ESI Cloud PBX

Quick-start Guide

0455-1154
Rev. A

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

About ESI

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

We Make It Easy To Communicate

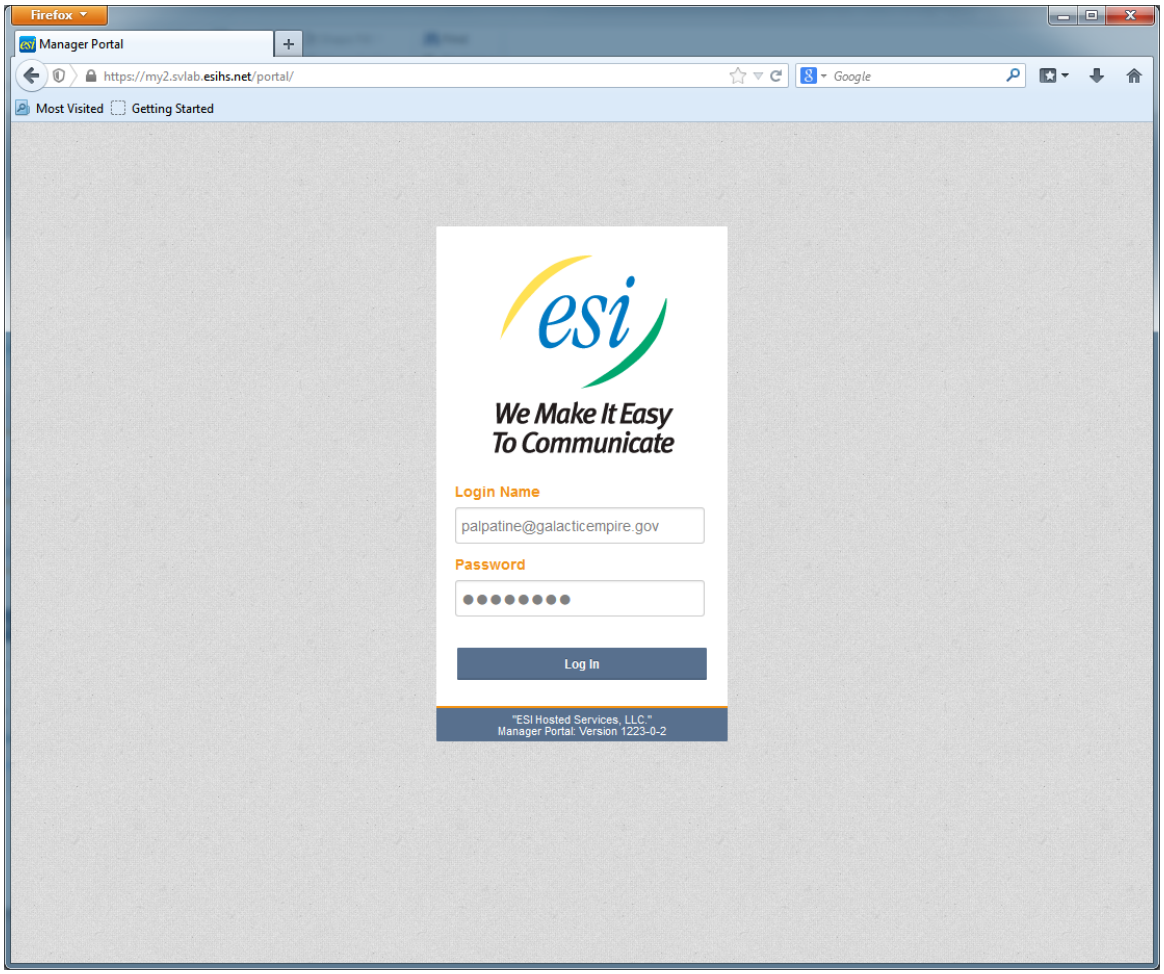
Contents

Getting started

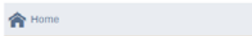
This *Quick-start Guide* is intended to offer you a quick walkthrough of the **ESI Cloud PBX** solution, from setup to programming, reporting, and overall maintenance. Troubleshooting will be added to a later revision.

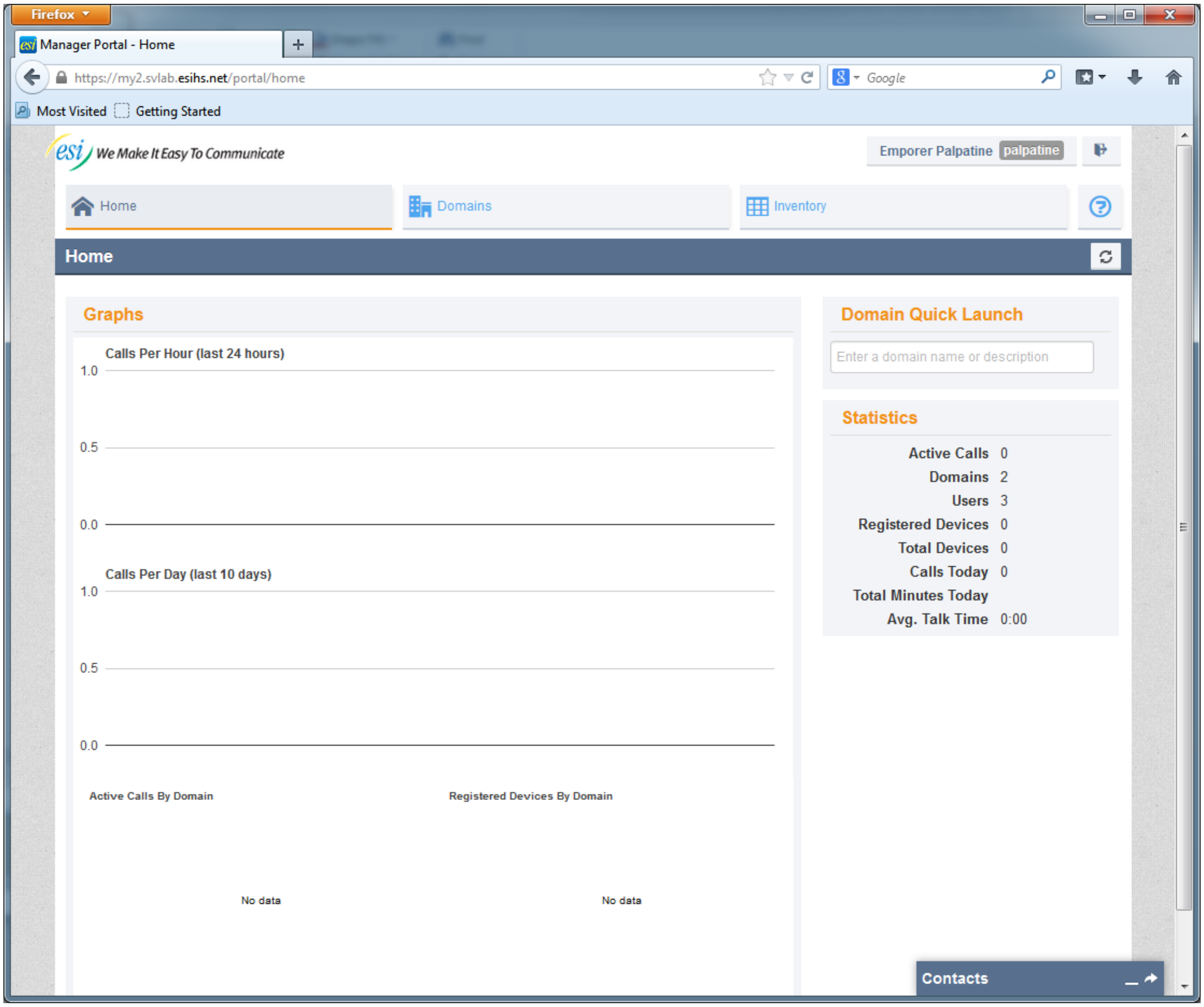
By now, you have received the phones which have been pre-provisioned for the ESI service. You have also received your Reseller login information that you'll need to use to log into your Reseller dashboard. Note that this guide can be used with either your demo domain account or with a customer domain.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

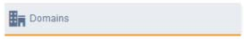
The first step is to log into your Reseller account via the Reseller dashboard. Enter the URL that was sent to you, along with your user name and password.

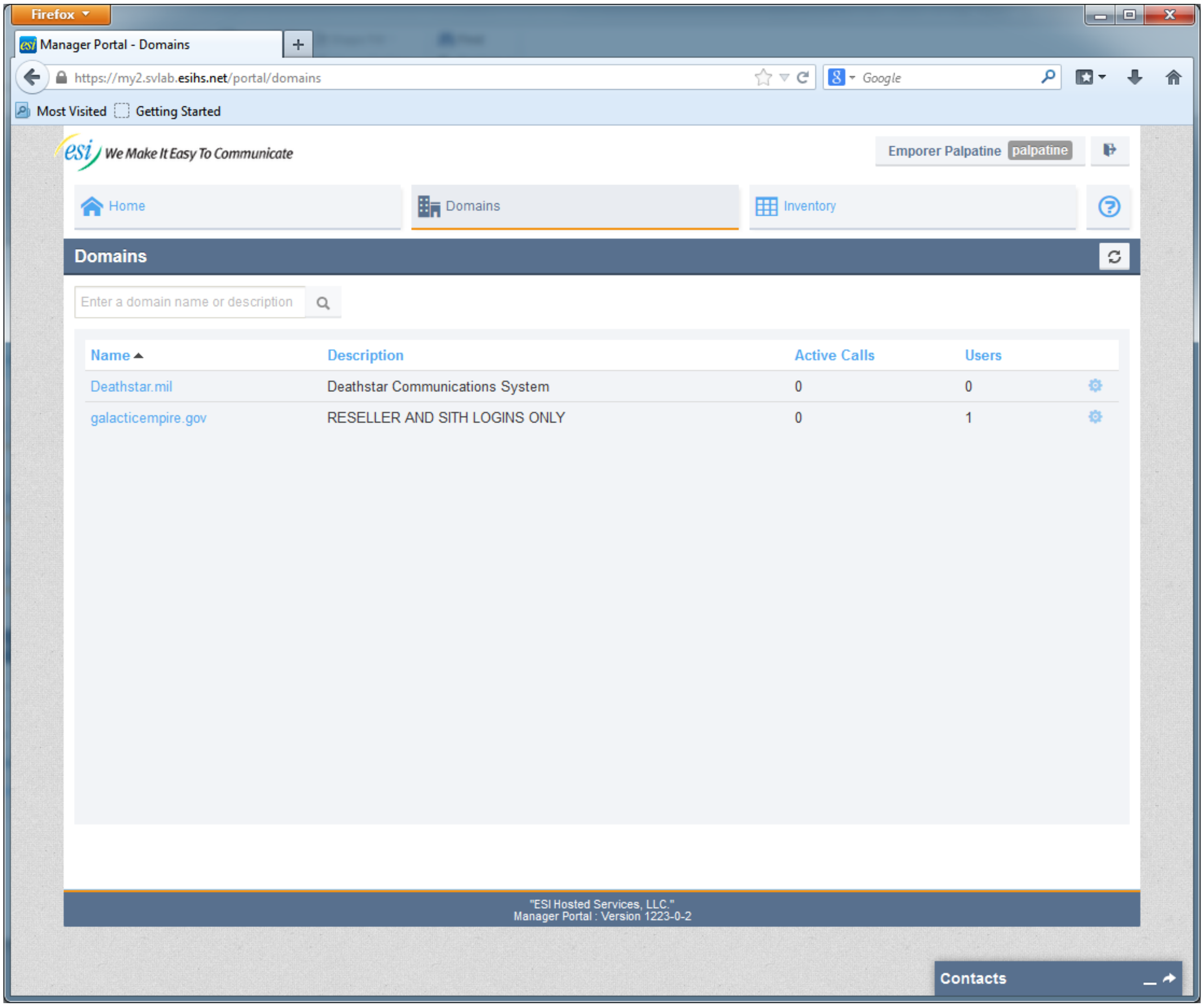


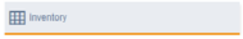
Once you get logged into your Reseller account, you'll see there are three key icons across the top of your dashboard screen.

