

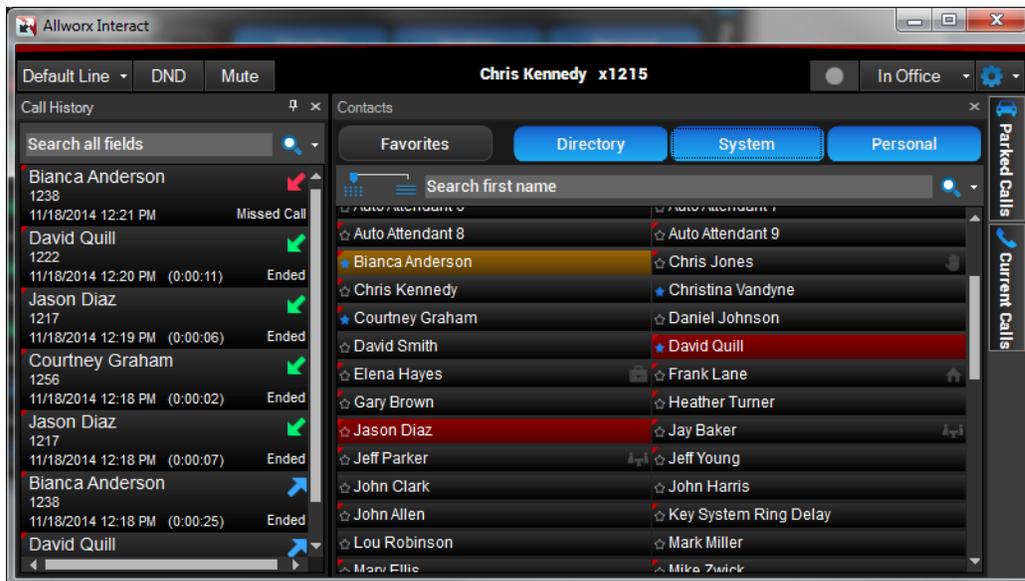
**Allworx[®] Interact and
Interact Professional User Guide**

Version 1.1

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Allworx[®] Interact and Interact Professional User Guide



Version 1.1



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1 Introduction

The Allworx Interact application enables users to control a handset with convenient access to call history and contacts from the Allworx directory. The Allworx Interact application also accesses personal directory contacts from the user's Microsoft® Outlook® application. The Allworx Interact application requires Allworx server software 7.5 or later.

- **Allworx Interact** - a free edition of the application is available to all Allworx users and enables users to Answer, Ignore, End, or place calls on Hold.
- **Allworx Interact Professional** - a licensed edition of the application that offers all of the Interact version features as well as Transfer, Park, Conference, and settings features. Contact the Allworx Server Administrator for an Allworx Interact Professional license (see the Allworx Server System Administrator's Guide).

Both Allworx Interact editions provide a user centric view of the Allworx business directory. Therefore, a user can place a call to another directory contact with multiple handsets without selecting an individual handset. The application works in conjunction with any Allworx handset and does not disconnect the call.

In either edition, the Allworx Interact application does not provide voicemail support such as voicemail indicators or the ability to retrieve a voicemail message.

1.1 Who Should Read This Guide

Allworx users that use the Allworx phone system and use the Allworx Interact Professional application should read this guide.

1.2 Guide Purpose

The purpose this guide is to advise users on the installation, set up, and operation of the Allworx Interact and Allworx Interact Professional application.

1.3 Equipment Requirements

The table below indicates a list of all equipment and requirements necessary to perform all

operations identified in this chapter.

Equipment	Requirements
PC	<ul style="list-style-type: none"> • Running OS described below: <ul style="list-style-type: none"> • Windows® XP 32-bit SP3 • Windows XP 64-bit SP2 • Windows 7 32-bit SP1 • Windows 7 64-bit SP1 • Windows 8 32-bit • Windows 8 64-bit • Windows 8.1 32-bit • Windows 8.1 64-bit • RAM minimum: 2 GB • Monitor resolution: 1024 x 768 (XGA) • Allworx Interact Professional application • Internet connection
Allworx server	<ul style="list-style-type: none"> • Allworx Server Software Version 7.5.9.4 (minimum) • IP Address or DNS name Allworx server • Allworx username and password
Allworx phone	

2 Setup

This chapter describes:

- installing the Allworx Interact and Interact Professional application.
- logging in to the Allworx Interact and Interact Professional application.
- changing the log in password for the Allworx Interact and Interact Professional application.

2.1 Objective

Upon completing the setup instructions, Allworx users that use Allworx phone systems can successfully:

- install the Allworx Interact or Allworx Interact Professional application.
- log in to the Allworx Interact or Allworx Interact Professional application.
- change the log in password.

2.2 Equipment Requirements

The table below indicates a list of all equipment and requirements necessary to perform all operations identified in this chapter.

Equipment	Requirements
PC	<ul style="list-style-type: none">• Running OS described in “Equipment Requirements” on page 1.• RAM minimum: 2 GB• 37 MB of available hard-disk space• Monitor resolution: 1024 x 768 (XGA) - minimum• Allworx Interact or Allworx Interact Professional application• Internet connection
Allworx server	<ul style="list-style-type: none">• Allworx Server Software Version 7.5.9.4 (minimum)• IP Address or DNS name Allworx server• Allworx username and password

2.3 Installation

Installing the Allworx Interact application requires Microsoft .NET Framework version 4.0 for operating systems Windows 7.0 and earlier.

The Allworx Interact application supports Terminal Services/Remote Desktop Services on Windows Server 2008, Windows Server 2008 R2, Windows Server 2012, and Windows Server 2012 R2 using the Enterprise installer. The Enterprise installer also supports deployment through Group Policy Objects.

To install the Allworx Interact Application:

1. Navigate to <http://get.allworx.com/interact/> for the downloadable version of the application.
2. Double-click the download installer. The Allworx Interact Setup Wizard dialog box opens. Click **Next** to proceed.
3. Accept the End-User License Agreement, and click **Next**.
4. Configure the application short cuts by checking the box.
 - Desktop: places a start up icon on the computer desktop. User double-clicks to activate application.
 - **Startup folder:** log in to the computer, and Allworx Interact automatically initiates.
5. Click **Next**. The Ready to Install dialog box opens. Click **Install** to begin.
6. Click the Launch Interact checkbox, and then click **Finish** to launch the application.

2.4 Log in

1. Launch the Allworx Interact application.
2. Enter the Allworx username and password. Enter the Allworx Server IP address. If the IP address is unknown, click the **Find Server IP** button.

Microsoft Windows XP operating system users with limited privileges that click the Find Server IP button, may experience a firewall exception, and the user receives an error message. Click **OK** to close the Windows Security Alert dialog window.

To add the Allworx Server IP, select an option:

- Ask the Network/System Administrator responsible for client PCs on the network the IP address of the server, and enter the IP address manually.
 - Ask the Allworx Server Administrator to add a firewall exception on the workstation for the Allworx Interact application.
3. Click **Login**.
 - **Allworx Interact**: The application icon is visible in the Windows System tray.
 - **Allworx Interact Professional**: The application opens.

If an update is available, click **Yes** to update the Allworx Interact application or click **No** to continue.

If a user has multiple assigned handsets, the user sees a Handset Selection dialog box. Click the drop-down arrow to select an available phone from the list. Click **OK** to continue to log into the server.

If the Allworx server software requires a password change, the Allworx Interact application prompts the user to change the current password after the initial log in.

4. Download the supporting documentation from <http://get.allworx.com/Interact>.
5. Place a test phone call. See “Manage Calls” on page 25 for more information.

2.5 Change the Login Password

This feature is only available with server software 7.7 and later.

To change the login password:

Users can initiate a request to change the client login password, and must supply both old and new passwords during the request. The new password must match the Allworx Server requirements.

1. Log in the Allworx Interact Professional application.
2. Locate and click the Allworx Interact Icon in the Windows System Tray or the application settings menu, and then select **Change Password...** in the drop-down menu.
3. Enter the required information, and then click **OK**. A notification displays indicating the request was successful. Click **OK** to return to the application.



3 Overview

The Allworx Interact edition does not use valuable computer screen space. If there is an incoming call, the user sees a small pop-up box open in the lower, right corner of the computer screen and can click **Answer** to accept the call or **Ignore** to stop the ringing of the incoming call and dismiss the dialog.

