

# CommConnect User's Guide

The purpose of this document is to provide the guidance to install and setup the features of CommConnect. Detailed instructions for specific CRM integrations can be found under the application's Help button in the Integration window.

For the necessary and common setup information look for the asterisk \* in the table of contents.

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# Technical Requirements

## *CommConnect Versions*

- MS Windows - version 4.3.1.6565 or higher
- macOS – version 5.3.6 13107 or higher

## *Supported Operating Systems*

- Windows Server 2022 Desktop Experience Edition
- Windows Server 2019 Desktop Experience Edition
- Windows 11
- Windows 10 (1809 or higher)

## *Minimum Hardware Requirements*

- 64 bit Intel or AMD Processor
- SVGA display
- 2GB Memory
- 1GB free hard drive space
- Network adapter connected to a TCP/IP network
- Keyboard and mouse

Note: ultra-wide monitors not supported

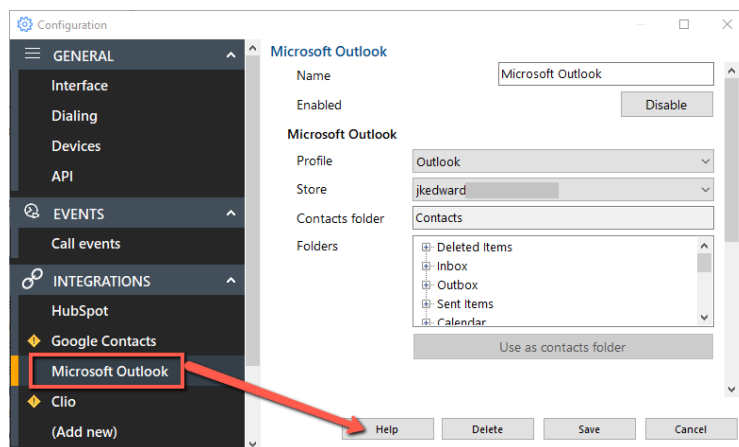
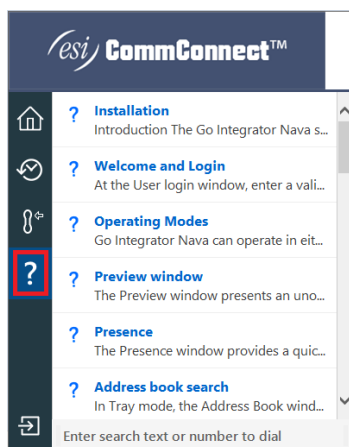
## *Supported Internet Browsers*

For web dialing support

Browser	Supported Versions	Extension / Add-on
Internet Explorer (PC)	Not Supported	Telephone Number Detection 1.2.5
Microsoft Edge (PC)	87.X	Telephone Number Detection 1.2.5
Google Chrome (PC)	86.X	Telephone Number Detection 1.2.5
Mozilla Firefox (PC)	86.X	Telephone Number Detection 1.2.5
Opera (PC)	72.X	Telephone Number Detection 1.2.5

# Help

Information not described in this Guide can be found in CommConnect's online Help Guide. For general help click the Help icon in the main screen. For help with a specific CRM integration click on the Help button in the Integration screen. The webpage that launches will be based on the CRM you've chosen.



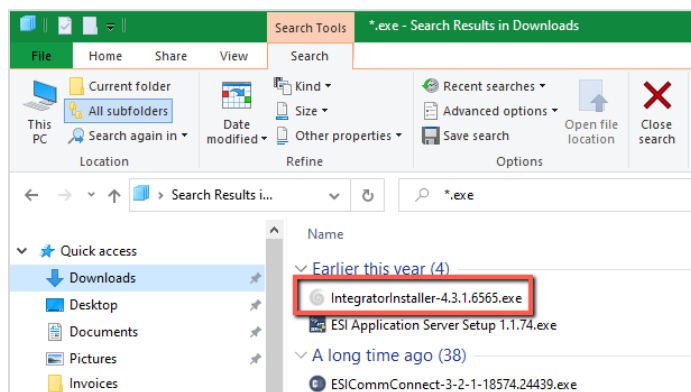
# Getting Started

Follow the steps on the next few pages to Install and Configure CommConnect.

## Step 1: Download CommConnect \*

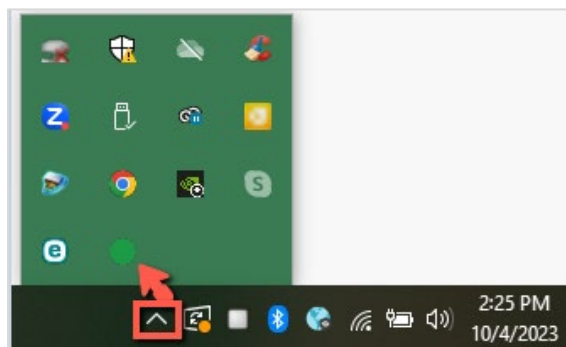
1. Click on the installer link provided to you by ESI. This will save an .exe file to your PC.
2. Click on the .exe file that was downloaded to your PC to start the install process.

**Note:** CommConnect is a Windows and macOS based program, therefore it will need to be installed on each PC/mac that plans to use the application.



## Step 2: Install CommConnect \*

1. Click on the .exe file from the Step 1.
2. Choose 'Run' and accept the Terms and Conditions.
3. During the installation process you'll be asked the following:
  - **Access code**
    - Windows: NESI
    - macOS: NESI-MAC
  - **Username & Password:** these are the same credentials as those you use for Console or ePhoneGO2.  
**Note:** If you log into eConsole using Google, Microsoft or Apple SSO (single sign-on) then use those credentials for your username and password.
  - **License key:** you'll receive this key from ESI. It's unique to each customer / site.
  - **Device Selection:** a list of the devices you have associated with your extension will be listed. Place a checkmark next to which devices you want to use with CommConnect.
    - Acrobats device is the ESI ePhoneGo2 mobile app
    - The device listed as "Softphone" is the device that is built into CommConnect. You can use this Softphone if desired but we strongly recommend using the ESI Webphone (the eCloud softphone).
    - You'll be able to come back to the device list and change your selections if desired.
4. When you've completed the installation the app doesn't pop-up or put an icon on your PC's desktop like other applications. You'll access the app from an icon in the system tray of your PC. We'll explain this in Step 3.

