Esna iLink Pro allows users to take advantage of UC functionality within a web browser. It is installed on the local computer as an extension to Google's Chrome browser, or as an add-on to Microsoft's Internet Explorer. It provides access to your contact list and the company directory, so making telephone calls and Internet messaging is only a few clicks away. All voice and email messages are reachable through iLink Pro. Your location and availability can also be controlled, so contacts and colleagues always know how to reach you.

iLink Pro provides a complete mobile UC solution that meets your most demanding communication needs.

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INTRODUCTION

CONFIGURING THE SITE PROFILE

PROGRAMMING COMMANDS

- Parameters
- Settings Object
- Profile Object
- Example
Esna iLink Pro allows users to take advantage of UC functionality within a web browser. It is installed on the local computer as an extension to Google's Chrome browser, or as an add-on to Microsoft's Internet Explorer.

Both versions are designed to integrate with existing Google solutions, allowing you to easily access UC features on a already familiar platform.

iLink Pro provides access to your contact list and the company directory, so making telephone calls and Internet messaging is only a few clicks away. All voice and email messages are reachable through iLink Pro. Your location and availability can also be controlled, so contacts and colleagues always know how to reach you.

iLink Pro provides a complete mobile UC solution that meets your most demanding communication needs.

**Note:** By default, Chrome will block pop-ups while browsing. iLink Pro, when used as a plug-in with Salesforce, requires pop-ups to access advanced searches to identify incoming callers and access records. To ensure complete functionality, enable pop-ups when using the Salesforce plug-in.

**Note:** Microsoft Internet Explorer 11 or later is required to install the iLink Pro add-on. There are no version restrictions for Google Chrome.

**Warning:** Running multiple editions of iLink (iLink Pro or iLink Pro Desktop) at the same time will cause conflicts between the programs. Disable all other editions except iLink Pro, if installed, to avoid problems.
Downloading and Installing

Esna iLink Pro can be installed as an extension to Google's Chrome, or as an add-in to Microsoft's Internet Explorer web browsers. Follow the appropriate procedure outlined below.

Installing to Google Chrome

The Esna iLink Pro extension is installed from the Chrome Web Store.

1. Open the Chrome web browser and go to the Chrome Web Store at https://chrome.google.com/webstore.
2. In Search the store, type iLink and hit enter. Click on Extensions.
3. Click + ADD TO CHROME beside Esna iLink Pro to launch the installer.
4. When prompted, click Add Extension to confirm the installation.

The installation is complete. You will be required to select the credentials to use to login to the extension.

Hint: The site administrator can setup user or company profiles to automatically install (push) and configure iLink Pro. Refer to Google's documentation at the address below for further details: https://support.google.com/chrome/a/answer/1375694?hl=en
Installing to Microsoft Internet Explorer

The Esna iLink Pro add-on is installed directly from the link shown below. The add-on is controlled and managed by the Esna iLink Add-Ons for Internet Explorer application.

**Note:** The add-on is supported by Internet Explorer 11 and later.

**Important:** Downloading applications through iChrome requires access to the following sites: clients2.google.com and clients2.googleusercontent.com. Ensure that your network firewall and security protocols are open to both locations. If access is impaired, the download may fail with errors.

1. Open Internet Explorer and go to https://manage1.esna.com/iChrome/iChrome.application.
2. The installer will prepare to install the add-on.
3. A prompt to confirm the installation will appear. Click **Install** to continue.
4. If presented with a security warning concerning files to be installed, click **Run** to continue with the installation.
5. Internet Explorer should not be running during the installation. If prompted to close IE, select:

   **Yes**: Click here to automatically close IE before continuing with the installation.  
   **No**: Use this option to allow IE to keep running during the installation. IE must be restarted before using the program.  
   **Cancel**: Close IE manually, then click this button to continue with the installation.

6. The Add-on will be installed.

7. When the installation is complete, the **Esna iLink Add-Ons for Internet Explorer** window will appear. If you did not close the browser, this screen will appear after IE has been restarted.

   Click the box for Esna iLink Pro to enable the extension.
8. A check will appear in the upper right corner of the Esna iLink Pro box indicating that the extension has been loaded into Internet Explorer.

The installation is complete. You will be required to select the credentials to use to login to the add-on.
The Esna iLink Add-Ons for Internet Explorer

The **Esna iLink Add-Ons for Internet Explorer** tool is used to enable and disable Esna’s add-ons for Internet Explorer. Whenever IE is running, the Esna iLink Add-Ons for Internet Explorer icon will appear in the Windows System Tray.

1. Double-click the icon to launch the selection program.

**Hint:** After the installation, the Esna iLink Add-Ons for Internet Explorer will only appear in the system tray once Internet Explorer is started.

2. Click an Add-On to enable/disable it in Internet Explorer.

**Note:** Each add-on requires separate licensing. Enable only those add-ons you have purchased.

**Note:** Esna iLink Pro and Esna iLink for Cisco Jabber cannot be run at the same time. Launching one will force the other one to close. Esna iLink for WebEx can be run with both of the other add-ons.
Additional Considerations

- The selected add-ons and Esna iLink Add-Ons for Internet Explorer will be launched automatically each time that Internet Explorer is started.
- Closing the Esna toolbar will disable the add-ons for Internet Explorer. To relaunch, the add-on must be enabled from within IE (go to Tools > Manage Add-Ons under Toolbars and Extensions).
- If the add-on cannot connect or login to the server, the icon in the Esna toolbar will be gray ( ). Click the icon to start the login procedure.
- In IE, removing all websites listed under Compatibility View is required for Esna iLink Pro to be able to login to the servers. Go to Settings > Compatibility View Settings and ensure that there are no websites listed.
Logging In

Launching the Extension / Add-On

Start the application by clicking on the Esna iLink Pro icon.

