

**Allworx<sup>®</sup> Interact<sup>™</sup> and  
Interact Professional<sup>™</sup> User Guide**

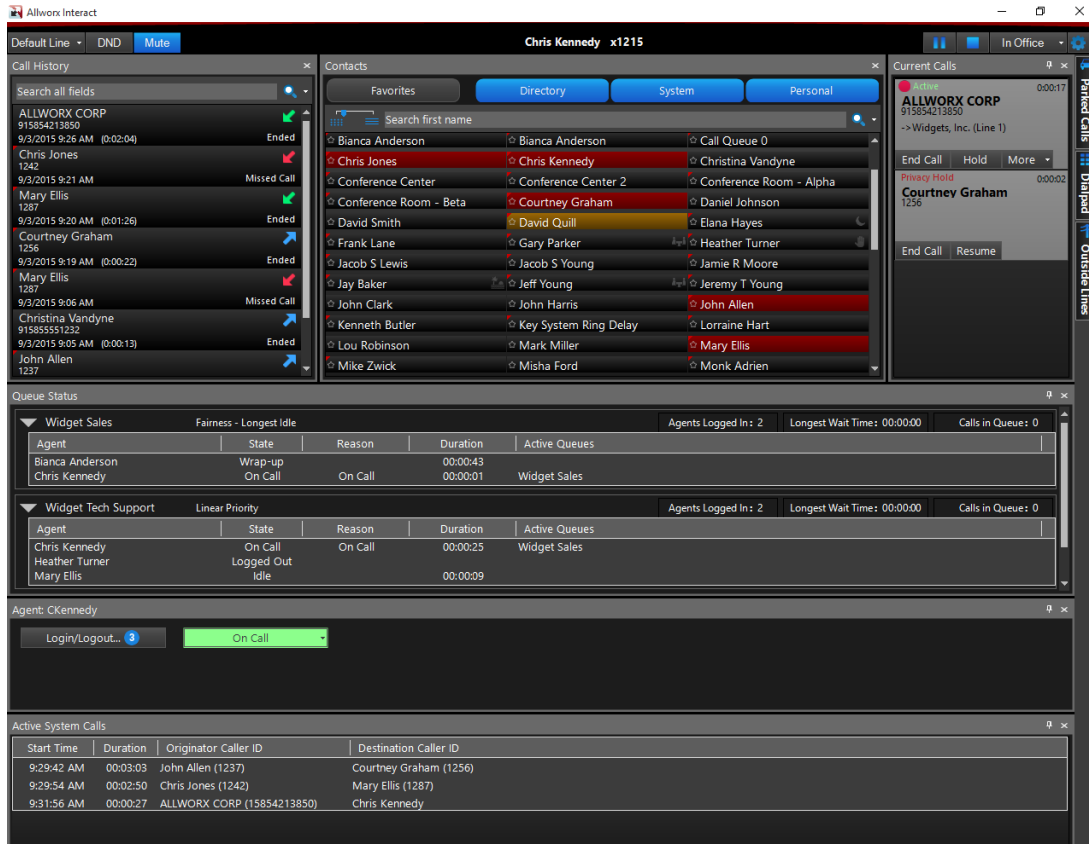
Version 2.2

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# Allworx<sup>®</sup> Interact<sup>™</sup> and Interact Professional<sup>™</sup> User Guide



Version 2.2



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# Chapter 1 Introduction

Allworx Interact provides Windows PC users an intuitive, configurable user interface for controlling an Allworx desk phone. There are two versions of Interact:

- Interact, a free application available to any Allworx user, displays the inbound caller’s name and number in a discrete pop-up, allowing the user to view and answer incoming calls from the PC.
- Interact Professional, a per-user licensed application, adds multiple active windows for current calls, parked calls, call history, dial pad, system and Microsoft Outlook contacts, Allworx system user presence and status, and many more. With Interact Professional, users can click once to dial, transfer, or record calls.

## 1.1 Equipment Requirements

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

Equipment	Requirements									
PC	<ul style="list-style-type: none"> <li>• Running OS described below: <table border="1" data-bbox="467 961 1463 1087"> <tr> <td>• Windows 7 32-bit SP1</td> <td>• Windows 8 64-bit</td> <td>• Windows 10 32-bit</td> </tr> <tr> <td>• Windows 7 64-bit SP1</td> <td>• Windows 8.1 32-bit</td> <td>• Windows 10 64-bit</td> </tr> <tr> <td>• Windows 8 32-bit</td> <td>• Windows 8.1 64-bit</td> <td></td> </tr> </table> </li> <li>• RAM minimum: 2 GB</li> <li>• Monitor resolution: 1024 x 768 (XGA)</li> <li>• Interact or Interact Professional application</li> <li>• Internet connection</li> <li>• Microsoft .NET Framework 4.0 for operating systems Windows 7 and earlier.</li> <li>• Allworx username and password</li> </ul>	• Windows 7 32-bit SP1	• Windows 8 64-bit	• Windows 10 32-bit	• Windows 7 64-bit SP1	• Windows 8.1 32-bit	• Windows 10 64-bit	• Windows 8 32-bit	• Windows 8.1 64-bit	
• Windows 7 32-bit SP1	• Windows 8 64-bit	• Windows 10 32-bit								
• Windows 7 64-bit SP1	• Windows 8.1 32-bit	• Windows 10 64-bit								
• Windows 8 32-bit	• Windows 8.1 64-bit									
Allworx server	<ul style="list-style-type: none"> <li>• Allworx System Software Version 8.0 (recommended) or 7.5.9.4 (minimum) <b>NOTE:</b> Not all Interact Professional features will work with Allworx System Software 7.7 and lower.</li> <li>• IP Address or DNS name Allworx server</li> <li>• Feature key for Interact Professional (not required for all operations in this document)</li> </ul>									
Allworx phone										

## 1.2 Product Comparison

	Interact	Interact Professional
<b>Call Handling</b>		
Answer	X	X
Ignore	X	X
End	X	X

	Interact	Interact Professional
Place on hold	X	X
Transfer		X
Park		X
Conference		X
<b>Interact Features</b>		
Access to the Allworx business directory, call history, and contacts		X
Access to Microsoft® Outlook® application		X
Access to application settings	Limited	X
Access to handset call history		X
<b>Requires Allworx System Software 7.7 or later</b>		
Access to call queue status*		X
Access to call queue agent status (call supervisors only)*		X
Wipe current device	X	X
Change Allworx Password	X	X
Intercom call		X
Call queue features*		X
<b>Requires Allworx System Software 8.0.7.6 or later</b>		
Change Allworx PIN	X	X
Record All		X
Access to agent login features*		X
Launch the Allworx View application**		X
<b>Requires Allworx System Software 8.0.8.6 or later</b>		
Interact Sync ***		X
<p>* Requires the following:  Allworx Automatic Call Distribution feature key.  User assigned as an agent to one or more call queues.  Handset with an ACD PFK assigned.</p> <p>** Requires the following:  Allworx View CDR feature key.  Connection between the Allworx server and the View server.</p> <p>***Requires the following:  Interact Sync feature key (one feature key enables the feature for all Allworx users)  Microsoft Lync 2013 or Skype for Business 2015 installed</p>		



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

## 2.1 Installation Checklist

Follow the order of the steps for a successful installation. For more detailed information, click the link in the Installation Guide Link Column.

Step	Description	Installation Guide Link
1	Install the Microsoft .NET Framework version 4.0 for operating systems Windows 7 and earlier.	

### Download and Install the Interact Application

2	Download the Interact application from <a href="http://get.allworx.com/interact/">http://get.allworx.com/interact/</a> .	For more detailed information, see <a href="#">"To install the application:" on page 3.</a>
3	Double-click the downloaded installer.	
4	Accept the End-User License Agreement.	
5	Configure the application shortcuts.	
6	Click the <b>Launch Interact</b> checkbox, and then click <b>Finish</b> to launch the Interact or Interact Professional application.	

### Log in to the Interact Application

10	Launch the Interact application	For more detailed information, see <a href="#">"To log into the application:" on page 4.</a>
11	Enter the Allworx username and password.	
12	Enter the Allworx Server IP address.	
13	Click <b>Login</b> .	

## 2.2 Install and Log In

To install the application:

<b>Note:</b>	Installing the Allworx Interact application requires Microsoft .NET Framework version 4.0 for operating systems Windows 7 and earlier.
<b>Note:</b>	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.

1. Navigate to <http://get.allworx.com/interact/> for the downloadable version of the application.
2. Double-click the download installer. The Interact Setup Wizard dialog box opens. Click **Next** to proceed.

3. Accept the End-User License Agreement, and click **Next**. Select an Interact Sync setup option:

<b>Do not install Interact Sync. I will install it later if I need it.</b>	Bypasses the Interact Sync installation step. This is the default setting.
<b>Install Interact Sync now (Administrator access required.).</b>	Installs Interact Sync. Installing this feature requires: <ul style="list-style-type: none"> <li>• Interact Sync feature key (one feature key enables the feature for all Allworx users)</li> <li>• Microsoft Lync 2013 or Skype for Business 2015 installed</li> </ul>

4. Click **Next**. Configure the application shortcuts by checking the box.

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.

5. Click **Next**. The Ready to Install dialog box opens. Click **Install** to begin.
6. Click the Launch Interact checkbox, and then click **Finish** to launch the application.

#### To log into the application:

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

#### To add the Allworx Server IP:

- 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.

3. Click **Login**.

Interact	The application icon is visible in the Windows System Tray.
Interact Professional	The application opens.

After log in, a notification may display.