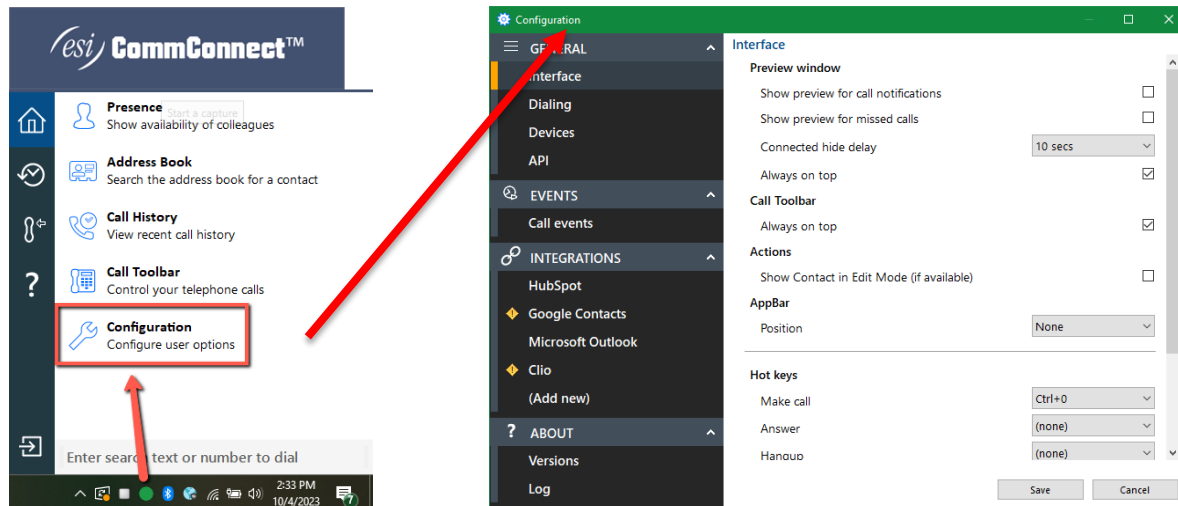


# Configure CommConnect

1. Right click on the app's circle icon in the system tray.

While there are several selections we'll focus on Configuration for this section of the manual. It's essential to read through the remaining steps below.

2. Click Configuration, which will present the configuration window.
3. We'll go through each left-hand menu selection in the steps below.



## Step 3: Interface \*

The most common user-defined parameters are within the "Interface" settings.

**Interface**

**Preview window**

Show preview for call notifications ☐

Show preview for missed calls ☐

Connected hide delay 10 secs ▾

Always on top ☒

**Call Toolbar**

Always on top ☒

**Actions**

Show Contact in Edit Mode (if available) ☐

**AppBar**

Position None ▾

---

**Hot keys**

Make call Ctrl+0 ▾

Answer (none) ▾

Hangup (none) ▾

---

**Application load**

Start automatically with Windows ☒

**Localization**

Language English (US) ▾

Save Cancel

### Preview window \*

Controls the behavior of the Preview Window.

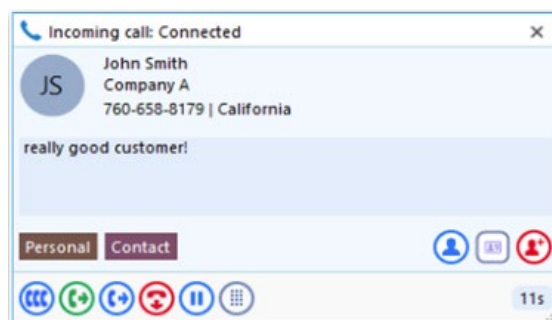
By default, the Preview Window is used to present incoming and outgoing call information and controls. If the Call Toolbar is preferred then the Preview Window can be disabled (uncheck the box).

However, the Call Toolbar does not display any missed call information so the Missed Call Notification preview window can be enabled separately to the main preview window.

The main Preview Window is designed to be as unobtrusive as possible, so will automatically hide once a call is answered and in progress. Hovering over the Tray icon or AppBar status icon will bring the Preview Window back into view during a call.

The default hide delay is 10 seconds but can be increased or disabled (set to "infinite") to keep the Preview window permanently in view for the duration of the call.

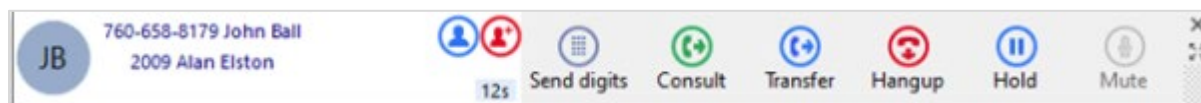
The Preview Window will display in front of other windows but without taking focus from the current application in use. When "Always on top" is enabled the Preview Window will remain in view whilst continuing to work on the current application.



## Call Toolbar

**Note:** The call toolbar within CommConnect may be something you want to use but it's not necessary because you are using ESI's eCloud service, which provides its own Webphone.

When the Call Toolbar is docked to the top or bottom of the screen, it will be permanently in view.



