Welcome!

Thank you for choosing **ESI Cloud Services** for your business communications. We know that getting your new phone system up and running is crucial to your business. Here are a few quick tips to help you take advantage of the key features of your ESI phone.

• Make sure that you have your log-in information, in order to access and set up the Web-based dashboard.

• Access online tutorials and information when setting up your phone, for additional guidance.

• Check to make sure your desktop phone is registered to the network and ready for use.

ESI works closely with our clients to ensure you can easily get up and running with your new phone solution. We want to make sure that your transition goes as smoothly as possible, and that learning the key functionality of the system is easy and intuitive. Our commitment to ease-of-use, innovation, and quality of service is something we take pride in delivering.

What makes your ESI system unique?

ESI Cloud PBX blends the features of the ESI desk phone with our Web-based application to give you real-time visibility into your business communications.

ESI's unique system-to-phone integration ensures your Web-based dashboard and phone are in constant sync, with changes made to the dashboard instantly reflected on the phone and *vice versa*. We call this **ESI Intelitouch.**™ This seamless interaction enables you to use each device knowing that your status, customized keys, directory, and customized call routing are exactly the same. In addition, your ESI phone can be quickly programmed and personalized using the Web-based dashboard, removing the need to remember all those "star codes" for your favorite features. ESI makes communications easy to use and manage. So, let's get started!

Getting started

Logging in

1. In your Web browser, open a new window or tab. Supported browsers are *Chrome*, *Firefox*, and *Safari*.

2. Go to *my.esihs.net/portal* in the window or tab you opened in the previous step.

3. Enter your **USERNAME** and **PASSWORD** provided by your System Administrator.

4. To access the user dashboard, click **LOG IN**.

Voice mail and greeting setup

1. In the Web-based dashboard, click **Messages** and select the **Settings** tab.

2. Select your voice mail options (sorting order, notifications, and caller info).

3. Under **Greetings**, create a personalized greeting (by selecting the **Manage** icon to the right of **Voicemail Greeting**) or just record your name. You can either upload an existing greeting or record a new one.

4. When you're done, select the greeting from the drop-down menu.

To set this up **by phone** (rather than via the Web-based dashboard), press the phone's **VOICE MAIL** key, enter your password, and follow the prompts to record your name and greeting.

Creating custom answering rules

Note:	Only for users with Premier or Administrator access.

1. To create a personalized call-routing rule, click the **Answering Rules** icon.

2. Select **Add Rule**.

   Commonly used routing rules include forwarding calls to your home office when working from home, routing calls to another number when you are offline or out of the office, and routing calls to another employee when your line is busy.

   As an example, you can set the **Default** rule to simultaneously ring multiple phones or phone numbers.

3. To personalize the time frames for call routing, click the **Time Frames** icon. Click **Add Timeframe**, name the time frame, and select options to always use the rule or customize it for specific days of the week or ranges of dates; then create an answering rule (see Step 1) to use this new time frame.

Setting up audio conferencing

Note:	Only for users with Premier or Administrator access.

1. Click the **Conference** icon and select **Settings**.

2. Set a leader PIN, participant PIN, and the answering options for conference participants.

Obtaining help

There are three ways to quickly get help:

• Press your phone's **HELP** key.

• Click the help icon on your Web-based dashboard, choose from the various topics for assistance.

• Visit *support.esi-estech.com* to search the ESI Knowledge Base.

Key features of your ESI phone

Support for multiple phones — Manage up to three (3) devices per extension (Premier seat required), ensuring you will never miss another important call, no matter where you are, in the office or on the go.

Ability to customize phone feature keys — Your ESI phone can be quickly programmed and personalized using the Web-based dashboard, removing the need to remember all those "star codes" for your favorite features. Intuitive display messages prompt you as you program, guiding you through the process.

Personal Conference Bridge — With your ESI extension, you also have access to an on-demand conferencing bridge with a dedicated number and customized greeting. You can easily view conference participants, remove participants, mute, and create new leader and participant PIN codes — all within the Web-based dashboard. Offers two hours of conferencing for up to fifteen (15) participants.

Contact management — View and manage your contacts from the Web-based dashboard. Easily import contacts from Google™ Contacts, Microsoft® *Outlook*,® and Apple® vCard. Use the pop-out **Contacts** list to search for contacts or set a personalized status message.

Click-to-call — ESI makes one-touch calling simple. Click any number in the Web-based dashboard contacts list, call history, or voice mail; then, click **Call** in the resulting pop-up window, and you'll instantly be connected. To dial manually, use the Web-based dashboard's virtual dialpad to make the call.

Contact presence — View the availability of your co-workers in the company contact list (the colors of their icons indicate whether each is available, in Do-Not-Disturb mode, or offline). This helps you make the most of your time.

Mobility using *ESI Ditto*® — Use our mobile application, *ESI Ditto*, to appear as if you're calling from your office phone. Available on iOS and Android smartphones or tablets, *ESI Ditto* enables you never to miss another call anywhere, anytime. *ESI Ditto* utilizes WiFi and mobile data, instead of cellular minutes (carrier-dependent), for calls.

ESI getting started: Checklist

Here are 10 must-do items to make sure that your phone service is ready to go. Simply access the Web-based dashboard and **get started** customizing your phone service.

- ☐ Set up voice mail greeting *(All users)*
- ☐ Record name *(All users)*
- ☐ Set up time frames to receive and route calls *(Premier users)*
- ☐ Create answering rules to support your work schedule *(Premier users)*
- ☐ Set up your personal audio conferencing bridge *(Premier users)*
- ☐ Personalize your ESI phone keys for one-touch access *(Premier users)*
- ☐ Add new contacts to your directory to utilize click-to-call *(Premier users)*
- ☐ Set up multiple devices to ensure your calls are routed to you in or out of the office *(Premier users)*
- ☐ Download and set up the *ESI Ditto* mobility application *(Premier users)*
- ☐ Adjust answering rules to route to your preferred device *(Premier users)*
- ☐ Set up offline answering rules *(Premier users)*

User login information

Please use the login information below to access your new system:

User Name	
Extension #	
DID #	
User Login	
Password	
Conference Bridge #	

For Technical Support, please contact us at *support.esi-estech.com*, or call (866) 883-9777.

Frequently asked questions (FAQs)

Can I use 911 services with my ESI phone?

Yes; however, it is important to ensure that the 911 Caller ID number set in your Cloud PBX account profile has a valid registered address. This can be verified with the company that installed your service.

If my Internet connection is down for any reason, can I still use my ESI phone service?

No, your ESI phone service uses VoIP (Voice Over Internet Protocol) to provide your phone connectivity. If your Internet connection fails at any time, you will not be able to use your phone service. You can program an external phone number where calls can be sent if your ESI SIP phone goes offline. If you have multiple devices and can access the Internet through one of them, such as using the Web browser on a smartphone to reach the Internet through a cellular connection, you can quickly route your calls to your mobile (or any other phone number) to help you avoid missing calls.

Where do I go to find out more information on how to use my phone system?

To find out more information on how to use your phone system or set up specific features, click **Help** on your Web-based dashboard and it will quickly take you to the intuitive ESI user help guide. Should you require technical assistance, contact your local ESI Reseller.

What additional support can I access?

- Use your phone's **HELP** key or the Web-based dashboard. On the ESI 45SIP phone, the **HELP** key is a fixed feature key. On the ESI 30SIP phone, your ESI Reseller or your organization's System Administrator will assign the **Help** function to a programmable feature key.
- Visit *support.esi-estech.com* for online support, including video tutorials.

Getting Started with ESI Cloud Services