Allworx® Interact™ Release 5.1

Including

Interact, Interact Professional, and Interact Softphone

User Guide

Revision: A   Updated October 21, 2020

allworx®

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Including Interact, Interact Professional, and Interact Softphone

User Guide

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Documentation

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Environmental Conditions

Allworx servers and phones

Operating:	
Temperature	+5° to 40° C / +41° to +104° F
Relative Humidity	5 to 90% (non-condensing)
Storage:	
Low Temperature Point	-40° C / +40° and any convenient humidity
High Temperature Point	+66° C / +150° 15% RH
High Relative Humidity Point	+32° C / +90° 90% RH

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Allworx® Verge™ IP phone series
Allworx® 92xx™ IP phone series
Allworx® Verge™ 9304
Allworx® Verge™ 9308
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Allworx® Connect™ 536/530 server
Allworx® Connect™ 536 server
Allworx® Connect™ 530 server
Allworx® Connect™ 324/320 server
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Revision History

Revision	Date	Description
A	21-OCT-2020	Title modification and content update for release 5.1. Including access to Visual Voicemail through the *Messages* tab (Section 6.7).

Content

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Chapter 1 Introduction

Allworx Interact™ provides Windows PC users with an intuitive, configurable user interface for controlling an Allworx desk phone (located physically near the user's PC) or an Interact Softphone (running inside the user's Windows PC). There are three Interact modes:

1. **Interact** is a free application available to any Allworx user. This basic application mode displays an inbound caller's name and number in a discrete pop-up dialog box on the user's PC desktop.
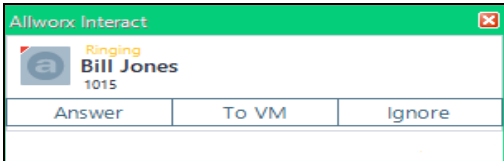
   From within this PC dialog box the user can view and answer calls that are incoming to their Allworx desktop phone. They can also choose to send the call directly to their Voicemail (Message Center) or ignore it. However, calls must be placed using the Allworx phone dialpad.

2. **Interact Professional** is a per-user licensed application mode that provides an expanded full-featured user interface and additional capabilities to the basic Interact.
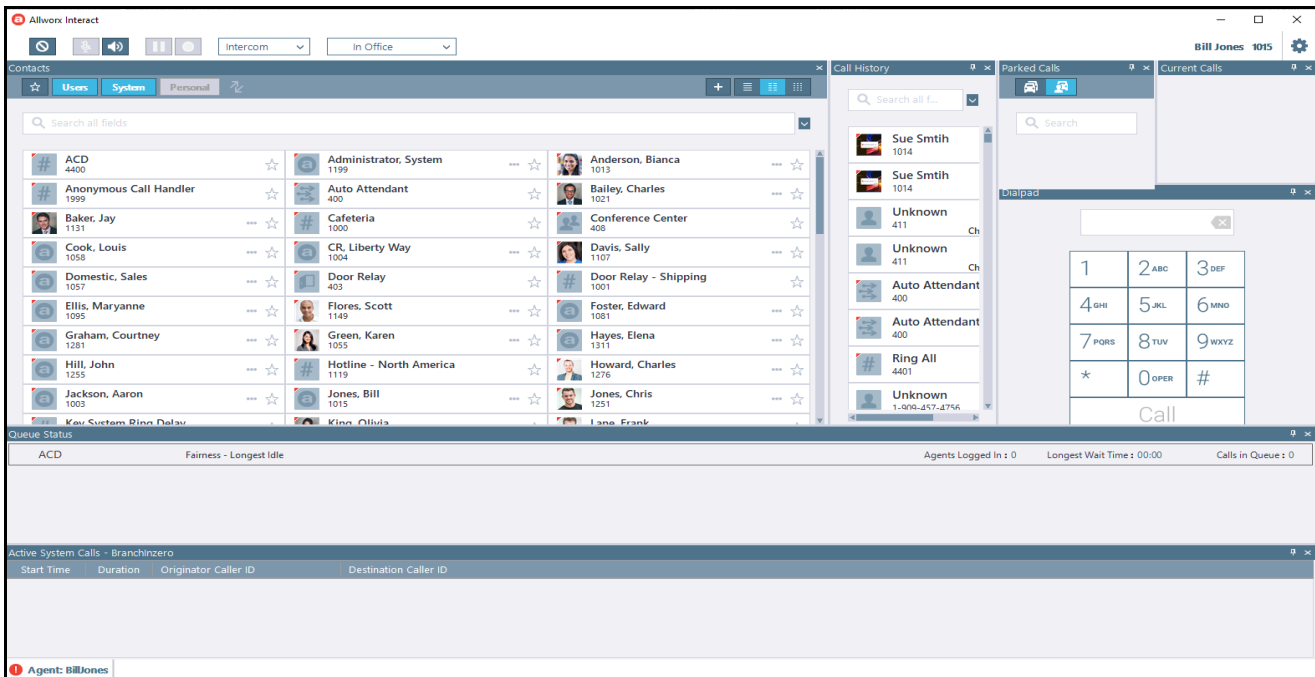
   This expanded user interface window has multiple active panes for *Current Calls*, *Parked Calls*, *Call History*, System and Personal *Contacts*, and a *Dialpad*. The *Contacts* pane provides information that includes an Allworx user's presence, availability, and favorite status. With Interact Professional, users can simply click once to dial, transfer, park, or record calls.

3. **Interact Softphone** is another per-user licensed application mode that allows the user's Windows PC to function as a phone. Calls are managed using the same Interact Professional expanded user interface window with the PC microphone and speakers, or a PC headset (preferred), for audio hardware instead of an Allworx desk phone.
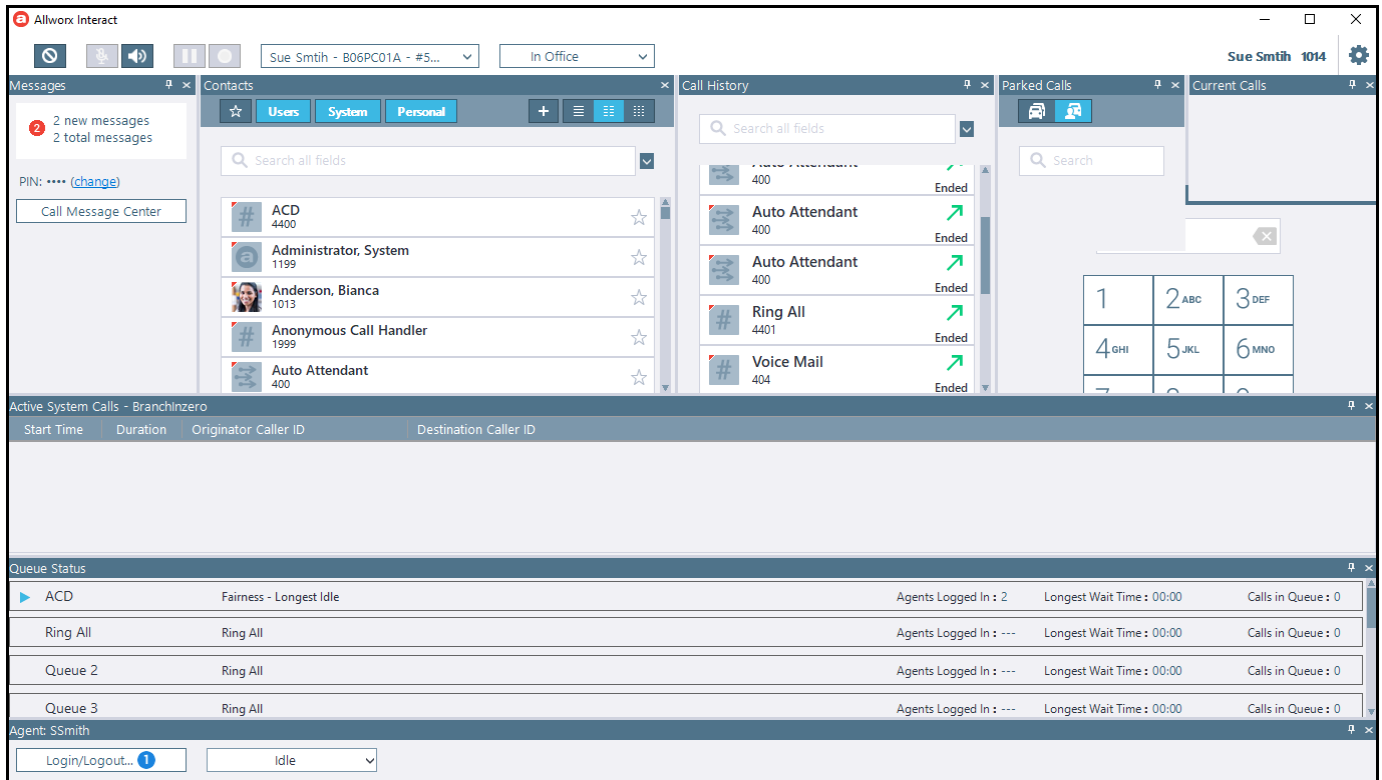
Where a traditional Allworx desk phone associates functions with physical buttons (PFKs), Interact Softphone enables those features from the Allworx server and provides indications within the user interface. For example, a *Message* pane is included in the expanded user interface to provide Softphone users with an indication of new voice messages and access to the Message Center.

Note: An Interact Softphone license allows the user to switch between controlling a Softphone and controlling an Allworx desk phone, based on the handsets assigned to the user by the Allworx server administrator.

1.1   Who Should Read this Guide

This guide is for individual users and Allworx administrators who install, configure, and use Interact application software.

1.1.1   Guide Organization

This guide is organized by the layout of the user interface and each chapter provides step-by-step instructions for using the features provided within the specified area of the user interface. For a cross referenced list of the most common call management tasks discussed throughout this document, see "Task Table" on page 91.

1.2   Equipment Requirements

The following table provides a list of the equipment requirements necessary to perform the procedures described in this document.

Equipment	Requirements

PC	• Running OS (with latest service pack)
	
	  • Windows 7, 32- and 64-bit (SP1) • Windows 8/8.1, 32- and 64-bit • Windows 10, 32- and 64-bit
	  • Windows Server 2012/2012R, 2016, and 2019
	
	• RAM minimum: 2 GB
	• Monitor resolution: 1024 x 768 (XGA)
	• Internet connection
	• Allworx Interact application with Interact Professional, Interact Softphone, Interact Sync, if needed
	• Microsoft .NET Framework 4.5.1
	• Administrative permission for the PC for application installation
	• For Interact Softphone: Audio hardware suitable for business telephony; Allworx suggests headsets certified by Microsoft (https://docs.microsoft.com/en-us/skypeforbusiness/certification/devices-usb-devices)

Allworx Server	• Allworx username and password
	• Allworx System Software Version 8.6 (minimum required for Interact Softphone), 7.5.9.4 (minimum for basic Interact and Interact Professional), but 7.5.19.1 or higher is preferred.
	  Notes:
	  • *Not all Interact Professional features will work with Allworx System Software 7.7 and lower.*
	  • *Allworx System Software version 8.5 and higher requires using Interact Professional version 4.0 or higher.*
	
	• IP Address or DNS name of each Allworx server
	• Administration permissions and passwords for each Allworx server
	• Feature key for Interact Professional or Interact Softphone
	• Feature key for Interact Sync (for Allworx System software 8.1 and lower)
	• Feature key for Automatic Call Distribution
	• Visibility to the Allworx View Server (also requires the View CDR function key - minimum)

Allworx IP Phones (For Interact and Interact Professional only)	• 92xx IP Phones • Verge IP phone series

1.3 Product Comparison

Note: Interact with support for Interact Softphone can only be used with Allworx Connect Servers running System Software version 8.6 or higher.

	Basic Interact (using pop-up dialog box only)	Allworx Interact Professional and Interact Softphone (using expanded Interact Professional user interface)
Call Handling		
Answer / Ignore / End / Place on hold	✓	✓
Transfer / Park / Conference		✓
Interact Features		
Access to the Allworx system directory, call history, and contacts		✓
Access to Microsoft® Outlook® application		✓
Access to application settings	Limited	✓
Access to handset call history		✓
The following features require Allworx System Software 7.7 or higher.		
Access to call queue status[1]		✓
Access to call queue agent status (call supervisors only)[1]		✓
Wipe current device	✓	✓
Change Allworx Password	✓	✓
Intercom call		✓

	Basic Interact (using pop-up dialog box only)	Allworx Interact Professional and Interact Softphone (using expanded Interact Professional user interface)
Call queue features[1]		✓
The following features require Allworx System Software 8.0.7.6 or higher.		
Change Allworx PIN	✓	✓
Record All		✓
Access to agent login features[1]		✓
Launch the Allworx View application[2]		✓
The following features require Allworx System Software 8.0.8.6 or higher.		
Interact Sync[3]		✓
The following features require Allworx System Software 8.1 or higher.		
Five- and six-digit extension dialing		✓
The following features require Allworx System Software 8.2 or higher.		
Contacts [4, 6]		✓
Bluetooth Support[5]		✓
Call Handoff[5]		✓
Answer an ACD call regardless of ACD Queue logged in Status[1]		✓
Customizable keyboard shortcuts		✓
Receive a notification when an Allworx User extension is available		✓

	Basic Interact (using pop-up dialog box only)	Allworx Interact Professional and Interact Softphone (using expanded Interact Professional user interface)
Hide Interact Professional / Interact Softphone application in the Windows System Tray		✓
The following features require Allworx System Software 8.5 or higher.		
Park to Extension[7]		✓
Conference calls		✓
The following features require Allworx System Software 8.6 or higher.		
Interact Softphone		✓
Messages tab for Interact Softphone access to Visual Voicemail		✓

[1] Requires the following:
  • Allworx Automatic Call Distribution feature key
  • User assigned as an agent to one or more call queues
  • Interact Professional handset with an ACD PFK assigned or the ACD Appearance or Queue Appearance programmable function(s) assigned to an Interact Softphone handset

[2] Requires the following:
  • Allworx View CDR feature key
  • Connection between the Allworx server and the View server.

[3] Requires the following:
  • Interact Sync feature key (one feature key enables the feature for all Allworx users)
  • Microsoft Skype for Business 2015 or 2016 installed
  • Microsoft Outlook 2010, 2013, or 2016 installed
  • Google Chrome™ version 41.0.2272 (minimum)
  • Mozilla Firefox® Version 38.0 (minimum)

[4] Personal Contact management requires an Allworx Connect series server.

[5] Requires the Verge 9312 IP Phone for Interact Professional.

[6] External Personal Contacts are not synchronized with the Verge 9304 IP Phone.

[7] Compatible with Interact application version 4.0 or later — including Interact 5.0 with support for Interact Softphone.

Chapter 2   Installation

This chapter describes how to install the Interact application and then how to log in to Interact Professional and Interact Softphone.

A single Interact installation file provides the needed options for installing all Interact modes (including Softphone) and Interact Sync. Both Interact Sync and Softphone are selections that can be made during the installation. For information about the available Interact modes, see <u>"Introduction" on page 1</u>.

To enable Interact Professional, the Allworx Server Administrator needs to provision an Allworx Interact Professional license for each user. When the user logs in after that license becomes available, they automatically have the Interact Professional version of the application. If no license is available, they see the basic Interact version of the application.

The Interact Softphone software is delivered with Interact software, and users with an Interact Softphone license can use their PC as a phone — with the expanded Interact user interface and the PC microphone and speaker for audio hardware (instead of Allworx desk phone hardware). An Interact Softphone license also allows the user to switch between controlling a Softphone and controlling an Allworx desk phone.

Notes:

- *The basic Interact application is automatically available to users without the need to purchase licenses.*

- *If a user has an Interact Softphone license assigned, they do not also require an Interact Professional license.*

2.1   Checklist

Complete the following steps in this order for a successful installation. Click the links in the *More Information* column for additional details.

Step	Description	More Information
	Download and Install the Interact Application	
	Note:	
	• *You must have administrator rights for the PC on which the application will be installed.*	
	• *Allworx Connect server needs a Feature Key for the number of Interact Professional and/or Interact Softphone handsets needed, and these Feature Keys must be installed prior to installing and logging in to those applications.*	
1	Allworx Connect server must be running the appropriate version of the Allworx System Software.	See <u>"Equipment Requirements" on page 3</u>
2	The Allworx server administrator may create Handset Configuration Templates for some classes of users (e.g. add the ACD function to a template for Softphone ACD users).	See the *Allworx System Software Administrator Guide.*

Step	Description	More Information
3	The Allworx server administrator completes one of the following tasks: • Create the required handsets, assign them to users, and adjust the handset configuration for each handset. • Make some Interact Softphone users eligible to create the required handsets and configure the Handset Configuration Template to be used for those handsets. *Note: Users who have been assigned an Interact Softphone handset, or are eligible to create their own, will find that option in the Handset Selection dialog box when logging into Interact. The description for an Interact Softphone handset always includes the PC hostname of the last place that handset was used.*	See the *Allworx System Software Administrator Guide.*
4	Download the Interact application from the following location: http://get.allworx.com/interact/	See
5	Double-click the downloaded installer to start the installation wizard.	
6	Click **Next**.	
7	Accept the *End-User License Agreement* and click **Next**.	
8	Click to select to install Interact Softphone or leave the selection blank to not install Softphone.	
9	Click **Next**.	
10	Configure the application shortcut by checking the box and click **Next.**	
11	The *Ready to Install* dialog box opens. Click **Install** to begin. Follow the instructions in the setup wizard.	
12	Click **Finish** to complete the installation and launch the application.	
Log in to the Interact Application		
9	Launch the Interact application	See
10	Enter the Allworx *Username* and *Password*.	
11	Enter the Allworx Server IP address.	
12	Click **Login.**	

2.1.1   Interact Application Licensing

With an Interact Professional license, each user with a license can run the software simultaneously on as many PCs as needed. The description on the license changes to reflect the name of the most recent PC on which it was started.

This description also applies to an Interact Softphone license when using the Interact Professional features to control Allworx desk phones. However, when using the Softphone inside the Windows PC,

the license can be used for multiple locations but not simultaneously. One license equals one handset (including its configuration), and that license can migrate from one PC to another (e.g. desk phone by day and Softphone in a laptop at night). For multiple locations and simultaneous uses of Softphone, multiple Interact Softphone licenses are required. The Allworx server administrator must create multiple Interact Softphone handsets, each with their own configuration.

2.2 Installing and Logging In to the Application

Note: The 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 application:

1. Navigate to http://get.allworx.com/interact/ to locate and download the appropriate application installer file.

2. Double-click the downloaded installer. The *Interact Setup Wizard* dialog box opens.

3. Click **Next**.

4. Accept the *End-User License Agreement* and click **Next**.

5. Select an Interact Sync setup option.

Option	Description
Do not install Interact Sync. I will install it later if I need it.	Bypasses the Interact Sync installation step. This is the default setting.

Install Interact Sync now (Administrator access required.).	Installs Interact Sync.
	Installing this feature requires:
	• Interact Sync feature key (one feature key enables the feature for all Allworx users)
	• At least one of the following:
	  • Microsoft Skype for Business 2015 or 2016 installed
	  • Microsoft Outlook 2010, 2013, or 2016 installed
	  • Google Chrome
	  • Mozilla Firefox

6. Click to select to install Interact Softphone, or leave the selection blank to not install Softphone.

7. Click **Next**. Configure the application shortcut by checking the box.

Option	Description
Create a shortcut for Interact on the desktop	Places a start up icon on the computer desktop. User double-clicks to activate application.
Start Interact automatically when I log in	Log in to the computer, and Interact automatically initiates.

8. Click **Next.** The *Ready to Install* dialog box opens. Click **Install** to begin.

9. Click **Yes** in the *User Account Control* window, if prompted.

10. Click the *Launch Interact* check box.

11. Click **Finish** to complete the installation and launch the application.

To log in to the application:

1. Launch the Interact application.

2. Enter the *Allworx Username* and *Allworx Password* in the dialog box.

3. Enter the *Allworx Server* IP address. If the IP address is unknown, click **Find Server IP**.

   Notes:

   • *If needed, 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 administrator to add a firewall exception on the workstation for the Interact application.*

   • *On first use of Interact Softphone, the user should click on the Audio Device Selection icon and select appropriate devices for Microphone and Speaker. This selection can also be made by selecting Audio Devices from the settings icon (⚙) drop-down list.*

4. Click **Login**.

Application Mode	Behavior
Interact	The application icon is visible in the Windows System Tray.
Interact Professional and Interact Softphone	The application opens and displays the full-featured user interface, and the application icon is visible in the Windows System Tray which is by default in the lower, right corner of the PC screen. ***Note:*** *If the application was closed while hidden, the application re-opens hidden (minimized to the Windows System Tray).*

After clicking **Login**, one or more of the following notifications may appear:

Notification	Description
Handset Selection	Displays if the user has multiple assigned handsets. • Click to select a handset from the drop-down list. • Click Create a Softphone handset if available. This option is only available if the Allworx Administrator has made the user eligible. • Click OK to continue logging in to the application.
Install Interact Sync	Displays when the Interact Sync option is not installed and informs users of the additional benefits of installing Interact Sync to use with Interact Professional and Interact Softphone. Select an available option; the recommended option is *Install Interact Sync now (Administrator access required)*.

Notification	Description
Update is available	Displays when there is an Interact application upgrade available. Click **Yes** to update the application or click **No** to continue logging in to the application.
Change password	Displays if the Allworx administrator requires the user to change the current Allworx password. Follow the prompts to change the current password. See "Changing the Allworx Password or Allworx PIN" on page 11.
Set your user image	Displays when the user who is logged in to the application does not have a contact image. Click **Yes** to update the contact image or click **No** to continue.
Sync contacts with Outlook	Displays the first time the Interact Professional or Interact Softphone user logs in to synchronize Outlook contacts with Personal Contacts.
New Outlook contacts found	Displays when the Interact application has found new Personal Contacts in the Outlook application. ***Note***: *This is only available on Verge IP phones using a Connect server.*

5. Download the supporting documentation from http://get.allworx.com/interact.

6. Place a test phone call. See "Managing Calls" on page 21 for more information.

2.3 Changing the Allworx Password or Allworx PIN

Initiate a change to the user login password (for application login) or PIN (for access to ACD queues, Allworx Message Center, etc) from the settings (⚙) drop-down list. To make the change, users must supply both old and new passwords or PINs during the request in the dialog box. The new password or PIN must comply with the Allworx System Software requirements.

To change the login password or PIN:

1. Log in to the application, and then follow the steps for one of these options:

Option	Interact Basic	Interact Professional	Interact Softphone
Interact Icon in the Windows System Tray or on the Interact application Settings icon > Settings and select: **Change Password** or **Change PIN**	✓	✓	✓
From the settings menu (⚙) navigate to **Options** > **Change Password** or **Change PIN.**		✓	✓

2. Enter the required information in the pop-up dialog box

3. Click **OK**.

   A notification displays indicating the request was successful. Click **OK** in that pop-up window to return to the application.

