



Click-to-Call User's Guide

ESI Premises-Based Phone Systems

This document provides instructions on how to install and configure the Click to Call application.

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Introduction

ESI Click to Call is an application that helps bridge the gap between your ESI phone system and your PC, allowing you to dial a phone number from practically anywhere in Windows® through your ESI phone, as well as screen "pop" records from your CRM (Customer Relationship Management) based upon the Caller ID Number of incoming calls.

Features

ESI Click to Call features the following capabilities:

- Initiate outbound calls from your PC, including one-click dialing from Google Chrome™ and Mozilla Firefox® web browsers
- Automatically search for a customer record in your customer database, based on the Caller ID Number of an incoming call

Installation

In order to ensure a successful installation, the steps in the following topics should be followed carefully.

System Requirements

ESI System Requirements

ESI Click to Call is compatible with the following ESI phone system models:

- ESI eSIP 50x, 200x, and 500x models (eSIP 20x **not** supported)
- ESI Communications Server models (ESI-50L, ESI-50, ESI-100, ESI-200, ESI-600, ESI-1000)
- ESI IP Server 900

In order to use *ESI Click to Call* with the eSIP 50x, 200x, and 500x models, a single copy of *ESI Application Server* must be installed and configured on a PC at the site. *ESI Application Server* is licensed and installed separately.

In order to use *ESI Click to Call* with the ESI Communications Server phone systems or the ESI IP Server 900 phone system, *ESI VIP 7* or the IP Server 900 API must be installed on the PC where *ESI Click to Call* is installed (these applications are sold and installed separately).

PC Requirements

The following are the recommended minimum system requirements in order to install and run *ESI Click to Call*:

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

Note: Neither *VIP 7* nor the IP Server 900 API is compatible with a Terminal Services (Remote Desktop Services) or Citrix-type environment; therefore, *ESI Click to Call* is not compatible with these

environments when used in conjunction with an ESI Communications Server or ESI IP 900 Server phone system. However, *ESI Click to Call* **is** compatible with a Terminal Services (Remote Desktop Services) environment when used in conjunction with an ESI eSIP 50x, 200x, or 500x phone system.

Installation Preparation

It is recommended that, before attempting to install *ESI Click to Call*, you perform the following preparatory steps:

1. Update your PC with all recommended Microsoft Windows updates. You can begin this process by going to www.microsoftupdate.com.
2. Ensure that you have Administrator privileges on the local PC where you will install the software.

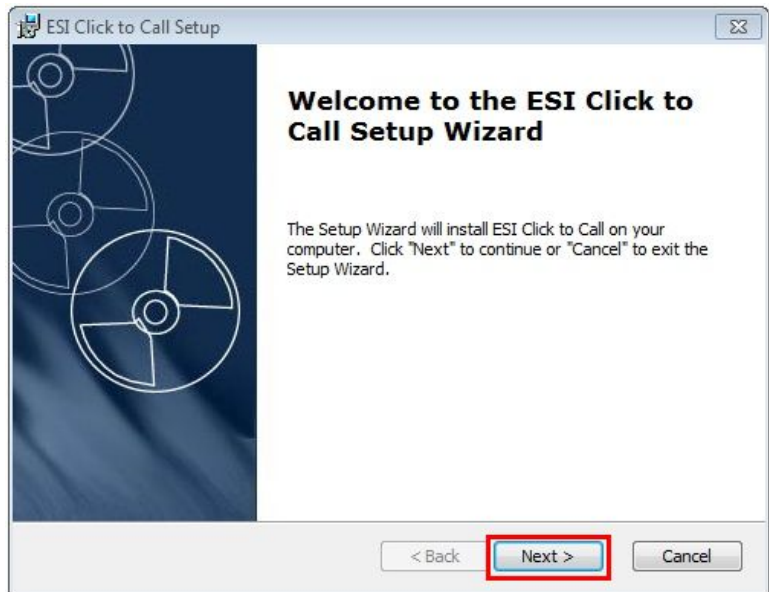
Installing ESI Click to Call

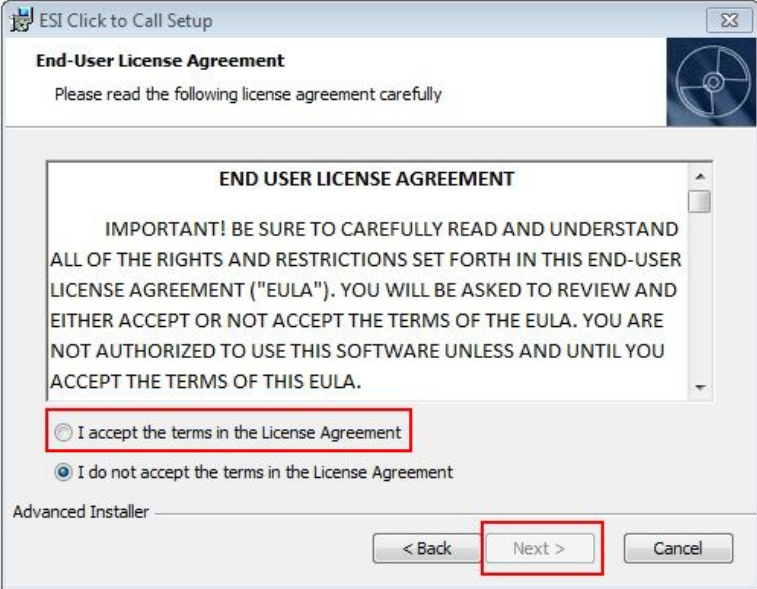
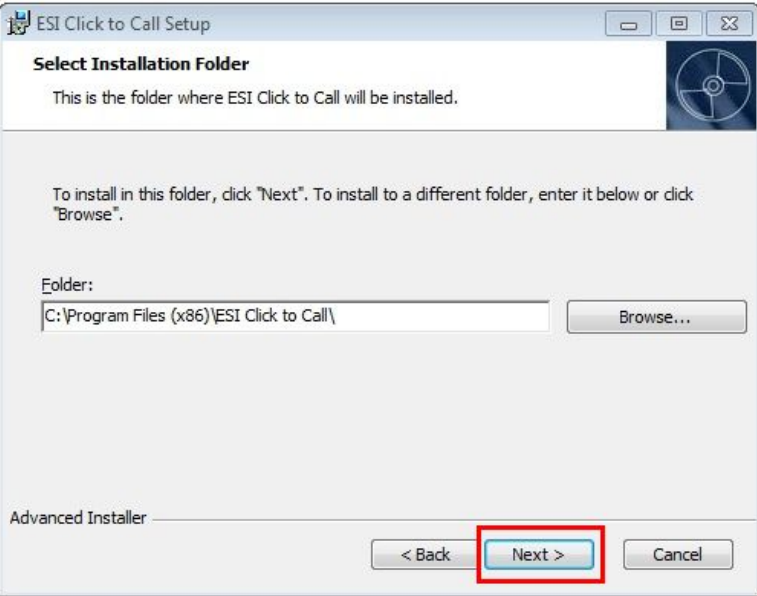
Please note: If your phone system type is an ESI Communications Server or IP Server 900, then before installing *ESI Click to Call*, you should first have installed either ESI *VIP 7* (sold separately), or the ESI IP Server 900 API. This is required for TAPI (Telephone Application Programming Interface) driver functionality. If your phone system type is an ESI eSIP 50x, 200x, or 500x, you should have first installed and configured *ESI Application Server* on a single PC at the site.

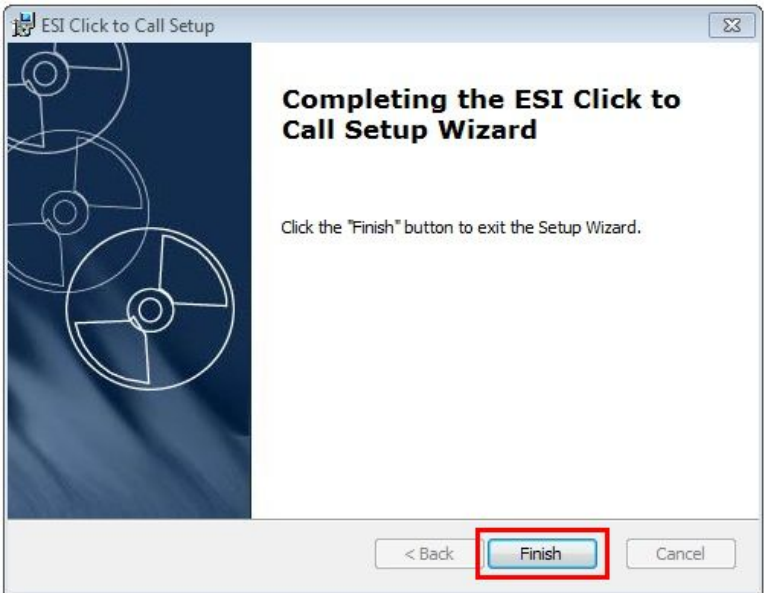
As of this writing, the latest version of *ESI Click to Call* can be obtained from the ESI Academy.

