

ESI eCloud

ESI eTeams™ User's Guide

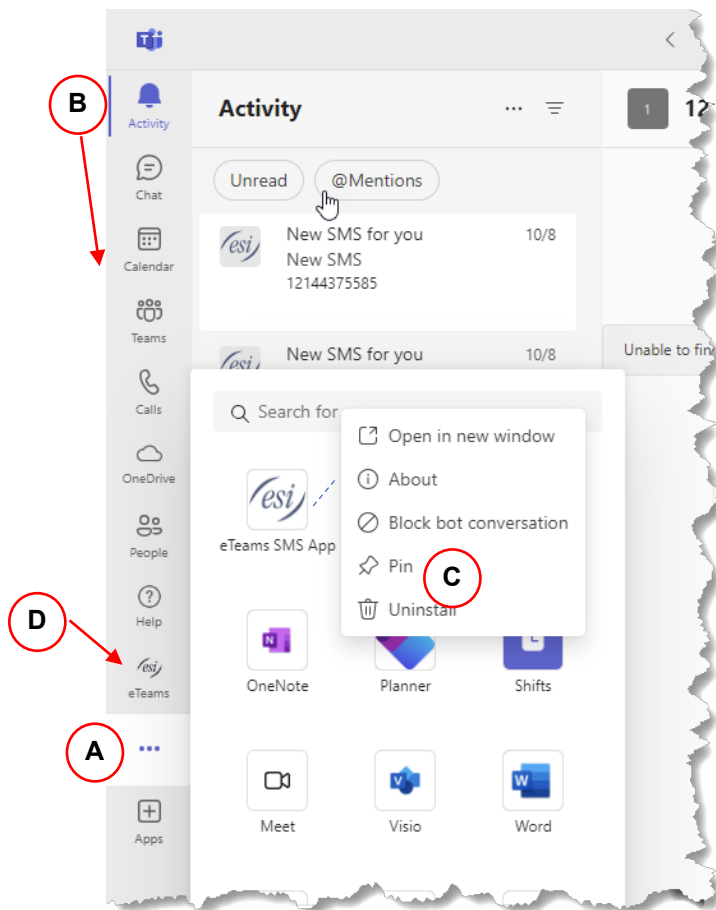
This document helps the end-user get the most out of the ESI eTeams application when used with the ESI eCloud phone system.

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Adding ESI Apps to the Teams Command Ribbon

To get started you first need to add the ESI eTeams Connector and eTeams SMS Connector (if you're texting to/from Teams) to the Command Ribbon (left bar/panel in Teams).



To add the ESI apps

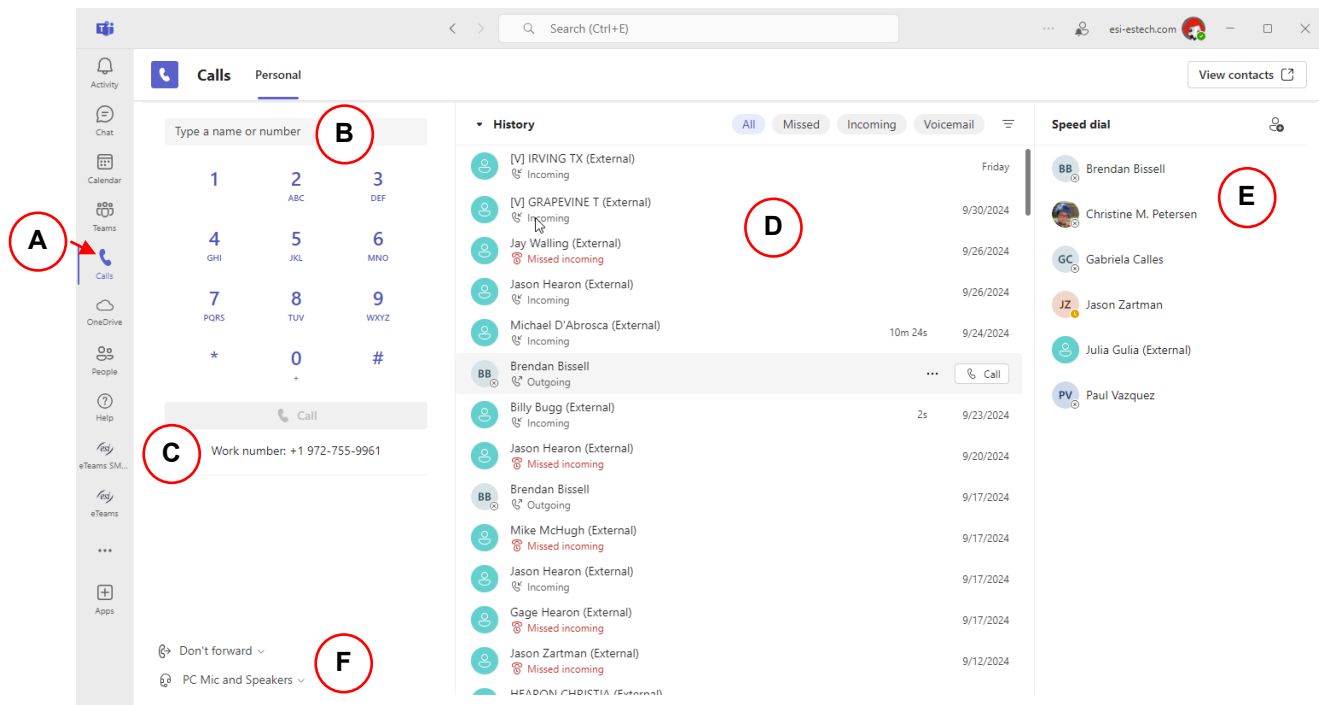
1. Click on the Ellipses (A - 3 dots) toward the bottom of the Command Ribbon (B).
2. You'll see a selection for both ESI apps.
3. We recommend pinning them to the ribbon so they're easily accessible. To pin an app, right click the desired app and choose Pin (C).
4. You'll now see the apps in the ribbon (D).

Calling To/From Teams

The following summarizes that panel and offers suggestions that will improve the user experience.

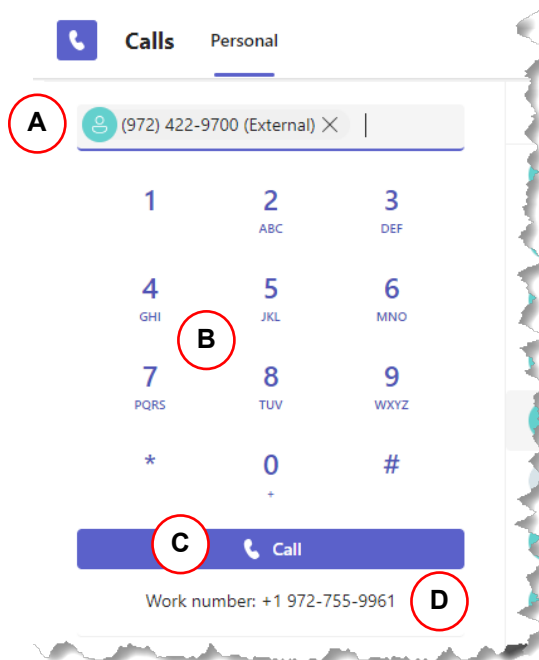
Calls Window Layout

- A. Calls App: location of the Calls app in the command ribbon.
- B. Dial Pad: where you enter numbers you want to call.
- C. Your Business Phone Number (aka DID): this is your number that those you call will see as your Caller ID.
- D. Call History: a list of calls made to/from your number.
- E. Speed Dials: contacts you select as "Speed Dials" will appear here.
- F. Call Settings and Audio Controls – various settings on how to manage calls.



Dial Pad Area

The Dial Pad Area provides the user with the primary means for making calls, be it to other persons in their company or with customers, partners and clients that require “dialing” a 10-digit number. Using the dial pad is the same as using a softphone. There are a few ways to start a call.



