ESI Cloud PBX

Quick-start Guide

0455-1154 Rev. A

For on-line help, visit www.esi-estech.com/support.

About ESI

ESI (Estech Systems, Inc.) designs and manufactures high-performance phone systems for businesses and organizations. ESI uses advanced technology to design IP and digital communications systems that integrate built-in capabilities, advanced features, and highly differentiated applications into flexible products that are easy to use and keep employees productive. ESI has sold over 250,000 business communications systems through hundreds of factory-trained Certified Resellers. Founded in 1987, ESI is a privately held corporation with headquarters in Plano, Texas.



We Make It Easy To Communicate

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Getting started

This *Quick-start Guide* is intended to offer you a quick walkthrough of the **ESI Cloud PBX** solution, from setup to programming, reporting, and overall maintenance. Troubleshooting will be added to a later revision.

By now, you have received the phones which have been pre-provisioned for the ESI service. You have also received your Reseller login information that you'll need to use to log into your Reseller dashboard. Note that this guide can be used with either your demo domain account or with a customer domain. Now, you just need to configure the system and assist in training the new end users.

The first step is to log into your Reseller account via the Reseller dashboard. Enter the URL that was sent to you, along with your user name and password.



Once you get logged into your Reseller account, you'll see there are three key icons across the top of your dashboard screen.

The **Home** icon results for call patterns across all the domains you manage as a Reseller, with additional statistics on the right-hand side.



The **Domains** icon shows all domains of your customers that you manage. A domain is like a tenant within the cloud system, but is fully separated from other tenants. If this is your first time logging in, you will see two entries: the domain name for your new customer(s) or demo account; and your login domain for your own administrators. Your own Reseller login account will generally have your company domain name as the domain.



Inventory shows all the DID numbers you manage and any phone hardware you've added for your customers. If you have just signed up a customer, you should see some DIDs in the list, assigned to that new domain and set as **Available Number**. If you had previous customers, all their numbers will still be listed here, as well.



Return to the **Domains** screen to start setting up accounts.

Gathering info

Before you set up the customer's system, you should gather all user account information, the company's time frames (*e.g.*, business hours), call queues, conference needs, and so forth. Other features, such as the auto attendant, can be done interactively with the end customer, if needed. However, prompts will eventually need to be recorded and uploaded, as well. It is recommended to wait until after the auto attendant design is completed and tested before completing any prompt recordings.

Managing the domain

Once you have the necessary information, click the name of the company you want to set up, review or manage.

Domains	
Enter a domain name or description	Q
Name 🔺	Description
Deathstar.mil Manage	Deathstar Communications System
galacticempire.gov	RESELLER AND SITH LOGINS ONLY

To set up users for a new company, click the domain name link to be taken to the configuration screen. Click **View all domains**, near the top of the screen, to return to the **Domains** screen.

You are managing Deathstar Communications System (Deathstar.mil). View all domains.

Creating time frames

Time frames define when **answering rules** apply for users and auto attendants apply. You can create a time frame that's always on, as in the case of a do-not-disturb rule, or one that specifies specific days and times to define business hours or after-hours periods. In this section, we'll define some time frames and then later apply some answering rules to those. The answering rules are actually set per user account, since each user may want to have different phone behavior during those time frames.

- 1. Make sure you are in the domain you want to manage.
- To create a Time Frame, click Settings > Time Frames and select Add Time Frame. It is recommended to create at least three time frames, but none are actually required. Here is a setup example for typical business hours:

Name	Storm Trooper 1st S	Shift	Note: Nar	me cannot be cha	anged		
When	Always						
	Certain days of the	ne week and tir	nes				
	Sunday	(0.05.414		12.22.20	0.00 THE	11.50 DW	•
	Monday	12:00 AM	0:00 AM	12:00 PM	6:00 PM	11:59 PM	(
		12:00 AM	6:00 AM	12:00 PM	6:00 PM	11:59 PM	0
	V Tuesday	12:00 AM	6:00 AM	12:00 PM	6:00 PM	11:59 PM	•
	Wednesday	12.20.444		10.00 (04)	2.00 PH	11.50 DH	•
	Thursday	12.00 AM	0.00 AM	12.00 PM	0.00 PM	11.33 PM	(+)
		12:00 AM	6:00 AM	12;00 PM	6:00 PM	11:59 PM	-
	Friday	12:00 AM	6:00 AM	12:00 PM	6:00 PM	11:59 PM	Ŧ
	Saturday			40.00.004			•
	Specific dates or	ranges	6:00 AM	12:00 PM	6:00 PM	11:59 PM	

3. When the Certain days of the week and times radio button is selected, the Add a Timeframe dialog will expand, with a timeline slider for each day of the week. Select the customer's normal business days and then move the sliders on both ends to frame the business day. You can also click the slider button and use the arrow keys on the keyboard to move them. If you click the + icon to the right on that day, the slider will split into two sliders. You can do this if you want other rules to apply at lunch time. Click Save when done.

Here is an example of a split shift similar to what might be set up for an after hours scenario:

Name	Droid Maintenance		Note: Nar	me cannot be cha	anged	
When	Always					
	Certain days of the	ie week and ti	mes			
	🔽 Sunday	12:00 AM	6:00 AM	12:00 PM	8:00 PM	11-59 PM
	Monday	12.00 Am		12.001 m	0.001 m	(
	Tuesday	12:00 AM	6:00 AM	12:00 PM	6:00 PM	11:59 PM
	I uesday	12:00 AM	6:00 AM	12:00 PM	6:00 PM	I Q
	V Wednesday	12:00 AM	6:00 AM	12:00 PM	6:00 PM	11:59 PM
	Thursday					(§
	Friday	12:00 AM	6:00 AM	12:00 PM	6:00 PM	11:59 PM
		12:00 AM	6:00 AM	12:00 PM	6:00 PM	11:59 PM
	V Saturday	12:00 AM	6:00 AM	12:00 PM	6:00 PM	11:59 PM
	Specific dates or	ranges				

- 4. As noted above: When the Certain days of the week and times radio button is selected, the Add a Timeframe dialog will expand, with a timeline slider for each day of the week. Select the customers' normal after-hours/days and then move the sliders on both ends to frame the business day. You can also click the slider button and use the arrow keys on the keyboard to move them. For after-hours periods, click the + icon to the right on that day and the slider will split into two sliders. Use the left-hand side to cover the time from, *e.g.*, 12:00 AM (12 midnight) to opening and the right-hand side to cover the time from closing to 12:00 pm (12 noon).
- 5. When done, click Save.