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 Click to Call* to run correctly, you will be prompted to install them. If so, install the updates and proceed with the install.

Setup Screen	Steps
	<ol style="list-style-type: none">1. After any prerequisites are installed on the PC, you will see the following screen:2. Click on the "Next" button to proceed. The following screen shows:

Setup Screen	Steps
	<p>3. This is the End User License Agreement for the <i>ESI Click to Call</i> software. Please read through it carefully to ensure that you agree with the terms of your use of this software.</p> <p>4. Once completed, select the "I accept the terms in the License Agreement" selection then click the "Next" button to proceed with the installation. Next, you will be asked to specify where you would like <i>ESI Click to Call</i> to be installed:</p>
	<p>5. You may choose the default location and click the "Next" button. On the following screen, click "Next" again to begin the installation.</p>

Setup Screen	Steps
	<ol style="list-style-type: none">6. After a few moments, the installation will complete and you will see the following screen:7. Click "Finish". The installation is complete!

Configuration

Accessing Settings

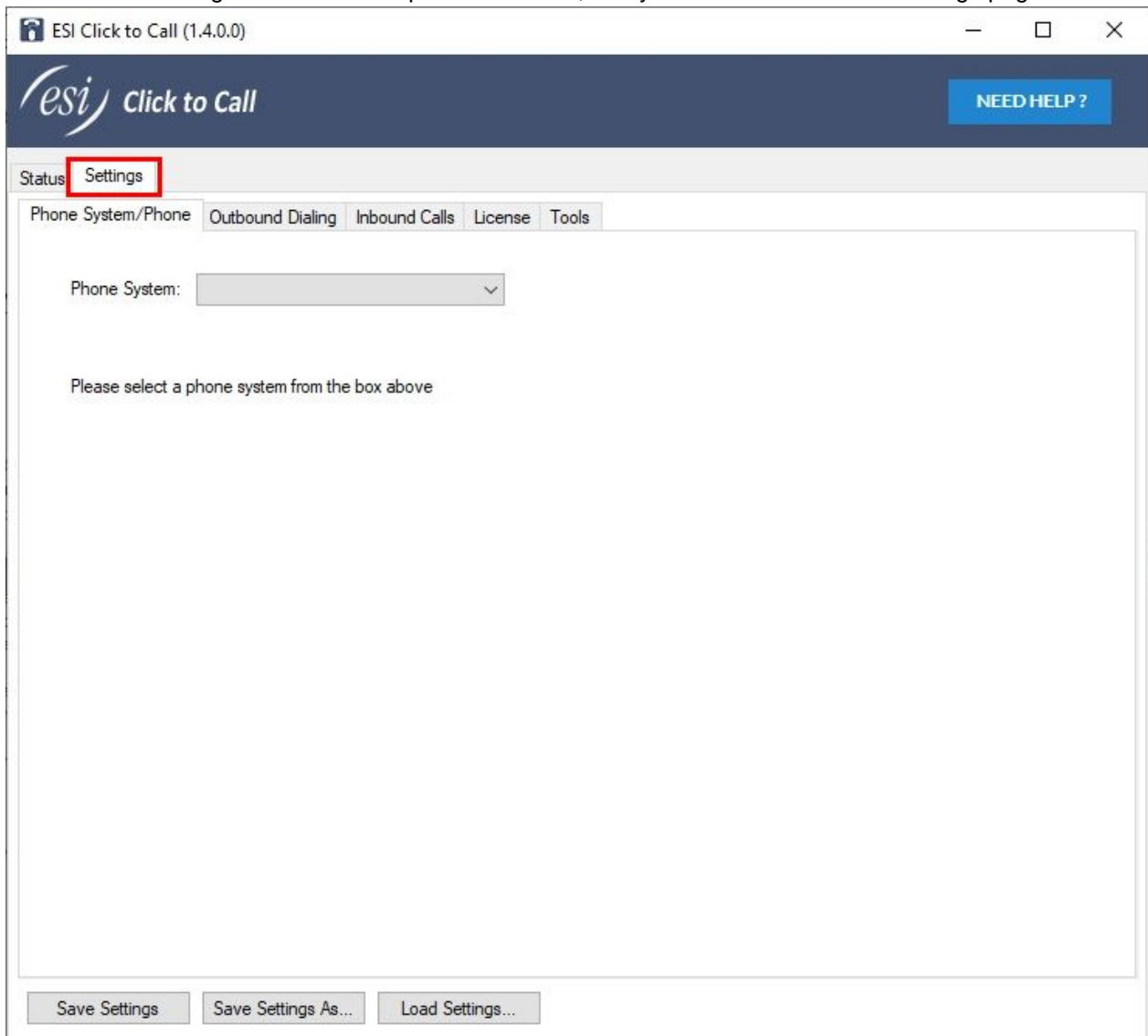
To access the Settings screen of *ESI Click to Call*, the program must first be running. *ESI Click to Call* is set to launch automatically with Windows®. You can verify it is running by locating the following icon in the Windows System Tray, near the clock:



Note: if you do not see this icon (white phone handset/mouse with dark blue background), you may click the white, upward-pointing arrow to the left in that area to see additional icons.

You may either double-click the *ESI Click to Call* icon in the System Tray, or right-click it and then left-click the "View Settings" option that appears. You will then see the following screen:

Click on the "Settings" tab near the top of the window, and you will be taken to the Settings page:



Phone System/Phone Settings

The Phone System/Phone settings tab initially appears as follows:

The screenshot shows the ESI Click to Call (1.4.0.0) application window. The title bar reads "ESI Click to Call (1.4.0.0)". The application has a dark blue header with the "esi Click to Call" logo on the left and a "NEED HELP ?" button on the right. Below the header is a tabbed interface. The "Settings" tab is selected and highlighted with a red rectangle. Other tabs include "Status", "Phone System/Phone", "Outbound Dialing", "Inbound Calls", "License", and "Tools". The "Phone System/Phone" sub-tab is also selected. The main content area contains a "Phone System:" label followed by a dropdown menu. Below the dropdown, a message reads: "Please select a phone system from the box above". At the bottom of the window, there are three buttons: "Save Settings", "Save Settings As...", and "Load Settings...".

Choose a phone system type from the "Phone System:" dropdown box:

Phone System:

The appearance of this screen will change depending upon which phone system selection you choose.

Connection Settings for ESI eSIP Evolution Series

Upon choosing the "ESI eSIP Evolution Series" phone system option, the screen will change as follows:

ESI Click to Call (1.4.0.0)

esi Click to Call NEED HELP ?

Status Settings

Phone System/Phone Outbound Dialing Inbound Calls License Tools

Phone System: ESI eSIP Evolution Series

App Server IP Address:

Port number: 47319

Extension number:

Password:

Test Connection

Connection Status: Not Connected
Not Logged In

Save Settings Save Settings As... Load Settings...

Here, you will enter the settings required to connect to ESI Application Server (licensed and installed separately on a single PC at the site).

Item	Description
App Server IP Address	The IP address of the PC upon which <i>ESI Application Server</i> is installed. Note that this is NOT the IP address of the phone system. If this installation of <i>ESI Click to Call</i> is on the same PC as <i>ESI Application Server</i> , you may enter 127.0.0.1 here.
Port Number	The port number to connect to on <i>ESI Application Server</i> . This is 47319 by default.
Extension Number	The user's phone extension number.
Password	The user's numeric voice mail password.

Item	Description
Test Connection	Allows you to test the connection to <i>ESI Application Server</i> .
Connection Status	Shows the current connection status to <i>ESI Application Server</i> , and whether you are successfully logged in. Note that the status will not update until after you have saved your settings.

Connection Settings for ESI CommServers and IP Server 900

Upon choosing the "ESI CS or IP Server 900" phone system option, the screen will change as follows:

ESI Click to Call (1.4.0.0)

esi Click to Call [NEED HELP ?](#)

Status Settings

Phone System/Phone Outbound Dialing Inbound Calls License Tools

Phone System: ESI CS or IP Server 900

(no further settings normally required)

Windows 8/10 TAPI Workaround

Activate this feature if inbound Caller ID information is not being received.

NOTE: In order for this workaround to succeed, you must first download and install WinPcap (you MUST tell it to launch automatically with Windows). You may also need to restart this software once as Administrator after the WinPcap installation).

[Download WinPcap \(http://www.winpcap.org/install/default.htm\)](http://www.winpcap.org/install/default.htm)

☐ Use workaround NSP IP Address: Extension number:

Save Settings Save Settings As... Load Settings...

