



# Allworx Interact Customer Training

2022

# Interact Professional & Softphone

- **Allworx Interact Professional & Softphone**
- **Difference between Interact Pro & Interact Softphone**
  - › 99.9% same as of today
  - › Interact Softphone does NOT require an Allworx phone
  - › Messages Pane

# Interact Professional Dashboard



# Interact Pro Dashboard



**TO DOWNLOAD THE SOFTPHONE APPLICATION:**

**[HTTPS://GET.ALLWORX.COM/INTERACT](https://get.allworx.com/interact)**

**Choose End User Installer**

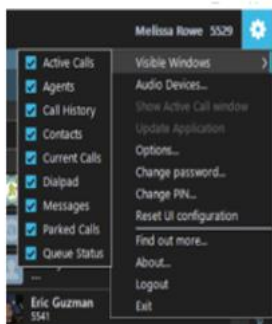
# Interact Pro Dashboard

## SETTINGS

The Settings menu enables managing the Interact or Interact Professional application. Click the (⚙️) navigation icon to access the settings, and then select one of following options:

### 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.



**Active Calls:** Displays all active calls in the system

**Agents:** Specific to Call Center Queue Agents

**Call History:** Displays your full call history

**Contacts:** Users: All users on the phone systems

System: System extensions to include public speed dial

Personal: Personal that are imported from Outlook,

Gmail, etc., and mobile device

**Current Calls:** Your current/active calls

**Dialpad:** Dialpad to dial from your PC

**Messages:** Voicemail (only available on Softphone)

**Parked Calls:** Displays all parked calls

**Queue Status:** Specific to Call Center Queues only

## STATUS ICONS

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

	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 icon - 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.


# Interact Pro Dashboard

## CALL HISTORY

Search Field

Call History Listings

- Caller image (if available), red corner indicates Allworx business directory contact.



Hide Window Icon

Use drop-down arrow to

- Display Order
- Search By
- Search Preference
- Clear History

Caller Image	Caller Name & Number	Date & Time	Status Icon & Label
	Sally H Davis 1107	1/13/2017 3...	Ended
	Frank Lane 1133	1/13/2017 9...	Ended
	Sally H Davis 1107	1/12/20...	No Answer
	Jay Baker 1131	1/12/20...	Elsewhere
	Sally H Davis 1107	1/11/20...	No Answer
	Sally H Davis 1107	1/11/2017 ...	Missed
	Unknown 4215526	1/1...	Check Number

- Transferred
- Ended
- Parked <orbit number>
- No Answer
- Missed
- Check
- Elsewhere

call forwarded to another recipient

normal call ended

call placed into a Parking Orbit

outbound call that is not answered (internal calls only).

inbound call that rings, but it is not answered.

failed to route to an outbound call

missed inbound, picked up somewhere else, i.e., Reach Device

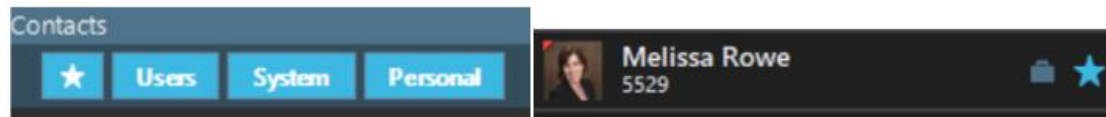


# Interact Pro Dashboard

## CONTACTS

The Allworx System supports four types of contacts on the Verge IP phone series:

- User and System contacts – contacts with an internal Allworx extension assigned. The Allworx Server Administrator manages these contacts.
- Public Contacts – system-wide contacts (formerly known as Speed Dial). The Allworx Server Administrator manages these contacts.
- Personal Contacts – (only available on Allworx systems with a Connect server) contacts managed by the Allworx user.
  - **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 application.
  - **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 email account or an Outlook email account.



- Click & highlight the contacts to be visible (will be highlighted in [BLUE](#))
- Click on the star to make a contact a FAVORITE.
- To see only [FAVORITES](#) highlight the star



Indication = On the phone



Indication = Do Not Disturb (DND)

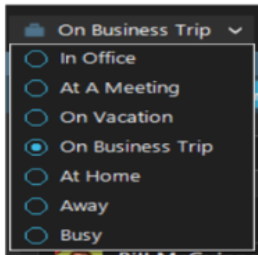
# Interact Pro Dashboard

## PRESENCE STATUS

The Presence icon shows the user contact availability status. A presence other than In Office displays the presence status icon for the selected presence.