An **Always** time frame can be created so that any user can apply an answering rule to it. A common application of this would be a do-not-disturb type of rule. Here is an example **Always** time frame to which we'll later apply an answering rule:

Name	Vaders Nap Time	Note: Name cannot be changed
When	Always	
	Certain days of the week and times	
	Specific dates or ranges	

These time frame rules will be available to configure answering rules when setting up user accounts or creating an auto attendant — such as one auto attendant for business hours and another one for after hours. If the customer already has a list of holidays, time frames can be created for each holiday as specific dates or ranges rules.

The rules can also be used by Premier users to create their own answering rules. These Administrator-created time frame rules will be displayed to users as **shared** rules; users can't change these rules. However, Premier users can also create their own custom time frame rules if the shared ones don't meet their needs or they want to create their own vacation day time frame(s), as well.

Creating user accounts

Next, add **user accounts** using the information gathered from the customer. In this section, we'll create a user account and review the options.

Creating the initial user profile

1. Click Users at the top of the screen when you are editing a domain.

2. Click Add User.

A dialog box will pop up, requesting some basic information. Here's an example of the kind of information you might enter:

First Name	Darth		
Last Name	Vader		
Extension	1000	Note: Cannot be changed	
Department	Siths	New	
User's Scope	Office Ma	anager	
Email Address(es)	darth.vad	ler@galacticempire.gov	
	🔽 Enable	e Voicemail none Extension	
New Password	******	•	
	Note: Pa	assword must be numbers only.	
Confirm New Password		•	

The **extension number** can be either a three- or four-digit number. Departments are created as you add them. In the example above, the **New** badge appears beside the name since this department name didn't previously exist. It's not required to enter a department name.

The **user's scope** is based on the seat type ordered. This can be **No Portal (shared seat)** if you don't want someone to be able to log in and change settings. Select **User**, **Premier User**, or **Office Manager**.

The **e-mail address** is required. It's used for unified messaging options, such as delivery of voice mail messages to the user's e-mail address.

For most users, the **Enable Voicemail** and **Add Phone Extension** boxes will always be checked. There may be cases, such as for guest mailboxes, where you would not add a phone device since those calls will always go only to voice mail.

The **password** must be numbers only, and at least four digits in length. This is because the same password is used when a user calls his/her voice mailbox. The best practice is to make this at least eight digits long. Making it the user's extension number is just begging for trouble; these accounts are in the cloud, and everyone in the world can access the login screen from a browser. Help keep your users safe and educate them on the need not only to create good passwords but also change them periodically — and this starts with your selecting the user's initial password.

3. Now, select Add User at the bottom to create the initial user account.

At this point, you can go through and create the initial set of user account as in the following screen:

nager Portal - Users	+						
https://my2.svlab.esihs.ne	t/portal/users/index/page:1/	/sort:extension/direction:asc		☆ マ C 🛛 🗧 - Google	م		4
st Visited 🗍 Getting Started							
	You are mana	iging Deathstar Commur	ications System (Deat	hstar.mil). View all domair	ıs.		
esi We Make It Easy To C	ommunicate			Emp	orer Palpatine palpati	ne 🕞	
A Home	Lusers	& Conferences	Call Queues	Inventory	🗱 Settings	?)
Users						0	;
Enter name, extension, o	or dept. Q				Import	Add User	
Name		Extension -	Department				
Darth Vader		1000	Siths		0 💼		
Darth Maul - Decease	d	1001	Siths		0 💼		
Darth Tyranus - Dece	ased	1002	Siths		0 💼		
Storm Trooper 1		2000	Storm Troopers		0 💼		
Storm Trooper 2		2001	Storm Troopers		0 💼		
Storm Trooper 3		2002	Storm Troopers		0 💼		
Grand Moff Tarkin		3000	Commanders		0 🖻		
		"ESI H	osted Services, LLC."				

Once all users are created, click the name of a user for a more detailed configuration screen:



There are four tabs: Profile, Answering Rules, Voicemail, and Phones.



For each user, follow the steps described on pages 11–17.

Step 1: Setting the user's profile information

On the **Profile** tab, make sure to set the user's **Timezone**. This governs when various time frame rules take effect. This defaults to the domain's time zone, so it should be correct for most users. For a remote user in a different zone, set in **Timezone** what is appropriate for that user. Different time frame rules may be needed for remote users (remember that Premier users can create their own rules).

efox V	damage and		
https://mv2.svlab.esibs.net/nort:	+ //users/edit/orofile/000@Deathstar mil	ionale P	L.
st Visited 🗍 Getting Started			Ť
	You are managing Deathstar Communications System (Deathstar mil). View all de	omains.	
Profile Answering Rules	Voicemail Phones		
Profile Information			
First Name	Darth		
LastName	Vader		
Login Namo	1000@Deathetar.mil		
Login Name			
Department	Siths		
Timezone	US/Central		
Email Address(es)	darth.vader@galacticempire.gov		
Directory Options	Announce in Audio Directory List in Directory		
Caller ID Information	Ectimology		
Area Code	666		
Caller ID	6665551212		
911 Caller ID	6665551212		
Dial Planning			
Dial Permission	US and Canada Only		
		Contacts	_1

Some user profile options

- Announce in Audio Directory Allows this person to be reachable through the company audio directory, which is accessible through the auto attendant. This is a dial-by-name directory in which callers enter the first three letters of the user's last name.
- List in Directory Shows this user in other users' Contacts lists. Includes presence status.
- Dial Permission Selects the correct dialing permission, based on the seat type chosen. If the seat is a Shared seat, choose Domain Only. For all other seats, choose US and Canada Only. If an international waiver has been signed by the end customer, choose an international calling option.