No further settings are normally required on this screen. If your PC operating system is Windows® 8 or 10, and inbound Caller ID information is not being received, you may check the "Use workaround" box. Note that, in order for this workaround to succeed, you must first download and install the third-party application WinPcap (free of charge as of this writing). During installation, you must tell it to launch

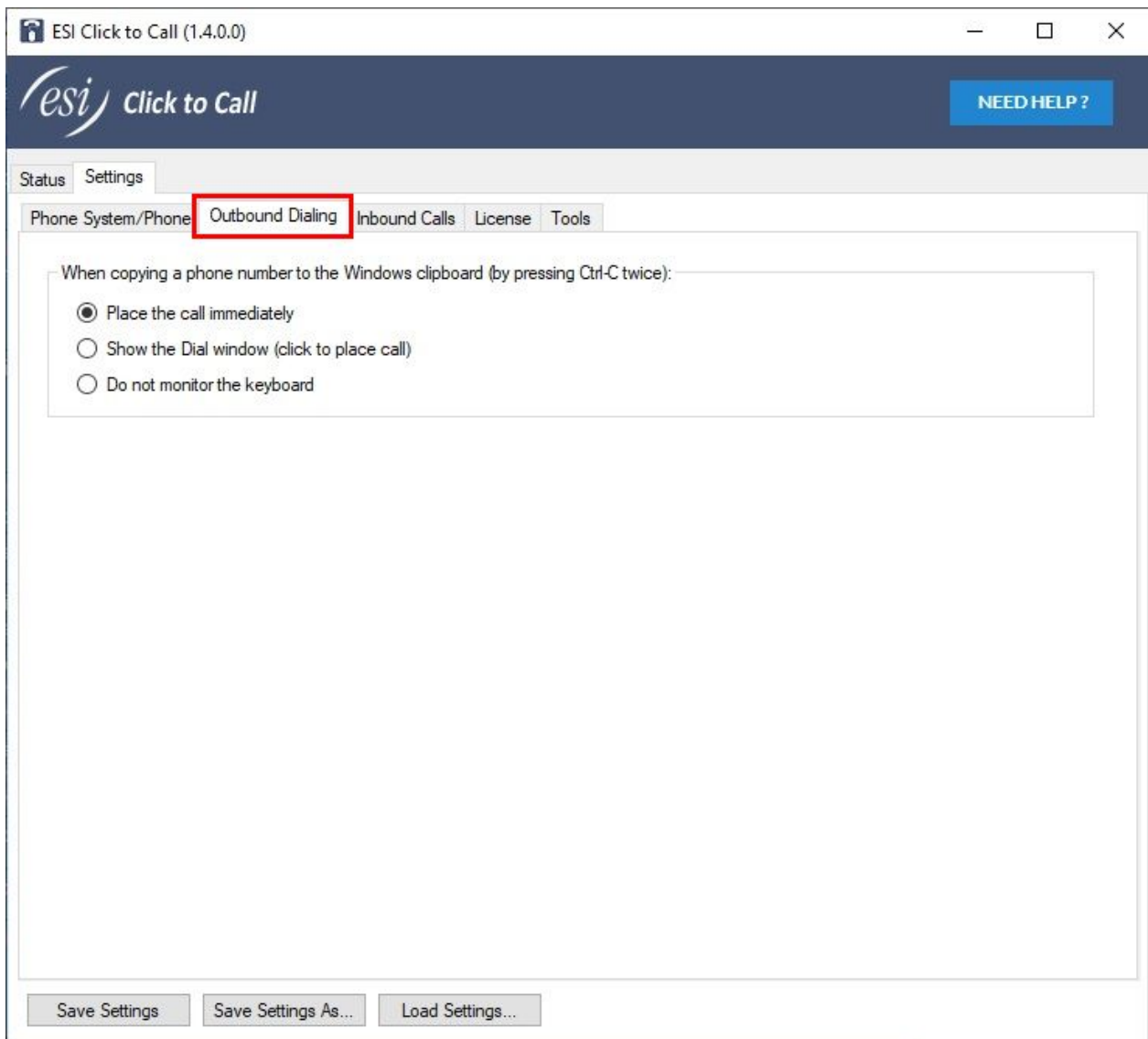
automatically with Windows®. When you have checked the "Use workaround" box, the NSP IP Address and Extension number should automatically populate, assuming you have already installed *VIP 7* or the IP Server 900 API on this PC.

Outbound Dialing Settings

The contents of the Outbound Dialing settings tab depends upon which phone system type you have chosen:

Outbound Dialing for ESI eSIP Evolution Series

If you have chosen the "ESI eSIP Evolution Series" phone system on the "Phone System/Phone" settings tab, the Outbound Dialing settings screen will appear as follows:



There is a single section on this tab:

When copying a phone number to the Windows clipboard (by pressing Ctrl-C twice):

- ☒ Place the call immediately
- ☐ Show the Dial window (click to place call)
- ☐ Do not monitor the keyboard

ESI Click to Call allows for the PC user to initiate dialing of any phone number that can be copied to the Windows® clipboard; this is initiated by highlighting the telephone number, and then holding down the Ctrl button and pressing C twice. The user has the option to:

Item	Description
Place the call immediately	This is the default option and will be suitable for most users.
Show the Dial window (click to place call)	If this option is chosen, when the PC user highlights a phone number and presses Ctrl-C twice, the number will not immediately dial, but instead a small window will show indicating that a phone number was detected; the user can then manually click a Dial button in this window in order for the call to be dialed.
Do not monitor the keyboard	This has the effect of disabling this dialing functionality.

Outbound Dialing for ESI CommServers and IP Server 900

If you have chosen the "ESI CS or IP Server 900" phone system on the "Phone System/Phone" settings tab, the Outbound Dialing settings screen will appear as follows:

ESI Click to Call (1.4.0.0)

esi Click to Call NEED HELP ?

Status Settings

Phone System/Phone **Outbound Dialing** Inbound Calls License Tools

When copying a phone number to the Windows clipboard (by pressing Ctrl-C twice):

- ☒ Place the call immediately
- ☐ Show the Dial window (click to place call)
- ☐ Do not monitor the keyboard

Dialing Rules

- ☒ Follow the Windows dialing rules [Dialing Rules...](#)
- ☐ Use the following dialing rules:

7 Digit Dialing Area Codes: 10 Digit Dialing Area Codes:

[Remove](#) [Remove](#)

[Add](#) [Add](#)

☐ On unmatched area codes, dial as 10-digit (if unchecked, will dial as long distance with a 1 in front of number)

Before local calls, dial and before long distance calls, dial International Prefix:

[Save Settings](#) [Save Settings As...](#) [Load Settings...](#)

There are two sections to this tab:

When copying a phone number to the Windows clipboard (by pressing Ctrl-C twice):

- ☒ Place the call immediately
- ☐ Show the Dial window (click to place call)
- ☐ Do not monitor the keyboard

ESI Click to Call allows for the PC user to initiate dialing of any phone number that can be copied to the Windows® clipboard; this is initiated by highlighting the telephone number, and then holding down the Ctrl button and pressing C twice. The user has the option to:

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Dialing Rules

☒ Follow the Windows dialing rules [Dialing Rules...](#)

☐ Use the following dialing rules:

7 Digit Dialing Area Codes:

Add

Remove

10 Digit Dialing Area Codes:

Add

Remove

☐ On unmatched area codes, dial as 10-digit (if unchecked, will dial as long distance with a 1 in front of number)

Before local calls, dial and before long distance calls, dial International Prefix:

The rules that must be followed at each customer site in order to properly call various number types (for example, local and long distance) will vary. In this section, these dialing rules must be specified. There are two methods in which these rules can be specified:

Item	Description
Follow the Windows® dialing rules	Windows® has a set of built-in dialing rules that can be accessed and followed. If this PC has any other programs that may require the Windows® dialing rules to be specified, you can indicate in ESI <i>Click to Call</i> that these rules should be followed. For convenience, a "Dialing Rules..." button is provided to navigate directly to the Windows® dialing rules setup.
Use the following dialing rules	If you do not wish to use the Windows® dialing rules, or if they do not allow for enough specificity (for example, you are at a site where all local and long distance numbers should be dialed as ten digits), you may specify dialing rules directly within ESI <i>Click to Call</i> . This has the added advantage of being able to save the configuration file and copy it to other PCs, which would be especially helpful at site installations where many seats must be configured.

Note: One-click dialing is possible with *ESI Click to Call*, for phone numbers on web pages in either the Google Chrome™ or Mozilla Firefox® browser. In order to install the necessary browser plugins, refer to the separate topic, , [Tools Settings](#).

Understanding CRM

Customer Relationship Management (CRM) is an approach to managing a company's interaction with current and future customers. The CRM approach analyzes data about customers' history to improve business relationships with customers, specifically focusing on customer retention, and ultimately to drive sales growth.

The primary goal of customer relationship management systems is to integrate and automate sales, marketing, and customer support. Therefore, these systems typically have a dashboard that gives an overall view of the three functions on a single page for each customer that a company may have. The dashboard may provide client information, past sales, previous marketing efforts, and more, summarizing all of the relationships between the customer and the firm.

