

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

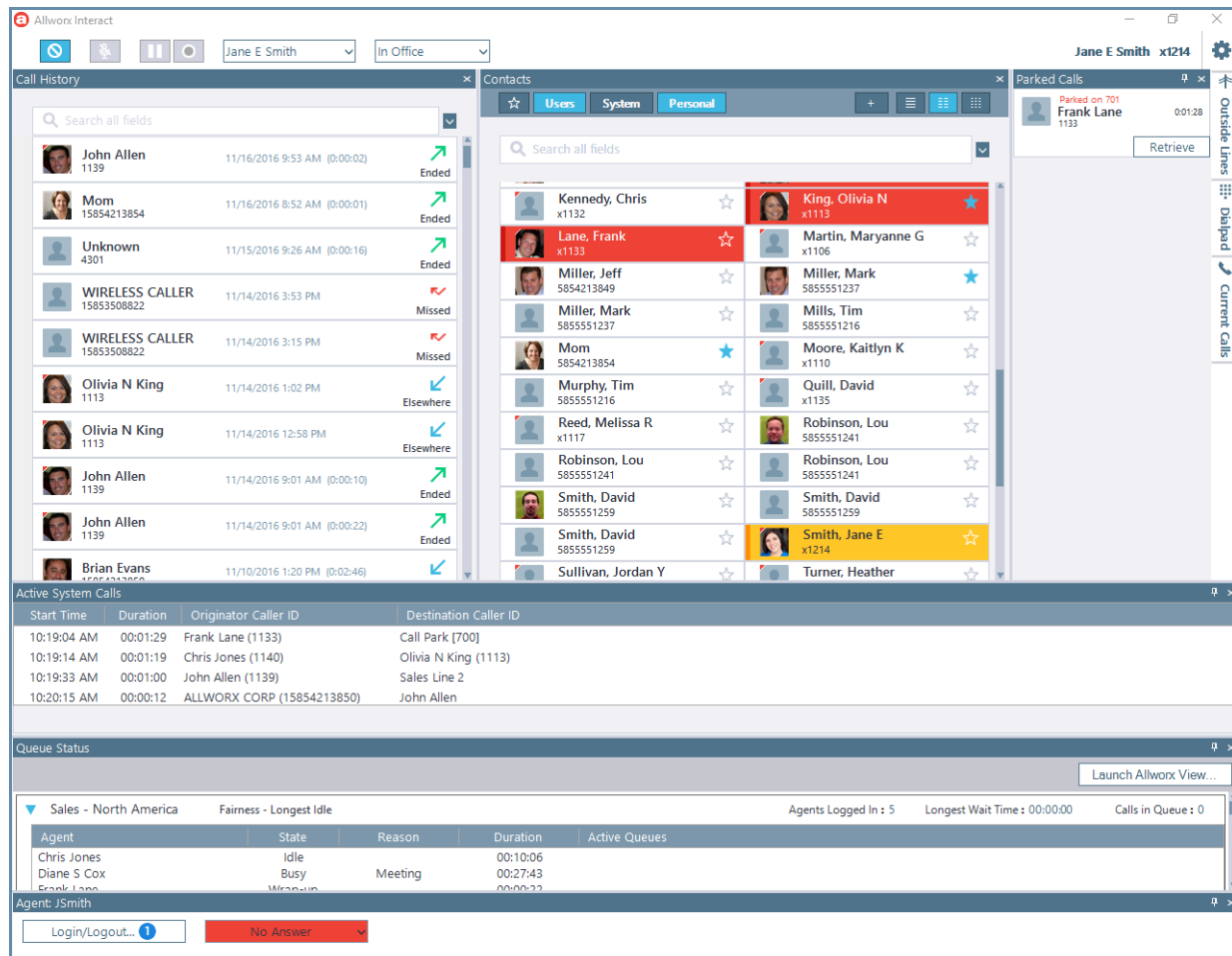
Version 3.0

Updated 12/21/2016





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



## Version 3.0



©2016 Allworx Corp, a Windstream company. All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopy, recording, or otherwise without the prior written permission of Allworx Corp.

Software in this product is Copyright 2016 Allworx Corp, a Windstream company, or its vendors. All rights are reserved. The software is protected by United States of America copyright laws and international treaty provisions applicable worldwide. Under such laws, the licensee is entitled to use the copy of the software incorporated with the instrument as intended in the operation of the product in which it is embedded. The software may not be copied, decompiled, reverse-engineered, disassembled, or otherwise reduced to human-perceivable form. This is not the sale of the software or any copy of the software; all right, title, ownership of the software remains with Allworx or its vendors.

The following trademarks are owned by Allworx:

Allworx® Verge™ IP phone series  
Allworx® 92xx™ IP phone series  
Allworx® Verge™ 9308  
Allworx® Verge™ 9312  
Allworx® Verge™ 9318Ex

Allworx® Reach™  
Allworx® Reach Link™

Allworx® Interact™  
Allworx® Interact™ Professional  
Allworx® Interact Sync™

Allworx® Px 6/2 Expander

Allworx® View™  
Allworx® View™ ACD

Allworx® OfficeSafe™  
Allworx® Migrate™

Allworx® Connect™ servers  
Allworx® Connect™ 731 server  
Allworx® Connect™ 536/530 server  
Allworx® Connect™ 536 server  
Allworx® Connect™ 530 server  
Allworx® Connect™ 324/320 server  
Allworx® Connect™ 324 server  
Allworx® Connect™ 320 server

# Content

---

<b>1 - Introduction .....</b>	<b>1</b>
1.1 - Equipment Requirements .....	1
1.2 - Product Comparison .....	2
<b>2 - Setup .....</b>	<b>5</b>
2.1 - Installation Checklist .....	5
2.2 - Install and Log In .....	5
2.3 - Change the Allworx Password or Allworx PIN .....	7
<b>3 - Overview .....</b>	<b>9</b>
3.1 - System Tray .....	11
3.2 - Icons .....	12
3.2.1 - Navigation Icons .....	12
3.2.2 - Status Icons .....	12
3.2.3 - Action Icons .....	12
3.3 - Wipe Current Device .....	13
3.4 - Interact Sync .....	13
<b>4 - Manage Calls .....</b>	<b>15</b>
4.1 - Place a Call .....	15
4.2 - Intercom Call .....	18
4.3 - Answer a Call .....	18
4.4 - Place a Call On Hold .....	19
4.5 - End a Call .....	19
<b>5 - Status Bar .....</b>	<b>21</b>
5.1 - DND (Do not Disturb) .....	21
5.2 - Mute .....	21
5.3 - Call Recording .....	22
5.4 - Station Appearance .....	23
5.5 - Presence .....	23
5.6 - Settings .....	24

5.7 - Update the Options .....	25
5.7.1 - Call Notifications .....	25
5.7.2 - Contacts .....	25
5.7.3 - Recording .....	26
5.8 - Interact Sync settings .....	27
5.8.1 - External Program Link .....	29
<b>6 - Windows .....</b>	<b>31</b>
6.1 - Active System Call .....	31
6.2 - Agent: <name> .....	32
6.3 - Call History .....	33
6.4 - Contacts .....	35
6.5 - Current Calls .....	41
6.6 - Dialpad .....	44
6.7 - Outside Lines .....	45
6.8 - Parked Calls .....	46
6.9 - Queue Status .....	47
<b>7 - Interact Sync .....</b>	<b>49</b>
7.1 - Set Interact Sync as the Default Dialing Application .....	49
7.2 - Click-to-dial with Google Chrome or Mozilla Firefox Web Browser .....	51
7.3 - Click-to-dial with Microsoft Outlook .....	52
7.4 - Presence Synchronization with Microsoft Outlook .....	53
<b>8 - Troubleshooting .....</b>	<b>55</b>

# Chapter 1 Introduction

Allworx Interact™ provides Windows PC users an intuitive, configurable user interface for controlling an Allworx IP 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 contacts. The Contacts window provides contact information, Allworx user presence, availability status, and favorite status. 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 document.

Equipment	Requirements
PC	<div><div><div><div>• Running OS described below:</div><div><div>• Windows 7 32-bit SP1</div><div>• Windows 8 32-bit</div><div>• Windows 8.1 32-bit</div><div>• Windows 10 32-bit</div></div></div><div><div>• Windows 7 64-bit SP1</div><div>• Windows 8 64-bit</div><div>• Windows 8.1 64-bit</div><div>• Windows 10 64-bit</div></div></div><div><div>• RAM minimum: 2 GB</div><div>• Monitor resolution: 1024 x 768 (XGA)</div><div>• Interact or Interact Professional application</div><div>• Interact Sync</div><div>• Internet connection</div><div>• Microsoft .NET Framework 4.0</div><div>• Allworx username and password</div></div></div>
Allworx server	<div><div>• Allworx System Software Version 8.2 (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.</div><div>• IP Address or DNS name Allworx server</div><div>• Feature key for Interact Professional (not required for all operations in this document)</div><div>• Feature key for Interact Sync</div><div>• Feature key Automatic Call Distribution</div><div>• Visibility to the Allworx View Server (also requires the View CDR function key - minimum)</div></div>
Allworx IP phone	

## 1.2 Product Comparison

	Interact	Interact Professional
<b>Call Handling</b>		
Answer / Ignore / End / Place on hold	X	X
Transfer / Park / Conference		X
<b>Interact Features</b>		
Access to the Allworx system 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 <sup>1</sup>		X
Access to call queue agent status (call supervisors only) <sup>1</sup>		X
Wipe current device	X	X
Change Allworx Password	X	X
Intercom call		X
Call queue features <sup>1</sup>		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 <sup>1</sup>		X
Launch the Allworx View application <sup>2</sup>		X
<b>Requires Allworx System Software 8.0.8.6 or later</b>		
Interact Sync <sup>3</sup>		X
<b>Requires Allworx System Software 8.1</b>		
Five- and six-digit extension dialing		X
<b>Requires Allworx System Software 8.2</b>		
Contact Support <sup>4</sup>		X
Bluetooth Support <sup>5</sup>		X
Call Handoff <sup>5</sup>		X
<sup>1</sup> 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.		



	Interact	Interact Professional
<sup>2</sup> Requires the following: Allworx View CDR feature key. Connection between the Allworx server and the View server.		
<sup>3</sup> 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 or 2016 installed Microsoft Outlook 2010, 2013, or 2016 installed Google Chrome™ version 41.0.2272 (minimum) Mozilla Firefox® Version 38.0 (minimum)		
<sup>4</sup> Requires the following: Personal Contact management requires an Allworx Connect series server		
<sup>5</sup> Requires the following: Verge 9312 IP Phone		



## Chapter 2 Setup

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.	
<b>Download and Install the Interact Application</b>		
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 5.</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.	
<b>Log in to the Interact Application</b>		
10	Launch the Interact application	For more detailed information, see <a href="#">"To log into the application:" on page 6.</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>• At least one of:               <ul style="list-style-type: none"> <li>• Microsoft Lync 2013 or Skype for Business 2015 or 2016 installed</li> <li>• Microsoft Outlook 2010, 2013, or 2016 installed</li> <li>• Google Chrome</li> <li>• Mozilla Firefox</li> </ul> </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 **Yes** at the User Account Control window, if prompted.
7. 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, one or more notifications may display:

Install Interact Sync	Displays when the Interact Sync option is not installed and to inform users the additional benefits of installing Interact Sync to use with Interact Professional. Select an available option. Recommended: <b>Install Interact Sync now (Administrator access required)</b> .
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.
Set your user image	Displays when the logged in user does not have a contact image. Click <b>Yes</b> to update the contact image or click <b>No</b> to continue.
Sync contacts with Outlook	Displays the first time the Interact Professional user logs in to synchronize Outlook contacts with Personal Contacts. <b>NOTE:</b> this is on available on Verge IP phones using a Connect server.
New Outlook contacts found	Displays when the Interact application has found new Personal Contacts in the Outlook application. <b>NOTE:</b> this is only available on Verge IP phones using a Connect server.