Make no changes to the **Password** section; this was already set from the initial creation. However, this is where a Reseller or Office Administrator can change a current user's password — such as for the Shared seat, which has no portal account.

Step 2: Setting answering rules

Answering rules are used to define now calls are delivered to a user's phone, as well as define what routing to take in exception cases, such as if the user is busy. Select the **Answering Rules** tab. There is always a default rule with a rule of **Ring x**[the user's extension].

Users / Darth Vader (1000)						
Profile Answering Rules	Voicemail	Phones				
Ring for 25 💽 seconds						
Time Frame			Description			
Default Active			Ring x1000			

To add a new rule, select Add Rule, which will bring up a dialog with your choices:

Time Frame	Storm Trooper 1st Shift	
	This is when your answ	vering rule will apply
	Enabled	
	Do not disturb	
	Call screening	
Call Forwarding	Always	Enter an extension or phone number
	🔽 When busy	User - 3000 (Grand Moff Tarkin)
	📄 When unanswered	Enter an extension or phone number
	When offline	Enter an extension or phone number
	Simultaneous ring	Include user's extension
		Ring all user's phones
		Enter an extension or phone number
	👿 Just ring user's extens	sion
You	nust first set up a timefra	ame before adding a new rule.
Click the Tir	neframe button at the to	p of the screen to create a timeframe.

Use the drop-down list to select the time frame to which you want to apply a special rule. For most users, the base default rule will be all that is ever set; but, for an executive, you may want to change the **When busy** rule to send the call to his/her assistant. A Premier user may have multiple devices on his/her account — in which case you can set up the **Simultaneous ring** option, additionally checking **Ring all user's phones** (**Include user's extension** is a default), and then any calls to this person's extension will ring all his/her devices. You could also enter a mobile phone number of another extension.

Click Save to save your new rule.

Drag the default rule (below the **Business Hours** rule) to the top by clicking and dragging the double arrow on the left-hand side; then click **Save** to save the new order.

	Time Frame	Description	
*	Storm Trooper 1st Shift	Forward when busy to User - 3000 (Grand Moff Tarkin)	Ø 💼
\$	Default Active	Ring x1000	

To create an answering rule for the do-not-disturb time frame, select **Add Rule**, select the do-not-disturbtype time frame from the drop-down menu, and selecting the **Do not disturb** check box. Click **Save**.

Time Frame	Vaders Nap Time	
	Select a time frame Droid Maintenance Storm Trooper 1st Shift (Vaders Nap Time	apply in use)
	Do not disturb	
	Call screening	
Call Forwarding	Always	
	When busy	
	🗌 When unanswered	
	When offline	
	Simultaneous ring	☑ Include user's extension
		Ring all user's phones
		Enter an extension or phone number
	📃 Just ring user's exten	sion
You r Click the Tir	nust first set up a timefr neframe button at the to	ame before adding a new rule. op of the screen to create a timeframe.
		Canaal

The user account should now have three rules: a business hours rule (active when within the business hours time frame), a default rule, and a do-not-disturb answering rule:

Firefox *				
Manager Portal - Users +				
← ▲ https://my2.svlab.esihs.net/portal/answerrules/index/1000@De	athstar.mil	☆ マ C 🛿 🗧 Google	₽ 🖬 🕂 🕯	ĩ
Most Visited Getting Started				
You are managing De	athstar Communications System (Deaths	tar.mil). View all domains.		Î
esi) We Make It Easy To Communicate		Emporer Palpatine	alpatine 🕨	
A Home & Users &	Conferences Call Queues	Inventory	0	
Users / Darth Vader (1000)			C	
Profile Answering Rules Voicemail Phones				
Ring for 25 💌 seconds		Allow / Bloc	k Add Rule	
Time Frame	Description			
Storm Trooper 1st Shift Active	Forward when busy to User - 3000 (Grand Moff	Tarkin)	/ 💼	
Default	Ring x1000		0	Ξ
◆ Vaders Nap Time	Do not disturb			
When no answerin Calls will b To change the priority, us	g rules are in effect, calls will ring your (handled according to your prioritization e your mouse to drag and drop the rule	extension by default. n of the rules. s into your preferred or <mark>Contacts</mark>	*	Ŧ

If this user should have a different rule applied for after hours, then create an answering rule for the afterhours time frame, select the desired options, slide that rule after the business hours rule, and click **Save**.

Answering rules are processed from the top of the list down. One processing hits an "always" rule, it won't process any other rules below that. So, in the above example, the first rule shows **Active**. Once that time frame no longer matches the current time, the next applicable rule will become the active one; in this case, that's the default rule.

If you create a vacation rule, it would need to be the top rule in the list. It won't be applicable until the day of vacation but, on that particular day, it needs to be processed ahead of all other rules so it never "falls through" to the business hours rule or any default rules.

Step 3: Setting voice mail options

After selecting Voicemail, make sure the Enable Voicemail box is checked (by default, it should be).