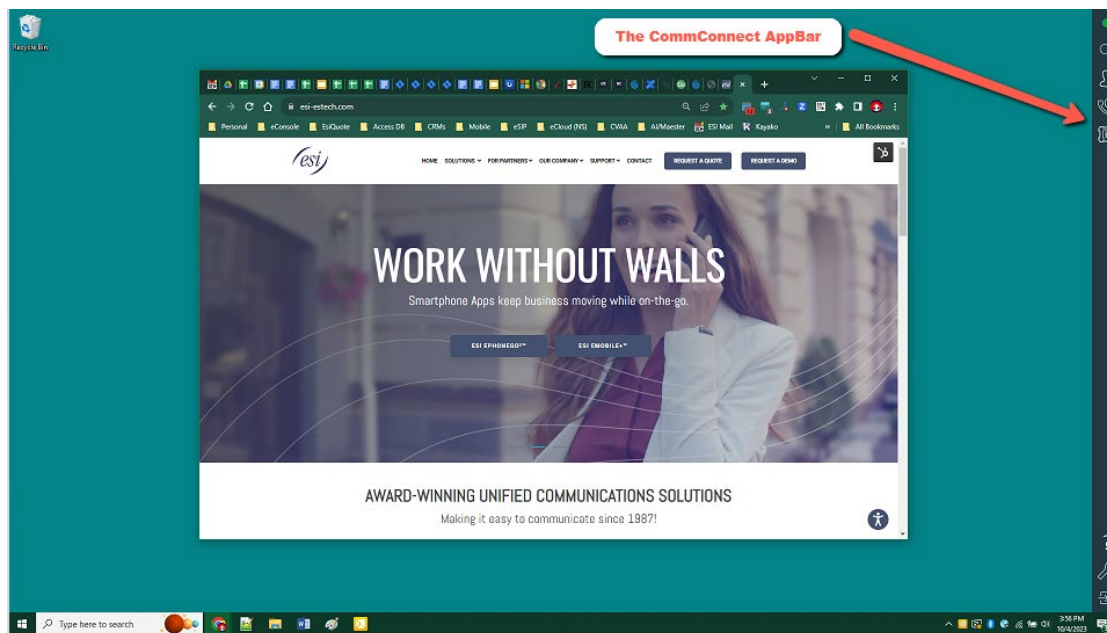
However, if the Call Toolbar is not docked, it can either remain in view in front of the current application in use (default - "Always on top") or can be treated as any other application and remain out of view until selected.

## Actions

Depending on the address book location, matching contacts are displayed in "standard" mode if opened by clicking the contact icon. With "Show Contact in Edit Mode" enabled, the contact is opened in "edit" mode, if available.

## AppBar

By default CommConnect can be access from the system tray as described earlier in this guide. However you may wish to use the AppBar instead, which places the CommConnect window to the left or right of monitor as shown below.



## Hot Keys

Assign keystroke combinations to Make call, Answer and Hang up:

**Note:** All hotkey combinations require CTRL, SHIFT or CTRL+SHIFT to be included

Hot keys	
Make call	(none) ▼
Answer	Ctrl+Enter ▼
Hangup	Ctrl+End ▼



## Application load \*

Enable this option to have the software start automatically when you log on to your computer.

Application load: ☒ Start automatically with Windows

## Localization

Sixteen languages are available or check auto-detect, which will use the language set for your PC.

## *Step 4: Dialing Settings*

Manage outbound calling methods and outbound number presentation:

NOTE: Different dialing methods are offered for varying application types. Not all applications will support all dialing types.

## Clipboard Dialing \*

Enables quick dialing by selecting telephone numbers and copying, either by key sequence (CTRL + C) or mouse click (right-click on the number and choose copy).

1. After the number is copied to the clipboard, a dial prompt notification appears in the corner of the screen.
2. Click the call button to initiate the outgoing call.
3. The pop-up prompt appears in the same location as the Preview Window – drag to a different corner to change where the notification appears

Dialing

**Dialing methods**

Clipboard dialing ☒

Focus dialing ☒

Application dialing ☒

ScreenRead dialing ☒

Applications to use dialing from:

Application	Form	Text box
-------------	------	----------

Add Edit Remove

**Dialing helpers**

Browser extension Download

TAPI driver (dial only) Disable

CallTo protocol handler Enable

TAPI request handler Disable

Save Cancel

## Focus Dialing

Presents a dial icon within compatible applications for any field in focus containing a telephone number.

1. Click the dial icon to initiate the outgoing call.

**Note:** The field must first be selected or in "focus" for the dial icon to appear and the telephone number must be in a valid format.

## Application Dialing

Presents a dial icon within compatible applications by hovering the cursor over a valid telephone number.

1. Click the dial icon to initiate the outgoing call.

**Note:** Application dialing requires configuration using the Application Dialing Wizard, as follows.

2. Select "Add" to open the Application Dialing Wizard:
3. With the desired application open, drag the target to the appropriate field:
4. With the target on the telephone number field, the application details and green check will appear:
5. Select "Next", and then "Save".

Applications configured using the dialing wizard are displayed in the dialing menu.

## ScreenRead Dialing

Enables any valid telephone number, detected through image analysis, to be dialed.

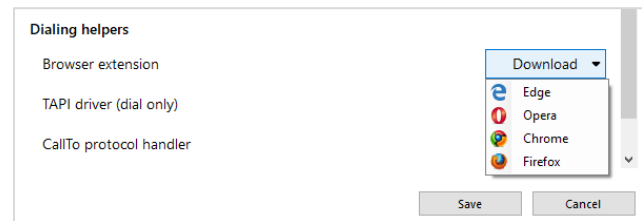
Move the mouse cursor over the telephone number you wish to dial and hold CTRL-SHIFT. The orange detection box appears and attempts to detect a valid telephone number. If the number is successfully detected, the telephone number will be converted to a Click-to-dial field – just click to initiate the outgoing call.

**Note:** Telephone numbers are not always detectable within images due to font style, alignment or image clarity.

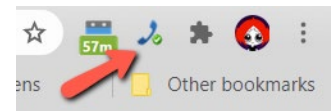
## Dialing Helpers: Browser Extensions \*

Select a Browser extension or enable traditional telephony dialing interfaces:

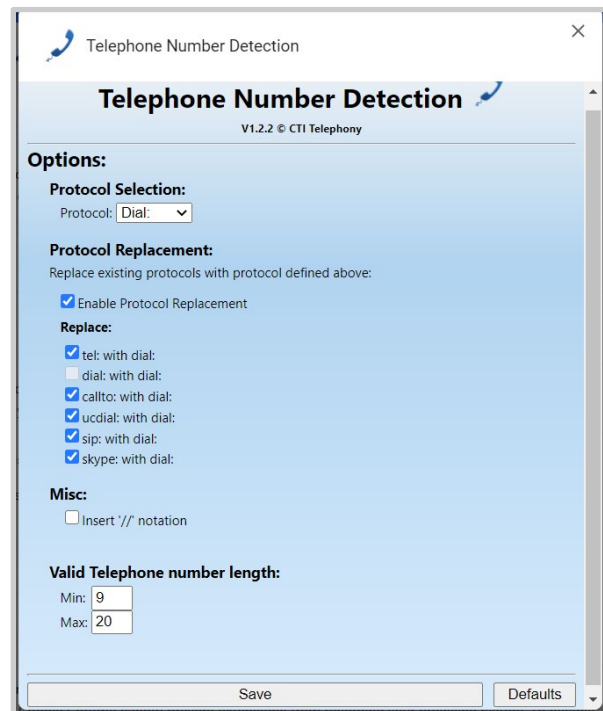
This section will guide you through the process of configuring the browser extension/add-in for web page dialing. The example below is for Google Chrome. Edge, Mozilla, and Opera have similar setups.