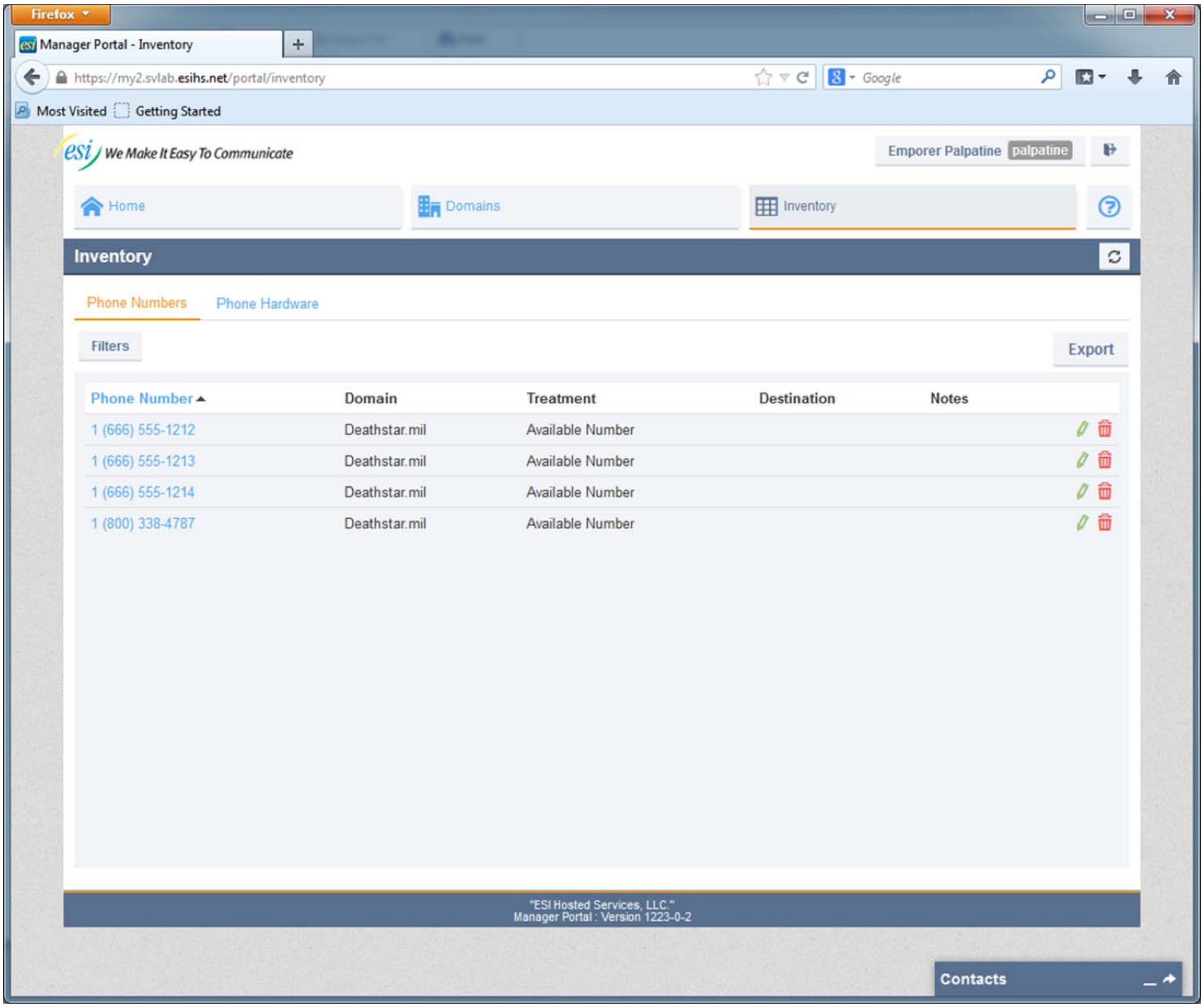
The **Home** icon  is where you will always start. It offers insights for call patterns across all the domains you manage as a Reseller, with additional statistics on the right-hand side.



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



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



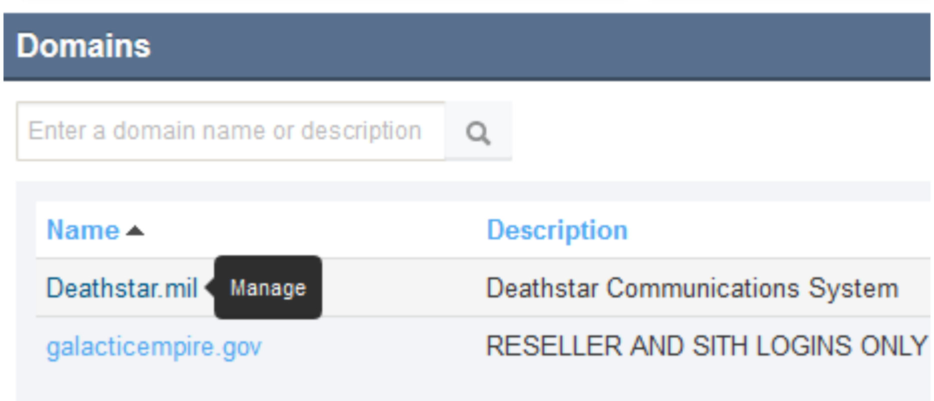
Return to the **Domains** screen to start setting up accounts.

Gathering info

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

Managing the domain

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

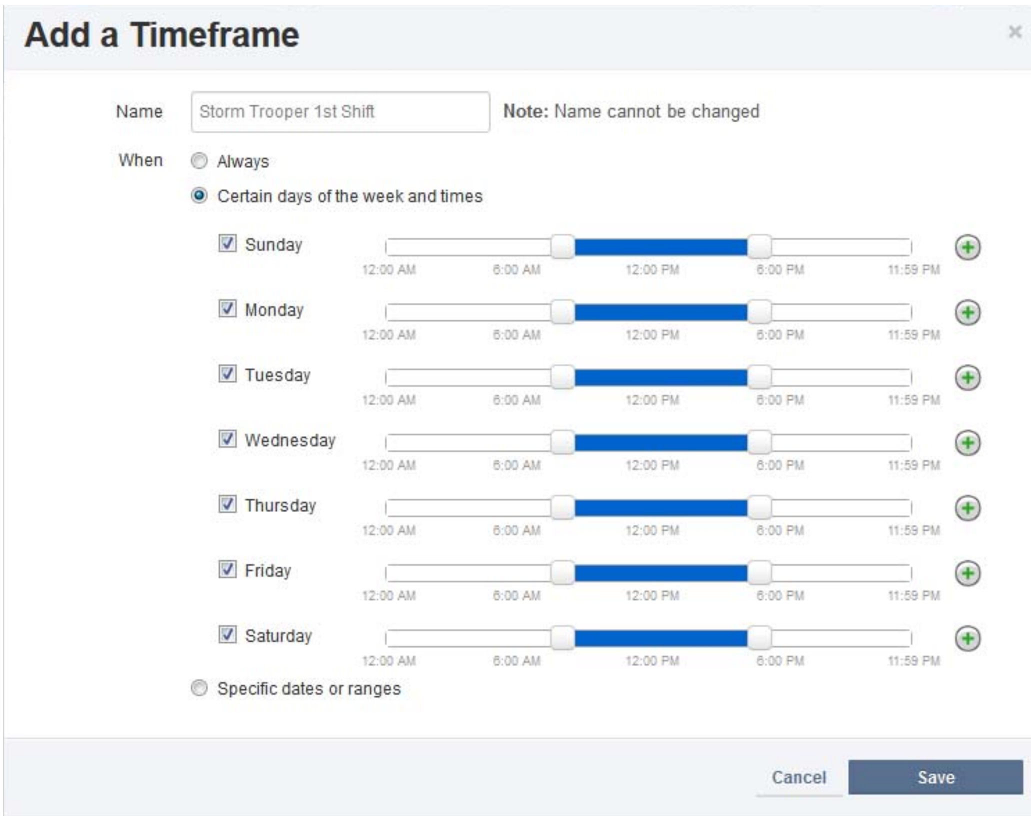


To set up users for a new company, click the domain name link to be taken to the configuration screen. Click **View all domains**, near the top of the screen, to return to the **Domains** screen.

Creating time frames

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

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



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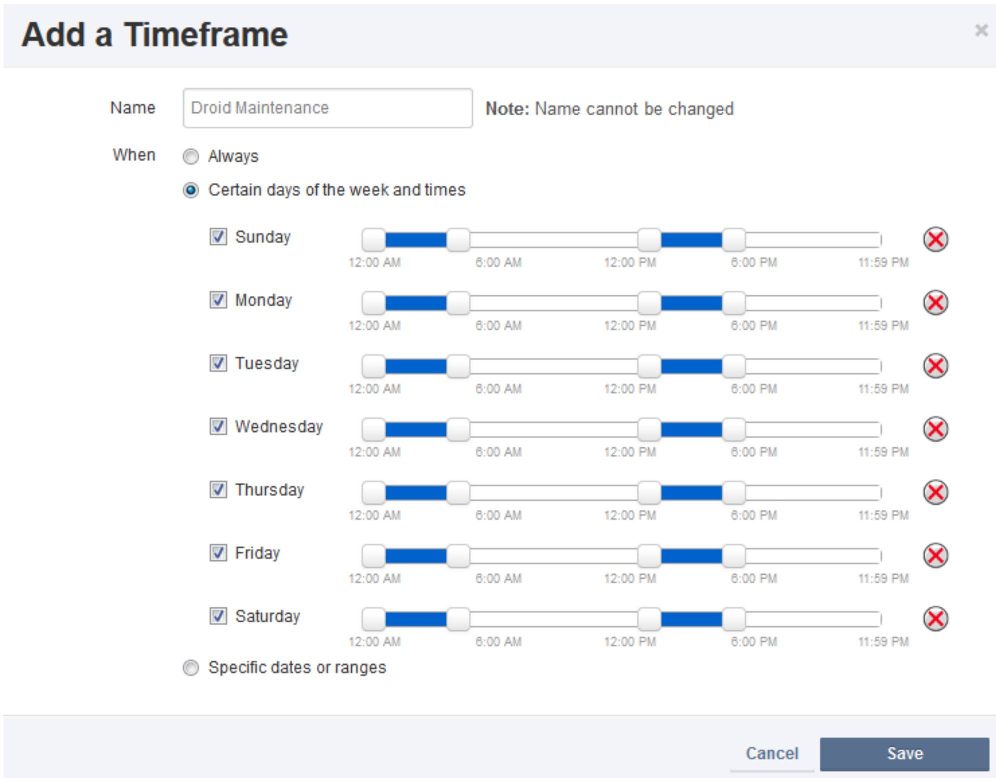
3. When the **Certain days of the week and times** radio button is selected, the **Add a Timeframe** dialog will expand, with a timeline slider for each day of the week. Select the customer's normal business days and then move the sliders on both ends to frame the business day. You can also click the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

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



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

5. When done, click **Save**.

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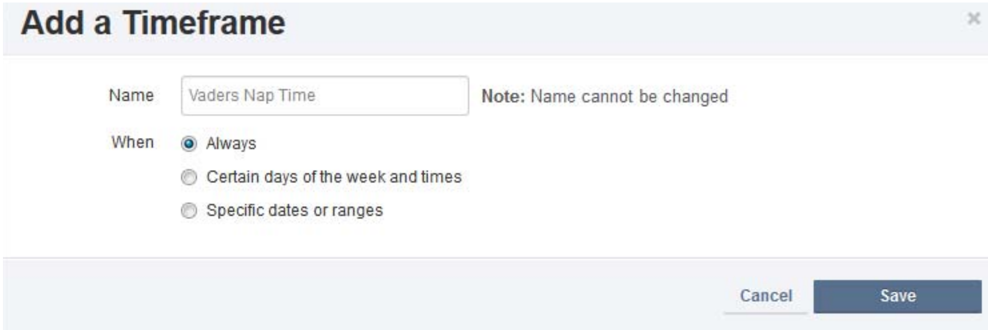
An **Always** time frame can be created so that any user can apply an answering rule to it. A common application of this would be a do-not-disturb type of rule. Here is an example **Always** time frame to which we'll later apply an answering rule:



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

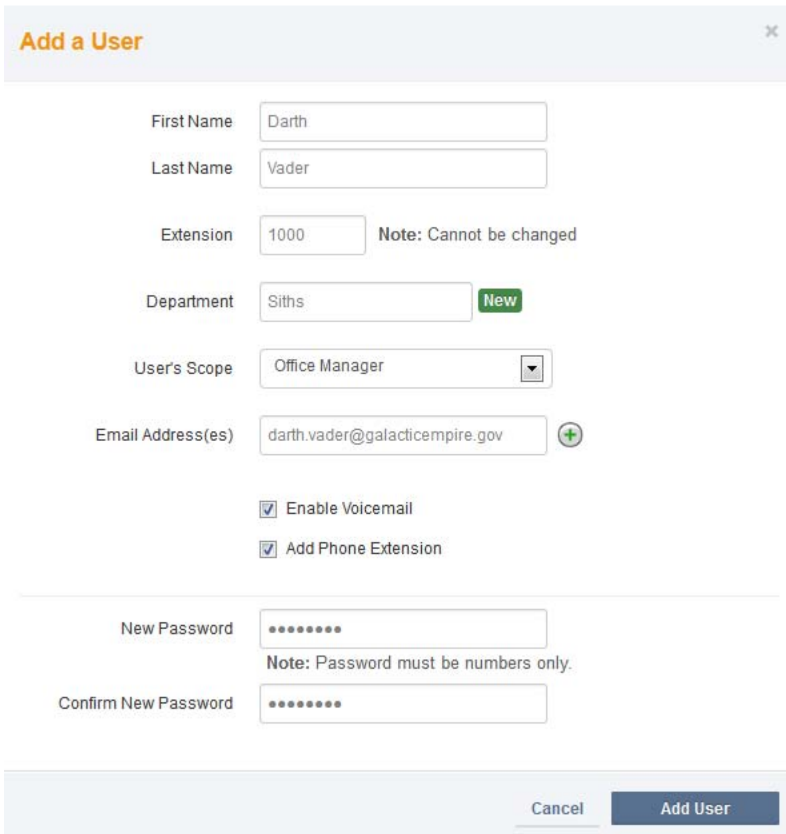
The rules can also be used by Premier users to create their own answering rules. These Administrator-created time frame rules will be displayed to users as **shared** rules; users can't change these rules. However, Premier users can also create their own custom time frame rules if the shared ones don't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