Update is available	Displays when there is an Interact application upgrade available. Click <b>Yes</b> to update the application or click <b>No</b> to continue.
Handset Selection dialog box	Displays if the user has multiple assigned handsets. Click the drop-down arrow to select an available phone from the list. Click <b>OK</b> to continue to log into the server.
Change password	Displays if the Allworx administrator requires the use to change the current Allworx password. Follow the prompts to change the current password.

4. Download the supporting documentation from <http://get.allworx.com/Interact>.
5. Place a test phone call. See [“Manage Calls” on page 13](#) for more information.

## 2.3 Change the Allworx Password

Initiate a request to change the client login password, and must supply both old and new passwords during the request. The new password must match the Allworx System Software requirements.

### To change the login password:

1. Log in the application, and then locate and click:

Option	Interact	Interact Professional
Interact Icon in the Windows System Tray > Settings > Change Password...	X	X
Application Options menu > Settings > Change Password...		X

2. Enter the required information, and then click **OK**. A notification displays indicating the request was successful. Click **OK** to return to the application.

## 2.4 Change the Allworx PIN

Initiate a request to change the client login PIN, and must supply the Allworx password during the request. The new PIN must match the Allworx System Software requirements.

### To change the PIN:

1. Log in the application.
2. Locate and click:

Option	Interact	Interact Professional
Interact Icon in the Windows System Tray > Settings > Change PIN...	X	X
Application Options menu > Settings > Change PIN...		X

3. Enter the required information, and then click **OK**. A notification displays indicating the request was successful. Click **OK** to return to the application.



# Chapter 3 Overview

The Interact application enables placing a call, answering a call, placing a call on hold or ending a call. The Interact Professional application has all the same capabilities as the Interact application as well as transfer, park, or conference a call. Additionally, the Interact Professional application enables access to call history; queue status; and Allworx business directory, call history, and Microsoft Outlook contacts.

The Interact Professional application uses icons as a visual cue for call status and directory contact status.

## Main Interact Professional Screen

The screenshot shows the Allworx Interact Professional interface. Key components are labeled as follows:

- Status Appearances:** Located at the top left, showing 'Default Line', 'DND', and 'Mute' buttons.
- Slide-to-Hide Open Windows:** A vertical bar on the left side of the interface.
- Active Window Action Area:** A vertical bar on the left side, below the slide-to-hide windows.
- Slide-to-Hide Open Windows (bottom):** A vertical bar on the left side, below the active window action area.
- Presence Setting:** Located at the top right, showing 'In Office' status.
- Call Recording icon:** Located at the top right, next to the presence setting.
- Application Settings Menu:** Located at the top right, represented by a gear icon.
- Available Slide-to-Hide windows:** A vertical bar on the right side of the interface.

The interface displays several panels:

- Call History:** A list of recent calls with columns for date, time, duration, and status (e.g., 'Ended', 'Missed Call').
- Contacts:** A directory of contacts with columns for name and status.
- Current Calls:** A list of active calls with columns for caller name, number, and duration.
- Queue Status:** A table showing agent status and queue information.
- Agent: CKennedy:** A section showing the agent's current status (e.g., 'On Call').
- Active System Calls:** A table showing active system calls with columns for start time, duration, originator, and destination.

Both the Interact and Interact Professional application display a small pop-up box in the lower, right corner of the computer screen when there is an incoming call. Click:

Answer	Accepts the call.
Ignore	Stop the ringing of the incoming call, and dismisses the dialog pop-up.

Use the Interact Professional application to view one or more windows. Each window has specific information:

Window	Description
Active System Calls	Displays all current, active calls on the Allworx server. Click the column heading to sort the calls. The sort toggles between ascending and descending order. The windows displays: <ul style="list-style-type: none"> <li>• call start time.</li> <li>• call duration.</li> <li>• originator caller ID.</li> <li>• destination call ID.</li> </ul> Click the Slide-to-Hide window tab to view or hide the window.
Agent: <name>	Enables agents to log in to or log out of call queues or identify a busy status.
Call History	Displays the previous call information such as Caller ID name/number, date and time of call, and call status.
Contacts	Displays: <ul style="list-style-type: none"> <li>• Allworx directory contacts.</li> <li>• Personal directory contacts from the user's Microsoft Outlook application.</li> <li>• Allworx system contacts.</li> </ul>
Current Calls	Displays the active calls of the user. Click the Slide-to-Hide window tab to view or hide the window.
DialPad	Enables the user to dial numbers from the PC. Click the Slide-to-Hide window tab to view or hide the window.
Outside Lines	Displays all line appearances available to the handset. Outside lines: that are in-use are solid red. Click the Slide-to-Hide window tab to view or hide the window.
Parked Calls	Displays a view of the calls in the Parking Orbit. Click the Slide-to-Hide window tab to view or hide the window.
Queue Status	Displays the current ACD and Call Queue status as well as provides a shortcut to the View application. All assigned agents can view the queue information. A queue supervisor can see agent status. Click the Slide-to-Hide window tab to view or hide the window.

The Interact Professional main window provides flexibility in customizing windows to accommodate personal preferences. Interact Professional users can:

Slide-to-hide tab	Click the <b>Slide-to-hide</b> tab opens the window. Click the <b>Unpinned</b> active icon to keeps the window open. The window is available to undock from the main application window.
Pin or Unpin	Clicking the Pin active icon for each window keeps that window open while docked in the main application window.
Resize	Open each window within the main application screen and manage the windows size without using valuable computer screen space.
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™ application and open in the same location when relaunching the application. To undock the window: <ol style="list-style-type: none"> <li>1. Pin open the windows prior to undocking the window, see above.</li> <li>2. Double-click or click and drag the window title bar of the application window.</li> <li>3. Move and adjust the window.</li> </ol>

Undock or dock (con't)

Docked windows

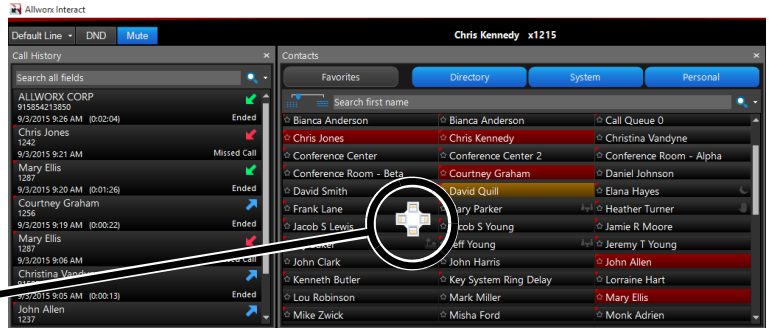
Returns the window back to the main application window.

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.

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 [“Options” on page 22](#) for more information.

### 3.1 System Tray

The Interact and Interact Professional applications display in the Microsoft Windows system tray (lower, right corner of the PC screen). Click the Interact icon to select one of the configuration options. See [“Options” on page 22](#) for more detailed information about each option. The available options are:













- Show Active Call window or Hide Active Call window
- Update (only displays if a software update is available)
- Settings
- Launch Allworx View... (available only on Interact Professional only)
- Find out more...
- About...
- Logout <username>...
- Exit

## 3.2 Icons

The Interact Professional application uses status icons and active icons to provide visual information about users and to manage calls. The status icons are applicable to Allworx directory contacts only.










### 3.2.1 Status Icons

The status icons provide a visual cue of contact type and contact availability.

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

### 3.2.2 Active Icons

The action icons enable actions without going into the settings menu or using the phone. Click the icon to activate.

	Place a phone call. Click twice to redial the last number.		Pinned window. Window is available for undocking.		Pause Call Recording.
	Dialpad backspace		Unpinned window. Window is available for Slide-to-Hide option.		Resume Call Recording.
	Closes window within the application. Sets an undocked window to invisible. See <a href="#">"Options" on page 22</a> to reactivate window.		Begin Call Recording.		End Call Recording.

## 3.3 Wipe Current Device

The Wipe Current Remote Licenses feature enables the Allworx 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 feature requires Allworx System Software 7.7 or later, and the Allworx administrator to change the user password, which terminates the Reach application.

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



## 3.4 Interact Sync

Interact Sync enables communication between Interact Professional and an installed Lync 2013 or Skype for Business 2015 application. Interact Sync supports selecting a user to click-to-dial from the Lync or Skype for Business contact list as well as synchronizing the presence and availability statuses based on specific phone or PC activity. Additionally, when manually changing a presence or Availability status in one application, the other application synchronizes the status.

The customizable options include:

- Click-to-dial
- Availability synchronization
  - Effect of phone calls on my Availability
  - Synchronization with my Allworx Presence
  - Synchronization with Do Not Disturb on my Allworx phone
  - Overrides for the synchronization feature

When manually selecting a Lync or Skype for Business Availability or an Interact Professional presence setting, the applications synchronize and display the respective settings:

<b>Interact Professional</b>	<b>Lync or Skype for Business</b>
In office	Available
Busy	Busy
(Unaffected)	Do Not Disturb
Away	Be Right Back
At Home	Off Work
Away	Appear Away



# Chapter 4 Manage Calls

The Interact and Interact Professional applications enables managing the incoming and outgoing phone calls using a PC.

Feature	Interact	Interact Professional
Place a call	X	X
Answer a call	X	X
Place a call on hold	X	X
End a call	X	X
Intercom call		X

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

## 4.1 Place a Call

Use one of the following options to place a call:

Option	Interact	Interact Professional
Handset	X	X
Call History Window		X
Contacts Window		X
Dialpad Window		X

### To place a call using the handset:

1. Pick up the handset or press the handset speaker phone soft key.
2. Dial a number. After dialing the call, the application displays a pop-up with the Cancel button. Press the Cancel button to stop placing the call.