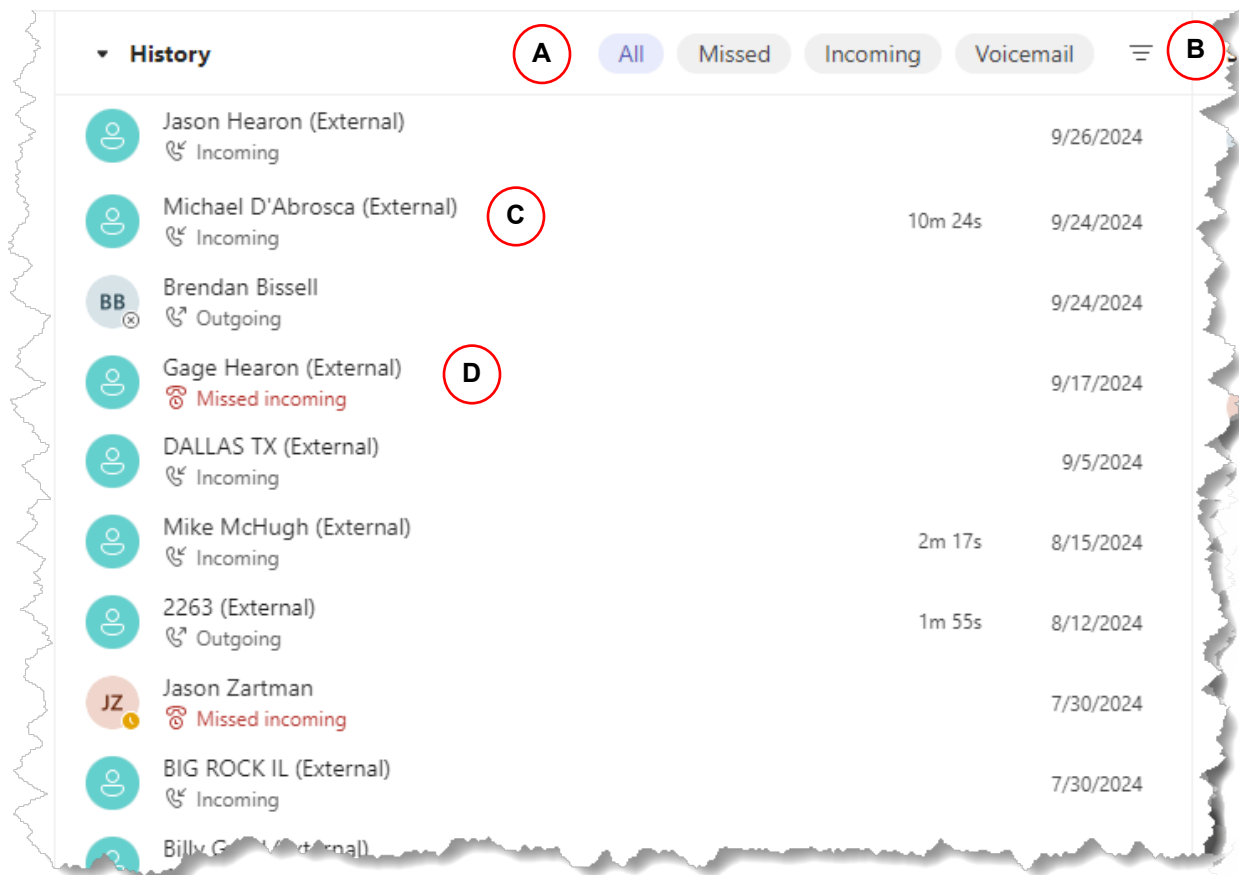
- A. Type a name or number: using your keyboard or numeric keypad, type the number of the person you want to call. If the name is in the Teams system for your company, can type the contact name and the system will bring up the contact information. You can also copy/paste a number in this field.
- B. Dial Pad: Use the mouse to click the digits of the number you want to call.
- C. Call: After entering a number, the user clicks on the Call button to place the call.
- D. Business Work Number: This number is a direct dial number that will route calls directly to you. When making a call, the ESI eCloud presents this number if the business has not selected a branded number for presenting. For example, callers from ESI, who use the eCloud, have the setting set so that their calls show “972-422-9700.” Alternatively, ESI can use the direct dial work number as the calling number for outbound calls.

Note: You can also make outbound calls by clicking on a number from the call history, a number in the speed dials, or a number in the “other contacts” area.

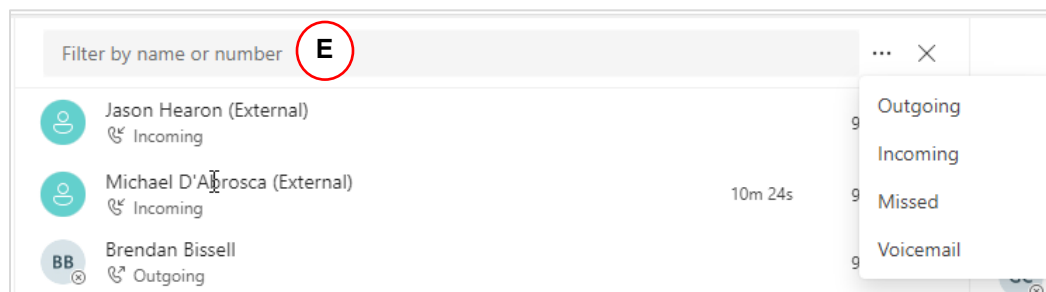
Call handling options, such as, hold and transfer as well as Setting, like call forward are discussed further in this document in section [Call Handling Options & Audio Settings](#).

Call History Area

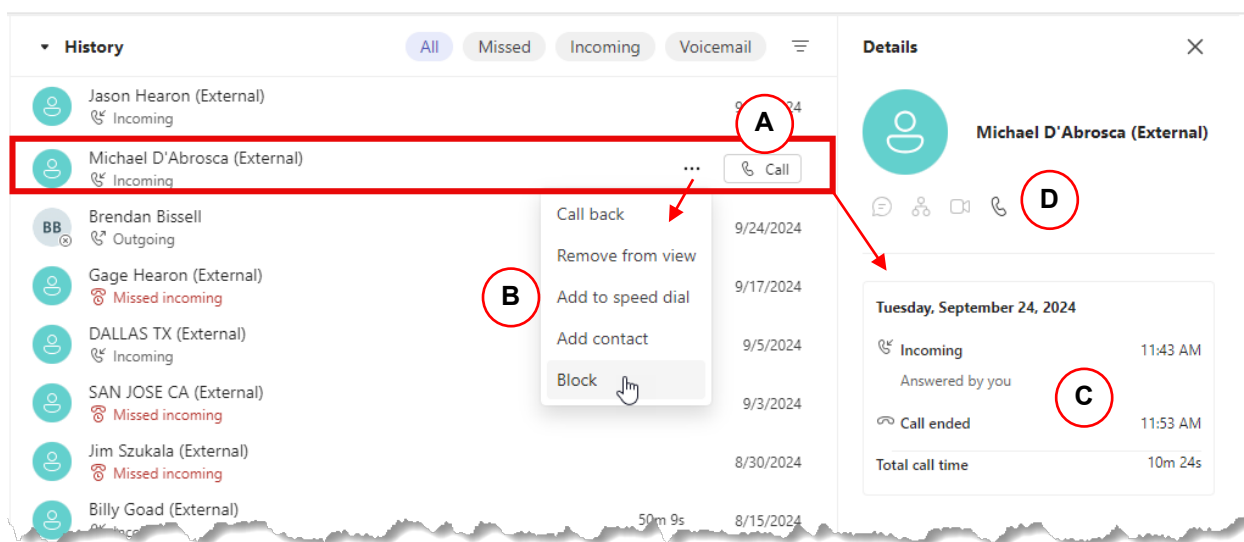
The Call History Area provides the user with the listing of all calls and a filter for inbound, missed, and voicemail. Standard information shown for each call includes name, number, call type, call direction, duration, date.



- A. Filter: All calls are shown by default. You can select the buttons in this area to filter by missed and incoming calls as well as those calls that left a voicemail.
- B. Additional Filter Options: Using the arrow you can filter by Incoming and Outgoing calls. Incoming calls are those that were answered or not.
- C. Incoming: Example of an incoming call log.
- D. Missed: An example of a missed call, which are those calls not answered using the Teams client. Calls answered by the user with a desk phone or mobile phone that aligns with their extension will see these calls in this category, even though they were answered by another device.
- E. As shown below, you can also filter by name and number when clicking on the additional search options



Selecting a specific call will display call details and actions on how to handle the call log entry.



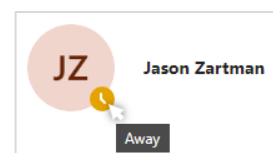
A. Call Button: Click the Call button to place a call back to the caller.

B. Handling Options:





- *Call Back*: performs the same action as clicking on the Call button.
- *Remove from view*: This will remove the call record from the call history list but will not remove a record of the call from the phone system.
- *Add to speed dial*: Will instantly add the number to your speed dial list.
- *Add contact*: Will present a popup window to enter basic contact information in order to add this number to your contacts.
- *Block*: will block the external number from reaching you. Internal numbers (extensions) cannot be blocked.