The Allworx Interact Professional application enables users to view one or all windows. Each window has specific information:

- **Call History** provides the previous call information such as Caller ID name/number, date and time of call, and call status.
- **Contacts** provides both Allworx directory contacts and personal directory contacts from the user's Microsoft Outlook application.
- **Parked Calls** provides a view of the calls in the Parking Orbit. Click the Slide-to-Hide window tab to view or hide the window.
- **Current Calls** provides a view of the active calls. Click the Slide-to-Hide window tab to view or hide the window.
- **DialPad** enables the user to dial numbers from the PC. Click the Slide-to-Hide window tab to view or hide the window.

3.1 Objective

Upon completing the overview, Allworx Interact and Allworx Interact Professional users can understand the Allworx Interact Professional application:

- system tray options.
- layout.
- icons.
- window pins.
- window docking and undocking.
- wiping current remote licenses

3.2 Equipment Requirements

The table below indicates a list of all equipment and requirements necessary to perform all operations identified in this chapter.

Equipment	Requirements
PC	<ul style="list-style-type: none"> • Running OS described in “Equipment Requirements” on page 1. • RAM minimum: 2 GB • 37 MB of available hard-disk space • Monitor resolution: 1024 x 768 (XGA) - minimum • Allworx Interact or Allworx Interact Professional application • Internet connection
Allworx server	<ul style="list-style-type: none"> • Allworx Server Software Version 7.5.9.4 (minimum) • IP Address or DNS name Allworx server • Allworx username and password

3.3 System Tray

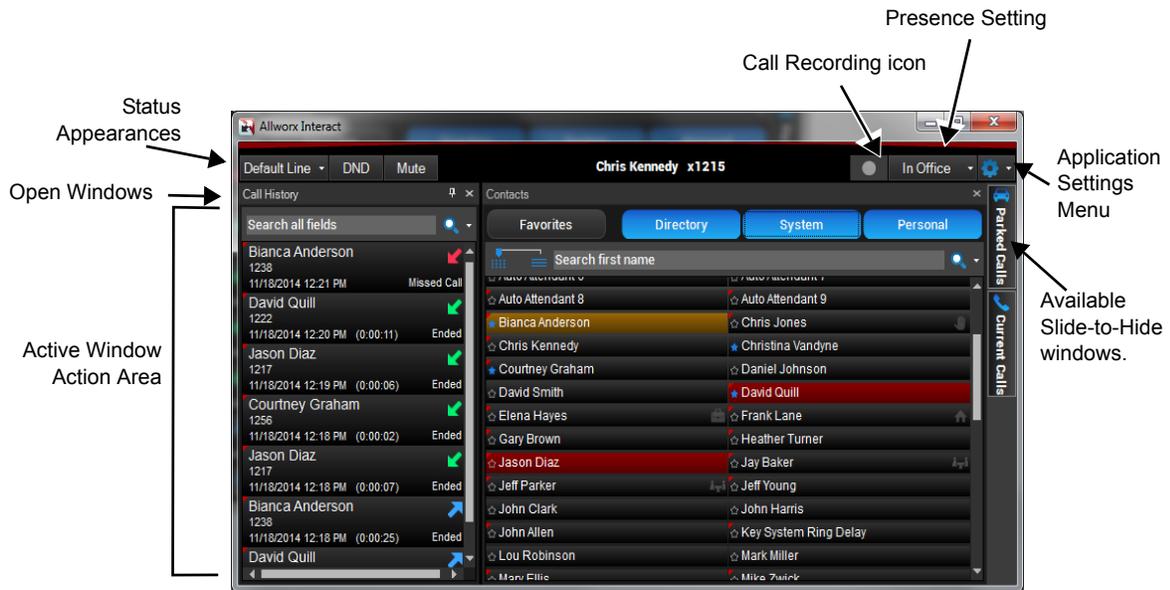
In both Allworx Interact editions, click the windows system tray (lower right corner). See “Settings” on page 16 for more detailed information about each option.

- Show Active Call window or Hide Active Call window
- **Update** (only displays if a software update is available)
- Settings
- **Find out more...**
- **About...**
- **Change password...**
- **Logout <username>...**
- **Exit**

3.4 Layout

The Allworx Interact Professional edition offers six windows. Users can undock/dock each window and pin/unpin the slide-to-hide windows. Additionally, users can resize each window within the main application screen.

3.4.1 Main Screen



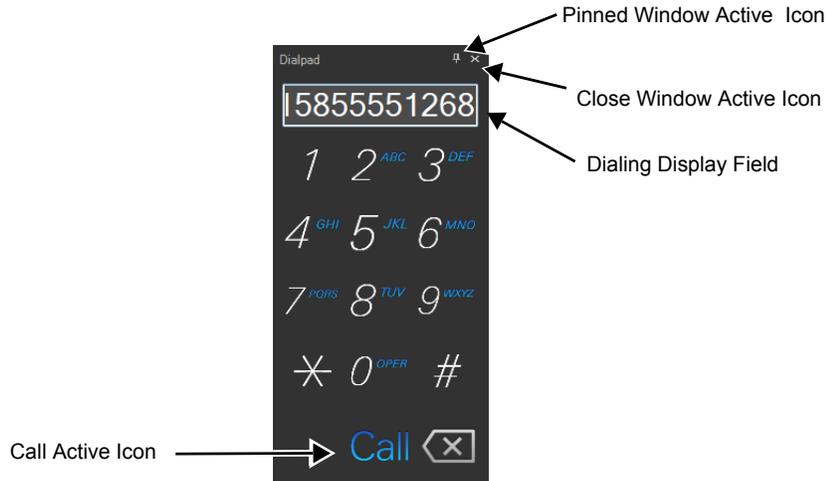
3.4.2 Dialpad Window

Use the Allworx Interact Professional application dialpad to place a phone call instead of using the phone dialpad.

To place a call using the dialpad window:

1. Open the Dialpad window.
2. Select a dial option:
 - Dial the internal extension.
 - Follow the dial plan for an external number.
 - Right-click on the dialpad entry field and select one of the drop-down options.

3. Click the **Call** active call icon to place the call.



3.5 Icons

In the Allworx Interact Professional edition, the status icons and active icons are applicable to Allworx directory contacts only.

- **Status Icons** - provide a visual cue of contact type and availability.
- **Active Icons** - enable actions without going into the settings menu or using the phone. Click the icon to activate.

Table 1: Status Icons

	Business contact.		Presence icon - At A Meeting.
	Contact favorite.		Presence icon - On Vacation.
	Outgoing phone call.		Presence icon - On Business Trip.
	Incoming, unanswered phone call.		Presence icon - At Home.
	Incoming, answered phone call.		Presence icon - Away.
	Presence icon - Busy.		Presence icon - Unknown.

Table 2: Active Icons

	Place a phone call. Click twice to redial the last number.		Begin Call Recording.
--	------------------------------------------------------------	--	-----------------------

Table 2: Active Icons

	Dialpad backspace		Pause Call Recording.
	Close window within the application. See “Settings” on page 16 to reactivate window.		Resume Call Recording.
	Unpinned window. Window is available for Slide-to-Hide option.		End Call Recording.
	Pinned window. Window is available for undocking.		

3.6 Window Pins

In the Allworx Interact Professional edition, clicking the Pin active icon for the Current Calls, Parked Calls, and Dialpad windows keeps that window open while docked in the application window.

3.7 Windows Dock/Undock

The Allworx Interact Professional edition enables users to double-click or click and drag the window title bar of each application window to undock it from the main application window. This enables customization of the size and placement of each application window on the computer screen. Users must Pin open the Current Calls, Parked Calls, and Dialpad windows prior to undocking the window, see “Window Pins” on page 11.