If enabled, clicking on the slider will also start the program in both Chrome and Internet Explorer.
Logging In

The login procedure for the Esna iLink Pro extension for Chrome and the Internet Explorer Add-On are identical. If the extension does not start automatically, click the icon or the slider.

1. At the login window, choose which credentials to login with from the dropdown menu.

2a. When selecting Google Credentials, you will be asked which Google account to use to access the program with. Choose an account, or enter the details for another.

Click Allow to give the program the necessary permissions to your data.
2b. When selecting **Office 365** credentials, you will be taken to the login window where you must enter your credentials. When finished, click **Sign in**.

![Sign in window](image)

**Note:** An active Office 365 account is required to use this option.

2c. When selecting **Salesforce Credentials**, a browser page will open to the Salesforce login screen.

   Enter your Salesforce username and password in the spaces provided.

   Click **Log in to Salesforce**.

   If prompted to grant iLink Pro the necessary permissions, click **Allow**.

![Salesforce login screen](image)

**Note:** An active Salesforce account is required to use this option.

2d. **Use Esna credentials** provides a web-based authentication solution for sites where security profiles and other considerations make other login options impossible. A user account must be created before a login can proceed.

   When prompted, enter your OnEsna username and password. Click **Login**.

   If prompted to grant iLink Pro permissions, click **Accept**.

![Esna login screen](image)
2e. Choose UC credentials, then enter the voice server name. Login using your alphanumeric username and password from Esna Officelinx.

3. Click **Connect** when ready. To login with different credentials, click **Change account**.

4. The application has been installed. The icon will be gray 🅰️ when the program is not running, and it will be in color 🅱️ after log in.

5. Click the iLink Pro icon 🅱️ or the slider to launch the program.

**Note:** The slider is an option that is enabled from the Settings > Options page. Enable the **Embed to all opened pages** item. The panel displayed when clicking on the slider is independent of the panel that is opened from the icon; each can be used to display different information. Once this setting has been changed, close and relaunch the browser.
The Main Screen

This is the starting point for all interactions within iLink Pro. Clicking on an area of the window will open up additional possibilities.

Click on a part of the image, or select an item from the following list.

- Searching for Contacts
- Presence Management
- Favorites
- Groups
- Menu Options

From any location within the program, clicking the icon (upper right corner) will return you to the main page.

Many pages include a Previous icon that will return you to the previously viewed page.

**Note:** The Main Screen displays all of the contacts that are currently assigned to the group Favorites. Create other groups, or use the Search bar to find the person you need.

Incoming Notification

Whenever a message or telephone call has been received, a red light will flash in the menu bar to alert the user.
Searching for Contacts

The search bar appears throughout the application just below the presence bar. Use this field to look through the contact database to find the person you want to connect with. The results of a search will displace the current screen.

To search your personal contacts list, the company directory, and your Google contacts, type the mailbox number, extension, email address, or the contact's first or last name into the **Search or dial** field.

A search for **John** will find:

- John Carter
- Brian Johnson
- it.guys@imjohn.com.

All contacts that match the entered parameters are displayed. Click on a contact to view their details.

Click **X** to clear the search parameters and return to the previous page.

Call the Contact

Click the Call icon to place a telephone call to the contact. The number dialed is the number the contact has associated with their current location. For example, if their presence is set to "Out of Office," their cell phone will be dialed, but if they are "In Office," then their extension will be called instead.

The device configured for your own current location will ring to place the call.
Contact Options

Click on the button beside a contact to view the Actions menu for the contact. Select the appropriate feature. Refer to the section Action Items for details on all of these options.
Presence Management

The bar across the top throughout the application displays your current location, availability, and default telephone device. Clicking on this area also allows you to modify your status. Share with everyone in your contacts list your location and whether or not you are free.

There are several programmed options for location, and you can create your own using the Web Client. Click Manage Locations to create and modify the settings on your locations. Click in the presence bar at the top of any page.

Locations

This tab shows your current location, availability status, and the number where you can be reached.

The locations, default availability, and the numbers where you can be reached at each location are automatically adjusted based upon the settings for each item established through Web Access. Your presence is also synchronized with your calendar and will be updated automatically.

A similar display appears beside each contact.

Click on the pane to change these settings.

Locations

The most common locations have already been added to iLink Pro. Customized locations can be added, and the pre-programmed locations can be modified using the Web Access (click here for more details).

Location provides a quick description of where you are. The default availability configured for each location is also displayed here.

Click the location you want to use. This will override your calendar setting. The built-in locations are:

- In office
- Meeting
- At lunch
- Away on Business
- At home
- Vacation
- Temporary
- Mobile
- Extended Absence
- Remote office

Hint: Your presence is synchronized with your calendar. If you have a meeting scheduled for a specific time, iLink Pro will update your presence automatically. When the meeting is set to start, your location will be changed to Meeting and your availability will be set to Unavailable. When the meeting is scheduled to end, your presence will be returned to its default.
Availability

✅ Available: Enabled by default, click this icon to show other users that you are able to take calls and join chat sessions. While available, your location icon will be green.