Firefox T						= ×
🐻 Manager Portal - Users	+					
https://my2.svlab.esihs.net/porta	l/users/edit/voicemail/1000@Deathstar.mil		☆ マ C 8 -	Google 🔎	•	•
Most Visited Getting Started						
	You are managing Deathstar Communi	cations System (Deat	h <mark>star.mil).</mark> View all d	omains.		
esi) We Make It Easy To Communic	ate			Emporer Palpatine palpatine	₽	
A Home	Users & Conferences	Call Queues	Inventory	to Settings	?	
Users / Darth Vader (10	00)				C	
Profile Answering Pules	Voicemail Phones					
	Enable Voicemail					
Inbox						
						- E
Options	Sort voicemail inbox by latest first					
	Announce voicemail received time					
	Announce incoming call ID					
Number of Messages	0 Clear messages					
Data						
Limit	Unlimited					
Limit	Oninnited					
Used	0.0 MB Clear data					
Greetings						
Voicemail Greeting)				
Recorded Name						
Unified Measuring				Contacts		-^ -

For the **Inbox** options, you can enable those options here if the customer has already indicated he/she wants any of these options; but, usually, it's just best to leave this up to the end user, who can log in with his/her own dashboard account and configure these options as desired.

End users do not have the **Clear messages** selection. You would use this feature if this extension were being re-assigned to another user. To re-assign, change the account's **First Name** and **Last Name** settings. (The extension number itself cannot be changed.)

Data limit is also available only to the Reseller. Select **Clear data** if you're re-assigning this account want to clear out all data (voice mail messages, greetings, *etc.*) from the account's previous owner.

Each users record his/her own greetings and name recordings using his/her phone or portal account, and will be prompted to do so the first time he/she calls into voice mail.

Unified messaging can be set on accounts where the user may not have access to this setting. In order for the user to employ this feature, a valid e-mail address must have been entered for the user in the **Profile** settings. Select any of these options to have the voicemail sent as an attachment to an email. Premier users can change these settings to their preferred settings. For example, a user who always prefers to get voice mails in his/her e-mail account can select **Send w/attachment (move to trash)** to have the message sent and then automatically moved to the user's trash folder.



Step 4: Setting phone options

A default phone device is created when the user account is created with a default **Manual or Softphone** model type.

If you have an ESI phone, or an ESI Ditto Android or iOS client, this is where you will set up those phones.

For any other phone model, just click the **Edit** icon and a dialog box will show you the credentials needed to connect any SIP phone to this account in the **Settings** field:

Edit Phone		20
Phone Name	1000	
	Note: Phone Name cannot be changed	
Record Calls	No	
Model	Manual or Softphone	
Settings	Domain/Proxy: Deathstar.mil Outbound Proxy: nms-s3.sv.epo01.esihs.net:506 0 Username: 1000 Paseword: edeYeav2	
	Cancel Save	

For an ESI phone, select the phone model from the drop-down list. Enter the phone's **MAC address**, with no colons separating the numbers. For example, the MAC address *01:02:03:04:05:06* should be entered as **010203040506**. Then, set the phone's **line number**; this should always be line 1. The ESI phones use no other number.

Phone Name	1000
	Note: Phone Name cannot be changed
Record Calls	No
Model	ESI 45
MAC Address	00304d01fffd
Line number on Phone	1

Click **Save**. The phone will now show in **Inventory** for the domain under the **Phone Hardware** tab as well as on this screen.

Registered	d Device Name	Device Type	IP Address	MAC Address	Line	
\times	1000	ESI 45		00:30:4D:01:FF:FD	1	0 🖬

The phone shipped for this user is enabled to auto-provision to the service. Just plug the phone into a PoE network switch, and the phone should reach out to the provisioning server, get its configuration for this extension number and phone type, and do any firmware updates. When done correctly, the **Registered** field in this screen should change from an "X" to a checkmark (\checkmark) and the phone should show the user's name on the phone's display. This may take a few minutes, depending on whether new firmware needs to be loaded.

For always-on call recording, click **Edit** to bring up the **Edit Phone** dialog. In the **Record Calls** drop-down menu, select **Yes**; now, all calls made to or from this device will be recorded. (If the customer hasn't yet purchased the call logging feature, it will later be added to the customer's bill.)

Note: Do not select this option if you want only the call-by-call recording feature for Premier users, as that is **already** included in the seat type. The phone included with the Premier account has a separate **RECORD** key. Select users would not be able to make call recordings.

Continue to provision and set up the phones for any additional users, following the steps outlined in this section. Once this process is completed, all the accounts should be able to call into voice mail as well as call each other.

Configuring conferences

To set up a conference bridge, click **Conferences**. This is where you will set up corporate or shared conference bridges and the personal conference bridge that comes with the Premier seats.

Premier conference bridges

For each Premier user that gets a personal bridge, click **Add Conference**. Fill out the options for this user, as shown in the screen below:

Add a Conference			×
Name	Darths Dark S	Side Bridge	
Owner	1000 (Darth '	Note: Owner cannot be changed	
Leader PIN	2187		
Participant PIN	5678		
Minimum participants to start	2		
Options	Require a	Leader to start	
	 Prompt all Announce 	participants for their name participant arrivals/departures	
		Cancel	Save

The **Name** for the bridge can be any descriptive name you would like. Since this is a personal bridge, we suggest you use the user's name in the bridge name so the description will make it obvious to whom the bridge belongs. The **Owner** list will start populating as soon as you start typing the extension number. Choose the user account from the list.

Set some default leader and participant PINs. The Premier user can manage his/her own bridge, and thus has the option to change the PINs. Set the **Minimum participants to start** quantity to **2** (since there is no point in engaging the bridge with only one participant has called in).

Always check **Require a Leader to start**; this will prevent users who previously knew the Participant PIN from calling into the bridge and using it without the leader's being available. Remember that there are additional per-minute charges for anyone calling into the bridge, so allow the bridge to be used only when the leader is present.

The Premier user can set the Prompt and Announce options based on personal preferences.

Click Save to create the bridge.

At this point, create any personal conference bridges.