Creating user accounts

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

Creating the initial user profile

1. Click **Users** at the top of the screen when you are editing a domain.
2. Click **Add User.**
   A dialog box will pop up, requesting some basic information. Here's an example of the kind of information you might enter:



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

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

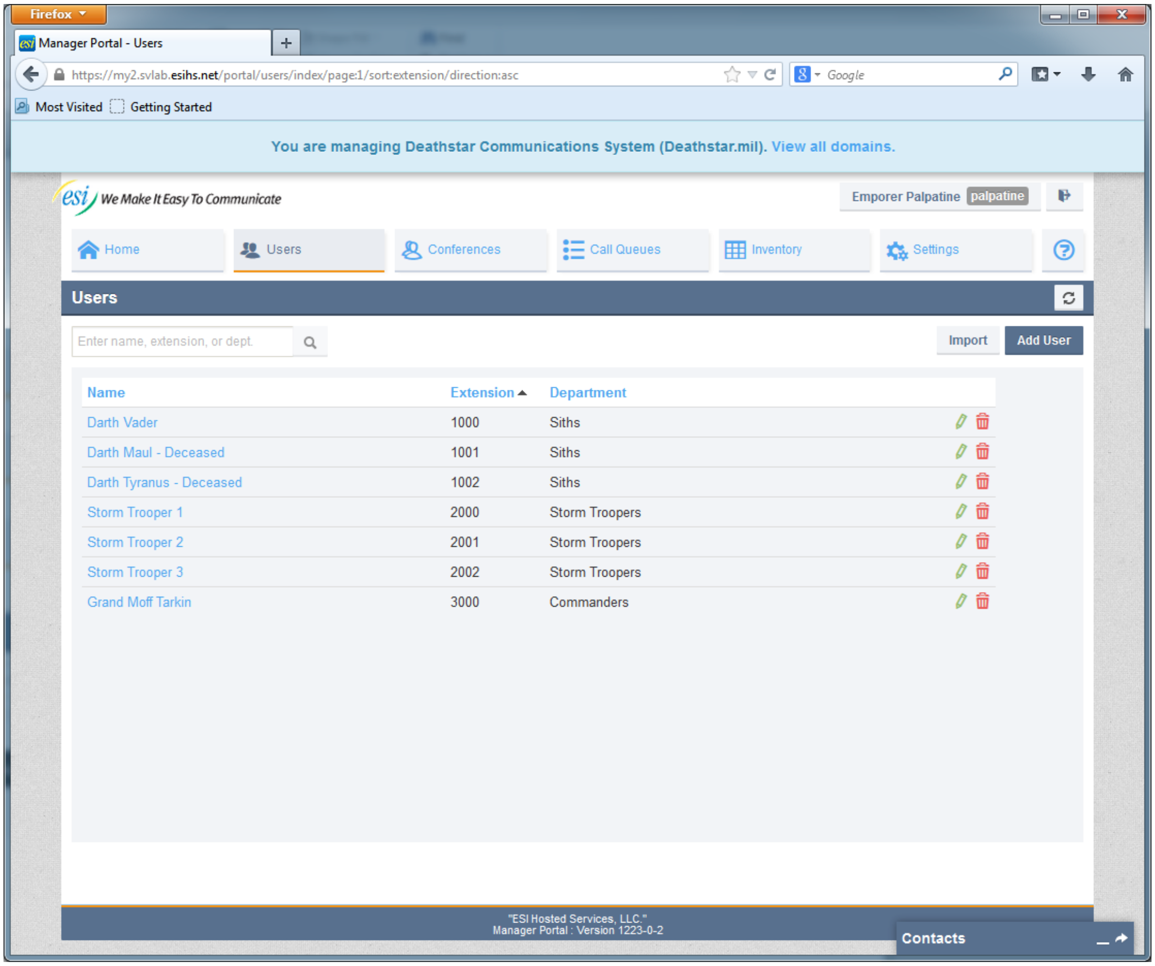
The **e-mail address** is required. It's used for unified messaging options, such as delivery of voice mail messages to the user's e-mail address.

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

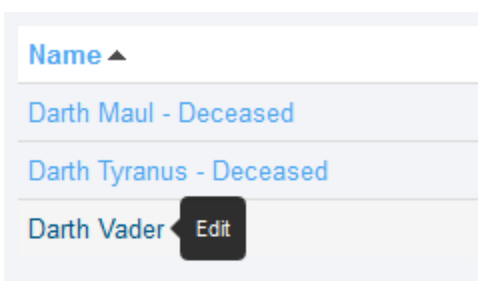
The **password** must be numbers only, and at least four digits in length. This is because the same password is used when a user calls his/her voice mailbox. The best practice is to make this at least eight digits long. Making it the user's extension number is just begging for trouble; these accounts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

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

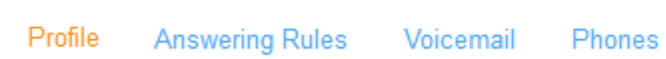
At this point, you can go through and create the initial set of user account as in the following screen:



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



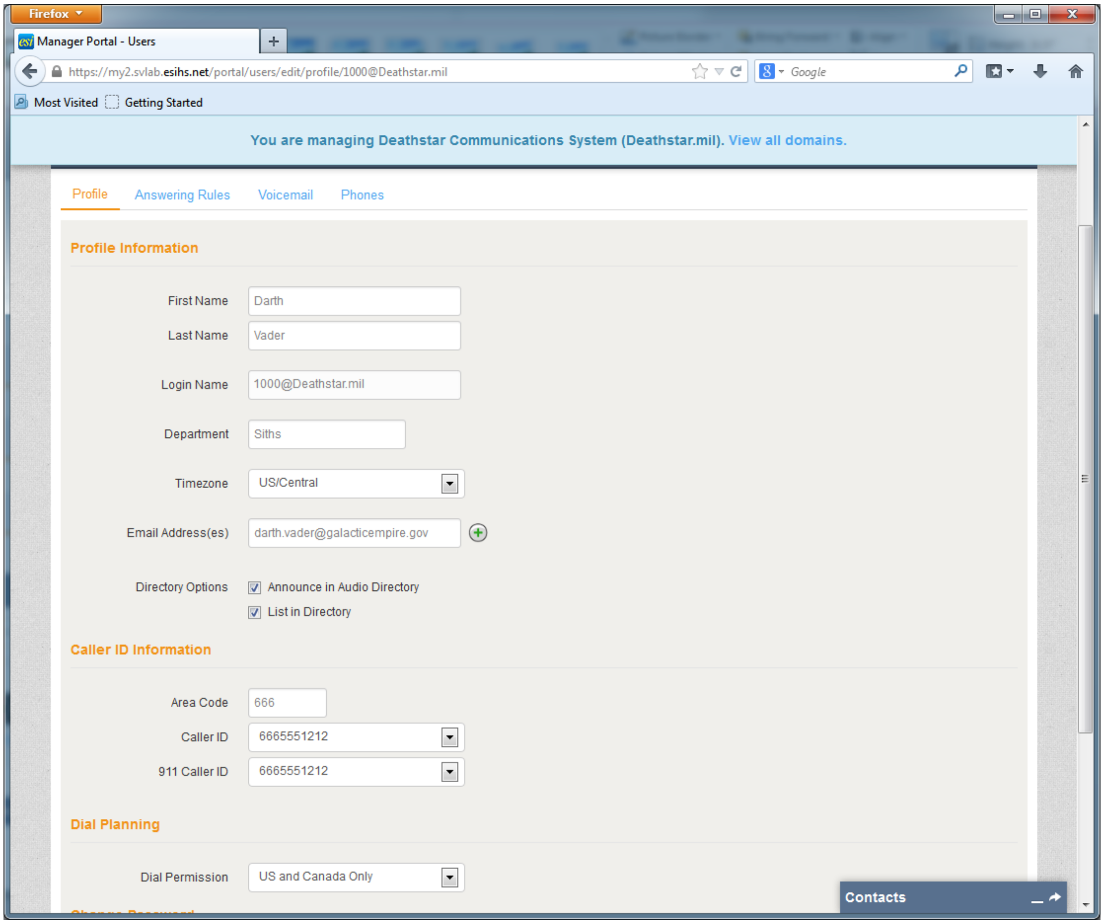
There are four tabs: **Profile**, **Answering Rules**, **Voicemail**, and **Phones**.



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

Step 1: Setting the user's profile information

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



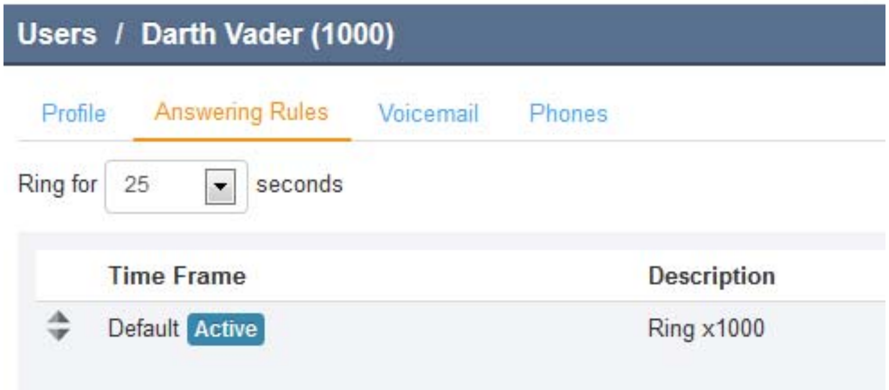
Some user profile options

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

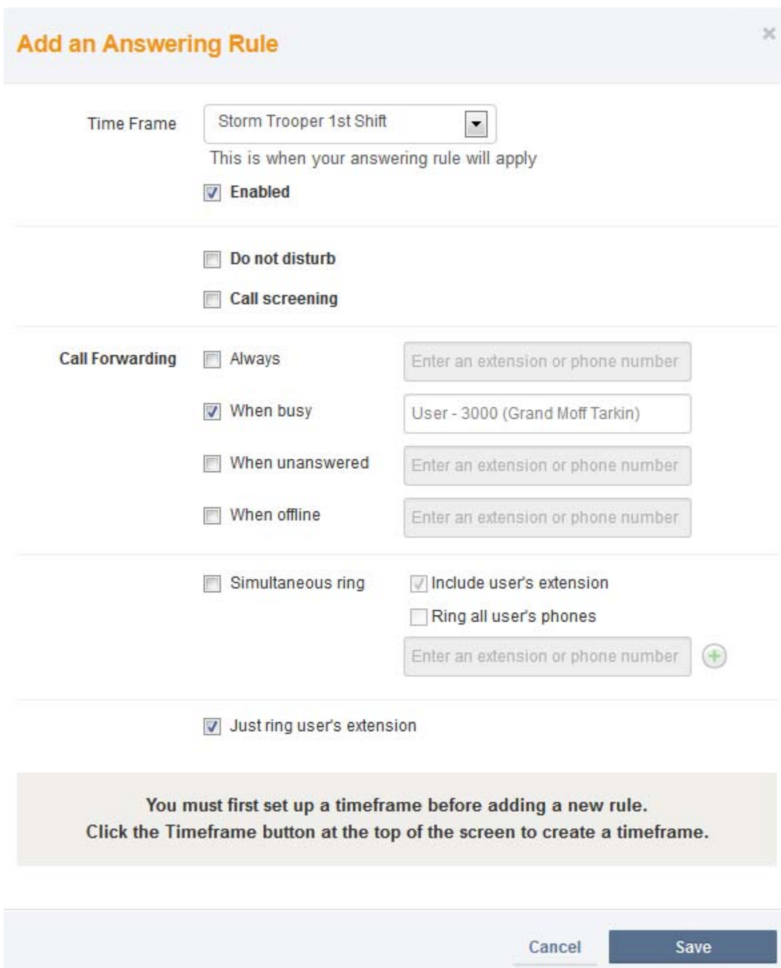
Make no changes to the **Password** section; this was already set from the initial creation. However, this is where a Reseller or Office Administrator can change a current user's password — such as for the Shared seat, which has no portal account.