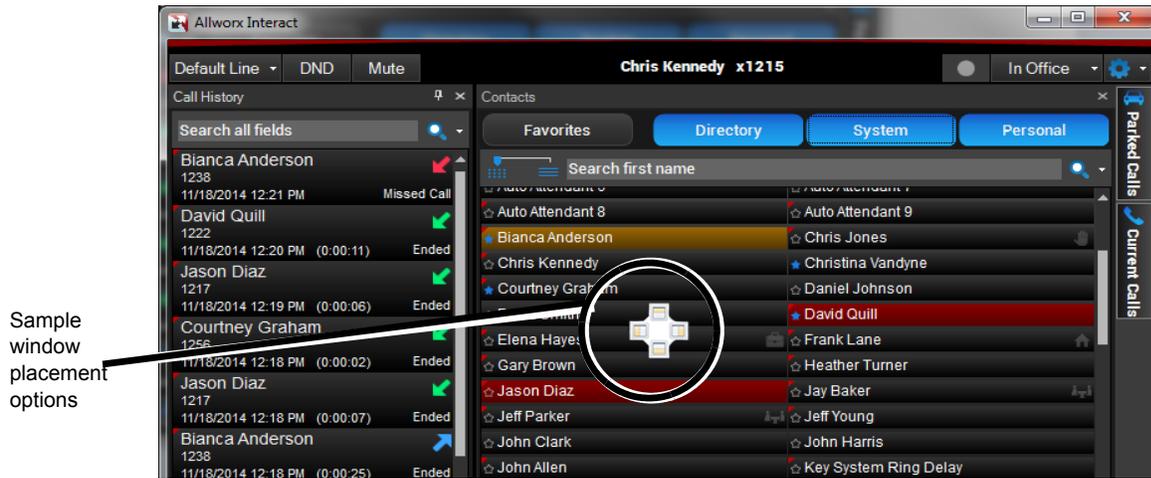
The undocked windows close when exiting the Allworx Interact Professional application and open in the same location when relaunching the application. Additionally, while undocked, users can move each window to a new screen location or close each window.

To dock (return) the individual window back to the application window, double-click the window title bar or click and drag the window back to the main application window, and then drag the window to one of the placement targets shown on the screen. The placement area highlights indicating placement of window, see “Figure 1: Window Return Placement” on page 12.

Shortcut: To return the undocked window to the original, docked position, double-click the undocked window title bar.

Users can minimize the Allworx Interact Professional main and undocked windows independently. Undocked windows are independent and placed on top or under the main menu window in the Allworx Interact Professional application, and other maximized applications can obscure the view.

Figure 1: Window Return Placement



3.8 Wipe Current Remote Licenses

With server software 7.7 and later, the Allworx Server Administrator can send a wipe command to a lost or stolen device, which removes all log in credentials, configuration and backup configuration settings, and recording files in both the default and current recording directories. The command requires the Allworx server administrator to change the user password, which terminates the Allworx Interact application.

To use the device after receiving a wipe command, log in to the device using the current credentials and the new password provided by the Allworx server administrator. See [“Log in” on page 4](#) for more information.

4 Status Appearances

The Allworx Interact Professional application status area displays the active application windows; the Station Appearances, DND, and Mute buttons; the username and extension; call recording action icon; the user presence; and the Settings button.

4.1 Objective

Upon completing the status appearances instructions, Allworx Interact and Allworx Interact Professional users can manage the status appearances options:

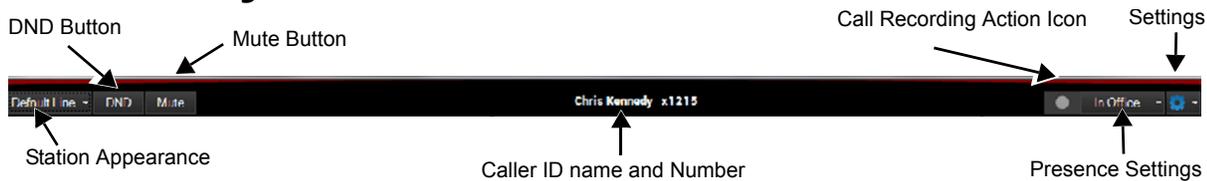
- layout.
- station appearance.
- do not disturb (DND).
- mute.
- call recording.
- presence
- application settings.

4.2 Equipment Requirements

The table below indicates a list of all equipment and requirements necessary to perform all operations identified in this chapter.

Equipment	Requirements
PC	<ul style="list-style-type: none"> • Running OS described in "Equipment Requirements" on page 1. • RAM minimum: 2 GB • 37 MB of available hard-disk space • Monitor resolution: 1024 x 768 (XGA) - minimum • Allworx Interact or Allworx Interact Professional application • Internet connection
Allworx server	<ul style="list-style-type: none"> • Allworx Server Software Version 7.5.9.4 (minimum) • IP Address or DNS name Allworx server • Allworx username and password

4.3 Layout



4.4 Station Appearance

Note:	Upon placing the call, the Station Appearance resets to the default appearance.
--------------	---------------------------------------------------------------------------------

To select the call type for the outbound call:

- Click the drop-down arrow. The list of available options display. Select the option to use. The option stays active until a different option is selected.
 - Default Line** - use this option to place an internal or external phone call.
 - Intercom** - use this option to place an intercom call to Allworx directory contacts only. Users can also select for a standard call appearance to dial an outside line.
 - Shared Call Appearance** - used for a specific shared call appearance line.
 - Any other available line appearance
- Place a call by using one of the following options:
 - open the application dialpad to dial the number.
 - use the phone dialpad.
 - double-click a listing in the Contacts Window.
 - double-click a listing in the Call History Window.
- Use the Allworx Interact Professional features, as necessary, and begin talking using the designated Allworx handset. Click **End Call** when finished.

4.5 DND (Do not Disturb)

When activating the DND feature, the phone does not ring. All calls follow the next step in the active call route. Users can place calls from the application or phone.

To activate the DND option, click the **DND** button. The button changes to blue to indicate it is active. Click the **DND** button again. The button changes to black to indicate it is inactive. Users can activate the DND option during an active call. Doing so activates the feature for subsequent incoming calls.

4.6 Mute

When activating the Mute feature on an active call, the user at the other end of the call does not hear the conversation.

To activate the Mute option, click the **Mute** button. The button changes to blue to indicate it is active. To deactivate the mute option, click the **Mute** button again. The button changes to black to indicate it is inactive.

4.7 Call Recording

If available, the Interact Professional application enables users to start, pause, resume, or stop the call recording of the current, active call (including conference calls) as well as provides a status indicator showing that the recording is active or paused. Additionally, the Interact Professional application:

- Pauses the call recording automatically when placing a call on hold, and stops the recording when parking or transferring a call, or ending a call.
- Resumes the call recording automatically when resuming the call.
- Pause and resume the call recording manually of any active call.
- Stops the call recording when using a Shared Call Appearance to place the call on a public or bridged hold.
- Private hold requests work the same as a regular appearance, if the appearance is a shared call appearance.
- Inserts a beep/tone into the recording as a marker and displays the recording flag when resuming a previously paused recording.

To change the Call Recording File Location or Volume, see “Settings” on page 16 for more information.

To record an active call:

Option	Description
	Begins recording the conversation.
Start Recording	To start the recording, select an option: <ul style="list-style-type: none"> • Click the action icon in the Device Status area. • Navigate to Current Calls > More > Start Recording.
Pause Recording	Temporarily stops the recording. The icon changes to the Resume Recording action icon, and the Allworx Interact Professional application interrupts recording the conversation.
	To pause the recording, click the action icon in the Device Status area.

Option	Description
Resume Recording	<p>Restarts recording the conversation. The icon changes to the Pause Recording action icon, and the Allworx Interact Professional application starts recording the conversation.</p> <p>To resume the recording, click the action icon in the Device Status area.</p>
Stop Recording	<p>Ends the recording, and the Allworx Interact Professional application saves the file.</p> <p>To stop the recording, select an option:</p> <ul style="list-style-type: none"> • Click the action icon in the Device Status area. • Navigate to Current Calls > More > Stop Recording.

4.8 Presence

The presence shows user availability status. A presence other than In Office displays an out of office icon. See “Icons” on page 10 To change the status, click the drop-down arrow next to the status word, and select an option from the drop-down list.

- In Office
- On Vacation
- At Home
- Busy
- At A Meeting
- On Business Trip
- Away

4.9 Settings

Enables customizing the application. Click the drop-down arrow to display the user settings of the application.

4.9.1 Visible Windows

Changes the current window view of the Allworx Interact Professional application. Options include: Contacts, Call History, Current Calls, Parked Calls, and Dialpad. Use this setting to open or close windows. When changing slide-to-hide windows to visible, pinned is the default behavior.

4.9.2 Show Active Call Window or Hide Active Call Window

Selecting this option displays or hides the incoming, active call pop-up window, respectively.