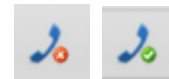
1. Right click on the CommConnect icon in the system tray and select Configuration.
2. Select Dialing and choose Google from the drop down menu by Browser Extension.
3. Click the “Add to Chrome” button, which will add the Extension to the right of the URL/Search field in Chrome.



4. Right-click on the handset icon in the browser (which may be hiding behind the puzzle piece icon) and select Options.
5. To account for all possible click-to-dial scenarios, select all available checkboxes.
6. The Min and Max number count can be adjusted based on personal preference. For example, if you dial international numbers the maximum number may need to be longer.
7. Click Save. There is no confirmation that you saved but rest assured if you click the Save button your choices are saved.



8. Be sure to click on the icon in the browser so it shows a green checkmark. This means the dialer is active. If it shows a red checkmark it's inactive.



### Placing a Call using web dialing

With the dialer active, numbers on webpages will be highlighted with a handset icon as shown in picture below. Note that the zip code is highlighted but is obviously not a phone number. This is because this user set the minimum number in the dialer options to eight.

3500 Gaston Ave., Dallas, TX 75246-2017 | 1.844.BSW.DOCS (1.844.279.3627)

Click the handset icon to place the call. You may receive a popup, like the one shown below. If so, check the checkbox if one is provided and then click Open PhoneHelper.

Whether or not you see a popup or the popup has a checkbox (so you don't continue to see the popup in the future) depends on the browser and sometimes the version of the browser. ESI nor CommConnect has control over this popup.

#### Open PhoneHelper?

https://www.bswhealth.com wants to open this application.

☒ Always allow www.bswhealth.com to open links of this type in the associated app

Open PhoneHelper

Cancel

Method	Description	Expected behavior	Typical use
Clipboard Dialing	When copying a valid phone number to clipboard.	Each time you copy a valid phone number a small bubble will appear that will ask you if you want to call that number.	Numbers within an email or a document.
App Dialing	Most CRM apps store phone numbers in textboxes. App dialing can be trained to recognize these fields and place a dial button alongside them.	Once CommConnect has learned your app, you will see one of two options. Either a dial button appears on the right hand side of a textbox, or you will have to hover with your mouse above that textbox in which case the Dial and Hang up buttons will appear also on the right hand side of the textbox.	Windows PC apps (e.g. Microsoft Outlook's Contacts).
Focus Dialing	Dynamically scans and recognizes any numbers in textboxes that look like phone numbers.	It will highlight any valid phone number within a textbox you have clicked on (based on the criteria you've set) and provide you with three options: Dial, Hung up and Dismiss buttons.	Windows-based apps.  Use only if the App dialing option is not appropriate.

**Note:** For more information on valid telephone numbers see Criteria section via CommConnect's Help button.

## **Browser Extensions for Dialing**

Method	Description	Expected behavior	Typical use
Internet Explorer (native)	Not Supported	Not Supported	Not Supported
Microsoft Edge (extension)	To dial a phone number directly from Edge.  For configuration details, click here.	After enabling the extension, you will be able to control (via Edge Toolbar) whether or not you want the extension to turn valid phone numbers into dial-able hyperlinks.	If you use a web-based CRM or visiting websites with contact details that include phone numbers that you want to dial.
Google Chrome (extension)	To dial a phone number directly from Google Chrome.  For configuration details, click here.	After installing and enabling the extension you will be able to control (via Chrome Toolbar) whether or not you want the extension to turn valid phone numbers into dial-able hyperlinks.	If you use a web-based CRM or visiting websites with contact details that include phone numbers that you want to dial.
Mozilla Firefox (add-on)	To dial a phone number directly from Mozilla Firefox.  For configuration details, click here.	After enabling the add-on, you will be able to control whether or not you want the extension to turn valid phone numbers into dial-able hyperlinks.	If you use a web-based CRM or visiting websites with contact details that include phone numbers that you want to dial.

## **TAPI Dialers**

Method	Description	Expected behavior	Typical use
TAPI driver (dial only)	This option refers to any application that supports/allows TAPI dialing.	Once you have enabled TAPI and configured your CRM app, you will be able to dial out phone numbers directly from the CRM.	Provides a TAPI (dial only) driver to handle call requests from such CRMs to the telephone system. (i.e., Goldmine)
CallTo protocol handler	CallTo is a protocol used for marking up telephone numbers.	By enabling this option CommConnect Client will identify the CallTo protocol and use the marked parameters (e.g. CallTo:[0123456789]) to handle the "Dial" request via our in-built PhoneHelper.exe application.	Supports CallTo protocol to handle call requests like with the Maximizer app.

## Step 5: Devices

You may have already made these selections when first connecting to CommConnect. Regardless you create new selections or makes edits in the Configuration window. When the eCloud system user has multiple devices configured and available, users can select which will be the Preferred Device used to make and receive calls.

### Device Endpoints

A list of the devices you have associated with your extension will be listed. Place a checkmark next to the devices you want to use with CommConnect.

- Acrobits device is the ESI ePhoneGo2 mobile app.
- The device listed as “Softphone” is the device built-in to CommConnect. You can use this if desired but we recommend using ESI's Webphone from eConsole.

Devices

Microsoft Teams

Use for presence☒

Allow calls to be made☒

Publish "In a call" state☒

Presence

Enable chat through Microsoft Teams☐

Public image service

Use Gravatar☐

Device endpoints

Name	Identity	Type
<input checked="" type="checkbox"/> ESI Webphone	sip:2112wp@esi.inhouse.com	Deskphone
<input checked="" type="checkbox"/> Acrobits SIPIS	sip:2112n@esi.inhouse.com	Deskphone
<input checked="" type="checkbox"/> Estech ePhone8	sip:2112@esi.inhouse.com	Deskphone

Save

Cancel

### Microsoft Teams

ESI offers a separate MS Teams integration, which we recommend over the CommConnect integration. For more information please contact your ESI Sales Rep.