Step 2: Setting answering rules

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



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



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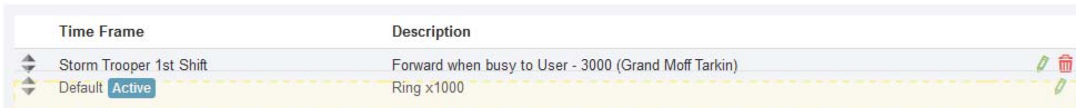
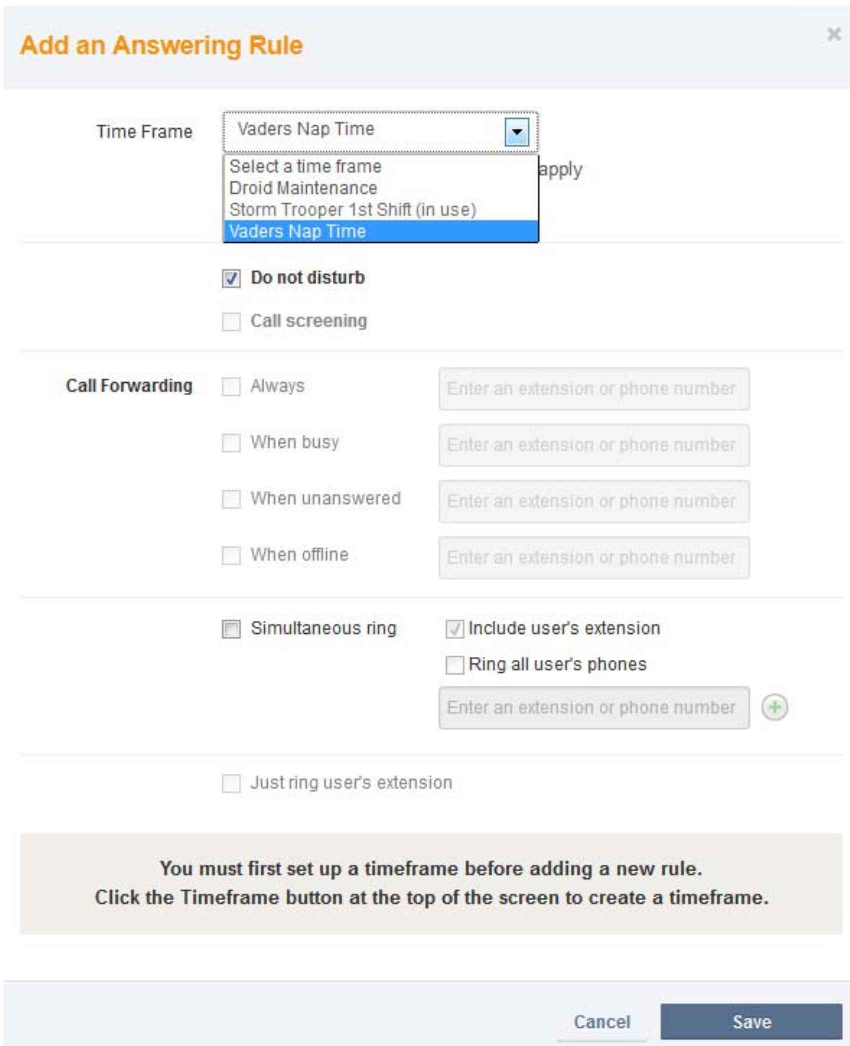
Use the drop-down list to select the time frame to which you want to apply a special rule. For most users, the base default rule will be all that is ever set; but, for an executive, you may want to change the **When busy** rule to send the call to his/her assistant. A Premier user may have multiple devices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

Click **Save** to save your new rule.

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



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



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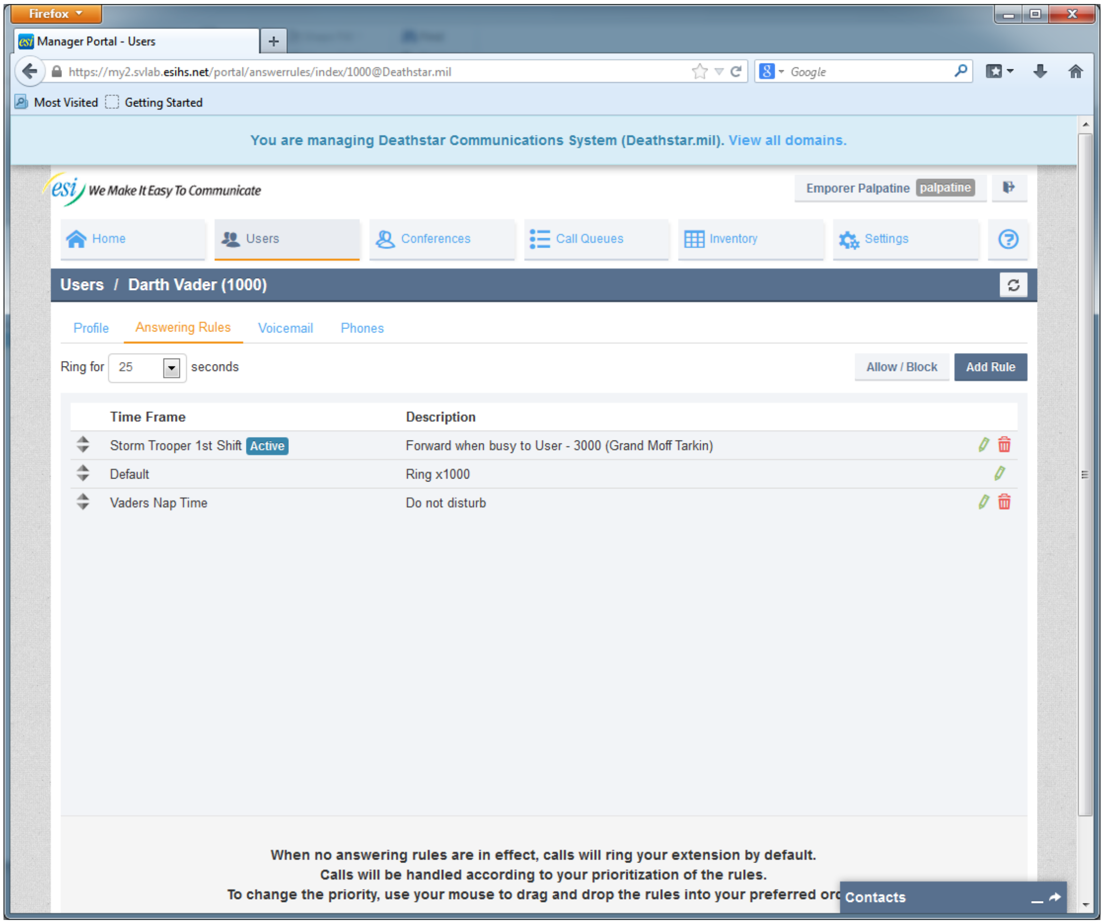
The user account should now have three rules: a business hours rule (active when within the business hours time frame), a default rule, and a do-not-disturb answering rule:



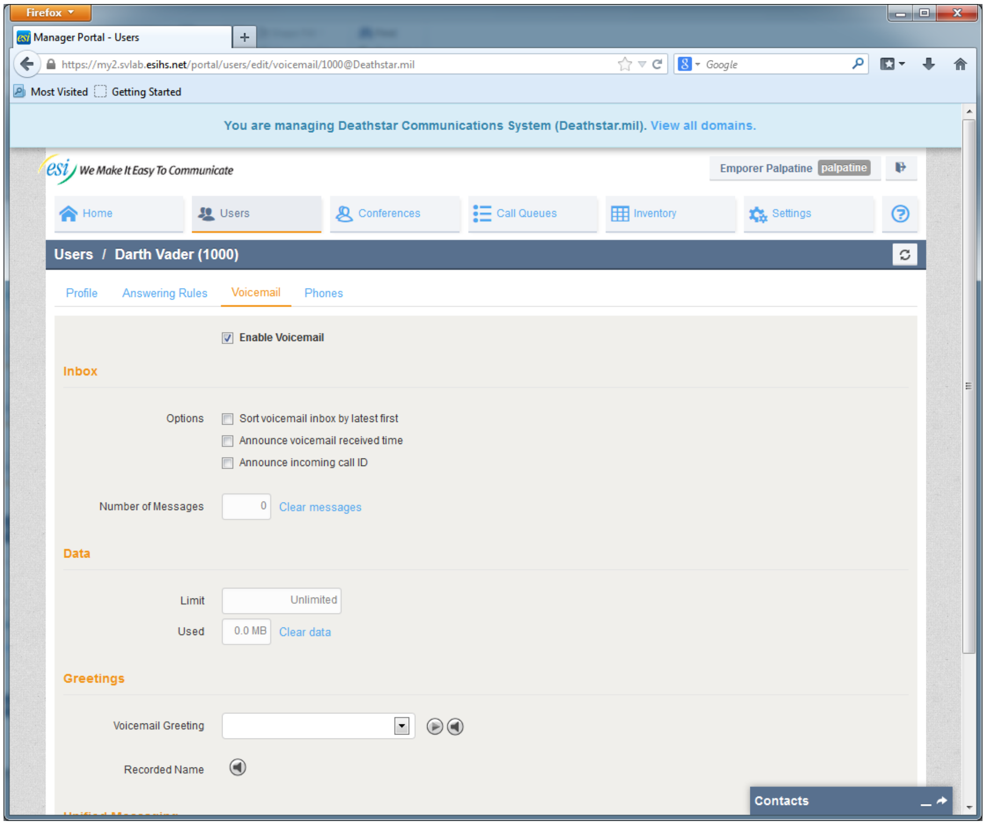
If this user should have a different rule applied for after hours, then create an answering rule for the after-hours time frame, select the desired options, slide that rule after the business hours rule, and click **Save**.

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

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

Step 3: Setting voice mail options

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



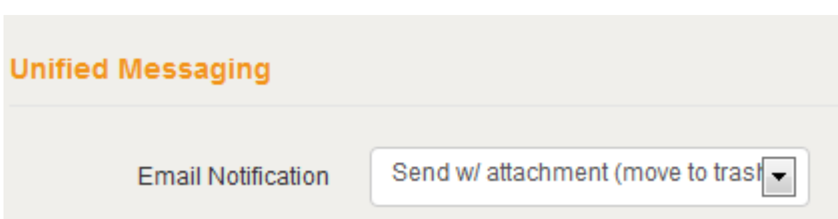
For the **Inbox** options, you can enable those options here if the customer has already indicated he/she wants any of these options; but, usually, it's just best to leave this up to the end user, who can log in with his/her own dashboard account and configure these options as desired.

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

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

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

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

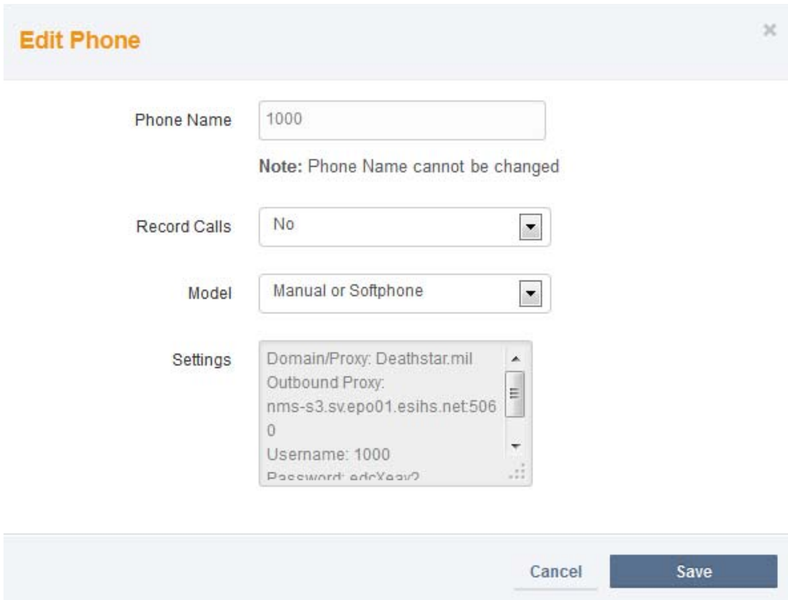


Step 4: Setting phone options

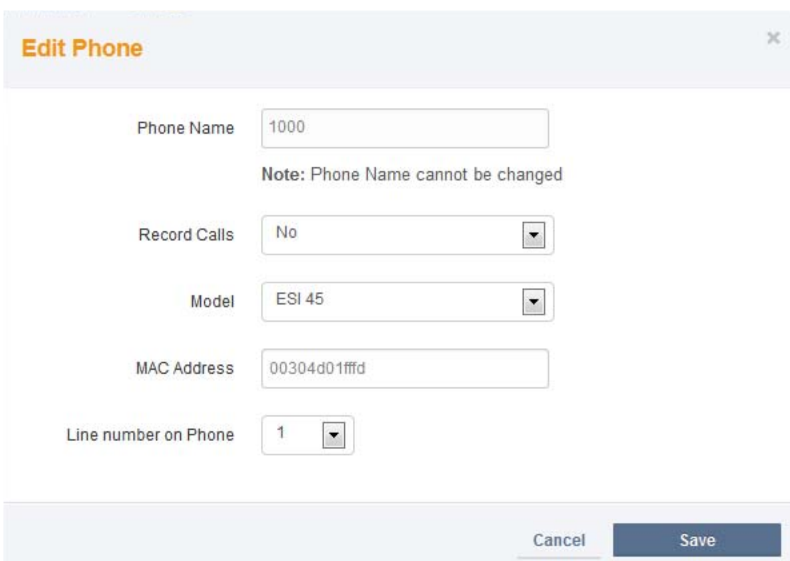
A default phone device is created when the user account is created with a default **Manual or Softphone** model type.