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

Select a listing in the window, and then select an option:

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

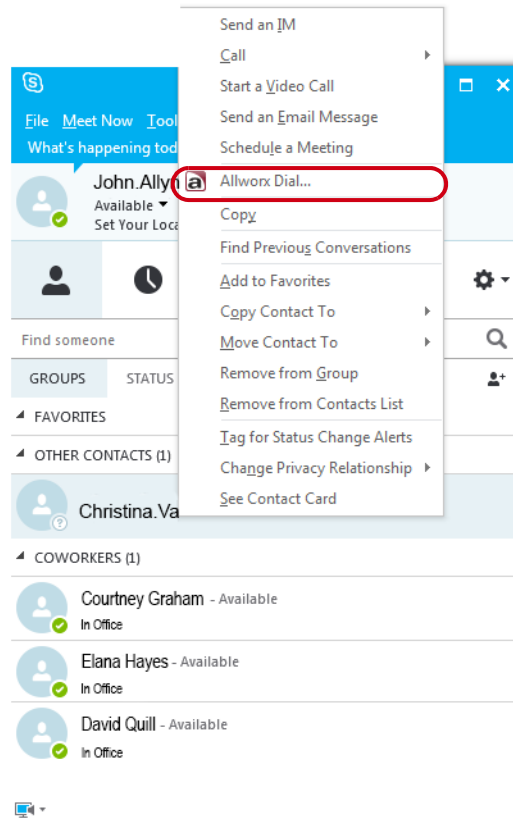
### To place a call using the Dialpad window:

See [“Dialpad” on page 40](#) for more information.

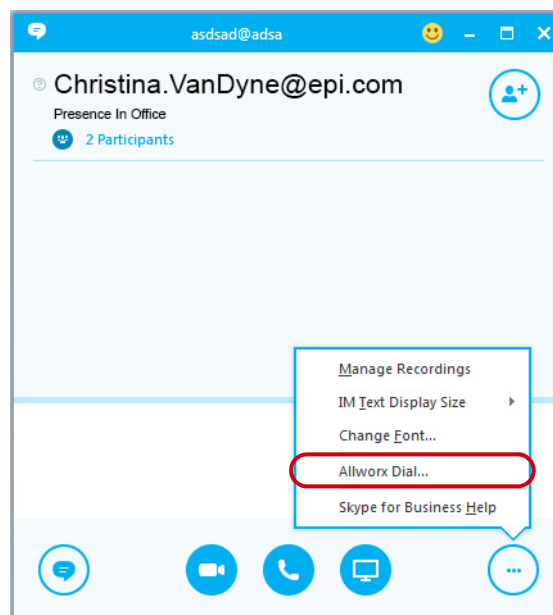
### To place a call using Lync or Skype for Business:

Open the Lync or Skype for Business application and do one of the following:

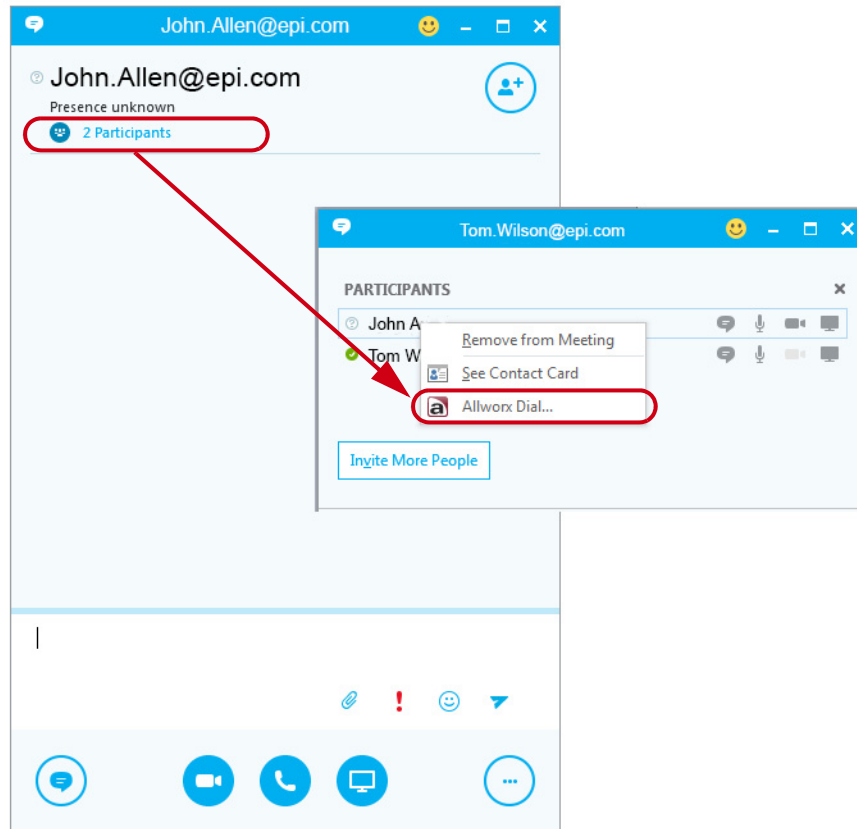
- Right-click a main contact listing to display the context menu (example uses Skype for Business) and select **Allworx Dial...**



- Click the “...” menu on a conversation window (example uses Skype for Business) and select **Allworx Dial....**



- Click the participant list and then right-click the user (example uses Skype for Business) and select **Allworx Dial...**



## 4.2 Intercom Call

The Intercom feature displays if the Allworx phone supports the feature. If the call appearance is currently in use, the Interact Professional application hides the option when using the right-click menu. If all other default call appearances are unavailable, the Interact Professional application uses the Intercom appearance.

### To place an Intercom call (option 1):

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

### To place an Intercom call (option 2):

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

## 4.3 Answer a Call

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

Notification	Interact	Interact Professional
Pop-up notification	X	X
Current Calls Window opens		X

### To answer a call from the pop-up:

For incoming calls, a pop-up displays the caller ID name/number and management options. Click:

<b>Answer</b>	Accepts the call.
<b>Ignore</b>	Silences ringing and dismisses the dialog for that call. This behavior is the same as pressing the Allworx phone Silent softkey.

### To answer a call in the Current Calls window:

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

### Current Calls Window State

Unpinned	The Current Calls 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	<ul style="list-style-type: none"> <li>• Status icon/call details.</li> <li>• Caller ID name and number.</li> </ul>
Call Notification	Pop-up indicating an incoming call with the caller ID name and number.

### Call Management Options

<b>Answer</b>	Displays the call in the Current Calls window and accepts the call.
<b>Ignore</b>	Displays in the Current Calls window and silences ringing. Click <b>Answer</b> to retrieve the call. This behavior is the same as pressing the Allworx phone Silent softkey.

### To pick-up another user's call from the Contacts window:

For incoming calls, the contact flashes red. Right-click the contact and select **Answer** from the drop-down menu.

## 4.4 Place a Call On Hold

The Hold feature enables temporarily interrupting the connection between the callers without disconnecting the call.

To place a call on hold:

Hold Feature	Interact	Interact Professional
Privacy Hold	Click <b>Hold</b> in the Interact™ pop-up (default is the lower, right-hand corner of the computer screen).	Click <b>Hold</b> in Current Calls window. The call listing displays the following information: <ul style="list-style-type: none"> <li>• status icon/call status.</li> <li>• call duration.</li> <li>• caller ID name and number.</li> <li>• End Call and Resume buttons.</li> </ul>
Shared Call Appearance Privacy Hold or Shared Hold	Click the <b>Hold</b> drop-down list button in the Interact™ pop-up to select the preferred option. The default behavior is Shared Hold.	Click the <b>Hold</b> drop-down list button in the Current Calls window to select the preferred option. The default behavior is Shared Hold.
Resume a held call.	Click <b>Resume</b> in the Interact pop-up.	Click <b>Resume</b> in the Current Calls window.
Disconnect the current call	Click <b>End Call</b> in the Interact pop-up.	Click <b>End Call</b> in the Current Calls window.

## 4.5 End a Call

Click the **End Call** button in one of the following options:

Option	Interact	Interact Professional
Pop-up notification	X	X
Current Calls window		X

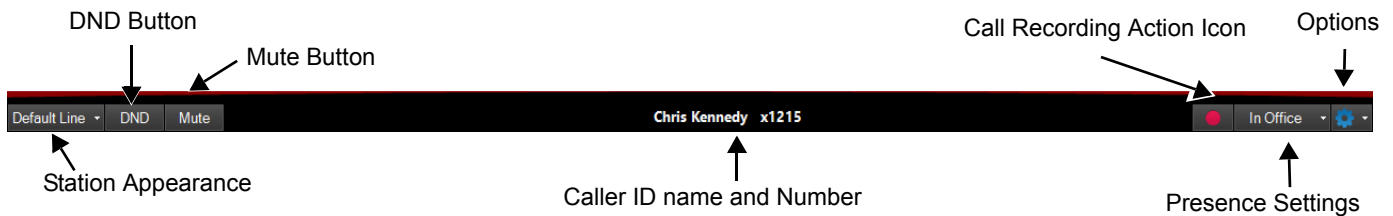




# Chapter 5 Status Bar

This information applies to the Interact Professional application only. Use the Interact Professional status bar to:

- use station appearances to access a phone line.
- use the do not disturb (DND) and mute features.
- manage the call recording feature.
- set the user presence.
- adjust the application options.



## 5.1 Station Appearance

The selected station appearance remains active until changed by the user.

### To select the call type for the outbound call:

1. Click the drop-down arrow. The list of available options display. Select the option to use. The option stays active until a different option is selected.