2.4   Connecting Headsets

Both the Interact and Interact Professional applications connect to an Allworx Verge phone and the headsets are connected to those phones as indicated in the user guides for the Allworx 92xx and Verge series IP phones. These documents are available on the Allworx website Partner Portal (allworxportal.com).

Interact Softphone allows users to place and receive calls using their Windows PC - without connection to an Allworx phone. As a consequence, wired (preferably USB) and *Bluetooth* headsets are connected to the PC itself as directed in that equipment's documentation.

Note: *For information about recommended headsets, see the document titled "Allworx Headset Compatibility Guide" that is available at* allworxportal.com.

Chapter 3   Application User Interface Overview

There are two user interfaces for managing calls in the Allworx Interact application modes. The first is a pop-up dialog box that is available for all three applications modes and appears in the lower right corner of the PC desktop when there is an incoming call. Basic Interact connects to an Allworx desk phone and this dialog box is the <u>only</u> way to answer a call, put a call on hold, or end a call on a PC when using that mode.
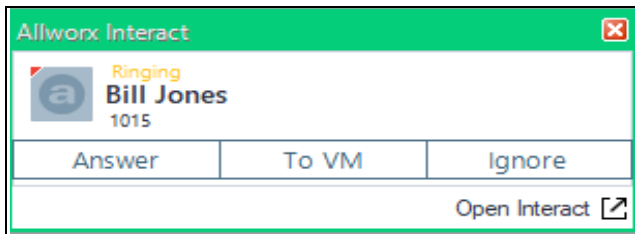
This option is <u>not</u> available in the dialog box for basic Interact.

For all Interact application modes, click one of the following actions in this dialog box:

| Action	Description
Answer	Accepts the call.
To VM	Transfer the call to Voicemail (Message Center).
Ignore	Stops the ringing of the incoming call and dismisses the dialog pop-up.
Open Interact *(not available for basic Interact)*	Opens the minimized Interact Professional / Interact Softphone expanded user interface.

The second user interface provides expanded call management features for both the Interact Professional and Interact Softphone application modes.

An Interact Professional license, like basic Interact, connects the user's PC to an Allworx desk phone and has those same capabilities, but adds the abilities to place, transfer, park, or conference a call. Additionally, Interact Professional provides access to Call History, Queue Status, as well as Allworx System, User, and Personal Contacts. All features are accessed from the Interact Professional user interface.

An Interact Softphone license allows the use of the expanded Interact user interface to run a phone entirely within the Windows PC using the full-featured Interact Professional user interface. Depending on the configuration defined by the Allworx server administrator, this license can also allow user's to manage calls through their Allworx desk phone.

For detailed information about implementing the Interact Professional user interface features, see <u>"User Interface Window" on page 51</u>. This user interface uses visual cues for call status and User Contact presence, availability, and favorite status.

The following screen is an example of the expanded, full-featured user interface window used with Interact Professional and Interact Softphone.
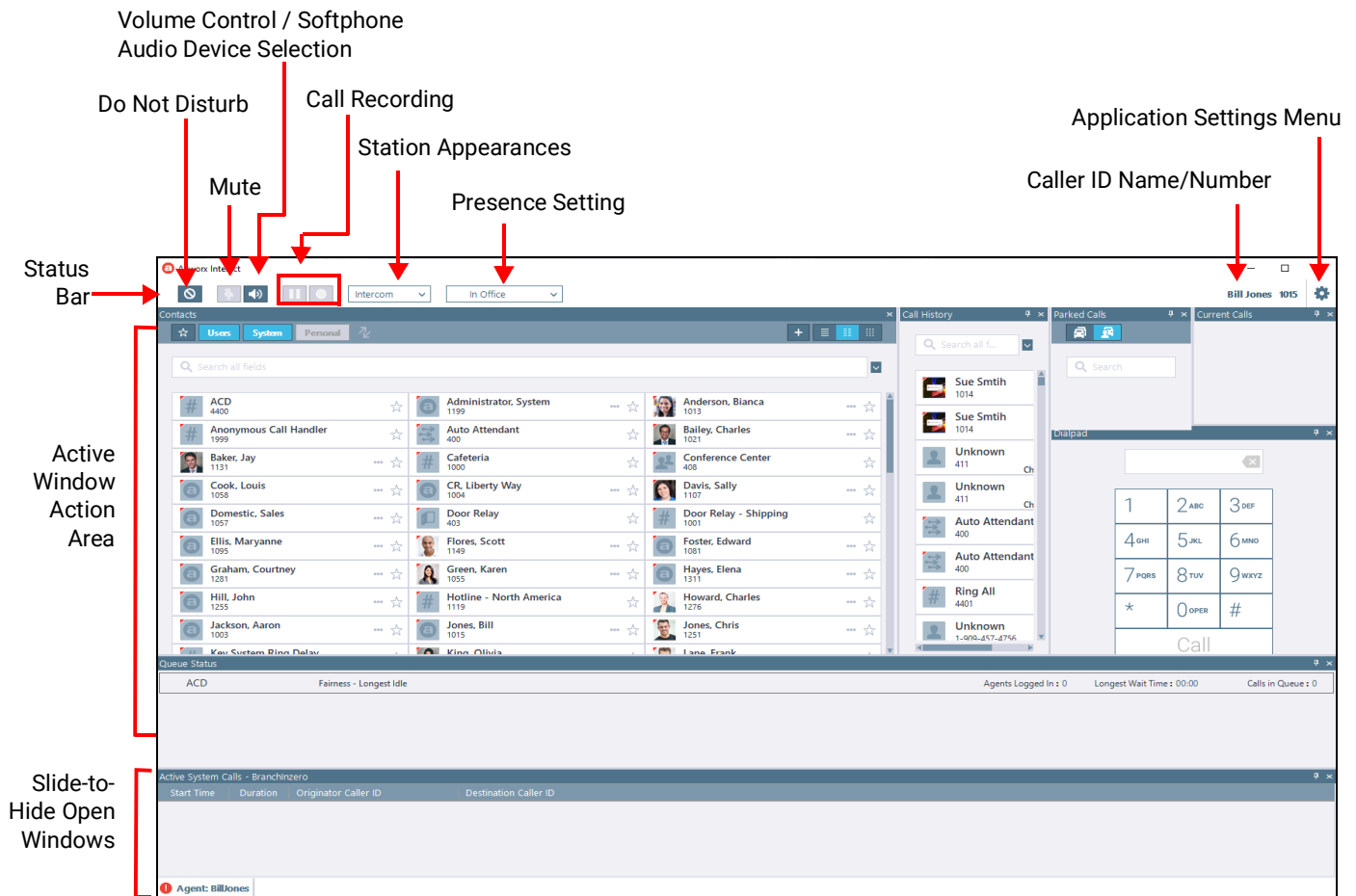
The main user interface window (page 14) provides the flexibility to customize the display and position of the panes within the window to accommodate user preferences. Users can set the preferences listed in the following table.

Note: For information about how to define the panes that are visible within the user interface window, see "Adjusting Application Settings" on page 39.

Preference	Description
Slide-to-hide tab	Click to open the window. Click the Unpinned active icon to keep the window open. The window is available to undock from the main application window.
Pin or Unpin	Click the Pin active icon for each window to keep that window visible while docked in one of the slide-to-hide panels.
Resize	Open each window within the main application screen and manage the windows size without using valuable computer screen space.

Continued

Preference	Description	
Undock or dock	Place the windows on top or under the main application menu window (maximized applications can obscure the view).	
	Undocked windows	Detaches the current window from the main application screen for custom size and placement. All windows close when exiting the Allworx Interact Professional or Interact Softphone application mode and open in the same location when relaunching the application.
		To undock the window:
		1. Pin open the windows prior to undocking the window, see above.
		2. Double-click or click and drag the title bar of the application window.
		3. Move and adjust the window.
	Docked windows	Returns the window back to the main application window.
		To dock the window:
		1. Double-click the window title bar or click and drag the window back to the main application window.
		2. Drag the window to one of the placement targets shown on the application.
		Shortcut: To return the undocked window to the original, docked position, double-click the undocked window title bar or window header.
	Sample window placement options	
	X	Makes the window invisible in the docked or undocked state. To make the window visible, navigate go to the Settings menu. See "Adjusting Application Settings" on page 39 for more information.
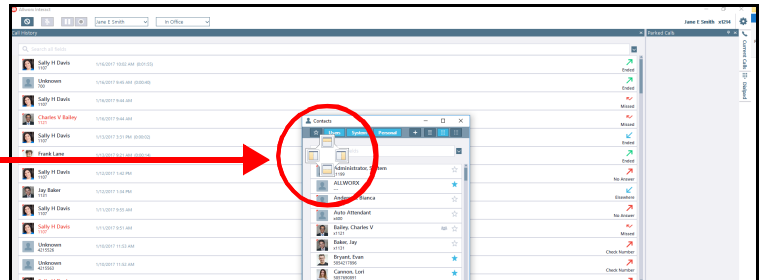
3.1   System Tray

All of the Interact application modes display the icon in the Microsoft Windows system tray (by default in the lower, right corner of the PC screen). Right-click the Interact icon to select one of the configuration options.

The available options are:

- Show Active Call window or Hide Active Call window*
- Update (displays only when a software update is available)
- Options...
- Change password
- Change PIN
- Reset UI configuration*

- Launch Allworx View**
- Find out more
- About
- Logout <username>
- Open
- Exit

* *Available only with Interact Professional and Interact Softphone licenses*

** *Available only with Interact Professional and Interact Softphone licenses and an Allworx View license*

Note: See *"Adjusting Application Settings" on page 39* *for detailed information about each option.*

3.2   Icons

The expanded user interface uses icons to navigate through the Interact Professional and Interact Softphone application modes, view the status of a call or user contact, and manage calls. The presence status icons and availability status apply to User Contacts only.

The following sections show and describe the icons available in the expanded user interface.

3.2.1   Navigation Icons

Navigation icons direct the user to panes within the window or menus to access the features available within the Interact application.

	Active Calls pane		Agent: <name> pane
	Current Calls pane		Dialpad pane
	Outside Lines pane		Parked Calls pane
	Queue Status pane		Settings
	New Interact software is available.		

3.2.2   Status Icons

The status icons provide a visual cue of contact type, presence status, and call status.

Icon	Description	Icon	Description
	Contact image icon - red corner indicates an Allworx contact.	⭐	Contact favorite.
☆	Contact is not a favorite.	💼	Presence Status - On Business Trip.
⊖	Presence Status - Busy.	🏠	Presence Status - At Home.
👥	Presence Status - At A Meeting.	🌙	Presence Status - Away.
🌴	Presence Status - On Vacation.	•••	Presence Status - Unknown.
↙	Call Status - Incoming call or call answered elsewhere	↗	Call Status - Outgoing phone call, no answer.
↙✓	Call Status - Incoming, missed call.	↗	Call Status - Outgoing phone call.
❗	Application error icon, such as BLF lost, Interact lost connection, running out of recording space etc. **Note:** *When this icon appears next to the Presence pull-down, it indicates a loss of BLF. The icon may flash on and off to indicate an intermittent loss. For more information, refer to the Miscellaneous heading in ["Troubleshooting" on page 85](#).*	🔔	Notify when available activated for Allworx User Contact.
2	Number of new messages available through Visual Voicemail or the audio Message Center. (Available for Interact Softphone only)		

3.2.3   Action Icons

The action icons allow users to customize the user interface and use the application to manage calls. Click the icon to activate the feature.

Icon	Description	Icon	Description
✕	Closes pan within the application user interface. Sets an undocked window to invisible. See ["Adjusting Application Settings" on page 39](#) to reactivate window. **Note:** *If the application was closed while hidden, the application re-opens hidden (minimized to the Windows System Tray).*	📌	Pinned pane - the pane is available for undocking.
⊥📌	Unpinned pane. The pane is available for the Slide-to-Hide option.	🚫	Do Not Disturb is Inactive.

Continued

	Do Not Disturb is Active.		Mute is Inactive.
	Mute is Active.		• Opens *Volume Control* to set the loudness of ringtones and speaker phone on an Allworx desk phone for Interact Professional.
			OR
			• Opens the *Audio Device Settings* dialog box to select the audio device(s) for the microphone, speaker, and ringtone for Interact Softphone using PC audio hardware or other handset, as well as adjust volumes.
			Note: The Volume Control ion is not available when using Interact Professional with a 92xx series Allworx Phone.
	Pause Call Recording.		Resume Recording.
	End Call Recording.		Begin Call Recording.
	Search - *Call History* and *Contacts* panes.		More Options - *Call History* and *Contacts* panes.
	Add Contact - *Contacts* pane.		Single Column Display - *Contacts* pane.
	Multiple Column Display - *Contacts* pane.		Name/Favorite Status Display - *Contacts* pane.
	Backspace - *Dialpad* pane.	Call	Place a phone call from the *Dialpad* pane. *Note: Click twice to redial the last number.*

3.3   Wipe Current Device

The *Wipe remote devices* option in the Allworx System Administration web page allows the Allworx server administrator to remove all login credentials and voicemail information for a lost or stolen remote device. Additionally, this feature disables the device from sending and receiving phone calls. This option requires the Allworx server administrator to change the user password. Information about this procedure is available in the *Allworx System Software Administrator Guide* that is available on the Partner Portal (https://allworxportal.com/)

To use the Interact application after receiving a wipe command, log in using the current credentials and the new password provided by the Allworx server administrator. See "To log in to the application:" on page 10 for more information.

3.4 Interact Sync

Interact Sync is a customizable plug-in for Interact that allows click-to-dial capabilities between the expanded user interface and versions of Skype for Business 2015 or 2016, Microsoft Outlook applications, and the Google Chrome and Mozilla Firefox web browsers installed on the PC. Additionally, Interact Sync supports synchronization between the Allworx Interact Presence and the availability setting in Skype for Business, Microsoft Outlook, and the Allworx phone.

For more information, see .

Chapter 4   Managing Calls

Use the Interact application modes to manage incoming and outgoing phone calls using a PC. Basic Interact and Interact Professional manage calls through Allworx phones, while Interact Softphone is able to place and receive calls directly from a Windows PC without a connection to an Allworx desk phone. The following common call management features are discussed in this chapter. Features not available within the basic Interact dialog box are available through the Allworx desk phone.

Feature	Basic Interact (using pop-up dialog box only)	Interact Professional and Interact Softphone (using expanded Interact Professional user interface)
Place a call	✓	✓
Answer a call	✓	✓
Place a call on hold	✓	✓
End a call	✓	✓
Answer a call in a queue		✓
Transfer a call		✓
Intercom call		✓
Conference call		✓
Park a call		✓
Supervise a call		✓
Emergency Alerts		✓

Note: A full list of Interact features and where information about those features can be found in this document is included in Appendix A "Task Table" on page 91.

To avoid disconnecting a call when answering a second incoming call, it is recommended that your Allworx System Administrator configure your phone's Handset Preference Group to enable *Auto On Hold*, or you can configure your Allworx desk phone as indicated in the following table.

Phone	Phone Navigation
92xx IP Phones	**CONFIG** > **Preferences** > **Auto On Hold**. Select **Enabled** and exit the menu. When prompted to *Save to Flash,* press the **Yes** soft key.
Verge IP phone series	**Settings** > **Phone Preferences** > **Call Handling** > **Auto On Hold**. Select **Enabled**. Press **Back** to return to the *Settings* screen and **Back** again to return to the *Idle* screen.

4.1   Placing a Call

Use one of the following options to place a call from the user interface:

Option	Basic Interact (using pop-up dialog box)	Interact Professional Expanded User Interface (through an Allworx desk phone)	Interact Softphone Expanded User Interface
Allworx Desk Phone	✓	✓	
	Note: *With basic Interact, calls can only be placed using the Allworx desk phone. Calls cannot be placed using the pop-up dialog box.*		
Call History pane		✓	✓
Contacts pane		✓	✓
Dialpad pane		✓	✓

To place a call using an Allworx desk phone:

Pick up the handset or press the speaker phone soft key, and then dial a number. After dialing the call, the Interact application displays the pop-up dialog box with the **Cancel** button. Press the **Cancel** button to stop placing the call.

To place a call using the expanded user interface *Call History* or *Contacts* pane:

1. Locate a listing in the appropriate pane of the user interface.

2. Select that listing by double-clicking it or by right-clicking and selecting **Dial** or **Intercom** from the drop-down list.

3. If the Allworx *User Contact* is busy, right-click that listing in the *Contacts* pane and select **Notify when available** from the drop-down list. When the Allworx user's extension becomes available, the user interface displays a pop-up notification message.
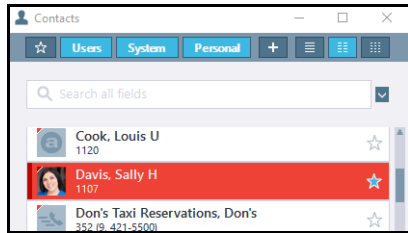
Allworx User Contact is Busy   **Notify when available Active**   **Pop-up notification**
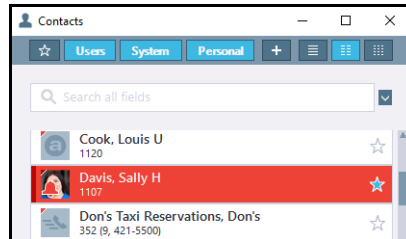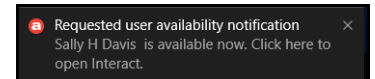
To place a call using the expanded user interface *Dialpad* pane:

See "Dialpad" on page 69 for more information.

To place a call using Skype for Business:

Open the Skype for Business application and take one of the following actions:

1. Right-click a main contact listing to display the context menu and click to select **Allworx Dial** from the menu.
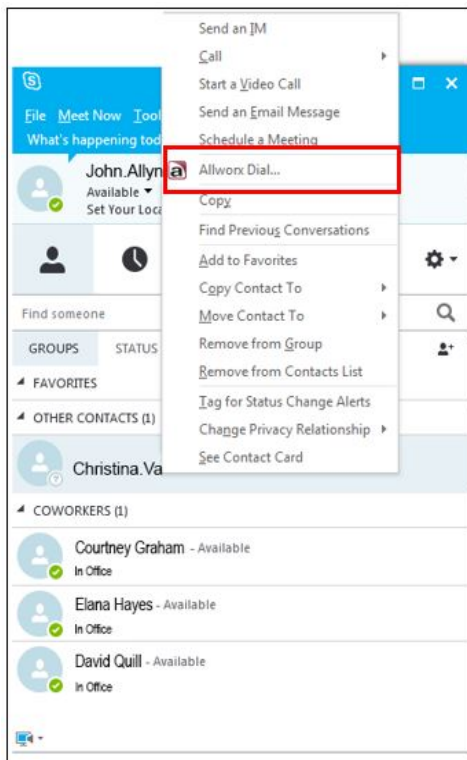
2. Click the "**…**" menu on a conversation window and click to select **Allworx Dial** in the pop-up menu.
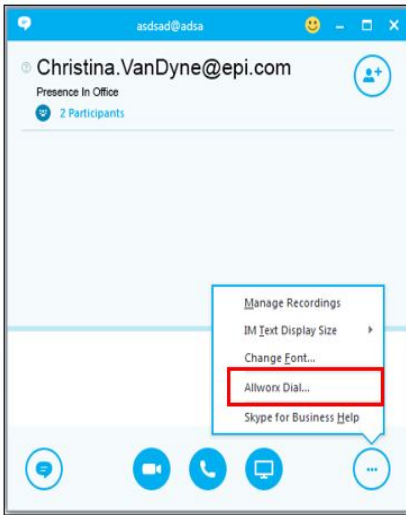
3. Click the participant list, then right-click the user and click to select **Allworx Dial** from the pop-up list.
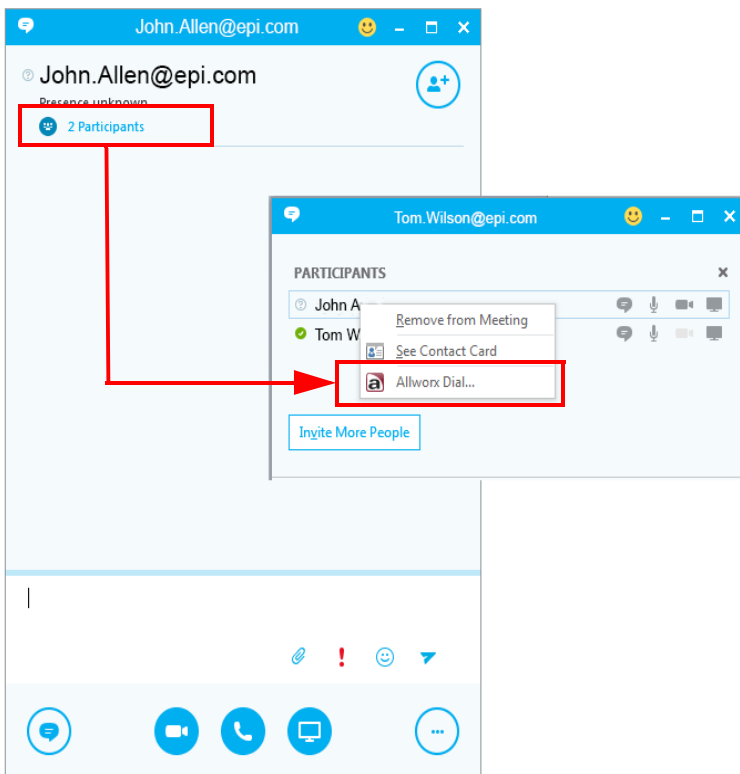
4.2   Answering a Call

The following notifications display on the PC screen when there is an incoming call:

Notification	Basic Interact (using pop-up dialog box)	Allworx Interact Professional and Interact Softphone (using expanded Interact Professional user interface)
Pop-up dialog box	✓	✓
Current Calls pane opens		✓

To answer a call from the pop-up dialog box:

For incoming calls, a pop-up dialog box displays the caller ID name/number and call management options. Click one of the following options:

Option	Description
Answer	Accept the call.
Ignore	Silences ringing and dismisses the dialog for that call. This is the same as pressing the Allworx phone Silent soft key.

To answer a call in the expanded user interface *Current Calls* pane:

For incoming calls, the *Current Calls* pane displays call information and call management options.

Pane Feature	Description
State of the *Current Calls* Pane	
Unpinned	The window opens (auto pins), and then automatically closes the window when the call ends.
Pinned	The window does not close when the call ends.
Displayed Information	
Incoming call listing	• Status icon/call details. • Caller ID name and number.
Call Notification	Pop-up indicating an incoming call with the caller ID name and number.
Call Management Options	
Answer	Displays the call in the Current Calls window and accepts the call.
Ignore	Displays in the Current Calls window and silences ringing. Click **Answer** to retrieve the call. This behavior is the same as pressing the Allworx phone Silent soft key.

