Advanced Client Phone Training

Interaction Client 2.4.X
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This document outlines advanced features and configuration of the Interaction Client version 2.4.x.

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Conference Calls

Step 1:
Call the first person you want to include in the conference.

Step 2:
Call the next person you want to include in the conference. You can use the directories to click and dial or enter a phone number in the ‘number’ window and click ‘make call’. You do not need to put the first call on hold, the system will do that automatically as soon as you hit the “Make Call” button or click to dial.

Step 3:
Once the second call is connected, drag and drop one call from your interactions on top of the other. This will create a conference call between you and the two other callers. You will see the word ‘Conference’ under the name column in the ‘My Interactions’ tab. There is a + sign next to that which can be expanded to see who is on the conference call.

Note: Repeat steps 2 & 3 until you have called everyone you want to include in the conference.

You will also be able to include the person(s) that called you. You can include any and all connected calls that appear in your Interaction Client window in the conference call. If you want to add an additional person(s), call them and when they have answered, drag the call onto the conference call entry in the ‘My Interactions’ tab.
To disconnect someone else in the call, highlight the call you want to disconnect and click on the “Disconnect” button.

![Figure 2. Disconnecting a caller from the conference](image)

**Selecting Parties**

If you select a call within the conference, the buttons immediately below will color. This allows you to selectively disconnect parties, mute them, or put them on hold. Be careful that you are selecting the right party! Use the Name field to distinguish between them.

![Figure 3. Selecting Parties](image)
Assistance

If you are on an ACD interaction and need assistance from a supervisor, press the “Assistance” button. A small “Request assistance” window will appear.

Type a brief description of your problem and click “Send Request.” This will send a message to all designated supervisors for the particular queue experiencing the problem. Your supervisor may react by approaching you, coaching you, or listening to the call from their workstation. You will not necessarily be notified right away that someone has seen your message.

Figure 4. Assistance

Private Calls

In the event you need to make a personal call, you can mark it private. When the call is marked private, no one on the system is allowed to listen to the call.
Queues

If you have the appropriate rights, you can monitor calls in workgroup queues by adding tabs at to your client. To do this,

1. Open the client configuration and click on the ‘pages’ section.
2. Click on ‘manage pages’.
3. Click on the Queue category on the left.
4. Select the type of queue you would like to monitor (i.e. Workgroup Queue)
5. A list of queues that you have rights to monitor will appear on the right.
6. Select the queues you would like to monitor and click on ‘apply’. Click ‘ok’.  

The queues page will show you the calls in that queue.
How to Add Directories to the Interactions Window.

![Interactions Window](image)

**Step One:** To add a workgroup, put your cursor to the right of the last tab and right click. Select “Configure Pages…”

**Step Two:** Choose the directory type.

**Step Three:** Choose the pages to add by clicking the checkbox.

**Step Four:** When you are finished selecting, Click on “OK”.

![Client Configuration Window](image)

Figure 7. Interactions Window

It will be important for each of us to know everyone’s status so that we know if they are in the office. In order to view the user status from the Interactions window, you will need to add tabs for all of the workgroups.

To do this, right click in the grey area to the right of the last tab, as shown above.

Figure 8. Client Configuration Window
How to Add a Directory, continued

Figure 9. New Tab

The new tab has been created

How to Add Contacts to the Public or Private Directory

Figure 10. Adding Contacts

Step One: Click on the IC Public or Private Contacts tab – If you do not have this tab you need to create it – See your Advanced training Guide for instructions on How to Add Directories.
How to Add Contacts, continued

Figure 11. New Entries

Public and Private Directories

To add contacts to the public or private directory, follow these basic steps:

- Click “Insert Record” and the new entry properties box will appear. You can enter all the information in the fields and on multiple pages.
- If the entry is for the public directory, click the “Change” and “Delete” boxes at the bottom. This allows others to update the record in the future.