Default Line	Places an internal or external phone call.
Intercom	Places an intercom call only to Allworx directory contacts or select for a standard call appearance to dial an outside line.
Shared Call Appearance	Enables selecting a specific shared call appearance line.
<other available line appearance>	Enables selecting a specific line appearance to place a phone call.

2. Place a call by using one of the following options:

- open the application dialpad to dial the number.
- use the phone dialpad.
- double-click a listing in the Contacts window.
- double-click a listing in the Call History window

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

## 5.2 DND (Do not Disturb)

When activating the DND feature the handset connected to the application does not ring. However, users can continue to place calls from the application or phone.

To activate DND	Click the <b>DND</b> button. The button changes to blue. <ul style="list-style-type: none"> <li>• All calls follow the next step in the active call route.</li> <li>• It is possible to activate the DND option during an active call. Doing so activates the feature for subsequent incoming calls.</li> </ul>
To deactivate DND	Click the <b>DND</b> button a second time. The button changes to black to indicate it is inactive.

## 5.3 Mute

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

To activate Mute	Click the <b>Mute</b> button. The button changes to blue.
To deactivate Mute	Click the <b>Mute</b> button a second time. The button changes to black to indicate it is inactive.

## 5.4 Call Recording

The call recording feature enables starting, pausing, resuming, or stopping the call recording of the current, active call (including conference calls). During the active call the Interact Professional application provides a status indicator showing that the recording state: active or paused. When a user places a call on hold, the call recording automatically pauses. The recording stops automatically when parking transferring, or ending a call and automatically resumes the call recording when the user resumes the call. Users can pause and resume the call recording manually of any active call.

The Interact Professional application stops the call recording when using a Shared Call Appearance to place the call on a public or bridged hold. Private hold requests work the same as a regular appearance, if the appearance is a shared call appearance. When resuming a previously paused recording, the feature inserts a beep/tone into the recording as a marker and displays a recording flag.

The Record All feature captures audio files from the time the Interact Professional user answers the call or launches the application during an active call automatically when the feature is enabled. 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, the Interact Professional application displays a pop-up message. When launching the Interact Professional application during an active call and the Record All option is enabled, the application inserts three beeps to signal the start of the call recording and there was previously unrecorded information from the phone call.

The Interact Professional application automatically pauses the recording whenever placing the active call on hold, and then automatically continues recording after resuming the call on hold or ends the recording if the caller on hold hangs up.

The Allworx 9212 and 9224 phones support phone-hosted conference calls **or** call recording; the Allworx 9202E and 9204 phones support the call recording capability for three-way phone-hosted conference calls and supervisor call modes. During a phone-hosted conference call, each active call has its own recording file. The recording feature stops when ending an active call in the conference call or ending the conference call.

The Allworx administrator must enable the Call Recording feature.

To change the Call Recording File Location, Record All capability or Volume, see [“Recording” on page 25](#).

**To record an active call:**

Option	Description
Start Recording	Begins recording the conversation. <b>To start the recording, select an option:</b> <ul style="list-style-type: none"> <li>• Click the action icon in the Device Status area.</li> <li>• Navigate to <b>Current Calls &gt; More &gt; Start Recording</b>.</li> </ul>
Pause Recording	Temporarily stops the recording. The icon changes to the Resume Recording action icon, and the Interact Professional application interrupts recording the conversation.  To pause the recording, click the action icon in the Device Status area.
Resume Recording	Restarts recording the conversation. The icon changes to the Pause Recording action icon, and the Interact Professional application starts recording the conversation.  To resume the recording, click the action icon in the Device Status area.
Stop Recording	Ends the recording, and the Interact Professional application saves the file. <b>To stop the recording, select an option:</b> <ul style="list-style-type: none"> <li>• Click the action icon in the Device Status area.</li> <li>• Navigate to <b>Current Calls &gt; More &gt; Stop Recording</b>.</li> </ul>

## 5.5 Presence

The presence shows user availability status. A presence other than In Office displays the status icon for the selected presence. See [“Icons” on page 10](#).

**To change the status:**

1. Click the drop-down arrow next to the status word.
2. Select an option from the drop-down list.

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

## 5.6 Options

The Options feature enables customizing the Interact or Interact Professional application.

To access the Options... menu:

Location	Description	Interact	Interact Professional
Device status > Options...	Displays multiple tabs of available configuration options.		X
System Tray	Displays list of available configuration options.	X	X

Select one of following configuration options:

<b>Visible Windows*</b>	Changes the current window view. Use this setting to open or close windows. When changing slide-to-hide windows to visible, pinned is the default behavior.		
<b>Show Active Call Window / Hide Active Call Window</b>	Displays or hides the incoming, active call pop-up window, respectively		
<b>Update Application</b>	Requests upgrades from the server, if available.		
<b>Settings*</b>	Adjust:		
	<b>Options</b>	Adjust: <ul style="list-style-type: none"> <li>• Call Notification</li> <li>• Sync</li> <li>• Contact Display Settings</li> <li>• Recording</li> <li>• External Program Link settings</li> </ul> See <a href="#">"Update the Settings Options" on page 23</a> , and then click: <b>Apply</b> To view the new settings without closing the Settings window. <b>OK</b> To save all changes or Cancel to ignore the changes. All changed settings persist across application starts (either restart or application upgrade)	
	<b>Change password...</b>	Enables the user to update the current Allworx password. See <a href="#">"Change the Allworx Password" on page 5</a> for more information.	
	<b>Change PIN...</b>	Enables the user to update the current Allworx PIN. See <a href="#">"Change the Allworx PIN" on page 5</a> for more information.	
	<b>Reset UI configuration</b>	Resets the application display settings to the factory defaults. Click <b>OK</b> to accept	
<b>Launch Allworx View...*</b>	Opens 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.		
<b>Find out more...</b>	Links to the Interact Upgrade Options page.		
<b>About...</b>	Identifies the application version level, copyright, and support contact information.		
<b>Logout</b>	Signs the user out of the application; enables a new user to log in the application.		
<b>Exit</b>	Closes the application.		

\* Available on the Interact Professional application only.

## 5.7 Update the Settings Options

### 5.7.1 Call Notifications

This setting enables adjusting the application preferences when receiving an incoming call.

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

### 5.7.2 Sync settings

The setting enables configuring the Interact Sync feature to call a Lync or Skype for Business contact and/or to adjust the presence settings.

#### Click-to-dial options

Contacts in Skype for Business and Lync 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: <ul style="list-style-type: none"> <li>• Work Phone</li> <li>• Home Phone</li> <li>• Mobile Phone</li> <li>• Other</li> </ul>

#### Availability Synchronization Options

Configure the ways the Allworx phone system affects, and/or is affected by, the Skype for Business or Lync Availability. The Availability synchronization feature responds to actions performed (such as pushing the phone DND button) or scheduled events (such as changes to the Skype for Business Availability based on a user's Outlook calendar).

##### Effect of phone calls on my Availability

Check the box to enable automatically updating the Lync or 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: <ul style="list-style-type: none"> <li>• Available</li> <li>• Busy</li> <li>• In a call</li> <li>• In a meeting</li> <li>• In a conference call</li> <li>• Do Not Disturb</li> <li>• Be right back</li> <li>• Away</li> </ul>
--	--

---

### Synchronize with my Allworx Presence

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

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 or Lync 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

---

### Synchronization with Do Not Disturb on my Allworx phone

Check the box to enable automatically updating the Lync or 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 Lync or 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

---

### Overrides for the synchronization feature

Temporarily disable synchronization between the Skype for Business or Lync Availability, Allworx Presence, and the Do Not Disturb statuses.

Locate **Ignore Availability changes when I manually set my Presence to:** and select the applicable option:

- On Vacation
- On Business Trip
- At Home

After configuring the settings, click:

---

<b>OK</b>	Saves the changes and closes the Options... window.
<b>Cancel</b>	Disregards the requested changes.
<b>Apply</b>	Saves the changes and allows continuing to customize the Interact Sync application.

---

### 5.7.3 Contact Display

Adjust the contacts display on the screen.

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

### 5.7.4 Recording

This setting enables identifying the recording storage folder, manage the Record All feature, and volume level.

<b>Folder to store recordings in</b>	The folder to store the recordings displays. To change the folder location, click <b>Browse...</b> and navigate to the new location. Click <b>OK</b> to set the new destination. The file displays in the folder starting with the Interact Professional username and the date.
<b>Record All</b>	Capture audio files from the time the Interact Professional user answers the call or launches the application during an active call automatically. See <a href="#">"Call Recording" on page 20</a> for more information. <b>Enabled</b> - User can turn on the Record All Calls feature locally. The default is Off. <b>Enabled by Server Administrator</b> - Allworx administrator turned on the Record All option on the Allworx server. Users cannot turn off this setting at the local level. The pause, resume, or stop icons are available.
<b>Record volume</b>	Use the slider bar to adjust the volume of the recording. Left for a quieter recording, right for a louder recording.

### 5.7.5 External Program Link

This setting ties the Allworx phone into a business work flow. Specify an action for the Interact Professional application to perform whenever certain phone system events occur and manage existing actions to new requirements.