🚫 Unavailable: Enable this option to show others that you are not to be disturbed at the moment, and that they should try again later. Any incoming calls will be routed according to the rules defined using Web Access (e.g. transfer to voicemail or send to operator). When you are set to be unavailable, your location icon will be red.

On the phone: When you place a call or answer an incoming call, your availability icon will turn yellow to show others that you are On a call. Once the call has ended, your availability will return to its previous state.

People who are offline have their icon shaded gray. The location displayed is their last known location.

Only one of these options can be enabled at one time.

Schedule

Whenever you manually change your presence, you can specify the duration that the changes are to be maintained. After the stated period, your presence will revert to its previous setting.

📅 Follow calendar: Set this item to have your presence synchronized with your calendar. This is the default setting.

📅 Until next scheduled: Enable this option to keep the current custom settings until the next event scheduled in the calendar. At that point, Presence will again follow the calendar.

📅 Interval: Select this option to be prompted to enter the length of time to keep the custom settings. Once this duration has passed, Presence will again follow the calendar. Choose an item from the Set interval menu.

Advanced

🔍 Manage locations: Use this option to launch the Web Access program in a web browser. Web Access allows you to create custom locations, and to set the default telephone numbers for each one. You can also configure what happens to an incoming call when you are unavailable. Click here for more information on Web Access.

Extensions

This tab allows you to set the number where you can be reached. This setting will override your calendar. The available numbers are setup using Web Access.

Extensions

Any extensions configured for making calls are shown here. Select the extension to use to receive incoming calls. The chosen telephone set will ring when a call is received.

Dial using

When you place an outgoing telephone call, the number chosen here will be the one used to make the call. The telephone set may ring, and you will be connected once you answer.
Manage labels

Use this menu item to give the device a descriptive name. For each telephone number and extension listed, you can enter a new name to use when displaying that set.

```
Device labels
2345
Type it a new name here...
6345
or here...
+1 (095)0533312
here.
+1 (095)076700
You get the idea.
```

[Ok] [Cancel]
Favorites

This screen is the starting point for all interactions within the application and shows all of the contacts in your Favorites group. Contacts can also appear in other groups, or use the Search field to look through the entire database.

Each contact record contains 3 tabs. Click on the appropriate portion of the window to open that tab.

Messages

The Messages tab contains the Timeline for the person, which are events related to the contact you have chosen to display. Text chat sessions are also displayed here, with the space to enter outgoing messages at the bottom of the window.

Timeline

The Timeline is the accumulation of all Alerts configured for contacts within the application. Only Alerts that apply to the selected contact are shown here.

A time stamp appears above the event.

Click here for more information on configuring Alerts.
Chat

To send a text chat message to the contact, type your message in the space provided at the bottom of the screen and click **Send**.

All messages in the conversation appear in the window above the text entry box, with the most recent messages appearing at the bottom, scrolling up as new messages are received. Timeline entries will be scrolled upwards as well.

Your outgoing messages appear with your profile picture on the right. Incoming messages show the contact’s picture to the left.

![Chat interface](image)

The contact will see a flag on the extension icon in the browser address bar, and a light will flash within the extension to alert the user of the incoming message.

Call

The **Call** tab is used to initiate a telephone conversation with the contact.

**Note:** You do not need to enter any additional digits to reach an outside line (where applicable) as this has already been configured through the PBX.
Actions

Use the Actions tab to interact with the contact in other ways. Not all options are available for all contacts.

Some of these options require additional licensing, so contact your administrator for details.

Click [here](#) for a complete description for all of these options.
Groups

Large lists of contacts can make it difficult to find the one that you need. Organize contacts into logical Groups to make finding them easier.

From the Groups tab you can create, delete and rename groups, as well as control the membership of each. Each person can be added to more than one group. Each group that you create, and the members it contains, are specific to your account and will be the same when you connect through any device. The Officelinx database is not affected by these changes.

The Favorites group is created automatically by the application and cannot be deleted or renamed.

Add group

Select Add group to create a new collection for contacts.

Give the group a name, then click OK to create the group.

Once a group has been created, you can add contacts through the Manage group members option within the group.

Members

Click on any group to view the list of people it contains.

Selecting a contact will open their details page where you can view their timeline or begin a chat session. You can also place a call through your default device by clicking the telephone icon.
Edit Group

With a group opened, use the Edit Group icon to change the name of the group, or to remove it from the application.

- Enter a new Group name and click OK to confirm the change.

- Click Delete this group to permanently remove the collection from the program. Click OK to confirm this action. All members of the collection will be removed from your subscribed list but will remain in the database.

Manage Group Members

Click the Manage members button to see all contacts who have been placed into this group.

- Add new members to the group using the Search people field. When the person has been located, click the Add icon to the right of the person’s name to add them to the group.

- Click the trash can to the right of the contact’s name to remove them from the current group. Their status in other groups is not affected.
**Actions**

Under the **Group Actions** tab, you can connect with all members of the chosen group through the selected channel. Click [here](#) for a complete description for all of these options.

---

**Directory**

Open the **Directory** tab to view the company phone book defined on the Officelix server. The groups created there, and the contacts they contain, are displayed.
The Menu button at the top of the screen provides instant access to your chat and telephone archives. It also houses the program configuration items so you can customize your experience.
Use the options under **Settings** to configure the program to work the way that you do. Specify the 3rd party programs that you want iLink Pro to be integrated with, and configure the various notifications that keep you up-to-date with those around you.