Recording Voice Prompts

Figure 12. Voice Prompts

Step One: Click on the Options menu, Configuration.
Recording Voice Prompts, continued

Figure 13. Personal Prompts

**Step Two:** Select “Personal Prompts”

**Step Three:** Select Record Name and follow prompts on phone. Hit “1” as soon as you are done recording.

**Step Four:** Hit “Apply” to save your prompt. You can review the prompt by hitting “Preview” next to the appropriate prompt.
How to set your Telephone Ring Tone

**Figure 14. Ring Sounds**

**Step One:** Select 'My interaction ring sounds' from the configuration menu.

**Step Two:** Use the browse button "..." to search your drive for a sound.

**Step Three:** Preview your ring with this play button.
Using the Follow Me feature

If you set your status to Available, Follow Me you can specify a list of numbers to call in an attempt to reach you. In this status, your default extension will ring first. If unanswered, the system will ring the numbers as configured below. To set up the list of numbers, open the configuration by clicking on the menu ‘Tools, Configuration’. Click on ‘Follow Me’ under the ‘calls’ section.

![Configuration](image.png)

**Figure 15. Follow me configuration**

**Step 1:** Click on ‘new’ & enter a phone number. This is the first number that will be called after trying the default extension.

**Step 2:** Enter a timeout value. This is the number of seconds you want the system to ring that number.

**Step 3:** Select an option to ‘Use Pin’. By specifying Yes here, you will be prompted to enter your pin when you are reached at that number. This will prohibit someone else who answers that phone from being connected to your call.

**Step 4:** Repeat steps 1-3 until you have all numbers configured.

**Step 5:** Choose the screen calls option if you wish to ask the caller to say their name. If you have this option selected, you will hear the name of the caller before you choose to be connected to the call being forwarded to you.
Monitored appearances

Monitored appearances allow you to easily monitor someone else’s queue (assuming you have rights to view the user’s queue).

![Monitored Appearances](image)

**Step 1:** Click on ‘Monitored Appearances’ in the left column.

**Step 2:** Click on ‘Add’ in the top right corner.

**Step 3:** Choose the user queue you would like to monitor from the drop down list labeled ‘Queue’. Assign a label. Click OK.

![Monitored appearances](image)

**Step 4:** Change settings as appropriate. This will determine whether your ring sounds play when that person receives a call, whether to pop the client or display desktop alerts. It also lets you specify a specific wav file to play when a call comes in on that queue.
One you complete the configuration, your client will have a ‘Monitored Appearances’ tab on the left with any queues you selected to monitor. You can switch between your queue and some one else’s queue just by clicking on the appropriate button.

Figure 17. Monitored Interactions Tab
Orbit queue

Parking a call in an orbit queue

You can place any connected call in a specific orbit. This places the call on hold and removes it from your station. Depending on the hold behavior your IC administrator configures, callers “in orbit” hear a combination of music and messages. To a caller, there is no difference between being on hold or in orbit.

Figure 18. Parking calls on orbit

Step 1: Right click on the interaction you want to park in orbit.
Step 2: Click on ‘Park on Orbit’.
Step 3: Enter a numeric value here.
The call will now be removed from your interactions and will show up in the orbit queue:

![Interaction Client: .NET Edition](image)

**Figure 19. Orbit queue tab**

**Retrieving a call from orbit**

Calls in orbit can be picked up at another station. This enables you to move to another station and resume the call without having to transfer the call to a specific extension. You can view and pick up calls in orbit by displaying the Orbit Queue page in Interaction Client .NET Edition. Click on the orbit tab, find the call you want to pick up and click on the ‘pickup’ button.

Another option (if configured) is to use the Polycom phone to pick up a call in orbit.

- **Step 1:** Pick up the handset
- **Step 2:** Click on the button labeled ‘pickup’
- **Step 3:** Enter the orbit number.
- **Step 4:** Press the button on the phone labeled ‘retrieve’