<b>Rule 1</b>	
<b>Rule name</b>	Enter the name of the rule in the field provided. The Rule 1 heading changes to match the entered description.
<b>Action to perform</b>	
<b>Type of action</b>	<ol style="list-style-type: none"> <li>1. Select an option using the radio button:                     <ul style="list-style-type: none"> <li>• URL - See <a href="#">"To use External Program Link - URL option:" on page 27</a> for more information.</li> <li>• command line - See <a href="#">"To use External Program Link - CMD Shell option:" on page 27</a> for more information.</li> </ul> </li> <li>2. Enter the URL or command line executable.</li> </ol>

<b>Macros</b>	<p>Shortcuts to include in the command line executable. Options: Click the drop-down arrow and select an option. Click <b>Insert selected macro</b> to add to the Command to execute section. Options include:</p> <ul style="list-style-type: none"> <li>• %CALLNUM% (phone number of the caller)</li> <li>• %CALLNAME% (name of the caller)</li> <li>• %DNISNUM% (DNIS number of the caller)</li> <li>• %DNISNAME% (DNIS name of the caller)</li> <li>• %COMPANY% (company name of the caller)</li> <li>• Only inserts COMPANY when the CALLNUM finds a matching contact in the personal contacts and the matching contact has a company assigned.</li> <li>• Automatically appends CALLNUM to the end of an API string with no macros.</li> <li>• Only inserts DNISNUM and DNISNAME when values are available, otherwise the application inserts a blank.</li> </ul>
<b>Macro Expansion Options</b>	<p>Click the arrow to view the drop-down list.</p> <ul style="list-style-type: none"> <li>• Prepend home area code to local numbers:</li> </ul> <hr/> <p><b>Version 7.7 or lower</b></p> <hr/> <p>Verify the Home Area Code is available in the Dialing Plan. If there is no Home Area code, enter the home area code.</p> <hr/> <p><b>Version 8.0</b></p> <hr/> <p>Verify the Home Area Code is in the Dialing Plan.</p> <ul style="list-style-type: none"> <li>• If a Home Area Code is unavailable, enter the home area code.</li> <li>• If a Home Area Code is available, locate the <b>Prepend the area code &lt;area code configured on the server&gt; to all local numbers</b> line and check the box.</li> </ul> <hr/> <ul style="list-style-type: none"> <li>• Strip the external dialing prefix from all phone numbers - Check to select, uncheck to deselect.</li> <li>• Strip the country code from all phone numbers - Check to select, uncheck to deselect.</li> </ul>
<b>When to perform this action</b>	<p>Check the box to enable or uncheck the box to disable the requirement when performing the command. Options:</p> <ul style="list-style-type: none"> <li>• Perform on inbound calls</li> <li>• Perform on outbound calls</li> <li>• Only execute if a call is answered</li> <li>• Only execute if a caller is not in the contact list</li> <li>• Do not execute for internal calls</li> </ul>
<b>Select appearances (Advanced)</b>	<p>Enables selecting which appearances should use the defined rule. Check the box to enable or uncheck the box to disable. Click <b>OK</b> to save the request or <b>Cancel</b> to ignore the request.</p>
<b>Add a new rule</b>	<p>Add a second rule to the External Program Link. Follow the options above to enter the required information in the fields provided. Remember users can:</p> <ul style="list-style-type: none"> <li>• add as many rules as necessary. There is no number limit to adding rules.</li> <li>• rename the rule without affecting the rule behavior.</li> <li>• reorder the rules for processing purposes.</li> <li>• use the Copy button to duplicate an existing rule, and then edit the rule separately.</li> <li>• delete rules.</li> </ul> <p>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.</p>
<b>Problem solving</b>	
<b>Try an example for Rule 1</b>	<p>Displays a sample contact and URL based on the information provided in the Command to Execute section.</p>
<b>Test this action now</b>	<p>Click to verify the command is valid.</p>
<b>Action history</b>	<p>Click the arrow to display the list of recently performed commands.</p>