- Download the supporting documentation from <http://get.allworx.com/Interact>.
- Place a test phone call. See [“Manage Calls” on page 15](#) for more information.

## 2.3 Change the Allworx Password or Allworx PIN

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

### To change the login password or PIN:

- Log in the application, and then locate and click:

Option	Interact	Interact Professional
Interact Icon in the Windows System Tray > Settings and select: <b>Change Password...</b> or <b>Change PIN...</b>	X	X
Application Options menu > Settings and select: <b>Change Password...</b> or Change PIN...		X

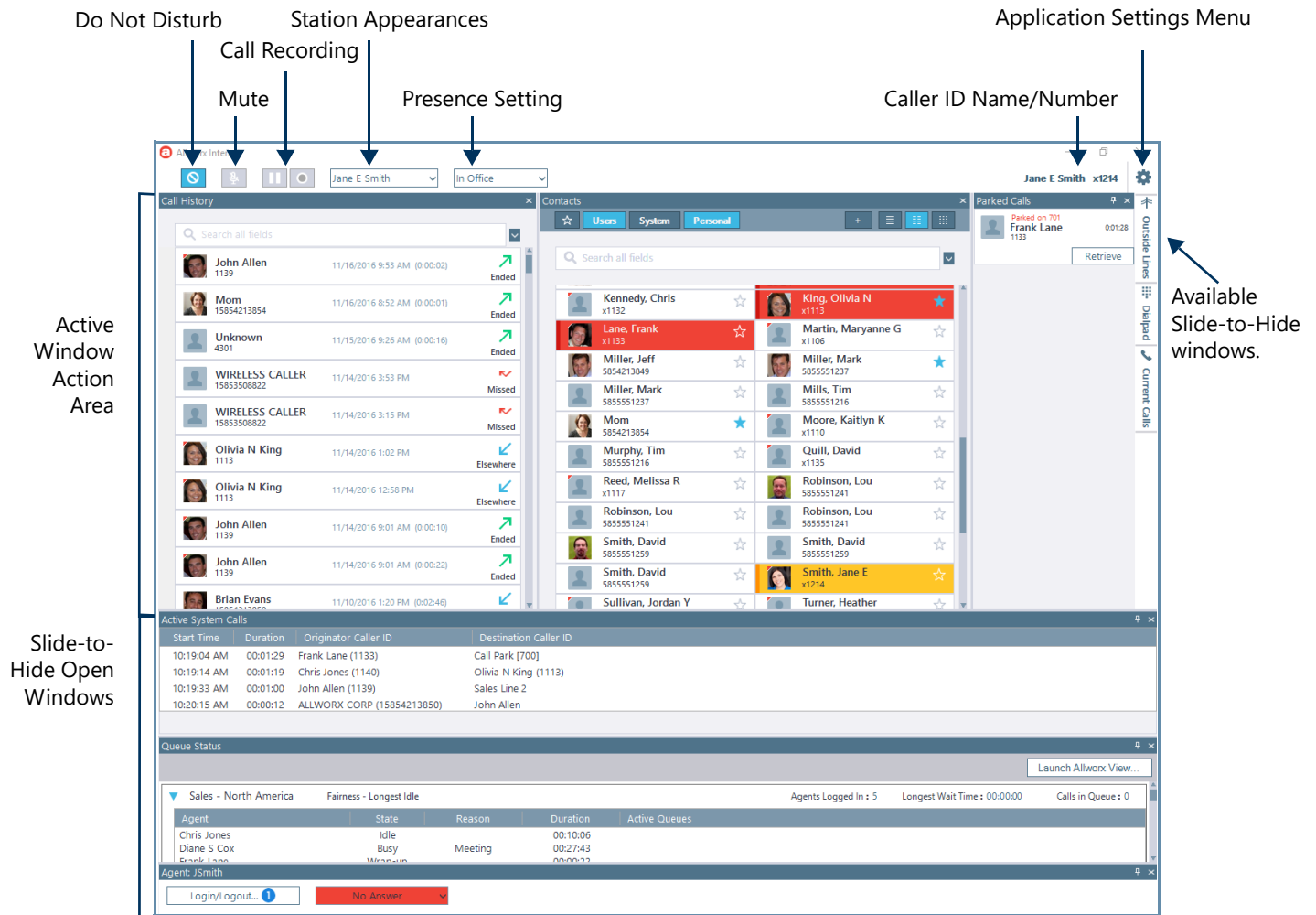
- Enter the required information, and then click **OK**. A notification displays indicating the request was successful. Click **OK** to return to the application.



# 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, Allworx Contacts, and Personal Contacts. Each window is described in more detail later in this User Guide.

The Interact Professional application uses visual cues for call status and User Contact presence, availability, and favorite status. Interact Professional Screen example:



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	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 visible while docked in one of the slide-to-hide panels.
Resize	Open each window within the main application screen and manage the windows size without using valuable computer screen space.
Undock or dock	Place the windows on top or under the main application menu window (maximized applications can obscure the view).
	<p>Undocked windows</p> <p>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.</p> <p>To undock the window:</p> <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 title bar of the application window.</li> <li>3. Move and adjust the window.</li> </ol>



Undock or dock  
(con't)

Docked windows

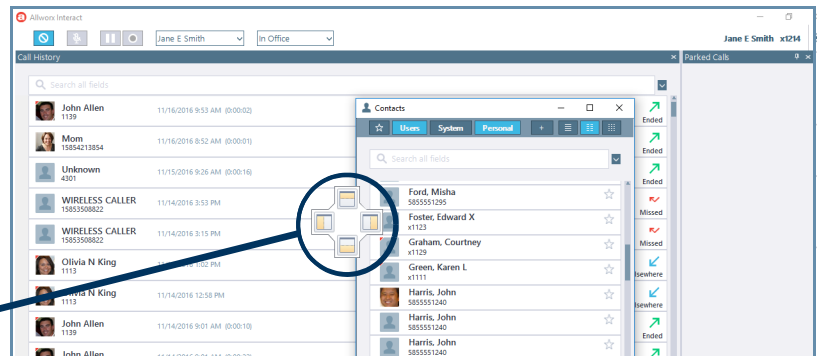
Returns the window back to the main application window.

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 or window header.

Sample window  
placement options



X

Makes the window invisible in the docked or undocked state. To make the window visible, navigate go to the Settings menu. See ["Settings" on page 24](#) 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 ["Settings" on page 24](#) 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)
- Options...
- Change password...
- Change PIN...
- Reset UI configuration\*
- Launch Allworx View...\*
- Find out more...
- About...
- Logout <username>...
- Exit










\* Available on Interact Professional only

## 3.2 Icons

The Interact Professional application uses icons to navigate the application, view the status of a call or User Contact, and manage calls. The presence status icons and availability status are applicable to User Contacts only.















### 3.2.1 Navigation Icons

Navigation icons direct the user to different windows or menus to access the features available within the Interact application.

	Active Calls Window		Agent: <name> Window		Current Calls Window
	Dialpad Window		Outside Lines Window		Parked Calls Window
	Queue Status Window		Options		New Interact software available.










### 3.2.2 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 call, no answer.
	Call Status - Incoming, missed call.		Call Status - Outgoing phone call.		

### 3.2.3 Action Icons

The action icons enable customizing the Interact Professional application or using the application instead of the Allworx phone. Click the icon to activate.

	Closes window within the application. Sets an undocked window to invisible. See <a href="#">"Settings" on page 24</a> to reactivate window.		Pinned window. Window is available for undocking.		Unpinned window. Window is available for Slide-to-Hide option.
	Do Not Disturb Inactive		Do Not Disturb Active		Mute Inactive
	Mute Active		Pause Call Recording.		Resume Recording.

	End Call Recording.		Begin Call Recording.		Call History and Contacts Window - Search
	Call History and Contacts Window - More Options		Contacts Window - Add Contact		Contacts Window - Single Column Display
	Contacts Window - Multiple Column Display		Contacts Window - Name/Favorite Status Display		Dialpad - Backspace
	Dialpad - Place a phone call. Click twice to redial the last number.				

## 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 the Allworx administrator to change the user password.

To use the Interact application after receiving a wipe command, log in using the current credentials and the new password provided by the Allworx administrator. See ["To log into the application:" on page 6](#) for more information.

## 3.4 Interact Sync

Interact Sync is a customizable plug-in for Interact Professional that enables click-to-dial capabilities between Interact Professional and installed versions of Lync 2013, Skype for Business 2015 or 2016, and Microsoft Outlook applications as well as Google Chrome and Mozilla Firefox web browsers. Additionally, Interact Sync supports synchronization between Allworx Presence and Lync or Skype for Business Availability, Microsoft Outlook meetings, and the Allworx phone.

For more information, see ["Interact Sync" on page 49](#).



## Chapter 4 Manage Calls

Use the Interact and Interact Professional applications to manage 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 when answering an incoming call, configure the Allworx handset.

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

### 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:

Locate a listing in the window, and then select by double-clicking the listing or right-clicking the listing and selecting **Dial** or **Intercom**.

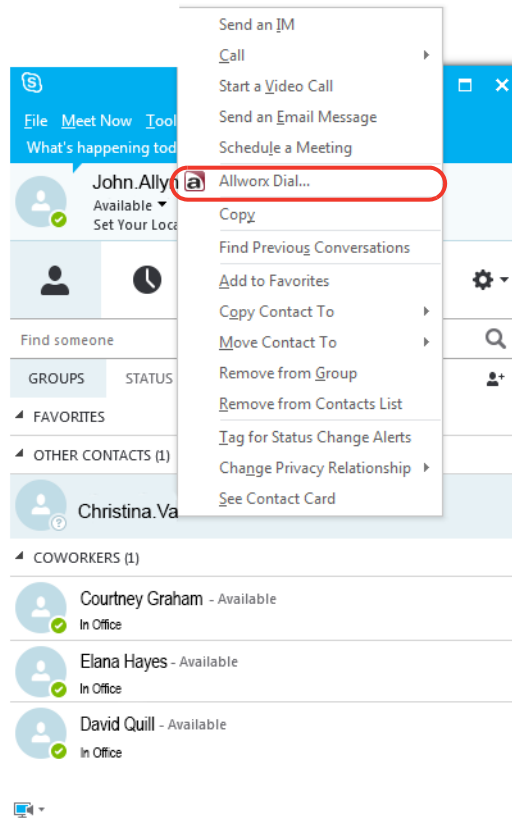
**To place a call using the Dialpad window:**

See ["Dialpad" on page 44](#) for more information.