4.9.3 Update Application

Selecting this option requires the application to manually request an upgrades the server, if available.

4.9.4 Settings

Enables adjusting the Call Notification, Contact Display, Recording, and External Program Link settings After updating the settings, click **OK** to save the changes. See “Settings” on page 19 for more information.

4.9.5 Find out more...

Selecting this option links to the Interact Upgrade Options page.

4.9.6 About...

Selecting this option identifies the application version level, copyright, and support contact information.

4.9.7 Change password...

Selecting this option enables the user to update the current password. See “Change the Login Password” on page 5 for more information. Requires server software 7.7 and later.

4.9.8 Logout

Selecting this option signs the user out of the application; enables a new user to log in the application.

4.9.9 Exit

Selecting this option closes the application.



5 Settings

The **Options...** setting provides multiple tabs for each licensed tool as well as the free version to display the available options to change.

- Click **Apply** to see the new settings without closing the Settings window.
- Click **OK** to save all changes or **Cancel** to ignore the changes. All changed settings persist across application starts (either restart or application upgrade).

Users can continue to answer incoming calls or end current calls using the active call pop-up. **Reset UI configuration** - resets the application display settings to the factory defaults. Click **OK** to accept the reset request.

5.1 Objective

Upon completing the settings instructions, Allworx Interact and Allworx Interact Professional users can manage the settings for:

- call notifications.
- contact display settings.
- recording.
- external program link.

5.2 Equipment Requirements

The table below indicates a list of all equipment and requirements necessary to perform all operations identified in this chapter.

Equipment	Requirements
PC	<ul style="list-style-type: none"> • Running OS described in "Equipment Requirements" on page 1. • RAM minimum: 2 GB • 37 MB of available hard-disk space • Monitor resolution: 1024 x 768 (XGA) - minimum • Allworx Interact or Allworx Interact Professional application • Internet connection
Allworx server	<ul style="list-style-type: none"> • Allworx Server Software Version 7.5.9.4 (minimum) • IP Address or DNS name Allworx server • Allworx username and password

5.3 Call Notifications

Enables users to adjust application preferences when receiving an incoming call.

Feature	Description
Location	Position of the pop-up notification window on the computer screen. Options: <ul style="list-style-type: none"> • Lower Right (Default) • Center • Upper Left • Upper Right • Lower Left
Opacity	Slider bar adjusts the pop-up notification window transparency.
Duration	Indicates the length of time the pop-up notification window displays. Options: <ul style="list-style-type: none"> • Active calls - stays open for the entire length of the active call. • Timed - select amount of time in seconds. (Default is 10 seconds)
Ring Animation	Behavior of the BLF appearance during an incoming call in the Contacts window. Options: <ul style="list-style-type: none"> • Flash (Default) • Pulse • None

5.4 Contact Display Settings

Enables users to adjust how the contacts display on the screen.

Feature	Description
Settings to edit	Selects which viewing screen to apply the changes. Use the slider bar to select the screen.
Cell size	Adjust the cell height and width. Options: <ul style="list-style-type: none"> • Multi-line • Single line • Minimum width (enter a number between 40 and 1000)
Split contacts into indexed sections	Add index information to sections of contacts. <ul style="list-style-type: none"> • Check box to enable. • Adjust slider bars for Section size and Section Heading size.
Spacing between cells	Adjust the distance between contact listings. <ul style="list-style-type: none"> • Horizontal (enter a number between 1 and 20) • Vertical (enter a number between 1 and 20)
Font size	Use the slider bar to adjust the text size.

5.5 Recording

Enables users to identify the storage folder and volume of the recordings.

Feature	Description
Folder to store recordings in	The folder to store the recordings displays. To change the folder location, click Browse... and navigate to the new location. Click OK to set the new destination.
Record volume	Use the slider bar to adjust the volume of the recording. Left for a quieter recording, right for a louder recording.

5.6 External Program Link

Tie the Allworx phone into a business work flow. Specify an action for the Allworx Interact Professional software to perform whenever certain phone system events occur.

1. Launch the Allworx Interact 1.1 Professional application. Navigate to **Settings > Options > External Program Link**.
2. Update or verify the remaining options with the External Program Link feature.
3. Select **Apply**, and then **OK** to save the changes.

Feature	Description
	Enter the URL or command line executable.
Command to execute	<ul style="list-style-type: none"> • Automatically appends CALLNUM to the end of an API string with no macros. • Only inserts COMPANY when the CALLNUM finds a matching contact in the personal contacts and the matching contact has a company assigned. • Only inserts DNISNUM and DNISNAME when values are available, otherwise the application inserts a blank.
Macros	Shortcuts to include in the command line executable. Options: Click the drop-down arrow and select an option. Click Insert to add to the Command to execute section. Options include: <ul style="list-style-type: none"> • %CALLNUM% (phone number of the caller) • %CALLNAME% (name of the caller) • %DNISNUM% (DNIS number of the caller) • %DNISNAME% (DNIS name of the caller) • %COMPANY% (company name of the caller)

Feature	Description
Type of command	Select the command type. Options: <ul style="list-style-type: none"> • URL - See “External Program Link - URL option” on page 22 for more information. • CMD shell - See “External Program Link - CMD Shell option” on page 23 for more information.
Prepend home area code to local numbers.	Enter the home area code.
Strip the external dialing prefix from all phone numbers.	Check to select, uncheck to deselect.
would load the following URL	Display a sample URL based on the information provided in the Command to Execute section.
Test Command	Click to check for a valid command.
Various execution requirements	Check the box to enable or uncheck the box to disable the requirement when performing the command. Options: <ul style="list-style-type: none"> • Execute on inbound calls • Execute on outbound calls • Only executive if a call is answered • Only execute if a caller is not in the contact list • Do not execute for internal calls
Recently executed commands	Displays the a list of performed commands.

5.6.1 External Program Link - URL option

1. Launch the third-party application in a separate browser window for the Allworx Interact 1.1 Professional application to use with the External Program Link feature. Perform an operation for the information containing one or more of the External Program Link macros in the Allworx Interact Professional application.
2. Highlight and copy the URL from the browser window. For example: Sales Force application Advanced Search using phone number. www.salesforce.com/search/SearchResults?searchType=2&str=5854210000&search=Search&sen=0.
3. Navigate to the Allworx Interact 1.1 Professional application and paste the URL in the **Command to execute** field by typing **Ctrl + v**.
4. Substitute the macro information (phone number in this example) by highlighting the information within the pasted URL, locate the Macros line, and click the drop-down arrow to select the correct macro key. Click **Insert** to replace the highlighted portion of the URL with the macro.

5. Repeat step 4 for each additional macro substitution within the same URL.

5.6.2 External Program Link - CMD Shell option

1. Set the home area code in Interact.
2. Enter the following command shell script. The examples below use “C:\Program Files\CMS\CMSSCREENPOP.EXE” as an example of the executable command file.
 - a. For a completely automated screen pop:

```
C:\Program Files\CMS\CMSSCREENPOP.EXE /PHONE:"%CALLNUM%" /LOGIN:<username>  
/PASSWORD:<userspassword> /LAUNCH
```

- b. For a partially automated screen pop.:

```
C:\Program Files\CMS\CMSSCREENPOP.EXE /PHONE:"%CALLNUM%" /LOGIN:<username>  
/PASSWORD:<userspassword>
```



6 Manage Calls

Note: To avoid dropping a call, configure the Allworx handset by navigating to **CONFIG > Preferences > Auto On Hold**. Select **Enabled** and exit the menu. When prompted to Save to Flash, press the Yes soft key.

This chapter describes managing phone calls using the Allworx Interact and Allworx Interact Professional application.

6.1 Objective

Upon completing the manage calls instructions, Allworx Interact and Allworx Interact Professional users can understand how to:

- place a call.
- place an intercom call.
- answer a call.
- end a call.

6.2 Equipment Requirements

The table below indicates a list of all equipment and requirements necessary to perform all operations identified in this chapter.

Equipment	Requirements
PC	<ul style="list-style-type: none"> • Running OS described in "Equipment Requirements" on page 1. • RAM minimum: 2 GB • 37 MB of available hard-disk space • Monitor resolution: 1024 x 768 (XGA) - minimum • Allworx Interact or Allworx Interact Professional application • Internet connection
Allworx server	<ul style="list-style-type: none"> • Allworx Server Software Version 7.5.9.4 (minimum) • IP Address or DNS name Allworx server • Allworx username and password
Allworx phone	

6.3 Place a Call

To place a call using the Allworx Interact Edition:

Use the handset to dial a call. The application displays a Cancel button to stop the call.