C. Call Details: Details for this call appear in this area.

- If the other party in the call is on the ESI eCloud system, the small circle on the left side of their image/avatar includes the *current* value of their presence indicator (see pic of Zartman to the left). In this example above is a person calling from outside the eCloud system, so there is not a presence value to indicate.



D. Actions: The icons under the circle/avatar shows the various ways you can make contact with the caller. available for the number are based on the type of user

Action	eTeams Participant	Non-eTeams Participant
Chat 	Yes	No
Organization 	Yes	No
Video 	Yes	Yes*
Call 	Yes	Yes

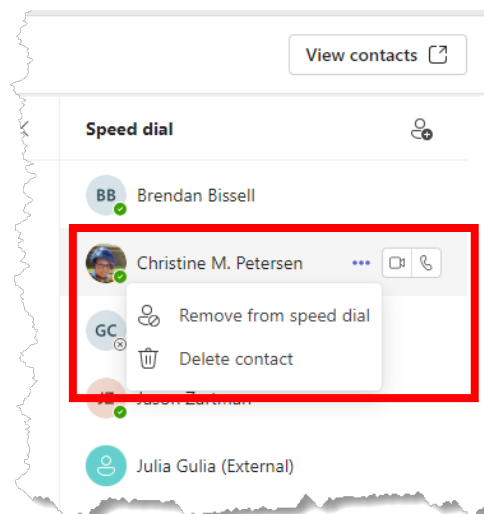
*If the device they're using supports video.

Speed Dial Area

The Speed Dial Area allows the user to place commonly called numbers and relevant features for easy one-click access.

Contacts

To add a contact to the speed dial list simply locate that contact under People and choose “Add to speed dial”. In the speed dial list you can choose to call, video call, remove them from the list, delete the contact altogether and see the availability status.

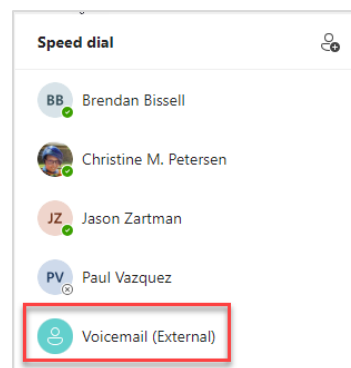


Feature Codes

The call handling features listed below are commonly performed from the ESI desktop phone with the press of single, pre-programmed button. However these buttons are not available in the Teams softphone. Therefore ESI recommends setting relevant features as Speed Dial numbers. The following features are good candidates for this service:

Service	Feature Code Sequence
Voicemail	*97
Parked Call Retrieval	*1110
Do not disturb – activation	*78
Do not disturb – deactivation	*79
Forward all calls – activation	*72
Forward all calls – deactivation	*73
Forward busy calls – activation	*90
Forward busy calls – deactivation	*91

How to setup these codes to appear in the speed dial list is stated in the [Using the ESI eTeams App to Access Voicemail](#) section in this document. Follow the exact same steps but replace the star code based on the desired action in the above table. When done adding the new feature to contacts you'll be able to add them to the speed dial list. In the example to your left, I can click Voicemail to quickly place a call to my ESI Voice mailbox to hear by voicemails.



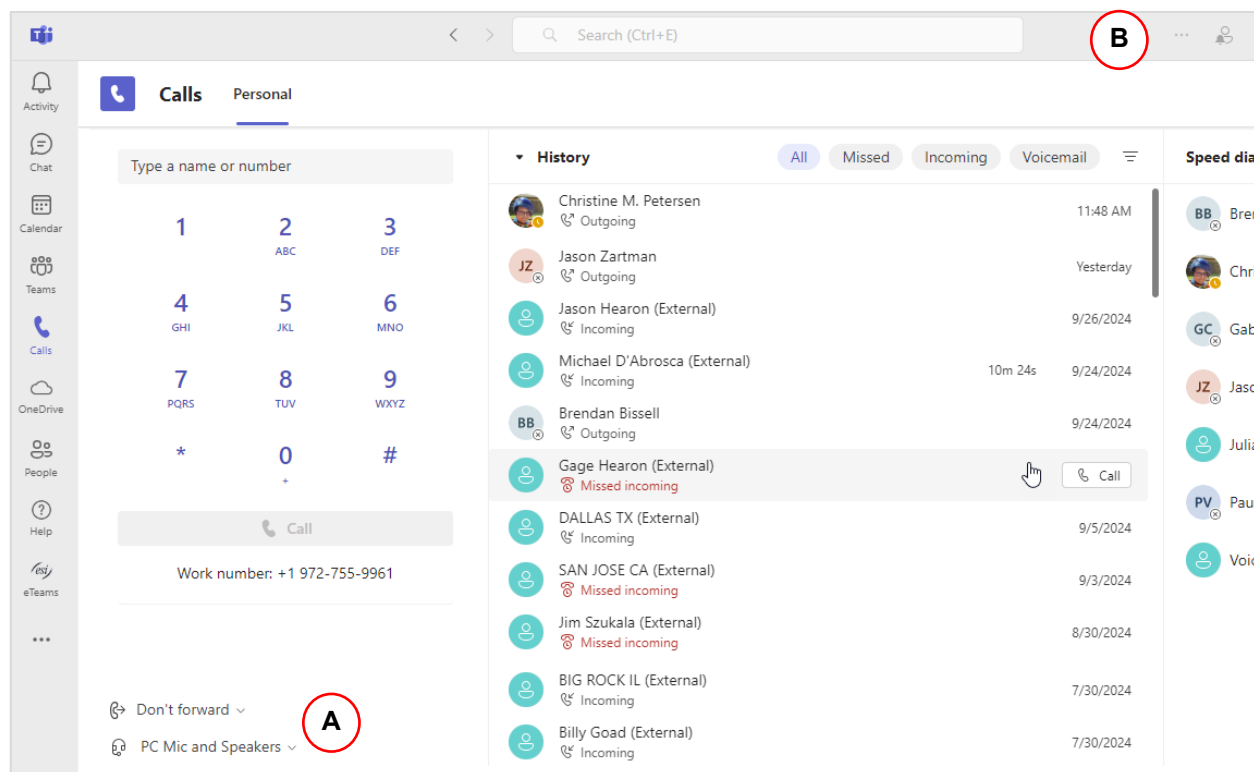
Call and Audio Quick Settings

There are two places in Teams to access Call and Audio Settings.

- A. In the Calls view, quick settings are shown in the lower left.
- B. The full list of settings is shown by clicking the ellipses (3 dots) in the upper right.

Here we will talk about the quick access options (A).

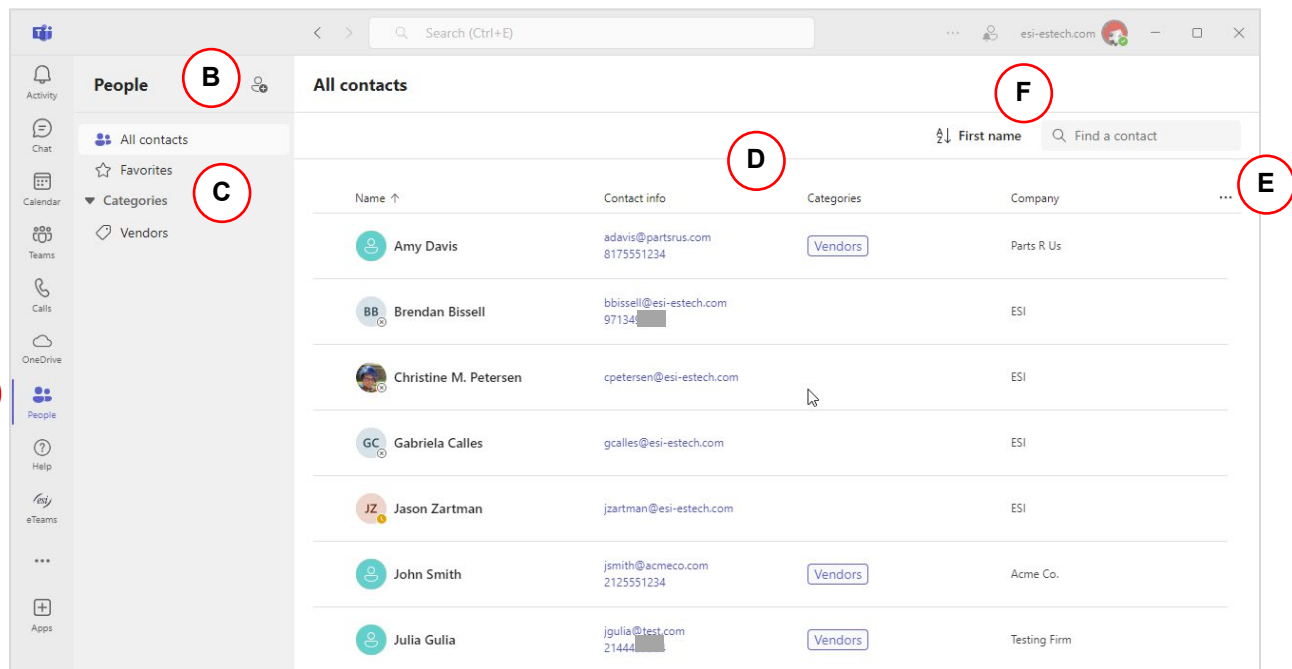
For a review of other options (B) go to the [Configuring Audio Settings for Teams](#) section in this document.