To answer another user's call from the expanded user interface *Contacts* pane:

The contact listing flashes red when there is an incoming call.

1. Right-click the *Contacts* pane listing.

2. Click to select **Answer** from the drop-down list.

4.2.1   Answering a Call in a Queue

To be able to answer incoming calls to ACD or Ring All queues, the Allworx Server Administrator adds Programmable Function Keys (PFKs) to Allworx desk phones, or Programmable Functions to Interact Softphone.

Note: *The appropriate Feature Keys must be installed on the server prior to defining these queue functions.*

All calls, including calls to ACD and Ring All queues, appear in the *Current Calls* pane and can be answered from there. ACD queue agents have the additional option of answering the call from the *Agent <name>* tab located in the bottom left of the Interact expanded user interface window.
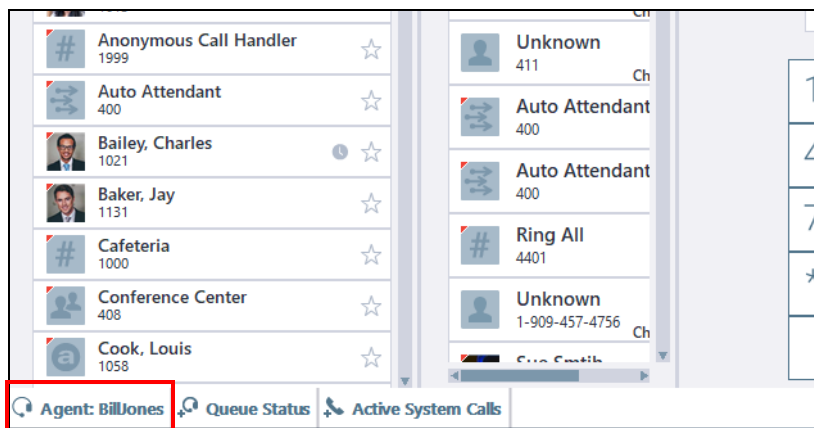
For more information, see .

4.3   Placing a Call On Hold

The Hold feature allows the temporary interruption of the connection between the callers without disconnecting the call.

To place a call on hold:

Follow the steps included in the following table.

Hold Feature	Basic Interact (using pop-up dialog box)	Allworx Interact Professional and Interact Softphone (using expanded Interact Professional user interface)
Privacy Hold	Click **Hold** in the Interact pop-up dialog box (default is the lower, right-hand corner of the computer screen).	Click **Hold** in *Current Calls* pane of the user interface. The call listing displays the following information: • status icon/call status • call duration • caller ID name and number • *End Call* and *Resume* buttons
Shared Call Appearance Privacy Hold or Shared Hold	Click **Hold** from the drop-down list in the Interact pop-up dialog box to select the preferred option. The default behavior is *Shared Hold*.	Click the **Hold** drop-down menu in the *Current Calls* pane of the user interface to select the preferred option. The default behavior is *Shared Hold*.
Resume a held call	Click **Resume** in the Interact pop-up window.	Click **Resume** in the *Current Calls* pane.
Disconnect the current call	Click **End Call** in the Interact pop-up window.	Click **End Call** in the *Current Calls* pane.

4.4   Parking a Call

The expanded user interface provides access to the System Park and Park to Extension features for both Interact Professional and Interact Softphone. For more information see .

4.5   Supervising a Call

The ability of a user to supervise calls is defined by the Allworx system administrator when the user is created (Handset Preference Group) and when the PFK (Allworx desk phone) or Programmable Function (Interact Softphone) is assigned to the handset (see the *Allworx System Software Administrator Guide* for information).

To supervise the call use the PFK on the Allworx desk phone for Interact Professional.

For Interact Softphone, click to open the call appearance drop-down menu and select the appropriate mode of call supervision.
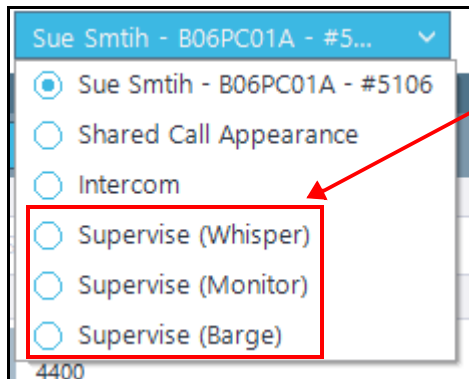
Select one of the following options:

Supervise (Whisper) - This selection allows the supervisor to speak to the user without the caller hearing the conversation.

Supervise (Monitor) - The supervisor cannot speak with either party on the call.

Supervise (Barge) - The supervisor can fully participate in the call with both parities.

Note: *This user has three Call Supervision Programmable Functions assigned to the handset -- one for each Supervise mode.*

Or, right-click on the *Contact* or *Call History* pane listing and select the supervise mode from the drop-down list.
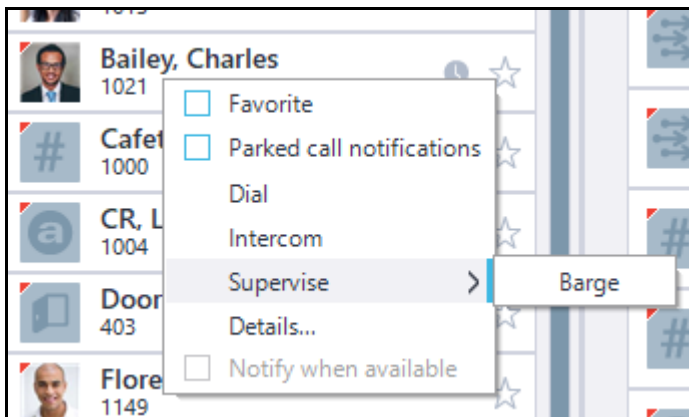
4.6   Ending a Call

Click **End Call** in one of the following locations:

Location	Basic Interact (using pop-up dialog box)	Allworx Interact Professional and Interact Softphone (using expanded Interact Professional user interface)
Pop-up dialog box	✓	✓
Current Calls pane		✓

4.7   Placing an Intercom Call

The Intercom feature displays in the expanded user interface for Interact Softphone at all times, and for Interact Professional only if the Allworx desk phone supports the feature.

- If that call appearance is currently in use, the Interact Professional application hides the option on the right-click drop-down list.

- If all other default call appearances are unavailable the application uses the Intercom appearance.

To place an Intercom call (option 1):

1. Open the *Call History* or *Contacts* pane and right-click the appropriate listing. Select **Intercom** from the drop-down list.
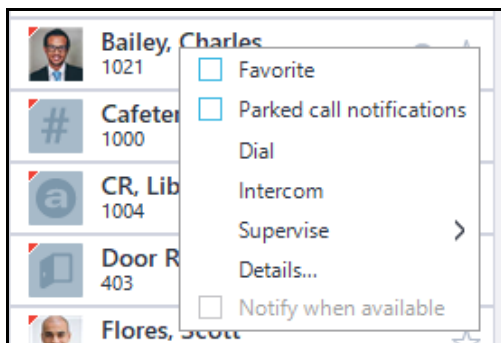
2. Wait for the tone accompanied by a single ring. The Allworx desk phone or Softphone on the receiving end automatically answers the call (default). Begin speaking when the call is answered.

   Note: *Intercom calls to external phone numbers ring as a normal call.*

To place an Intercom call (option 2):

1. Locate the station appearance and click the drop-down arrow for the default line. Click to select **Intercom** from the drop-down list.
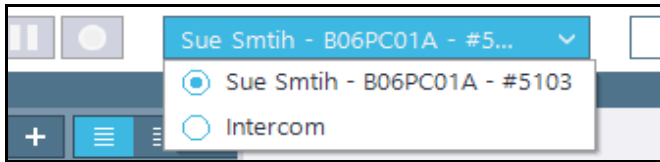
2. Double-click a listing in the *Contacts* or *Call History* pane or use the *Dialpad*. Begin speaking when the call is answered.

4.8   Receiving Emergency Alerts

Allworx System Software provides the Allworx System Administration web page for access to settings that allow users to receive Emergency Alerts on the Verge phones and on the expanded Interact user interface window when using Interact Softphone. For more information on these server settings, see the *Allworx System Software Administrator Guide* available on https://allworxportal.com/.

In order to receive Emergency Alerts for Interact Professional, a Programmable Function Key (PFK) must be created on the Allworx desk phone. For more information, see the appropriate phone user guide available on the Allworx portal. No Emergency Alert message is displayed on the expanded user interface window for Interact Professional - only the Allworx phone indicators are available.

To receive Emergency Alerts when using the Interact Softphone application mode, the Handset Emergency Alert Programmable Function must be added for the handset. When a call is made to the emergency number defined in the handset Dial Plan a flashing pop-up window appears on the expanded Interact user interface.
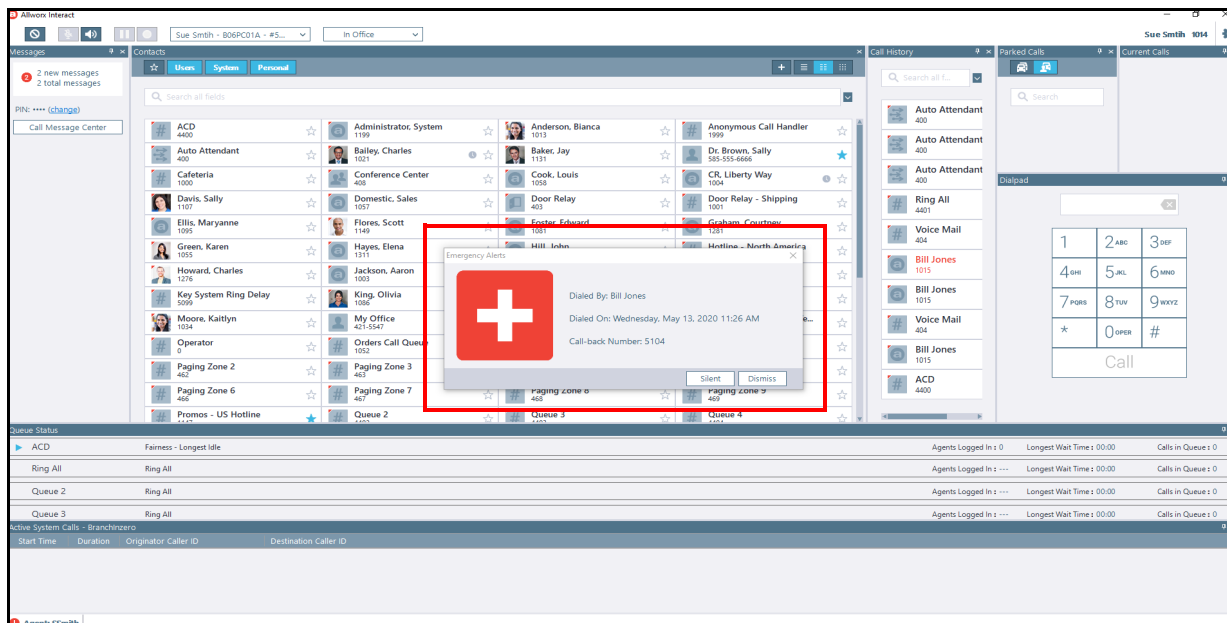
In addition to the pop-up window, an audible alarm sounds for the duration defined by the Allworx server administrator in the Interact Softphone Programmable Function.
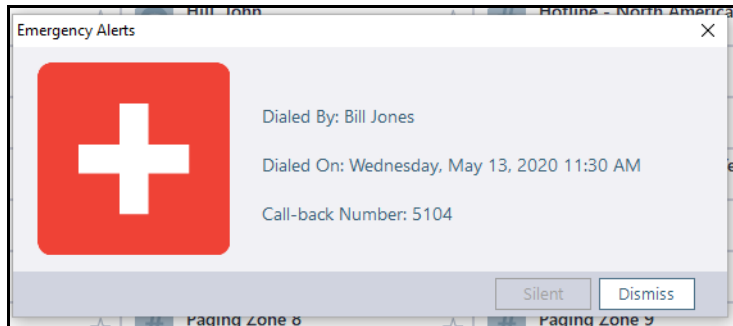
- Click **Silent** to stop the audible alarm but continue to display the pop-up window.

- Click **Dismiss** to silence the audible alarm and stop the display of the current alert.

- Click **X** to close the pop-up window.

Chapter 5 Status Bar Features

Note: *The information in this chapter applies only to the Interact Professional expanded user interface used to manage calls through an Allworx desk phone or Interact Softphone. These features are not available with basic Interact.*

The status bar appears at the top of the expanded user interface window and provides access to the following features:

- Do Not Disturb (DND)

- Mute

- Volume levels / Softphone Audio Device Selection

- Call recording

- Phone line access through station appearances

- User presence settings

- Caller ID name and extension

- Application settings
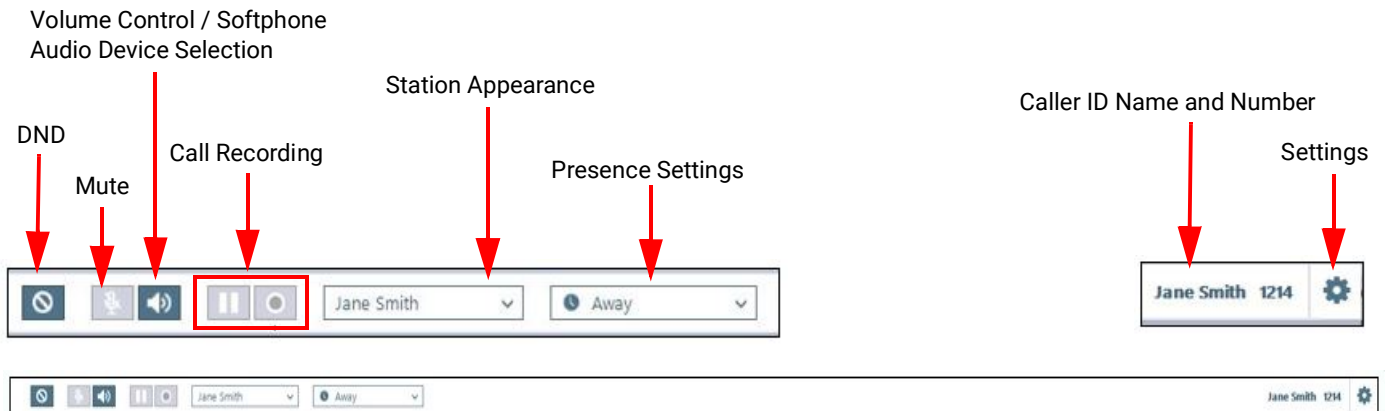
5.1   Using DND (Do Not Disturb)

When activated, the DND feature stops the handset (Allworx desk phone or Interact Softphone) connected to the application from ringing. Users can continue to place calls from the application user interface or the Allworx desk phone.

Action	Description
To activate DND	Click the **DND** button (⊘). • All calls follow the next step in the active call route. • It is possible to activate the DND option during an active call. Doing so activates the feature for subsequent incoming calls.
To deactivate DND	Click the **DND** button (⊘) a second time.

5.2   Muting a Call

When invoking the Mute feature on an active call, the individual at the other end of the call can no longer hear the user.

Action	Description
To activate mute	Click the mute icon (🎤).
To deactivate mute	Click the mute icon (🎤) a second time.

5.3   Adjusting Volume Levels and Selecting Audio Devices

Click the speaker icon (🔊) to adjust the volume levels for the handset, speaker, headset, Bluetooth, ringer, and paging by sliding the adjustment bar to the left (quieter) or right (louder). The Bluetooth and headset options are available only when that device is connected to the Allworx desk phone or to the PC for Interact Softphone.

Allworx Desk Phone Volume Control
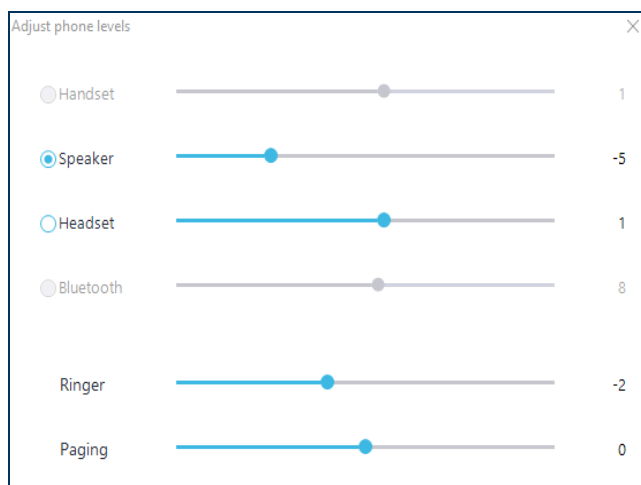
Interact Softphone Audio Device Settings
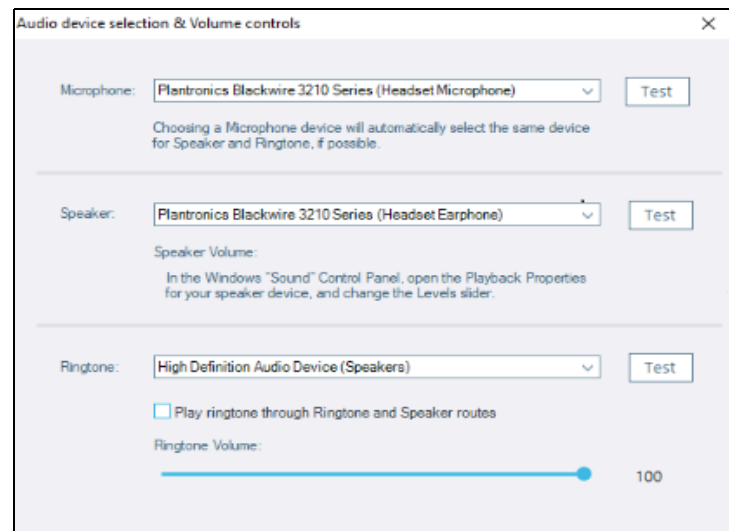
5.3.1   Selecting an Interact Softphone Audio Device

Interact Softphone allows the user's Windows PC to function as a phone. With that capability, the user can use the existing PC audio devices, or they can add headsets, microphones, and speakers that are compatible with their PC and attached through USB (recommended) or Bluetooth.

To select an audio device or ringtone:

1. Click the speaker icon in the Status Bar (🔊).

2. Click the drop-down arrow to select the appropriate *Microphone*, *Speaker*, or *Ringtone*.

3. Click **Test** to try out the selection.

4. Click **Stop** to end the test.
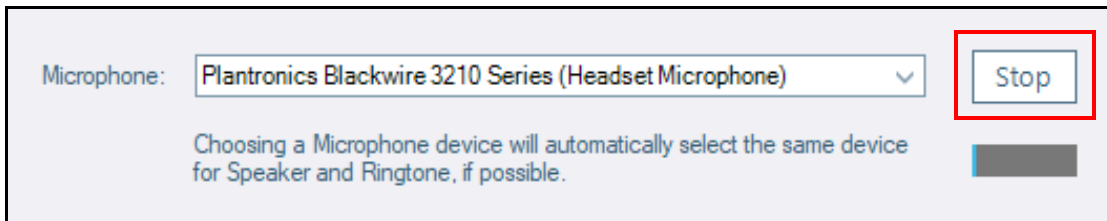
5.4   Recording a Call

The call recording feature allows users to start, pause, resume, and stop the recording of the current, active call (including conference calls). During the active call the user interface provides a status indicator by showing a red dot in the *Current Calls* pane listing.

Call Recording Indicator

The Allworx administrator must enable the Call Recording feature for the user. Programmable Function Keys (PFK) can be defined on the Allworx desk phone for Interact Professional. Interact Softphone has call recording enabled by default without defining it as a programmable function.

Allworx desk phones support the call recording instances listed in the following table.

	Call Recording Limited to Non-Conference Calls	Call Recording a three-way conference call	Call Supervision	Call Recording a four-way conference call
9202E phone		✓	✓	

	Call Recording Limited to Non-Conference Calls	Call Recording a three-way conference call	Call Supervision	Call Recording a four-way conference call
9204 phone		✓	✓	
9212 phone	✓			
9224 phone	✓			
Verge series		✓	✓	✓
Interact Softphone		✓	✓	✓

The call recording features in the expanded user interface window include the following actions for both Interact Professional and Interact Softphone:

- Recording automatically pauses when the user places a call on hold. Recording automatically resumes when the user resumes the call.

- Recording automatically stops when parking, transferring, or ending a call.

- Users can manually pause and resume recording for any active call from the Status Bar.

  Note: When resuming a previously paused recording, this feature inserts a beep/tone into the recording as a marker and displays a recording indicator.

- Both applications stop call recording when using a Shared Call Appearance to place the call on a public or bridged hold. A shared call appearance private hold request works the same as a regular appearance.

The *Record All* feature can be set by the Allworx Server Administrator using the Allworx System Administration web page and when the user navigates to **Options** > **Recording** in the settings (⚙) drop-down list. This feature automatically captures call recording audio files for all calls from the time the Interact Professional or Interact Softphone user answers the call or launches the application. While the *Record All* feature is active, the recording features – pause/resume/stop – are available as usual. If there are no available audio channels for recording, both applications display a pop-up message. When launching either application during an active call with the *Record All* option enabled, the application inserts three beeps to signal the start of the call recording and there was previously unrecorded information from the phone call.

During a phone-hosted conference call, each active call has its own recording file. The recording feature stops when ending an active call within the conference call or when ending the entire conference call. To change the Call Recording File Location, Record All capability, or Volume see "Recording" on page 50.

To record an active call:

Option	Description
Start (⬤)	Begins recording the conversation. **To start the recording:** • Click the start action icon in the top left corner of the Device Status area of the main window. or • Navigate to **Current Calls** > **More** > **Start Recording**.
Pause (⏸)	Temporarily stops the recording. The icon changes to the resume recording action icon, and the applications interrupt recording the conversation. **To pause the recording:** Click the pause action icon in the top left corner of the Device Status area of the main window.
Resume (▶)	Restarts recording the conversation. The icon changes to the pause recording action icon, and the applications start recording the conversation. **To resume the recording:** Click the action icon in the top left corner of the Device Status area of the main window.
Stop (◻)	Ends the recording, and the application saves the file. **To stop the recording:** • Click the action icon in the top left corner of the Device Status area of the main window. or • Navigate to **Current Calls** > **More** > **Stop Recording**. ***Note:*** *For information about how to set the location for storing the recorded audio files, see* [*"Recording" on page 50*](#)*.*

5.5 Placing a Call From a Specific Call Appearance or Line Appearance

The station appearance selected from the status bar drop-down list remains active until another option is selected by the user.

