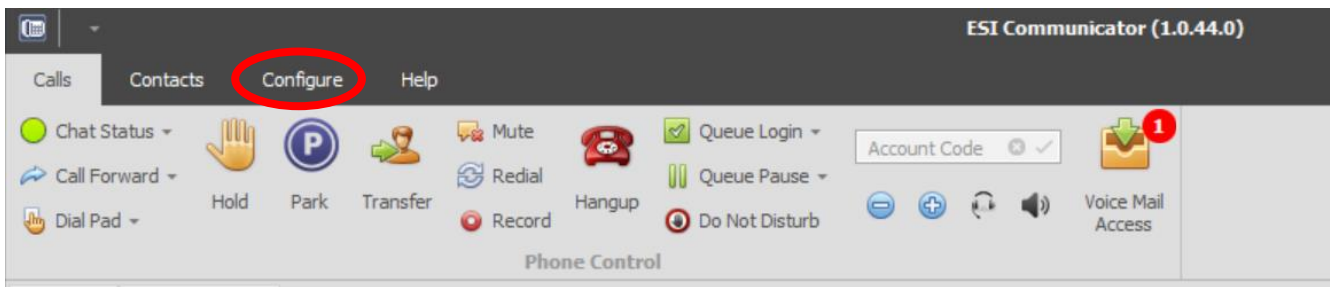
Dock panels may have multiple state change buttons in their top right corner:

| Button Type | Description |
|---|---|
|  | Maximize - maximizes the panel to full-screen size. |
|  | Restore - restores the panel back to its original size. |
|  | Auto-hide - hides the panel, leaving only its header visible. Clicking on the header makes the panel visible. |
|  | Dock - restores the panel and makes it visible. |

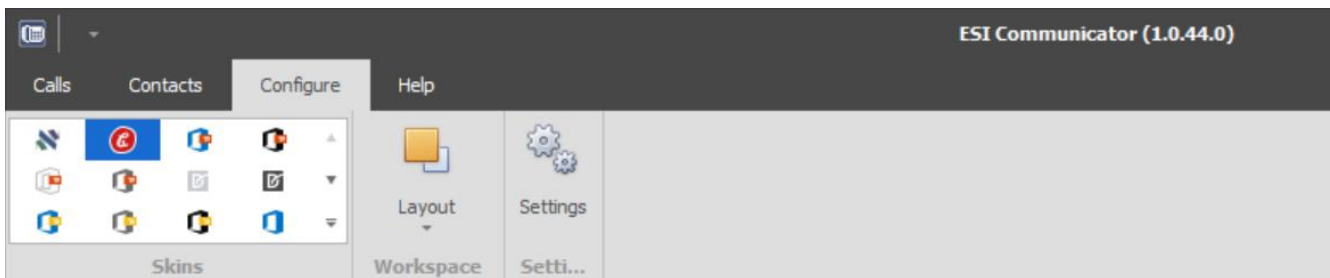
Workspace Management

ESI Communicator features workspace management; that is, the ability to save and restore specific screen layouts.

If you find that there is a workspace layout (specific arrangement of visual areas) in ESI Communicator other than the default layout that is better for you, you may create one or more workspace layouts (see, ["Changing Screen Layout"](#) for more details). Once you have done so, you may use the "Layout" button within the "Workspace" section of the ribbon bar at the top of the ESI Communicator application window. To access this area, click on the "Configure" tab at the top of the ribbon bar:



When you do so, the ribbon bar will change to the following:



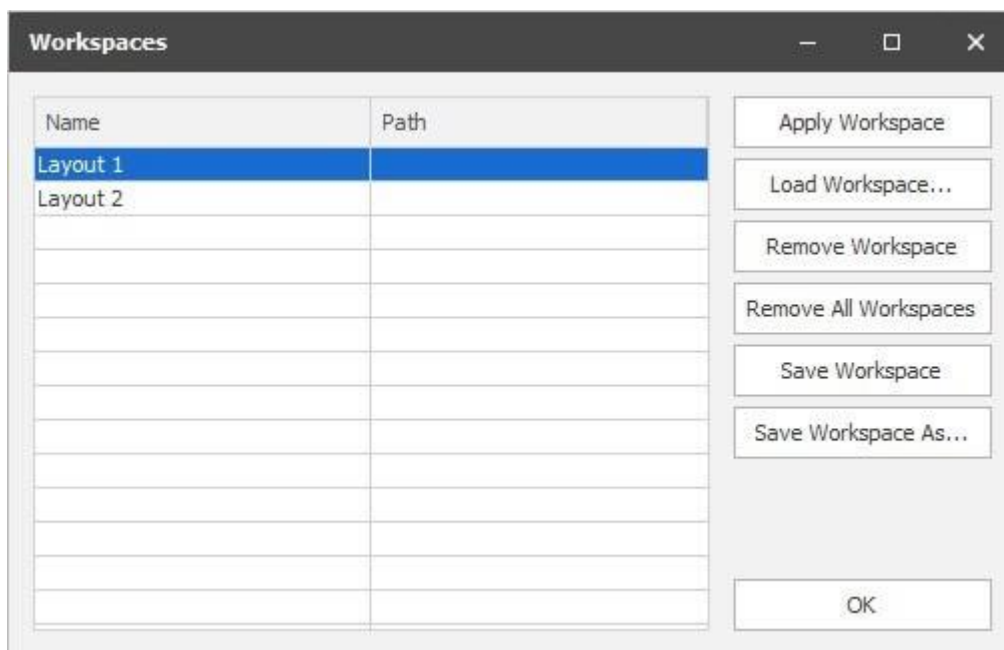
When you click the "Layout" button, the following drop-down menu will appear:



Your choices are as follows:

| Option | Description |
|-------------------|--|
| Capture Workspace | Allows you to capture the current workspace layout settings. The layout name will be added as a menu item to the "Layout" menu; it additionally will be accessible from the "Workspaces" dialog box (see below). |
| Save Workspace | Save a workspace layout to a file. |
| Load Workspace... | Load a workspace layout from a file you have previously saved. |
| Workspaces... | Shows the "Workspaces" dialog box (see below). |

When clicking the “Workspaces...” option - The "Workspaces" dialog box appears as follows:



On the left side of this window, all workspace layouts that you have captured will be represented. The operations for the buttons on the right side of this window are as follows:

| Button | Description |
|-----------------------|--|
| Apply Workspace | Apply the selected workspace layout to the ESI Communicator application. |
| Load Workspace... | Load a workspace layout from a file you have previously saved. |
| Remove Workspace | Remove the selected workspace layout from the list. |
| Remove All Workspaces | Remove all workspace layouts from the list. |
| Save Workspace | Save the selected workspace layout. |
| Save Workspace As... | Save the selected workspace layout (you will be prompted to choose the save location and file name). |

Support

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