- Don't forward: Your incoming calls will not be forwarded to another destination. They will ring your extension.
- Forward to voicemail: As described in the [Voicemail](#) section of this document, this selection will send all incoming calls to **Teams** voicemail.
- Forward to <03####>: As described in the [Voicemail](#) section of this document, this selection will send all incoming calls to **ESI** voicemail.
- PC Mic and Speakers: Select from audio devices available on your laptop or PC. Setting the device here can occur at any time – before the start of or any time during a call or conference.

People Tab

The People tab is where you manage contacts that you've added to your Teams account.



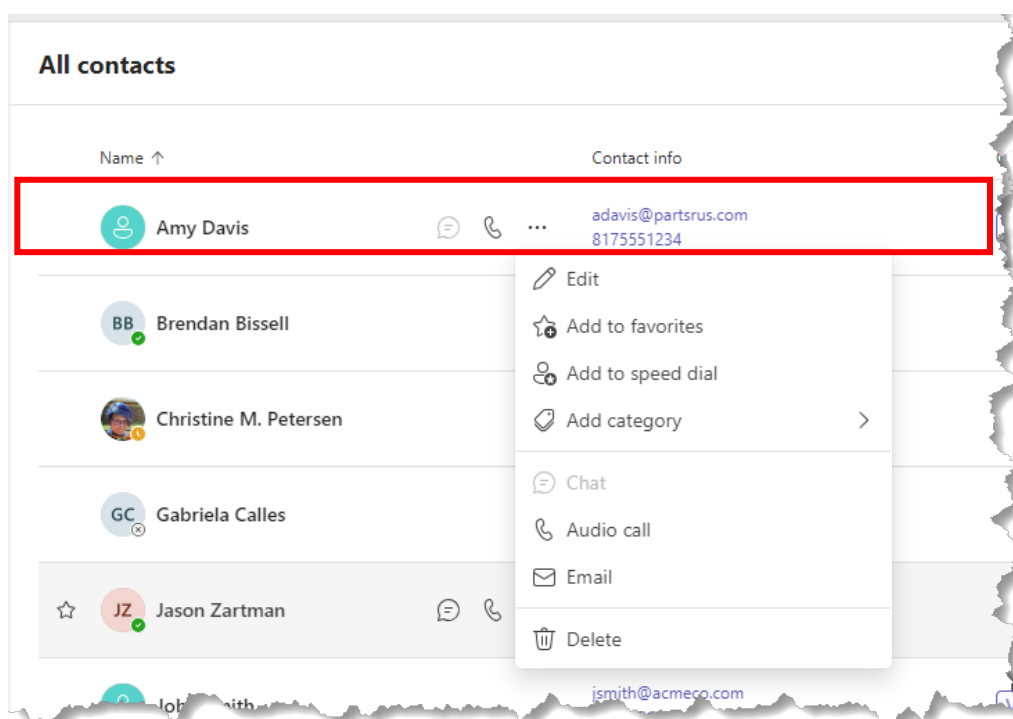
- A. People tab: where you find the contacts list in the command ribbon
- B. Add contacts: clicking on the 'Add People' icon will present a popup window, where you enter contact information for your new contact.
- C. Favorites & Categories: clicking on the appropriate list name will automatically filter the contacts list.
- D. Contact list: the actual list of contacts, which can include the following attributes
 - Name
 - Number
 - Email
 - Category
 - Company
 - Office Location
- E. Column Options: the ellipses (3 dots) will present a list of the available columns. You can select which columns you'd like to view.
- F. Sort & Search: You can search by any attribute associated with a contact. Using the above picture, if I search for "ESI" it will not only show those with the Company Name of "ESI" but also Paul who has "ESI" in his email address.

You can sort by the following attributes, as well as by Ascending/Descending order.

- First or last name
- Company
- Recently added

Contact Details

Various options appear when a contact is selected.



You can connect to the contact by

- Chat: only available for internal contacts (other extensions)
- Call: while the video call option is not shown you can switch to video while on the call
- Email: this option only appear if an email address is present

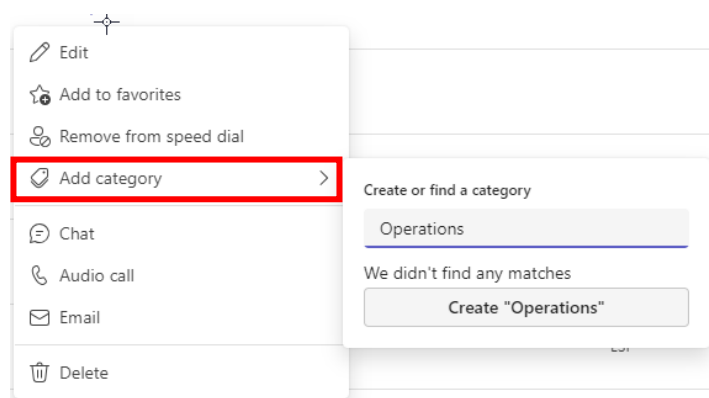
Besides the typical edit and delete options you can also

- Add to Favorites
- Add to speed dial
- Add category: single contact can only be in one category

Creating a Category

1. Select the desired contact and click on the ellipses (3 dots)
2. Select Add Category
3. Categories that have already been created will be shown but if what you're looking for is not listed, simply type in the name of your new category and click "Create".

This category will now be an option for all your contacts.



Voicemail

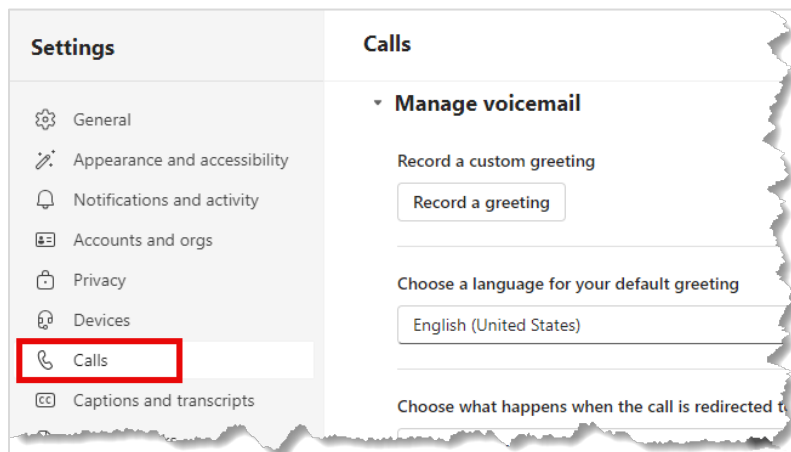
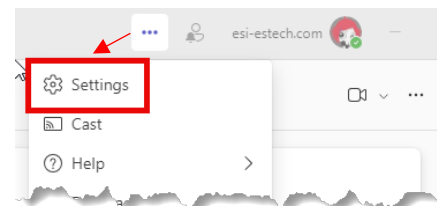
When using Teams you have two choices for voicemail

- [Use Teams Voicemail](#) – you'll receive, manage, and setup voicemail through Teams only. These voicemails will not appear in the ESI eCloud system or dashboard (eConsole).
- [Use ESI Voicemail](#) – you'll set up and use voicemail on the ESI eCloud system like normal but you'll also be able to see these voicemails in Teams by using the ESI eTeams Connector.