## Step 6: Audio

Configures audio devices and codecs for CommConnect integrated Softphone option. Audio settings are **only applicable** when the built in Softphone option has been enabled. The integrated Softphone is only available to TEAM and UNITE user license levels.

Configuration

GENERAL

Interface

Dialling

Devices

Audio

API

EVENTS

Call events

INTEGRATIONS

(Add new)

ABOUT

Versions

Log

Audio

Devices

Microphone

Speaker

Ringer

Network card

Processing

Echo cancellation

Auto gain control

Noise reduction

Codecs

PCMA

PCMU

GSM

G722

Opus

Microphone (Sennheiser SC230 Control)

Speakers (Sennheiser SC230 Control)

Realtek HD Audio 2nd output (Realtek(R) Auc)

Auto detect

Medium

Medium

Low

PCMA☒

PCMU☒

GSM☐


G722☐

Opus☐


Save

Cancel

## Devices



1. Select the primary microphone, speaker, ringer and network card:
2. For each device, click the selection button: 
3. Then tick the box against the preferred audio device from the list of available audio devices found.
4. Click OK to confirm the selection.

Devices	
Microphone	<input type="text"/> 
Speaker	<input type="text"/> 
Ringer	<input type="text"/> 
Network card	Auto-Detect 

 Microphone ✕

Select the device to use:

☒ Line (2- MG-XU)  
☐ Stereo Mix (Realtek High Definition Audio)  
☐ Internal AUX Jack (NVIDIA High Definition Audio)  
☐ Line (MG-XU)  
☐ Internal AUX Jack (NVIDIA High Definition Audio)  
☐ PC Beep (Realtek High Definition Audio)  
☐ Microphone (HD Pro Webcam C920)  
☐ Microphone (2- Yeti Stereo Microphone)  
☐ Microphone (Realtek High Definition Audio)  
☐ Microphone (HP Webcam HD-4110)  
☐ Internal AUX Jack (NVIDIA High Definition Audio)  
☐ Headset (OontZ Angle 3 Plus Hands-Free)  
☐ Internal AUX Jack (NVIDIA High Definition Audio)  
☐ Internal AUX Jack (NVIDIA High Definition Audio)  
☐ Microphone (Realtek High Definition Audio)  
☐ Line (MG-XU)

## Processing

Make adjustments to Echo cancellation, Auto gain control and Noise reduction:

**Note:** Please refer to IT support before modifying these settings.

Echo cancellation	Medium (250) 
Auto gain control	Medium (30) 
Noise reduction	Low 

## Codecs

Select the audio codec(s) appropriate to the platform in use:

**Note:** Please refer to IT support before modifying these settings.

Codecs	
PCMA	<input checked="" type="checkbox"/>
PCMU	<input checked="" type="checkbox"/>
GSM	<input type="checkbox"/>
G722	<input type="checkbox"/>
Opus	<input type="checkbox"/>

## Step 7: API

Local Http(s) listener(s) for API connections from other software applications, enabled by default.

Toggle "Secure sockets" as enabled or disabled.

## Step 8: Call Events

The Call Events page allows you to change settings relating to actions taken when a call is ringing or is in progress.

### Busylight

Plug and play compatibility with Kuando Busylight. For more information please contact ESI Technical Support.

### Sounds

Incoming call ringing or call waiting can be notified by sound files played through the computer speakers. This can help to uniquely identify which user in an office environment is being presented with a call for either supervisor monitoring or for users that are not deskbound.

NOTE: Only audio files in WAV format are supported. A sound file for each state is included within CommConnect by default and can be selected by the user: "ringing.wav" and "waiting.wav". Click on the ellipses button (three dots), which will automatically take you these files.

The computer sound can be automatically muted whenever a call is in progress - useful for users that work with background music, internet radio etc. to give a more professional response when incoming calls are answered.

Mute speaker when a call in progress

☐

### Custom Events

Customer Events offers more detailed configuration of actions to apply when a call or device changes state.

Custom Events are only available to CommConnect TEAM and UNITE license levels.

Custom events	
Trigger	Action

Call events					
<b>Busylight</b>					
Status	Not connected				
<b>Sounds</b>					
On ringing	<input type="text"/> <input type="button" value="▶"/> <input type="button" value="⋮"/>				
Call waiting	<input type="text"/> <input type="button" value="▶"/> <input type="button" value="⋮"/>				
Mute speaker when a call in progress	<input type="checkbox"/>				
<b>Custom events</b>					
<table border="1"><thead><tr><th>Trigger</th><th>Action</th></tr></thead><tbody><tr><td colspan="2" style="height: 100px;"></td></tr></tbody></table>		Trigger	Action		
Trigger	Action				
<div><input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/></div>					
<div><input type="button" value="Save"/> <input type="button" value="Cancel"/></div>					

Actions available include opening a program or web page for example when a new incoming call is received.

"Triggers" available:

- Category: Call or Device
- State: Ringing, Connected, Completed, Missed or All
- Direction: Inbound, outbound or both
- Scope: Internal calls, external calls or both
- Remote tel: An external telephone number or prefix code that will trigger this event
- Local tel: An internal telephone number or prefix code that will trigger this event

Actions available:

- Run program: Specify a program to run and insert relevant parameters
- Play sound: Specify a unique sound to play when this action is triggered
- Show Message Box: Present the message box including relevant parameters
- Open Web Page: Open the specified URL and insert relevant parameters
- Run Web Service: Run the specified endpoint and insert relevant parameters

For the "Play Sound" action, only a valid .wav audio sound file can be selected.

For all other actions, call or device parameters can be inserted to pass event information to the selected "Program", "Web Page" or "Web service".

For sample testing, the "Show Message Box" Action can be selected and the parameter output displayed to check the values that will be presented for the action.