With *ESI Click to Call*, incoming calls will initiate a screen pop of the information currently available in your existing CRM system by using the Caller ID information of the incoming call to simultaneously launch a search for that customer record from your integrated CRM. Conversely, outgoing calls are expedited with *Click to Call* by facilitating one-click dialing from your databases and web browsers.

While it is impossible to integrate with or even to list every CRM imaginable, ESI has attempted to provide integration with the most prominent third-party CRM software applications in existence today.

The intelligent integration of CRM data, driven by incoming Caller ID technology, is the most exciting development since the advent of Caller ID. Gone are the days when a customer first provides personal information then waits while his account is located. Callers can now be greeted personally by an agent who is already viewing that customer's CRM history - customer service has never been simpler.

Inbound Calls Settings

All third-party CRM software is different, and the steps required to search for a customer or prospect record vary for each. *ESI Click to Call* has a very flexible means of specifying these steps, so that even previously unknown CRM software can likely be integrated. However, with great power comes great responsibility:

Disclaimer: the functions used in this software in order to screen "pop" (search for a customer or prospect record based on Caller ID Number of an inbound call) are quite powerful. Furthermore, the Windows operating system is dynamic, and neither the state of the Windows operating system, nor the applications running on it, at a given time can be accurately predicted or accounted for with certainty. Finally, the requirements of each CRM to search based on phone number differ based upon the particular CRM and software revision, and the steps may even vary from PC to PC within a site installation. While *ESI Click to Call* is designed for flexibility, there can be no guarantee of compatibility with any particular CRM, or that compatibility can be preserved with a new revision of the CRM application software. Therefore, the authors of this software make NO WARRANTIES OF ANY KIND except that they will use reasonable efforts to keep the software error-free. No other warranties, express or implied, are given, including but not limited to the software's fitness for a particular purpose, or that there will be no malfunction or data loss.

The Inbound Calls settings tab appears as follows:

The top section of this tab details the steps that *ESI Click to Call* should follow in order to screen "pop" to the customer's CRM of choice. These steps may be added, removed, and edited as needed (and even the order of the steps may be changed) in order to produce the desired effect. The steps that can be added, and their configuration, are covered in detail in the topic, [Inbound Calls - Adding a Step](#).

The lower section of this tab includes these general parameters:

Phone Number Format for {PHONE} tag: In order to screen "pop" with a given CRM, the format of the phone number expected by that CRM may vary. This box allows you to specify how the number will be formatted in order to match the format expected by the CRM application.

You also have flexibility with respect to the timing of the screen "pop". You may choose to have the screen "pop" when your ESI phone first rings, when you answer the phone, or only when a small window of the phone number appears on-screen and you click on the "View Contact" button.

Do not show incoming call window: suppress the window that normally appears on an incoming call.

After screen pop, close incoming call window: This is normally checked. If you uncheck it, then you will need to dismiss the incoming call window manually each time it appears.

Inbound Calls - Adding a Step

When you add a step to the list of steps required in order to screen "pop" (by clicking the "**Add Step**" button on the Inbound Calls tab in Settings), you will be presented with the following screen:

The screenshot shows a 'Step Configuration' dialog box. On the left, under 'Step Type:', there is a list of radio buttons: 'Find A Window or Control' (selected), 'Activate Window', 'Send Keystrokes', 'Send Mouse Click', 'Execute DDE Command', 'Pause', 'Close Window', 'Run A Program', 'Find Outlook Contact', and 'Web-Based CRM'. Below this list is a link: 'Disclaimer - please read'. The main area is titled 'Details:'. It contains a text input field for 'Program's main window title bar or process name contains the text:' with a 'Test' button. Below this are two radio buttons: 'Basic Find: the main program window is what I am looking for' (selected) and 'Advanced Find: I am looking for a sub-window (child window) or a control in the program'. A descriptive text follows: 'Describe a path to the child window or control. For each level, you can use either the full Text or full Class Name of the window or control. Set Index to 1, unless there are multiple windows/controls with that same name.' Below this is a 'Name:' input field, an 'Index:' input field with the value '1', and an 'Add' button. At the bottom of the 'Details' section is a table with two columns: 'Name' and 'Index'. To the right of the table is a 'Remove Selected' button. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

There are a number of step types available for selection. When combined in the correct order and with the correct parameters these steps will allow for contact or prospect searching by Caller ID Number (screen "pops"). The step types available are:

Each of these step types will be covered in more detail in the following topics.

Step Type:

- ☒ Find A Window or Control
- ☐ Activate Window
- ☐ Send Keystrokes
- ☐ Send Mouse Click
- ☐ Execute DDE Command
- ☐ Pause
- ☐ Close Window
- ☐ Run A Program
- ☐ Find Outlook Contact
- ☐ Web-Based CRM

Find a Window or Control

When you choose the "Find a Window or Control" step type, the screen will change as follows:

The screenshot shows the 'Step Configuration' dialog box. On the left, under 'Step Type:', the 'Find A Window or Control' option is selected. Below it is a list of other step types: Activate Window, Send Keystrokes, Send Mouse Click, Execute DDE Command, Pause, Close Window, Run A Program, Find Outlook Contact, and Web-Based CRM. A link 'Disclaimer - please read' is at the bottom of this list. The main area is titled 'Details:'. It contains a text input field for 'Program's main window title bar or process name contains the text:' with a 'Test' button. Below this are two radio buttons: 'Basic Find: the main program window is what I am looking for' (selected) and 'Advanced Find: I am looking for a sub-window (child window) or a control in the program'. Under 'Advanced Find', there is a description: 'Describe a path to the child window or control. For each level, you can use either the full Text or full Class Name of the window or control. Set Index to 1, unless there are multiple windows/controls with that same name.' Below this is a 'Name:' input field, an 'Index:' input field with the value '1', and an 'Add' button. At the bottom is a table with two columns: 'Name' and 'Index'. To the right of the table is a 'Remove Selected' button. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

Name	Index
------	-------

In this step, you should type some text that will always be found in the title bar of the main window of the program you're trying to locate. This does not need to be the entire text located in the title bar (and in fact, many programs change the text in their title bar), but there should be some text that does not change, and will not be found in the title bar of any other program. This is usually not hard to do. If, for your particular CRM this is not possible, you can also specify the Windows® process name; this can be found via the Windows Task Manager, on the Processes tab. You can launch the Task Manager by pressing Ctrl-Shift-Esc on your keyboard.

In most cases, the main program window is what we're seeking, so you can leave the "Basic Find" radio button selected. If, on the other hand, you're trying to locate a sub-window (child window) or an individual control in the program, you may select the "Advanced Find" radio button, and describe the hierarchical path to the sub-window or control. This is considered an advanced procedure, and a full explanation lies beyond the scope of this user guide.

Activate Window

When you choose the "Activate Window" step type, the screen will change as follows:

Step Configuration

Step Type:

- ☐ Find A Window or Control
- ☒ Activate Window
- ☐ Send Keystrokes
- ☐ Send Mouse Click
- ☐ Execute DDE Command
- ☐ Pause
- ☐ Close Window
- ☐ Run A Program
- ☐ Find Outlook Contact
- ☐ Web-Based CRM

[Disclaimer - please read](#)

Details:

Note: you must "Find A Window" before you can activate it. This step will bring the "found" window to the foreground and give it focus.

- ☒ Show window maximized
- ☐ Show window restored

Save Cancel

As explained on this screen, in order to activate a window, you must first have "found" the window via a prior step (see "[Find a Window or Control](#)"). This step actually brings the "found" window to the foreground and gives it focus. You may choose to "Show window maximized", in which case it will take up the entire screen, or "Show window restored", in which case it will normally take up a portion of the screen.

Send Keystrokes

When you choose the "Send Keystrokes" step type, the screen will change as follows:

Step Configuration

Step Type:

- ☐ Find A Window or Control
- ☐ Activate Window
- ☒ Send Keystrokes
- ☐ Send Mouse Click
- ☐ Execute DDE Command
- ☐ Pause
- ☐ Close Window
- ☐ Run A Program
- ☐ Find Outlook Contact
- ☐ Web-Based CRM

[Disclaimer - please read](#)

Details:

Keystrokes to send:

Test phone number:

Note: you must "Find A Window or Control" and "Activate Window" before sending keystrokes, because the keystrokes will be sent to whatever window is active on the system.

Enter the characters you want to send into the box above (scroll to the bottom of these instructions for examples).

% = Alt + = Shift ^ = Ctrl
{NPA} = Area Code of incoming phone number
{NXX} = Prefix (next 3 digits of the phone number)
{SLID} = Last 4 digits of the phone number
{PHONE} = Complete phone number, 10 digits, digits only (UNLESS YOU HAVE SPECIFIED A PHONE NUMBER FORMAT in the main settings, in which case it will take on the format you specify)
{PAUSE} = will pause for 1/4 second before continuing

The following characters MUST be entered in brackets: % + ^ ~ () { } []
For example, to send a percent sign, you would enter { % } or to send an open bracket, you would enter { { }

The following are codes for special keys:

Key	Code
-----	-----

As noted in this screen, in order to send keystrokes to a program, you must "Find a Window or Control" and "Activate Window", because the keystrokes you specify will be sent to whatever screen is active on the system.