**Options**

Configure your Options to have the application work the way you do. Each item on this list toggles on / off. All of these settings are optional. Although none are required, some are enabled by default.

**Phone recognition**

These settings control any additional numbers that are added to a outgoing dialed number.

- The administrator will configure the values for **Area code** and **Country code** on the server, and those values will be displayed here. You should only change these settings if you are out of the office and require different local dialing rules at your location.
- **Always show all matches** changes the manner in which search results are displayed. When enabled, the program will show all matches to a search, with multiple versions of the phone number parsed using the local dialing rules (e.g. enter 7079700, results are +1(905)707-9700 or 90 5 707 9700). When disabled, the phone number will not be parsed and will be shown and dialed precisely the way it was entered (e.g. 7079700).

**Integration**

**Integration** controls how iLink Pro interacts with your other applications.

Enable **Google calendar** to allow iLink Pro to update your presence using the entries in your calendar. For example, if a meeting is scheduled in Google Calendar, your presence in iLink Pro will be changed automatically to **Meeting, Unavailable** at the correct time to reflect your status. After the meeting, it will be returned to the default value.

When **Google Hangouts** is enabled, the presence bar will be updated whenever you join or leave a Hangout.

**Embed to all opened pages** will add the iLink Pro slider to the browser window to make accessing the extension much easier. Reboot the browser after setting this option to complete the change.
Tutorials

Turn on **Show all tutorials** to enable the in-program pop-ups that will help guide you through the application.

Alerts

This menu allows you to define how and when the program provides notifications regarding your contacts.

**Sounds**

Choose whether or not the application will play a sound when an alert is generated.

- **Enable Use sounds** to play a sound effect when a notifiable event occurs. If this item is turned off, only on-screen prompts will be used for notifications.
- **Silent if unavailable** will mute all sound effects configured for alerts if your presence is set to Unavailable. This prevents your meetings from being disturbed.
Notifications

Specify when the application alerts you to changes with your contacts. Whenever a contact’s status changes, a pop-up alert in the Windows desktop will be generated.

A notification may be triggered when the following occur:

- **Online status change** - the contact logs into or logs off from iLink Pro.
- **Availability change** - an online contact becomes available / unavailable / away.
- **Incoming chat** - generates an alert whenever someone else wants to start a text chat session with you.
- **Active call** - an alert is generated when a contact starts or ends a telephone call.

![Windows Desktop Alert](image)

Timeline options

Configure these options to filter the alerts generated in the **Timeline** for each contact.

A Timeline event may be triggered when the following occur:

- **Online status change** - the contact logs into or logs off from iLink Pro.
- **Location change** - an online contact changes their location (i.e. from **In office** to **Meeting**).
- **Phone status change** - adds to the Timeline whenever a contact answers their phone or hangs up after the call.
- **Calls** - a Timeline entry is generated whenever you start or end a telephone call.

![Contact Timeline](image)
Logout

This item will terminate all functions and disconnect you from the program. You will be returned to the login screen. Other users of the system will see you as Offline.

Click Connect to relaunch the program.

Conversations

Conversations provides an archive of any text chat sessions you have had. A new chat session can be launched from here as well.

Start Conversation

The Start conversation button is used to create a new chat session. You will be asked to select a contact to invite. Enter a contact name or extension into the search bar and click next to the correct individual from the list returned.

Click OK to start the chat session. The person that you invited will receive a notification through iLink Pro that they are requested to attend.
Phone

The Phone tab contains the history of your Active and Recent telephone calls. The Dialpad allows you to manually dial a call from the computer.

Active Calls

This tab displays all ongoing (Active) telephone conversations. Click on a listed call to view Call Controls.

Recent Calls

The specifics for Recent telephone calls are kept here. The details of the call are shown.

- Contact name (and # of calls)
- Contact number or extension
- Call duration or Call not answered
- Date and time of call
- Answered/Not Answered

The Recent archive will hold call details for some time, after which they will be removed from the system.
Click on any Recent entry to reconnect with that person. Click the contact to place a call back to the listed number, or click the arrow to choose the number to call for that contact.

Dialpad

Use the Dialpad to place a telephone call to any number or extension.
Use the mouse to click the keys, or enter the numbers through the computer keyboard.
When ready, click Dial to place the call through the currently selected telephone device.

Collaboration

A document that is stored on Google Drive and shared with other people can be used to start a meeting.
The document must be open on your computer (e.g. in Google Docs), not viewed directly from the drive, before it will appear under the **Collaboration** tab.

Click the document to review the list of people that it has been shared with, and to start a WebEx meeting, a Google Hangout, or a conference call with the entire group. You can also review the locations of each contact on the list through Google Maps.

Click **Members** to see a list of all of the people the document is shared with.

Click on one of the Collaboration **Action** options to start the selected event. All contacts with whom the document has been shared will receive an invitation through iLink Pro (for Chat and Google Hangouts), or through an email (for WebEx).

Click **here** to see an explanation for all action items.
Call Controls

Call Controls are available whenever a call is made through the iLink Pro dialer, or from the keypad of the device.

From the telephone, the **Hold**, **Mute** and **Hangup** functions are supported. When present on the device, the **Speakerphone** is also available and is controlled from the set.

The keypad within iLink Pro also supports call transfers during a call.

- **Put on hold** will pause the call, muting the microphone and allowing another call to be placed.
- When **Transfer** is selected, the current call is put on hold. Place a second call to another contact.