The "Call" information parameters available are:

**Id**  
**Start**  
**State**  
**Duration**  
**Direction**  
**Remote tel**  
**Remote name**  
**Local tel**  
**Local name**

The "Device" event parameters available are:

**Name**  
**Internal tel**  
**External tel**  
**Hook state**  
**Dnd state**



For the "Program" action, the Parameters box also allows "command line arguments" for the program to be inserted before the event information is included from the drop down parameter lists.

For the "Web Page" action, always include the URI scheme (i.e. http://). Any command line arguments can be inserted before the event information is included from the drop down parameter lists.

For the "Web Service" action, enter the required Endpoint URL to receive the call event data.

Click the "Save" button to store any new/edited information or click the "Cancel" button to discard any new/edited information.

### **Custom Events Setup Guide**

Custom events can be used to pass call information from the CommConnect Client to other software using command line parameters under customer specified conditions. For example, a custom event could create a new call record in a database that automatically includes the incoming caller's telephone number when the call is answered/connected

### **Command Line Parameters**

"Command line" refers to the "Command Line Interface" (CLI), a method of giving instructions to a computer by typing commands one line at a time to perform specific tasks like starting an application. In very basic terms, a "parameter" is simply a definition of something e.g. name = Joe or telephone = 6329603210.

A "command line parameter" is a control parameter that is used by a program to give it specific instructions when started.

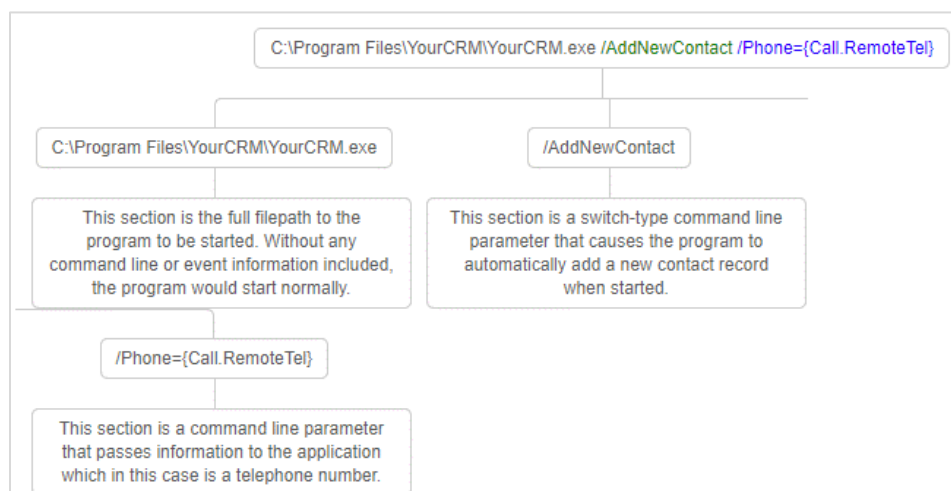
Another type of command line parameter called a "switch" can be used to start the associated program in a certain mode or affect it in some other way e.g. '-editmode' or '/AddNewContact'.

Note that the structure of command line controls can vary between programs. For example, some apps' parameters start with a hyphen character (-) like "-Phone" but other apps use a forward slash (/) instead like "/Phone" etc. Regardless of the program syntax the principle is generally the same.

In addition to the command line parameter, call event information can be included and acted upon by the external Program, Web Page or Web Service.

To use the telephone number of the remote party, as opposed to another extension transferring the call insert the "Call > Remote tel" entry from the drop down list: the item syntax is {Call.RemoteTel}

Here's an example of a typical command line instruction that could be manually entered:



With the above example, CommConnect will open "YourCRM.exe" which will then create a new contact record and insert the external telephone number into the "Phone" field.

You can find the call information names and descriptions in the "Passable Call Information" section below.

### ***Passable Call Information***

The call information that can be passed to external programs or web pages are listed below

Description	Parameter Variable
Call Events	
External telephone number of the calling/called party	{Call.RemoteTel}
Date and time of call start	{Call.Start}
Current call state: Dialback, Dialing, Ringing, Connected, Held, Terminated etc	{Call.State}
Duration of the last call in hh:mm:ss.ns format (can only be used for events at the end of a call - "Completed" state trigger)	{Call.Duration}
Reports "Incoming" or "Outgoing"	{Call.Direction}
Call type: "Mobile Services" etc	{Call.RemoteName}
Internal extension number	{Call.LocalTel}
Internal extension name	{Call.LocalName}
The unique ID of the call	{Call.Id}
Device Events	
Full device username	{Device.OwnerContact.Name}
User Internal device extension number	{Device.OwnerContact.InternalTel}
User External DDI number	{Device.OwnerContact.ExternalTel}
Off Hook, Held etc	{Device.Hookstate}
DND status at current call state: ON / OFF	{Device.DndState}

The call event information must always be enclosed in "{" signs to properly identify the variable, otherwise the information will not be passed correctly. When CommConnect runs the custom event, the call information is inserted into the parameter in place of the parameter variable e.g. if the external caller's telephone number is 06329603210 then telephone = {Call.RemoteCall} becomes telephone = 06329603210.

### ***Making Changes***

If any changes to a configured custom event are required, highlight the entry in the Custom Events list and click "Edit" to display the event configuration.

If the "Action" needs to be changed, the custom event must be deleted and created again. To delete a custom event, highlight it in the list, click "Remove" and then "Save".

## Step 9: Integrations \*

Integrations connect a CRM or application with the eCloud system. Incoming or outgoing telephone numbers are matched to any contact records in a CRM to present contact information including contact name, company or account name and additional notes.