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

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



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



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

Registered	Device Name	Device Type	IP Address	MAC Address	Line
X	1000	ESI 45		00:30:4D:01:FF:FD	1

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

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

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

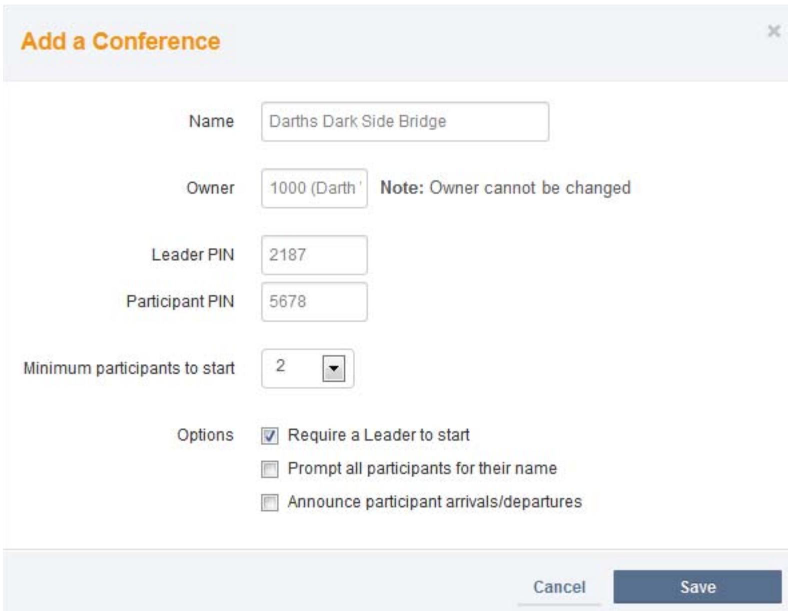
Continue to provision and set up the phones for any additional users, following the steps outlined in this section. Once this process is completed, all the accounts should be able to call into voice mail as well as call each other.

Configuring conferences

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

Premier conference bridges

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



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

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

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

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

Click **Save** to create the bridge.

At this point, create any personal conference bridges.

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

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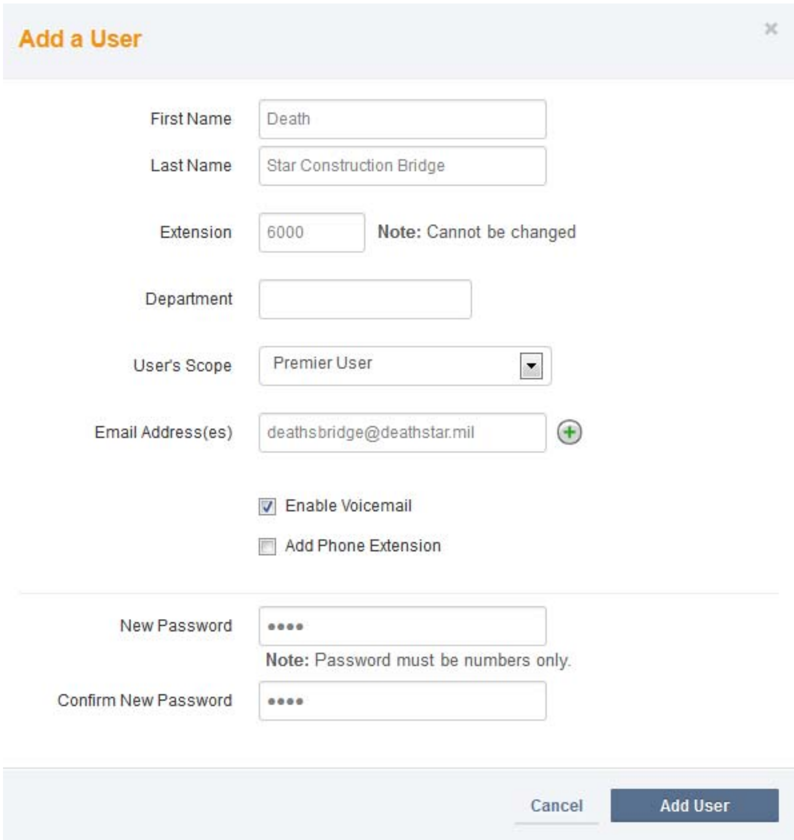
To set up a corporate/shared conference bridge, first create a user account. This user account will be used only with this bridge, not as a general user seat; this allows someone to log into the dashboard and manage the bridge. Just create a Premier user account (see “Creating user accounts,” page 9).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



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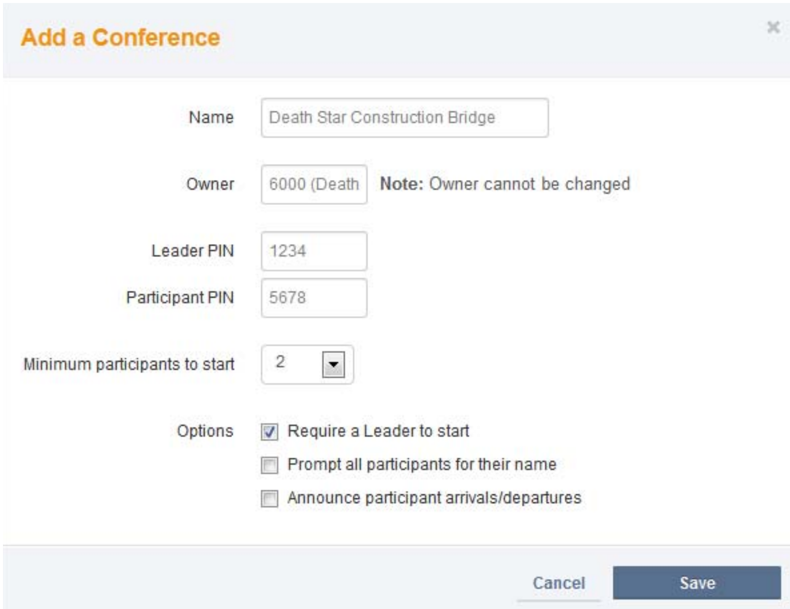
Next, click **Conferences** and select **Add Conference**. Create the new bridge, as in the following example:



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

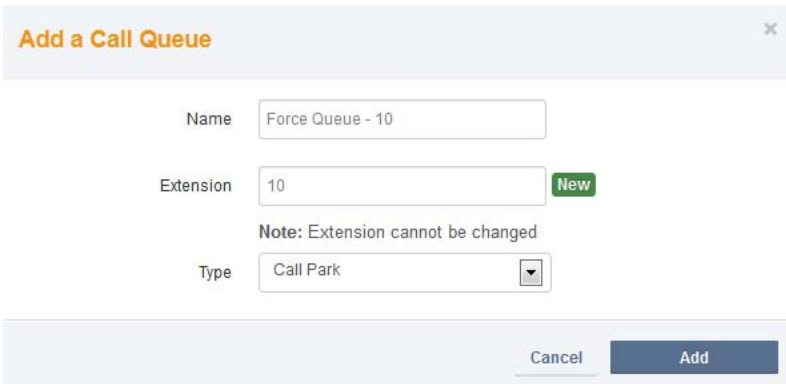
To call into a bridge, you can dial **0026000** (in this example) to reach the bridge directly. The same is true for the Premier conference bridges since, if you call the Premier user's extension, you will just reach that user's extension. The **002** prepended to the number allows you to reach the user's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

Configuring call queues

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

Call-park queues

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



Click **Add** to create the queue.

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

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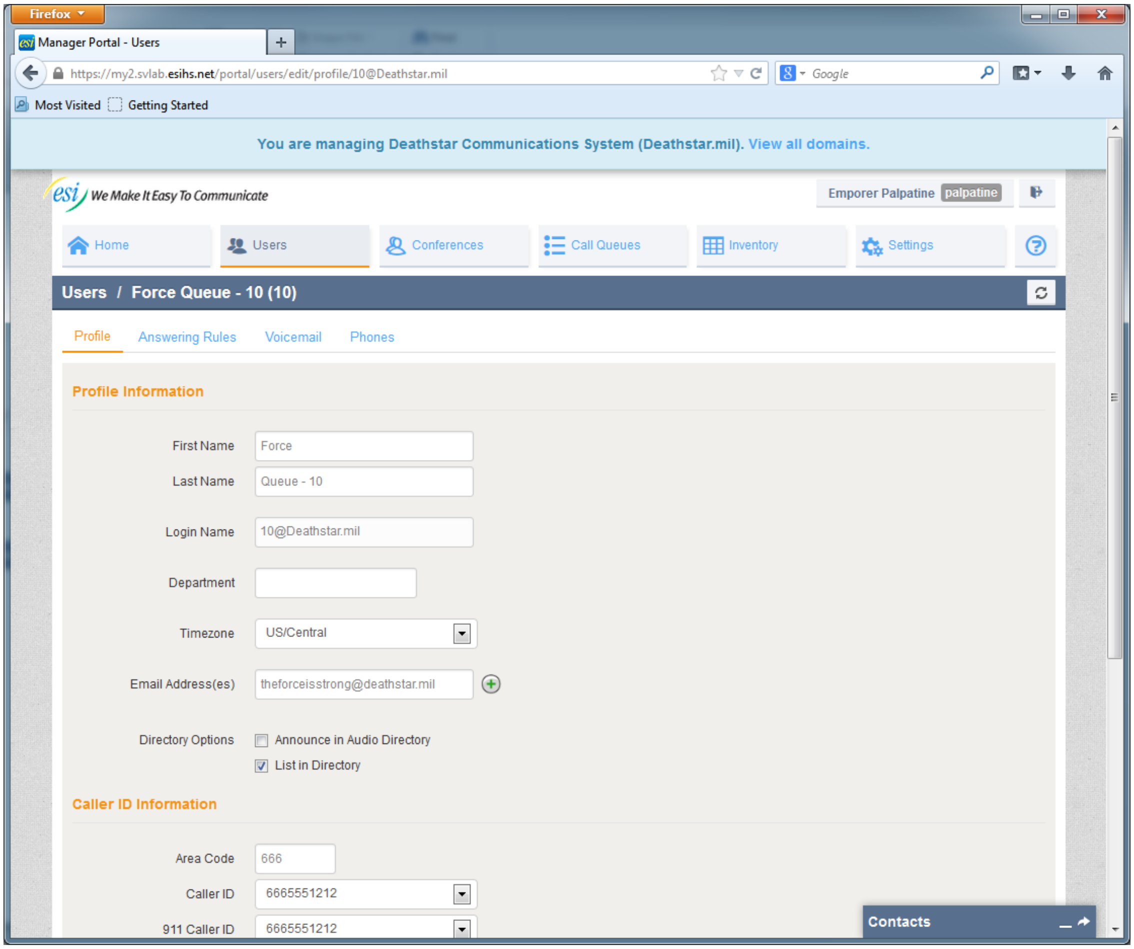
When you're creating queues, the extensions don't exist yet, so the display will indicate **New** next to the extension. Go to **Users**, and you will see that the call-park queue name is now shown as a user account with the chosen extension. Click this to edit the user account.



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

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

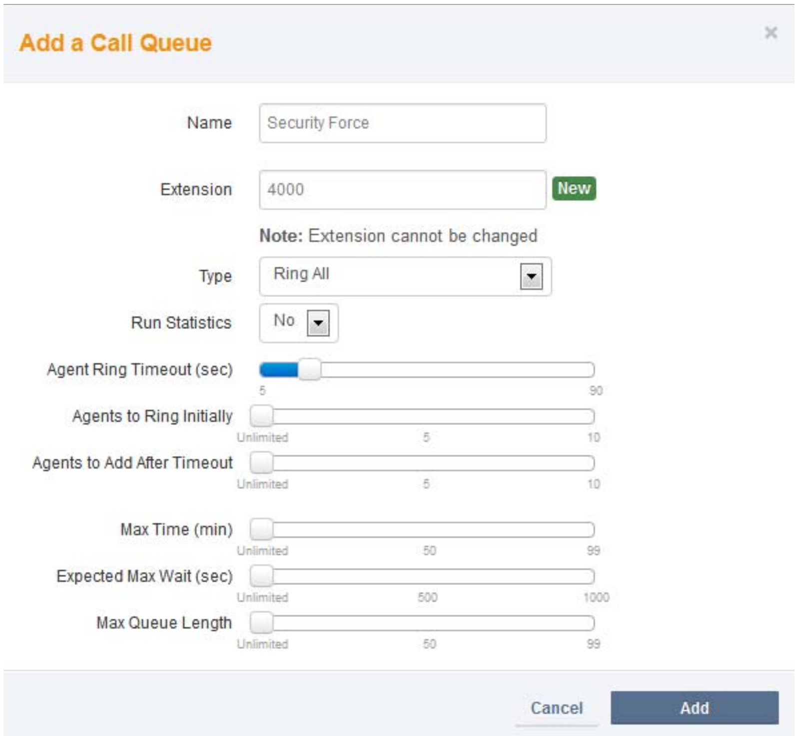
The **Ring for** *[x]* **seconds** setting on a call-park queue will control how long someone remains in the queue before the original user who parked the call is called back as a gentle reminder. Once this timeout is exceeded, the original user is called and presented an option to retrieve the call.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

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

Ring-all queues

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

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



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

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

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

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

Click **Add**.