Configuring Teams to Use ESI Voicemail

Why choose this method? The main reason to use ESI voicemail is that it offers more features and functionality than the Microsoft Phone voicemail platform, such as automatic emails sent to you with an attached wave file of the voicemail and voicemail transcription.

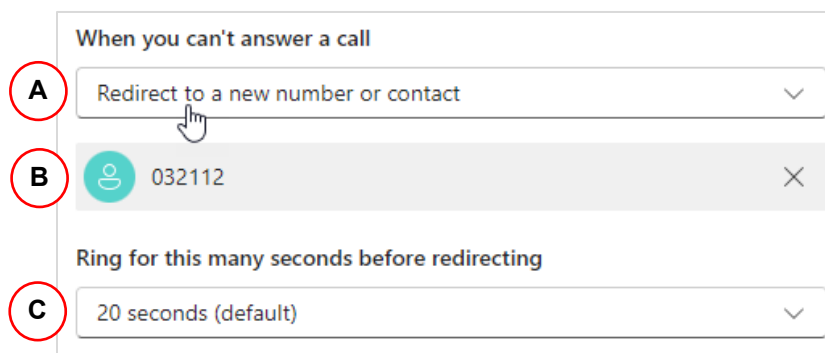
1. Log in to Teams using Microsoft credentials.
2. Access Settings by clicking the ellipses (3 dots) in the upper right corner.
3. Choose Calls from the list of options.



4. Under Call Handling...
 - A. When you can't answer a call: Choose 'Redirect to a new number or contact'
 - B. In the gray field that appears enter '03' followed by desired extension (i.e., 031000).
 - C. Ring for this many seconds before redirecting: If not already shown, choose a value that's 30 seconds or longer.

Notes: Selecting a value less than 25 seconds will cause the Teams Voicemail to answer the call.

An ESI eCloud user expecting voicemail messages to arrive in your email inbox will not receive emails, as Teams does not offer this capability.



Now that your setup for ESI voicemails, go to the next section to see how you access those voicemails.

Accessing ESI Voicemails

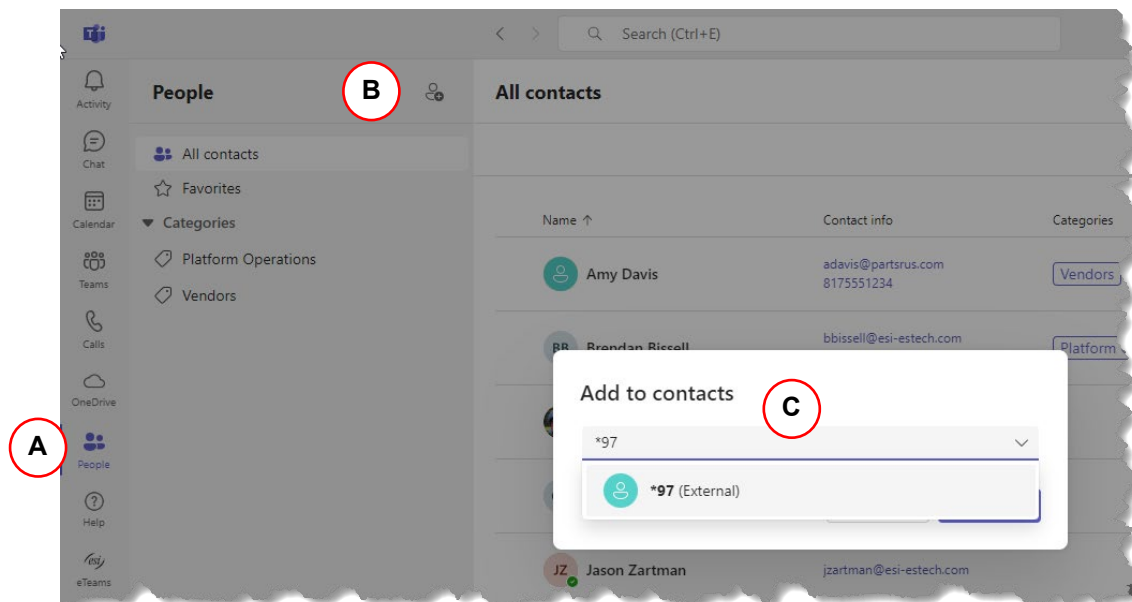
There are a few ways to access voicemails. You can use any method at any time.

- Access from within Teams
 - The ESI eTeams Connector (shown in the Command Ribbon) – provides visual voicemail, where you can see your list of voicemails and play them back. (for setup see [Using the ESI eTeams App to Access Voicemail](#))
OR
 - Dial into your voice mailbox from the Teams dial pad in the call window – provides only an audio playback of voicemails. (for setup see [Using the Teams Calls Panel to Access ESI Voicemail](#))
- Access from outside Teams
 - Login to the [ESI eConsole Dashboard](#) from your web browser (Chrome recommended).
OR
 - Dial into your voice mailbox from your ESI desktop phone or mobile app.

Using the Teams Calls Panel to Access ESI Voicemail

The Teams Calls panel can allow the user to call into the eCloud voicemail platform, and the easy way to trigger this access is to create a speed dial button on the Calls panel of the Teams app.

- A. Select “People” from the Command Ribbon in Teams
- B. Click “Add Contact”, which is the icon located in the upper left by the word “People”

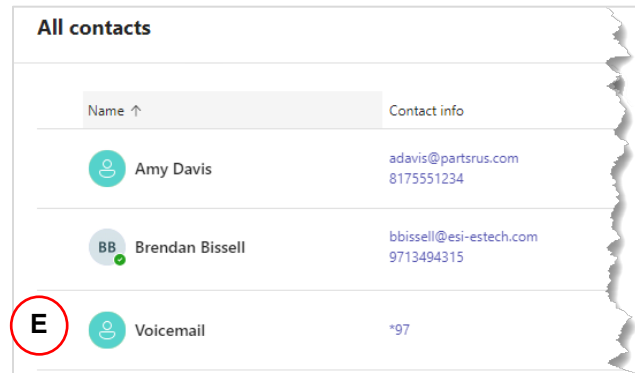


- C. Type ‘*97’ then enter.
- D. Click Add then fill in the Add Contact fields
 - First Name: Enter “Voicemail”
 - Last Name: leave blank
 - Email: leave blank
 - Company: leave blank

E. This new contact is now at the bottom of the list of users

- Select this contact and click the ellipses (3 dots) that appear.
- Choose “Add to speed dials”

Now go to Calls in the Command Ribbon and you’ll see the new Voicemail contact in the speed dial list.



Using the ESI eTeams App to Access Voicemail

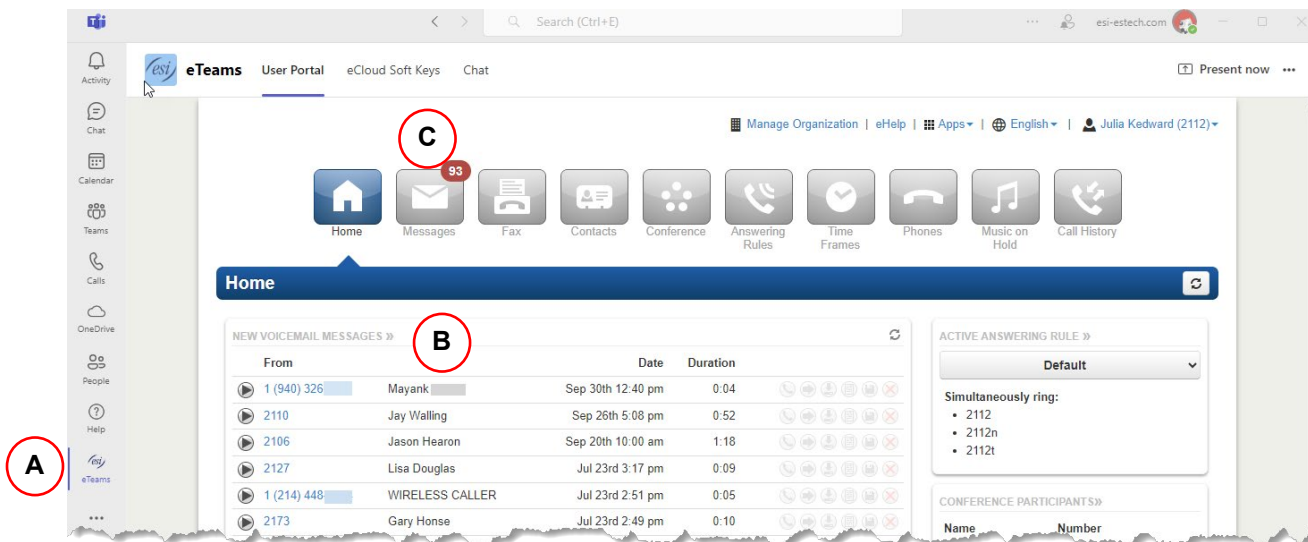
Another approach to access and manage voicemail is to use the eTeams app that gives you quick access to the ESI eCloud User Dashboard.