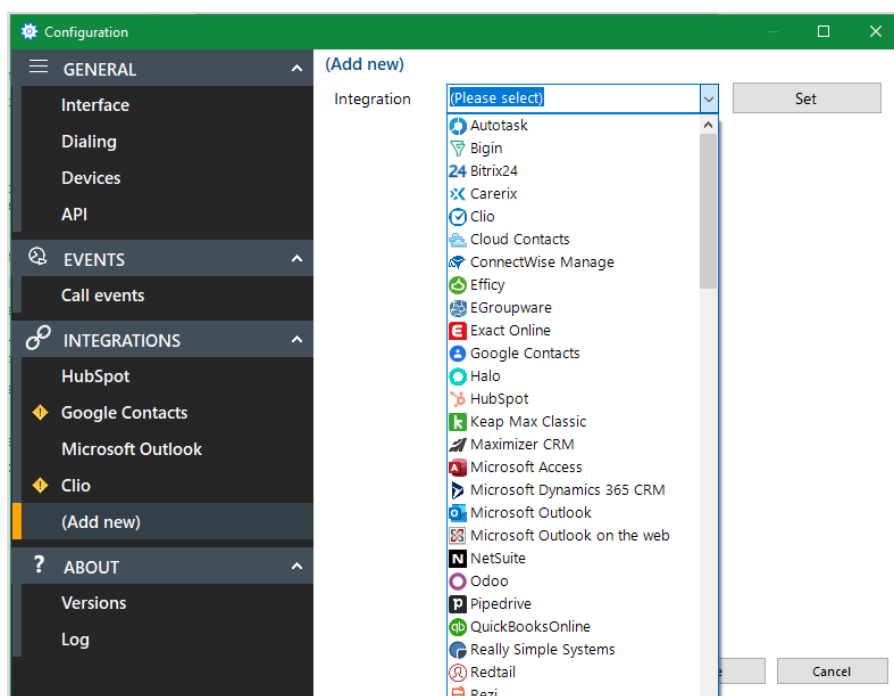
Any CommConnect user can integrate with Google Contacts and Outlook Contacts. To integrate with MS Teams you'll need a TEAM license. To integration with CRMs you'll need a UNITE license.

The integration provides address book searching, incoming call preview information, manual and automatic contact popping and in many cases, activity logging.

Each CRM integration setup is slightly different. In Step 9 we'll discuss the common setup fields.

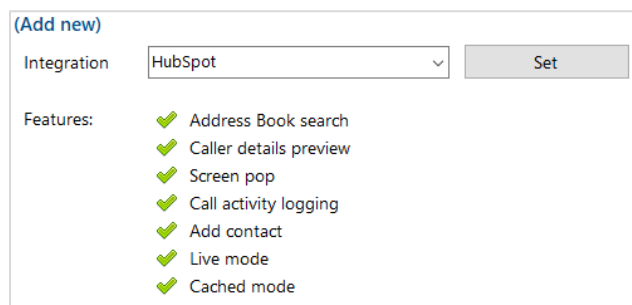
### Setup CRM Integration

1. Select "(Add new)" and choose the desired CRM.
  - New v4 integrations are marked with a star icon and may include additional features such as the option to "Add Contact" information directly into the address book from the Preview Window, Call Toolbar or Call History (including the Recent Calls list).



**Note:** Only "Standard" integrations are displayed in the list. Other applications or "Controlled" integrations require an unlock code. ESI would've provided you with this code. For assistance contact ESI eCloud Support.

2. In our example we'll choose Hubspot.
3. Click SET to continue to the setup screen for the selected integration. You can SAVE now and come back into the Configuration window or SAVE at the end of these instructions.



4. Once you click SET the screen will change to show various selections. Each CRM is different in regards to the information it needs for validation. Hubspot, as shown below, needs an Access Token. Whereas Outlook and Google Contacts, for example, simply needs your login in credentials.
  - To obtain the details of CRM criteria click the HELP button at the bottom of this view. For example, if you click HELP on this screen while you have Hubspot selected as your CRM, a webpage will open to give you setup directions for Hubspot. If you had Salesforce selected you'd receive Salesforce setup directions.
5. Most users do not select caching because it's not needed. If the application allows it, the contact database can be downloaded and cached to accelerate contact searches for matching telephone numbers from within CommConnect. The frequency of downloading the data can be configured between 1 – 100 minutes. The Status shows when the last download occurred and how many records were downloaded.
6. If you want the caller's account page in the CRM to appear automatically, select either
  - Ringing – account page will appear while call is ringing
  - Answer – account page will appear when call is answered
8. If the CRM supports creating a call log record (in the CRM) you must enable this checkbox. If the CRM doesn't support this feature the checkbox will not be clickable (grayed out).
9. Click the CHECK button to test the setup. It should come back as "Loaded".
10. Lastly, click the TEST button to validate the CRM integration.
  - Enter a phone number you know exists in the CRM.
  - Click Search
  - After a few seconds it should come back with a contact it found in the CRM.
11. Click SAVE.

**HubSpot**

Name

Enabled

**HubSpot**

Access Token

Owner of new records

☐ Use exhaustive company search (slow)

Entities

☒ Contacts

☒ Companies

**Caching**

Cache ☐

Cache frequency, minutes

Status:

**Activities**

Pop automatically on inbound

Create activity on call end ☒

Allow manual creation of call activities ☐

**Integration test**

Check connection

Test search

**Test search**

Telephone

Name	Company	Job title	Telephone	Mobile	Email
Julia Gulia	McKinney	ESI	21444		@gmail.com

### Delete or Disable the Integration

To delete the integration click DELETE at the bottom of the selection CRM in the Confirmation window.

To temporarily disable the integration click DISABLE under the CRM name.

**HubSpot**

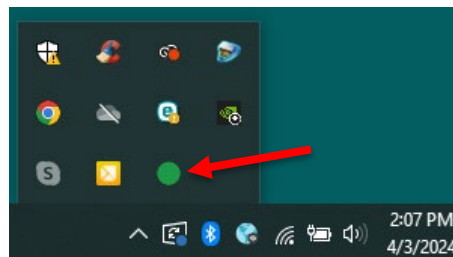
Name

Enabled

# Using CommConnect

## Tray Menu \*

To access the app right click on the box that appears in the system tray in the lower right corner of the PC. The box icon will appear white or gray upon initial installation.