To select the call type for the outbound call:

1. Click the station appearance drop-down arrow to display the list of available options. Click to select the option; that option stays active until a different option is selected.

Option	Description
Default Line (by user name assigned to that appearance)	Place an internal or external phone call.
<other available line appearance>	Place a call using the specific line appearance.
Shared Call Appearance	Place a call using a specific shared call appearance line.

Continued

Option	Description
<Bluetooth enabled device>	Place a call using the *Bluetooth* appearance. Requires the Verge 9312 IP phone.
Intercom	Place an intercom call to Allworx directory contacts only.

2. With the appropriate option selected, place the call by using one of the following actions:

   • Open the *Dialpad* and click each digit to dial the number.

   • Click in the *Dialpad* entry field and use the keyboard to enter the number.
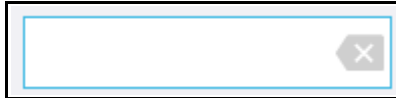
   • Use the dial pad on the Allworx phone when using the Interact Professional user interface.

   • Double-click the appropriate listing in the *Contacts* pane of the Interact Professional user interface window.

   • Double-click the appropriate listing in the *Call History* pane of the Interact Professional user interface window.

3. Click **Call** on the *Dialpad*.

4. Begin talking using the designated Allworx handset, and then click **End Call** when finished.

5.6   Setting the User Presence

The presence icon in the expanded user interface window shows the user contact availability status. A presence other than **In Office** displays the presence status icon for the selected presence. See "Icons" on page 16.

To change the user presence

1. Click the drop-down arrow in the user presence field in the top left corner of the Interact user interface window.

2. Click to select one of the following options from the drop-down list.

   • *In Office*　　　　　• *Busy*　　　　　• *On Business Trip*　　　　　• *At Home*
   • *On Vacation*　　　　• *At a Meeting*　　　• *Away*

5.7   Adjusting Application Settings

The settings icon provides a menu of options to manage the expanded user interface for both Interact Professional and Interact Softphone. Click the settings icon (⚙) to display the drop-down list and then click to select one of following options:

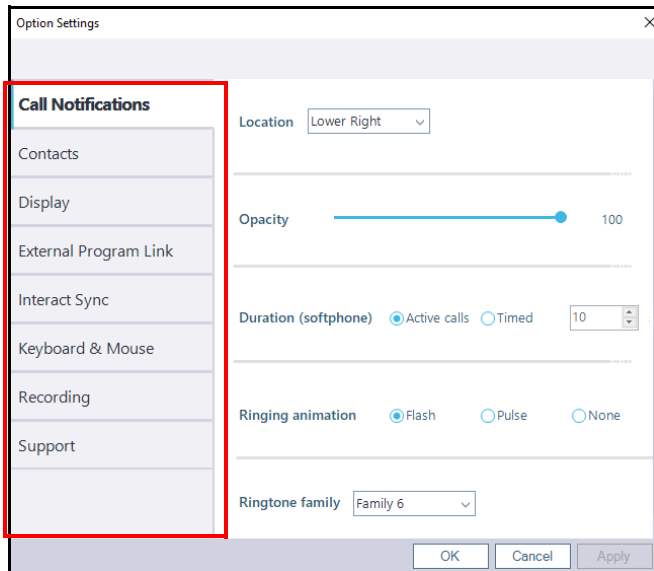| Option	Description
Visible Windows	Change the current window view. Use this setting to show or hide windows. When changing slide-to-hide windows to visible, pinned is the default behavior.
Audio Devices (Interact Softphone mode only)	Opens the *Audio device selection & Volume controls* dialog box. Use the controls in this box to select the audio devices and ringtone to be used with Interact Softphone and adjust the volumes (see "Adjusting Volume Levels and Selecting Audio Devices" on page 34 for more information).
Show Active Call Window / Hide Active Call Window	Display or hides the incoming, active call pop-up window, respectively.
Update Application	Request an upgrade from the portal, if available. Click to begin the update.
Update Interact Sync	Display only if an upgrade is available. Click to begin the update.
Options	Adjust the Call Notifications, Contacts, Display, External Program Link, Interact Sync, Keyboard & Mouse, Recording, and Support (see "Configuring the Application from the Options Menu" on page 39 for more information).
View Emergency Alerts (Interact Softphone mode only)	Click to display the pop-up window with any active Emergency Alerts (see "Receiving Emergency Alerts" on page 30 for more information).
Change password	Update the current Allworx password. See "Changing the Allworx Password or Allworx PIN" on page 11 for more information.
Change PIN	Update the current Allworx PIN. See "Changing the Allworx Password or Allworx PIN" on page 11 for more information.
Reset UI configuration	Reset the application display settings to the factory defaults. Click **OK** to accept the request.
Launch Allworx View	Open the View application in the default web browser window for more detailed statistics about queues, agents, and calls. Manage the View application as defined in the Allworx View Application User's Guide.
Find out more	Link to the Interact Upgrade Options page.
About	Indicate the application version level, copyright, and support contact information.
Logout	Sign the user out of the application; enables a new user to log in the application.
Exit	Close the application.

5.7.1   Configuring the Application from the Options Menu

The *Option Settings* pop-up dialog box is accessed from the settings drop-down list and provides additional configuration features for the all Interact application user interfaces. To open the *Option*

Settings pop-up window:

1. Click the Settings icon (⚙) to display the drop-down list.

2. Click to select **Options**.

3. On the left side of the *Option Settings* pop-up dialog box click a tab to select the option to set.

4. After configuring the option, click one of the following actions:

Action	Description
OK	Save the changes and close the *Option Settings* pop-up window.
Cancel	Disregard the requested changes.
Apply	Save the changes and allow the user to continue customizing the Interact application.

5.7.1.1   Call Notifications

From this tab adjust the preferences for the behavior of incoming call notifications.

Preference	Description
Location	Position of the pop-up notification window on the computer screen. Options include: • *Lower Right* (default) • *Upper Left* • *Lower Left* • *Center* • *Upper Right*
Opacity	Move the slider bar to adjust the pop-up notification window transparency.
Duration	The length of time the pop-up notification window displays. Options: • *Active calls* - When selected, the notification stays open for the entire length of the active call. • *Timed* - When selected, the amount of time in seconds for the notification to remain open must also be selected in the adjacent field. (Default is 10 seconds)

Preference	Description
Ringing Animation	Behavior of the BLF appearance during an incoming call in the Contacts window. Options: include: *Flash* (default), *Pulse*, and *None*.
Ringtone family	The Ringtone family assigned to the call notification. Select from the drop-down list.

5.7.1.2   Contacts

Use this option to set the user's image, manage the personal contacts from external sources, and import or export personal contacts.

| Option	Description
My Allworx directory image	
Select an image to store on the Allworx server and associate with your Allworx User Contact entry. This is the image that other Allworx users see associated with your caller ID name/number in the directory listing.	
Change the image	Opens a file explorer dialog box. Navigate to the directory that contains the desired image, click to select it, and then click **Open** to add the image. *Notes*: • *This option is not available if the Allworx Server Administrator has disabled the permission for the Allworx user to manage the contact image.* • *The Allworx Server Administrator can delete an Allworx User's directory contact image.*
Clear the image	Removes the image file and returns the avatar to the contact silhouette.
Outlook Integration	
Select whether to have Interact retrieve contact information from Outlook.	
Enabled or **Disable**	Indicates the current selected option. Click to select **Enable** or **Disable** to change the option. • If enabled, the Interact application communicates with the Outlook application to monitor Personal Contacts for availability in the Interact Professional user interface.
Enabled or **Disable** (continued)	• If disabled, the Interact applications remove Outlook Personal Contacts from the *Contacts* list. Additionally, the Interact Professional user interface does not share the Personal Contacts with other Allworx devices and applications.
Contact Accounts	
The Interact Professional user interface can display Personal Contacts on all assigned Allworx applications and devices.	
Accounts on this device	Display local contact locations. • If the account settings have not been set, click **Choose.** • If the account settings are set, click **Edit** to open the Edit account details dialog box. Select one of the available options to change the contact management or click **Forget account** to remove the contacts. *Continued*

Option	Description
Accounts on other devices	Display contact locations synchronized from other Allworx devices. • If the account settings have not been set, click **Choose.** • If the account settings are set, click **Edit** to open the _Edit account details_ dialog box. Select one of the available options to change the contact management or click **Forget account** to remove the contacts.

Import / export personal contacts

Users can import contacts from a CSV or vCard file into the Personal Contacts of the Interact Professional user interface which are stored on the Allworx server. Users can also export the personal contacts to a file for backup purposes or to import into another application.

Import from file	Prior to performing this option: create, save, and close a .CSV file with the following fields: **Required** • Description OR Last Name • One phone number **Optional** • First name • Login • Middle name • DID DNIS Name • DID Prompt Language 1. Selecting this option opens a file explorer dialog box. Navigate to the file location, and click **Open**. 2. Use the drop-down lists to select how to map the columns in the CSV file to the contact fields. If the .CSV file contains column headings, verify the **First row contains column headers** is checked. 3. Click **OK**. A confirmation dialog box appears. Click **OK** to close it, and then click **OK** to close to the *Option Settings* dialog box.
Export to CSV file or **Export to vCard file**	Opens a fire explorer dialog box. Navigate to the folder to store the file, and then enter a File name in the field. Click **Save**. The Successful export operation dialog box opens and indicates the number of exported contacts. Click **OK**.
Refresh contacts	Click to update the *Contacts* pane in the Interact Professional and Interact Softphone user interface.

After managing the My Allworx directory image or the Personal contacts from external sources, click **Apply**. After all configuration changes are complete, click **OK**.

5.7.1.3   Display

From this tab choose a color theme for the Interact application user interface by selecting the appropriate radio button. There are two display options available.
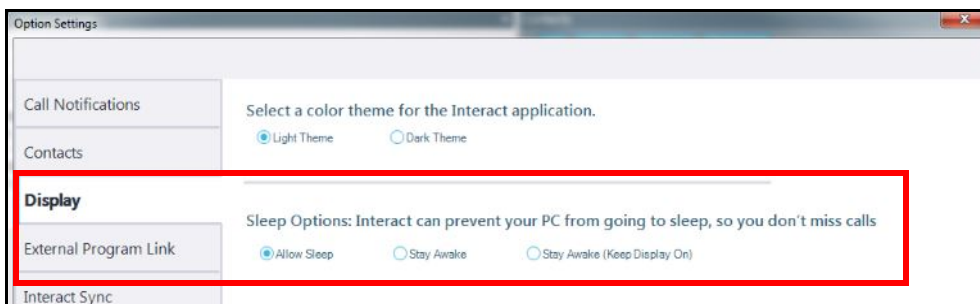
- *Light Theme*
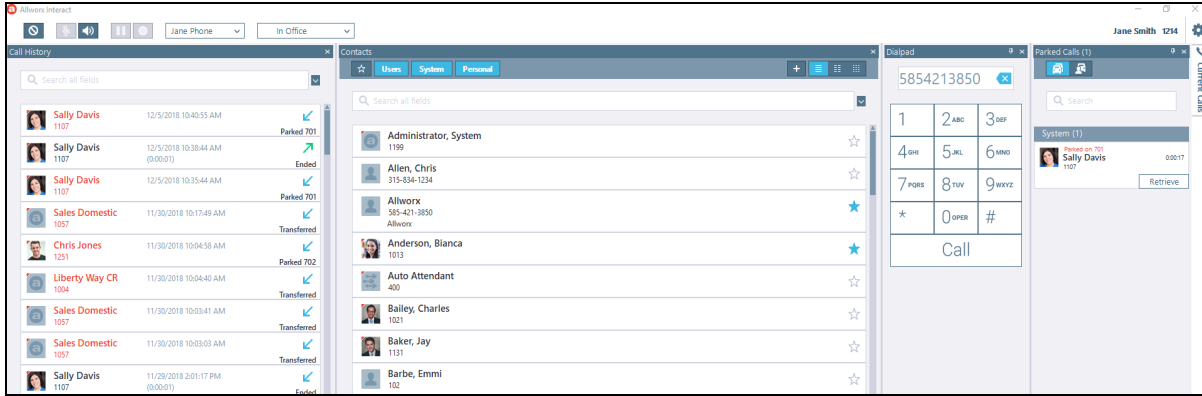
- *Dark Theme*
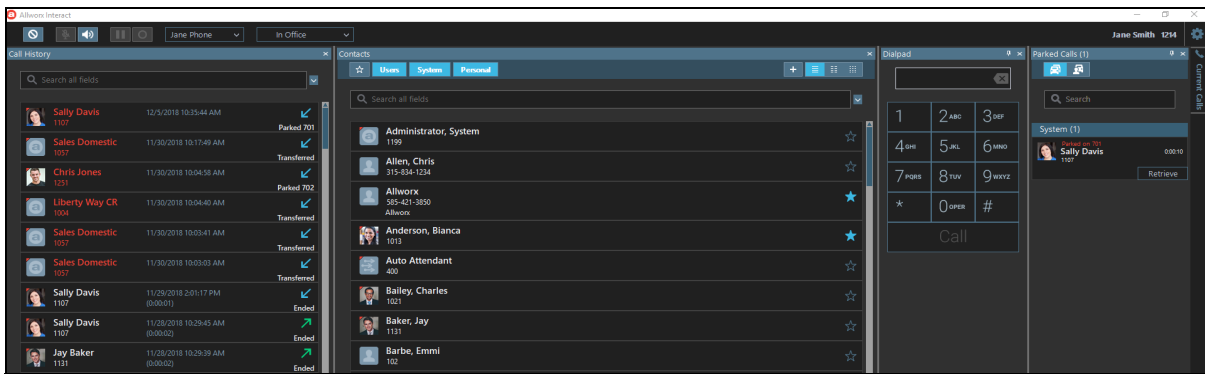
The *Display* tab also provides *Sleep Options*. Click the radio button to select one of these options:

- *Allow Sleep*

- *Stay Awake*

- *Stay Awake (Keep Display On)*

Preventing the PC from going to sleep keeps users from missing calls.

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5.7.1.4 External Program Link

Use this option to tie the Allworx phone system into a business work flow. Specify one or more actions for the Interact software to perform whenever certain phone system events occur and manage existing actions to new requirements. Click **Add a new rule** to get started.

Rule 1	
Rule name	Enter the name of the rule in the field provided. The Rule 1 heading changes to match the entered description.
Action to perform	
Type of action	1. Select an option using the radio button: • URL - See <u>"To use External Program Link - URL option:" on page 45</u>. • command line - See <u>"To use External Program Link - CMD Shell option:" on page 46</u>. 2. Enter the URL or command line executable.
Macros	Shortcut to include in the command line executable. Options: Click the drop-down arrow and select an option. Click **Insert selected macro** to add to the Command to execute section. Options include: • %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) • Only inserts COMPANY when the CALLNUM finds a matching contact in the personal contacts and the matching contact has a company assigned. • Automatically appends CALLNUM to the end of an API string with no macros. • Only inserts DNISNUM and DNISNAME values when available, otherwise the application inserts a blank.
Macro Expansion Options	Click the arrow to view the drop-down list. • Prepend home area code to local numbers: Allworx System Software Version 7.7 or lower
	Verify the Home Area Code is available in the Dialing Plan. If there is no Home Area code, enter the home area code.
	Allworx System Software Version 8.0
	Verify the Home Area Code is in the Dialing Plan. • If a Home Area Code is unavailable, enter the home area code. • If a Home Area Code is available, locate the **Prepend the area code <area code configured on the server> to all local numbers** line and check the box.
	• Strip the external dialing prefix from all phone numbers - Check to select, uncheck to deselect. • Strip the country code from all phone numbers - Check to select, uncheck to deselect.
When to perform this action	Check the box to enable the requirement when performing the command. Options include: • Perform on inbound calls • Perform on outbound calls • Only execute if a call is answered • Only execute if a caller is not in the contact list • Do not execute for internal calls
Select appearances (Advanced)	Check the box to select the appearances to use the defined rule. Click **OK** to save the request.

Continued

Add a new rule	Add a another rule to the External Program Link. Follow the options above to enter the required information in the fields provided. Remember users can: • add as many rules as necessary. There is no number limit to adding rules. • rename the rule without affecting the rule behavior. • reorder the rules for processing purposes. • use the Copy button to duplicate an existing rule, and then edit the rule separately. • delete rules. The application processes the rules in the listed order and applies all rules on any given call asynchronously. If a call triggers multiple rules, it is possible that the application executes multiple (or all) rules simultaneously.
Problem solving	
Try an example for Rule 1	Display a sample contact and URL based on the information provided in the Command to Execute section.
Test this action now	Click to verify that the command is valid.
Action history	Click the drop-down arrow to display the list of recently performed commands.

To use External Program Link - URL option:

1. In a separate browser window launch the third-party 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 Interact Professional user interface.

2. Highlight and copy (**Ctrl + C**) the URL from the browser window.

   Example: Sales Force application Advanced Search using a phone number. **www.salesforce.com/ search/SearchResults?searchType=2&str=5854210000&search=Search&sen=0**.

3. Navigate to the Interact Professional user interface and paste the URL in the *Action to perform* field (**Ctrl + V**).

4. Replace the macro information (phone number in this example) by highlighting the information within the pasted URL, locate the *Macros* line, and select the correct macro key from the drop-down list. Click **Insert** to replace the highlighted portion of the URL with the macro.

   Example: The section in bold in the following URL is the inserted macro for this example:

   www.salesforce.com/search/ SearchResults?searchType=2&str=**%CALLNUM%**&search=Search&sen=0

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

To use External Program Link - CMD Shell option:

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>
```

5.7.1.5   Interact Sync

Use these settings to configure the Interact Sync plug-in to call a Skype for Business contact and adjust the presence settings.

Click-to-dial options

Contacts in Skype for Business can have up to four associated phone numbers. This section configures the phone number to use.

Always prompt me for the number to dial	Requires selecting the contact phone number after selecting the Allworx Dial... option.
Automatically dial the following number (when possible)	After selecting the contact, Interact Professional automatically dials the phone number. Select which number to automatically dial: • Work Phone • Mobile Phone • Home Phone • Other

Presence Synchronization Options

Configure the ways the Skype for Business Availability along with Outlook appointments can affect the Allworx Presence and phone Do Not Disturb setting. To manage each setting, check the **Enabled** check box to the right of the heading.

Availability and phone calls

Check the box to enable automatically updating the Skype for Business Availability when using the Allworx phone. After the call ends, the Availability status returns to the previous setting.

When I'm using my Allworx phone, modify my Availability to	Select from the following options: • Available • In a call • In a conference call • Be right back • Busy • In a meeting • Do Not Disturb • Away

Availability and Allworx Presence

Check the box to enable automatically updating the Skype for Business Availability setting with the Allworx presence setting and vice-versa. Additionally, scheduled meetings on the Outlook calendar update the Skype for Business application, which updates the Interact Professional application. After customizing the settings, the Skype for Business and the Interact Professional applications synchronize the Allworx presence and Availability settings.

Continued

On initial link-up:	Select from the following options: • Copy my Availability to my Allworx Presence • Copy my Allworx Presence to my Availability
*When I am in a call in my Skype for Business application and my Availability changes to **In a call**:*	Select from the following options: • Do not change my Allworx Presence • Change my Allworx Presence to: • Away • At A Meeting • Busy
*When my PC is idle for a prolonged period of time (typically 10 minutes) and my Availability changes to **Away**:*	Select from the following options: • Do not change my Allworx Presence • Change my Allworx Presence to: • Away • Busy
*When I lock my PC and my Availability changes to **Away**:*	Select from the following options: • Do not change my Allworx Presence • Change my Allworx Presence to: • Away • At Home • Busy • At A Meeting

Availability and phone DND setting

Check the box to enable automatically updating the Skype for Business Availability using the Allworx phone Do Not Disturb setting. When setting the Allworx phone to Do Not Disturb (DND), the Interact Sync changes the Skype for Business Availability to Do Not Disturb as well.

On initial Link-up:	Select from the following options: • Copy my Availability to my phone DND setting • Copy the DND setting from my phone to my Availability
*When I lock my PC and my Availability changes to **Away**:*	Select from the following options: • Do not change the DND setting on my phone • Enable DND on my phone

Appointments and Allworx Presence

Check the box to enable automatically updating the Allworx Presence based on new Outlook calendar appointments.

Default Presence for calendar appointments	Select from the following options:
	
	  • *Unmodified* • *On Vacation* • *At a Meeting*
	  • *"Show As" based (Outlook feature)* • *At Home* • *Away*
	  • *In Office* • *On Business Trip* • *Busy*

Do not modify my Presence for appointments with a "Show As: value of:	• *Free* • *Tentative*

Continued

Default Presence for calendar appointments	Select from the following options:

Select from the following options:

- *Unmodified*
- *"Show As" based (Outlook feature)*
- *In Office*
- *On Vacation*
- *At Home*
- *On Business Trip*
- *At a Meeting*
- *Away*
- *Busy*

Override options	Temporarily disable synchronization between the Microsoft applications and Allworx Presence. Locate **Ignore Availability changes when I manually set my Presence to:,** and then select the applicable option: • *On Vacation* • *On Business Trip* • *At Home*
Presence change log	Display a running log of recent changes to the Allworx Presence and DND for debugging purposes.

5.7.1.6   Keyboard & Mouse

From this tab users can customize keyboard shortcuts for the following application functions:

- Answer Incoming Call

- End Current Call

- Hold Current Call

When entering the shortcut keys, verify that these functions do not conflict with shortcuts used in other applications because the shortcuts defined here will affect the PC globally and will work in all applications; even if Interact is not the primary application in use.

To set a keyboard shortcut:

1. Set the *Enabled* check box for a particular Command.

2. Click on the *Keyboard Shortcut* field for that command and simultaneously hold down the key combination to use.

3. Repeat steps 1 and 2, as necessary, for each phone action.

4. Click one of the following:

Action	Description
OK	Save the changes and close the *Option Settings* window.
Cancel	Disregard the requested changes.
Apply	Save the changes and allow the user to continue customizing the Interact application.

To set the Drag-and-Drop behavior for current calls:

Users can configure the application display to highlight colored targets to indicate the supported drag-and-drop actions. Click one of the available radio buttons to select the drag-and-drop behavior:

- **Use legacy drag-and-drop behavior**: Drag a call from the *Current Calls* pane to the *Contacts* or *Call History* pane using the:

    - Left mouse button to perform a Blind Transfer

    - Right mouse button to select an operation from a pop-up menu

- **Use drop targets**: Drag a call from the *Current Calls* pane to the *Contacts* or *Call History* pane. Each contact displays one or more colored targets indicating the supported drag-and-drop operations onto the target.

While dragging a call, Allworx users can press and hold a key on the keyboard to limit the selection of drop targets by entering a filter key (alpha characters only) in the fields provided:

Behavior Description	Default Keyboard Shortcut
Blind Transfer	Win + Shift + B
Attended Transfer	Win + Shift + A
To VM	Win + Shift + V
Park To	Win + Shift + P

Drag-and-Drop Target Examples

Attended Transfer
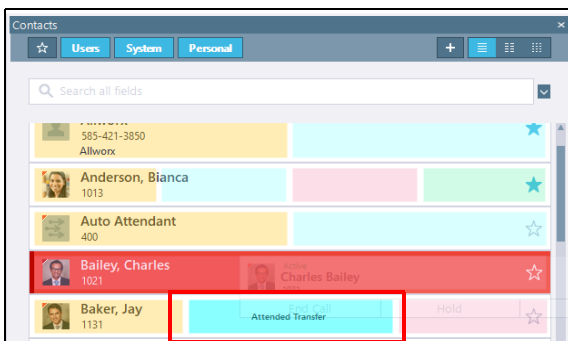
To VM

5.7.1.7   Recording

From this tab users can specify the storage folder for call recordings, manage the *Record All* feature, and set the recording volume level.

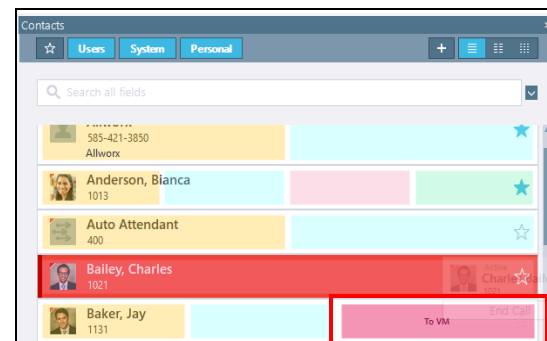| Setting	Description
Folder to store recordings in	The folder to store the recordings displays. To change the folder location: 1. click **Browse** and navigate to the new location. 2. Click **OK** to set the new destination. The file displays in the folder starting with the username and the date.
Record All	Automatically captures audio files from the time the user answers the call or launches the application during an active call. See "Recording a Call" on page 35 for more information. **Enabled** - Click to select this check box if the user can turn on the *Record All* calls option locally. The default is **Off** (unchecked). **Enabled by Server Administrator** - This check box is selected if the Allworx administrator has turned on the *Record All* option at the Allworx server. Users cannot turn off this setting at the local level. The pause, resume, or stop icons are available.
Record volume	The slider bar adjusts the volume of the recording. Left for a quieter recording and right for a louder recording.

5.7.1.8   Support

This tab provides fields to enter user optional contact information and instructions for contacting Allworx (including the location for saving log zip files).

Users can also select their participation in the Customer Experience Improvement Program that automatically provides feedback to Allworx for enhancements to the Interact application. This program collects information about how people use the product without interruption to the user's phone or computer usage. The information collected helps Allworx to identify feature enhances.

If you choose to participate in the program, the Interact Professional user interface collects statistical information about your system configuration, the performance of some components of the Interact application, and certain events. The Interact application periodically sends that collected information over the Internet for analysis by Allworx developers. If you do not want to participate, click to uncheck the check box.

IMPORTANT: *The uploaded data contains no information that identifies you, your company, or your contacts. There are no surveys to complete; it all happens automatically. If you do not have an Internet connection, the application discards the data. Allworx does not share this information with other companies; only Allworx uses the submitted information, in aggregate form, for the purpose of improving our software for our customers.*

Chapter 6   User Interface Window

Note: The information in this chapter applies only to the expanded user interface window used with Interact Professional and Interact Softphone.

The user interface window displays up to 9 panes of information that can be independently managed and customized. This chapter describes the information contained in each pane and provides instructions on how to implement the associated Interact features.
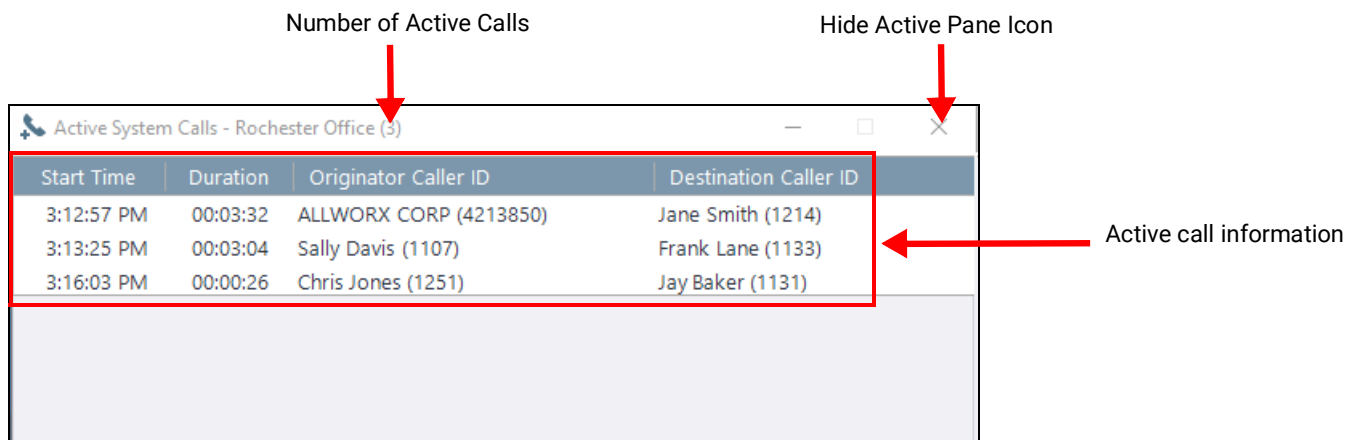
6.1   Active System Calls

Note: Calls on mapped remote handsets do not display in the Active Systems Calls pane.

The *Active System Calls* pane displays internal and external calls with the following information:

Field	Description
Start time	Time of day the call began.
Duration	Amount of time the call connection is active.
Originator Caller ID	Caller ID starting the call.
Destination Caller ID	Caller ID receiving the call.

Click the column heading to sort the information.

To change the *Active System Calls* pane view, contact the Allworx server administrator to update the setting for the User *System-wide Active Calls Display* to one of the following:

Setting	Description
Not Displayed	The window does not display.
Brief Display (no Caller ID)	Both originator and destination caller ID displays as Private
Full Display (with Caller ID)	Caller name and caller ID display.

6.2 Agent: <name>

The *Agent* pane is available to users who are assigned to a call queue and have an ACD Appearance PFK (Allworx desk phone) or Programmable Function (Interact Softphone) assigned. Agents can log in and out of call queues as well as select a busy status using the Interact Professional user interface or the Allworx desk phone. The *Agent* pane automatically updates with that agent's information when changes are made.

Log in/Log out Window with assigned ACD Queues

Login/Logout Queue Badge
Red = no logged in queues
Blue = number of logged in queues

Hide Window Button

Login/Logout

Agent Busy Status
Can change to:
- Idle -> Busy
- Busy -> Busy
- Wrap-Up -> Busy
- Wrap-Up -> Idle

Agent Selectable Status

Hover over Login/Logout button to see logged in queues.
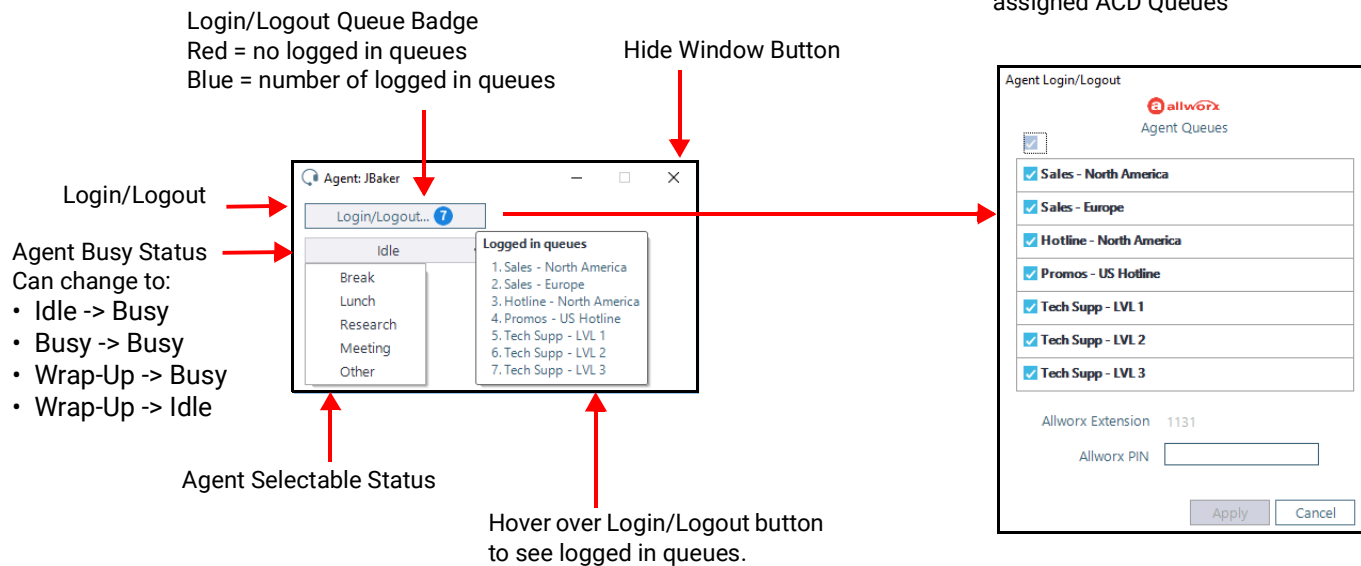
To log in or log out of a call queue:

1. Click **Login/Logout**. The *Agent Login/Logout* dialog box appears and displays a list of assigned call queues.

2. Click to check or uncheck the box to select the call queue(s) to log in to or log out of, respectively.

3. Click in the *Allworx PIN* field and enter the assigned Allworx PIN.

4. Click **Apply**.

   After logging into one or more call queues, the Login/Logout button displays a blue badge. The badge indicates how many call queues the agent logged in to. A red badge with the number 0 displays when the agent logs out of all call queues. To see the queues the agent is logged in to, hover the cursor over the badge on the Login/Logout button. A red flag next to the *Allworx PIN* field indicates an invalid PIN number.

To set or clear the agent status:

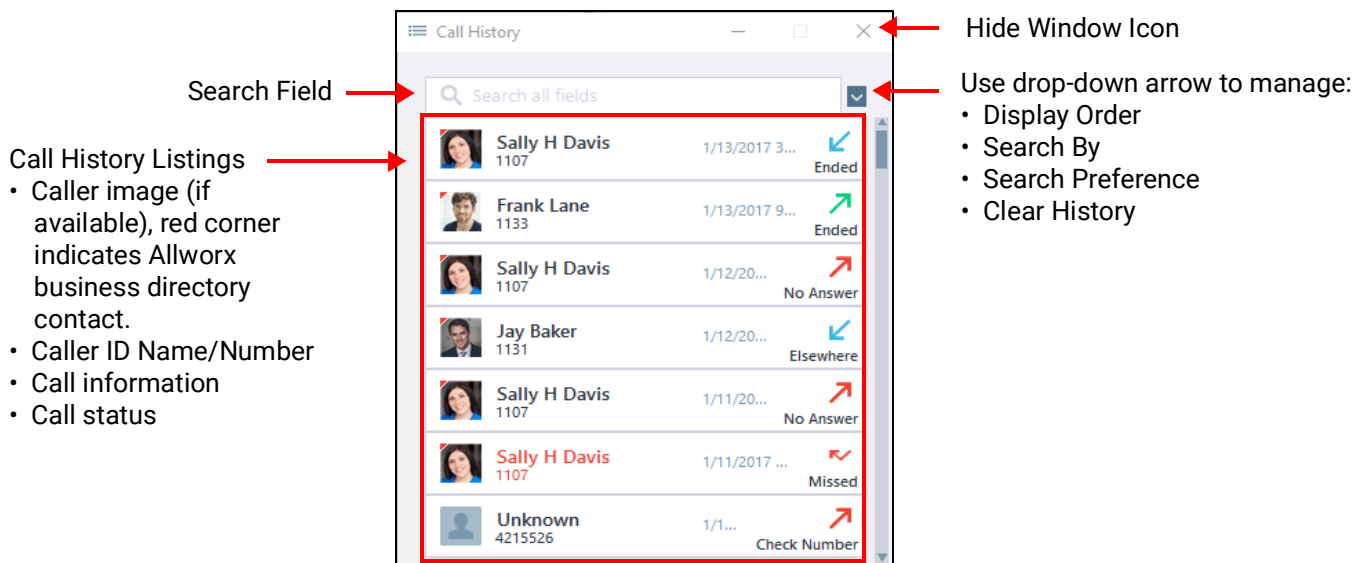After logging in to one or more call queues an agent can set the agent status to *Busy* or *Idle*.

Note: The Interact agent cannot change the following Busy States: Ringing, Call on Hold, Administration Functions, and On Call.

Click the button displaying the agent status and select the new agent status option from the drop-down list.

6.3   Call History

The *Call History* pane loads the user's call history when first opening the application and then continues to provide a listing of the current call history size. For Interact Professional, Verge IP phones support 200 entries / 92xx IP phones support 99 entries. For Interact Softphone the maximum number of entries in this pane is 200. The pane updates with each call and deletes the oldest *Call History* entry as the application adds new entries to the list.

Call History listings include: the caller ID (red text indicates a missed call), date/time of the call, and status icons. If minimizing the *Call History* pane so that only the contact image and caller ID name/number display, hover over the listing to see start date/time and duration of the call. Use this pane to place a call, search, change the display order, or clear the call history list.

Search Field

Call History Listings
- Caller image (if available), red corner indicates Allworx business directory contact.
- Caller ID Name/Number
- Call information
- Call status

Hide Window Icon

Use drop-down arrow to manage:
- Display Order
- Search By
- Search Preference
- Clear History

Call Status	Description	
Transferred	Call forwarded to another recipient	
Ended	Normal call ended	
Parked <orbit number>	Call placed into a Parking Orbit	
Parked <extension>	Call parked to a specific extension	
No Answer	Outbound call that is not answered (internal calls only).	*Continued*

Call Status	Description
Missed	Inbound call that rings, but it is not answered.
Check Number	Failed to route to an outbound call
Elsewhere	Missed inbound, picked up somewhere else, i.e., Reach Device

To manage the *Call History* listings:

1. Locate the *Call History* listing and right-click on that listing.

2. Select an option from the drop-down list:

Option	Description
Intercom	Place an Intercom call to the listing.
Dial	Place a call to that listing. Shortcut: double-click that listing.
Add to Contacts	Open the *Edit contact details* dialog box. • Enter or update the information. • Click **OK** to add the information as a Personal Contact.
Delete entry	Clear that specific listing from the *Call History* pane.
Delete all	Clear the entire list from the *Call History* window. Click **Yes** in the confirmation dialog box to perform this action.
Details	View the *Call History* listing details - *call date/time*, *caller/contact ID and number*, *call duration*, and *network statistics*. Select one of the following actions after opening the *Call History Details* dialog box: <table><tr><th>Action</th><th>Description</th></tr><tr><td>**OK**</td><td>Close the *Call History Details* dialog box.</td></tr><tr><td>**Add to Contacts**</td><td>Opens the *Edit contact details* dialog box. Enter or update the information and click **OK** to add the information as a Personal Contact.</td></tr><tr><td>**Delete entry**</td><td>Removes the listing from the *Call History* pane.</td></tr></table>

To complete a search within the *Call History* pane:

Provide criteria in the search field to locate a specific call history listing.

1. (optional) Click the drop-down arrow next to the search field (indicated by the 🔍 icon) to select one of the following search preferences.

Preference	Description	
All Fields (Default)	Display listings with any field matching the search criteria.	
Full name	Display the caller ID names matching the search criteria.	*Continued*

Preference	Description
Number	Display the caller ID numbers matching the search criteria.
Date/Time	Display listings with a date/time stamp matching the search criteria.

2. Enter the search criteria in the field. The application automatically displays the call listings that match the search field information in the *Call History* pane.

To clear the search field criteria, click the **X** that appears at the right end of the field.

To change the *Call History* pane display order:

Select how the *Call History* pane displays the listings.

1. Click the drop-down arrow next to the *Search* field and select **Display Order** from the menu.

2. Select the preference. The *Call History* pane updates the view according to the selection.

Option	Description
Name	Display the Call History listing by caller ID name.
Number	Display the Call History listing by caller ID number.
Time	Display the Call History listing with the most recent call on top. (Default setting)

To clear all calls in the *Call History*:

1. Locate the *Call History* pane.

2. Click the drop-down arrow next to the magnifying glass (🔍).

3. Select **Clear History** from the list.

Note: *Performing a Clear History also clears the Handset Call History.*

6.4   Contacts

The Allworx System supports four types of contacts on the Allworx® Verge™ IP phone series and on Interact Softphone handsets:

- **User and System contacts** – These contacts have an internal Allworx extension assigned and are managed by the Allworx Server Administrator.
- **Public Contacts** – These are system-wide contacts (formerly known as Speed Dial (for Verge phones) and are managed by the Allworx Server Administrator.
- **Personal Contacts** – These contacts are managed by the Allworx user and are only available on Allworx systems with a Connect server.
  - *Allworx Personal Contacts*
    - Created from the Verge IP phone, the Interact application, or a Reach device contact application.

- Imported from a .CSV file or vCard within the Interact Professional user interface.
- *External Personal Contacts*
  - Synchronized from a Reach device originating application (device app such as Contacts or People)
  - Synchronized from an account such as a Gmail or Outlook email account.

Visual example of Contacts:

6.4.1   Sharing Contacts

The Allworx system shares the User, System, and Public contact types with all of the Allworx user's connected Allworx phones, Reach devices, and the Interact application modes. Within the Reach and Interact application modes, Allworx users control sharing and synchronizing Personal Contacts with the devices assigned to that Allworx user.