### To change the status:

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



## DND



To activate DND

Click the **DND** button (D).

- 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 (D) a second time.

## 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 **Mute** button (M).

To deactivate Mute

Click the **Mute** button (M) a second time.

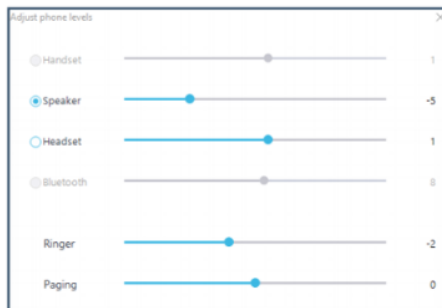


# Interact Pro Dashboard

## VOLUME CONTROL



Click the Volume Control button 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 require a device connected to the Allworx phone.



## ADD NEW PERSONAL CONTACT



## INCREASE/DESCREASE DENSITY DIPLAY OF CONTACTS

Low, Medium or High



## CONTACT DISPLAY ORDER



# Interact Pro Dashboard

## 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 search field.
2. Select the Display Order option in the drop-down list, and then the preference. The application window updates the view per selection.

First Name	Arrange the contacts by the caller ID first names. 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)

## MAKING A CALL

### To place a call using the handset:

Pick up the handset or press the handset speaker phone soft key, and then 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:

Locate a listing in the window, and then select by double-clicking the listing or right-clicking the listing and selecting **Dial** or **Intercom**. If the Allworx User Contact is busy, right-click the contact (Contacts window only) and select **Notify when available**. When the Allworx User extension becomes available, the Interact Professional application displays a pop-up notification message.

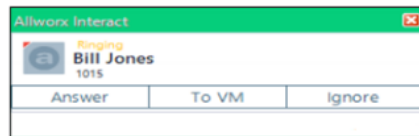
# Interact Pro Dashboard

## ANSWERING A CALL

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:

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	Opens the minimized Interact Professional / Interact Softphone expanded user interface.



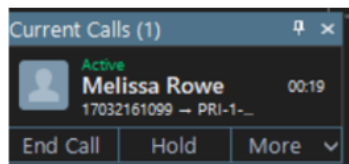
## HOLD

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



# Interact Pro Dashboard

## TRANSFERRING A CALL

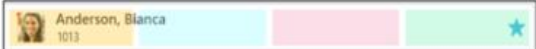
To transfer a call using the expanded Interact user interface

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
<i>Blind Transfer</i>	Place the call unannounced to an extension or external phone number.
<i>Attended Transfer</i>	Place the call announced to an extension or external phone number.
<i>Transfer to my voicemail</i>	Place the call directly to that user's voicemail. This option only: The call transfers immediately and no longer displays in the <i>Current Calls</i> pane.
<i>Transfer to voicemail</i>	Place the call directly to another user's voicemail.
<i>System Park</i>	Place the call in a Parking Orbit. The Parking Orbit number for a short period of time.
<i>Park To</i>	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	<p>Perform a blind transfer by moving the call to a listing in the <i>Call History</i> or <i>Contacts</i> pane. Release the left mouse button to immediately connect the two calls.</p> <p>When <i>Use drop targets</i> 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 <i>Attended Transfer</i>, to the yellow area to complete a <i>Blind Transfer</i>, to the green area to complete a <i>Park to</i>, and the pink area to complete a transfer <i>To VM</i> (voicemail).</p> 

# Interact Pro Dashboard

## CONFERENCE CALLING

### 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.

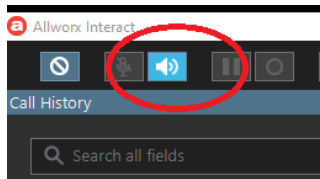


### To end a conference call using the Interact Professional user interface:

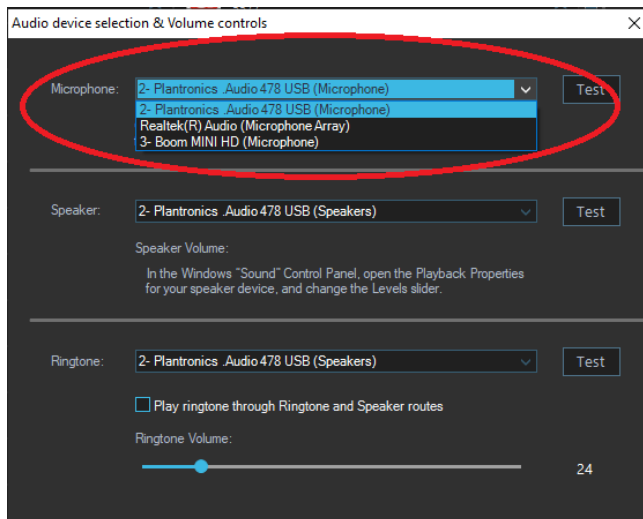
In the *Current Calls* pane, locate a call segment and click **End Call**. Select one of the following options from the drop-down list:

Option	Description
End This Call	Disconnects the specific active call participating in the conference call, and the active call no longer displays in the <i>Current Calls</i> pane. The other active call(s) in the conference remain active, and the <i>Current Calls</i> 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 <b>Continue without me</b> option, the status of the active calls in the <i>Current Calls</i> pane updates to <i>Calls Connected</i> , 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.

# Interact Pro Adjust Audio



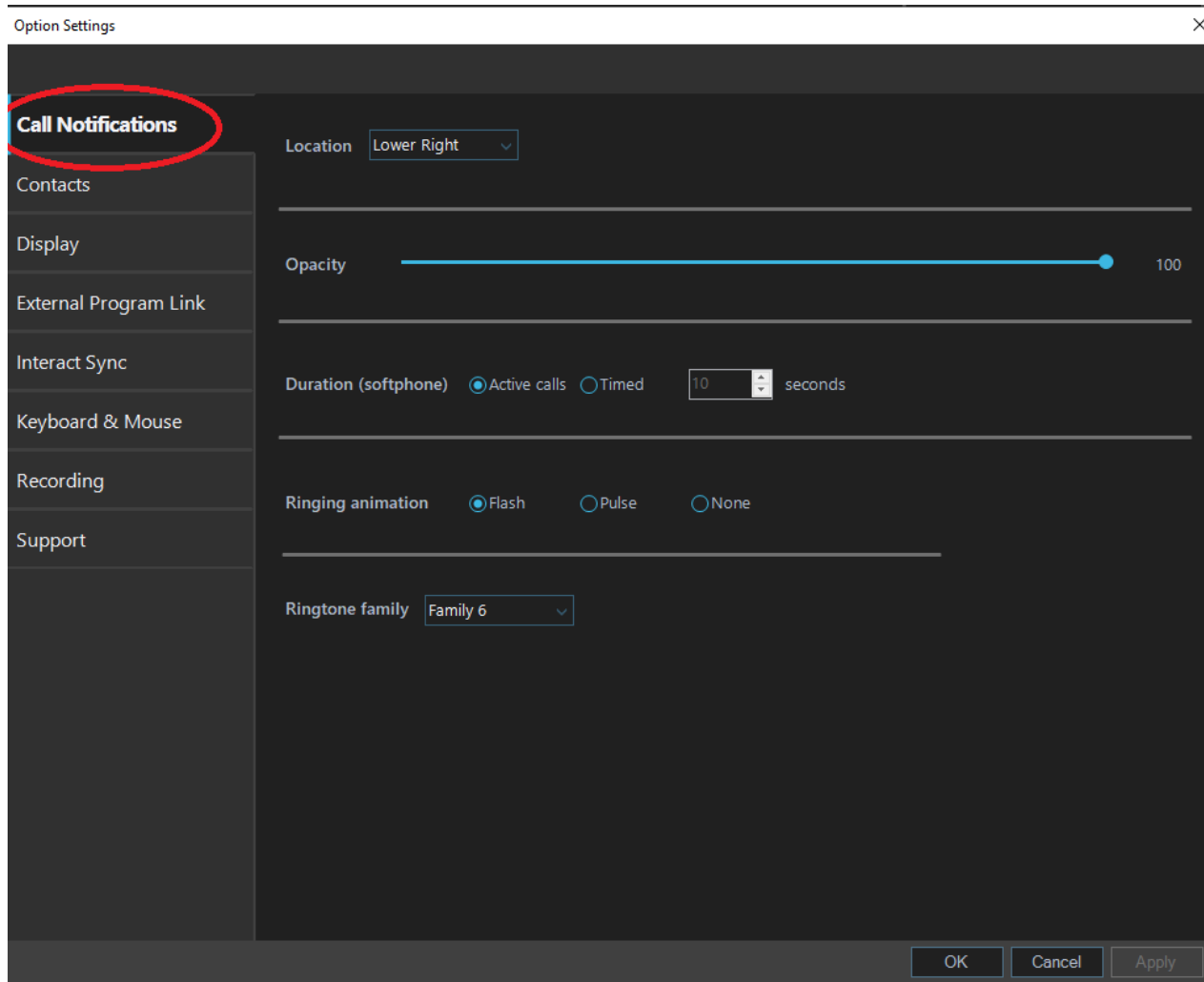
Press the Speaker Icon



Choose Microphone  
Choose Speaker  
Choose Ringtone  
Ringtone Volume



# Interact Pro Call Notifications



# Interact Pro Contacts

Option Settings

Call Notifications

**Contacts**

Display

External Program Link


Interact Sync

Keyboard & Mouse

Recording

Support

**My Allworx directory image**



Select an image that will be stored on the server and associated with your directory entry. This is the image that other users will see beside your name in the directory listing.

Change the image

Clear the image

**Outlook Integration**

Contact integration with Outlook is disabled. Interact will not get any contact information from Outlook.

Enable

**Contact Accounts**

Interact can display your personal contacts on all of your Allworx apps and devices. How would you like Interact to handle your contacts?

**Import / export personal contacts**

Allows you to import contacts from a CSV or vCard file into your personal contacts, which will be stored on the Allworx system. You can also export your personal contacts to a file for backup purposes, or to import into another application.

Import from file

Export to CSV file

Export to vCard file

Delay after application start before connecting to Outlook: 15 seconds

Refresh contacts

OK

Cancel

Apply

# Interact Pro Display

Option Settings ✕

Call Notifications

Contacts

**Display**

External Program Link

Interact Sync

Keyboard & Mouse

Recording

Support

Select a color theme for the Interact application.

☐ Light Theme    ☒ Dark Theme

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Sleep Options: Interact can prevent your PC from going to sleep, so you don't miss calls

☐ Allow Sleep    ☒ Stay Awake    ☐ Stay Awake (Keep Display On)

OK

Cancel

Apply

# Interact Pro External Program Link

Option Settings

Call Notifications

Contacts

Display

**External Program Link**

Interact Sync

Keyboard & Mouse