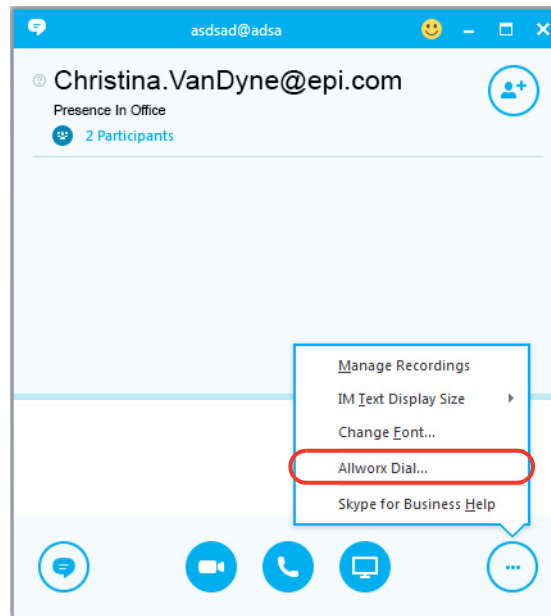
**To place a call using Lync or Skype for Business:**

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

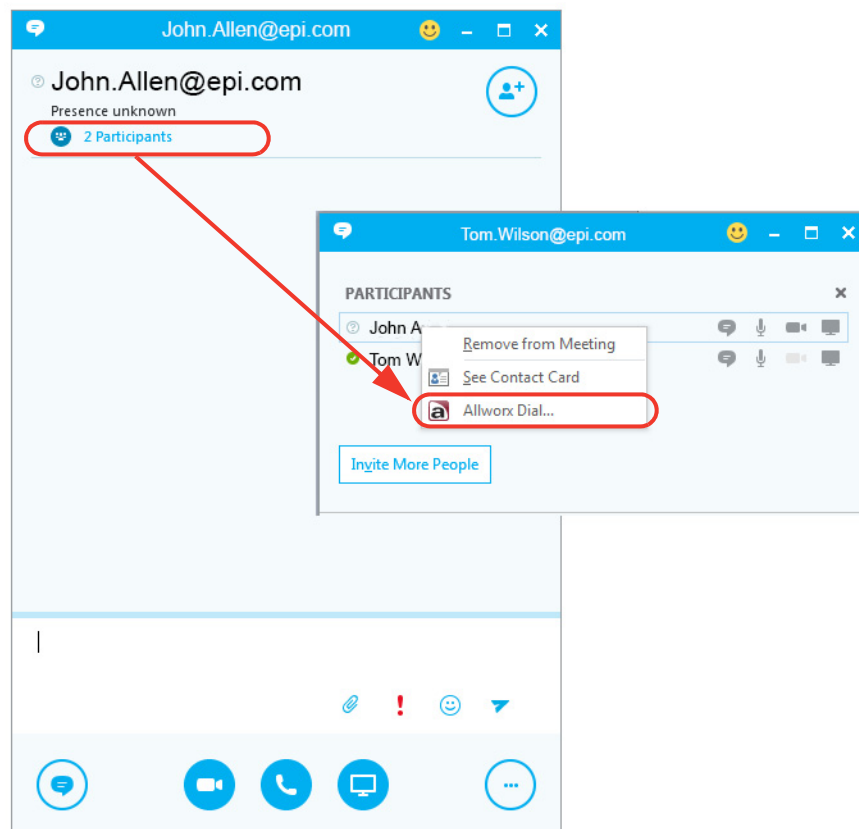
- Right-click a main contact listing to display the context menu (example uses Skype for Business) and select **Allworx Dial...**



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



### 5.1 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 (🔕).
	<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.

### 5.2 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 (🔇).
To deactivate Mute	Click the <b>Mute</b> button (🔊) a second time.

## 5.3 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.

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. To change the Call Recording File Location, Record All capability or Volume, see ["Recording" on page 26](#).

The Allworx administrator must enable the Call Recording feature, and then the Allworx phones support the following call recording instances:

	<b>Phone-hosted conference calls OR call recording</b>	<b>Call Recording a three-way conference call</b>	<b>Call Supervision</b>	<b>Call Recording a four-way conference call</b>
9202E phone		X	X	
9204 phone		X	X	
9212 phone	X			
9224 phone	X			
Verge series		X	X	X

## To record an active call:

Option	Description
Start 	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 	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 	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 	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>

## 5.4 Station Appearance

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

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

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

Default Line	Place an internal or external phone call.
<other available line appearance>	Place a call using specific line appearance .
Shared Call Appearance	Place a call using a specific shared call appearance line.
<Bluetooth enabled device>	Place a call using the <i>Bluetooth</i> appearance. Requires the Verge 9312 IP phone.
Intercom	Place an intercom call only to Allworx directory contacts.

- Place a call by using one of the following options:
  - open the application dialpad to dial the number.
  - double-click a listing in the Contacts window.
  - use the phone dialpad.
  - double-click a listing in the Call History window
- Begin talking using the designated Allworx handset, and then click **End Call** when finished.

## 5.5 Presence

The presence icon shows User Contact availability status. A presence other than In Office displays the presence status icon for the selected presence. See ["Icons" on page 12](#).

### 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.

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

## 5.6 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:

<b>Visible Windows*</b>	Changes 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.				
<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 an upgrade from the portal, if available. Click to begin the update.				
<b>Update Interact Sync*</b>	Displays only if an upgrade is available. Click to begin the update.				
<b>Options...</b>	<p>Click the tab to adjust:</p> <ul style="list-style-type: none"> <li>• Call Notification</li> <li>• Recording</li> <li>• External Program Link settings</li> <li>• Contacts</li> <li>• Interact Sync</li> </ul> <p>See <a href="#">"Update the Options" on page 25</a>, and then click:</p> <table border="1"> <tr> <td><b>Apply</b></td><td>To view the new settings without closing the Settings window.</td></tr> <tr> <td><b>OK</b></td><td>To save all changes or Cancel to ignore the changes. All changed settings persist across application starts (either restart or application upgrade)</td></tr> </table>	<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>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 or Allworx PIN" on page 7</a> for more information.				
<b>Change PIN...</b>	Enables the user to update the current Allworx PIN. See <a href="#">"Change the Allworx Password or Allworx PIN" on page 7</a> for more information.				
<b>Reset UI configuration</b>	Resets the application display settings to the factory defaults. Click <b>OK</b> to accept the request.				
<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 Options

The Options feature enables configuring the Interact or Interact Professional application. After opening the Options menu, select a configuration tab, and then adjust the setting as necessary.

**To open the Options menu:**

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

### 5.7.1 Call Notifications

Adjust 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>Lower Left</li> <li>Center</li> <li>Upper Right</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>Ringing Animation</b>	Behavior of the BLF appearance during an incoming call in the Contacts window. Options: include: <ul style="list-style-type: none"> <li>Flash (Default)</li> <li>Pulse</li> <li>None</li> </ul>

### 5.7.2 Contacts

Set the My Allworx directory image, manage the personal contacts from external sources, and import/export personal contacts.

#### My Allworx directory image

Select an image to store on the Allworx server and associate with your Allworx User Contact entry. This is the image that other Allworx users see associated with your caller ID name/number in the directory listing.

<b>Add an Image / Change the image</b>	Opens a file explorer dialog box. Navigate to the directory that contains the image, and then click <b>Open</b> to add the image.
<b>Clear the image</b>	Removes the image file and returns the avatar to the contact silhouette.

#### Outlook Integration

Contact integration with Outlook is <enabled/disabled>.	Indicates the current selected option. Select the <b>Enable</b> or <b>Disable</b> button to change. <ul style="list-style-type: none"> <li>If enabled, the Interact application communicates with the Outlook application to monitor Personal Contacts for availability in the Interact Professional application.</li> <li>If disabled, the Interact application removes Outlook Personal Contacts from the Contacts list. Additionally, the Interact Professional application does not share the Personal Contacts with other Allworx devices and applications.</li> </ul>
---	---

## Contact Accounts

The Interact application can display Personal Contacts on all assigned Allworx applications and devices.

<b>Accounts on this device</b>	<p>Displays local the contact locations.</p> <ul style="list-style-type: none"> <li>If the account settings have not been set, click <b>Choose</b>.</li> <li>If the account settings are set, click <b>Edit</b> to open the Edit account details dialog box. Select one of the available options to change the contact management or click <b>Forget account</b> to remove the contacts.</li> </ul>
<b>Accounts on other devices</b>	<p>Displays contact locations synchronized from other Allworx devices..</p> <ul style="list-style-type: none"> <li>If the account settings have not been set, click <b>Choose</b>.</li> <li>If the account settings are set, click <b>Edit</b> to open the _Edit account details_ dialog box. Select one of the available options to change the contact management or click <b>Forget account</b> to remove the contacts.</li> </ul>

## Import / export personal contacts

Users can import contacts from a CSV or vCard file into the Personal Contacts, which is stored on the Allworx server. Users can also export the personal contacts to a file for backup purposes or to import into another application.

Import from file	<p>Prior to performing this operation, create, save, and close a .CSV file with the following fields:</p> <table> <tr> <th>Required</th><th>Optional</th></tr> <tr> <td> <ul style="list-style-type: none"> <li>Description OR Last Name</li> <li>One phone number</li> </ul> </td><td> <ul style="list-style-type: none"> <li>First name</li> <li>Middle name</li> <li>DID Prompt Language</li> <li>Login</li> <li>DID DNIS Name</li> </ul> </td></tr> </table> <ol style="list-style-type: none"> <li>Selecting this option opens a file explorer dialog box. Navigate to the file location, and then click <b>Open</b>.</li> <li>Use the drop-down lists to select how to map the columns in the CSV file to the contact fields. If the .CSV file contains column headings, verify the <b>First row contains column headers</b> is checked.</li> <li>Click <b>OK</b>. A confirmation dialog box displays. Click <b>OK</b> to close it, and then click <b>OK</b> to close to the Option Settings dialog box.</li> </ol>	Required	Optional	<ul style="list-style-type: none"> <li>Description OR Last Name</li> <li>One phone number</li> </ul>	<ul style="list-style-type: none"> <li>First name</li> <li>Middle name</li> <li>DID Prompt Language</li> <li>Login</li> <li>DID DNIS Name</li> </ul>
Required	Optional				
<ul style="list-style-type: none"> <li>Description OR Last Name</li> <li>One phone number</li> </ul>	<ul style="list-style-type: none"> <li>First name</li> <li>Middle name</li> <li>DID Prompt Language</li> <li>Login</li> <li>DID DNIS Name</li> </ul>				
Export to CSV file or Export to vCard file	<p>Opens a fire explorer dialog box. Navigate to the folder to store the file, and then enter a File name in the field. Click <b>Save</b>. The Successful export operation dialog box opens and indicates the number of exported contacts. Click <b>OK</b>.</p>				

<b>Refresh contacts</b>	Click to update the Contacts window.
-------------------------	--------------------------------------

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

## 5.7.3 Recording

Specify the recording storage folder, manage the Record All feature, and volume level.

<b>Folder to store recordings in</b>	<p>The folder to store the recordings displays.</p> <p>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.</p>
--------------------------------------	---



<b>Record All</b>	<p>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="#">“Begin talking using the designated Allworx handset, and then click End Call when finished.” on page 23</a> for more information.</p> <p><b>Enabled</b> - User can turn on the Record All Calls feature locally. The default is Off.</p> <p><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.</p>
<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.

## 5.8 Interact Sync settings

Configure 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)	<p>After selecting the contact, Interact Professional automatically dials the phone number. Select which number to automatically dial:</p> <ul style="list-style-type: none"> <li>• Work Phone</li> <li>• Mobile Phone</li> <li>• Home Phone</li> <li>• Other</li> </ul>

### Presence Synchronization Options

Configure the ways the Skype for Business or Lync Availability along with Outlook appointments can affect the Allworx Presence and phone Do Not Disturb setting.