Users can record a personal conference bridge greeting that will be played to anyone calling a DID pointed at the bridge. A user can set this up by calling his/her voice mail extension and going into the greetings menu to record the personal greeting. Record greeting number 4, which will be picked up for use with the bridge.

To set up a corporate/shared conference bridge, first create a user account. This user account will be used only with this bridge, not as a general user seat; this allows someone to log into the dashboard and manage the bridge. Just create a Premier user account (see "Creating user accounts," page 9). Don't set up a phone device for this user; however, do enable voice mail, as that will allow you to create a personal greeting for this bridge, as well. Next, edit the **Profile** options and uncheck the **Announce in Audio Directory** setting. Select the **List In Directory** option if you want this bridge to show in user's contact lists. Leave the answering rule as **Default** and don't set up a phone device (this will be the conference bridge).

First Name	Death		
Last Name	Star Constr	uction Bridge	
Extension	6000	Note: Cannot be chang	leq
Department			
User's Scope	Premier U	ser 💽	
Email Address(es)	deathsbridg	ge@deathstar.mil	•
	Enable V Add Photo	'oicemail ne Extension	
New Password	****		
	Note: Pass	sword must be numbers on	ly.
Confirm New Password			

Next, click Conferences and select Add Conference. Create the new bridge, as in the following example:

Name Death Star Construction Bridge Owner 6000 (Death Leader PIN 1234 Participant PIN 5678 linimum participants to start 2	
Owner 6000 (Death Note: Owner cannot be changed Leader PIN 1234 Participant PIN 5678 linimum participants to start 2	
Leader PIN 1234 Participant PIN 5678 Alinimum participants to start 2	
Participant PIN 5678 Alinimum participants to start 2	
Alinimum participants to start	
Options 🛛 Require a Leader to start	
 Prompt all participants for their name Announce participant arrivals/departures 	

Click **Save** to create the bridge. Again, these options are the same as you would set for the Premier conference bridges.

To call into a bridge, you can dial **0026000** (in this example) to reach the bridge directly. The same is true for the Premier conference bridges since, if you call the Premier user's extension, you will just reach that user's extension. The **002** prepended to the number allows you to reach the user's bridge internally without calling through a DID. Later, you can point a DID at the bridge so users outside the company can reach it.

Configuring call queues

Call queues can be used for a variety of features in the ESI Cloud PBX platform. This section will walk you through setting up these queues.

Call-park queues

A **call-park queue** essentially creates a queue of one to place a caller on domain-wide hold, so that any user in the company can pick up that caller. To create a call-park queue, click **Call Queues** and then **Add Call Queue**. Create a call-park queue as shown here:

Name	Force Queue - 10		
Extension	10	New	
	Note: Extension cannot be changed		
Туре	Call Park		

Click Add to create the queue.

Create additional call-park queues here. The valid range for extensions for call-park queues is 10–29 on the production system. These are the only things that require a fixed extension range. Create only as many call-park queues as the customer would ever have on domain hold.

When you're creating queues, the extensions don't exist yet, so the display will indicate **New** next to the extension. Go to **Users**, and you will see that the call-park queue name is now shown as a user account with the chosen extension. Click this to edit the user account.

Firefox 🔻								x
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esi) We Make It Easy To Commun	icate				Emporer Palpatine palpatin	ie 🕑		
A Home	Users	& Conferences	Call Queues	Inventory	🕵 Settings	?		
Users / Force Queue -	10 (10)					C		
Drofile Anomarian Dalas	Vaiannail Dha							
Frome Answering Rules	voicemail Prio	nes						
Profile Information								
First Name	Force							
Last Name	Queue - 10							
Login Name	10@Deathstar.mil							
Department								
Timezone	US/Central	•						
Email Address(es)	theforceisstrong@de	athstar mil)					
Directory Options	Announce in Audio	o Directory						
	List in Directory							
Caller ID Information								
Area Code	666							
Caller ID	6665551212					_		
911 Caller ID	6665551212	-			Contacts		_ ^	

In the first **Profile** screen, most options are pre-filled, as usual. The only option to consider selecting is the **List in Directory** option; check this if you want the contact presence status indications in end users' dashboards to show the status of this call-park queue. Busy lamps could also be configured for these accounts so that users can see if any queues are available to park a call or if someone is still holding in a parked queue.

Although an e-mail address is required for each user account, the e-mail address doesn't have to exist (no UM options will be enabled for this account); so just enter something and click **Save**.

The **Ring for** [x] **seconds** setting on a call-park queue will control how long someone remains in the queue before the original user who parked the call is called back as a gentle reminder. Once this timeout is exceeded, the original user is called and presented an option to retrieve the call. If this doesn't occur, the user will be called again after this same timeout period.

Phones will never be configured on queues, so leave the **Phones** tab empty. Create any additional call-park queues that are desired.

Ring-all queues

Ring-all queues are a useful feature for creating various ring groups. The first person in a ring-all queue who answers his/her phone gets the call; additional calls to this queue will ring any of the remaining extensions. This queue type is frequently used in retail, small offices, or department sections.

To create a ring-all queue, click Add Call Queue and fill out something similar to what appears below:

Add a Call Queue				×
Name	Security Ford	e		
Extension	4000		New	
	Note: Extens	sion cannot be cha	nged	
Туре	Ring All		•	
Run Statistics	No 💌			
Agent Ring Timeout (sec)				
Agents to Ring Initially		2	90	
Agents to Add After Timeout	limited	5	10	
Max Time (min)				
Ur	limited	50	99	
Expected wax wait (sec)	limited	500	1000	
Max Queue Length	limited	50) 99	
			Cancel	٨dd

The name of the queue can be anything. Remember that a user account will also be created with this same name. When you select **Ring All** from the **Type** drop down, more options will appear.

Set **Run Statistics** to **No**, as this is applicable only to standard, ACD-type queues (see "Standard queues," page 26).