Once the application is configured the color of the square changes to indicate the following:



= idle



= on a call, busy

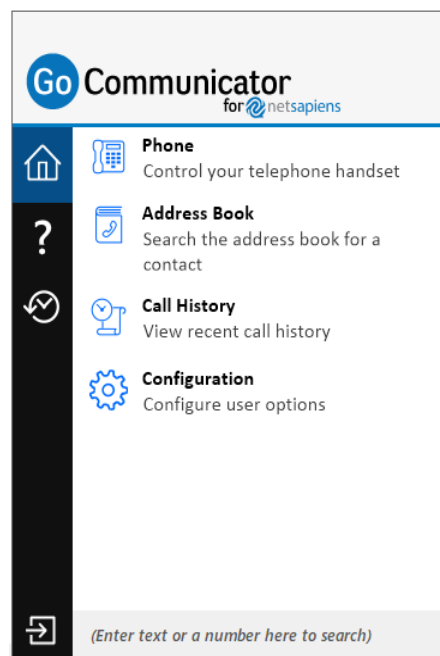


= incoming ringing call

## Menu

Right click on the square icon in the system tray to access the features described below.

**Note:** In Windows 7 and above, some tray icons become hidden and expressly have to be shown. These settings are stored in the "Notification Area Icons" part of the Windows Control Panel.

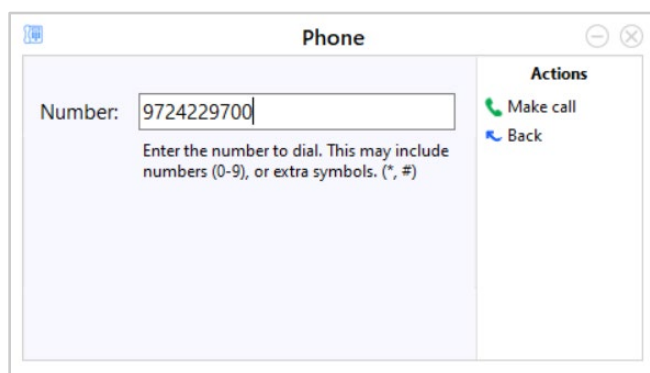


## Phone

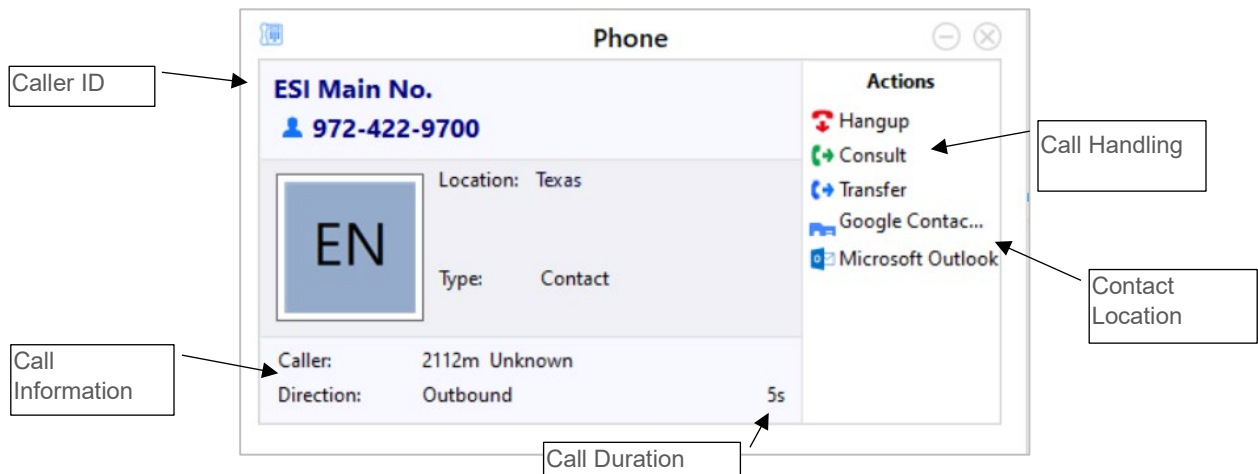
### Outbound Dialing

The phone window is used to control your telephone handset, make phone calls and perform call related actions.

1. When the Phone window is open, enter a phone number from your keyboard.
2. Once you press Enter from your keyboard or click Make Call from the Phone window the call will be attempted, causing your ESI Phone to ring.
3. When you answer this call the digits of the number you are trying to call will be sent.



- Once connected to the other party the Phone window will change to show information about the call and call handling options.



### Actions

Use these buttons to interact with the current call, contact and integrated applications.

Icon	Action	Instructions
	Disconnect/Hangup	You can also disconnect my using your ESI Phone.
	Consult	Follow the prompts to create a 3-way conference.
	Transfer	Following the prompts to perform an unsupervised transfer.
<b>Microsoft Outlook</b> <b>Contacts</b>	Contact Location	Click on the CRM where the contact is located for one-click access to the contact's details.

### Address Book

The Address book provides access to a local address book included with the CRM. It's a quick way to find a contact and all the CRMs that contact is located. The Address Book only looks through CRMs that you have connected to CommConnect. In the example below the entered phone number is found in both Google Contacts and Outlook.

Click on the phone number to place an outbound call or click on the contact name to go the contact's information in the CRM.

The screenshot shows the 'Address Book' window with the following details:




- Search:** A search bar containing '9724229700' and a 'Go' button. Below the search bar is the text '(Name, Company name, Telephone number)'.
- Advanced search:** A dropdown menu.
- Google Contacts:** A section showing search results. The first result is 'ESI Main No.' with phone number 'w: 9724229700' and email '@esi-estech.com'.
- Microsoft Outlook:** A section showing search results. The first result is 'ESI Main No.' with phone number 'B: (972) 422-9700' and email '@esi-estech.com'.
- Contacts:** A section showing '(None found)'.








## Call History

Recent and Full call history provides a list of calls made to/from CommConnect or those made through the CRM. By default, the Call History screen returns the fifty most recent calls.

Click on the phone number to place an outbound call or click on the contact name to go to the contact's information in the CRM.

Hovering over a call record will present different options based on the caller ID of the record. These options include dialing the phone number, adding a new contact, and accessing the contact's information within the CRM.

Type	Icon
Inbound Call	
Outbound Call	
Missed Call	

		Celebrity Law Inc. 8477022774	15:38:11 23s
		Angela Smith, Acme, Inc. / 2144489504	  

## *Adding New Contacts*

There are a few places within CommConnect that provide an option to "Create New Contact". Doing so will add the contact to the CommConnect application only. It does not add a new contact to the CRM (Outlook, Hubspot, etc.).