In the "Keystrokes to send" box, you will enter the characters you want to send to the active window (refer to the end of this help topic for examples):

Keystroke	Actions
%	Alt
+	Shift
^	Ctrl
{NPA}	Area code of incoming phone number
{NXX}	Prefix (next 3 digits of phone number)
{SLID}	Last 4 digits of phone number
{PHONE}	Complete phone number, 10 digits, digits only (UNLESS YOU HAVE SPECIFIED A PHONE NUMBER FORMAT in the main settings, in which case it will take on the format you specify)
{PAUSE}	Pause for 1/4 second before continuing

The following characters MUST be entered in brackets: % + ^ ~ () { } []

For example, to send a percent sign, you would enter { % } or to send an open bracket, you would enter { { }

The following are codes for special keys:

Key	Code	Key	Code
BACKSPACE	{BACKSPACE}, {BS}, or {BKSP}	F1	{F1}
BREAK	{BREAK}	F2	{F2}
CAPS LOCK	{CAPSLOCK}	F3	{F3}
DEL OR DELETE	{DELETE} or {DEL}	F4	{F4}
DOWN ARROW	{DOWN}	F5	{F5}
END	{END}	F6	{F6}
ENTER	{ENTER} or ~	F7	{F7}
ESC	{ESC}	F8	{F8}
HELP	{HELP}	F9	{F9}
HOME	{HOME}	F10	{F10}
INS OR INSERT	{INSERT} or {INS}	F11	{F11}
LEFT ARROW	{LEFT}	F12	{F12}
NUM LOCK	{NUMLOCK}	F13	{F13}
PAGE DOWN	{PGDN}	F14	{F14}
PAGE UP	{PGUP}	F15	{F15}
RIGHT ARROW	{RIGHT}	F16	{F16}
SCROLL LOCK	{SCROLLLOCK}	Keypad add	{ADD}
TAB	{TAB}	Keypad subtract	{SUBTRACT}
UP ARROW	{UP}	Keypad multiply	{MULTIPLY}
		Keypad divide	{DIVIDE}

EXAMPLES:

To Send:	Enter:
Hello	Hello
Alt + f	%(f)
Ctrl + Shift + P	^(+(P))
Send the incoming phone number in the format 7775551212	{PHONE}
Send the incoming phone number in the format (777) 555-1212 (when you have specified a number format of (###) ###-#### in the main settings)	{PHONE}
Send Ctrl + S, then phone number in the format 555-1212	^(S){NXX}-{SLID}

Send Mouse Click

When you choose the "Send Mouse Click" step type, the screen will change as follows:

The screenshot shows a 'Step Configuration' dialog box with a title bar containing a minus, maximize, and close button. On the left is a 'Step Type:' list with radio buttons for: Find A Window or Control, Activate Window, Send Keystrokes, Send Mouse Click (selected), Execute DDE Command, Pause, Close Window, Run A Program, Find Outlook Contact, and Web-Based CRM. Below this list is a blue hyperlink 'Disclaimer - please read'. The main area is titled 'Details:' and contains a note: 'Note: you must first "Find A Window" and "Activate Window" before sending a mouse click, because whatever you are clicking on must be visible first!'. Below the note are two radio buttons: 'This "window" is a control like a button; just click it anywhere' (selected) and 'I need to click this window in a specific spot:'. The second option has two input boxes for 'Click' followed by 'pixels to the right and' and 'pixels below the upper-left of the selected window'. A 'Help Me Measure...' button is to the right. At the bottom of the details area is a warning: 'Warning: this option should be used as infrequently as possible, because if the size or position of windows or controls on the screen changes, you will be clicking in the wrong spot! If you can find a way to "Send Keystrokes" instead of a mouse click to accomplish what you want, this will be much better.' At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

Note: in order to send a mouse click to a window, you must first "Find A Window or Control" and "Activate Window", because whatever you are clicking must be visible first!

If you need to click the window in a specific spot (as is usually the case), select the "I need to click this window in a specific spot" radio button. When you do so, two boxes will become active, allowing you to specify the X and Y coordinates (in pixels) in relation to the upper-left of the active window. For your convenience, you can click the "Help Me Measure..." button, and a new window that is partially transparent will appear that you can position over the window you'd like to click; clicking on the semi-transparent window will obtain the X and Y coordinates for you.

Warning: the "Send Mouse Click" step should be used as infrequently as possible, because if the size or position of windows or controls on the screen changes, the wrong location will be clicked! If you are able to "Send Keystrokes" instead of using a mouse click to accomplish what is needed, this will be better and more reliable.

Execute DDE Command

When you choose the "Execute DDE Command" step type, the screen will change as follows:

Step Configuration

Step Type:

- ☐ Find A Window or Control
- ☐ Activate Window
- ☐ Send Keystrokes
- ☐ Send Mouse Click
- ☒ Execute DDE Command
- ☐ Pause
- ☐ Close Window
- ☐ Run A Program
- ☐ Find Outlook Contact
- ☐ Web-Based CRM

[Disclaimer - please read](#)

Details:

DDE stands for Dynamic Data Exchange. Many programs do not support this feature. If you are dealing with a program that does accept DDE commands, you can enter the information here.

DDE Program:

Link Topic:

Command:

Timeout (secs.):

Test phone number:

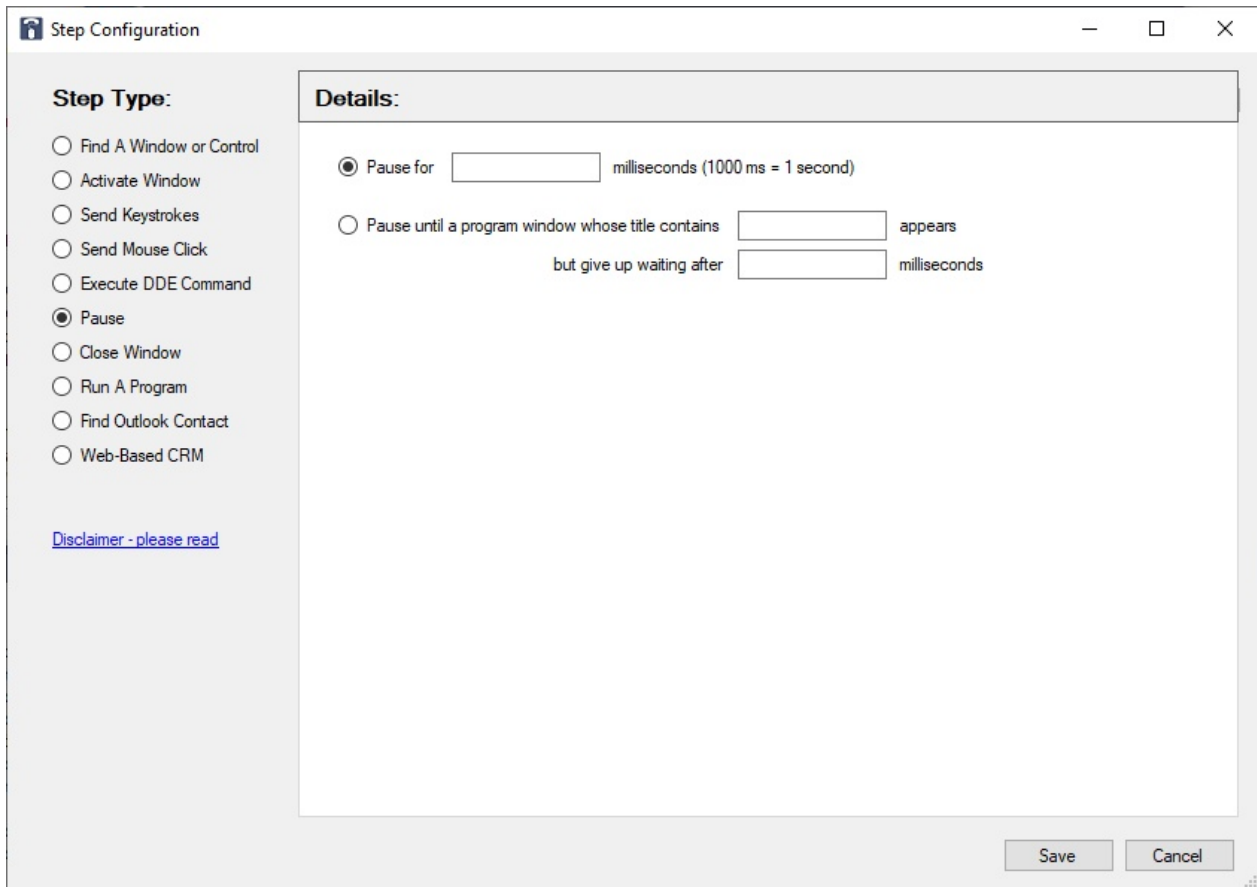
The Command box above can contain the following codes:

- {NPA} = Area Code of incoming phone number
- {NXX} = Prefix (next 3 digits of the phone number)
- {SLID} = Last 4 digits of the phone number
- {PHONE} = Complete phone number, 10 digits, digits only (UNLESS YOU HAVE SPECIFIED A PHONE NUMBER FORMAT in the main settings, in which case it will take on the format you specify)

DDE stands for Dynamic Data Exchange. If your CRM supports DDE commands (most do not), you may enter the appropriate information in these boxes. Typically, the information to enter would be provided by the CRM vendor in a user guide or technical manual.