**To use External Program Link - URL option:**

1. Launch the third-party application in a separate browser window to use with the Interact Professional External Program Link feature. Perform an operation for the information containing one or more of the External Program Link macros in the Interact Professional application.
2. Highlight and copy (**Ctrl + C**) the URL from the browser window. For example: Sales Force application Advanced Search using phone number. `www.salesforce.com/search/SearchResults?searchType=2&str=5854210000&search=Search&sen=0`.
3. Navigate to the Interact Professional application and paste the URL in the **Command to execute** 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.
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>
```



# Chapter 6 Windows

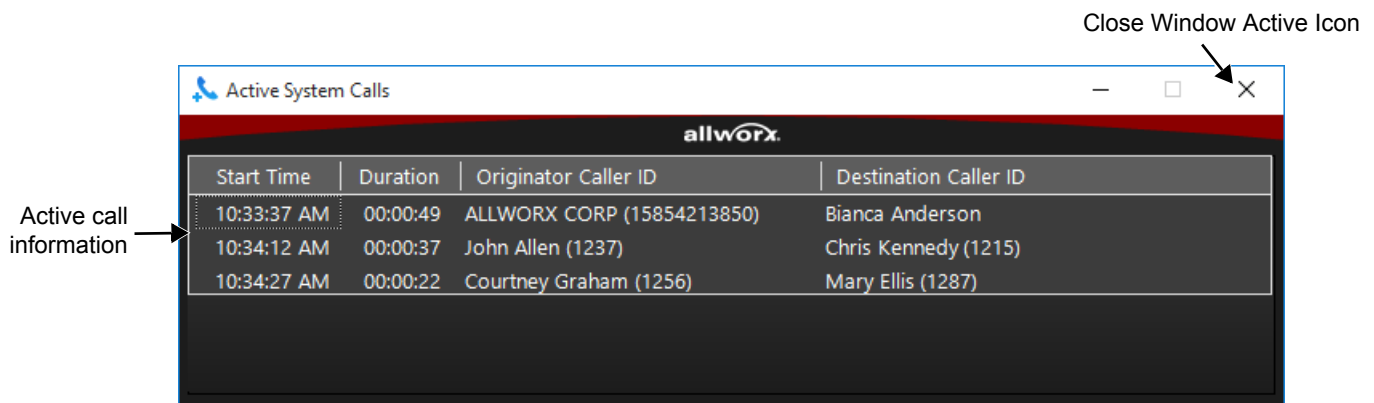
This information applies to the Interact Professional application only. The Interact Professional application displays up to eight available windows to independently manage and customize.

## 6.1 Active System Call

The Active System call window connects internal and external calls and call information such as:

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 displayed information.

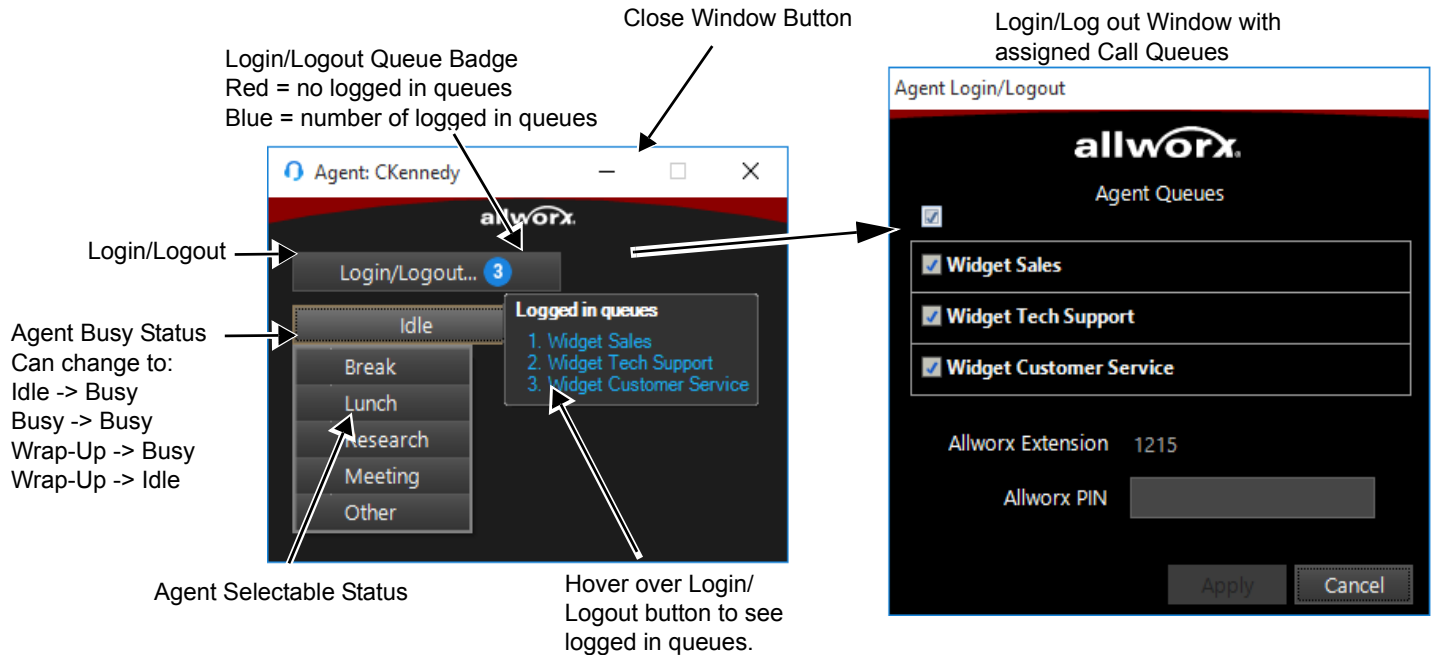


To change the Active System Call window view, contact the Allworx administrator to update the user system-wide active calls display to:

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: window is available to Interact Professional users assigned to a call queue. Agents can log in or log out of call queues as well as select a busy status using the Interact Professional application or the handset, and then the Agent: window automatically updates the agent information.



### To Log in or Log out of a call queue:

1. Click the **Login/Logout...** button. The Agent Login/Logout window opens and displays a list of assigned call queues.
2. Check the box to select the call queue(s).
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. To see the queues the agent has 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, agents can reset the agent status to Busy or Idle.

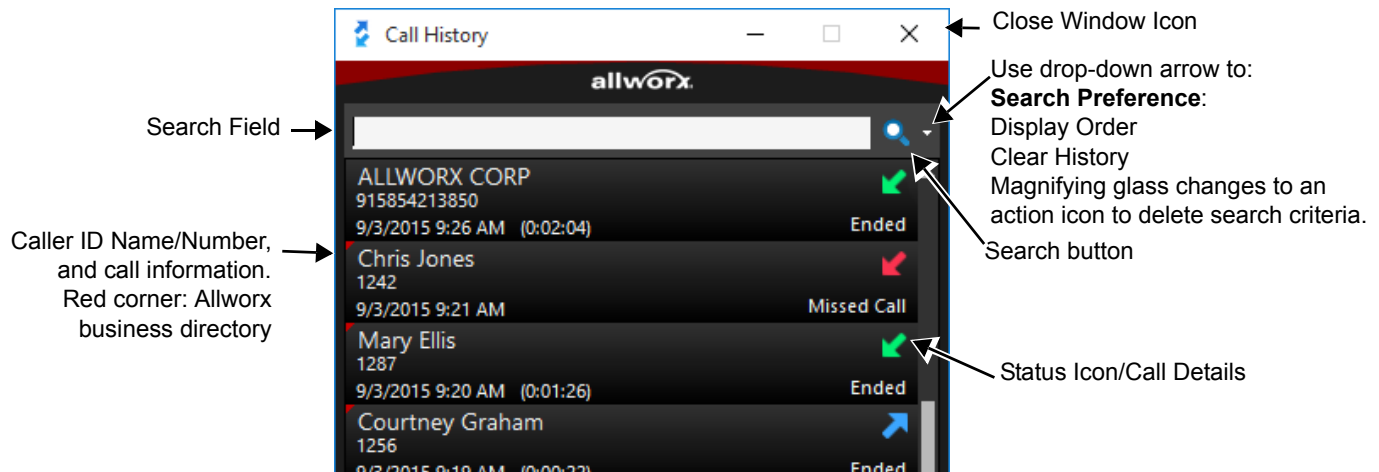
<b>Note:</b>	<p>Interact Professional agents cannot clear the following Busy States:</p> <ul style="list-style-type: none"> <li>• Ringing</li> <li>• On Call</li> <li>• Caller On Hold</li> <li>• Administration functions (i.e. handset is in use)</li> </ul>
--------------	---

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

## 6.3 Call History

The Call History window loads the user call history when first opening the application and continues to provide a listing of the latest 99 entries. The window updates with each call and deletes the oldest Call History list entry as the application adds new entries to the list.

The Interact Professional application displays the caller ID, date/time of call, and status icons. Use this window to place a call, search, change the display order, or clear the call history list.



### To place a call from the Call History window:

Select one of the following options:

- double-click the listing.
- right-click on a Call History listing, and then click:

Dial	Places a call to the listing.
Intercom	Places an Intercom call to the listing.

### To do a Search within the Call History window:

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

1. (optional) Click the drop-down arrow next to the magnifying glass. select the Search Preference.

All Fields (Default)	Display listings with any field matching the search criteria.
Full name	Display the caller ID names matching the search criteria.
Number	Display the caller ID numbers matching the search criteria.
Date/Time	Display listings with a date/time stamp matching the search criteria.

2. Type the search criteria in the field. The application displays the call listings matching the Search field information in the Call History window.

To clear the search field criteria, click the **X** next to the field.

**To change the Call History window display order:**

Select how the call history window displays the listings.

1. Click the drop-down arrow next to the magnifying glass.
2. Select the Display Order option in the drop-down list, and then the preference. The application Call History window updates the view per the selection.

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

**To clear the call history:**

Delete all listings in the Call History window.

<b>Note:</b>	When performing a clear call history, this also clears the handset call history.
--------------	--

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

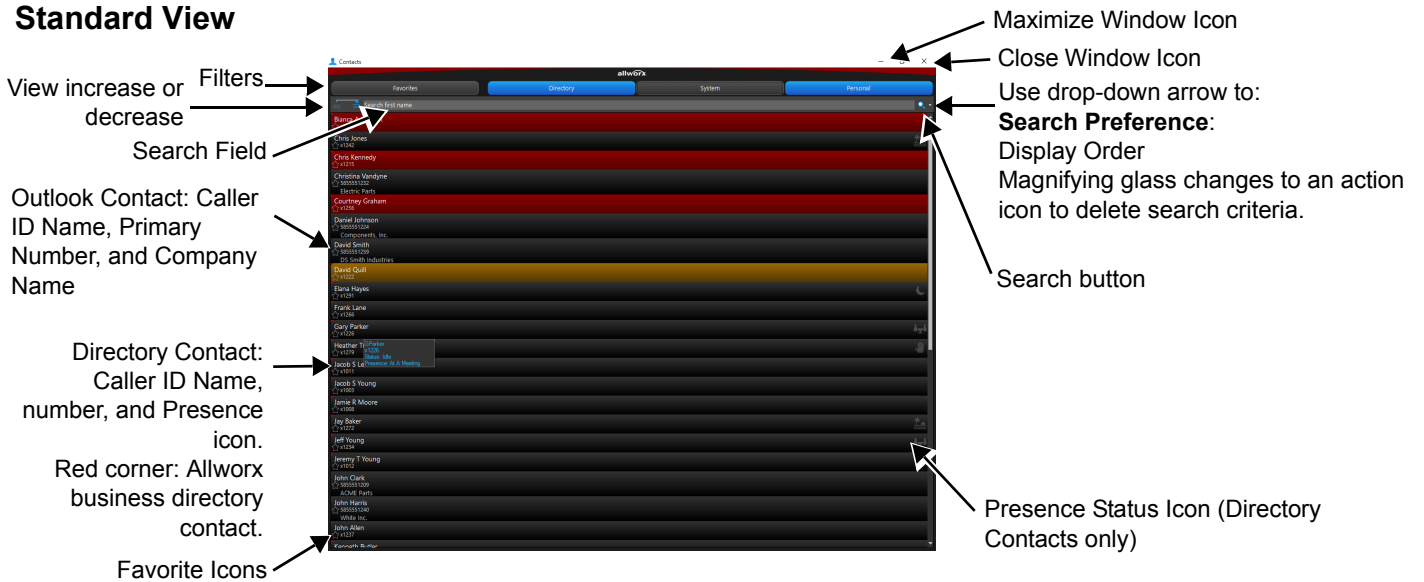
# 6.4 Contacts

The Contacts window displays the contacts from the Allworx business directory and the Microsoft Outlook contacts specific to the user. A standard contact listing displays caller ID name / number, favorite status, and presence status icon (directory contacts) or company name (Microsoft Outlook contacts).

Use this window to filter the contacts, designate favorite contacts, and adjust the Contacts window view. Interact Professional users can place calls, search the contacts using specific criteria, and change the display order.

When undocked (see Overview [page 8](#)), use the window maximize button for a full-screen view of the window.

## Standard View



## Ultra Condensed View



### To use the Contact filters:

Each filter button adds or removes contact entries from the list. Clicking the filter button toggles the contacts view on and off independently of the other filter buttons. The filter remains active after closing and reopening the Interact Professional application.

Favorites	Display only Favorite contacts from business and Microsoft Outlook directories.
Directory	Display the Allworx directory contacts.
System	Display the Allworx Call Monitor, Call Queue, Auto Attendant, and System Paging Zones.
Personal	Display the Outlook contacts.

### To designate favorite contacts:

A blue star displays in the contact listing to indicate the contact is a favorite. To designate or remove a contact as a favorite:

- click on the star icon in the contact listing.
- right-click the contact listing and select **Favorite** from the drop-down list.

### To adjust the contact listing display:

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

Smallest available view	Described as the Ultra condensed view that displays a single-line entry with the username, directory contact icon, and the favorite status icon
Largest available view	Described as the Standard view that displays two lines of information, which also includes the contact number. A Microsoft Outlook contact has three lines of information, which also includes the company name, if available.
All other views	Other views vary in the display of the user name, directory contact icon, and favorite status icon. In the example above, shown as Condensed View.

The Contact window displays a directory contact indicator and a status for each contact listing using color-coding for 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

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



**To place a call:**

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

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

**To pick-up another user’s call from the Contacts window:**

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

**To identify business and personal contacts:**

The Contacts window displays the contacts from the Allworx server for the Directory contacts and the Microsoft Outlook application for Personal contacts

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

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