When the second number called begins to ring, click **Complete transfer** to send the call to that number.

- **Mute audio** will stop the outgoing audio stream until this item is pressed again. This prevents local conversations from being broadcast to all listeners.

- Click **Dialpad** to bring up a number pad which will allow you to enter additional keystrokes for the call. If you need to enter a security code or a mailbox number, use the Keypad.

- When sending a call to another number, click **Complete Transfer** to forward the call once the second number starts to ring.

- Use **Cancel Transfer** to terminate a call to a new contact before they answer.

- Click **Hangup** to end the call.

You can navigate away from the **Call** window without interrupting the call.
Click-to-Dial

On web pages that contain telephone numbers, Esna iLink Pro will identify them and place a click-to-dial icon beside each one.

Click the icon to place a call to that number through iLink Pro.

+1 905 707 9700
Action Items

At various places throughout the app you can create a new connection with the contact or group being viewed. Not all of these channels may be available. Contact your administrator for details.

**Note:** Some of these communications channels require additional licensing. Contact your reseller for details.

The available contact methods are:

- **WebEx**
- **Show on a map**
- **Share web page**
- **Hangout**
- **Share location**
- **Share web page**
- **Conference**
- **Share document**
- **Clear history**
- **Groups**
Cisco’s WebEx and Google’s Hangouts are applications that can be used to setup larger meetings, and can include desktop and program sharing, whiteboards, and audio / video conferencing. Both applications may require additional licensing, extensions or plug-ins to be installed.

**Note:** The Esna iLink for WebEx application must also be installed if WebEx meeting support is required.

Launch a WebEx meeting or a Google Hangout in a browser window. When you start an event, the viewed individual, all members of the group or the collaboration project automatically receive an invitation to attend. More people can be added before the event starts, or after it has begun.

If there is a chat session currently in-progress, it will continue during the event.

1. **Select WebEx or Hangout.**

   **Note:** Where appropriate, the necessary licenses for each program must be purchased separately.

2. For the person who started the WebEx meeting or Google Hangout, Esna iLink Pro will automatically launch the chosen application to host the meeting.

**For WebEx:**

The **iLink for WebEx Instant Meeting** window appears which allows you to setup the meeting parameters (i.e. password access) and add additional participants. The selected contact is already included as an attendee.

**Click Create meeting now** to launch the WebEx meeting in a browser and send each attendee an invitation through both their iLink Pro chat window and email. The invitation includes a link to join the meeting.
For Google Hangouts:

Google Hangouts will launch in the browser window. Click Join to start the meeting. The contact will receive an invitation in the chat window of iLink Pro. The invitation includes a link to join the meeting.

Hint: Refer to the WebEx or Hangout documentation for details on available features for these applications.

Conference

Clicking on the Conference button will place a telephone call to the contact. If activated from within a group or a collaboration project, all contacts in the collection will be bridged together into a single telephone conference call.

The hold, call transfer and hangup call controls are available within iLink Pro while on the conference call. The full range of Esna WeLink Conferencing controls are available through the telephone. Refer to the Esna WeLink Conferencing manual for complete details.

Note: The Conference feature requires the Esna WeLink Conferencing server to be installed at your site. Contact your vendor for purchasing and licensing details.
Show on a map 📍

Use **Show on a map** to display this contact’s location using Google Maps.

When used with more than one contact (e.g. Groups), the map will show all of those people on the map.
Share location

Select this item to send a Google Maps image through Chat that shows your location.

Click I’m at above the map to open Google Maps in a browser with a larger version of the map displayed.
Share document

Use this option to share a document with the contact. The document must be stored on Google Drive, and you must have it open in the browser before it will appear in the list to share.

Once shared, the contact or the group will receive a link in their chat window that will take them to the document. The contact(s) will also be added to the list of people authorized to view the document.

Click the document to share to send a link to the document to the contact(s).

Share web page

The Share web page item will display a list of all pages open in the browser (Chrome or IE, depending upon which one is running Esna iLink Pro). Click on the desired page to send the contact or group a link to that site in the chat window.
Clear history 🗑️

This item will remove all stored entries for this contact. These include records of chat sessions, timeline entries, and telephone conversations.

Groups 🧑‍🤝‍🧑

**Groups** are collections of related contacts that are created by the user as required. The Groups button allows you to assign the contact to an existing collection. Groups are managed through the Groups tab here.

Place a checkmark in the box beside the group(s) you want to add the contact to.

**Note:** The **Favorites** group is embedded in the application and cannot be renamed or deleted. People added to Favorites appear on the main page of Esna iLink Pro.
Salesforce Integration

iLink Pro can be integration with both Salesforce Classic and the new Lightning user interface. The connection procedure is different for each integration. Refer to the appropriate section for your site requirements.

Salesforce Classic Integration

Esna iLink Pro can be installed as a plug-in to the Salesforce CRM program. This provides users with contact, presence, and call management functions directly within Salesforce.

Note: Esna iLink Pro provides support for both the Salesforce Classic view and the Lightning user interface. This section is for users of the Salesforce Classic interface.

Caution: Salesforce and Esna iLink Pro must both be installed and operating correctly before proceeding.

Call Center Definition File

The following file will be imported into Salesforce to setup the integration. Use any text editor (e.g. Notepad) to create the file. When ready, save it in the XML format.