#### Availability and phone calls

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	<p>Select from the following options:</p> <ul style="list-style-type: none"> <li>• Available</li> <li>• In a call</li> <li>• In a conference call</li> <li>• Be right back</li> <li>• Busy</li> <li>• In a meeting</li> <li>• Do Not Disturb</li> <li>• Away</li> </ul>
--	---

#### Availability and 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:	<p>Select from the following options:</p> <ul style="list-style-type: none"> <li>• Copy my Availability to my Allworx Presence</li> <li>• Copy my Allworx Presence to my Availability</li> </ul>
When I am in a call in my Skype for Business or Lync application and my Availability changes to <b>In a call</b> :	<p>Select from the following options:</p> <ul style="list-style-type: none"> <li>• Do not change my Allworx Presence</li> <li>• Change my Allworx Presence to: <ul style="list-style-type: none"> <li>• Away</li> <li>• At A Meeting</li> <li>• Busy</li> </ul> </li> </ul>

When my PC is idle for a prolonged period of time (typically 10 minutes) and my Availability changes to <b>Away</b> :	Select from the following options: <ul style="list-style-type: none"> <li>• Do not change my Allworx Presence</li> <li>• Change my Allworx Presence to:             <ul style="list-style-type: none"> <li>• Away</li> <li>• Busy</li> </ul> </li> </ul>
---	--

When I lock my PC and my Availability changes to <b>Away</b> :	Select from the following options: <ul style="list-style-type: none"> <li>• Do not change my Allworx Presence</li> <li>• Change my Allworx Presence to:             <ul style="list-style-type: none"> <li>• Away</li> <li>• At Home</li> <li>• Busy</li> <li>• At A Meeting</li> </ul> </li> </ul>
--	---

### Availability and phone DND setting

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: <ul style="list-style-type: none"> <li>• Copy my Availability to my phone DND setting</li> <li>• Copy the DND setting from my phone to my Availability</li> </ul>
When I lock my PC and my Availability changes to <b>Away</b> :	Select from the following options: <ul style="list-style-type: none"> <li>• Do not change the DND setting on my phone</li> <li>• Enable DND on my phone</li> </ul>

### Appointments and Allworx Presence

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

Default Presence for calendar appointments	Select from the following options: <ul style="list-style-type: none"> <li>• Unmodified</li> <li>• "Show As" based (Outlook feature)</li> <li>• In Office</li> <li>• On Vacation</li> <li>• At Home</li> <li>• On Business Trip</li> <li>• At A Meeting</li> <li>• Away</li> <li>• Busy</li> </ul>
Do not modify my Presence for appointments with a "Show As" value of:	<ul style="list-style-type: none"> <li>• Free</li> <li>• Tentative</li> </ul>

Default Presence for calendar appointments	Select from the following options: <ul style="list-style-type: none"> <li>• Unmodified</li> <li>• "Show As" based (Outlook feature)</li> <li>• In Office</li> <li>• On Vacation</li> <li>• At Home</li> <li>• On Business Trip</li> <li>• At A Meeting</li> <li>• Away</li> <li>• Busy</li> </ul>
--	---

<b>Override options</b>	Temporarily disable synchronization between the Microsoft applications and Allworx Presence.  Locate <b>Ignore Availability changes when I manually set my Presence to:</b> , and then select the applicable option: <ul style="list-style-type: none"> <li>• On Vacation</li> <li>• On Business Trip</li> <li>• At Home</li> </ul>
-------------------------	---

<b>Presence change log</b>	Display a running log of recent changes to the Allworx Presence and DND for debugging purposes.
----------------------------	---

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.

## 5.8.1 External Program Link

Tie 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>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 30</a> for more information.</li> <li>command line - See <a href="#">"To use External Program Link - CMD Shell option:" on page 30</a> for more information.</li> </ul> </li> <li>Enter the URL or command line executable.</li> </ol>
<b>Macros</b>	<p>Shortcuts to include in the command line executable. Options:</p> <p>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 values when 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> <p><b>Version 7.7 or lower</b></p> <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> <p><b>Version 8.0</b></p> <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> <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 include:</p> <ul style="list-style-type: none"> <li>Perform on inbound calls</li> <li>Only execute if a call is answered</li> <li>Do not execute for internal calls</li> <li>Perform on outbound calls</li> <li>Only execute if a caller is not in the contact list</li> </ul>
<b>Select appearances (Advanced)</b>	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.

<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>	Displays a sample contact and URL based on the information provided in the Command to Execute section.
<b>Test this action now</b>	Click to verify the command is valid.
<b>Action history</b>	Click the arrow to display the list of recently performed commands.

### 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. **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 nine available windows to independently manage and customize.

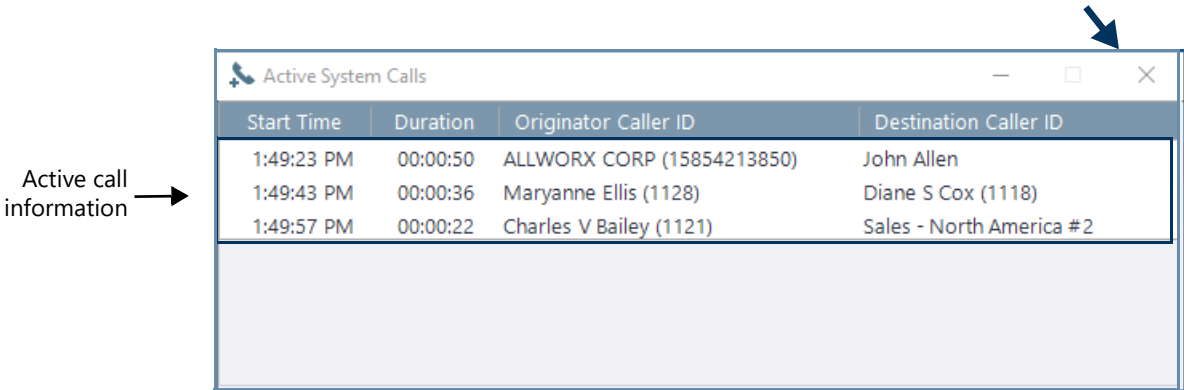
## 6.1      Active System Call

The Active System call window displays internal and external calls and the following call information:

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.

Hide Window Active Icon

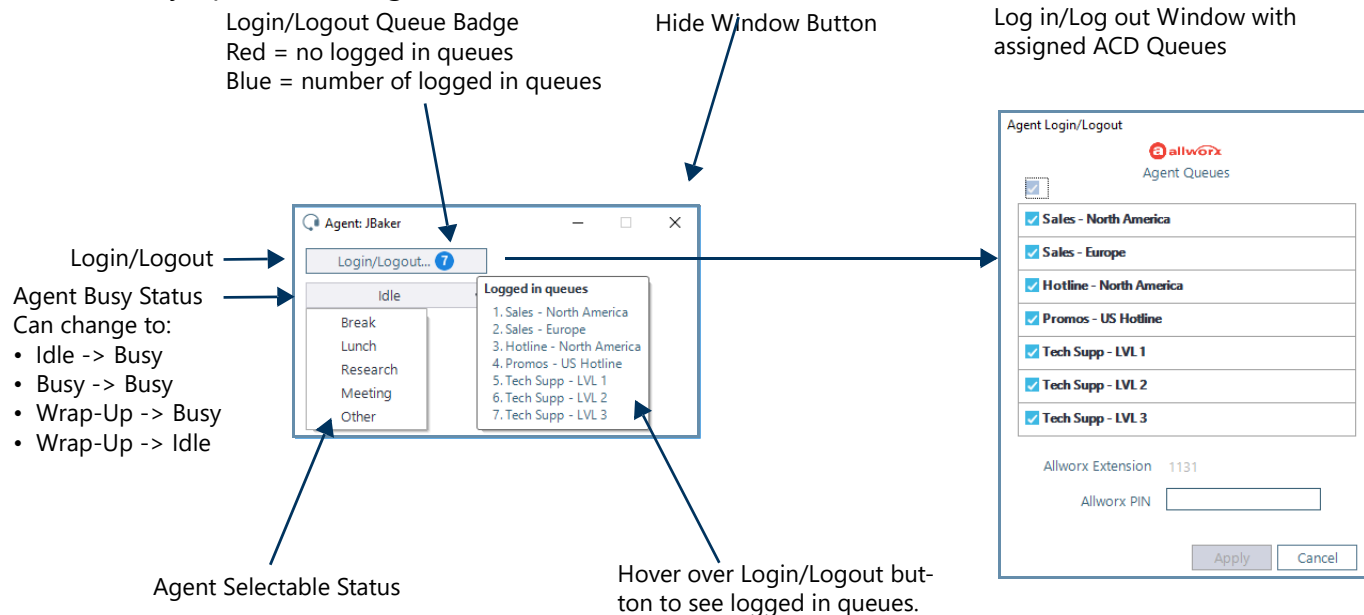


To change the Active System Call window view, contact the Allworx administrator to update the user system-wide active calls display to:

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 and have an ACD Appearance PFK assigned to the handset. 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 or uncheck the box to select the call queue(s) to log in to or log out, respectfully.
3. Click in the **Allworx PIN** field and enter the assigned Allworx PIN.
4. Click **Apply**. After logging into one or more call queues, the Login/Logout... button displays a blue badge. The badge indicates how many call queues the agent logged in to. A red badge with the number 0 displays if the agent logs out of all call queues. 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, an agent can set the agent status to Busy or Idle.

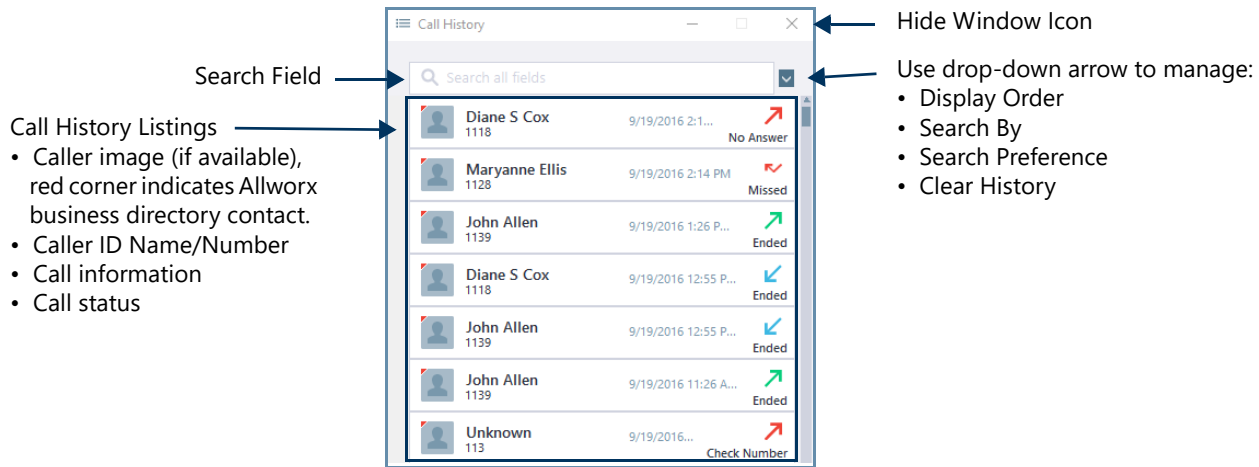
<b>Note:</b>	The Interact Professional agent cannot change the following Busy States: <ul style="list-style-type: none"> <li>• Ringing</li> <li>• Call On Hold</li> <li>• Administration functions (i.e. handset is in use)</li> <li>• On Call</li> </ul>
--------------	--

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 current call history size (Verge IP phones support 200 entries / 92xx IP phones support 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.

- (optional) Click the drop-down arrow next to the Search field and 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.

- 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 Search field.
2. Select **Display Order** in the drop-down list, and then the preference. The 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.