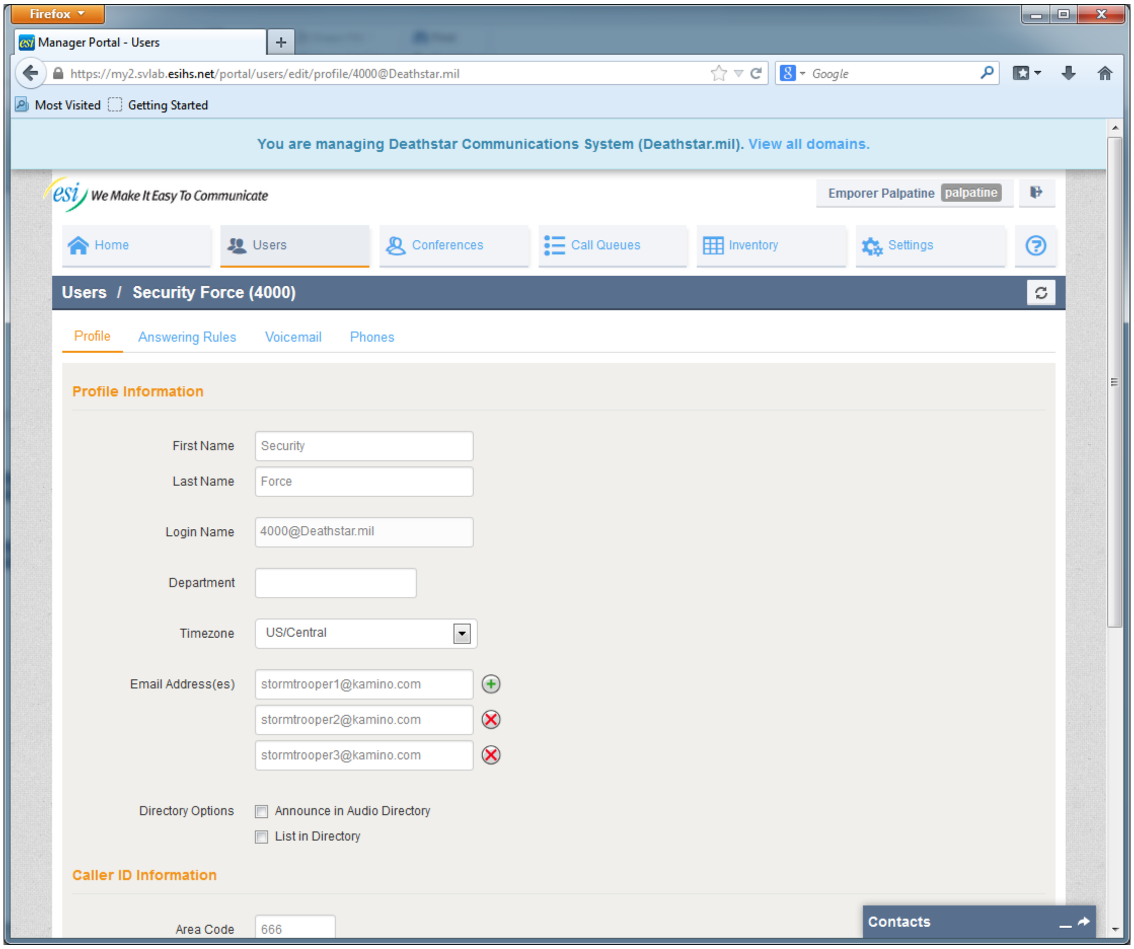
Because a user account is created, there is actually another timer that is running on the queue account. To change this, go to **Users** and select the user that has this queue name. Click the **Answering Rules** tab and then decide on a **Rings for** value. The default is the same as for regular user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

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

(Continued)

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

Click **Save** at the bottom.



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

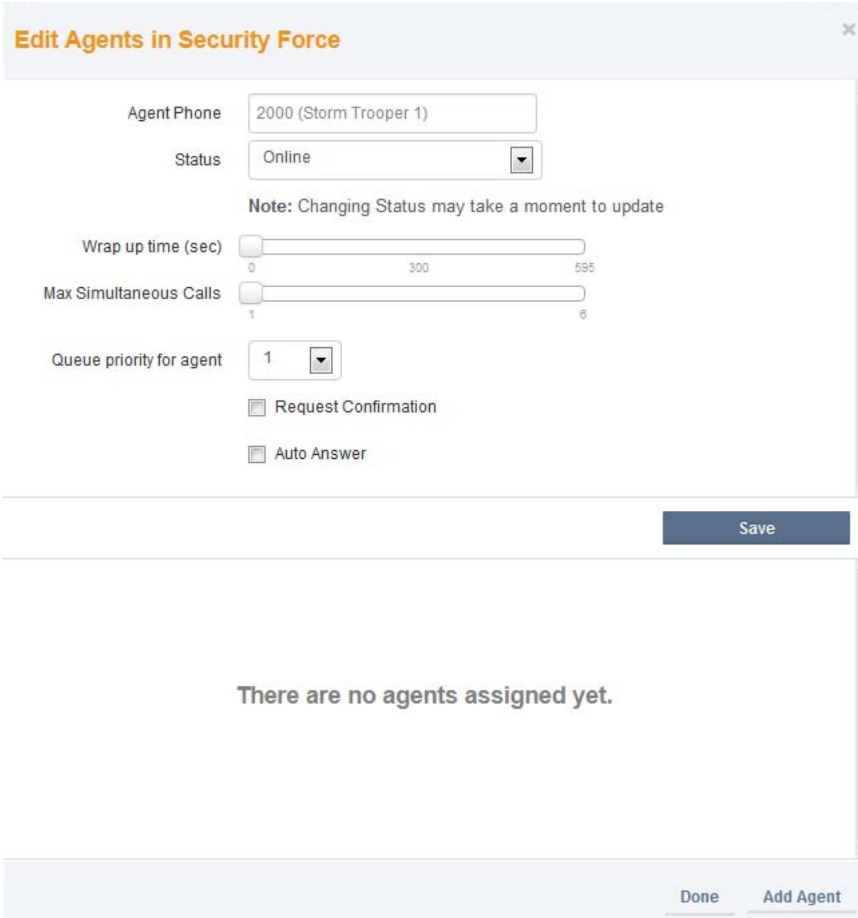
Click **Save** at the bottom.

Now that the queue is set up, you need to add some agents (extensions) to the queue. To add agents, go back to the **Call Queues** page, select the ring-all queue you just added, and select the **Edit Agents** icon. 

Name ▲	Owner	Type	Callers in Queue	Agents (Available)
Force Queue - 10	10	Call Park	0	-
Force Queue - 11	11	Call Park	0	-
Security Force	4000	Ring All	0	0 (0)

(Continued)

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



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

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

Click **Save**.

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

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

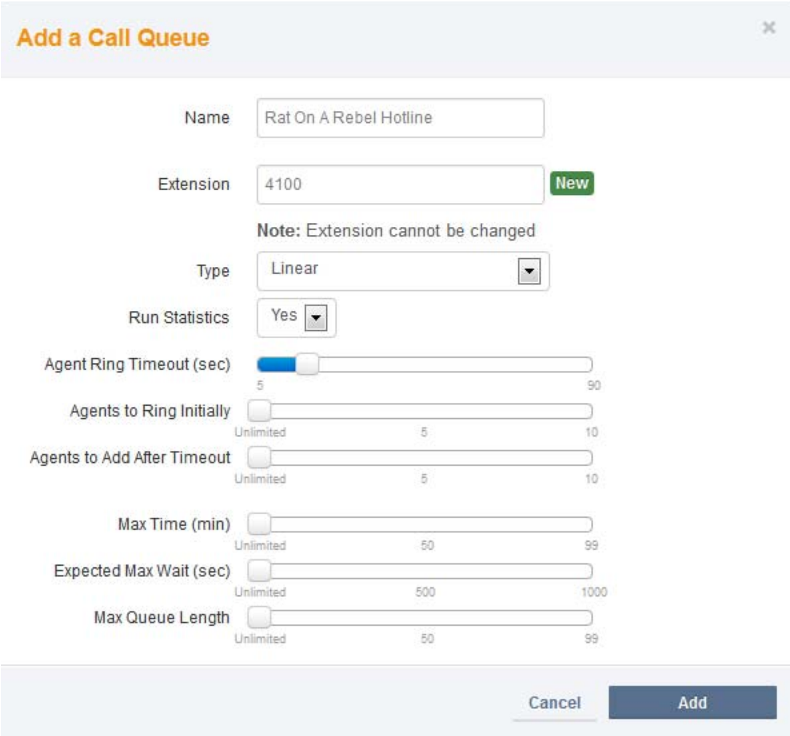
Standard queues

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

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

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

Create a linear queue as in the following:



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

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

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

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

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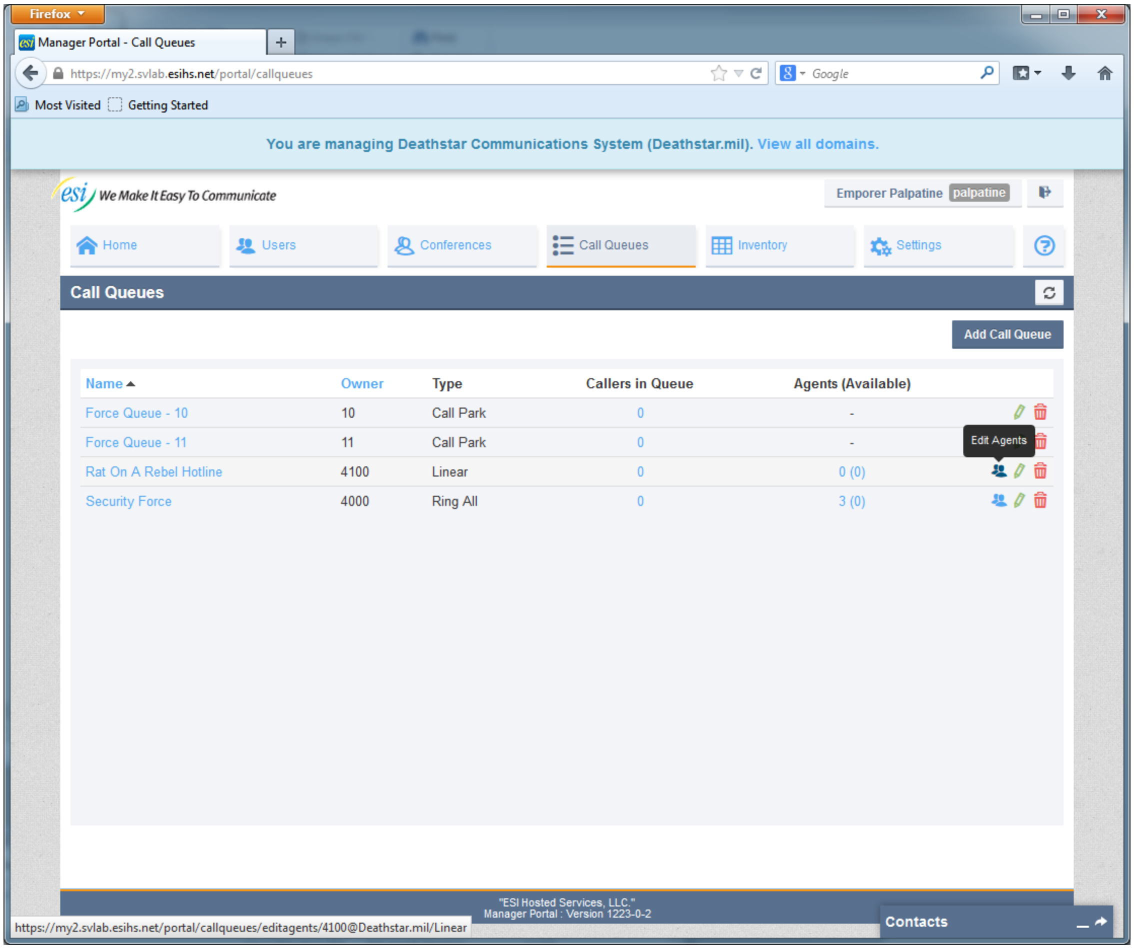
Adding agents to the queue is done in the same way as with the ring-all queue.