Hint: Copy the text and paste it into Notepad, then save it with the TXT format. Then, in Windows, rename the file, replacing the TXT extension with XML. For example, rename FILENAME.TXT to FILENAME.XML.

```xml
<callCenter>
  <section sortOrder="0" name="reqGeneralInfo" label="General Information">
    <item sortOrder="0" name="reqInternalName" label="Internal Name">iLinkCTI110</item>
    <item sortOrder="1" name="reqDisplayName" label="Display Name">iLink Call Center Adapter v.11.0</item>
    <item sortOrder="2" name="reqAdapterUrl" label="CTI Adapter URL">https://manage1.esna.com/sfcti/cti.bridge.v2.html</item>
    <item sortOrder="3" name="reqUseApi" label="Use CTI API">true</item>
    <item sortOrder="4" name="reqSoftphoneHeight" label="Softphone Height">500</item>
    <item sortOrder="5" name="reqSoftphoneWidth" label="Softphone Width">250</item>
    <item sortOrder="6" name="reqSalesforceCompatibilityMode" label="Salesforce Compatibility Mode">Classic_and_Lightning</item>
  </section>
  <section sortOrder="1" name="reqDialingOptions" label="Dialing Options">
    <item sortOrder="0" name="reqOutsidePrefix" label="Outside Prefix"></item>
    <item sortOrder="1" name="reqLongDistPrefix" label="Long Distance Prefix"></item>
    <item sortOrder="2" name="reqInternationalPrefix" label="International Prefix"></item>
  </section>
  <section sortOrder="2" name="CallResults" label="Call Results">
    <item sortOrder="0" name="Results" label="Result codes (comma separated list)"></item>
  </section>
  <section sortOrder="3" name="Matching" label="Phone matching options">
    <item sortOrder="0" name="SearchTemplates" label="Search templates (comma separated list)"></item>
    <item sortOrder="1" name="FormatTemplates" label="Format templates (comma separated list)"></item>
  </section>
  <section sortOrder="4" name="Experimental" label="Experimental options">
    <item sortOrder="0" name="ActivitySubtype" label="Apply activity subtype"></item>
  </section>
</callCenter>
```
Open CTI Integration

**Note:** By default, Chrome and IE will block pop-ups while browsing. Esna iLink Pro, when used as a plug-in with Salesforce, requires pop-ups to access advanced searches to identify incoming callers and access records. To ensure complete functionality, enable pop-ups when using the Salesforce plug-in.

Adding the Esna iLink Pro plug-in to Salesforce requires the server to be configured for OpenCTI integration. This configuration is performed by the administrator before the plug-in will work correctly for clients.

Follow these steps to ensure the proper integration of Salesforce with Esna iLink Pro.

**Warning:** OpenCTI integration with Esna iLink Pro is only possible with Salesforce version 13+.

**Warning:** The required Call Center adapter for Salesforce is only available with the Enterprise edition and higher.

1. If you have not done so already, create the Call Center Definition XML File as outlined on page 45.
2. Login to Salesforce using an account with site administrator credentials.
3. Go to the **Setup** page.
4. Go to **App Setup > Customize > Call Center > Call Centers** and click **Continue**.

5. In the **All Call Centers** window, click **Import**.
6. Click **Choose File**, and select the **Call Center Definition** file created in step 1. With that file selected, click **Import**.

7. Returning to the **All Call Centers** window, choose the newly created Call Center and click **Edit**.
8. Click **Manage Call Center Users** to add clients to the new call center.

9. Click **Add More Users**.
10. Add all of the required users to the list.
   Once all of the users have been added, click **Add to Call Center**.

11. Integration is now complete. Once it becomes available, clients will need to go to the Chrome web store (https://chrome.google.com/webstore) to download the Esna iLink Pro plug-in. Once that has been installed, you will have UC functionality available within Salesforce.

---

**Using Salesforce**

When using the Salesforce plug-in with iLink for Cisco, the interface works in the same fashion as it does when installed into a browser with the following additional integrations.

**Inbound and Outbound Calling**

When iLink for Cisco places or receives telephone calls, the program performs several functions within Salesforce to improve work flow. Instant access to contact records, and automatically creating activity log entries improves the usability of the plug-in.
Configuring Call Behavior

When receiving a telephone call, iLink for Cisco will extract the caller ID, if present, and pass this information to Salesforce. Settings made within Salesforce determine whether a pop-up is seen, if the matching client record is opened automatically, or if nothing at all occurs. This behavior can be changed by the administrator.

1. While logged into Salesforce using an administrator account, click **Setup**.

2. In the left-hand pane, go to **Build > Customize > Call Center > SoftPhone Layouts**.

3. Select a layout and click **Edit**.

4. Under the dropdown menu for **Select Call Type**, choose **Inbound**, **Outbound**, or **Internal**.

5. Edit the settings to change the behavior of the program during a call.
Please refer to the Salesforce documentation for more details on these options.

On Inbound Calls

Upon receiving a call, iLink for Cisco will read the caller ID information, if present, and will pass the details to Salesforce to handle according to the behaviors configured above.

For Outgoing Calls

When placing a call, iLink for Cisco does not open a contact record. When the number is clicked within Salesforce, iLink for Cisco will use that information to locate the contact record and add an activity report to the database with the call details.

Click-to-Dial 📞

The Click-to-Dial feature is active within Salesforce. Any contact telephone numbers the plug-in finds will have the click-to-
dial icon placed beside them for quick and easy dialing.