Notes:

- *The Allworx Connect server is not a contact manager for Personal Contacts. Example: If a Personal Contact is available in the Reach device app (i.e. Contacts) and the same Personal Contact is available in the user's email account (e.g. Gmail), the Personal Contact displays twice when viewing the contacts.*

- *The expanded Interact user interface only exports contacts added from within an Allworx application.*

- *For Interact Professional, the Verge 9304 IP Phone fully supports Allworx User, System, and Public contacts while having limited Personal Contact support. Allworx users can add up to 100 Allworx Personal Contacts that are only available with that phone - not with other Allworx phones and applications (including when using the Hot Desk feature).*

- *Interact Professional offers full contact support on all phones connected to a Connect server. Certain phones (like the Verge 9304 IP Phone, or older Allworx 92xx phone models) have limited contact support within the phone (these phones do not automatically match contacts synchronized from Reach or Interact applications), but the Interact Professional application mode offers full contact support even when used with those phones.*

Visual example of sharing contacts using a Connect server:
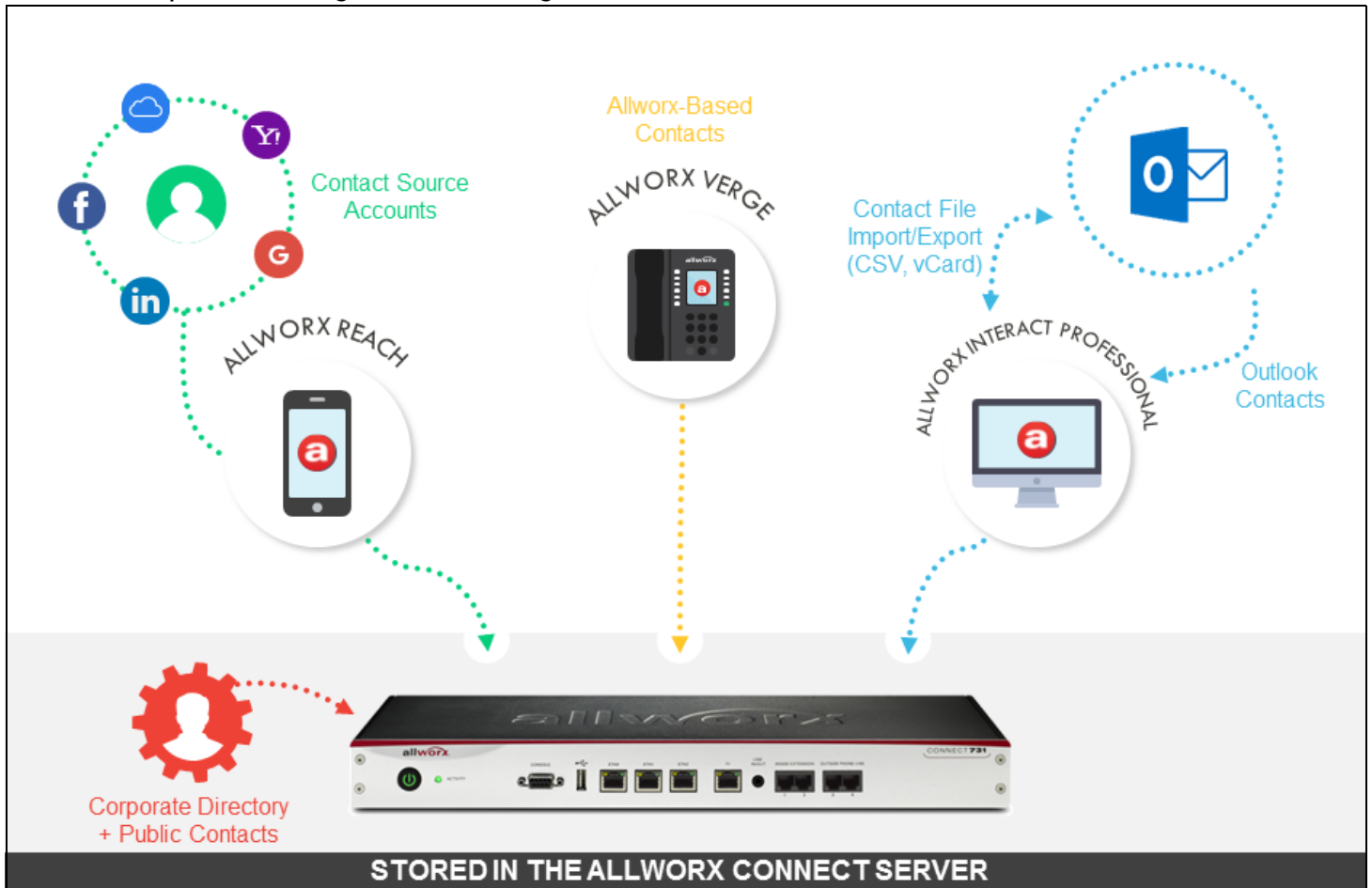
6.4.2 Contact Privacy

Allworx users control sharing and synchronizing the Personal Contacts to the devices assigned to the user by clicking the Settings icon (⚙) and navigating to the **Options** > **Contacts** dialog box:

- Choose which contact source accounts (e.g. Outlook) to share with your Allworx devices and applications.

- Disconnect a contact source account from other Reach devices.

6.4.3   Data Protection

Only the Allworx user has access to their Personal Contacts; the Allworx Server Administrator cannot access the user's Personal Contacts. Allworx Interact Professional users can prevent others from seeing the personal contacts on their Verge IP phone by restricting access. This requires the Allworx PIN to unlock the Verge IP phone.

6.4.4   Managing Personal Contacts

Allworx users can manage and update Personal Contacts by using the originating device or external application (e.g. Microsoft Outlook, Gmail). Only the Allworx user can add, edit, or delete each Personal Contact. However, Allworx Server Administrators can delete all of a user's personal contacts from the Connect server permanently, but cannot limit an individual user's number of Personal Contacts stored on a Connect server.

Note: The Reach application allows users to update an External Personal Contact IF the email account (e.g., Gmail) used to create the contact is available on the Reach mobile device. However, the Reach application does not allow users to update External Personal Contacts synchronized from the Interact Professional user interface using Outlook email.

Example:

Jane Smith needs to update her Personal Contact, Tom Wright. Because Jane uses the Verge IP phone, Reach for iOS, and the Interact Professional application with Softphone, she needs to determine how she added Tom to her Personal Contacts. Within the Interact Professional user interface, Jane opens the *Contact* pane and scrolls to find Tom Wright. Jane hovers the mouse over Tom and locates the Account and Devices lines to learn how she added Tom to her Personal Contacts.
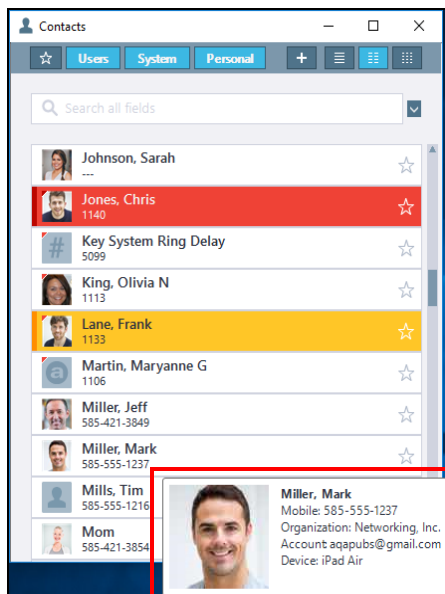
If the Account line reads:

- **Allworx Personal**: Jane added Tom Wright using her Verge IP phone, Reach device, or Interact application. To update the contact information about Tom, Jane can use her Verge IP phone, the Reach application or the Interact (Professional) application. *Example:* Allworx Personal

- **Allworx User, Allworx System, Allworx Public*** – The Allworx Server Administrator manages these contacts using the Allworx System software. *Example:* Allworx Users

- **Source account:** Jane used Reach or Interact to synchronize her contacts with her Verge IP phone. There are three synchronized contact labels that may display:

  - **Email account:** Jane used the Reach application to synchronize her contacts from her email account (such as Gmail). To update the contact information about Tom, Jane must do so in her contacts application. Example: username@gmail.com

  - **Reach device:** Jane used an iOS or Android app (such as Contacts) to manage her contacts stored on her device, but the contacts are not associated with a third party service. To update the contact information about Tom, Jane must do so on the identified device in the appropriate Contacts app on the device synchronizing with the Allworx System.

    Note: Reach for iOS version 11 or higher will look like these contact types due to iOS 11 restrictions. Example: <Samsung SM-T530NU>.

  - **Outlook account:** Jane used the Interact Professional application to synchronize her contacts from her Outlook account. To update the contact information about Tom, Jane must do so in her Outlook application. **Example: Outlook:\\PersonalFolders\Contacts**.

* The only user-editable options for these contacts types are the **Favorite** status and the choice of default phone number on the Verge IP phone, Reach application or Interact application.

6.4.5 Contact Pane Overview

Use this pane to view or group the contacts, designate favorite contacts, add a new Personal Contact, and adjust the view. Expanded Interact user interface users can place calls, search the contacts using specific criteria, and change the display order.

Standard View with High Visibility Display

Hide Pane Icon

Contact Group Tabs

Search Field

System Contact
- Favorite
- Parked call notifications (if available to the user)
- Dial
- Intercom
- Details

User Contact
- Favorite
- Parked call notifications (if available to the user)
- Dial
- Intercom
- Details

View increase or

Add new Personal Contact

Drop-down arrow to select:
- Display Order
- Display Visibility
- Search By
- Search Preference

Personal Contact
- Favorite
- Dial
- Details
- Edit Contact
- Delete Contact

Public Contact
- Contact Avatar
- Allworx Badge
- Contact Name / Number
- Speed Dial / Contact Number
- Favorite

Ultra Condensed with Low Visibility Display
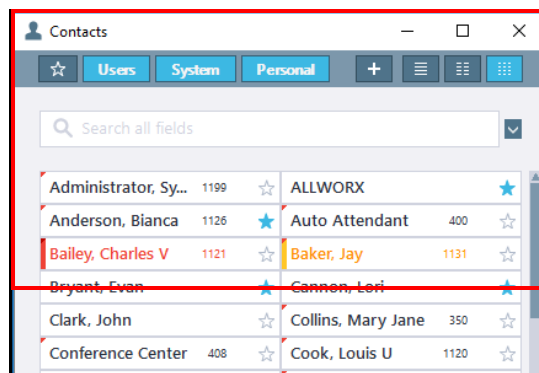
Each contact listing displays a contact image (if available), caller ID name / number, and the favorite status. Personal Contacts display the company name (if available). User Contacts display icons to indicate a presence status for other than *In Office* (see "Icons" on page 16) and an availability status using color-coded BLF status 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.

* If the Allworx User Contact is busy, set the Interact Professional user interface to **Notify when available**. When the Allworx User Contact's extension is available, a pop-up notification displays. See <u>"To place a call using the expanded user interface Call History or Contacts pane:" on page 22</u>.

Hovering over a contact displays a pop-up window with the following information:

User, System, or Public Contact	Personal Contact
• Contact image, if available • Caller ID name and number • Current status / Presence • Call duration (active call only)	• Contact image, if available • Caller ID name and number • Company name, if available • Account - the source account used to create the contact • Device - the device used to create the contact - this field is visible only for contacts imported from Android, iOS, or Outlook.

To change the *Display Visibility* within the *Contacts* pane:

1. Click the drop-down arrow next to the search field and click to select **Display Visibility** from the list.

2. Select the **High Visibility** (highlights the entire User Contact Listing) or **Low Visibility** (changes the User Contact listing text color) radio button.

To use the *Contact* group tabs:

Each group tab adds or removes contact entries from the list. Clicking the group tab toggles the contacts view on and off independently of the other group tabs. The group remains active after closing and reopening the Interact Professional user interface.

Group	Description
Favorites (⭐)	Display only Favorite contacts from business and Microsoft Outlook directories.
User	Display the Allworx contacts assigned to an Allworx desk phone or Interact Softphone.
System	Display the Allworx Call Monitor, Call Queue, Auto Attendant, and System Paging Zones.
Personal	Display the contacts synchronized from a Reach device, a Verge IP phone, or Microsoft Outlook.

To designate favorite contacts:

A blue star (⭐) displays in the contact listing to indicate that the contact is a favorite. To designate or remove a contact as a favorite, click on the star icon in the contact listing or right-click the contact listing and select **Favorite** from the drop-down list.

To add a new Personal Contact:

Users can add new Personal Contacts from the *Contacts* pane.

1. Click the new Contact (+) icon to open the *Edit contact details* dialog box for the new contact.

2. Enter the required information in the fields provided. Click **add phone number** to open another space for an additional phone number to be included in the Contact information. Click **Add an image** to upload an image file from your computer.

3. Click **OK**.

   The new Personal Contact displays in the *Contact* pane.

To edit or delete a Personal Contact:

Users can only edit or delete Personal Contacts that were created from within the Interact application, Reach application, or on a Verge IP phone. Right-click the contact listing in the *Contacts* pane and click to select one of the following actions:

Action	Description
Edit contact	Opens the *Edit contact details* pop-up window. Enter the updated information and click **OK**.
Delete contact	Displays the *Delete a personal contact* pop-up window. Press **Yes** to remove the Allworx Personal Contact. Click **No** to stop the deletion.

To adjust the contact listing display:

Click a view adjustment icon to alter the size of the contact listing density from a single-row to multi-column format. To identify the user status:

Option	Description
High Density	This ultra condensed view displays a single-line entry with the username, phone number, and the favorite status icon in a multi-column format based on the width of the pane.
Medium Density	This standard view displays two lines of information that include the image (if available), name, phone number, and favorite status icon in a multi-column format based on the width of the pane. A Microsoft Outlook contact has three lines of information that includes the company name, if available.
Low Density	This view displays a single column listing of the contacts with the image (if available), name, phone number, company (if available), and favorite status icon.

To place a call:

Right-click on a *Contact* listing and select one of the following options:

Option	Description
Dial	Places a call to that listing. If more than one phone number is available, select a number from the drop-down list.
Intercom	Place an Intercom call to that listing.

To pick-up another user's call from the *Contacts* pane:

For incoming calls, the contact flashes red. Right-click the contact and select **Answer** from the drop-down list to pick-up the call.

To specify the primary number of a personal contact:

1. Right-click the contact listing and select **Details** from the drop-down list.

2. Locate the contact's phone number, and click to select one of the available phone numbers.

3. Click **Done** to save the changes.

To change the *Contacts* pane display order:

When changing the contacts display order, the selection remains active after closing and reopening the application.

1. Click the drop-down arrow next to the search field.

2. Click to select the *Display Order* in the drop-down list.

3. Click the radio button to select one of the following display preferences. The application window updates the view per selection.

Option	Description
First Name	Arrange the contacts by the caller ID first names.
	Example: First name, Last name.
Last Name	Arrange the contacts by the caller ID last names. (Default)
	Example: Last name, First name, Middle name. (Default)
Company Name	Arrange the contacts by the Corporate names (Microsoft Outlook contacts only)
	Example: Company name, Last name, First name
Number	Arrange the contacts by the caller ID number.
	Example: Caller ID number, Last name, First name

To search within the *Contacts* pane:

Note: The selected search preference is still active after closing and reopening the Interact Professional user interface.

1. Type the search criteria in the field. The application returns any contact listing containing the search criteria.

> Q Search all fields

2. (optional) Click the drop-down arrow next to the search field and click to select **Search Preference**.

3. Click to select one of the following preference radio buttons.

Option	Description
Contains	Display the contact listings with any of the search criteria.
Starts with	Display the contact listings that begin with the search criteria.

4. (optional) Click the drop-down arrow next to the search field and click to select **Search By**.

5. Click to select one of the following search by radio buttons.

Option	Description
All Fields (Default)	Display 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 (from Microsoft Outlook only).
Number	Display the caller ID numbers matching the search criteria.

*Note: To clear the search field terms, click the **X** icon that appears in the right side of the field.*

6.5   Current Calls

The *Current Calls* pane displays all active calls and calls on hold for the Allworx desk phone or Interact Softphone connected to the Interact Professional user interface, as well as parked calls for Allworx contacts when the user has enabled Parked Call Notifications for that contact. Additionally, users can place a call on hold, transfer a call, create a conference call, or end the active call from this pane.

The applications automatically search the *Personal Contacts* during a new call and display the contact name if the number matches any of the numbers in the contact number list.

Note: You can close the Interact Professional user interface without affecting the current phone state such as disconnecting the current call.

Number of Current Calls
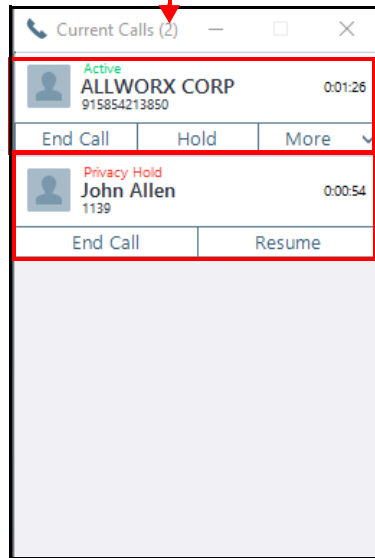
Hide Pane Icon

Line #1 Information
- Caller Image, if available
- Current State
- Caller ID Name
- Dialed Number Identification Service: the telephone number dialed by the caller
- Call Duration
- Call Management Buttons/Drop-down Menu

Line #2 Information
- Caller Image, if available
- Current State
- Caller ID Name
- Caller ID Number
- Call Duration
- Call Management Buttons

To avoid disconnecting a call when answering a second incoming call, it is recommended that your Allworx System Administrator configure your phone's Handset Preference Group to enable *Auto On Hold*, or you can configure your Allworx desk phone as indicated in the following table.

Phone	Phone Navigation
92xx IP Phones	**CONFIG** > **Preferences** > **Auto On Hold**. Select **Enabled** and exit the menu. When prompted to *Save to Flash,* press the **Yes** soft key.
Verge IP phone series	**Settings** > **Phone Preferences** > **Call Handling** > **Auto On Hold**. Select **Enabled**. Press **Back** to return to the *Settings* screen and **Back** again to return to the *Idle* screen.

Call Reminder notifications are available to alert users when calls placed on hold have not been answered. These notifications are defined by the Allworx system administrator in the Handset Preference Group and assigned to the handset using the Allworx System Administrator web page (see the *Allworx System Software Administrator Guide* for information).

When a call is placed on hold, that entry in the *Current Call* pane is highlighted, labeled with the message *Privacy Hold*, and an audible reminder plays at the intervals defined in the Handset Preference Group. When the user resumes the call the intermittent sound stops, the *Current Calls* pane entry is no longer highlighted, and the *Privacy Hold* message disappears.
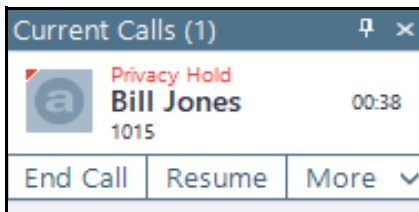
To place a call on hold:

See for more information.

To park a call:

See for more information.

To transfer a call using the expanded Interact user interface
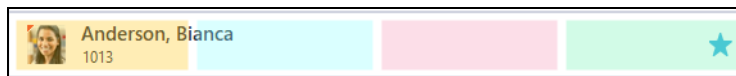
1. Locate the *Current Calls* pane and then the current phone call.

2. Click the *More* drop-down arrow and click to select one of the following transfer options:

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 that user's voicemail. This option only: The call transfers immediately and no longer displays in the *Current Calls* pane.
Transfer to voicemail	Place the call directly to another user's voicemail.
System Park	Place the call in a Parking Orbit. The Parking Orbit number for a short period of time.
Park To	Place the call into a parking location for a specific user or group (if this feature is enabled for users with Allworx System Software 8.5 and higher).

3. Click a listing in the *Contacts, Call History,* or *Current Call* pane or use the *Dialpad.* The call transfers.

Transfer Actions: Use the following actions to quickly transfer calls.

Action	Description
Left click and drag	Perform a blind transfer by moving the call to a listing in the *Call History* or *Contacts* pane. Release the left mouse button to immediately connect the two calls.
	When *Use drop targets* is enabled (default), the call is dragged to the Contact listing in either pane, the listing highlights with several colors. Drag the call to the blue area to complete an *Attended Transfer*, to the yellow area to complete a *Blind Transfer,* to the green area to complete a *Park to*, and the pink area to complete a transfer *To VM* (voicemail).

Continued

Action	Description
Right click a *Call History* listing	Manage a listing in the *Call History* pane by selecting one of the options from the drop-down list: • Dial - Place a call to the selected listing. • Intercom - Place an Intercom call to the selected listing. • Blind Transfer* - Immediately connect the two calls. • Attended Transfer* - Displays a second call listing in the *Current Calls* pane. After the target answers select one of the following options: • Transfer - complete the transfer • Try Again - drop the current Transferee, and the call is available for an Attended Transfer to another listing. • Cancel - drop the current Transferee, and the Transferor is able to route the call as necessary. • VMail Transfer (Allworx Directory only) - place the call directly to the transferee's voice mail box.