Recording

Support

► Description

► NetSuite 0

▼ Salesforce (only non-contact, only external)

Rule name: Salesforce

▼ Action to perform

Type of action: ☒ URL ☐ CMD shell script

https://na13.salesforce.com/search/SearchResults?searchType=2&str=%CALLNUM%

Macros: %CALLNUM% Insert selected macro

► Macro expansion options

▼ When to perform this action

☐ 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 perform for internal calls

Select appearances (Advanced)

► NetSuite2 Melissa 0

Add a new rule

OK Cancel Apply

# Interact Pro Interact Sync

Option Settings

Call Notifications

Contacts

Display

External Program Link

**Interact Sync**

Keyboard & Mouse

Recording

Support

The Interact Sync feature allows Interact Professional to communicate with other applications running on your PC. This enables click-to-dial from your communications and web browser applications, and synchronization of your presence status between Allworx and Microsoft applications.

▶ Click-to-dial options

▼ Presence synchronization options

This section allows you to configure the ways that your Skype for Business Availability, along with your Outlook appointments, can affect your Allworx Presence and phone Do Not Disturb setting.

Enable All

Disable All

▶ Availability and phone calls

▶ Availability and Allworx Presence

▶ Availability and phone DND setting

▼ Appointments and Allworx Presence

Default Presence for calendar appointments: 

In Office

Do not modify my Presence for appointments with a "Show As" value of:

☒ Free

☒ Tentative

▼ Override options

The following options will allow you to temporarily disable synchronization between your Allworx Presence and your Microsoft applications. These overrides affect both Availability synchronization and appointment synchronization.

Ignore Availability changes when I manually set my Presence to:

OK

Cancel

Apply

# Interact Pro Keyboard Shortcuts

Option Settings

Call Notifications

Contacts

Display

External Program Link

Interact Sync

**Keyboard & Mouse**

Recording

Support

▼ **Keyboard Shortcuts**

The following keyboard shortcuts are available for common Interact Professional functions. You can customize the combination of keys used to initiate the shortcuts, but be aware that these shortcuts are in effect globally on your PC, and will work even when Interact is not the focused application. Choose your shortcut keys wisely so that they don't conflict with shortcuts you use in other applications.