To place a call using the Dialpad window:

1. Open the Allworx Interact Professional Dialpad window, and dial the number.

To dial an external number, dial the outside line access digit set in the dial plan (usually 9 or 78 + Allworx pin code).

- Immediate line seizure example: 9# or 78 + pin code# > Call > phone number
- Call connect example: 9 <phone number> or 78 + pin code <phone number>

2. Click the **Call** active call icon to place the call. **Shortcut:** Double-click the **Call** action icon to redial the last number.

To place a call using the Call History or Contacts window:

Select a listing, and then select an option:

- Double-click the listing.
- Right-click the listing, and select **Dial** or **Intercom**.

6.4 Intercom Call

In Allworx server software 7.7 and higher, the Intercom displays if the Allworx phone supports the feature, but if the call appearance is currently in use, the Interact application hides the Intercom option when using the right-click menu. The application uses the Intercom appearance, if all other default call appearances are unavailable.

To place an Intercom call in the Allworx Interact Professional Edition - Option 1:

1. Open the Call History or the Contacts window, right-click the listing, and select **Intercom**.
2. Wait for the tone accompanied by a single ring. The Allworx handset on the receiving end automatically answers the call (default). Intercom calls to external phone numbers ring as a normal call. Begin speaking.

To place an Intercom call in the Allworx Interact Professional Edition - Option 2:

1. Locate the Station Appearance, click the Default Line drop-down arrow, and select **Intercom**.
2. Double-click a listing in the Contacts or Call History window or use the dial pad. Begin speaking.

6.5 Answer a Call

To answer a call in the Allworx Interact Edition:

For incoming calls, the application displays the caller ID name/number and the **Answer** and **Ignore** buttons. Click the preferred option:

- **Answer**: Displays in the current calls window, accepts the call.
- **Ignore**: Silences ringing and dismisses the dialog for that call.

To answer a call in the Allworx Interact Professional Edition:

For incoming calls, the current calls window opens and auto pins, unless the user already has the window pinned open. In this case, the incoming call displays in the Current Calls window, and the window does not close when the call ends. The listing displays the status icon/call details, caller ID name and number, and the **Answer** and **Ignore** buttons. Additionally, the Call Notification window displays. Click the preferred option:

- **Answer**: Displays in the current calls pane, accepts the call.
- **Ignore**: Silences ringing, but user can click the **Answer** button to retrieve the call.

6.6 End a Call

To end a call in the Allworx Interact Edition:

Click the **End Call** button in the Interact pop-up.

To end a call in the Allworx Interact Professional Edition:

Locate the Current Calls window, the current phone call, and then click **End Call**.



7 Current Calls Window

In the Allworx Interact Professional edition, the Current Calls window displays all the user’s active and on hold calls. Users hear the call through the phone speaker, a headset, or by picking up the phone handset. Users can close the Allworx Interact Professional application and not affect the current phone state such as disconnecting a current call.

Note:	To avoid dropping a call, configure the Allworx handset. On the handset, navigate to CONFIG > Preferences > Auto On Hold . Select Enabled and exit the menu.
--------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

7.1 Objective

Upon completing the current calls window instructions, Allworx Interact and Allworx Interact Professional users can manage the current calls by:

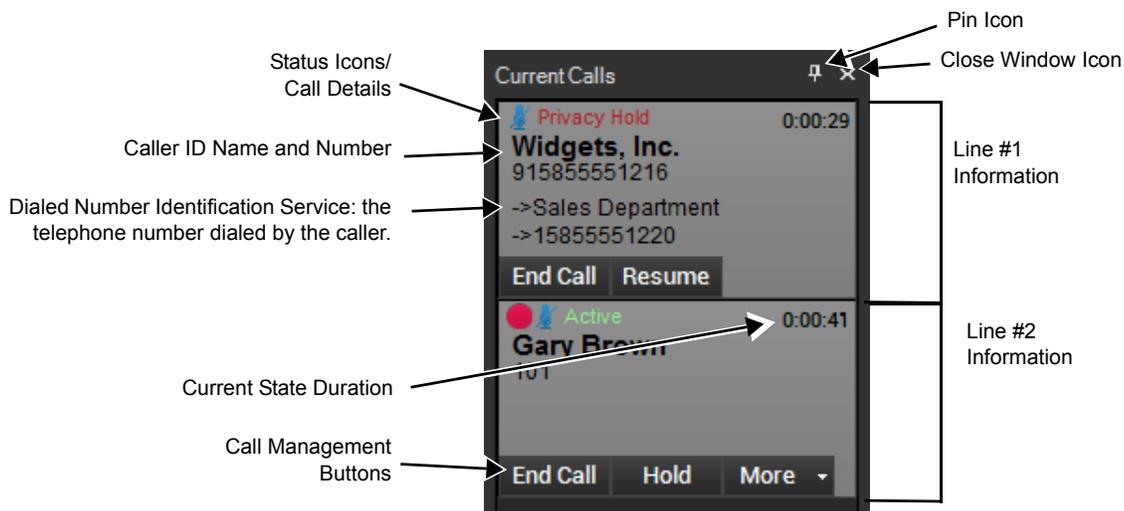
- placing a call on hold.
- transferring a call.
- parking a call.
- placing a conference call.

7.2 Equipment Requirements

The table below indicates a list of all equipment and requirements necessary to perform all operations identified in this chapter.

Equipment	Requirements
PC	<ul style="list-style-type: none"> • Running OS described in “Equipment Requirements” on page 1. • RAM minimum: 2 GB • 37 MB of available hard-disk space • Monitor resolution: 1024 x 768 (XGA) - minimum • Allworx Interact or Allworx Interact Professional application • Internet connection
Allworx server	<ul style="list-style-type: none"> • Allworx Server Software Version 7.5.9.4 (minimum) • IP Address or DNS name Allworx server • Allworx username and password
Allworx phone	<ul style="list-style-type: none"> •

7.3 Layout



7.4 Hold a Call

To hold a call using the Allworx Interact Edition:

To place an answered call on hold, click the **Hold** button in the Allworx Interact pop-up window (default is the lower, right-hand corner of the computer screen).

For a Shared Appearance call click the drop-down list button to select Privacy Hold or Shared Hold. The default behavior is Shared Hold.

To reconnect a call on hold, click the **Resume** button in the Interact window.

To hold a call using the Allworx Interact Professional Edition:

Clicking the **Hold** button places the current call on a Privacy Hold. The Allworx Interact Professional application displays the status icon/call status, call duration, the caller ID name and number, End Call and Resume buttons.

For a Shared Appearance call click the drop-down list button to select Privacy Hold or Shared Hold. The default behavior is Shared Hold.

Click the **End Call** button to disconnect the current call, or the **Resume** button to reconnect the current call.

7.5 Transfer a Call

To transfer a call in the Allworx Interact Professional edition:

1. Locate the Current Calls window, and then the current phone call.
2. Click the **More** drop-down arrow, and then select a transfer option:

Option	Description
Blind Transfer	Place the call unannounced to an extension or external phone number.
Attended Transfer	Place the call announced to an extension or external phone number.
Transfer to my voicemail	Place the call directly to the user's voicemail. This option only: The call transfers immediately, and no longer displays in the Current Calls window.
Transfer to voicemail	Place the call directly to the another user's voicemail.
Park	Place the call to a Parking Orbit, and then displays the Parking Orbit number for a short period of time.

3. Click a listing in the Contacts, Call History, or Current Call window or use the dial pad. The call transfers.

Transfer shortcuts:

Shortcut	Description
Left click and drag	Blind Transfer. User clicks on the active call, and then drags the call to a listing in the Call History or Contacts list. Release the left mouse button to immediately connect the two calls.
Right click and drag.	User right clicks on the active call, and then drags the call to a listing in the Call History or Contacts window. After releasing the right mouse button, a drop-down list displays. <ul style="list-style-type: none"> • Blind Transfer* - Selecting this option, the application immediately connects the two calls. • Attended Transfer* - Selecting this option, a second call listing displays in the Current Calls window. After the target answers: <ul style="list-style-type: none"> • Transfer - completes the transfer • Try Again - drops the current Transferee, and the call is available for an Attended Transfer to another listing. • Cancel - drops the current Transferee, and the Transferor is able to route the call as necessary. • Vmail Transfer** - places the call directly to the contact listing voicemail.