Right click a *Contact* listing	Manage a listing in the *Contact* pane by selecting one of the options from the drop-down list: • 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* - immediately connect the two calls. • Attended Transfer* - display a second call listing in the Current Calls window. After the target answers select one of the following options: • Transfer - complete the transfer • Try Again - drop the current Transferee, and the call is available for an Attended Transfer to another listing. • Cancel - drop the current Transferee, and the Transferor is able to route the call as necessary. • VMail Transfer (Allworx Directory only) - place the call directly to the transferee's voice mail box. • Park To - Place the call into a parking location for that contact (if this feature is enabled for the user with Allworx System Software 8.5 and higher). • Details... (Outlook personal directory only) - open the Contact Details window 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.

To create a conference call:

Set up phone-hosted conferences between three parties (3-way conferences).

1. Place the active call on hold.

2. Place or receive a second call; the *Current Calls* pane 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 and the display shows both calls as in conference.

   Note: Placing a call on hold temporarily removes the caller from the conference. To rejoin the conference, repeat step 3.
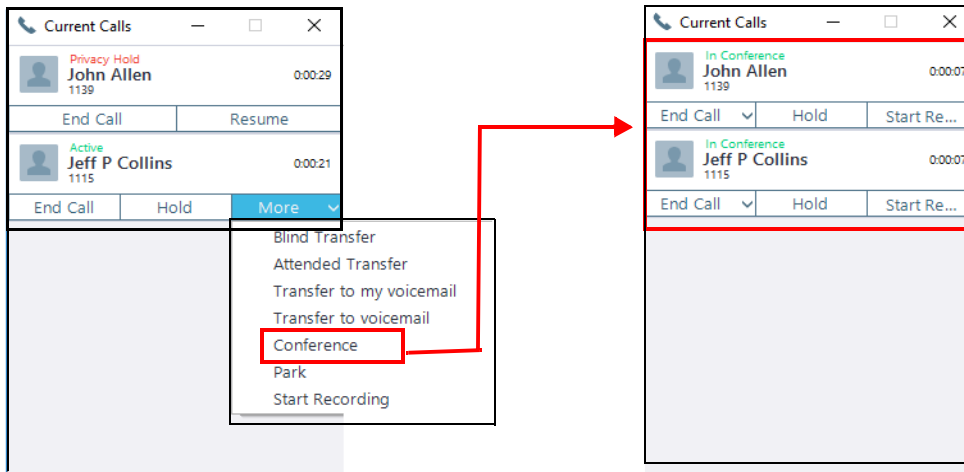

To end a conference call using the Interact Professional user interface:

In the *Current Calls* pane, locate a call segment and click **End Call**. Select one of the following options from the drop-down list:

Option	Description
End This Call	Disconnects the specific active call participating in the conference call, and the active call no longer displays in the *Current Calls* pane. The other active call(s) in the conference remain active, and the *Current Calls* pane remains open.
End Conference	Disconnects all active calls participating in the conference call. The pane closes – unless it is pinned open.
Continue without me	Disconnects the user from the conference call while enabling the other callers to continue their conversation. After selecting the **Continue without me** option, the status of the active calls in the *Current Calls* pane updates to *Calls Connected*, and then the pane closes (unless it is pinned open).
	The Interact Professional application mode does not support this feature on four-way conference calls.

6.6 Dialpad

Use the *Dialpad* pane to place a phone call.
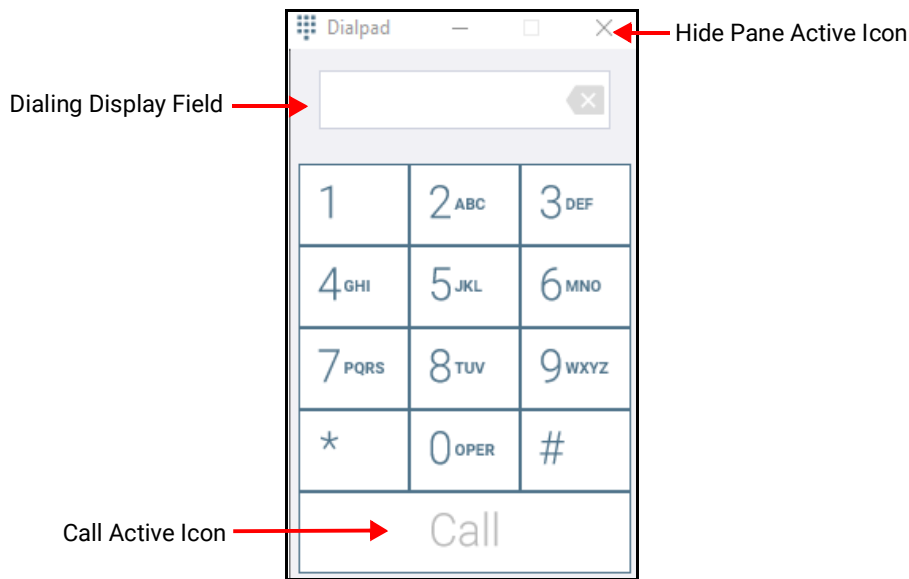
To place a call using the *Dialpad*:

1. Open the expanded Interact user interface *Dialpad* pane.

2. Dial the number using one of the following options:

    *   Dial the internal extension.
    *   Follow the dial plan for an external 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>
    *   Right-click on the *Dialpad* entry field and select one of the drop-down options or use the PC keyboard to enter the numbers
    *   Copy text into the Dialing Display Field using **Ctrl** + **v** or a right-click.

3. Click the *Call* active icon to place the call. The *Dialpad* pane is available to dial additional digits during a call (example: Auto Attendant options or PIN entry for the Message Center) without needing to press the *Call* active icon.

    Shortcut: Double-click the *Call* active icon to redial the last number.

4. When the call is dialed, the *Call* active icon changes to an *End* icon - click that icon to end the current call.
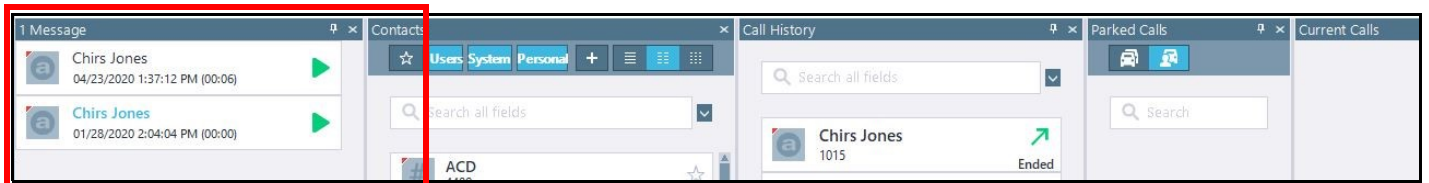
6.7   Messages

Note: This pane is available only when using the Interact Softphone mode.

The *Message* pane alerts users when a new Voicemail message is received. The pane displays both the number of new messages available from within the pane or by dialing the Message Center. The red number icon displays the number of new messages.
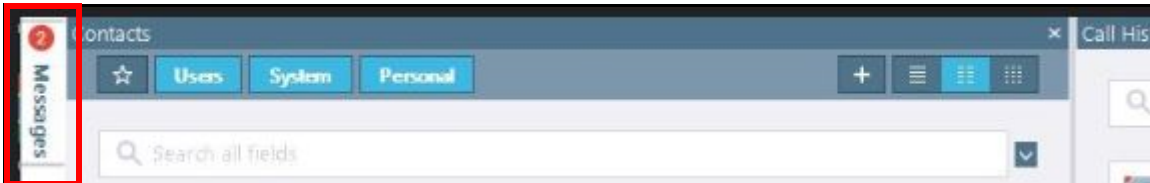
Just like other Interact Softphone panes, the *Messages* tab can be opened and pinned in the user interface. When open, the pane displays a list of messages in a reverse-chronological order with the

Caller ID in bold, and standard play ▶ and stop ■ controls.

Note: New Voicemail message alerts are also displayed in the basic Interact window that displays in the lower right corner of the user's PC.

To listen to Voicemail messages:

1. Click the play icon ▶ to listen to a message.

2. Click the stop icon ■ to end the playback.

3. Right-click on a message to display the drop-down menu.
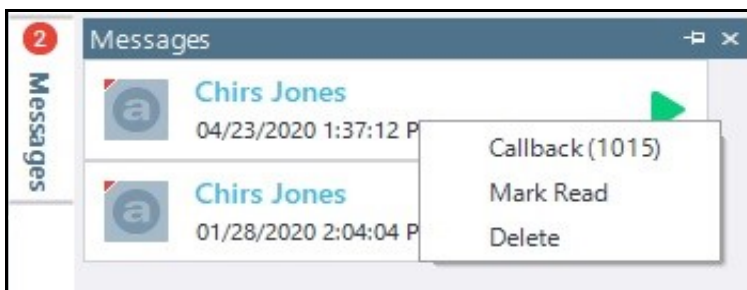
4. Click **Callback** to return the call.

5. Click **Mark Read** to indicate that the message has been read and remove it from the new messages count displayed on the tab.

6. Click **Delete** to remove the message listing from the pane. There is NO warning when deleting a message -- as soon as **Delete** is selected, the message is removed from the pane.

*Note: You can also call the **Message Center** by dialing **404** in the Dialpad pane. Enter the user PIN and use the Dialpad pane to follow the audio prompts to manage messages.The number of messages displayed in the Messages pane is updated based on the user's selections.*

6.8   Outside Lines

The *Outside Lines* pane provides visual indication of which outside phone lines are in use and is only available if the Interact Professional user has an outside line assigned to the handset. Use the *Outside Lines* pane to answer incoming calls, seize a line for outgoing calls, drag-and-drop an external contact or listing from the *Contacts* or *Call History* pane to place a call.

Use this pane to place an call or answer a call.

To place a call:

A red highlighted phone line option indicates that the line is unavailable.

1. Open the *Outside Lines* pane.

2. Select one of the following options:

Option 1	Option 2
1. Click on an available phone line. 2. Locate the *Dialpad* pane. Enter the number and click Call.	1. Locate the *Contacts* or *Call History* pane, and then locate the external contact. 2. Drag and drop the contact to an available line in the Outside Lines pane.

3. Use the *Current Calls* pane to further manage the call.

To answer a call:

1. Open the *Outside Lines* pane.

2. Click the red, blinking phone line.

3. Use the *Current Calls* pane to further manage the call.

6.9 Parked Calls

Place a call in a system-wide hold location so that another phone can retrieve the call. The Allworx System provides two methods to park a call:

- **System Park**: Place a call into the next available park location, and then a different phone can retrieve the call by dialing the park location number.

  Example: Park a call for someone away from their phone, and then page the recipient to tell them to retrieve the call by dialing the parking orbit.

- **Park to Extension**: Place a call into a parking location for a specific user or group, if enabled (available in Allworx System Software 8.5 and higher). Allworx users also receive *Parked Call Notifications*, if someone parked a call on their extension or any extension of interest.

To Park a call when using Allworx System Software 8.5 or higher:

Locate the call in the *Current Calls* pane, and then do one of the following:

- In the *Current Calls* pane, click the *More* drop-arrow, and then select one of the following:

System Park	Place the call into the next available parking location for any Allworx phone to retrieve.
Park To	Place the call into the next available parking location for a specific extension. Use the *Contacts* or *Call History* pane to select the contact number to which the call is parked.

  Note: *The panes display only the Contacts with Park to Extension enabled.*

- Click and drag the current call to the *Parked Calls* pane to one of the following drop targets:

System Park	Place the call into the next available parking location for any Allworx phone to retrieve.
Park To Myself	Place the call into the next available parking orbit for this extension.

- Click and drag the current call to the *Park To* area of the *Contacts* or the *Call History* pane. Contacts with *Park to Extension* enabled display the *Park To* target. To show only parkable extensions, press a filter key (default **P**) while dragging the call.

To park a call when using Allworx System Software 8.4 or lower:

Do one of the following:

- Drag and drop the call listing in the *Current Calls* pane to the *Parked Calls* pane.

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

In any Allworx System Software version, after the Allworx phone parks the call, the *Parked Calls* and the *Current Calls* panes update with the call listing.

To retrieve a parked call:

Locate the call in the *Parked Calls* pane and click **Retrieve** or double-click the listing. The Allworx System allows retrieving any parked call in the *Parked Calls* pane.

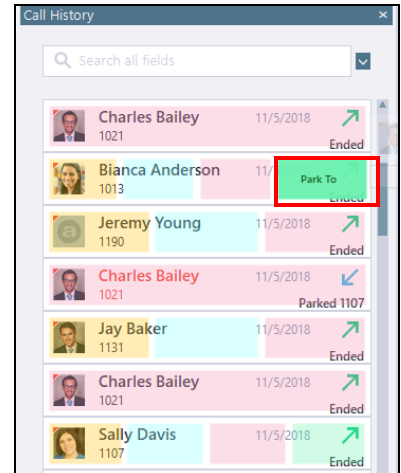**Interact Professional and Interact Softphone Park Examples (Allworx System Software 8.5 and higher):**

Current Calls pane >
More drop-down arrow options
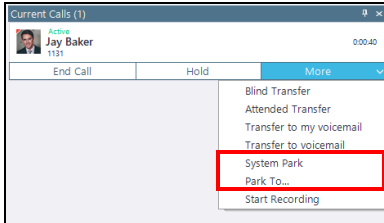
Parked Calls pane

Call History pane >
Park To Target Available

Contacts pane >
Park To Target Available
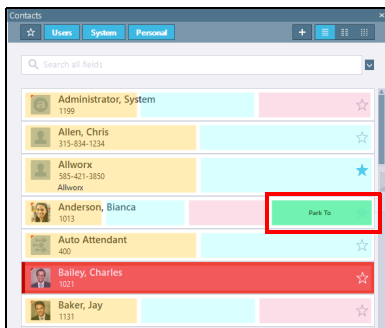
6.9.1   Parked Call Notifications

The Park to Extension feature notifies users configured to receive parked calls or Park to Extension recipients of interest about a parked call.

Example:

After the Allworx Server Administrator enables the Park to Extension feature on Bob's extension, Bob's devices automatically notify him when someone parks a call to his extension. In addition, if Bob has a Park to Extension programmable button on his Verge phone for the Sales Department, the Allworx System automatically notifies Bob of any calls parked on the Sales Department extension.

The Interact Professional notifications include:

• Notification pops up similar to an incoming call notification

- Updated *Parked Calls* pane (All parked calls enabled) with the *Parked Calls* listing

- Updated *Current Calls* pane with the *Parked Calls* pane listing and a parked status

Parked Call Notification Examples:
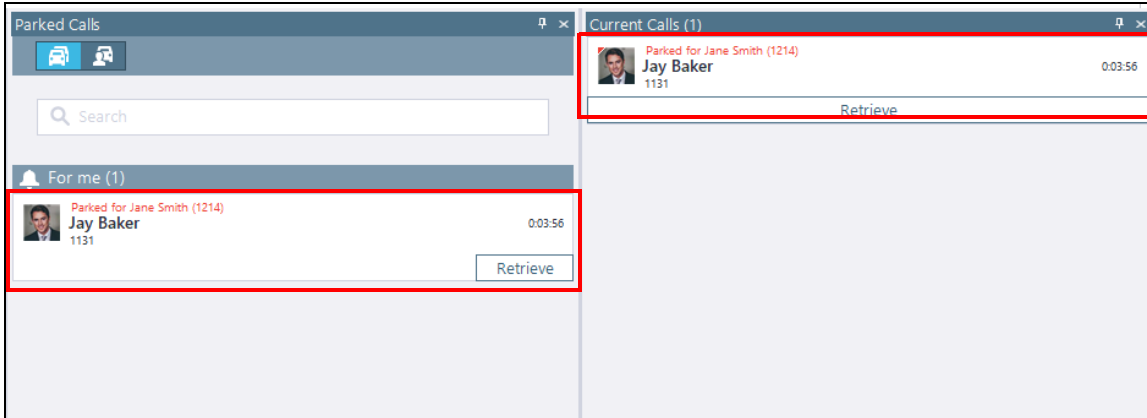
To enable or disable the parked call notifications:

1. Locate the *Contacts* pane.

2. Right-click the contact listing and then click to select the check box to enable Parked call notifications, or click to de-select the check box to disable notifications.

6.9.2   Parked Call Listings

The *Parked Calls* pane displays parked calls. In Allworx System Software version 8.5 or higher, the Allworx Server Administrator sets the *Parked Calls* pane display for viewing the following the types of parked calls in the order listed with the longest park time at the highest level for each category.

	Allworx System Setting	
	All Calls	**Limited**
Calls parked for the phone owner	✓	✓
Calls parked using this phone		✓
Calls for system extensions enabled for notifications	✓	
Calls for user extensions enabled for notifications	✓	
Calls parked for the extension of configured Park to Extension programmable buttons		✓

	Allworx System Setting	
	All Calls	**Limited**
Calls matching a System Extension Contact (example: Sales Dept) without notifications	✓	
Calls for user extensions without notifications	✓	
System parked calls	✓	✓

Note: Allworx phones do not provide notifications for calls that are not eligible for the parked calls list on the phone, even if the owner has set the notification flag for other contact with parked calls.

When viewing many parked calls, users can use the search field to locate a specific call by entering one of the following criteria:

- Recipient's extension contact name
- Caller's caller ID
- Recipient extension

Parked Call Listings Example:

All parked calls: displays all Parked Calls on the Allworx System.

Parked by me: displays only the calls parked by the Interact Professional user.

Notification: indicates that the Interact Professional user wants to be notified when calls are parked for that recipient.

Search field: enter criteria about a specified park call.

Retrieve button: click to answer any parked call.

6.9.3   Reminder Period

If the parked call recipient does not retrieve the call within the time configured, the Verge IP phone and Interact Softphone provide a notification to the user. See the Verge IP Phone Series User Guide to configure the Reminder Period setting on the phone. Interact Softphone Reminder Periods are configured by the Allworx Administrator on the Allworx System Administration web page.

6.9.4   Call Route Settings

For Park to Extension only: After the timeout period expires, the call follows the next call handling step defined per the extension setting:

- **User Extension:** Defined in the current presence settings of the recipient Allworx User extension configuration. Allworx users with permissions can adjust the Park To Extension timeout and call handling using My Allworx Manager.

- **System Extension:** Defined in the Day/Night mode settings of the recipient Allworx System extension configuration is handled by the Allworx Server Administrator.

6.10   Queue Status

The *Queue Status* pane displays the Call Queue and ACD Queue information when the user is a supervisor or agent of the queue, and/or has a Ring All PFK (Verge phone) or Programmable Function Queue Appearance or ACD Appearance (Interact Softphone) assigned to the handset. Additionally, the *Queue Status* pane provides a shortcut to the Allworx View application.

To answer an ACD call without logging into the ACD queue:

Connect to the call with the longest wait time. Right-click the ACD queue name > **Answer Call**.

To identify the Queue Line information:

All information is available to the queue agent. For Ring-All queues only: the window displays all information except Agents Logged In.

The Queue Line provides the following information:

Information	Description
Queue Description*	Name of the queue.
Queue Distribution Mode*	Identifies the calls distribution method:
	• Ring All • Linear Priority • Sequential Round Robin • Fairness - Longest Idle
Agents Logged In	Identifies the number of logged in agents in the queue.
Longest Wait Time*	Period of time the oldest waiting call is in the queue.
Calls in Queue*	Identifies the number of unanswered calls waiting in the queue.

To identify the Agent Status information:

Only queue supervisors can see this information. Click the arrow to the left of the queue description.

Field	Description
Agent	Displays the agents assigned to the queue.
State	Identifies agent status.
Reason	Identifies the agent busy state.
Duration	Identifies the amount of time the agent in the current state except for the logged out state.
Active Queues	Identifies the queue when the agent is currently handling a call.

6.10.1 Accessing the View Application

Access detailed Allworx phone system data and usage reporting. Click **Launch Allworx View** to open the View application in the default web browser window, and then manage the View application as defined in the Allworx View Application User's Guide. If the *Launch Allworx View* option is unavailable, the Interact Professional user interface periodically checks for View availability.

6.10.2 Queue Alarms

Alarms are available that alert the users in the Supervisor role when the wait time for a call within the queue and/or the queue depth have reached defined maximums. These maximums are defined by the Allworx System Administrator using the Allworx System Administration web page to assign PFKs to an Allworx desk phone or Programmable Functions to Interact Softphone.

When either alarm threshold has been reached, the listing for the queue in the *Queue Status* pane flashes in either yellow or red, depending on the severity of the alarm. If enabled, an audible alarm also sounds.

To end the alarm, right-click on the queue entry and select either Silence alarm or Dismiss alarm from the pop-up menu.

A similar alarm can also be defined for when there are no agents logged in to a queue. Similarly, the entry for the queue flashes yellow or red and an audible alarm sounds. For this alarm, right-click on the queue and select **Silence alarm**, **Dismiss alarm**, or **Answer Call** from the pop-up menu.

Chapter 7 Interact Sync

Interact Sync is a customizable plug-in that enables click-to-dial capabilities between Interact Professional and Interact Softphone and installed versions of the Skype for Business 2015 or 2016, and Microsoft Outlook 2010, 2013, and 2016 applications, as well as the Google Chrome and Mozilla Firefox web browsers. Additionally, Interact Sync supports synchronization between Allworx Presence and Skype for Business Availability, Microsoft Outlook meetings, and the Allworx handset. When manually changing a presence or Availability status in one application, the other application synchronizes to that status. To customize the Interact Sync feature, see <u>"Configuring the Application from the Options Menu" on page 39</u>.

When manually selecting a Skype for Business Availability, or an Interact Professional user interface Presence setting, the applications synchronize and display the following respective settings:

Interact Professional Presence	Skype for Business Availability
In office	Available
Busy	Busy
(Unaffected)	Do Not Disturb
Away	Be Right Back
At Home	Off Work
Away	Appear Away

7.1 Set Interact Sync as the Default Dialing Application

While installing the Interact Sync application, the following occurs on the Windows operating system:

Windows 8
- If there is already a default TEL protocol handler, Interact Sync does not register as the default TEL protocol during installation. To register the Interact Sync plug-in as the Windows default dialing application on the PC:

    - Click **Start** > **Control Panel** > **Default Programs**.

    - Click **Set your default programs**.

    - Locate and click **Allworx Interact Sync** > **Choose defaults for this program**.

    - Check the box next to **TEL**, and then click **Save**. The Windows operating system saves the changes.

- If there is not a default TEL protocol handler, the operating system registers the Interact Sync application as the default TEL protocol handler during installation.
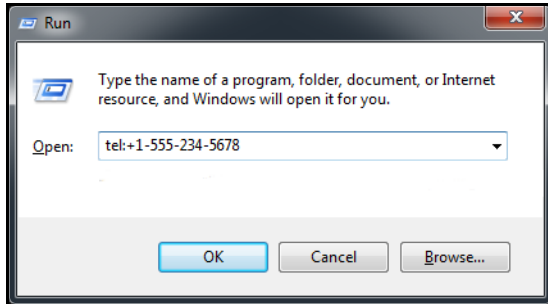
Windows 10
After installing the Interact Sync application, the Windows 10 operating system displays a pop-up message asking the user to select the TEL protocol handler to use when performing a TEL function.