A. Click eTeams in the Command Ribbon

- If you don’t see this selection then you haven’t added it your ribbon. Simply click on the ellipses (3 dots) in the ribbon instead.






















B. Most recent messages are seen in the Home screen view

C. Messages tab: This shows all messages. The red badge on the Messages tab is the number of new messages you have.



(Continued on next page)

Regardless of the view you'll have the following options for a voicemail

NEW VOICEMAIL MESSAGES »					
From		Date	Duration		D
 1 (940) 326-7662	Mayank Sahib	Sep 30th 12:40 pm	0:04	     	
 2110	Jay Walling	Sep 26th 5:08 pm	0:52	     	
 2106	Jason Hearon	Sep 20th 10:00 am	1:18	     	

D. Your voice mail options are to the right of the voice mail and include the following:

- Call to Play: The phone icon will playback the voicemail from within eConsole.
- Forward Voicemail: The right arrow will forward the voicemail to another extension.
- Download Voicemail: The down arrow will download the voicemail to your computer, which is saved a regular WAVE file.
- Transcription: This will show the voice mail transcription in eConsole.
- Save: The disk icon will save the to your to your Saved list and will appear when selecting the
- Saved option from the voicemail dropdown box options.
- Delete: The delete icon will move the voice mail to Trash.

Clicking the Messages tab (see C above) will provide a very similar view with the following additions:

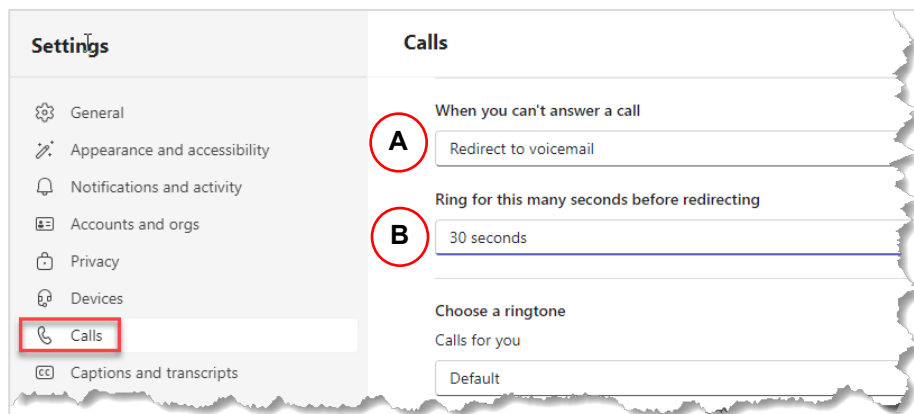
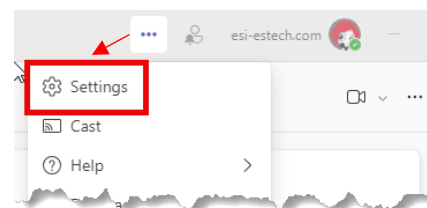
- Filter by new, saved, and trash
- Can view SMS messages (these are seen and managed from the eTeams SMS Connector)
- Voice mail settings – Please see page 18 of the [eConsole User's Guide](#) found in ESI's Resource Library.

Note: The chats that appear in eConsole are not the same chats that appear in Teams via the Chat icon in the Command Ribbon. You can use both chat methods to send an internal message to other system users however you will not see chats from both systems in the same place. ESI suggests picking your desired method and stick to it.

Configuring Teams to Use Teams Voicemail

With this method you'll receive, manage, and setup voicemail through Teams only. These voicemails will not appear in the ESI eCloud system or dashboard (eConsole).

1. Log in to Teams using Microsoft credentials.
2. Access Settings by clicking the ellipses (3 dots) in the upper right corner.
3. Choose Calls from the list of options.

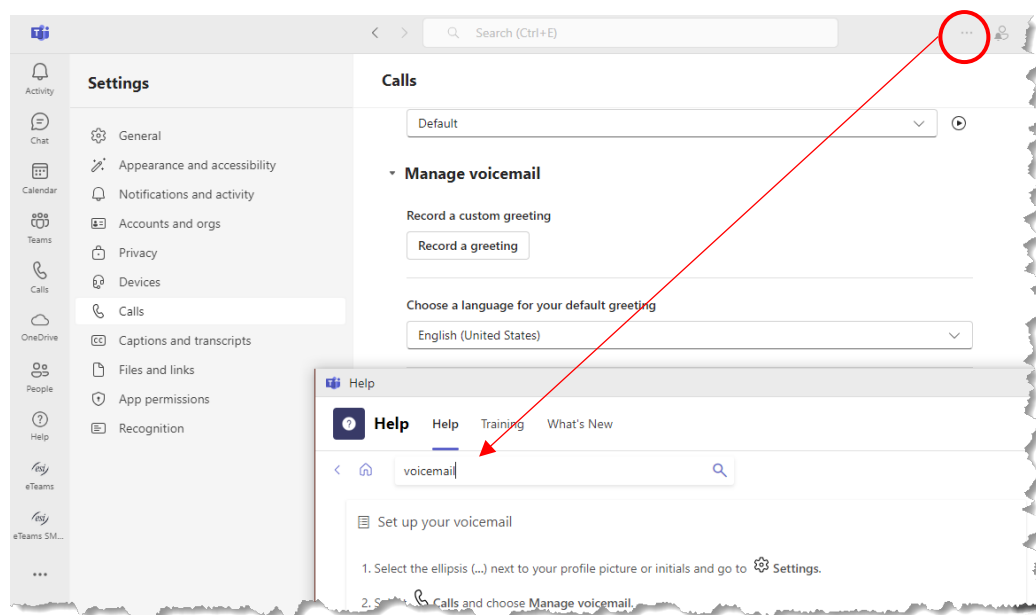


4. Under Call Handling...
 - A. When you can't answer a call: Choose 'Redirect to a voicemail'
 - B. Ring for this many seconds before redirecting: If not already shown, choose a value that's 30 seconds or longer.

Note: Selecting a value less than 25 seconds will cause the Teams Voicemail to answer the call.

Accessing Teams Voicemails

Please refer to regular Teams documentation regarding Teams voicemail settings. This can easily be done by clicking the ellipses (3 dots) in the upper right corner and choosing Help. When the Help window appears, type the setting name for which you need assistance.



Settings

You can access setting by clicking the ellipses icon (3 dots) in the upper right corner of Teams.



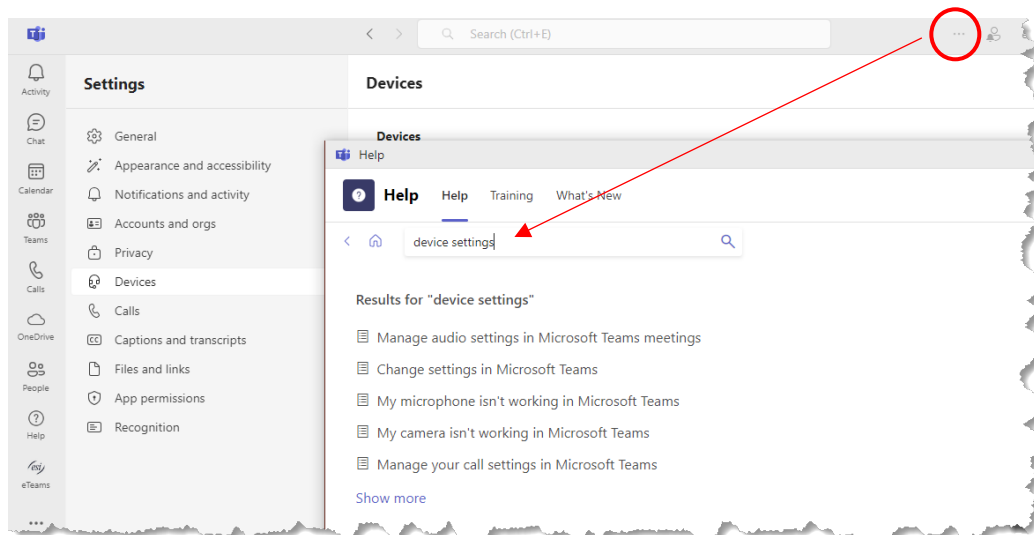
Ring Tones

1. Access Teams Settings and choose Calls
2. Scroll to the Ringtone section and choose the ring tone based on the action stated. Note that each tone is played when selected so you can hear what it sounds like.
 - Calls for you: This ringtone value plays when your extension or Teams number is the destination of an inbound call.
 - Forwarded Calls: This ringtone value plays when a Teams colleague forwards a call to this extension.
 - Delegated Calls: This ringtone value plays when a Teams colleague's delegates this extension to answer calls associated with their extension.