Shortcut	Description
Right click a Call History listing.	<p>User right clicks a listing in the Call History and selects one of the options:</p> <ul style="list-style-type: none"> • Dial - Place a call to the selected listing. • Intercom - Place an Intercom call to the selected listing. • Blind Transfer* - Selecting this option, the application immediately connects the two calls. • Attended Transfer* - Selecting this option, a second call listing displays in the Current Calls window. After the target answers: <ul style="list-style-type: none"> • Transfer - completes the transfer • Try Again - drops the current Transferee, and the call is available for an Attended Transfer to another listing. • Cancel - drops the current Transferee, and the Transferor is able to route the call as necessary.
Right click a Contact listing	<p>User right clicks a listing in the Contact window and selects one of the options:</p> <ul style="list-style-type: none"> • Favorite - Mark the contact as a preferred listing. • Dial - Place a call to the selected listing. • Intercom - Place an Intercom call to the selected listing. • Blind Transfer* - Selecting this option, the application immediately connects the two calls. • Attended Transfer* - Selecting this option, a second call listing displays in the Current Calls window. After the target answers: <ul style="list-style-type: none"> • Transfer - completes the transfer • Try Again - drops the current Transferee, and the call is available for an Attended Transfer to another listing. • Cancel - drops the current Transferee, and the Transferor is able to route the call as necessary. • VMail Transfer (Allworx Directory only) - places the call directly to the transferee's voice mail box. • Details... (Outlook personal directory only) - the Contact Details window opens for the user to select the primary phone number.

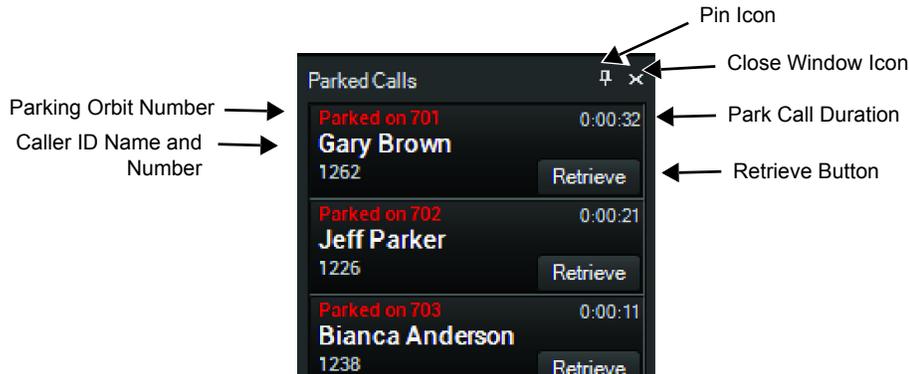
* The user interface guides the user to potential transfer targets.

** Available only to an Allworx Contact Listing.

7.6 Park a Call

Click the Parked Calls window to view the status listing of each parked call. The status listing

provides: Parking Orbit number, wait duration, Caller ID name and number.



To park a call in the Allworx Interact Professional edition:

Drag and drop the call listing in the Current Calls window to the Parked Calls window. Or,

1. Locate the Current Calls Window, and then the current phone call.
2. Click the **More** drop-down arrow, and select **Park** from the drop-down list.

To return to the call, click **Retrieve** or double-click the listing.

7.7 Conference Call

To conference call in the Allworx Interact Professional edition:

1. Place the active call on hold.
2. Place or receive a second call, the Current Calls window displays both calls.
3. Click the **More** drop-down arrow, and select **Conference** from the drop-down list to join all callers. This connects both calls to a single, active call. The display shows both calls as in conference.

Placing a call on hold temporarily removes the caller from the conference. To rejoin the conference, repeat steps 3 and 4.

If the user initiating the conference call hangs up with the handset, the conference call ends. Users can click the **End Call** button to disconnect one of the parties, if necessary. If one party hangs up, that segment drops.



8 Call History Window

The Allworx Interact Professional edition loads the call history when first opening the application, and then updates with each call. The Call History window provides a listing of the latest 99 entries. As the application adds new entries to the list, the application deletes the oldest Call History list entry. The call items display the:

- caller ID.
- date/time of call.
- status icons.

8.1 Objective

Upon completing the call history window instructions, Allworx Interact and Allworx Interact Professional users can manage the call history window by:

- viewing call details.
- placing a call.
- searching the call history log.
- managing the call history display order.
- clearing the call history display.

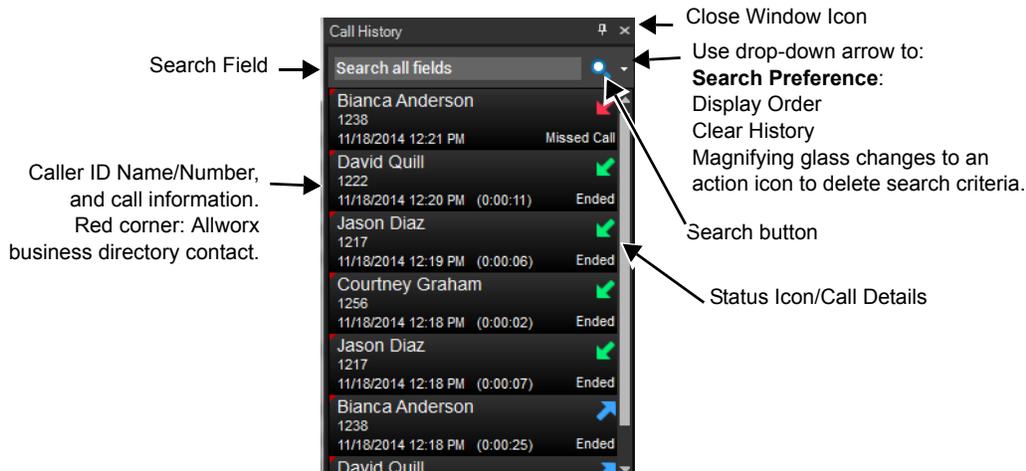
8.2 Equipment Requirements

The table below indicates a list of all equipment and requirements necessary to perform all operations identified in this chapter.

Equipment	Requirements
PC	<ul style="list-style-type: none"> • Running OS described in "Equipment Requirements" on page 1. • RAM minimum: 2 GB • 37 MB of available hard-disk space • Monitor resolution: 1024 x 768 (XGA) - minimum • Allworx Interact or Allworx Interact Professional application • Internet connection

Equipment	Requirements
Allworx server	<ul style="list-style-type: none"> Allworx Server Software Version 7.5.9.4 (minimum) IP Address or DNS name Allworx server Allworx username and password
Allworx phone	

8.3 Layout



8.4 Call Details

The call status information contains the contact name or caller ID, date/time of call, call duration, received/sent call, and indicates if the phone call was:

- Ended
- No Answer
- Missed Call

8.5 Place a Call

To place a call from the Call History window, double-click the listing or right-click on a Call History listing.

- **Dial** - places a call to the listing.
- **Intercom** - places an Intercom call to the listing.

8.6 Search

Users provide criteria in the search field and locate a specific call history listing.

To do a search within the Call History window:

1. (optional) Click the drop-down arrow next to the magnifying glass. Select the Search Preference from the list.
 - **All Fields (Default)** - display listings with any field matching the search criteria.
 - **Full name** - display the Caller ID names matching the search criteria.
 - **Number** - display the Caller ID numbers matching the search criteria.
 - **Date/Time** - display listings with a date/time stamp matching the search criteria.
2. Type the search criteria in the field. The application displays the call listings matching the Search field information in the Call History window.

To clear the search field terms, click the X next to the field.

8.7 Display Order

To change the Call History window display order:

1. Click the drop-down arrow next to the magnifying glass.
2. Select the Display Order option in the drop-down list, and then the preference. The application Call History window updates the view per the selection.
 - **Name** - displays the Call History listing by Caller ID name.
 - **Number** - displays the Call History listing by Caller ID number.
 - **Time** - displays the Call History listing with the most recent call on top. (Default setting).