To use the TEL protocol:

Perform one of the following:

- Executing a TEL protocol from the *Windows Run* dialog box.

  - Click the PC **Start** icon.

  - Locate the search field, type RUN in the field, and hit enter. The RUN window opens.

  - Type `tel: <phone number>` in the field, and then click **OK**. The Allworx phone connected to the Interact Professional application automatically dials the number.

- Double-click a Windows shortcut that points to a TEL protocol.

  - Locate the Windows shortcut and double-click.

  - Locate the **<type> Document** tab. Verify the number is correct and click **OK**. The Allworx phone connected to the Interact Professional application automatically dials the number.
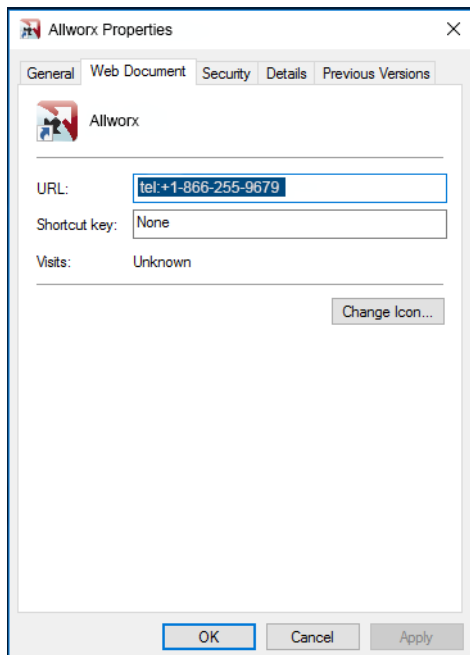
- Supports the TEL protocol if the web page supports TEL protocol.

7.2   Click-to-dial with the Google Chrome or Mozilla Firefox Web Browser

Easily click-to-dial a phone number on a Google Chrome or Mozilla Firefox web page using the Interact Professional user interface (with an Allworx desk phone or Allworx Interact Softphone). Users can navigate to a web page, click a phone number to dial, and automatically send a call from the Allworx handset connected to the Interact application.

To select the number to dial:

Select one of the following options:

• Click the enabled Allworx logo, and then select a detected number in the drop-down list. If Interact Sync does not detect any phone numbers, the Allworx logo is disabled. Examples below are from Mozilla Firefox web browser (Google Chrome browser displays the Allworx logo in the URL Address bar).
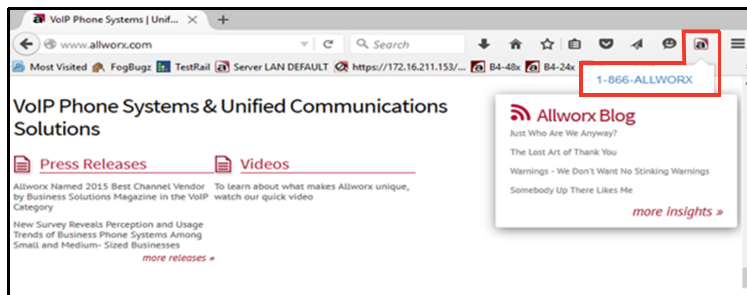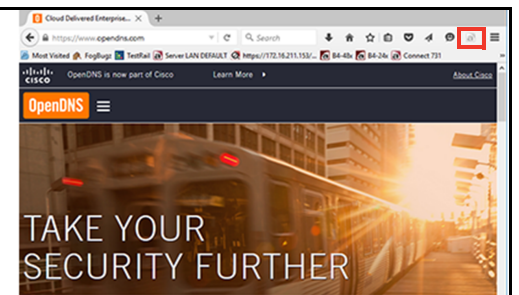
Phone number detected   No phone number detected

• Place the cursor over the phone number listed on the web page – the cursor changes from an arrow to a hand. Click the number.

- Highlight and right-click the phone number on the web page.
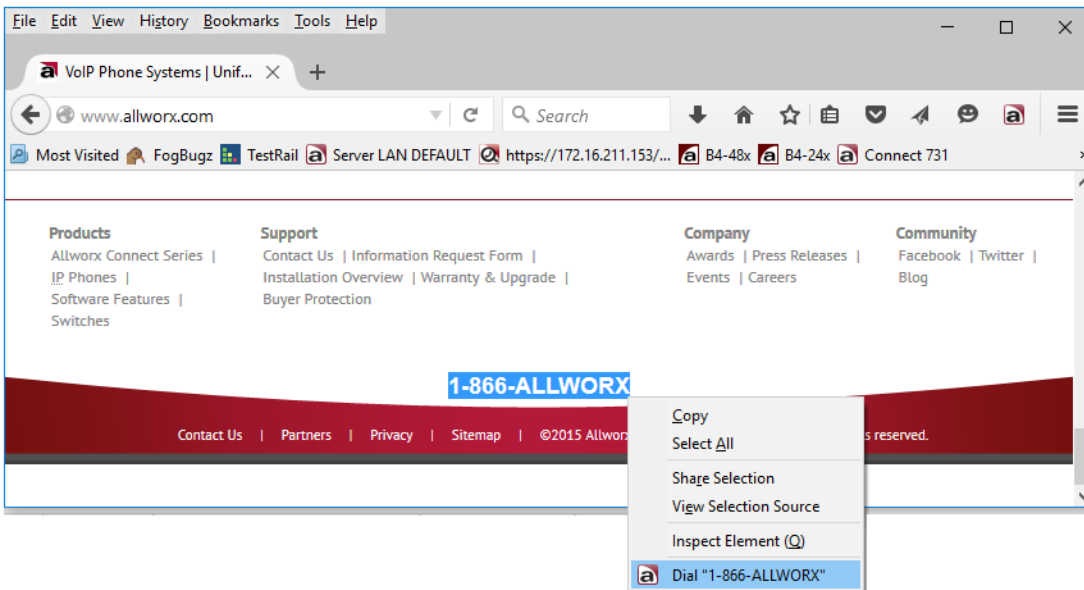
To disable Interact Sync within the Mozilla Firefox web browser:

Navigate to **Open menu** > **Add-ons Manager** > **Extensions** > **Allworx Interact Sync for Firefox** > **Disable**.

To disable Interact Sync within the Google Chrome web browser:

Navigate to **Open menu** > **Settings** > **Extensions** > **Allworx Interact Sync for Chrome** and then uncheck the *Enable* check box.
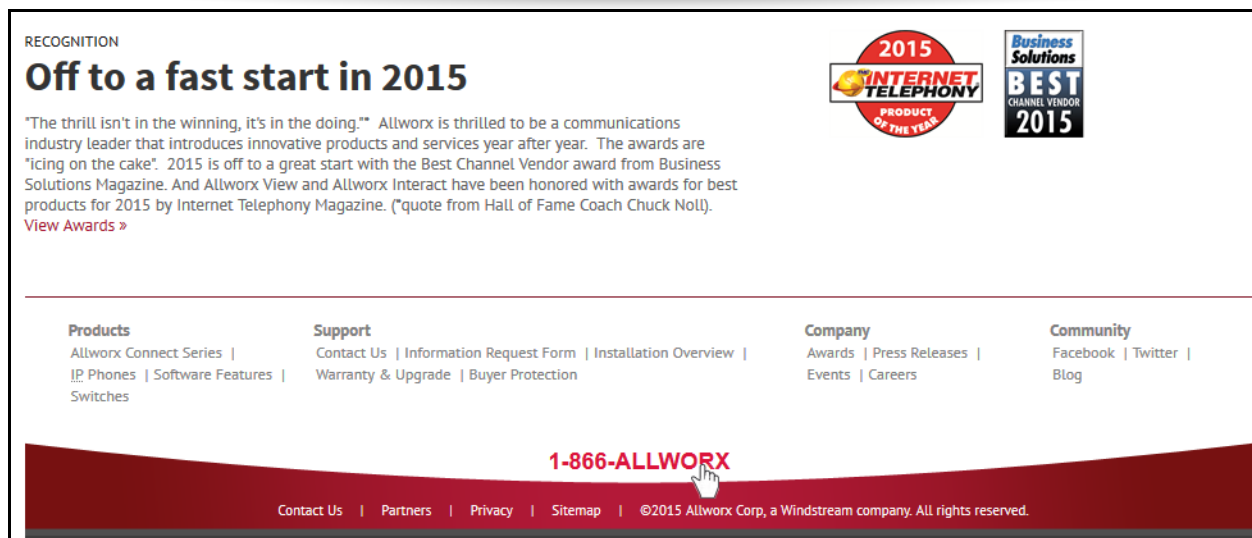
7.3   Click-to-dial with Microsoft Outlook

Click-to-dial a Microsoft Outlook 2010, 2013, or 2016 contact with the Interact Professional application and a connected Allworx desk phone.

Interact Professional users can right-click any Outlook contact and then **Allworx dial** to see the available phone number information (except FAX numbers). After selecting a phone number, the Interact Professional application automatically sends a call from the connected Allworx handset to the Outlook contact.

The **Allworx dial** menu is available in the following Outlook screens:

• **People** tab > **Contacts List** (2 options)
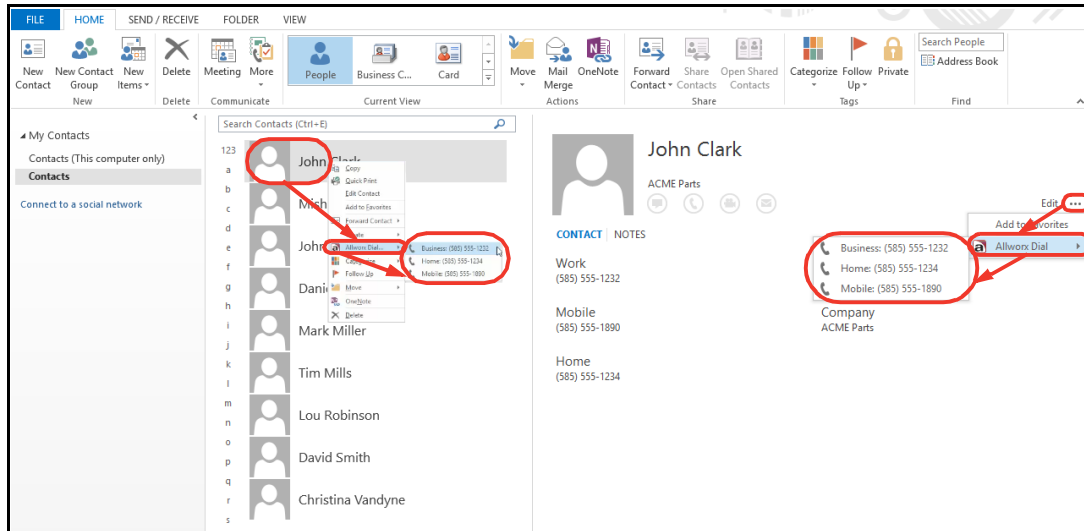
Option 1
1. Right click the contact.
2. Click **Allworx dial...**
3. Click the contact phone number to dial.

Option 2
1. Click the ellipsis for more options.
2. Click **Allworx dial...**
3. Click the contact phone number to dial.

• **Email** > **To** field
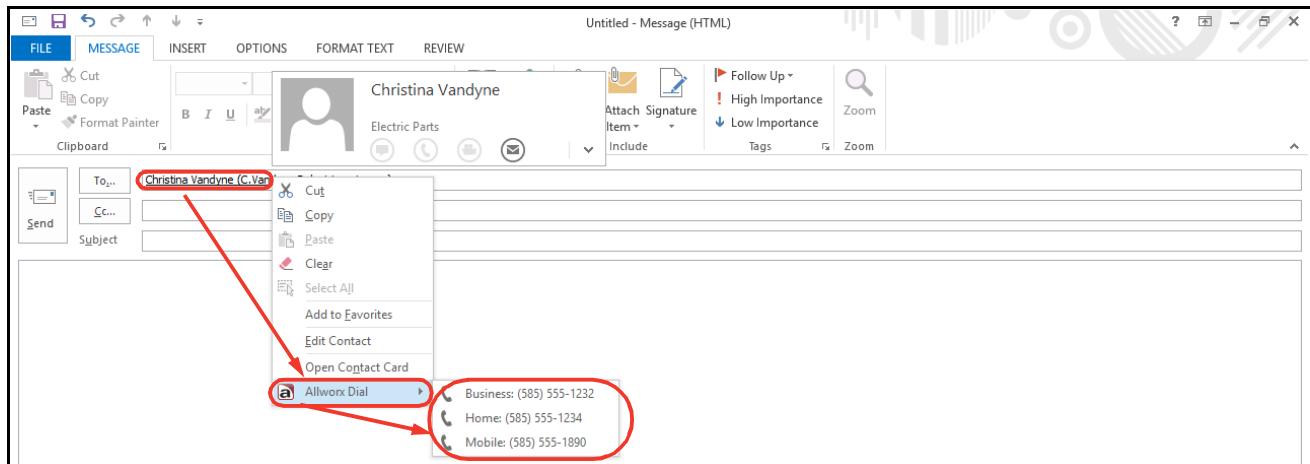
1. Right click the email addressee.
2. Click **Allworx dial...**
3. Click the contact phone number to dial.

7.4   Presence Synchronization with Microsoft Outlook

Easily synchronize Allworx Presence with Outlook calendar appointments.

When creating or modifying an Outlook appointment, the Set Default Presence setting in the Outlook tool bar enables selecting an Allworx Presence setting for an appointment. The Allworx Presence status automatically updates through Interact Professional for the duration of the appointment, and

then restores to the original value once the appointment is finished. The Allworx Presence changes to the pre-appointment state after exiting the Interact Professional application.
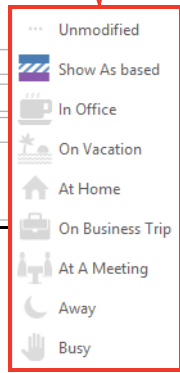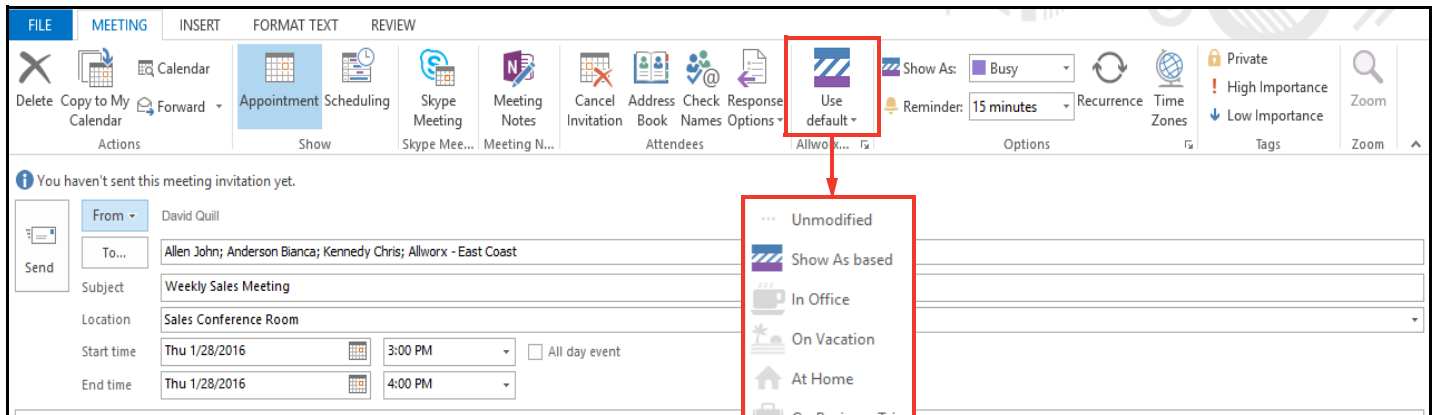
Use Default: displays a drop-down list to select which Allworx Presence setting to use while the meeting or appointment is in progress.
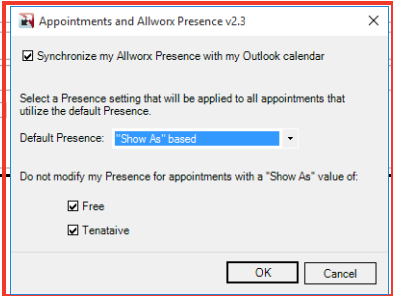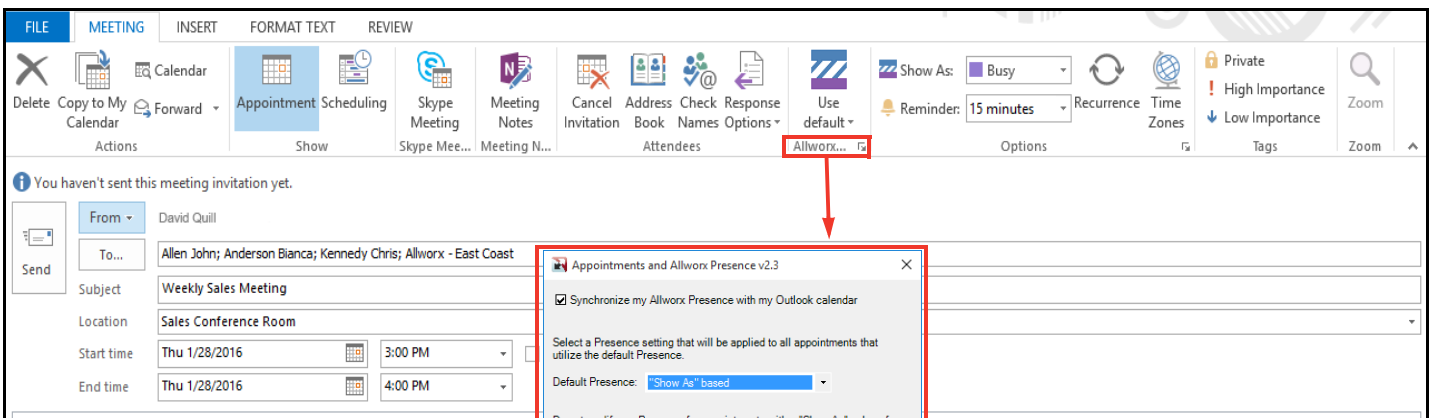
Allworx…:check the box to enable the synchronization. Use the drop-down list to select the default presence, and then click **OK**.

When the Allworx Presence setting is not set for an appointment or is explicitly set to use the default setting, the user's Allworx Presence status updates to the default value for the duration of the appointment. Users can configure the Allworx Presence value in the Interact Sync options screen in Interact Professional or by selecting the default Presence in Outlook.

Users can also modify an Allworx Presence based on the "Show As" value for the given appointment. The Show As value of an appointment maps to an Allworx Presence according to the following:

Outlook "Show As" Value	• Free • Tentative	Working Elsewhere	Busy	Out of Office
Allworx Presence Value	Does not change the user's Presence	On Business Trip	At A Meeting	Away

Chapter 8   Troubleshooting

Condition	Description	Solution
Installation		
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 application.	User must do a complete removal of McAfee anti-virus, using the MCPR.exe tool. 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.macafee.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. ***Note:*** *The Allworx Interact Professional application requires an additional un-install and re-install.*
Warning message during the Interact application uninstall process.	In Windows, users can install Interact for multiple user accounts.	Click **Continue** to uninstall the Allworx Interact application. This does not affect other installations of the Interact application.
The current 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 un-installer works without regard to version level reported in the **Control Panel** > **Programs and Features** > **Install** or **Change** a program page.

Condition	Description	Solution
During install the following message displays: You do not have sufficient privileges to complete this installation for all users of the machine. Log on as the administrator and retry this installation.	Insufficient PC privileges to install Interact Sync.	Interact continues to install. The Interact Sync application and features are unavailable. I believe the following link needs updating... User must run Interact Sync installer as administrator. Interact Sync installer is located at: %localappdata%\Allworx\Interact\<current
Login		
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.	Click **OK** to close the Windows Security Alert dialog window. To add the Allworx Server IP: • Ask the Allworx administrator the IP address of the server, and enter the IP address manually. • Ask the Allworx administrator to add a firewall exception on the workstation for the Interact application.
The Interact application detects an upgrade is available, but user sees an error message when attempting to upgrade.	The Interact application detected an upgrade.	Exit the application by clicking the icon in the Windows System Tray, and click **Exit**. Restart the application.
The Interact application feature does not work as described.	The Interact application features are missing or don't work properly.	Verify that the Interact application is the latest version.
Password failure	The Interact application does not accept the newly changed password.	The new password or PIN does not meet the Allworx System Software requirements. Contact the Allworx administrator for the password/PIN requirements.
Logged in, application opens, but it is not available on the screen.	The Interact application was minimized to the Windows System Tray prior to the last application exit.	To open the Interact Professional user interface to full screen: 1. Locate the Windows System Tray (lower right corner of the screen - typical). 2. Click the Allworx icon (red circle with white lowercase "a"). A drop-down menu displays. 3. Click **Open**. The user interface displays full screen.

Condition	Description	Solution
Messages		
Message displays: Communication with phone has been lost. Attempting to reconnect.	The Interact application has lost contact with the phone and is attempting to reconnect.	Verify the following connections: • Phone • Computer • Network activity Verify phone is not rebooting. If the Allworx administrator rebooted the phones, restart the Interact or Interact Professional application.
Message displays: Reconnecting with the phone.	The Interact application connection to phone was lost, and is actively attempting to reconnect.	Verify the following connections: • Phone • Computer • Network activity Verify phone is not rebooting.
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 Interact application as an exception. Contact the system administrator.
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 "Begin talking using the designated Allworx handset, and then click End Call when finished." on page 38 for more information.
Manage Calls		
Cannot place a call on an outside line.	Cannot access an outside phone line.	Dial the outside line access digit set in your dial plan - usually **9** or **78+PIN code**. If this does not work, verify with the Allworx administrator that the outside line access information based on the Dial Plan External Dialing Rules.
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.
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.
Selected Interact contact does not dial correctly.	Interact user selected an Interact contact to dial with a local number that requires dialing an area code.	The Allworx Administrator must add the local area code into the Allworx server dial plan, but the Allworx server strips the "9 + 1" from the entered phone number. The Allworx Administrator must configure the Allworx server so that the send digits as dialed on the outside line is disabled.

Condition	Description	Solution
An error message displayed when the recording drive is unavailable.	While recording an Interact call, the drive specified to store the recording file becomes unavailable.	Do one of the following: • Restore drive connection. • Select a new location to store the recording file. • Cancel the recording. **The file will be lost**.

Windows

Condition	Description	Solution
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 Windows Administrator that the Interact application is on the same network as the handset and network routing is consistent.
Not all the panes display in the Interact Professional user interface.	The *Visible Windows* setting was changed.	Navigate to **Settings** > **Visible Windows** and select the windows to display.
	The user may not have server permissions to display certain windows.	Verify the correct permissions to view active system calls. Also, the outside lines window does not display if the her does not have any outside lines defined for the handset.
Cannot find the personal contacts in the *Contact* pane.	Outlook Interact contacts do not display in the Interact Professional user interface *Contact* pane.	The Interact Professional user interface requires the Outlook 2010 application to be open prior to launching the application. 1. Close the application. 2. Launch the Outlook 2010 application. 3. Restart the Interact Professional application. The Outlook contacts are now available within the Interact Professional user interface.
Agent is in an unknown state.	The agent logged out of the Interact application while the application was in a hibernate, sleep, or screen lock state.	Restart the Interact application.
The Agent option for Interact Softphone is not included in the Visible Windows list.	The *Agent <user name>* pane is not visible and is not able to be selected as an option in the Visible Windows drop-down list.	Contact your system administrator to verify that the user has an ACD Programmable Function defined for the Interact Softphone handset.

Interact Sync

Condition	Description	Solution
Interact Sync is not working.	The Interact Professional application is not synchronizing with Skype for Business application.	The Interact Sync application requires the Skype for Business 2015 or 2016 application to be running. Interact Sync does not work with earlier versions of Skype for Business.

Condition	Description	Solution

The Interact Professional user interface presence setting is not synchronizing properly.	The synchronization between the Skype for Business application and the Interact Professional application is not updating properly.	Do the following:
		 • Check the Skype for Business client is updating properly.
		 • Verify the Interact Sync feature key and application are installed.
		 • Check the settings in **Settings** > **Options** > **Interact Sync**.
		 • Shutdown Skype for Business and Interact Professional, and then restart in the following order:
		    • Skype for Business
		    • Interact Professional

The Interact Professional user interface Presence does not change per the Outlook calendar.	The Skype for Business application does not synchronize with the Outlook calendar availability, which synchronizes with the Interact Professional user interface Presence setting.	Do the following: • Schedule meetings in advance. • Check the Skype for Business client is updating properly.
The Allworx Presence is not changing with the Outlook appointments.	The Outlook calendar is not syncing the Allworx Presence.	Check the following settings available at **Settings** > **Options** > **Interact Sync** and verify: • The **Presence Synchronizations** options check box is enabled (checked). • The **Override options** are not enabled (unchecked) - e.g., On Vacation, On Business Trip, or At Home. • The **Appointments and Allworx Presence** > **Default Presence for calendar appointments:** is set to the "Show As" based option. • The **Appointments and Allworx Presence** > **Do not modify my presence for appointments** with a "Show as" value of: overrides are not enabled (unchecked) - Free or Tentative.
The Outlook welcome screen displays.	User does not have an Outlook profile and does not expect to see this screen.	Interact Professional user interface automatically retrieves contacts from Microsoft Outlook, regardless if there has never been an Outlook profile created.

Miscellaneous

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.	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. 4. Re-launch the Interact application.

Condition	Description	Solution
The font does not look crisp.	Windows XP users may experience bit mapped fonts within the Interact Application.	1. Navigate to the computer desktop and right-click on the desktop. Select **Properties** from the drop-down list. 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.
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 "Begin talking using the designated Allworx handset, and then click End Call when finished." on page 38 for more information.
Cannot find the *Launch Allworx View* button.	The *Launch Allworx View* option is not available in the Queue status window, the Device Status Options drop-down list, or the System Tray options.	The *Launch Allworx View* option is unavailable until the Allworx administrator installs the View CDR feature key and establishes a connection between the Allworx server and the View server. Interact is unable to validate the default View application link.
Unable to update the contact image.	The option to upload a directory contact image is unavailable.	The Allworx Server Administrator has disabled the ability to upload a directory contact image. Contact the Allworx Server Administrator to enable this option.
Directory contact image is gone.	Added a directory contact image, but it is no longer available	The Allworx Server Administrator has deleted the contact image. Replace with a new image.
An alert icon () appears to the right of the Interact Softphone Presence drop-down list.	This icon displays on the user interface as an error message, such as BLF lost, Interact lost connection, Running out of recording space, etc.	Detailed information about the error condition can be seen by hovering the mouse cursor over the alert icon.

Appendix A   Task Table

The Interact Professional user interface provides a wide range of options for managing calls. The following table is useful as a reference for locating varying instructions for some of the most common call management tasks discussed throughout this document.

Call Management Task	Link to Instructions
Answering a call	• "To answer a call from the pop-up dialog box:" on page 25"To answer another user's call from the expanded user interface Contacts pane:" on page 26 • "To pick-up another user's call from the Contacts pane:" on page 63
Placing a call	• "To place a call using an Allworx desk phone:" on page 22 • "To place a call using the expanded user interface Call History or Contacts pane:" on page 22 • "To place a call using the expanded user interface Dialpad pane:" on page 23 • "To answer a call from the pop-up dialog box:" on page 25 • "To place a call:" on page 63
Placing a call on hold	• "Placing a Call On Hold" on page 27 • "To place a call on hold:" on page 66
Ending a call	• "Supervising a Call" on page 28
Transferring a call	• "To transfer a call using the expanded Interact user interface" on page 66
Parking a call	• "To Park a call when using Allworx System Software 8.5 or higher:" on page 72 • "To park a call when using Allworx System Software 8.4 or lower:" on page 72 • "To retrieve a parked call:" on page 73
Muting a call	• "Muting a Call" on page 34
Supervising calls	"Supervising a Call" on page 28
Placing an intercom call	• "Placing an Intercom Call" on page 29
Creating a conference call	"To create a conference call:" on page 68 "To end a conference call using the Interact Professional user interface:" on page 68
Recording a call	• "To record an active call:" on page 37

Continued

Call Management Task	Link to Instructions
Managing Voicemail messages	[“Messages” on page 70](#)
Managing contact information and images	[“Contacts” on page 55](#)
Managing user presence settings	• [“To change the user presence” on page 38](#)
Handling queue calls	• [“To answer an ACD call without logging into the ACD queue:” on page 76](#) • [“To identify the Queue Line information:” on page 77](#)

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