3. Once your choice is made it is automatically saved.

Other Settings

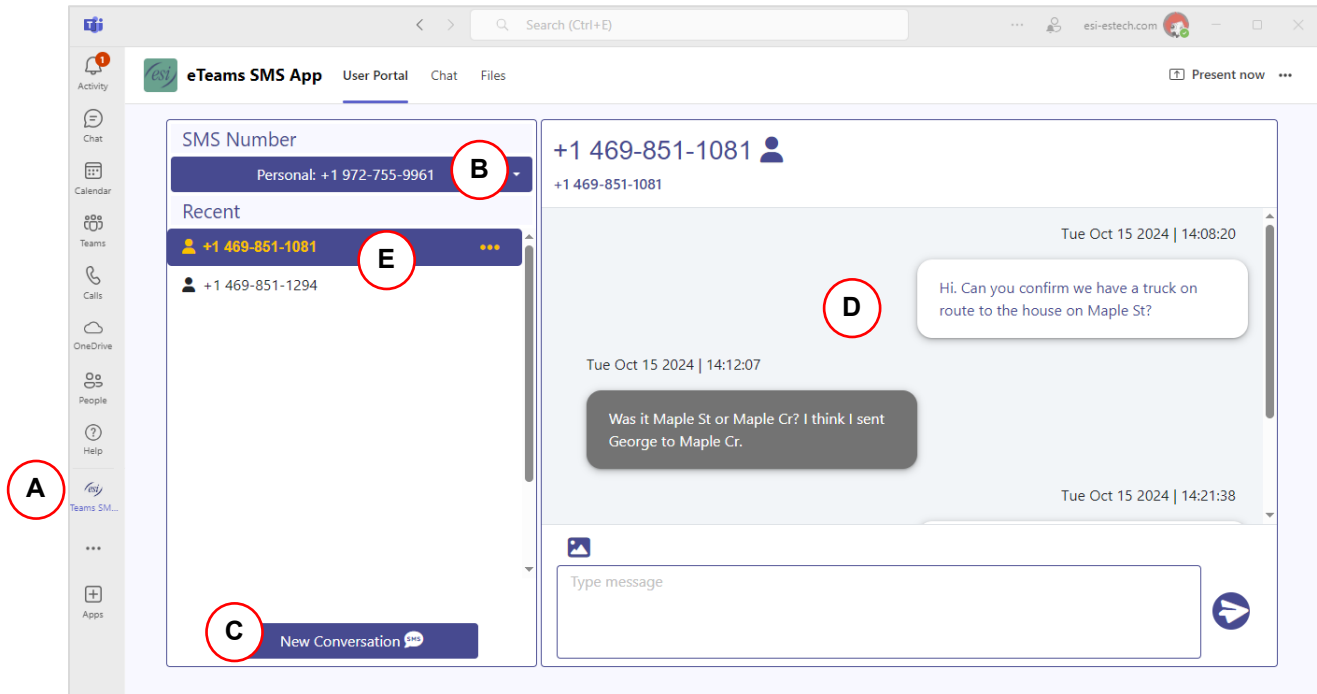
Please refer to regular Teams documentation for how to manage your other settings. This can easily be done by clicking the ellipses (3 dots) in the upper right corner and choosing Help. When the Help window appears, type the setting name for which you need assistance.



SMS Texting within Teams

Use the same process on page 1 to add the eTeams SMS connector to the Teams Command Ribbon - [Adding ESI Apps to the Teams Command Ribbon](#).

eTeams SMS Layout Overview

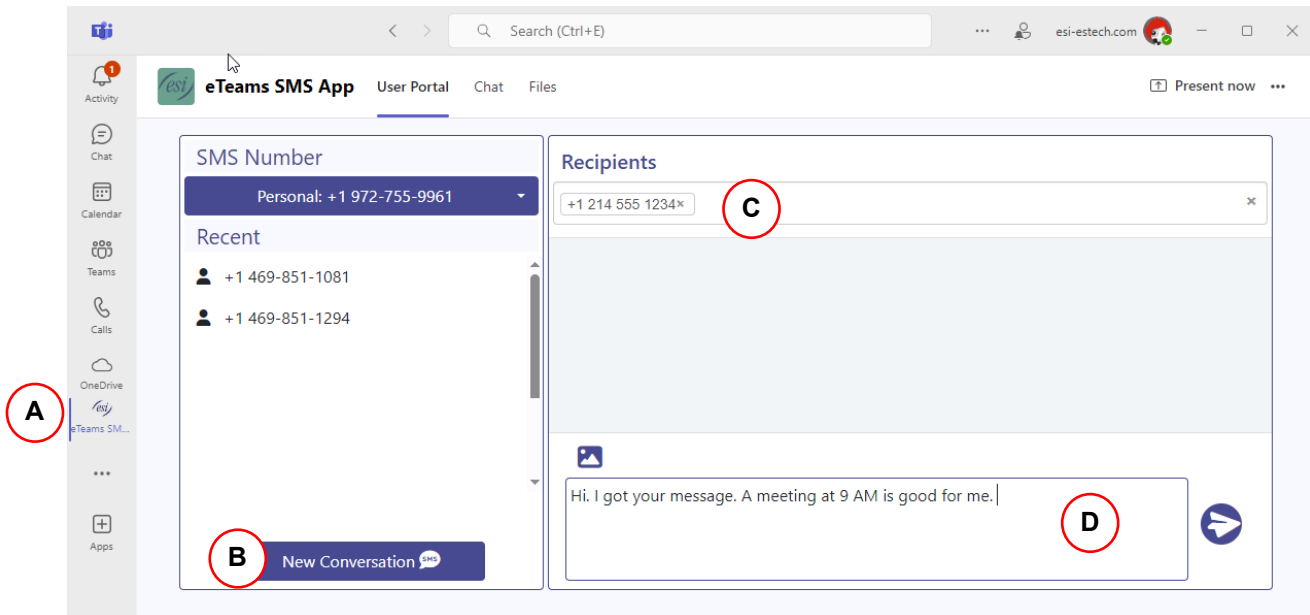


- A. eTeams SMS Connector: Location of the SMS connector in the Command Ribbon
- B. SMS Number: This is your SMS number. It's typically the same as your Business Phone Number (DID).
- C. New Conversation: Click here to start a new conversation.
- D. SMS Conversation: This area shows the conversation exchange
- E. Recent: This is the list of numbers you've recently texted.

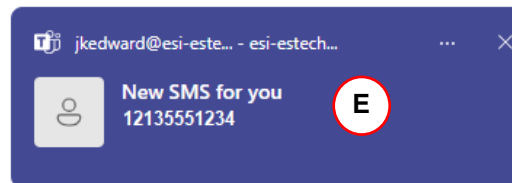
Using SMS

Start a text

- A. Click on the SMS eTeams Connector in the Command Ribbon
- B. Click New Conversation, which will open up the area to the right.
- C. Enter the desired number and Enter.
- D. Type the message and click the Send button.



- E. When the recipient replies you get an alert on your computer.