Pause

When you choose the "Pause" step type, the screen will change as follows:



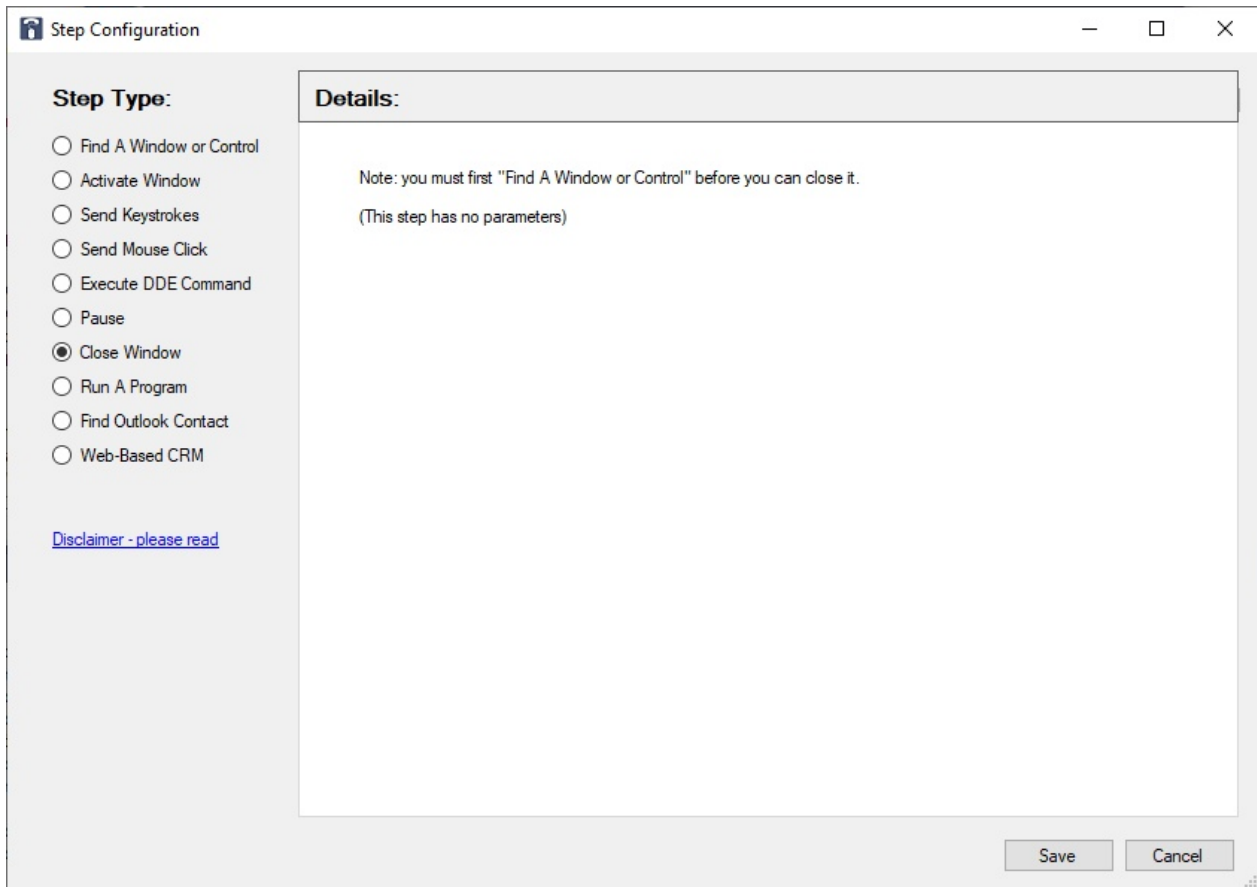
The screenshot shows a 'Step Configuration' dialog box. On the left, under 'Step Type:', there is a list of options: Find A Window or Control, Activate Window, Send Keystrokes, Send Mouse Click, Execute DDE Command, Pause (selected with a radio button), Close Window, Run A Program, Find Outlook Contact, and Web-Based CRM. Below this list is a link that says 'Disclaimer - please read'. On the right, under 'Details:', there are two options. The first option, 'Pause for [] milliseconds (1000 ms = 1 second)', is selected with a radio button. The second option, 'Pause until a program window whose title contains [] appears but give up waiting after [] milliseconds', is not selected. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

When *ESI Click to Call* initiates the search of a contact or prospect in your CRM software, it executes a series of steps in rapid succession. Sometimes, it may be necessary to introduce a slight pause in the process to allow your CRM to "catch up". The need for a pause is not a given, but if required, it generally becomes apparent during testing.

When you pause, your options are to: (a) pause for a specific amount of time (specified in milliseconds); or (b) pause while you're waiting for a program window to become available.

Close Window

When you choose the "Close Window" step type, the screen will change as follows:



The screenshot shows a 'Step Configuration' dialog box. On the left, under 'Step Type:', there is a list of step types with radio buttons. 'Close Window' is selected. Below this list is a link that says 'Disclaimer - please read'. On the right, under 'Details:', there is a text area containing the note: 'Note: you must first "Find A Window or Control" before you can close it. (This step has no parameters)'. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

Step Type:	Details:
<input type="radio"/> Find A Window or Control <input type="radio"/> Activate Window <input type="radio"/> Send Keystrokes <input type="radio"/> Send Mouse Click <input type="radio"/> Execute DDE Command <input type="radio"/> Pause <input checked="" type="radio"/> Close Window <input type="radio"/> Run A Program <input type="radio"/> Find Outlook Contact <input type="radio"/> Web-Based CRM	Note: you must first "Find A Window or Control" before you can close it. (This step has no parameters)

[Disclaimer - please read](#)

Save Cancel

With some CRM software, it may be necessary to close a sub-window (child window) in the program before we can properly perform a search based on Caller ID Number. This may be the case, for example, if a previous search has opened a search window that must subsequently close before successfully performing a new search.

Note that you must first "Find a Window or Control" before you can close it.

Run A Program

When you choose the "Run A Program" step type, the screen will change as follows:

The screenshot shows a 'Step Configuration' dialog box with the 'Run A Program' step type selected. The 'Details' section contains a text input field for the full path to the program, a 'Test phone number' field with the value '7775551212', and a 'Test' button. A disclaimer link is also present.

Step Configuration

Step Type:

- ☐ Find A Window or Control
- ☐ Activate Window
- ☐ Send Keystrokes
- ☐ Send Mouse Click
- ☐ Execute DDE Command
- ☐ Pause
- ☐ Close Window
- ☒ Run A Program
- ☐ Find Outlook Contact
- ☐ Web-Based CRM

[Disclaimer - please read](#)

Details:

Enter the full path to the program you wish to run or the file you wish to launch:

...

Note: if the selected file is not an executable file, we will still try to launch it in the default program.

Arguments (optional):

Note that you can insert the following into your arguments and it will be translated real-time into the phone number. You must include the brackets.