8.8 Clear Call History

To clear the call history:

1. Locate the Call History Window, and click the drop-down arrow next to the magnifying glass.
2. Select **Clear History** from the list.



9 Contacts Window

The Allworx Interact Professional edition Contacts windows displays business and personal contacts specific to the user. The standard contact listing displays:

- caller ID name and number
- favorite status
- presence status icon or company name.

When undocked ([see “Windows Dock/Undock” on page 11](#)), use the window maximize button for a full-screen view of the window.

9.1 Objective

Upon completing the contacts window instructions, Allworx Interact and Allworx Interact Professional users can manage the contacts by:

- using filters.
- designating favorite contacts.
- adjusting the view size.
- knowing user status.
- placing a call
- viewing contact details.
- searching the contacts.
- adjusting the contacts display order.

9.2 Equipment Requirements

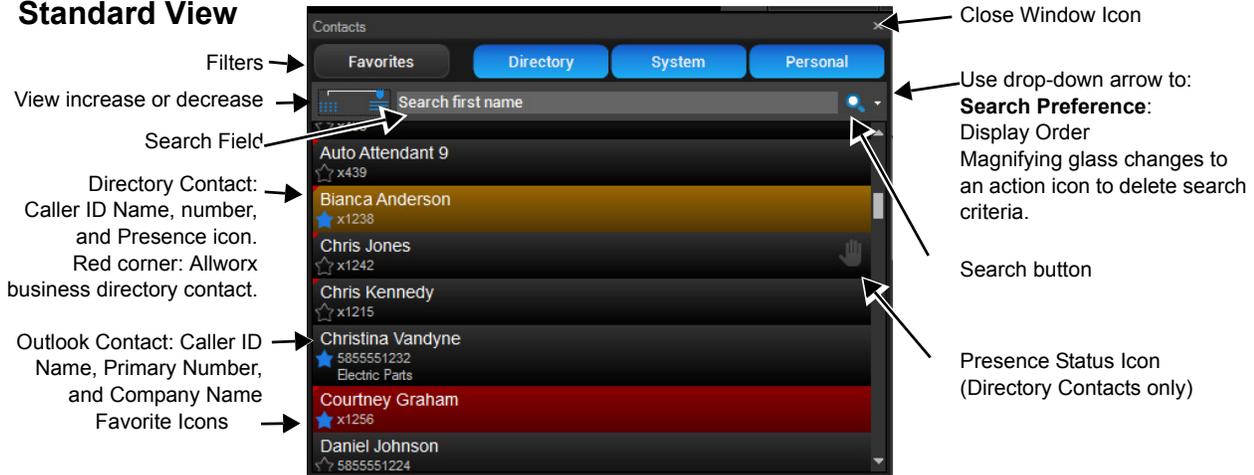
The table below indicates a list of all equipment and requirements necessary to perform all

operations identified in this chapter.

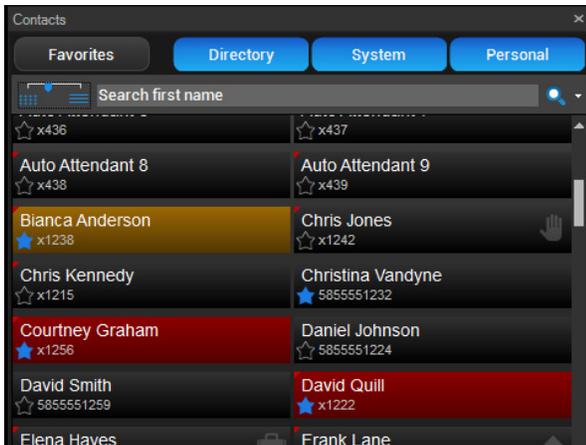
Equipment	Requirements
PC	<ul style="list-style-type: none">• Running OS described in "Equipment Requirements" on page 1.• RAM minimum: 2 GB• 37 MB of available hard-disk space• Monitor resolution: 1024 x 768 (XGA) - minimum• Allworx Interact or Allworx Interact Professional application• Internet connection
Allworx server	<ul style="list-style-type: none">• Allworx Server Software Version 7.5.9.4 (minimum)• IP Address or DNS name Allworx server• Allworx username and password
Allworx phone	

9.3 Layout

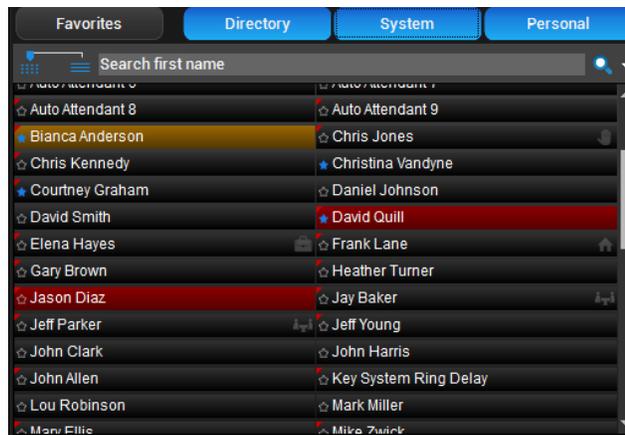
Standard View



Condensed View



Ultra Condensed View



9.4 Filters

Each filter button acts as a toggle button, turning on and off independently of the other filter buttons – adding or removing the contact entries to the list. The filter is still active after closing and reopening the Allworx Interact Professional application.

Filter	Description
Favorites	Display only Favorite contacts from selected filters.

Filter	Description
Directory	Display the Allworx directory contacts.
System	Display the Allworx Call Monitor, Call Queue, Auto Attendant, and System Paging Zones.
Personal	Display the Outlook contacts.

9.5 Favorite Contacts

To designate or remove a contact as a favorite, click on the star icon or right-click the Contact listing and select **Favorite** from the drop-down list. A blue star displays or hides in the listing, respectively.

9.6 View Adjustment

The view adjustment icon enables altering the contact listings size and a single-row to multi-column view seen in the window. The contact listing in the condensed view is a single-line entry with the username, directory contact icon, and the favorite status icon. The Allworx contact standard view has two lines of information, which also includes the contact number, and the Microsoft Outlook contact has three lines of information, which also includes the company name, if available.

9.7 User Status

The Interact Professional application uses contact listing color-coding for BLF status information, a directory contact indicator, and icons to indicate presence status. All non-Directory contacts and the Directory contact entries having an “In Office” presence do not display a presence icon, all other presences use icons to indicate the presence. See “Icons” on page 10 for further information.

Color	Description	Color	Description
Normal (Black)	Handset is idle.	Red (flashing)	Handset is ringing.
Red (solid)	Handset is on an active call.	Amber	Do Not Disturb

9.8 Place a Call

Right-click on a Contact listing.

- **Dial** - places a call to the listing. If the contact has more than one available phone number, a drop-down menu displays. Select the phone number to place a call.
- **Intercom** - places an Intercom call to the listing.

9.9 Business and Personal Contacts

The Allworx Interact Professional application accesses the business directory and the Outlook application for business and personal contacts, respectively. The Allworx Interact Professional application does not add new or update Outlook contacts, but the personal contacts refresh at each application start up. The larger the number of contacts to load from the Outlook application, the longer the Allworx Interact Professional application takes to load the contacts.

Hovering over a directory contact displays a pop-up window that includes the caller ID name and number, current status, and presence. If the Allworx directory contact is on an active call, hovering also includes the call duration. Hovering over a personal contact displays a pop-up window that includes the caller ID name and number as well as the company name, if available.

To specify the primary number of a personal contact:

1. Right-click the Contact listing. Select **Details...** from the drop-down list.
2. Locate the contact phone number, and click the drop-down arrow. Select one of the available phone numbers. Click **Done** to save the changes.

9.10 Search

When selecting a search preference, it is still active after closing and reopening the Allworx Interact Professional application.

To search within the Contacts window:

1. (optional) Click the drop-down arrow next to the magnifying glass. Select the Search Preference from the list.
 - **All Fields (Default)** - display all listings with any field matching the search criteria.
 - **Full name** - display the Caller ID names matching the search criteria.
 - **First name** - display the Caller ID first names matching the search criteria.
 - **Last Name** - display the Caller ID last names matching the search criteria.
 - **Company Name** - display the Corporate names matching the search criteria (personal contacts from the Outlook application).
 - **Number**- display the Caller ID numbers matching the search criteria.
2. Type the search criteria in the field. The application returns any contact listing containing the search criteria.