Directory Contact	Microsoft Outlook Contact
<ul style="list-style-type: none"> <li>• Caller ID name and number</li> <li>• Current status</li> <li>• Presence</li> <li>• Call duration (active call only)</li> </ul>	<ul style="list-style-type: none"> <li>• Caller ID name and number</li> <li>• Company name, if available</li> </ul>

**To specify the primary number of a personal contact:**

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

**To search within the Contacts window:**

Provide criteria in the search field and locate a specific call history listing. When selecting a search preference, it is still active after closing and reopening the Interact Professional application.

1. (optional) Click the drop-down arrow next to the magnifying glass and select the Search Preference from the list.

All Fields (Default)	Display listings with any field matching the search criteria.
Full name	Display the caller ID names matching the search criteria.
First Name	Displays the caller ID first names matching the search criteria.
Last Name	Displays the caller ID last names matching the search criteria.
Company Name	Displays the Corporate names matching the search criteria (from Microsoft Outlook only)
Number	Display the caller ID numbers matching the search criteria.

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

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

**To change the Contacts window display order:**

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

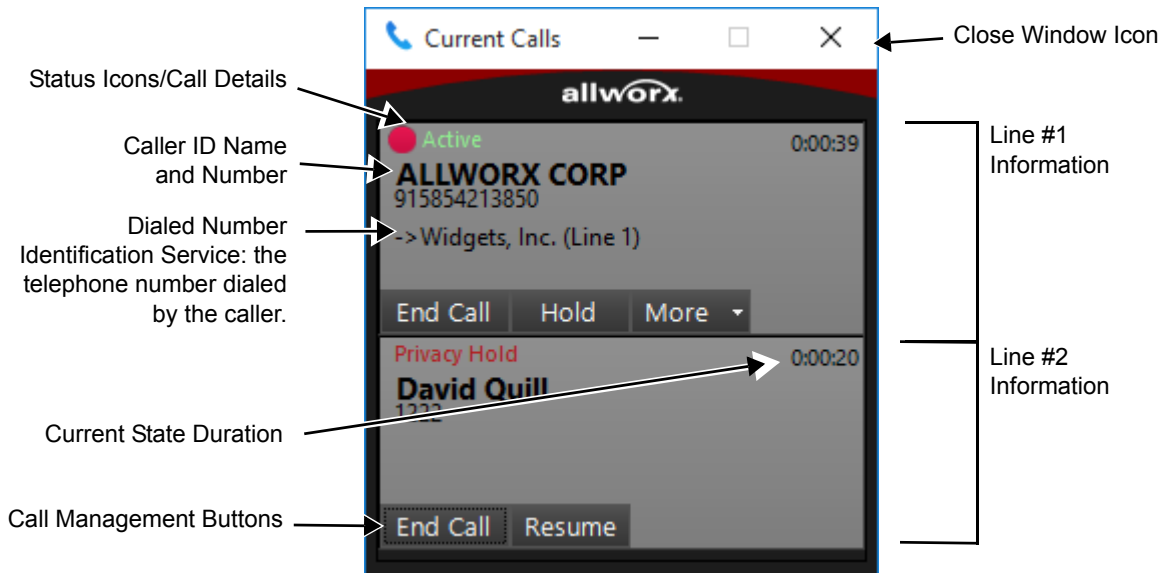
1. Click the drop-down arrow next to the magnifying glass.
2. Select the Display Order option in the drop-down list, and then the preference. The application window updates the view per selection.

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

## 6.5 Current Calls

The Current Calls window displays all active and on hold calls for the handset connected to the Interact Professional application. The application automatically searches the personal contacts during a new call and displays the contact name, if the number matches any of the numbers in the contact number list. Listen to the call through the phone speaker, a headset, or by picking up the phone handset. Close the Interact Professional application without affecting the current phone state such as disconnecting the current call.

Use this window to place a call on hold, transfer a call, create a conference call, or end the call.



<b>Note:</b>	To avoid disconnecting a call, configure the Allworx handset. On the handset, navigate to <b>CONFIG &gt; Preferences &gt; Auto On Hold</b> . Select <b>Enabled</b> and exit the menu.
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### To place a call on hold:

See [“Place a Call On Hold” on page 17](#) for more information.

### To transfer a call in the Allworx Interact Professional application:

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

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

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

### Transfer shortcuts:

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

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

\* 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 window displays both calls.
3. Click the **More** drop-down arrow, and select **Conference** from the drop-down list to join all callers. This connects both calls to a single, active call. The display shows both calls as in conference.

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

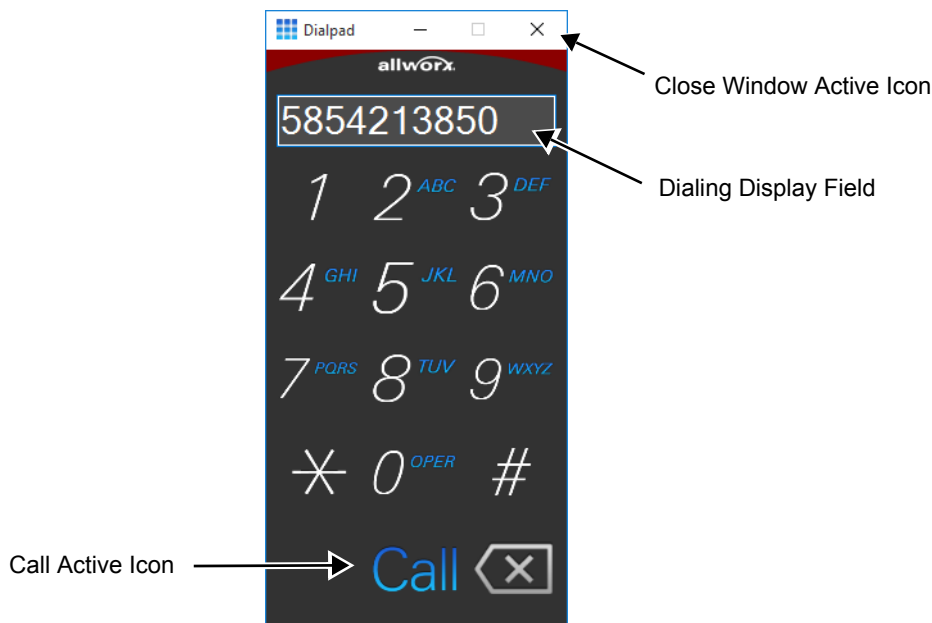
### To end a conference call using the Interact Professional application:

In the Current Calls window, locate a call segment and click **End Call**. Select an option from the drop-down list:

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

## 6.6 Dialpad

Use the Dialpad window to place a phone call instead of using the phone dialpad.



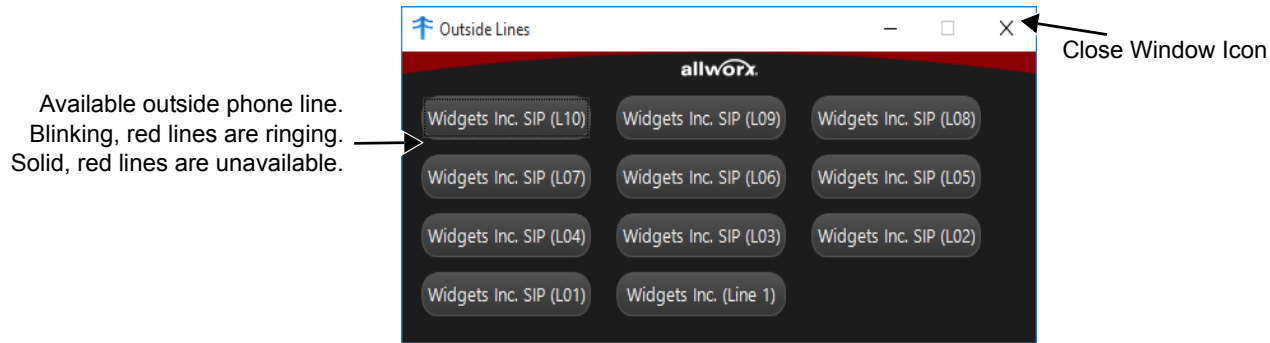
### To place a call using the dialpad:

1. Open the Allworx Interact Professional Dialpad window
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.
3. Click the **Call** active call icon to place the call. **Shortcut:** Double-click the **Call** action icon to redial the last number.

## 6.7 Outside Lines

The Outside Lines window 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 window to answer incoming calls, size a line for outgoing calls, drag-drop an external contact or listing from the Contacts or Call History window to place a call.

Use this window 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 window.
2. Select one of the following options:

Option 1	Option 2
<ol style="list-style-type: none"> <li>1. Click on an available phone line.</li> <li>2. Locate the Dialpad window. Enter the number and click <b>Call</b>.</li> </ol>	<ol style="list-style-type: none"> <li>1. Locate the Contacts or Call History window, and then locate the external contact.</li> <li>2. Drag and drop the contact to an available line in the Outside Lines window.</li> </ol>





3. Use the Current Calls window to further manage the call.

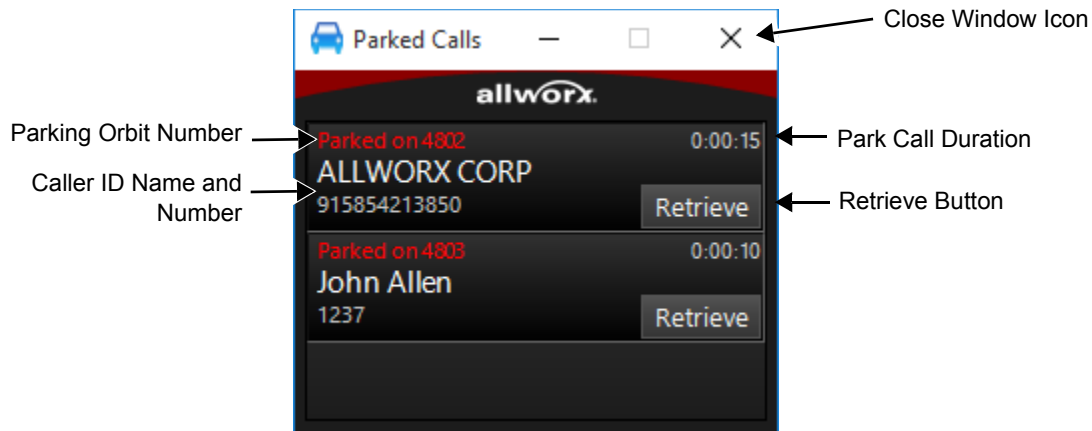
### To answer a call:

1. Open the Outside Lines window.
2. Click the red, blinking phone line.
3. Use the Current Calls window to further manage the call.

## 6.8 Parked Calls

The Parked Calls window displays the status listing of each parked call. The status listing displays the Parking Orbit number, the caller wait duration, and the caller ID name and number.

Use this window to park or retrieve active calls.



### To park a call in the Allworx Interact Professional application:

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

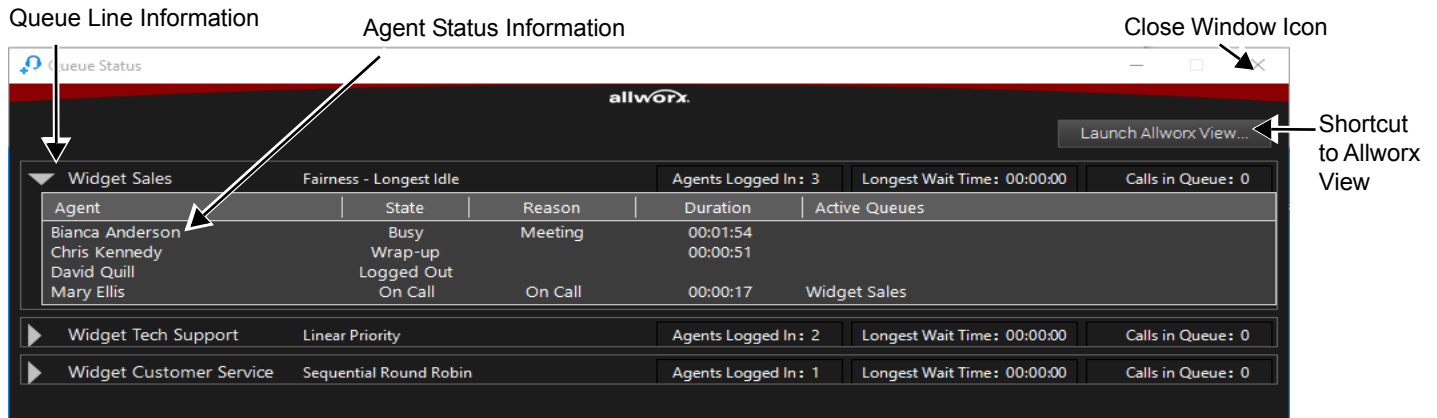
1. Locate the Current Calls Window, and then the current phone call.
2. Click the **More** drop-down arrow, and select **Park** from the drop-down list.

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



## 6.9 Queue Status

The Queue Status window displays the Call Queue and ACD Queue information when the Interact Professional user is a supervisor or agent of the queue, and/or has a Ring All PFK assigned to the handset. Additionally, the Queue Status window provides a shortcut to the Allworx View application.



### 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:

Queue Description*	Name of the queue.
Queue Distribution Mode*	Identifies the calls distribution method: <ul style="list-style-type: none"> <li>• Ring All</li> <li>• Linear Priority</li> <li>• Sequential Round Robin</li> <li>• Fairness - Longest Idle</li> </ul>
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 the queue supervisor can see this information. Click the arrow to the left of the queue description to display the information.

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.

### To access View:

Access detailed Allworx phone system data and usage reporting. Click the **Launch Allworx View...** button 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 application periodically checks for View availability.



# Chapter 7 Troubleshooting

Condition	Description	Solution
<b>Installation</b>		
Interact application provides “Could not access VBScript runtime for custom action” error message.	McAfee anti-virus is interfering with the installation of the Allworx Interact Professional application.	User must do a complete removal of McAfee anti-virus, using the MCPR.exe tool. <ol style="list-style-type: none"> <li>1. Navigate to <b>Start &gt; Control Panel &gt; Programs and Features</b>.</li> <li>2. Locate the McAfee software, and click the <b>Uninstall</b> button at the top of the list.</li> <li>3. Download the MCPR.exe tool from <a href="http://download.mcafee.com/products/licensed/cust_support_patches/MCPR.exe">http://download.mcafee.com/products/licensed/cust_support_patches/MCPR.exe</a>.</li> <li>4. Run the tool.</li> <li>5. Download Microsoft Fixit 50842.msi from <a href="http://go.microsoft.com/?linkid=9804433">http://go.microsoft.com/?linkid=9804433</a>.</li> <li>6. Run the tool.</li> <li>7. Reboot the computer.</li> <li>8. Install the Allworx Interact Professional software.</li> </ol> Note: The Allworx Interact Professional application requires an additional uninstallation and re-installation.