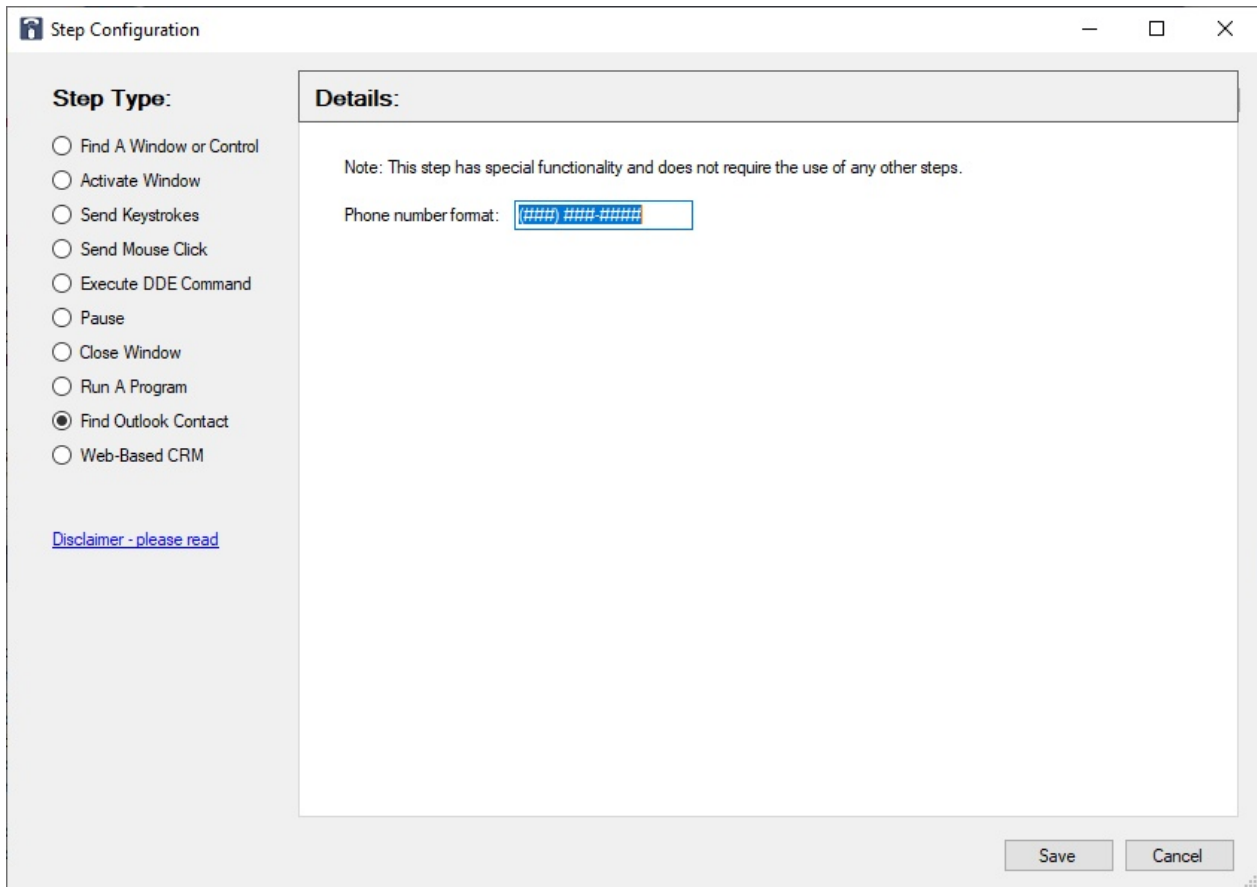
{NPA} = Area Code of incoming phone number
{NXX} = Prefix (next 3 digits of the phone number)
{SLID} = Last 4 digits of the phone number
{PHONE} = Complete phone number, 10 digits, digits only (UNLESS YOU HAVE SPECIFIED A PHONE NUMBER FORMAT in the main settings, in which case it will take on the format you specify)

Test phone number:

If it is required as part of searching for a record in your CRM, *ESI Click to Call* does have the ability to Run A Program. Normally, this is not needed, because it is assumed that your CRM is already running. You can either launch an actual executable program (having a .EXE extension), or if you choose another file type, an attempt will be made to launch it in the default program registered with Windows® for that file type. If the program you launch requires that you specify the phone number as part of the starting arguments, you can specify such in the "Arguments (optional)" box, for example, with the special {PHONE} designation, which will be replaced with the actual phone number of the inbound call.

Find Outlook Contact

When you choose the "Find Outlook Contact" step type, the screen will change as follows:



The screenshot shows a 'Step Configuration' dialog box. On the left, under 'Step Type:', there is a list of options with radio buttons. 'Find Outlook Contact' is selected. Below this list is a link that says 'Disclaimer - please read'. On the right, under 'Details:', there is a note: 'Note: This step has special functionality and does not require the use of any other steps.' Below the note is a label 'Phone number format:' followed by a text input field containing a sample phone number format: '(###) ###-####'. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

Step Configuration

Step Type:

- ☐ Find A Window or Control
- ☐ Activate Window
- ☐ Send Keystrokes
- ☐ Send Mouse Click
- ☐ Execute DDE Command
- ☐ Pause
- ☐ Close Window
- ☐ Run A Program
- ☒ Find Outlook Contact
- ☐ Web-Based CRM

[Disclaimer - please read](#)

Details:

Note: This step has special functionality and does not require the use of any other steps.

Phone number format: (###) ###-####

Save Cancel

Note that this step has special functionality and does not require the use of any other steps. You do, however, need to specify a phone number format. This must match the format in which you have originally entered contact phone numbers into Outlook®.

Web-Based CRM

A growing number of CRM applications are delivered via the cloud, as opposed to the traditional, PC-based application. *ESI Click to Call* is able to interact with many of these CRMs via a process called Web Automation. When you choose the "Web-Based CRM" step type, the screen will change as follows:

The screenshot shows a 'Step Configuration' window with a 'Step Type' list on the left and a 'Details' section on the right. The 'Web-Based CRM' option is selected. The 'Details' section includes fields for browser type (Chrome is selected), base URL, and a contact search URL. It also contains a 'Testing' section with a 'Launch Browser' button and a 'Test' button. A disclaimer link is present at the bottom left of the details section.

Step Type:

- ☐ Find A Window or Control
- ☐ Activate Window
- ☐ Send Keystrokes
- ☐ Send Mouse Click
- ☐ Execute DDE Command
- ☐ Pause
- ☐ Close Window
- ☐ Run A Program
- ☐ Find Outlook Contact
- ☒ Web-Based CRM

[Disclaimer - please read](#)

Details:

Browser type (you must have this browser installed on your PC):

- ☒ Chrome
- ☐ Firefox
- ☐ Internet Explorer (not recommended or supported) [Why?](#)

Base URL (example: <http://mycompany.example.com>):

When searching for a contact, use the following URL:

Note that you can insert the following into the URL above and it will be translated real-time into the phone number. You must include the brackets.

{NPA} = Area Code of incoming phone number
{XXX} = Prefix (next 3 digits of the phone number)
{SLID} = Last 4 digits of the phone number
{PHONE} = Complete phone number, 10 digits, digits only (UNLESS YOU HAVE SPECIFIED A PHONE NUMBER FORMAT in the main settings, in which case it will take on the format you specify)

Note that, in order for this software to be able to control the web browser in the manner needed, this software needs to be the one to launch the browser. It will do this when first launched, and in most cases, you will need to initially log into your CRM manually.

When this software is run, the web browser will be opened and will navigate to this URL

-OR- run commands for the following CRM:

Testing:

Launch Browser

Please log into your CRM if needed after launching browser, before testing the following phone number.

7775551212

Test

Save Cancel

An explanation of the various sections on this screen is as follows:

Browser type (you must have this browser installed on your PC):

- ☒ Chrome
- ☐ Firefox
- ☐ Internet Explorer (not recommended or supported) [Why?](#)

Here, you must specify which web browser will be used to access the web-based CRM (it must already have been installed on this PC). Note that the Internet Explorer® browser, while there is an option for it, is not recommended or supported due to its specific implementation of some things, which may make automating it in some cases difficult or unpredictable. Firefox® is the browser which is believed to have the greatest overall compatibility with *ESI Click to Call*. Chrome™ is another good option--and is in fact the default option, as it is measurably faster versus Firefox® during automation, and compatibility thus far has proven to be high.

Base URL (example: http://mycompany.example.com):

As indicated, this is the web link (URL) that will be launched initially when *ESI Click to Call* is run.

When searching for a contact, use the following URL:

Note that you can insert the following into the URL above and it will be translated real-time into the phone number. You must include the brackets.

{NPA} = Area Code of incoming phone number
{NXX} = Prefix (next 3 digits of the phone number)
{SLID} = Last 4 digits of the phone number
{PHONE} = Complete phone number, 10 digits, digits only
(UNLESS YOU HAVE SPECIFIED A PHONE NUMBER
FORMAT in the main settings, in which case it will take on
the format you specify)

-OR- run commands for the following CRM:

Testing:

Launch
Browser

Please log into your CRM
if needed after launching
browser, before testing the
following phone number.