Select the **Edit Agents** icon  on the same line as the linear queue.



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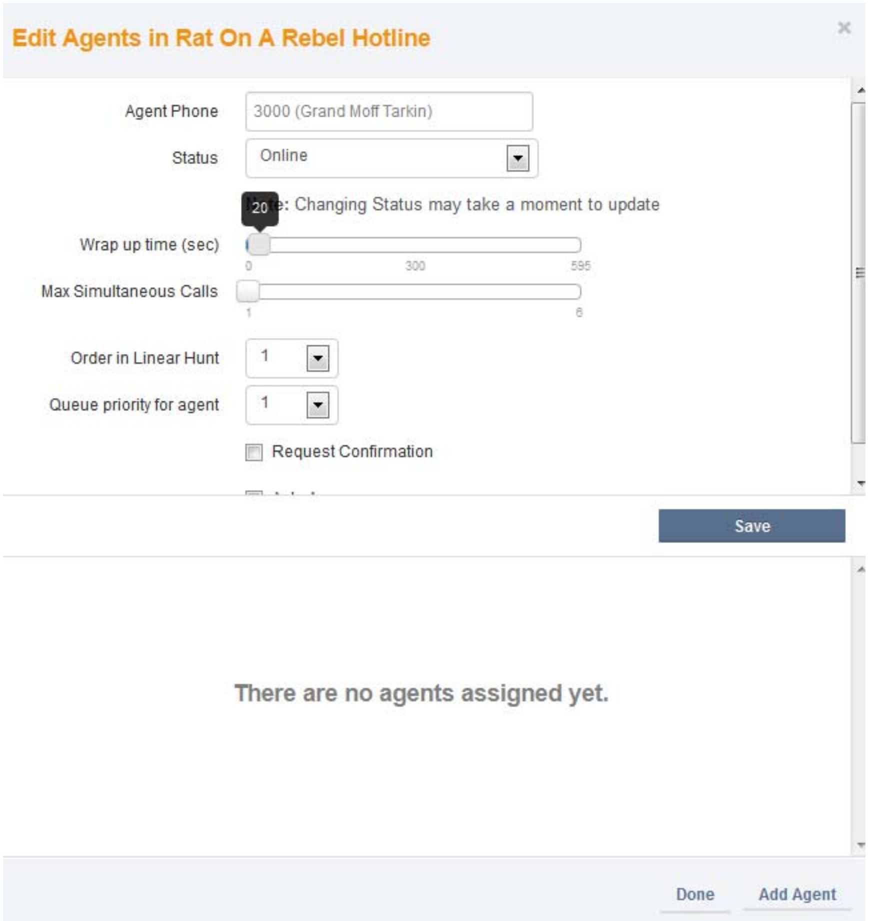
In the **Edit Agents** dialog, select **Add Agent** at the bottom right. Further options will expand in the dialog box. Since this is an ACD-type queue, the other options are valid.



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

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

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

Leave the **Max Simultaneous Calls** setting at **1**.

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

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

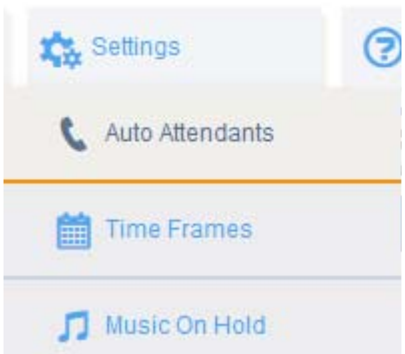
Click **Save**.

Configuring auto attendants

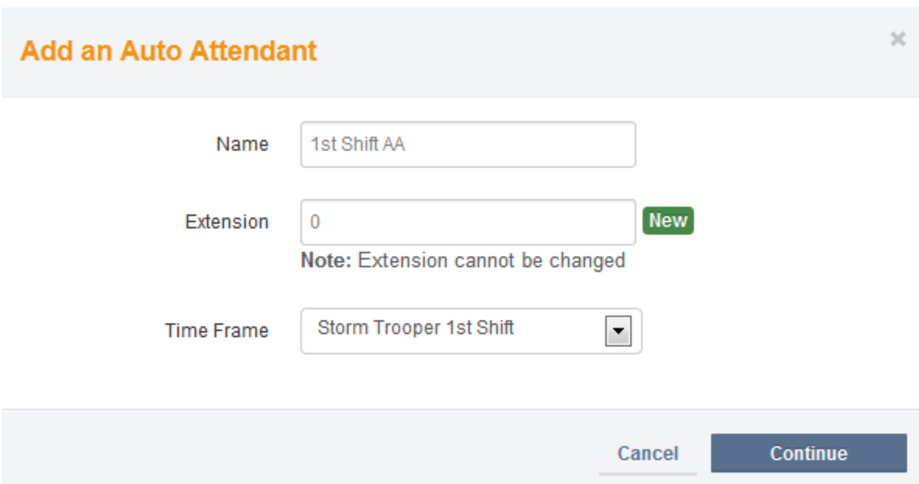
You can create a default **auto attendant** or create one for use in a specific time frame. If you want separate auto attendants for business hours and after hours, use the specific time frame (but create them both on the same extension). Choose the same extension each time, selecting a different time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

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

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



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



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

Select **Continue**.

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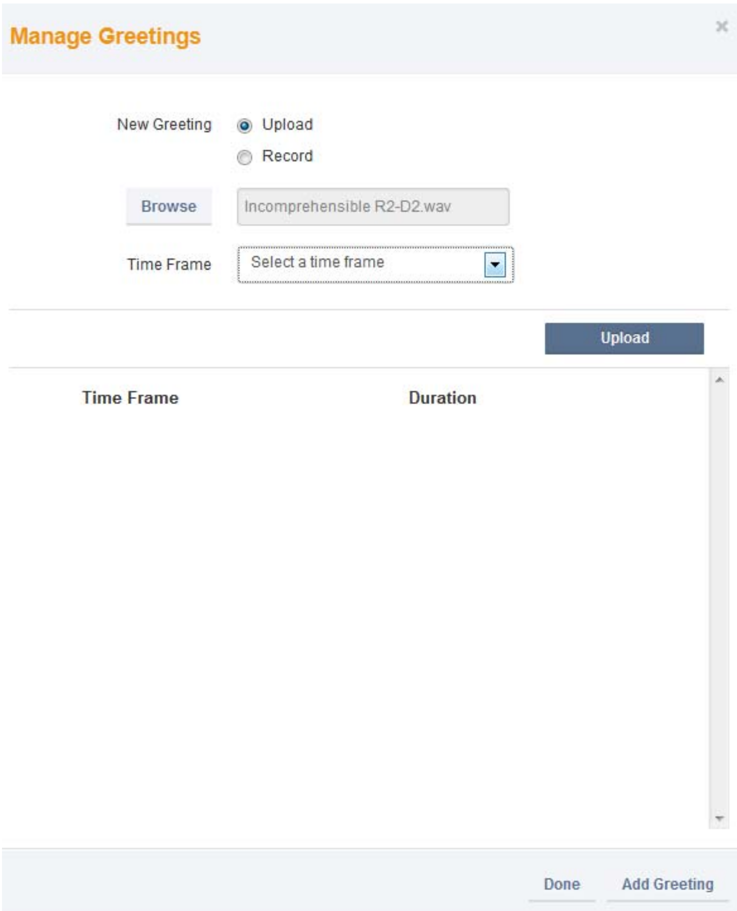
In the **Auto Attendants** screen, select the **Manage** icon (a speaker) next to the introductory greeting box.

This will bring up the **Manage Greetings** dialog box.

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



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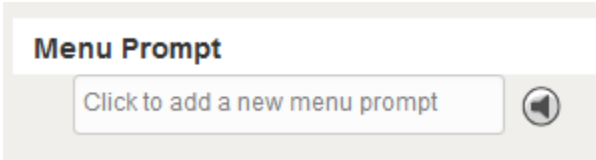
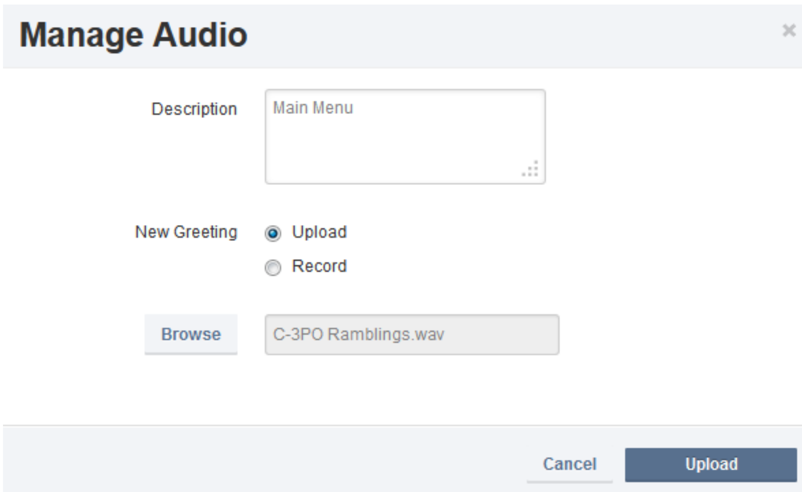
In the **Menu Prompt** area, select the speaker icon.

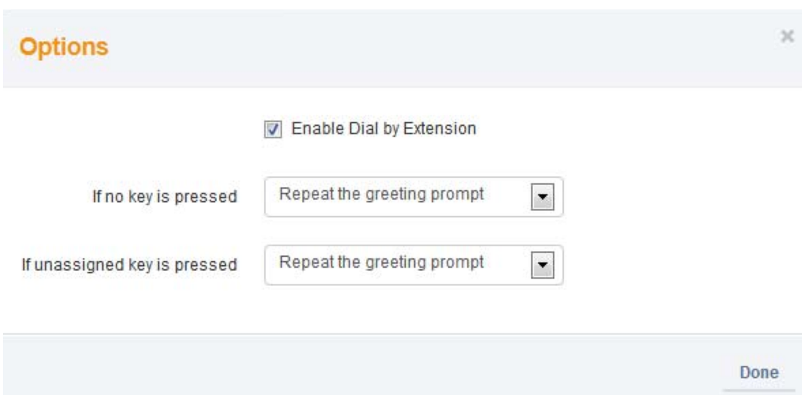


This will bring up the **Manage Audio** dialog box.

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



Clicking the **Options** button brings up the **Options** dialog box.



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

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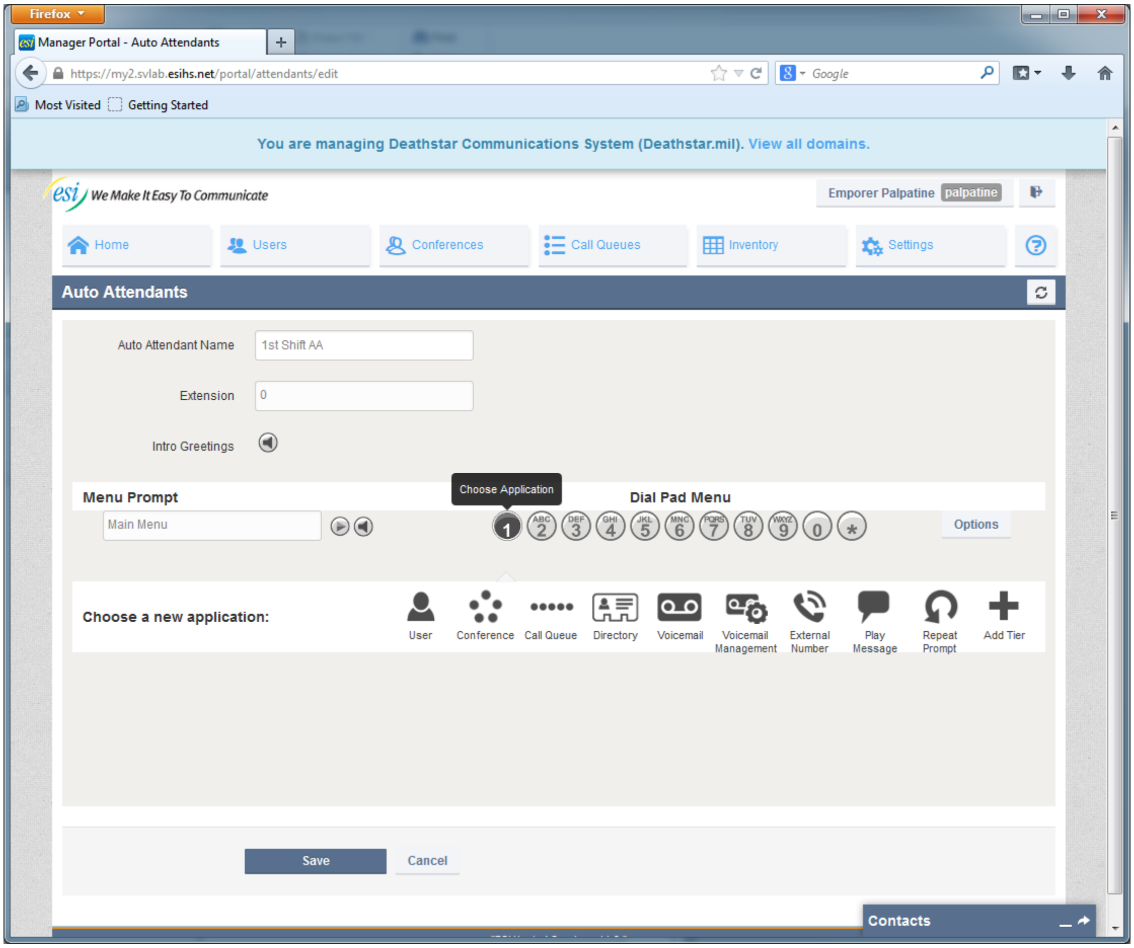
Programming the auto attendant options is very simple.