Reply to a text

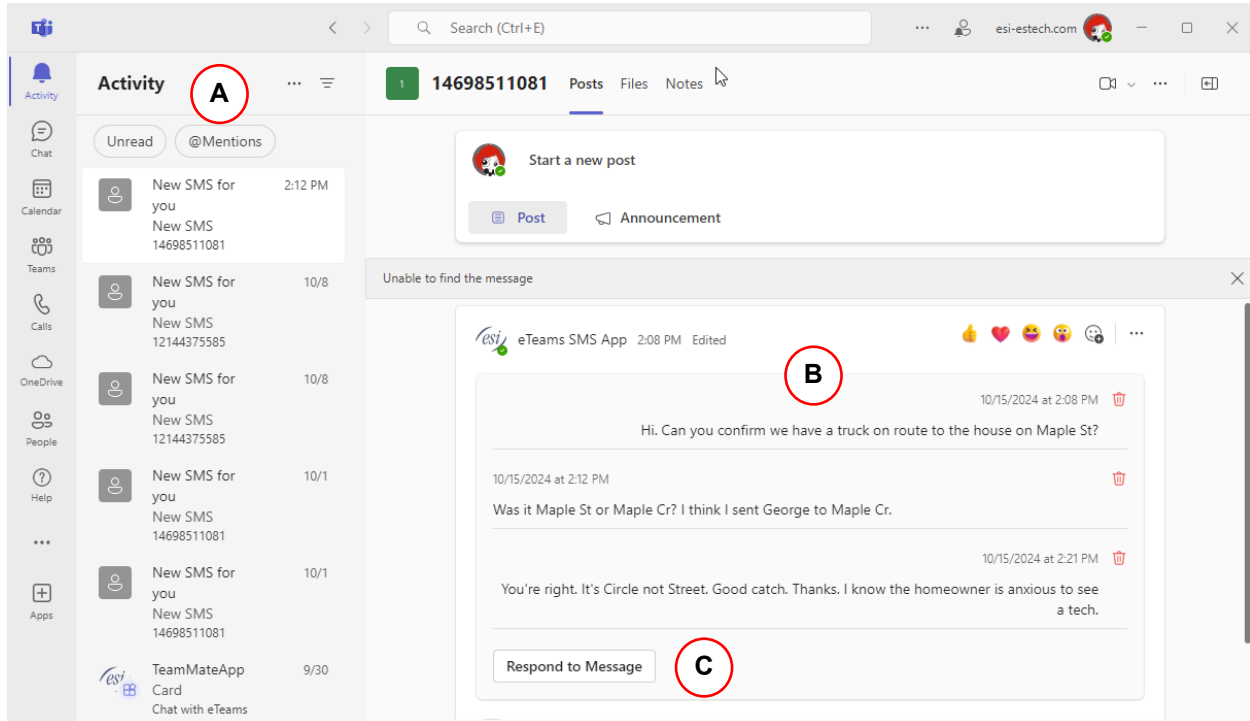
There are a few ways you can reply to a text in Teams

1. From the eTeams SMS screen, where you started the message.
2. By clicking on the notification (E) alert, which will take you to the Activity view in Teams.
3. Directly from the Activity view from the Command Ribbon. Activity is at the top of the ribbon.

SMS in Activity View

This picture shows how text conversations appear in this view.

- A. The most recent activity will appear first for both A and B. In this case it's a text we had with number ending in 1081.
- B. The details of the activity you chose in the list (A) will appear here.
- C. From here I can reply to the desired text conversation.



Group & International SMS Texting (not currently supported)

While it appears you can add more than one phone number for a single text, group texting is not supported at this time.

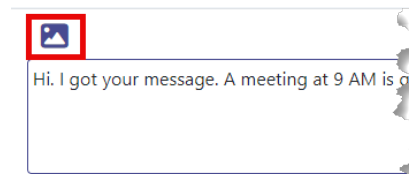
You can only send SMS to recipients with the same country code as that of your Enterprise's Home Country in the Microsoft Admin Center.

SMS Attachments and Emoticons

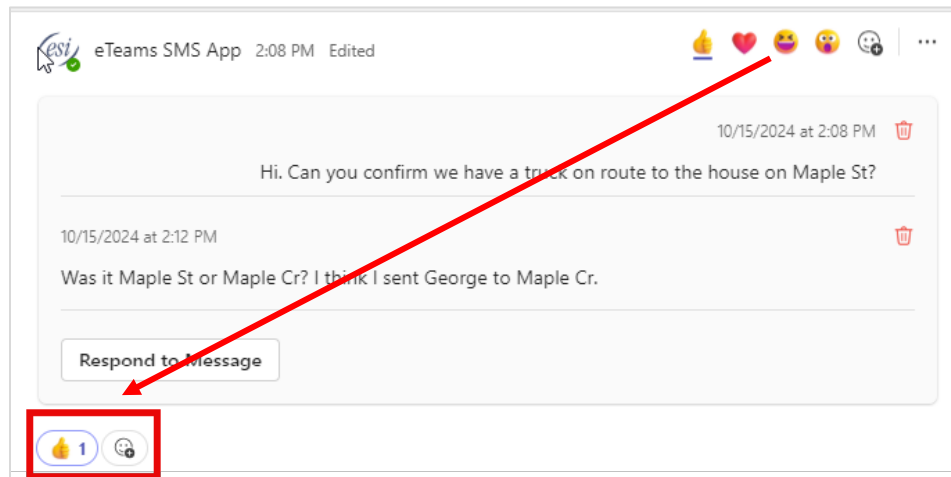
You can send and receive small files via text (MMS).

Important Notes about MMS:

- The maximum size for attachments is 3MB.
- It is recommended that only one attachment be sent at a time to avoid going over the carrier's size limit.
- eTeams will support whatever file types your carrier supports (Verizon, T-Mobile, etc). Refer to your carrier's documentation to confirm supported file types.
- File names may be changed by the carrier in transit. Do not be alarmed if the file name appears as a hash by the time it reaches the recipient.
- MMS attachments will be retained on the eTeams server for one month.



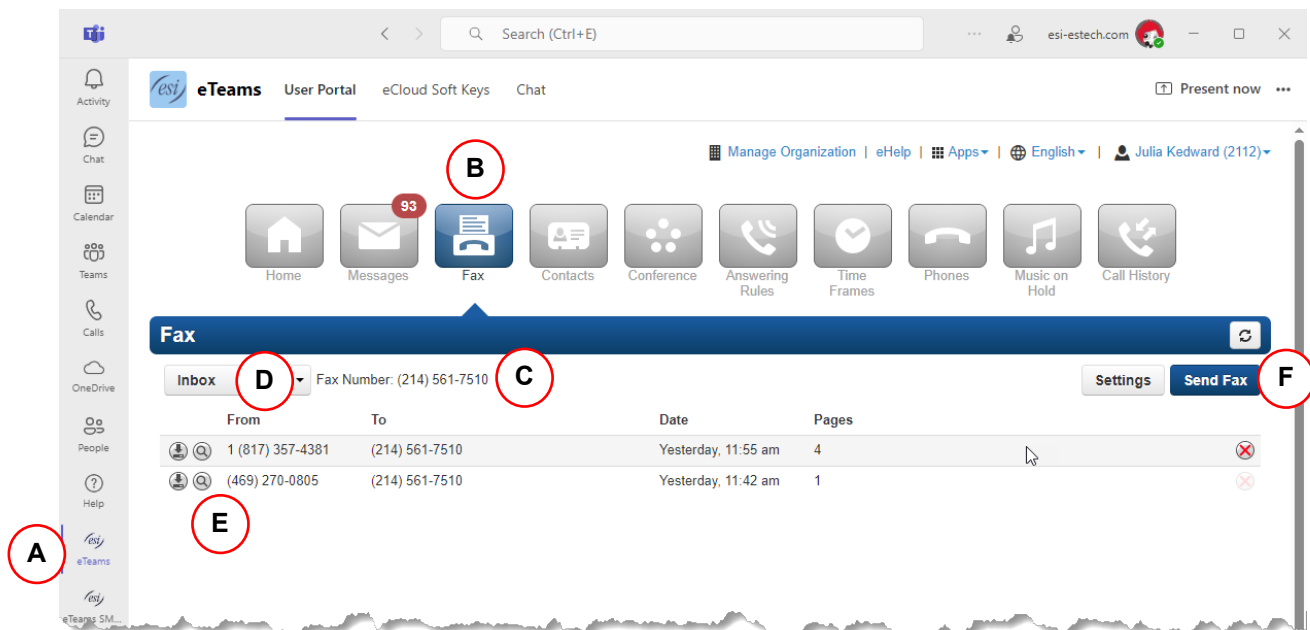
Emoticon selections are not available for texts. In the Activity tab you can mark an activity with an emoticon, as shown below, but the recipient will not see this. This is simply an emoticon reply within Teams.



Managing Your Faxes within Teams

You manage your faxes via Teams by using the eTeams Connector.

- Click on the eTeams Connector, which takes you to the ESI eCloud eConsole Dashboard.
- Select Fax, which presents a list of your received and sent faxes.
- The fax number shown is your fax number.
- By default a list of incoming faxes is shown but you can select to filter Sent faxes
- You can download, view or delete any fax.
- You can also send a fax from this view.



For details on eCloud Faxing refer to the [eFax for eCloud User's Guide](#).