To clear the search field terms, click the X icon next to the field.

9.11 Display Order

The Contact Display Order default is Last Name, which displays as Last name, First name, and then Middle name. The Interact Professional application uses the Last name display order for all sorting orders, except for the First name option, which displays names sorted by the First Name and then Last Name. When selecting the Display Order, it is still active after closing and reopening the Allworx Interact Professional application.

To change the Contacts window display order:

1. Click the drop-down arrow next to the magnifying glass.
2. Select the Display Order option in the drop-down list, and then the preference. The application window updates the view per selection.
 - **First name** - arrange the contacts by the Caller ID first names.
 - **Last Name (Default)** - arrange the contacts by the Caller ID last names.
 - **Company Name** - arrange the contacts by the Corporate names (personal contacts from the Outlook application).
 - **Number**- arrange the contacts by the Caller ID number.

10 Troubleshooting

Condition	Description	Solution
Receiving a Windows Security Alert dialog window when clicking the Find Server IP button.	Windows users with limited privileges are clicking the Find Server IP button, and the firewall exception for the application may not exist.	<p>Click OK to close the Windows Security Alert dialog window.</p> <p>To add the Allworx Server IP:</p> <ul style="list-style-type: none"> • Ask the Allworx Server Administrator the IP address of the server, and enter the IP address manually. • Ask the Allworx Server Administrator to add a firewall exception on the workstation for the Interact Professional application.
Allworx Interact application provides “Could not access VBScript runtime for custom action” error message.	McAfee anti-virus is interfering with the installation of the Allworx Interact Professional application.	<p>User must do a complete removal of McAfee anti-virus, using the MCPR.exe tool.</p> <ol style="list-style-type: none"> 1. Navigate to Start > Control Panel > Programs and Features. 2. Locate the McAfee software, and click the Uninstall button at the top of the list. 3. Download the MCPR.exe tool from http://download.mcafee.com/products/licensed/cust_support_patches/MCPR.exe. 4. Run the tool. 5. Download Microsoft Fixit 50842.msi from http://go.microsoft.com/?linkid=9804433. 6. Run the tool. 7. Reboot the computer. 8. Install the Allworx Interact Professional software. <p>Note: The Allworx Interact Professional application requires an additional uninstallation and re-installation.</p>
The undocked Parked Calls window is empty.	The undocked Parked Calls window does not populate after selecting More > Park or when doing a drag and drop.	Verify with the Network Administrator that the Interact Professional application is on the same network as the handset and network routing is consistent.
Cannot place a call on an outside line.	Cannot access an outside phone line.	<p>Dial the outside line access digit set in your dial plan - usually “9” or “78+PIN code”.</p> <p>If this does not work, verify with the Allworx Server Administrator the outside line access information based on the Dialing Plan External Call access.</p>
Warning message during the Interact application uninstall process.	In Windows, users can install Allworx Interact for multiple user accounts.	Click Continue to un-install the Allworx Interact Professional application. This does not affect other installations of the Allworx Interact application.

Condition	Description	Solution
The Interact application does not respond. When starting Task Manager, the application does not display in the Applications tab.	Only running applications with a sustained window showing display in the Task Manager Applications list.	<ol style="list-style-type: none"> 1. Open the Task Manager and click the Processes tab. 2. Locate InteractStartup.exe and right click on it. 3. Click End Process to close the application.
Current active call drops when selecting Dial or Intercom features.	Handset not configured to automatically place the current call on hold so that user may place another call.	Configure the Allworx handset. On the handset, navigate to CONFIG > Preferences > Auto On Hold . Select Enabled and exit the handset configuration menu.
Not all the windows display in the Allworx Interact Professional.	The Visible Windows setting was changed.	Navigate to Settings > Visible Windows and select the windows to display.
The Allworx Interact application detects an upgrade is available, but user sees an error message when attempting to upgrade.	The Allworx Interact application detected an upgrade.	Exit the application by clicking the icon in the Windows System Tray, and click exit. Restart the application.
The current Allworx Interact application version level does not match the Control Panel > Programs and Features > Uninstall or change a program version level after upgrading the application.	Control Panel > Programs and Features > Uninstall or change a program page reports the application installed version, not the upgraded version.	The Windows uninstaller works without regard to version level reported in the control Panel > Programs and Features > Install or change a program page.
The Intercom Call option does not work.	The 9202E model Allworx phone does not support Intercom Calls.	The 9202E model Allworx phone does not support Intercom Calls.
Windows .Net 4.0 framework does not install.	Windows XP x64 SP2 operation system users: installing .Net 4.0 requires the installation of the windows imaging component.	<ol style="list-style-type: none"> 1. Navigate to www.microsoft.com. Locate the search field and type download wic. 2. Click the Download Windows Imaging Component from Official Microsoft... 3. Click the download button, and follow the on screen prompts. 4. Click Finish once complete. If the Allworx Interact Professional install is still running, click Back, and then Next to continue. If not running, restart the Allworx Interact installer.

Condition	Description	Solution
The application provides fewer than expected features.	Only the free features are working (call pop ups), but not the licensed features of Allworx Interact Professional.	The Allworx Server Administrator enables individual users for Allworx Interact Professional. Ask the administrator to reserve a license, or make the user eligible to obtain a license (see the Allworx Server System Administrator's Guide). Users see licensing changes take effect on the next logout/login in the Allworx Interact application.
The font does not look crisp.	Windows XP users may experience bit mapped fonts within the Allworx Interact Application.	<ol style="list-style-type: none"> 1. Navigate to the computer desktop and right-click on the desktop. Select Properties from the drop-down menu. The Display Properties control panel box displays. 2. Click the Appearance tab, and then the Effects... button. 3. Click the check box "Use the following method to smooth edges of screen fonts". 4. Click the drop-down arrow and select Cleartype. 5. Click OK, and then click Apply, and then click OK to save the changes.
Some pre-requisites could not be installed error message displays and the .NET 4.0 Framework fails to install.	The .NET 4.0 Framework installation requires Administrative privileges.	Contact the Network Administrator to install the .NET 4.0 Framework.
Cannot find the personal contacts in the Contact window.	Outlook 2010 contacts do not display in the Allworx Interact Professional Contact window.	<p>The Allworx Interact Professional application requires the Outlook 2010 application to be open prior to launching the application.</p> <ol style="list-style-type: none"> 1. Close the Allworx Interact Professional application. 2. Launch the Outlook 2010 application. 3. Launch the Allworx Interact Professional application. <p>The Outlook contacts are now available within the Allworx Interact Professional Application.</p>
Message displays: Communication with phone has been lost. Attempting to reconnect.	The Allworx Interact application has lost contact with the phone and is attempting to reconnect.	<p>Verify the following connections:</p> <ul style="list-style-type: none"> • Phone • Computer • Network activity <p>Verify phone is not rebooting.</p> <p>If the Allworx Server Administrator rebooted the phones, restart the Allworx Interact or Allworx Interact Professional application.</p>
Message displays: Reconnecting with the phone.	The Allworx Interact application connection to phone was lost, and is actively attempting to reconnect.	<p>Verify the following connections:</p> <ul style="list-style-type: none"> • Phone • Computer • Network activity <p>Verify phone is not rebooting.</p>

Condition	Description	Solution
Message displays: Not receiving audio. Contact your system administrator.	While recording, no incoming data was received. May indicate a firewall issue.	Verify the firewall on the PC enables the Allworx Interact 1.1 application as an exception. Contact the system administrator.
The Allworx Interact application feature does not work as described.	The Allworx Interact application features are missing or don't work properly.	Verify the Allworx Interact application is the latest version.
Password failure	The Allworx Interact application does not accept the newly changed password.	The new password does not meet the Allworx server requirements. Contact the Allworx Server Administrator for the password requirements.
Message displays: The recording directory file system is full. Recording has been stopped.	The call recording storage directory has no more storage space available.	Move or delete older call recording files or designate a new location to store call recording files. See "Recording" on page 21 for more information.
The recording directory no longer exists. Please check the file system.	The call recording storage directory is not available.	Verify the directory is still available or designate another location to store the call recording files. See "Recording" on page 21 for more information.



Toll Free 1-866-ALLWORX • 585-421-3850

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