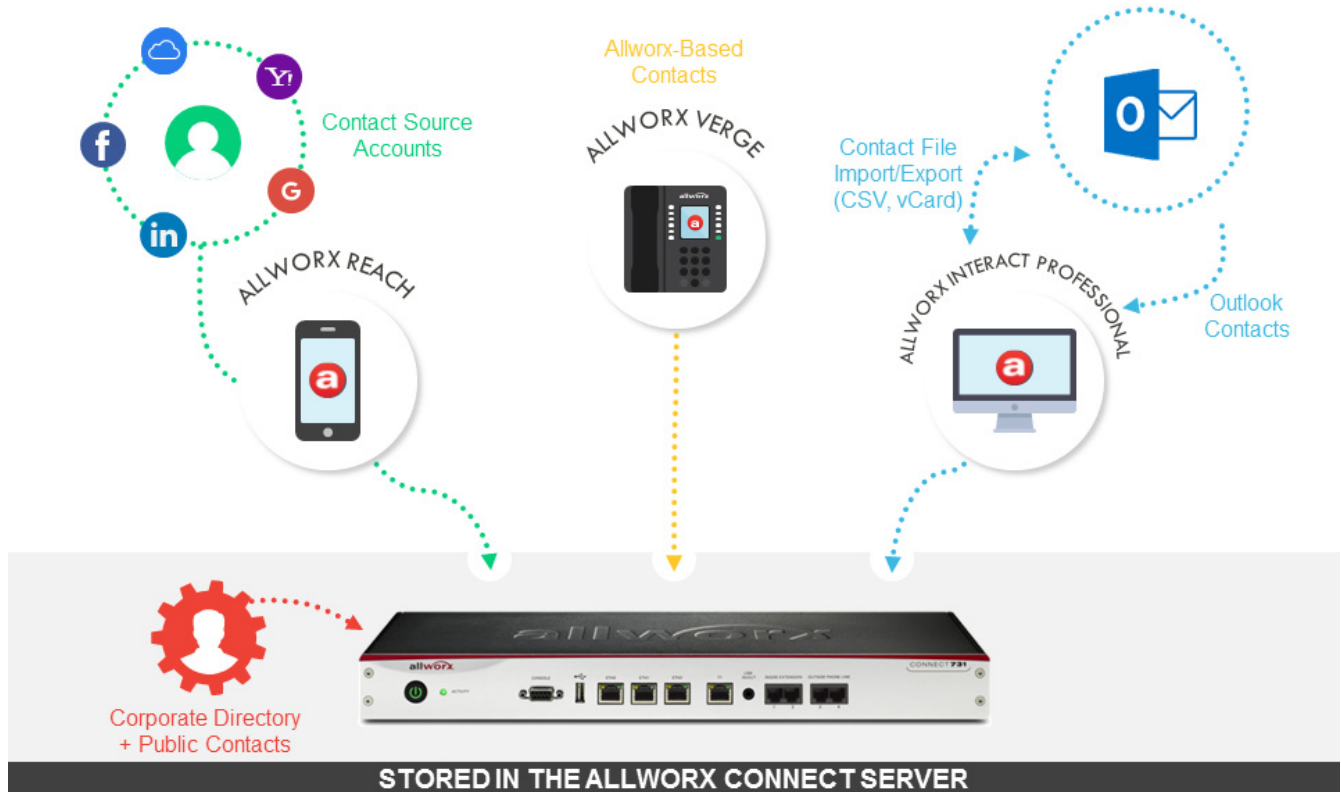


## 6.4 Contacts

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

- User and System contacts – contacts with an internal Allworx extension assigned. Managed by the Allworx Server Administrator.
- Public Contacts – system-wide contacts managed by the Allworx Server Administrator.
- Personal Contacts – contacts managed by the Allworx user that are either:
  - synchronized from a Reach device originating application (device app such as Contacts or People)
  - synchronized from an account such as Gmail email account or an Outlook email account.
  - 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.

The Allworx system shares the User, System, and Public Contact types with all of the Allworx user's connected Allworx phones, Reach devices, and the Interact application. Within the Reach and Interact Professional applications, Allworx users control sharing and synchronizing the Personal Contacts to the devices assigned to the Allworx user. See ["Contact Accounts" on page 26](#) for more information about managing and sharing Personal Contacts.



Allworx users can manage and update Personal Contacts by using the originating device or application. The Verge IP phone Personal Contact Details screen identifies the originating application in the Account line. Only the Allworx user can add, edit, or delete each Personal Contact. Allworx Server Administrators can delete all of a user's personal contacts from the Connect server permanently. Allworx Server Administrators cannot limit the individual user's number of Personal Contacts stored on a Connect server.

### Example:

Jane Smith needs to update her Personal Contact, Tom Wright. Since Jane uses the Verge IP phone, Reach for iOS, and the Interact application, she needs to determine how she added Tom to her Personal Contacts. Jane opens the Contact Details for Tom Wright and scrolls to look at the Account line and learn how she added Tom to her Personal Contacts. If the Account line reads:

- **Allworx Personal:** Jane added Tom Wright using her Verge IP phone. To update the contact information about Tom, Jane must use her Verge IP phone.

Additional <Allworx> types displayed, but Allworx users cannot edit except for Favorite status includes:

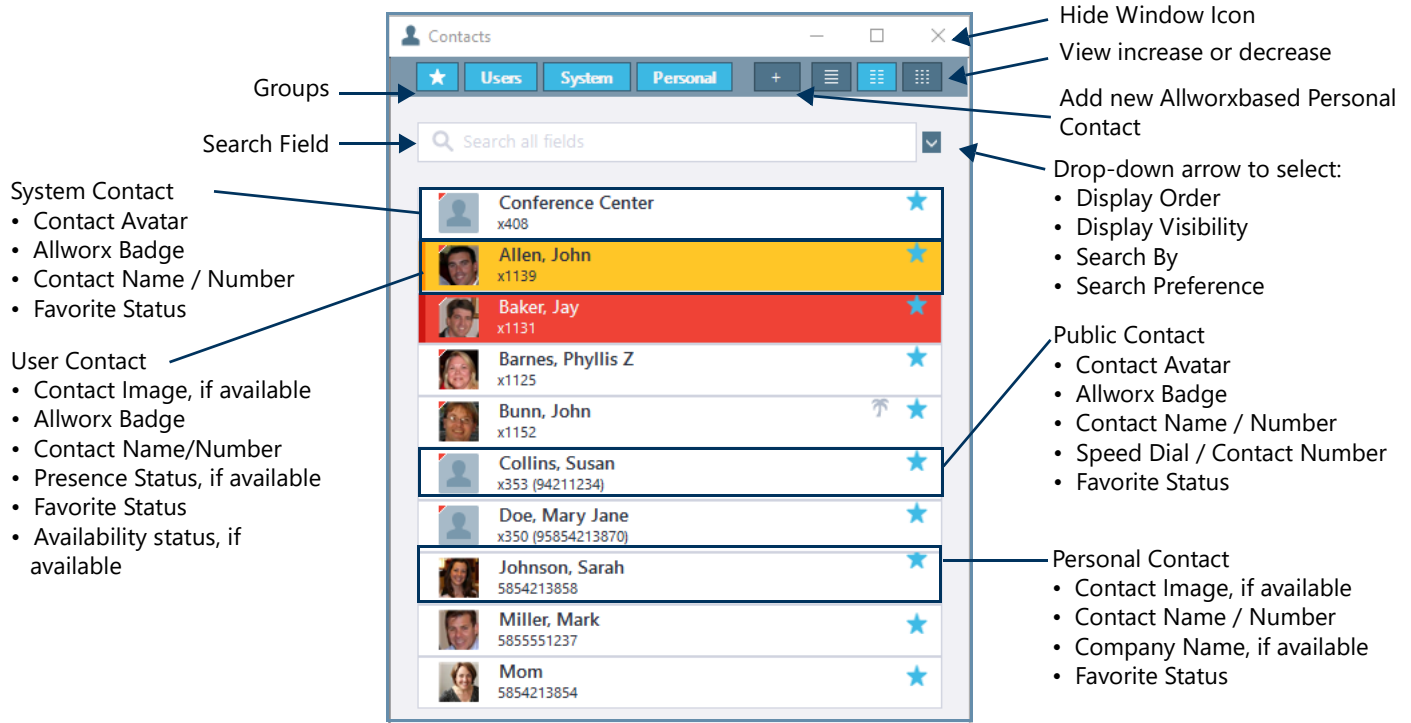
- |                |                  |                     |
|----------------|------------------|---------------------|
| • SystemUsers  | • PublicContact  | • Voicemail         |
| • SystemExts   | • SpeedDials     | • DoorRelays        |
| • EmailAliases | • AutoAttendants | • ConferenceCenters |

- **<email address>:** Jane used her email account (such as Gmail or Outlook) to synchronize her contacts with her Verge IP phone. To update the contact information about Tom, Jane must do so in her email application.
- **<Reach device>:** Jane used an iOS app (such as Contacts) to manage her contacts to her Verge IP phone. To update the contact information about Tom, Jane must do so in the iOS app.

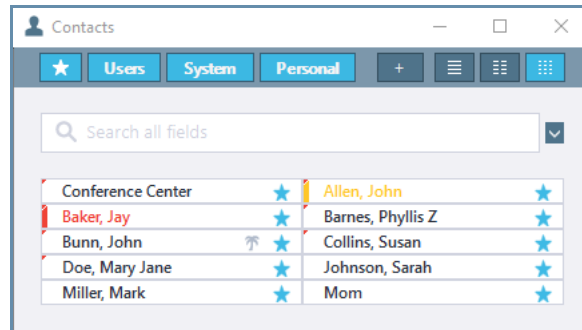
Use this window to view or group the contacts, designate favorite contacts, add a new Personal Contact, and adjust the view. Interact Professional users can place calls, search the contacts using

specific criteria, and change the display order.

## Standard View with High Visibility Display



## Ultra Condensed with Low Visibility Display



Each contact listing displays a contact photo (if available), caller ID name and number, and the favorite status. Personal Contacts display the company name (if available). User Contacts display icons to indicate a presence status for other than In Office (see ["Icons" on page 12](#) for further information) and an availability status using color-coded BLF status information.

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

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

User, System, or Public Contact	Personal 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> <li>• Account - the source account used to create the contact</li> </ul>

### To change the Display Visibility within the Contacts window:

1. Click the drop-down arrow next to the Search field and select the **Display Visibility** option.
2. Select the **High Visibility** (highlights the entire User Contact Listing) or **Low Visibility** (changes the User Contact Listing text color) option.

### To use the Contact groups:

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

Favorites	Display only Favorite contacts from business and Microsoft Outlook directories.
User	Display the Allworx contacts assigned an Allworx handset.
System	Display the Allworx Call Monitor, Call Queue, Auto Attendant, and System Paging Zones.
Personal	Display the contacts synchronized from a Reach device, the Verge IP phone, or Microsoft Outlook.

### 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 or right-click the contact listing and select **Favorite** from the drop-down list.

### To add a new Allworxbased Personal Contact:

Interact Professional users can add new Personal Contacts from the Contacts window. Click the new Contact (+) button to open the **Edit contact details** dialog box. Enter the information in the fields provided, and then click the **OK** button. The new Personal Contact displays in the Contact window.

### 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 displaying two lines of information, which also includes the contact number. A Microsoft Outlook contact has three lines of information, which 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.

**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 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 select one of the available phone numbers.
3. Click **Done** to save the changes.