The next few options all act in conjunction with each other. If you just want all users' phones to ring, leave **Agents to Ring Initially** at **Unlimited**. The agents (extensions) will be added in a bit. Through these settings, different numbers of phones can ring initially with additional ones added at intervals to create an escalation.

The **Max Time** and **Max Queue Length** settings can be used to set how long a user will remain in the ring-all queue. However, since this is not really an ACD-type queue, these options can just be left at their defaults.

Click Add.

Because a user account is created, there is actually another timer that is running on the queue account. To change this, go to **Users** and select the user that has this queue name. Click the **Answering Rules** tab and then decide on a **Rings for** value. The default is the same as for regular user accounts.

Now, a user calling the queue will hear music-on-hold for the time period set, and then will be presented with a menu option either to stay on the line or leave a voice mail message.

You probably should also set up voice mail for this user. Click the **Profile** tab and enter a valid e-mail address. Since this is a queue, the email address could be some alias e-mail that's been set up on the customer's e-mail system that broadcasts to selected users; or you can just enter multiple e-mail addresses here.

Click Save at the bottom.

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🔊 Most Visited 🗍 Getting Started								
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	00010		• Can daddoo		App County	•		
Users / Security Force	(4000)					C		
Profile Answering Rules	Voicemail Phones	3						
Profile Information								H
First Name	Security							
Last Name	Force							
Lagia Nama	4000@Doathstar.mil							
Login Name	4000@Deatristal.iiii							
Department								
		_						
Timezone	US/Central	•						
Email Address(es)	stormtrooper1@kaming	.com						
	stormtrooper?@kaming	com 🛇						
	stormtrooperz@kamine							
	stormtrooper3@kamind	o.com						
Directory Options	Announce in Audio D	irectory						
	List in Directory							
Caller ID Information								
Galler 12 Information								
Area Code	666				Contacts		_ *	-

Now go to the **Voicemail** tab and select a UM option. Since it's likely that no one will be managing this account, choose the **Send w/attachment (move to trash)** option; this will make the account self-cleaning. Remember to record and upload a greeting on the voice mail settings for this user account; otherwise, callers will hear only the default greeting.

Click **Save** at the bottom.

Now that the queue is set up, you need to add some agents (extensions) to the queue. To add agents, go

back to the Call Queues page, select the ring-all queue you just added, and select the Edit Agents icon.

Name 🔺	Owner	Туре	Callers in Queue	Agents (Available)	
Force Queue - 10	10	Call Park	0		/ 🗇
Force Queue - 11	11	Call Park	0	2	Edit Agents 📅
Security Force	4000	Ring All	0	0 (0)	¥ / 💼

Edit Agents in Security Force Agent Phone 2000 (Storm Trooper 1) Online • Status Note: Changing Status may take a moment to update Wrap up time (sec) 300 595 Max Simultaneous Calls Queue priority for agent 1 • Request Confirmation Auto Answer There are no agents assigned yet. Add Agent Done

When you first click Edit Agents, the list of agents will be empty:

Click Add Agent at the bottom of the box. A list of options will expand down from the top.

Most of the options are not relevant for a ring-all queue, so just leave them at their defaults. You definitely **should not** check **Auto Answer** — the queue will send out calls to all phones so, if you request all the phones to auto-answer it will be a race as to which one replies first.

Click Save.

Continue to add additional extensions to the queue. Select **Done** when finished.

The **Agents (Available)** status should indicate the number of users, and how many are available, for this queue. If the phone is offline, in DND mode, or busy, the user won't be available for the queue.

Standard queues

Standard queues (ACD-type queues) can be configured as either round-robin or linear:

- A round-robin queue starts by calling the first agent in the queue. If that agent doesn't answer within the timeout period, the next agent in the queue gets the call, and so on until an agent answers.
- With a linear queue, an available agent with the lowest priority number gets the call first. If multiple agents
 are at that same level, that group of agents will hunt between them until they are all busy. Then, the next
 higher order agent group will ring. This allows the customer to keep his/her best agents in one group and
 keep them busy.

To create a round-robin or linear queue, click Call Queues and select Add Call Queue.

Create a linear queue as in the following:

Name	Rat On A Rel	bel Hotline		
Extension	4100		New	
	Note: Extens	sion cannot be chan	ged	
Туре	Linear			
Run Statistics	Yes 💌			
Agent Ring Timeout (sec)				
Agents to Ring Initially		F	10	
Agents to Add After Timeout	Unlimited	5	10	
Max Time (min)				
	Unlimited	50	99	
Expected Max Wait (sec)	Unlimited	500	1000	
Max Queue Length		20		

The dialog box will further expand with additional options. For **Run Statistics**, go ahead and choose **Yes**. Linear queues have the same group of options for creating escalations as a ring-all queue (refer to "Ring-all queues," page 23, for a description).

Click Add. The list will update and show the new queue.

As is true for a ring-all queue, in a linear queue you can have callers time-out of the queue and go to voice mail. Set up the user account that was created for this queue, enter one or more valid e-mail addresses, turn on the UM options, and upload a greeting — just as instructed for a ring-all queue. In **Answering Rules**, set the **Rings for** to **unlimited**. If you want a max time on the queue, click the queue name again to edit it and use the **Max Time** slider to adjust how long callers can stay in the queue before they are presented with an option to leave a voice mail message. There are other options, as well, but those will be explored in more advanced material.

Create any additional round-robin or linear queues as needed.

Adding agents to the queue is done in the same way as with the ring-all queue.