Calling from Chatter

From the Chatter tab within Salesforce, contacts that you are following are displayed. Moving the mouse over a contact's name pops up the Hovercard. If a telephone number is present on the Hovercard, the Click-to-Dial feature will be available for that number too. Click the program icon to place the call.
Creating a Filter

Salesforce provides the ability to collect similar items together for easier processing. To find all of the calls received from unknown contacts, build a filter that will search the database looking for the name “-” (hyphen), which iLink for Cisco adds as the default when receiving unidentifiable calls.

To create a filter:

1. Open Salesforce and go to the **Contacts** tab.
2. Click **Create New View**.
3. Give the filter a name. Choose to search all contacts.

   Set **First Name equals** the hyphen character `-`.

   The remaining fields can be left at their default values.

4. Click **Save**.
Run the filter when necessary to see a list of all calls received from contacts whose details could not be matched with an entry in the database.
Salesforce Lightning Integration

Esna iLink Pro can be installed as a plug-in to the Salesforce CRM program. This provides users with contact, presence, and call management functions directly within Salesforce.

**Note:** Esna iLink Pro provides support for both the Salesforce Classic view and the Lightning user interface. This chapter is for users of the Salesforce Lightning interface.

**Caution:** Salesforce and Esna iLink Pro must both be installed and operating correctly before proceeding.

Call Center Definition File

The following file must be imported into Salesforce to setup the integration. Use any text editor (e.g. Notepad) to create the file. When ready, save it in the XML format.