**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	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

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

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

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

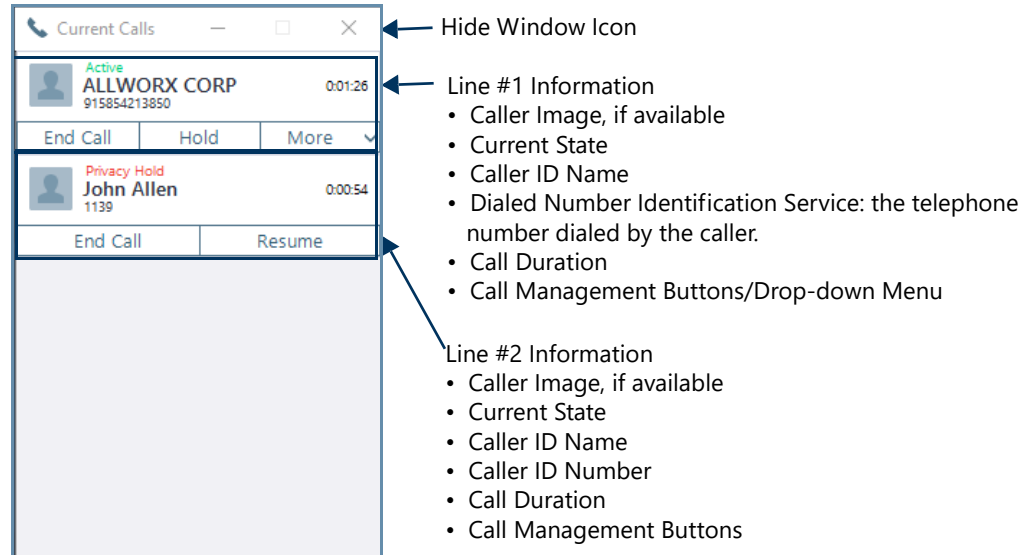
3. (optional) Click the drop-down arrow next to the Search field and select the **Search By** option.

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.

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

## 6.5 Current Calls

The Current Calls window displays all active and on hold calls for the handset connected to the Interact Professional application. Additionally, Interact Professional users can place a call on hold, transfer a call, create a conference call, or end the active call from this window. 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.



### Note:

To avoid disconnecting a call, configure the Allworx handset.

- 92xx IP phone - **CONFIG > Preferences > Auto On Hold**. Select **Enabled** and exit the menu.
- Verge IP phone series - **Settings > Phone Preferences > Call Handling > Auto On Hold**. Select **Enabled**. Press **Back** to return to the Settings screen and **Back** to return to the Idle screen.

### To place a call on hold:

See ["Place a Call On Hold" on page 19](#) for more information.

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

- Locate the Current Calls window, and then the current phone call.
- 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.

Option	Description
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>
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.

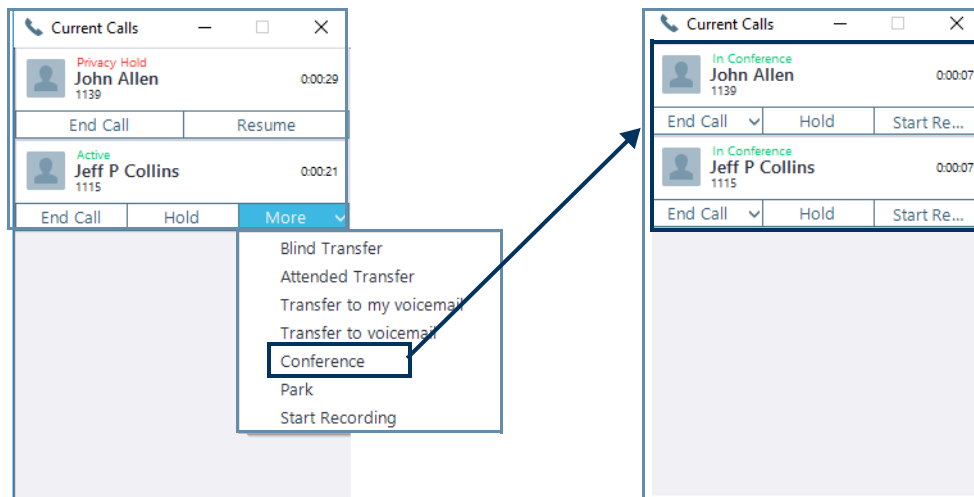


### To create a conference call:

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:

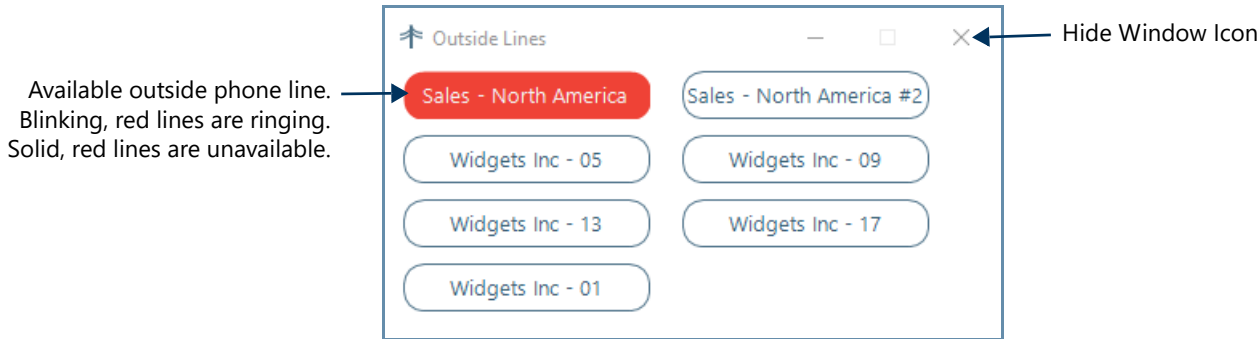
1. Open the Allworx Interact Professional Dialpad window
2. Dial the number using one of the following options:
  - Dial the internal extension.
  - Follow the dial plan for an external number. To dial an external number, dial the outside line access digit set in the dial plan (usually 9 or 78 + Allworx 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. The dialpad is available to dial additional digits while on a call (example: Auto Attendant options or PIN entry for the Message Center) without needing to press the **Call** active icon.

**Shortcut:** Double-click the **Call** 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, seize 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
<div>1. Click on an available phone line.</div> <div>2. Locate the Dialpad window. Enter the number and click <b>Call</b>.</div>	<div>1. Locate the Contacts or Call History window, and then locate the external contact.</div> <div>2. Drag and drop the contact to an available line in the Outside Lines window.</div>

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

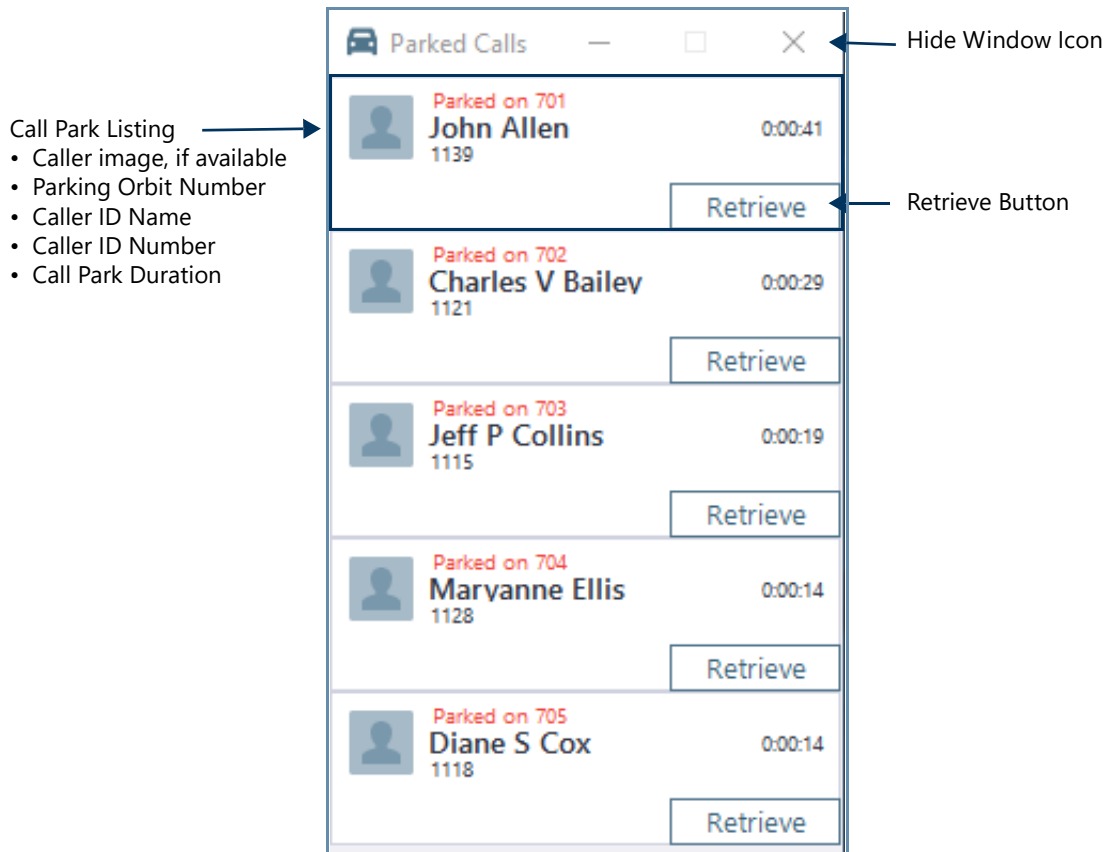
**To answer a call:**

- 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 a status listing of each parked call. Each 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:

Do one of the following:

- Drag and drop the call listing in the Current Calls window to the Parked Calls window.
- Locate the Current Calls Window, and then the current phone call. Click the **More** drop-down arrow, and select **Park** from the drop-down list.

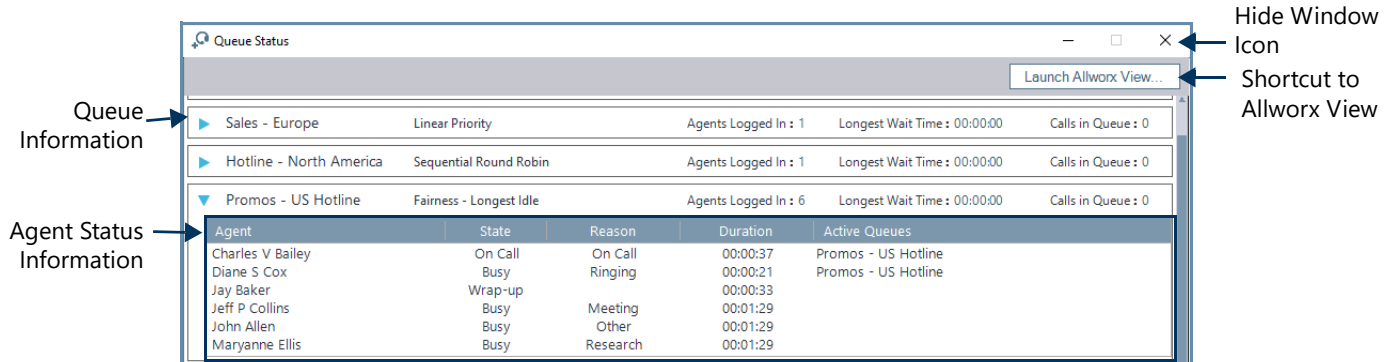
### To return to the call:

Do one of the following:

- Click the call park listing **Retrieve** button.
- Double-click the call park 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>• Sequential Round Robin</li> <li>• Linear Priority</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 Interact Sync

Interact Sync is a customizable plug-in that enables click-to-dial capabilities between Interact Professional and installed versions of Lync 2013, Skype for Business 2015 or 2016, and Microsoft Outlook 2010, 2013, and 2016 applications as well as Google Chrome and Mozilla Firefox web browsers. Additionally, Interact Sync supports synchronization between Allworx Presence and Lync or Skype for Business Availability, Microsoft Outlook meetings, and the Allworx phone. When manually changing a presence or Availability status in one application, the other application synchronizes the status. To customize the Interact Sync feature, see ["Update the Options" on page 25](#).