7775551212

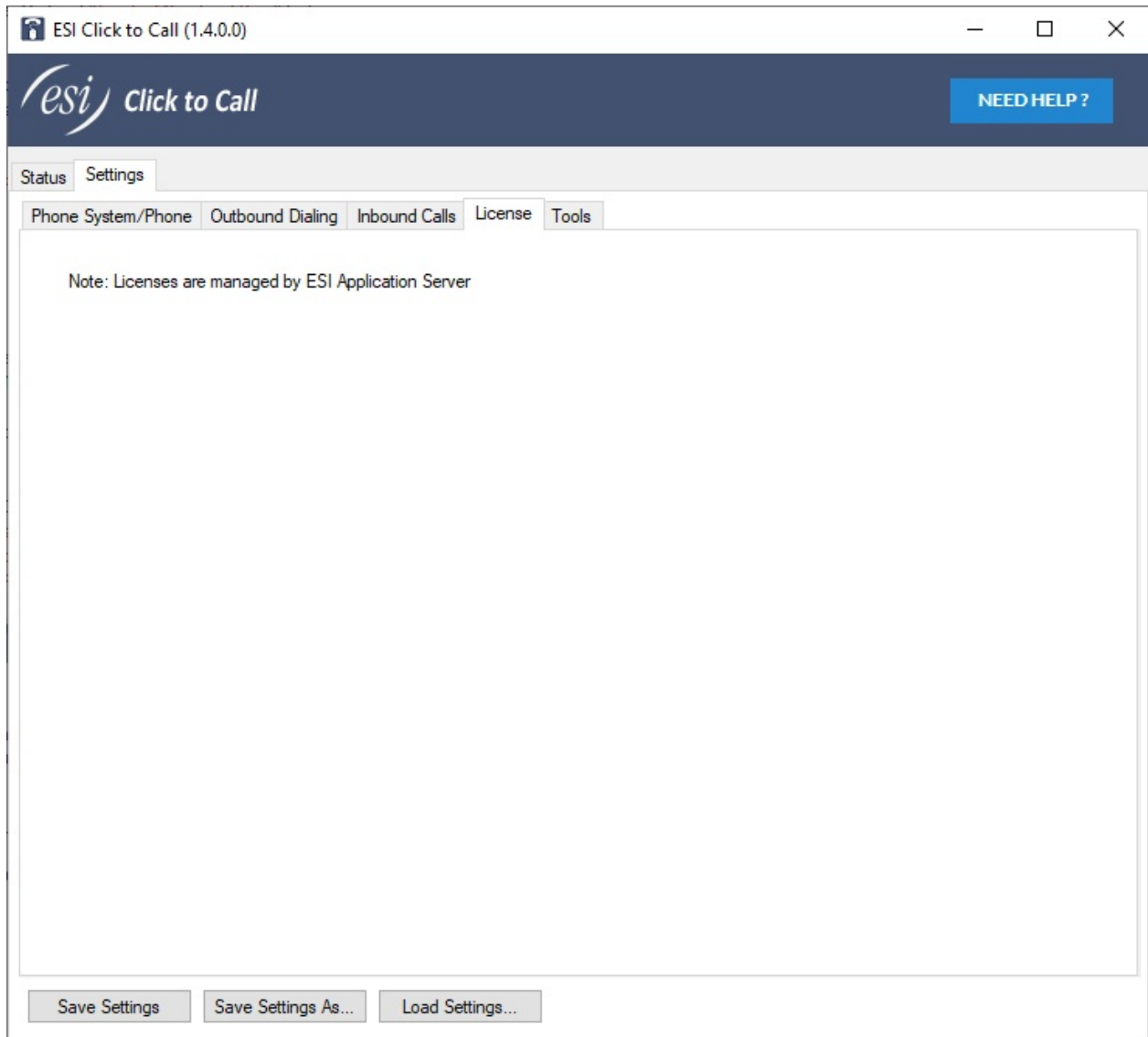
Test

Many web-based CRM sites will allow for a number search to be performed simply by specifying the phone number in a special link. *ESI Click to Call* allows you to specify this link (URL) to use when searching. Note that you can specify a variable called {PHONE} to represent the actual phone number of the inbound call when a search is performed.

For convenience, you may click on the drop-down box labeled "-OR- run commands for the following CRM:", and if your CRM is listed, you may select it. When you do so, one or both of the URL boxes to the left will automatically populate. In some cases, depending upon the particular CRM, there may be additional special steps that need to be performed, and choosing the CRM from the list has the effect of *ESI Click to Call* performing these steps as needed.

License Settings

In order to gain unlimited use of the *ESI Click to Call* software, it must be properly licensed. If your phone system type is "ESI eSIP Evolution Series", then licensing is handled by the separate application *ESI Application Server*, in which case this screen will appear as follows:



If your phone system type is "ESI CS or IP Server 900", the screen will appear as follows:

ESI Click to Call (1.4.0.0)

esi Click to Call

NEED HELP?

Status Settings

Phone System/Phone Outbound Dialing Inbound Calls License Tools

License

Serial Number:

License Code:

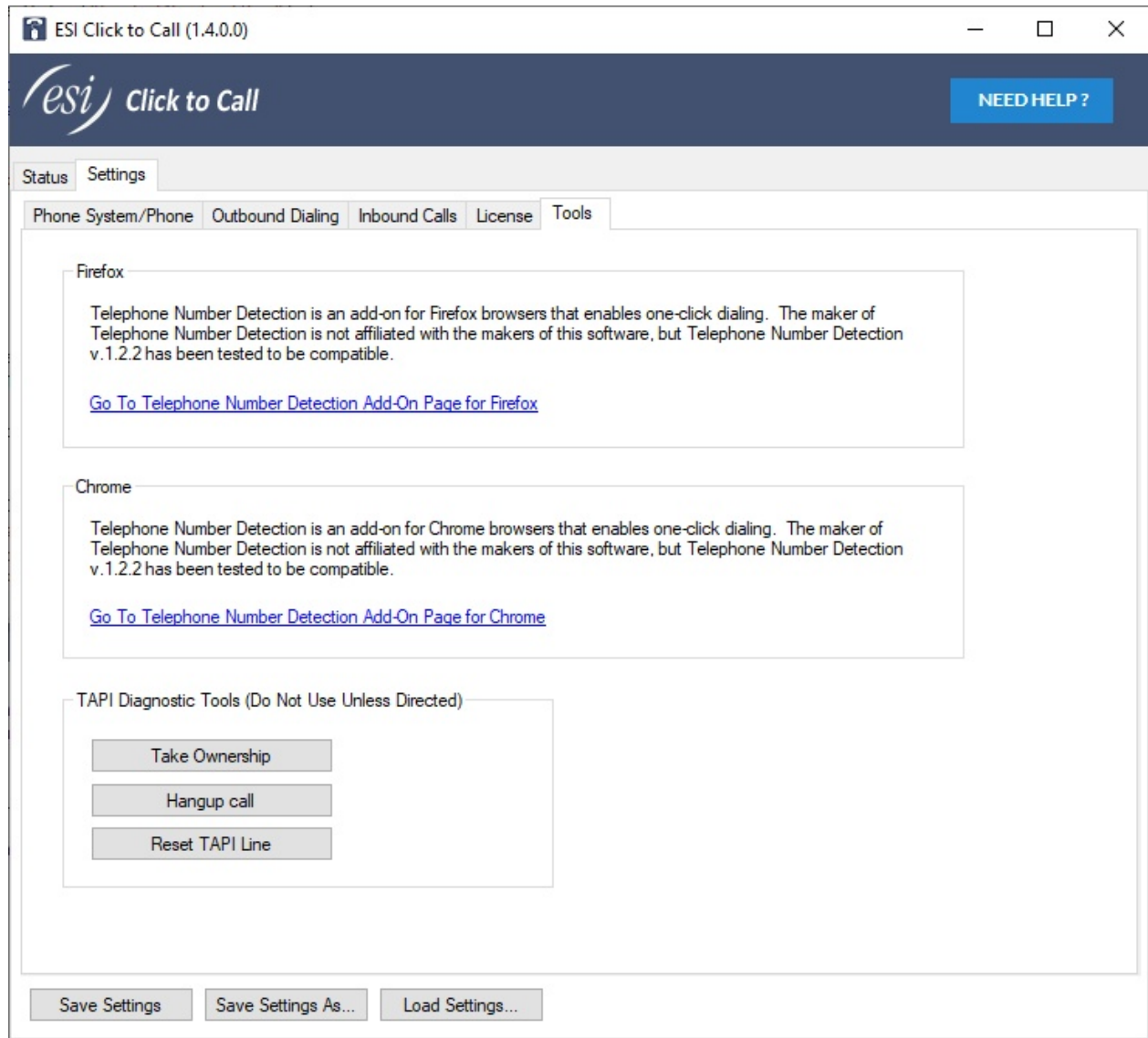
Save Settings Save Settings As... Load Settings...

When your phone system type is "ESI CS or IP Server 900", you must enter a License Code in the License settings screen.

The **Serial Number** varies by computer, and so will the **License Code** required to unlock *ESI Click to Call*. Please contact your ESI reseller in order to obtain the correct License Code, and then enter it into the License Code box in this screen. Once you have entered the correct License Code, the words "TRIAL MODE" will change to "Unlocked", and you will have full, unrestricted use of the software's features. While *ESI Click to Call* is in Trial mode, all features will be available for 30 days from the date of software installation.

Tools Settings

The Tools settings tab appears like so:



Primarily, this tab is used in order to access the web browser plugins needed for one-click dialing support in Google Chrome™ and Mozilla Firefox® browsers. Please follow the link and instructions provided for each if you desire this one-click functionality. Other web browsers, including Microsoft Internet Explorer®, are not supported at this time. Remember that even if a particular browser is not supported for one-click dialing, telephone numbers on web pages can still be highlighted and dialed by pressing Ctrl-C twice.

If your phone system type is "ESI CS or IP Server 900", there is another section on this screen, TAPI Diagnostic Tools. Please do not use these unless directed by technical support.

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