Some pre-requisites could not be installed error message displays and the .NET 4.0 Framework fails to install.	The .NET 4.0 Framework installation requires Administrative privileges.	Contact the Network Administrator to install the .NET 4.0 Framework.
Warning message during the Interact application uninstall process.	In Windows, users can install Interact for multiple user accounts.	Click <b>Continue</b> to un-install the Allworx Interact Professional 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 uninstaller works without regard to version level reported in the control Panel > Programs and Features > Install or change a program page.
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 administrator and retry this installation.	Insufficient PC privileges to install Interact Sync.	Interact continues to install. The Interact Sync application and features are unavailable.  User must run Interact Sync installer as administrator. Interact Sync installer is located at: %localappdata%\Allworx\Interact<current version>\InstallInteractSync.exe.

Condition	Description	Solution
<b>Login</b>		
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 <b>OK</b> to close the Windows Security Alert dialog window. To add the Allworx Server IP: <ul style="list-style-type: none"> <li>• Ask the Allworx administrator the IP address of the server, and enter the IP address manually.</li> <li>• Ask the Allworx administrator to add a firewall exception on the workstation for the Interact Professional application.</li> </ul>
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 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.
<b>Messages</b>		
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: <ul style="list-style-type: none"> <li>• Phone</li> <li>• Computer</li> <li>• Network activity</li> </ul> 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: <ul style="list-style-type: none"> <li>• Phone</li> <li>• Computer</li> <li>• Network activity</li> </ul> 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 <a href="#">"Call Recording" on page 20</a> for more information.
<b>Manage Calls</b>		
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 the outside line access information based on the Dialing Plan External Call access.
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 <b>CONFIG &gt; Preferences &gt; Auto On Hold</b> . Select <b>Enabled</b> and exit the handset configuration menu.

Condition	Description	Solution
The Intercom Call option does not work.	The 9202E model Allworx phone does not support Intercom Calls.	The 9202E model Allworx phone does not support Intercom Calls.

## Windows

The undocked Parked Calls window is empty.	The undocked Parked Calls window does not populate after selecting <b>More &gt; Park</b> or when doing a drag and drop.	Verify with the Network Administrator that the Interact Professional application is on the same network as the handset and network routing is consistent.
Not all the windows display in the Interact Professional.	The Visible Windows setting was changed.	Navigate to <b>Settings &gt; Visible Windows</b> 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 user does not have any outside lines defined for the handset.
Cannot find the personal contacts in the Contact window.	Outlook Interact contacts do not display in the Interact Professional Contact window.	The Interact Professional application requires the Outlook 2010 application to be open prior to launching the application. <ol style="list-style-type: none"> <li>1. Close the Interact Professional application.</li> <li>2. Launch the Outlook 2010 application.</li> <li>3. Restart the Interact Professional application.</li> </ol> The Outlook contacts are now available within the Interact Professional application.
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.

## Interact Sync

Interact Sync is not working.	The Interact Professional application is not synchronizing with the Lync or Skype for Business application.	The Interact Sync application requires Microsoft Lync 2013 or Skype for Business 2015 application to be running. Interact Sync does not work with earlier versions of Lync or Skype for Business.
The Interact Professional presence setting is not synchronizing properly.	The synchronization between the Lync/Skype for Business application and the Interact Professional application is not updating properly.	Do the following: <ul style="list-style-type: none"> <li>• Check the Lync/Skype for Business client is updating properly.</li> <li>• Verify the Interact Sync feature key and application are installed.</li> <li>• Check the settings in <b>Settings &gt; Options &gt; Sync</b>.</li> <li>• Shutdown Lync/Skype for Business and Interact Professional, and then restart in the following order:                             <ul style="list-style-type: none"> <li>• Lync/Skype for Business</li> <li>• Interact Professional</li> </ul> </li> </ul>
The Interact Professional presence does not change per the Outlook calendar.	The Lync/Skype for Business application does not synchronize with the Outlook calendar availability, which synchronizes with the Interact Professional presence setting.	Do the following: <ul style="list-style-type: none"> <li>• Schedule meetings in advance.</li> <li>• Check the Lync/Skype for Business client is updating properly.</li> </ul>

Condition	Description	Solution
<b>Miscellaneous</b>		
The Interact application does not respond. When starting Task Manager, the application does not display in the Applications tab.	Only running applications with a sustained window showing display in the Task Manager Applications list.	<ol style="list-style-type: none"> <li>1. Open the Task Manager and click the Processes tab.</li> <li>2. Locate InteractStartup.exe and right click on it.</li> <li>3. Click <b>End Process</b> to close the application.</li> <li>4. Re-launch the Interact application.</li> </ol>
The font does not look crisp.	Windows XP users may experience bit mapped fonts within the Interact Application.	<ol style="list-style-type: none"> <li>1. Navigate to the computer desktop and right-click on the desktop. Select Properties from the drop-down menu. The Display Properties control panel box displays.</li> <li>2. Click the Appearance tab, and then the <b>Effects...</b> button.</li> <li>3. Click the check box "Use the following method to smooth edges of screen fonts".</li> <li>4. Click the drop-down arrow and select <b>Cleartype</b>.</li> <li>5. Click <b>OK</b>, and then click <b>Apply</b>, and then click <b>OK</b> to save the changes.</li> </ol>
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 <a href="#">"Call Recording" on page 20</a> for more information.
Cannot find the Launch Allworx View... button.	The Launch Allworx View... button is not available in the Queue status window, the Device Status Options drop-down list, or the System Tray options.	<p>The Launch Allworx View... button is unavailable until the Allworx administrator installs the View CDR feature key and establishes a connection between the Allworx server and the View server.</p> <p>Interact is unable to validate the default View application link.</p>





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