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

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

### 7.1 Set Interact Sync as the Default Dialing Application

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

#### Windows 7/8

- If there is already a default TEL protocol handler, Interact Sync does not register as the default TEL protocol during installation. To register the Interact Sync plug-in as the Windows default dialing application on the PC:
  - Click **Start > Control Panel > Default Programs**.
  - Click **Set your default programs**.
  - Locate and click **Allworx Interact Sync > Choose defaults for this program**.
  - Check the box next to **TEL**, and then click **Save**. The Windows operating system saves the changes.
- If there is not a default TEL protocol handler, the operating system registers the Interact Sync application as the default TEL protocol handler during installation.

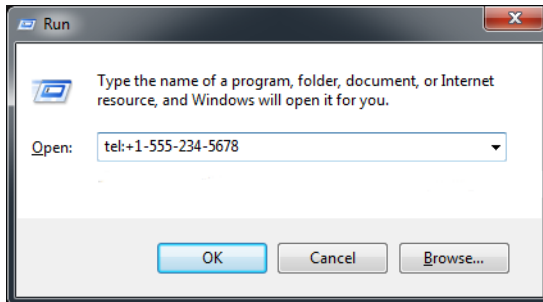
#### Windows 10

After installing the Interact Sync application, the Windows 10 operating system displays a pop-up message asking the user to select the TEL protocol handler to use when performing a TEL function.

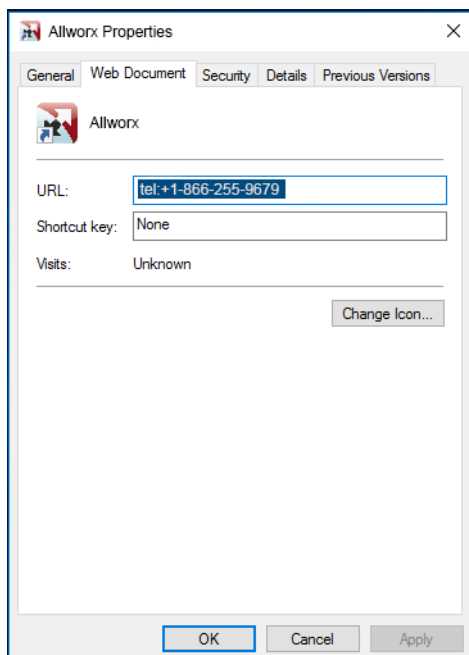
**To use the TEL protocol:**

Perform one of the following:

- Executing a TEL protocol from the Windows Run dialog box.
  - Click the PC **Start** icon.
  - Locate the search field, type RUN in the field, and hit enter. The RUN window opens.
  - Type **tel: <phone number>** in the field, and then click **OK**. The Allworx phone connected to the Interact Professional application automatically dials the number.



- Double-click a Windows shortcut that points to a TEL protocol.
  - Locate the Windows shortcut and double-click.
  - Locate the **<type> Document** tab. Verify the number is correct and click **OK**. The Allworx phone connected to the Interact Professional application automatically dials the number.



- Supports the TEL protocol if the web page supports TEL protocol.



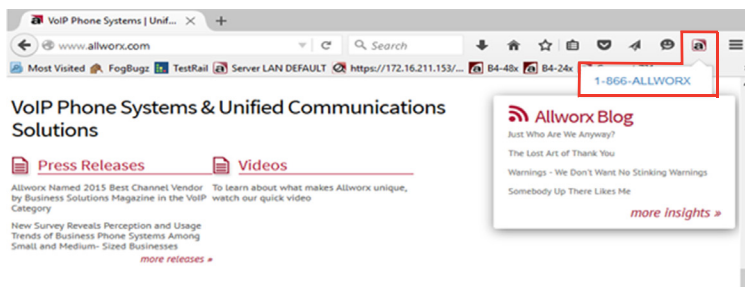
## 7.2 Click-to-dial with Google Chrome or Mozilla Firefox Web Browser

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

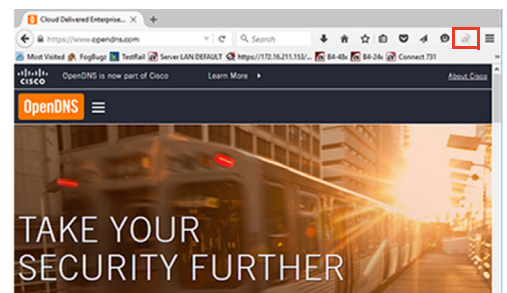
### To select the number to dial:

Select one of the following options:

- Click the enabled Allworx logo, and then select a detected number in the drop-down list. If Interact Sync does not detect any phone numbers, the Allworx logo is disabled. Examples below are from Mozilla Firefox web browser (Google Chrome browser displays the Allworx logo in the URL Address bar).

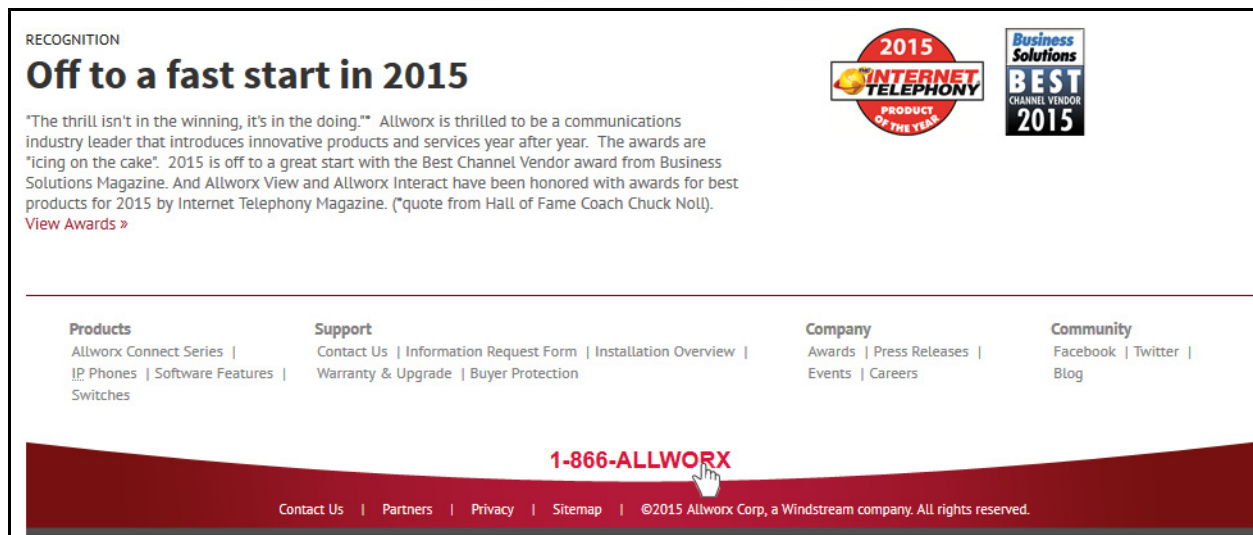


Phone number detected

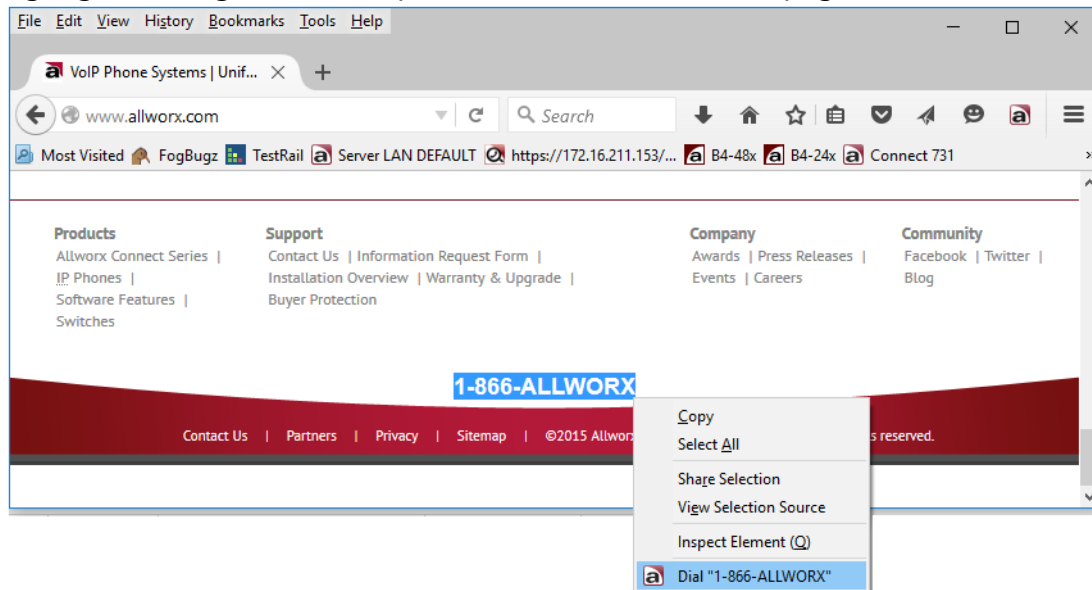


No phone number detected

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



- Highlight and right-click the phone number on the web page.



#### To disable Interact Sync within the Mozilla Firefox web browser:

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

#### To disable Interact Sync within the Google Chrome web browser:

Click the **Open menu > Settings > Extensions > Allworx Interact Sync for Chrome > uncheck the Enable** box.

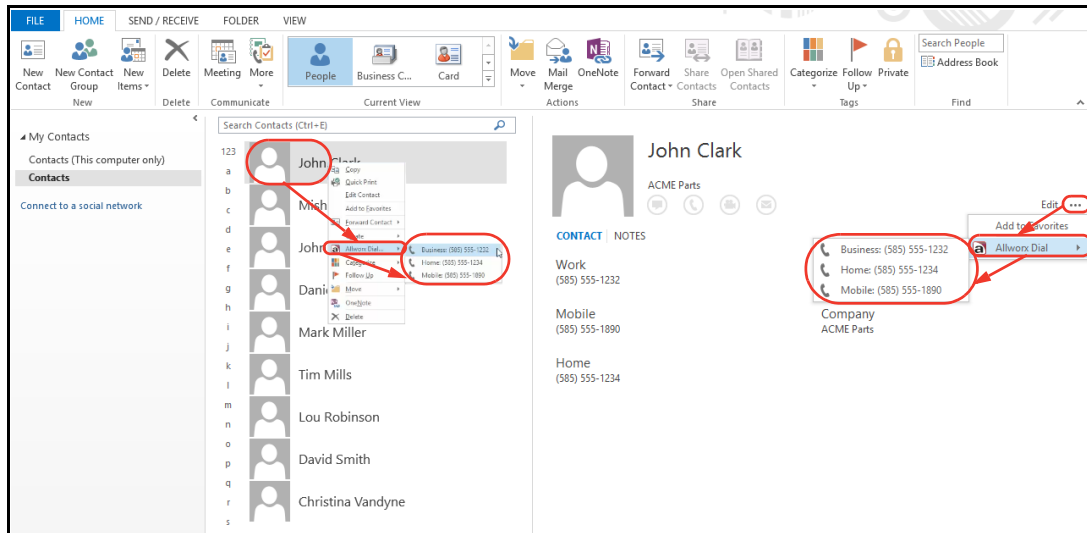
## 7.3 Click-to-dial with Microsoft Outlook