Enabled	Command	Keyboard Shortcut
<input checked="" type="checkbox"/>	Answer Incoming Call	<input type="text" value="Win + Shift + A"/>
<input checked="" type="checkbox"/>	End Current Call	<input type="text" value="Win + Shift + E"/>
<input checked="" type="checkbox"/>	Hold Current Call	<input type="text" value="Win + Shift + H"/>

▼ **Drag-and-Drop From Current Calls**

Drag-and-Drop Behavior

☐ Use legacy drag-and-drop behavior

When legacy behavior is enabled, you can use either the left or right mouse button to drag a call from the Current Calls window to a contact in the Contacts window or the Call History window. If the left mouse button is used, then the Interact application will perform a Blind Transfer. If the right mouse button is used, then you will be able to select the operation to perform from a popup menu.

☒ Use drop targets

When drop targets are enabled, you can drag a call from the Current Calls window to a contact in either the Contacts window or the Call History window. Each contact will display multiple colored targets indicating what drag-and-drop operations are supported by the contact. Dropping the call onto one of these targets will perform the associated operation.

Drop Target Filter Keys

While dragging a call, you can press and hold a key on the keyboard to limit the selection of drop targets. You can customize these filter keys below.

Blind Transfer

Attended Transfer

To VM

Park To

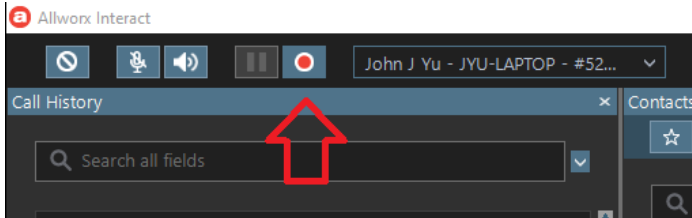
OK

Cancel

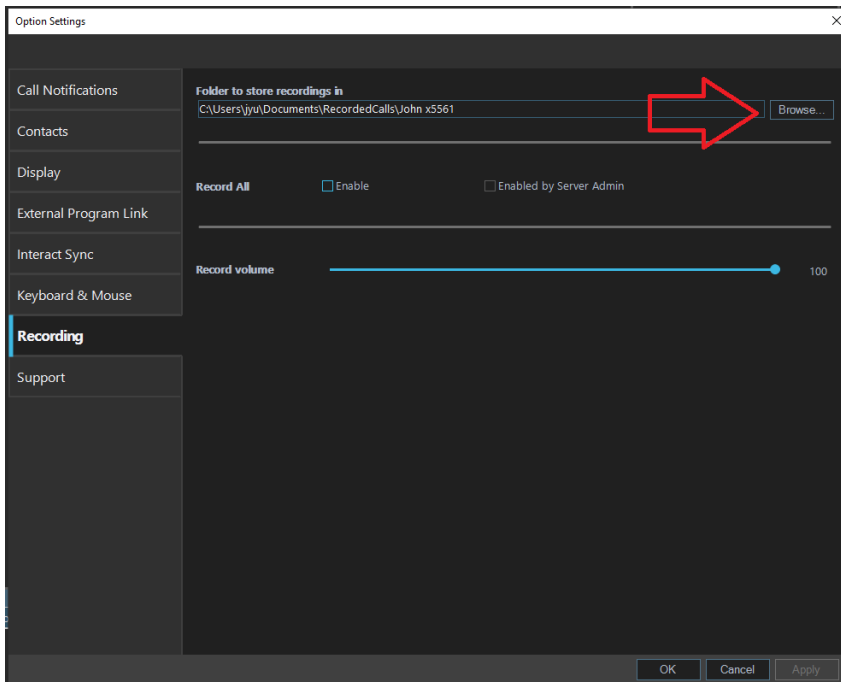
Apply



# Interact Pro Call Recording



On an ACTIVE Call,  
press the red circle to  
start recording



Destination Folder can  
be defined in Option  
Settings> Recording

# Interact Pro Support

Option Settings

Call Notifications

Contacts

Display

External Program Link

Interact Sync

Keyboard & Mouse

Recording

Support

▶ Contact Information (Optional)

▼ Contacting Allworx

There are multiple ways to send bug reports, comments, and suggestions to Allworx.

• Send application logs to Allworx Support

1. Create a problem report using this button

Save logs to zip file...

2. Email those logs to <readonly@allworx.com>

[Click here](#) to open your email client

• Or submit comments and suggestions to our feedback site: [feedback.allworx.com](https://feedback.allworx.com)

▶ Customer Experience Improvement Program

☒ YES - I want to help improve the Interact application.

OK

Cancel

Apply



Thank you.  
Questions?