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

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

Additionally . . .

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

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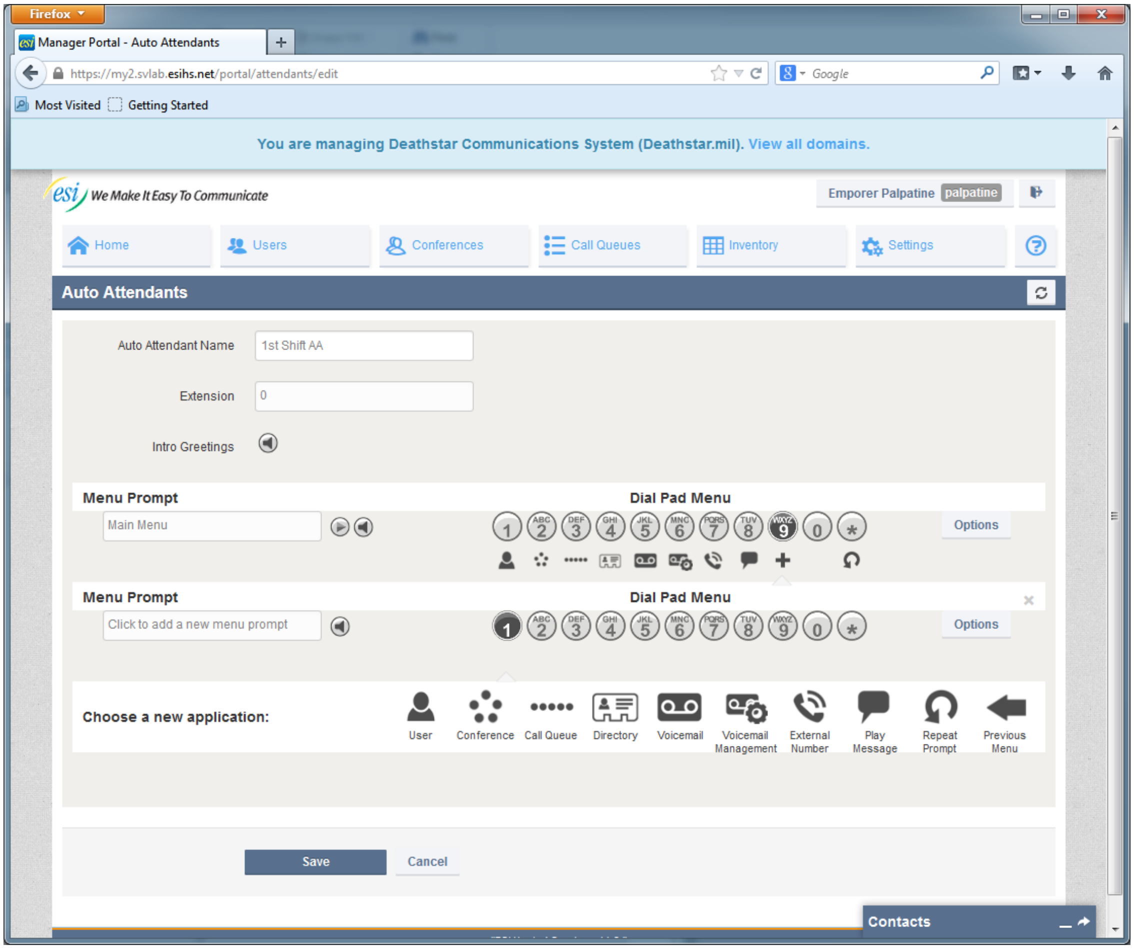


When done, click **Save**.

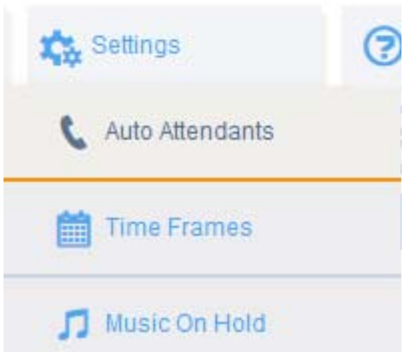
At this point, you can create additional auto attendants.

Configuring music on hold

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

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

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



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

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

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

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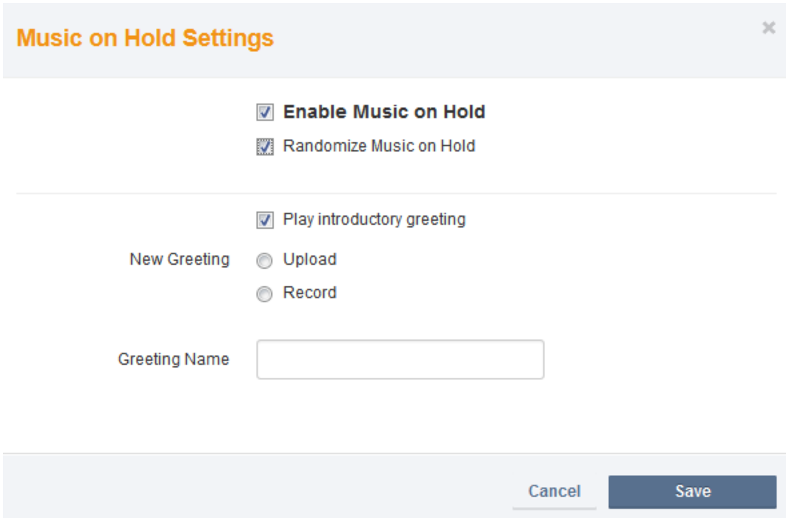
Additionally, clicking **Settings** will give you an option to **randomize** the list of music files. You can also add an introductory greeting for promotional offerings or any other message.



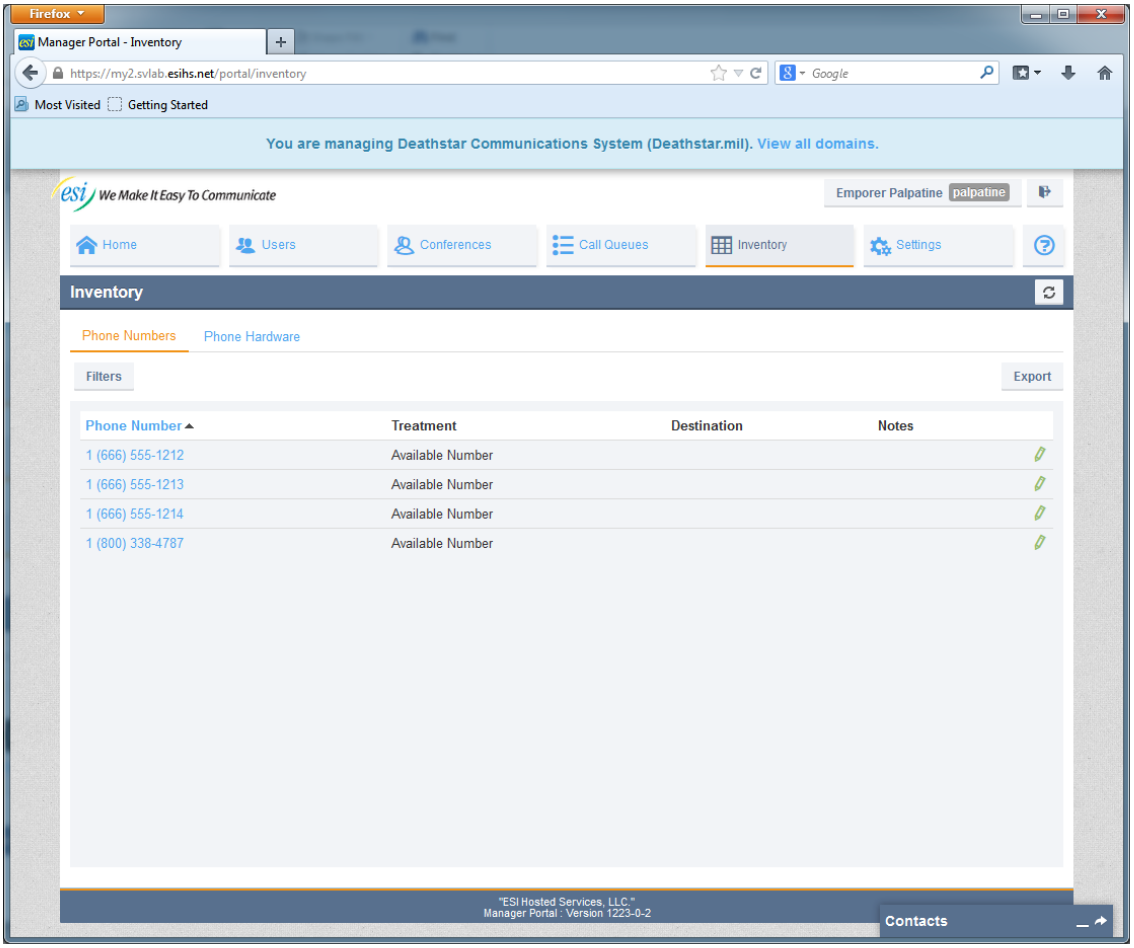
Another included capability is adding different music on hold to the call queues or, for that matter, any (other) extension. Enter the extension in the search field ("Find a user's music").

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

Assigning DID and toll-free numbers

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

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



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

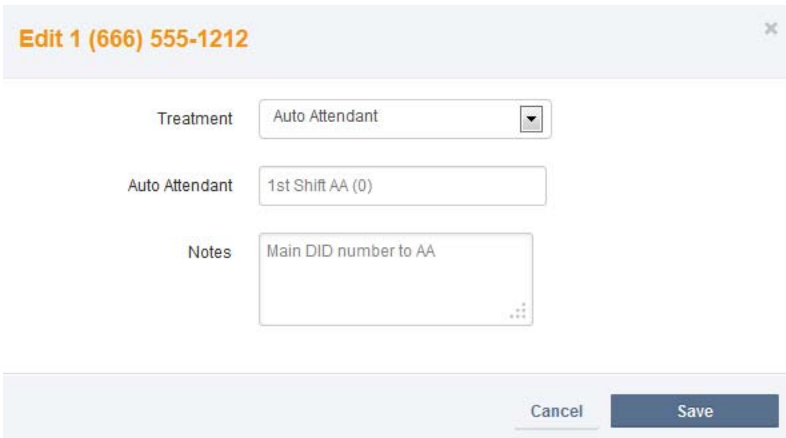
(Continued)

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

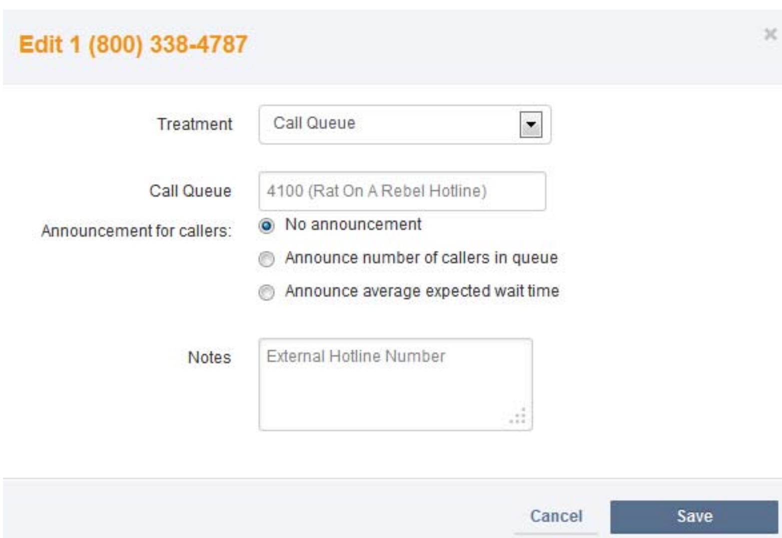
The **Edit** dialog will appear.

For **Treatment** . . .

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



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



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

Conclusion

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

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

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

May the force be with you.

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