<u>99</u>

ttnes//mu2 culab acibs nat/	nortal/callguoues						0 6.
sited Getting Started	portal/caliqueues						
sited () octaing statica							
	You are mar	laging Dea	thstar Commun	ications system (Deaths	tar.mii). View ali domai	ns.	
We Make It Easy To Con	nmunicate				Emp	oorer Palpatine palp	atine
A Home	10 Lisers	0	Conferences	Call Queues		rts. Settings	(
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Call Queues							
						Ad	d Call Que
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Farce Queue 10	1	wner n	Coll Park	Callers in Queue	Agents (A)	/allable)	17 1
Force Queue - 11	11	1	Call Park	0		E	dit Agents
Rat On A Rebel Hotline	e 4'	100	Linear	0	0 (0))	4 / f
Security Force	40	000	Ring All	0	3 (0)	2 / f

In the **Edit Agents** dialog, select **Add Agent** at the bottom right. Further options will expand in the dialog box. Since this is an ACD-type queue, the other options are valid.

Agent Phone	3000 (Grand Moff Tarkin)	
Status	Online	
Wrap up time (sec) Max Simultaneous Calls	20 e: Changing Status may take a moment to upd	ate
Order in Linear Hunt Queue priority for agent		
	Request Confirmation	Save
	There are no agents assigned yet.	

The Status can be set to Online to have this agent always available for a call.

A key can be programmed on the agent's phone for logging into and out of queues.

An agent can also have auto-wrap time (**Wrap up time**) that will take him/her out of the queue for the specified time period before putting the agent back in the queue.

Leave the Max Simultaneous Calls setting at 1.

The **Order in Linear Hunt** setting allows you to group agents as noted before. Order "1" agents get the calls first, so enter the agent's priority in this queue. Any agent can be in multiple queues. This allows for some skills-based routing ability.

Leave **Request Confirmation** unchecked for agents that are on the domain; but, if the agent is remote (meaning, you entered a 10-digit number in the **Agent Phone** field), then set this to **Yes**. This will play a prompt to the agent so he/she can confirm the taking of the call. Check **Auto Answer** if you want the agent's phone to auto-answer — *e.g.*, if the agent has a headset.

Click Save.

Configuring auto attendants

You can create a default **auto attendant** or create one for use in a specific time frame. If you want separate auto attendants for business hours and after hours, use the specific time frame (but create them both on the same extension). Choose the same extension each time, selecting a different time frame from the drop-down menu. The system is set up to support dialing extension **0** if you want the main auto attendant number to be something easy to remember, but it could be on any valid 3-or 4-digit extension. A DID can also be pointed at this auto attendant.

Auto attendant prompts can be recorded ahead of time and uploaded by either the installing Reseller or by an Office Administrator account. The Reseller can only upload the prompts to the auto attendant, because the Reseller account has no calling privileges on the customer's account. However, the Office Administrator can use the **Call** option as well as the **Upload** option.



To create an auto attendant, click Settings, then Auto Attendant.

Click Add Attendant and, in the resulting display, enter something like the following:

Add an Auto Attenda	int ×	
Name	1st Shift AA	
Extension	0 New Note: Extension cannot be changed	
Time Frame	Storm Trooper 1st Shift	
	Cancel Continue	

Again, you can just choose **Default** in **Time Frame** if you want this auto attendant to be the only one. If you want an auto attendant with different prompts and different options during each time frame, select a Time Frame. Choose an extension. As is true for creating a queue, adding an auto attendant creates a user account.

Select Continue.

In the Auto Attendants screen, select the Manage icon (a speaker) next to the introductory greeting box.

Extension	Manage	
Intro Greetings	٢	

This will bring up the Manage Greetings dialog box.

Enter **Introductory Greeting** as the description. Click **Upload**, then click **Browse**, and locate the introductory greeting prompt you want to use. The customer can re-record a prompt of his/her own at any time.

New Greeting	Upload	
	Record	
Browse	Incomprehensible R2-D2.wav	
Time Frame	Select a time frame	
	l.	lpload
Time Frame	Duration	

In the Menu Prompt area, select the speaker icon.

Me	nu Prompt	
	Click to add a new menu prompt	

This will bring up the Manage Audio dialog box.

Enter Main Menu as the Description. Click Upload, then Browse, and locate the desired main menu prompt.

Manage Audio			×
Description	Main Menu	.::	
New Greeting	 Upload Record 		
Browse	C-3PO Ramblings.wav		
		Cancel	Upload
licking the Options bu	tton brings up the Optior	ns dialog box.	
Options			×
	Enable Dial by Extension		
If no key is pressed	Repeat the greeting prompt		
lf unassigned key is pressed	Repeat the greeting prompt		
			Done

Enable Dial By Extension is enabled by default. If the end customer doesn't want this option, uncheck the box. Leave the **If no key is pressed** and **If unassigned key is pressed** settings at the default setting for each, which is **Repeat the greeting prompt**.

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Manager Portal - Auto Attendants +	All and a second se					
← ▲ https://my2.svlab.esihs.net/portal/attendants/edit			☆ マ C 🛛 🗧 - Google	٩	1	↓ ♠
Most Visited Getting Started						
You are managir	g Deathstar Communi	cations System (Death	star.mil). View all domai	ns.		
esi) We Make It Easy To Communicate			Emp	porer Palpatine palpatine	₽	
A Home	& Conferences	E Call Queues	Inventory	🚓 Settings	7	
Auto Attendants					S	
Auto Attendant Name 1st Shift AA						
Extension						
Intro Greetings						-
Menu Prompt	Choose Applic	Dial Pad	Menu			
Main Menu 🕞 🕥	Ó			*) Options		E
		00000				
Choose a new application:	User Conference C	all Queue Directory Voicer	nail Voicemail Management Number	Play Message Prompt Add	Tier	
Save	Cancel					
				Contacts		- * .

Programming the auto attendant options is very simple.