**Hint:** Copy the text and paste it into Notepad, then save it with the TXT format. Then, in Windows, rename the file, replacing the TXT extension with XML. For example, rename `FILENAME.TXT` to `FILENAME.XML`.

```xml
<callCenter>
    <section sortOrder="0" name="reqGeneralInfo" label="General Information">
        <item sortOrder="0" name="reqInternalName" label="InternalName">iLinkCTI110</item>
        <item sortOrder="1" name="reqDisplayName" label="Display Name">iLink Call Center Adapter v.11.0</item>
        <item sortOrder="2" name="reqAdapterUrl" label="CTI Adapter URL">https://manage1.esna.com/sfcti/cti.bridge.v2.html</item>
        <item sortOrder="3" name="reqUseApi" label="Use CTI API">true</item>
        <item sortOrder="4" name="reqSoftphoneHeight" label="Softphone Height">500</item>
        <item sortOrder="5" name="reqSoftphoneWidth" label="Softphone Width">250</item>
        <item sortOrder="6" name="reqSalesforceCompatibilityMode" label="Salesforce Compatibility Mode">Classic_and_Lightning</item>
    </section>

    <section sortOrder="1" name="reqDialingOptions" label="Dialing Options">
        <item sortOrder="0" name="reqOutsidePrefix" label="Outside Prefix"></item>
        <item sortOrder="1" name="reqLongDistPrefix" label="Long Distance Prefix"></item>
        <item sortOrder="2" name="reqInternationalPrefix" label="International Prefix"></item>
    </section>

    <section sortOrder="2" name="CallResults" label="Call Results">
        <item sortOrder="0" name="Results" label="Result codes (comma separated list)"></item>
    </section>

    <section sortOrder="3" name="Matching" label="Phone matching options">
        <item sortOrder="0" name="SearchTemplates" label="Search templates (comma separated list)"></item>
        <item sortOrder="1" name="FormatTemplates" label="Format templates (comma separated list)"></item>
    </section>

    <section sortOrder="4" name="Experimental" label="Experimental options">
        <item sortOrder="0" name="ActivitySubtype" label="Apply activity subtype"></item>
    </section>

</callCenter>

Open CTI Integration

**Note:** By default, Chrome and IE will block pop-ups while browsing. Esna iLink Pro, when used as a plug-in with Salesforce, requires pop-ups to access advanced searches to identify incoming callers and access records. To ensure complete functionality, enable pop-ups when using the Salesforce plug-in.

Adding the Esna iLink Pro plug-in to Salesforce requires the server to be configured for OpenCTI integration. This configuration is performed by the administrator before the plug-in will work correctly for clients.

Follow these steps to ensure the proper integration of Salesforce with Esna iLink Pro.

**Warning:** OpenCTI integration with Esna iLink Pro is only possible with Salesforce version 13+.

**Warning:** The required Call Center adapter for Salesforce is only available with the Enterprise edition and higher.

1. If you have not done so already, create the Call Center Definition XML File as outlined on page 56.
2. Login to Salesforce Lightning using an account with site administrator credentials.
3. Click the *Setup* icon, and choose *Setup Home* from the dropdown list.
4. Go to *Platform Tools > Feature Settings > Service > Call Center > Call Centers*. Click *Import*.
5. Click **Choose File**, and select the Call Center Definition file created in step 1. With that file selected, click **Import**.

6. Returning to the **All Call Centers** window, click the newly created Call Center.
7. Click **Manage Call Center Users** to add clients to the new call center.

8. Click **Add More Users**.
9. Add all of the required users to the list. When finished, click **Add to Call Center**.

![Image of iLink Call Center Adapter](https://example.com/image.png)

10. **Integration is complete.**

Clients must now go to the Chrome web store ([https://chrome.google.com/webstore](https://chrome.google.com/webstore)) to download the Esna iLink Pro plug-in. Once installed, the client will have UC functionality available within Salesforce.

![Image of Salesforce interface](https://example.com/image.png)

**Using Salesforce**

When using the Salesforce plug-in with iLink Pro, the interface works in the same fashion as it does when installed into a browser with the following additional integrations.

**Inbound and Outbound Calling**

When iLink Pro places or receives telephone calls, the program performs several functions within Salesforce to improve work flow. Instant access to contact records, and automatically creating activity log entries improves the usability of the plug-in.
Configuring Call Behavior

When receiving a telephone call, iLink Pro will extract the caller ID, if present, and pass this information to Salesforce. Settings made within Salesforce determine whether a pop-up is seen, if the matching client record is opened automatically, or if nothing at all occurs. This behavior can be changed by the administrator.

1. Login to Salesforce Lightning using an account with site administrator credentials.
2. Click the Setup icon, and select Setup Home from the dropdown list.
3. Go to Platform Tools > Feature Settings > Service > Call Center > SoftPhone Layouts.
4. Select a layout and click Edit.
5. Under the dropdown menu for Select Call Type, choose Inbound, Outbound, or Internal.

6. Edit the settings to change the behavior of the program during a call. Please refer to the Salesforce documentation for more details on these options.

On Inbound Calls

Upon receiving a call, iLink Pro will read the caller ID information, if present, and will pass the details to Salesforce to handle according to the behaviors configured above.

For Outgoing Calls

When placing a call, iLink Pro does not open a contact record. When the number is clicked within Salesforce, iLink Pro will use that information to locate the contact record and add an activity report to the database with the call details.
Click-to-Dial ☎️

The Click-to-Dial feature is active within Salesforce. Any contact telephone numbers the plug-in finds will have the click-to-dial icon 📞 placed beside them for quick and easy dialing.

Click the icon or the number to place a telephone call to that contact using your currently selected telephone device.

Calling from Chatter

From the Chatter tab within Salesforce, contacts that you are following are displayed. Moving the mouse over a contact’s name pops up the Hovercard. If a telephone number is present on the Hovercard, the Click-to-Dial feature will be available for that number too. Click the program icon to place the call.
Creating a Filter

Salesforce provides the ability to collect similar items together for easier processing.

Hint: To find all of the calls received from unknown contacts, build a filter that will search the database looking for the name - (hyphen), which iLink Pro adds as the default when receiving unidentifiable calls.

To create a filter:

1. Open Salesforce and go to the Contacts tab.
2. Under the List View Controls icon, select New.
3. On the New List View window, give the filter a name. Select which people can access this filter. When ready, click Save.
4. Click **Add Filter**.

5. Choose **Show me All Contacts**.
   Set the **Field** and **Operator** entries to specify where to search and the logic to apply. Enter the string to search for in the **Value** field.
   Click **Done**.

6. Click **Save**. The filter will be created, and then applied to the contact list.

Run the filter when necessary to see a list contacts specified. Click the current view name on the Contacts tab and select
a filter from those available.
APPENDIX A: CONFIGURING SITE PROFILE

Introduction

**Warning:** The contents of this document are intended for advanced users only.

The Zang Inc. licensing engine enables provisioning of application settings on a per customer domain basis. This is termed the **Site Profile**. Once the parameters have been applied to a site, they are picked up by the client application at the next login.

The site profile is defined as a JSON object. The parameters that are available depend upon the application. Not all applications are supported.

**Hint:** Please be aware that the settings names are case sensitive.

Configuring the Site Profile

The site profile is created and modified from the [accounts.zang.io](http://accounts.zang.io) website. Profile changes are specific to each product; changes to one application will not affect another.

1. Open a web browser and go to [accounts.zang.io](http://accounts.zang.io). Login using administrator credentials.
2. From the dashboard, select **Manage Companies** from the left-hand pane. Click on the company (or use the Edit button) you wish to modify the profile for. If necessary, use the search field to locate the company.

3. On the **Company Profile** page, open the **Apps** tab. Click **iLink Pro**.

4. Make the necessary changes to the script in the window. Refer to the **Programming Commands** section of this manual for complete details.
5. When all of the changes have been made, click **Save**.

The next time a user logs into the application, the new profile settings will be used.
Programming Commands

The parameters available are specific to the application that they are to be applied to.

Parameters

Settings Object

<table>
<thead>
<tr>
<th>NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>iLinkServer</td>
<td>String. Default iLink server name, in form server.domain.com.</td>
</tr>
<tr>
<td>Profiles</td>
<td>Array of connection profiles, each element in array represents and entry presented to the user in case if organization has multiple servers user might connect to.</td>
</tr>
</tbody>
</table>

Profile Object

<table>
<thead>
<tr>
<th>NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>String. Unique profile identifier.</td>
</tr>
<tr>
<td>Label</td>
<td>String. Profile name presented to the user.</td>
</tr>
<tr>
<td>iLinkServer</td>
<td>String. ILink server name, in form server.domain.com</td>
</tr>
</tbody>
</table>

Example

```
{ "iLinkServer": "user.esna.com", "Profiles": [{ "Label": "Test profile", "Id": "T1", "iLinkServer": "user0.esna.com" }, { "Id": "T2", "Label": "Test profile #2", "iLinkServer": "user1.esna.com" }] }
```

This set of settings defines 3 profiles:

- Default (iLinkServer defined in settings object) – user.esna.com
- Test profile – user0.esna.com
- Test profile #2 – user1.esna.com

User will also be presented with User defined profile setting – that is the way for the user to alter predefined settings. Profile id selection is kept in user profile, so next time user logs in, it will be used profile that was previously selected. Behavior described here could be changed in future product versions.