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

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

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

- People tab > Contacts List (2 options)



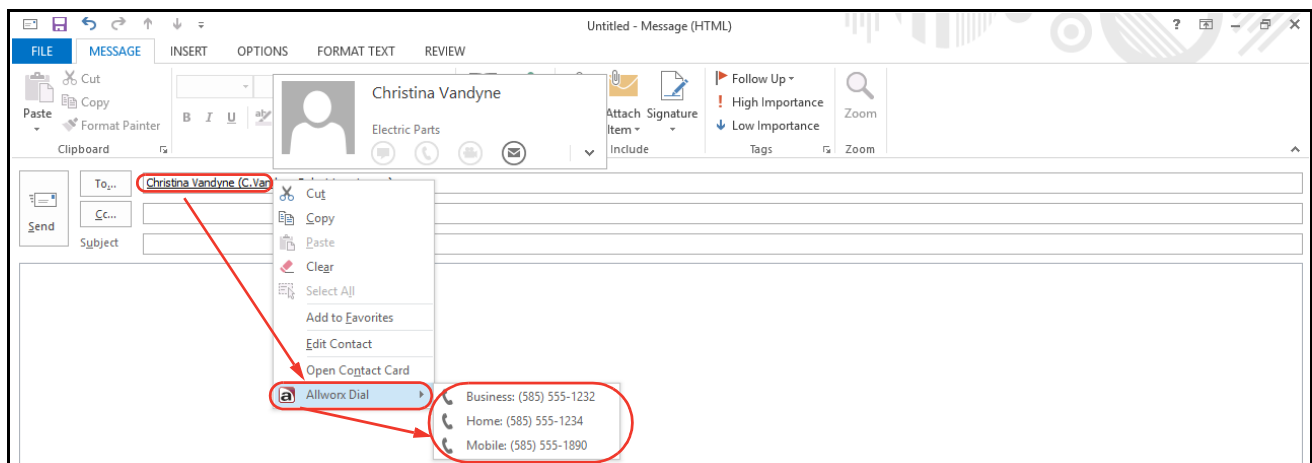
#### Option 1

1. Right click the contact.
2. Click **Allworx dial...**
3. Click the contact phone number to dial.

#### Option 2

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

- Email > To... field



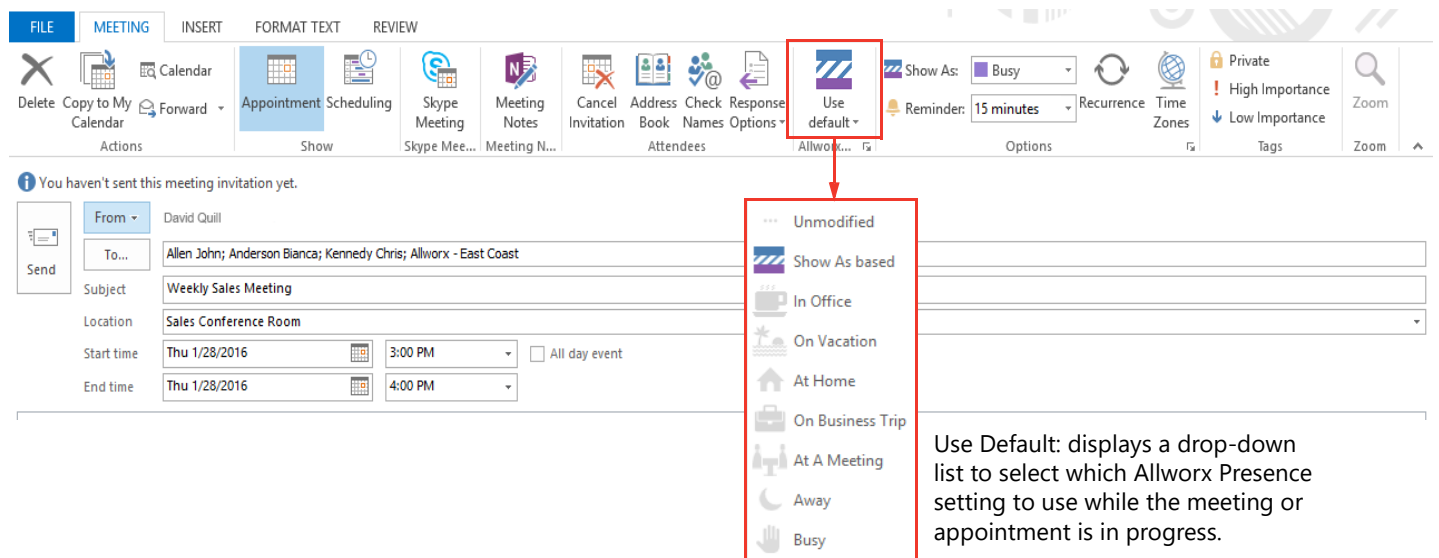
1. Right click the email addressee.
2. Click **Allworx dial...**
3. Click the contact phone number to dial.

## 7.4 Presence Synchronization with Microsoft Outlook

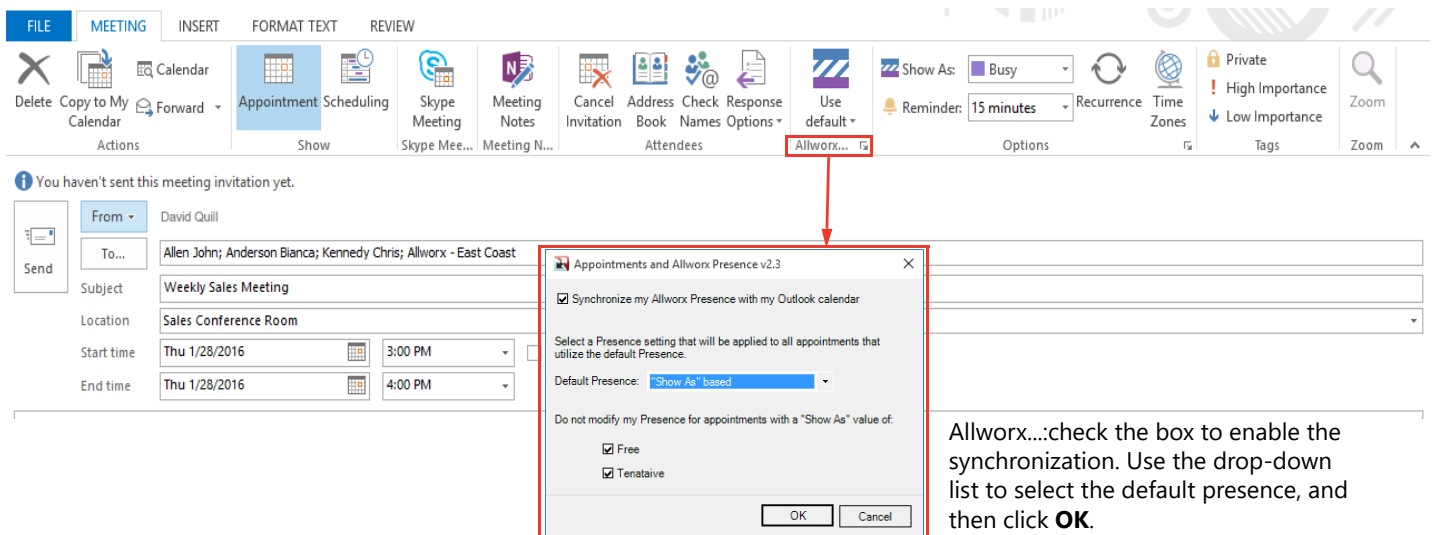
Easily synchronize Allworx Presence with Outlook calendar appointments.

When creating or modifying an Outlook appointment, the Set Default Presence setting in the Outlook tool bar enables selecting an Allworx Presence setting for an appointment. The Allworx Presence status

automatically updates through Interact Professional for the duration of the appointment, and then restores to the original value once the appointment is finished. The Allworx Presence changes to the pre-appointment state after exiting the Interact Professional application.



Use Default: displays a drop-down list to select which Allworx Presence setting to use while the meeting or appointment is in progress.



Allworx...:check the box to enable the synchronization. Use the drop-down list to select the default presence, and then click **OK**.

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

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

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

# Chapter 8 Troubleshooting

Condition	Description	Solution
<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 MCPRE.exe tool. 1. Navigate to <b>Start &gt; Control Panel &gt; Programs and Features</b> . 2. Locate the McAfee software, and click the <b>Uninstall</b> button at the top of the list. 3. Download the MCPRE.exe tool from <a href="http://download.mcafee.com/products/licensed/cust_support_patches/MCPRE.exe">http://download.mcafee.com/products/licensed/cust_support_patches/MCPRE.exe</a> . 4. Run the tool. 5. Download Microsoft Fixit 50842.msi from <a href="http://go.microsoft.com/?linkid=9804433">http://go.microsoft.com/?linkid=9804433</a> . 6. Run the tool. 7. Reboot the computer. 8. Install the Allworx Interact Professional software. 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="#">"Begin talking using the designated Allworx handset, and then click End Call when finished," on page 23</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.
Selected Interact contact does not dial correctly.	Interact Professional user selected an Interact contact to dial with a local number that requires dialing an area code.	<p>The Allworx Administrator must add the local area code into the Allworx server dial plan, but the Allworx server strips the "9 + 1" from the entered phone number.</p> <p>The Allworx Administrator must configure the Allworx server so that the send digits as dialed on the outside line is disabled.</p>
<b>Windows</b>		
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.	<p>The Visible Windows setting was changed.</p> <p>The user may not have server permissions to display certain windows.</p>	<p>Navigate to <b>Settings &gt; Visible Windows</b> and select the windows to display.</p> <p>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.</p>
Cannot find the personal contacts in the Contact window.	Outlook Interact contacts do not display in the Interact Professional Contact window.	<p>The Interact Professional application requires the Outlook 2010 application to be open prior to launching the application.</p> <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> <p>The Outlook contacts are now available within the Interact Professional application.</p>
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.
<b>Interact Sync</b>		
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 or 2016 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.	<p>Do the following:</p> <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; Interact 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>



Condition	Description	Solution
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>
The Allworx Presence is not changing with the Outlook appointments.	The Outlook calendar is not syncing the Allworx Presence.	Check the following settings available at Interact Professional > Interact Sync and verify: <ul style="list-style-type: none"> <li>The <b>Presence Synchronizations</b> options check box is enabled (checked).</li> <li>The <b>Override options</b> are not enabled (unchecked) - e.g., On Vacation, On Business Trip, or At Home.</li> <li>The <b>Appointments and Allworx Presence</b> &gt; <b>Default Presence for calendar appointments</b>: is set to the "Show As" based option.</li> <li>The <b>Appointments and Allworx Presence</b> &gt; Do not modify my presence for appointments with a "Show as" value of: overrides are not enabled (unchecked) - Free or Tentative.</li> </ul>
The Outlook welcome screen displays.	User does not have an Outlook profile and does not expect to see this screen.	Interact Professional automatically retrieves contacts from Microsoft Outlook, regardless if there has never been an Outlook profile created.
<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>Open the Task Manager and click the Processes tab.</li> <li>Locate InteractStartup.exe and right click on it.</li> <li>Click <b>End Process</b> to close the application.</li> <li>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>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>Click the Appearance tab, and then the <b>Effects...</b> button.</li> <li>Click the check box "Use the following method to smooth edges of screen fonts".</li> <li>Click the drop-down arrow and select <b>Cleartype</b>.</li> <li>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="#">"Begin talking using the designated Allworx handset, and then click End Call when finished," on page 23</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>







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

[www.allworx.com](http://www.allworx.com)

Version: 3.0 Revised 12/21/2016