To configure an option, just click the **Dial Pad Menu** number you want to set. A list of applications to which you can route will be shown, as in the example above:

If you want this option to	Choose
Go to a specific user	User
Go to a specific conference bridge	Conference
Go to a specific call queue	Call Queue
Go to the company audio directory	Directory
Go to a user's voice mailbox (such as a guest mailbox)	Voicemail
Route to an external number	External Number
Repeat the main menu prompt	Repeat Prompt

Additionally . . .

- If you want your users to be able to access voice mail from outside the company, choose Voicemail Management.
- If you want to provide instructional information, choose **Play Message** and upload a prompt.
- If you want a second tier of auto attendant options, choose Add Tier. Only two tiers can be supported through the UI; but you could select User and route to another auto attendant extension.
 If you add a tier, record a prompt for the second tier menu, too.

Firefox *				_ - X
Manager Portal - Auto Attendants +	ALC: NO.			
A https://my2.svlab.esihs.net/portal/attendant	s/edit	☆ <i>⊽</i> C	8 - Google ₽	
Most Visited Getting Started				
You are	e managing Deathstar Communi	cations System (Deathstar.mil). Vio	ew all domains.	
est We Make It Easy To Communicate			Emporer Palpatine palpatine	Ð
A Home	& Conferences	Call Queues	ory 🎎 Settings	0
Auto Attendants				C
Auto Attendant Name 1st Shift	AA			
Extension 0				
Intro Greetings 🕥				
Menu Prompt		Dial Pad Menu		
Main Menu		$\binom{\text{ABC}}{2}$ $\binom{\text{DEF}}{4}$ $\binom{\text{GHI}}{5}$ $\binom{\text{MNC}}{6}$ $\binom{\text{DRS}}{7}$ $\binom{\text{TUV}}{8}$	Options	E
	٩	* •••• 🖅 🚥 🗠 🍳 🗭	+ £	
Menu Prompt		Dial Pad Menu		×
Click to add a new menu prompt		2 3 4 5 6 7 8	Options	-
Choose a new application:	User Conference C	all Queue Directory Voicemail Manageme	i External Play Repeat Pre	evious Aenu
s	Cancel			
			Contacts	_* .

When done, click Save.

At this point, you can create additional auto attendants.

Configuring music on hold

Next, upload any music files the end user wants to use for music on hold.

Important: Make sure the end user understands copyright ownership rules, since copyrights allow music for **personal** use but **not** for business functions such as music on hold.

To add music on hold, select Settings, then Music On Hold.

🚓 Settings	?
🕻 Auto Attendants	
Time Frames	
🞵 Music On Hold	

The **Add Music** dialog box will appear. Click **Browse** to find any music files. Supported file formats are *.wav* and *.mp3*. In the **Song Name** field, enter a description for the music file, as in this example:

	Browse Light Saber	3V
Song Name Yo Yo Light Saber	Song Name Yo Yo Light S	

Click Upload. You can upload additional files in the same way.

For added convenience, music files can be ordered into a **playlist**. Just click and drag the double arrow on the left and reorder the list, as in this example:

		Song Name	Duration	Filesize	
A V	۲	Squashing Rebels - Vader and the Kamino Philharmonic Orchestra	0:18	137.45 KB	± / 🛍 _
\$		Yo Yo Light Saber	0:18	137.45 KB	± / 💼

Additionally, clicking **Settings** will give you an option to **randomize** the list of music files. You can also add an introductory greeting for promotional offerings or any other message.

Music on Hold Settin	igs		×
	Enable Music on Hold Randomize Music on Hold		
New Greeting	 Play introductory greeting Upload Record 		
Greeting Name			
		Cancel	Save

Another included capability is adding different music on hold to the call queues or, for that matter, any (other) extension. Enter the extension in the search field ("Find a user's music").

Music On Hold		
4		Q
4000		
4100		
*		Squashing Rebels - Vader and
*	۲	Yo Yo Light Saber

This allows you to customize music on hold and greeting options for any extension, be it a user or queue.

Assigning DID and toll-free numbers

Once everything has been setup, the domain-assigned DID and toll-free numbers can be pointed at the correct user or application.

To point DID numbers, click Inventory. The Phone Numbers tab should appear as shown below:



All the DID numbers and toll-free numbers that were ordered should be in the list. Keep in mind that some of the numbers may not be ported yet and, therefore, can't be tested.

To assign a number, choose that number and select the Edit icon.

The Edit dialog will appear.

For Treatment . . .

- If assigning the number to a user, choose **User**, or choose one of the applications.
- For the main number in the list, choose **Auto Attendant**. An **Auto Attendant** box will appear. Enter **0** in the box and that auto attendant should appear in the list. In the **Notes** section, enter some notes text, such as "Main DID number to auto attendant." Then, click **Save**. The screen will update with the new information. Now, call the main number to make sure it calls the auto attendant.

Treatment	Auto Attendant
Auto Attendant	1st Shift AA (0)
Notes	Main DID number to AA

To assign a number to a queue, click the number and, in **Treatment**, choose **Call Queue**. Additional options will appear. The default will be **No Announcement**. Choose one of the other options if you want either the number of callers in the queue or the average expected wait time that was previously set.

Treatment	Call Queue	
Call Queue	4100 (Rat On A Rebel Hotline)	
Innouncement for callers:	 No announcement Announce number of callers in queue Announce average expected wait time 	
Notes	External Hotline Number	

Set up the other numbers to point to users or conferences, depending on each number's purpose.

Conclusion

Congratulations on getting your company built out! There are still many options that we will explore in a more advanced guide which is still under development at this time.

For example, with the main features working for the end user, additional customizations can be done. There is a lot of flexibility in the **Answer Rules** options to create some unique call-routing options. Also, if a queue timesout, you could have the caller forwarded to a different queue or forwarded to voice mail.

With the many DSS key options on ESI SIP phones, a user can have a key for the **Call Park** feature (including busy lamps on call-park queues), a private call key for sending out calls as "Anonymous," and just about anything else that requires a user account.

May the force be with you.

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