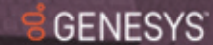


Interaction Desktop Quickstart Guide

Upgrading from Interaction Client .NET Edition to Interaction Desktop



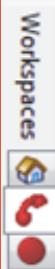
Workspaces

Workspaces are collections of views, like **My Interactions** and **Call History**.

You can create multiple workspaces with different collections of views.

Your CIC administrator can supply templates of workspaces with views geared to your job.

Select a tab to display a workspace.



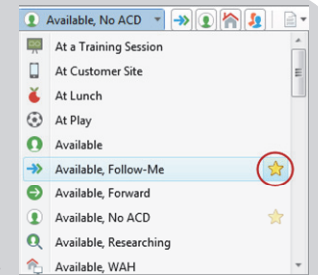
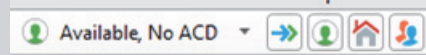
Toolbar

Customize your toolbar. To add or remove toolbars, right-click in the toolbar area. Rearrange toolbars by dragging and dropping the **Standard**, **Status**, **Workgroup Activation**, **Make Call**, and **Processes** toolbars.

Fast Status buttons

Create Fast Status buttons for your favorite statuses. To create a Fast Status button, select a star in the Status dropdown list.

To change your status, just click a Fast Status button.

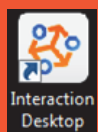


Views

Your favorite Interaction Client .NET Edition views, like **Company Directory**, also appear in Interaction Desktop.

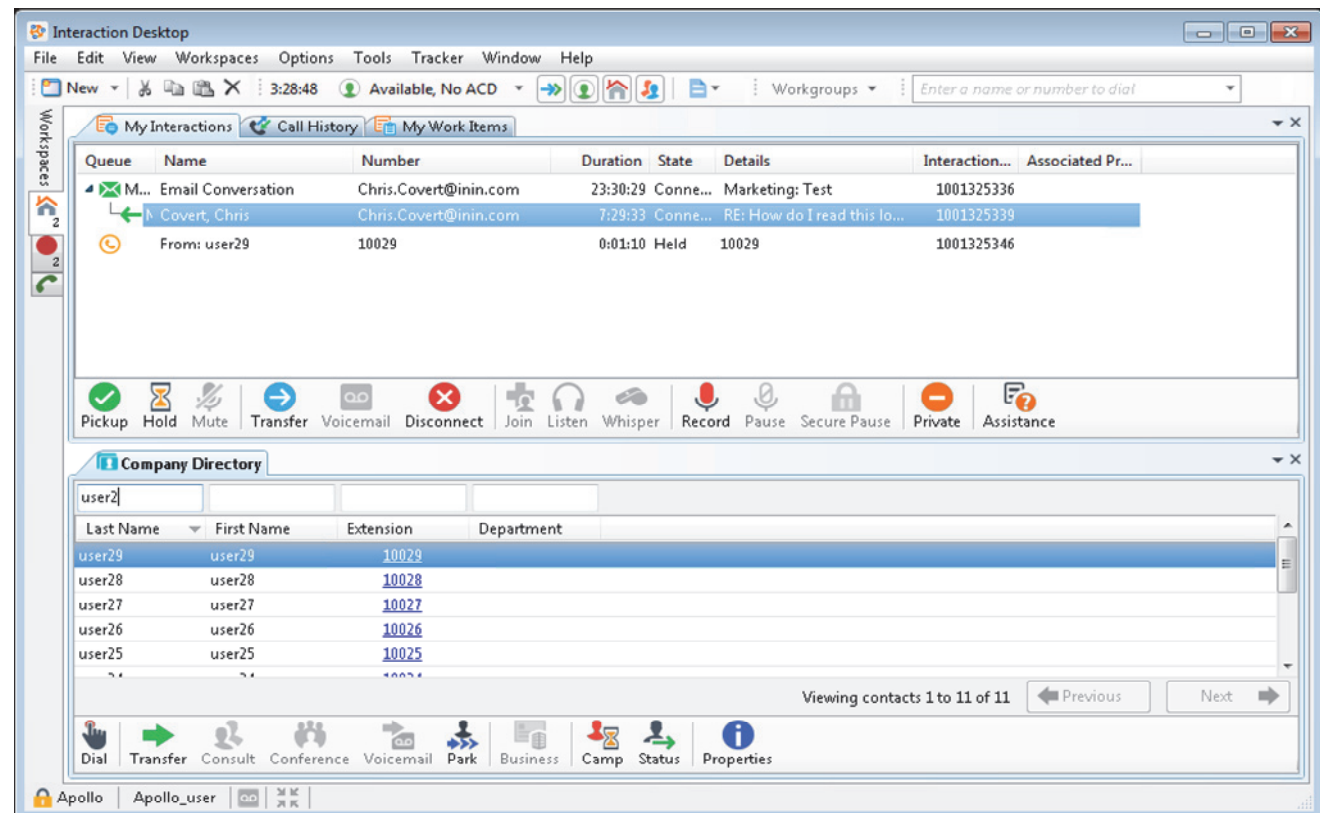
Use the **File** menu or the **New** button on the **Standard** toolbar to create new workspaces or add views to a workspace.

A full range of keyboard shortcuts are also available for configuring the Interaction Desktop interface. See the **Keyboard Shortcuts** help topic.



New Icons

Your Windows desktop shortcut, status indicators, tabs, and toolbar buttons have a new look.



New Email Management views in Interaction Desktop

You can manage email messages in these dedicated views. For ease of use, you can combine these views into a single email workspace.

Email Folders and Email List

The **Email Folders** view controls which email messages appear in the **Email List**. You decide which folder names appear in the Email Folder. Select one of these folders to determine which messages appear in the Email List. You can have a unique set of folders in each workspace.

If you do not display the **Email Folders** view or do not select a folder, the **Email List** displays all the email messages in **My Interactions** (your queue).

Email Editor

The **Email Editor** view displays a **selected, outgoing** and **connected** email message. Use the **Email Editor** to respond to an ACD-routed email message or start an email interaction on behalf of a workgroup.

If you use personal or system-wide stored responses in your email messages, display the **Response Management** view in the same workspace as the Email Editor.

If you add **Notes** to email interactions or assign **Account Codes**, also display the **Interaction Information** view.

The screenshot displays the Interaction Desktop interface with several views open:

- Email Folders:** Shows a sidebar with 'Drafts (1)' and 'Inbox (2)'.
- Email List - Inbox:** A table with columns 'From' and 'Subject'. It lists two messages: 'Java Joe User Conference' and 'Archadia Admin RE: User Conference'. Below the table are icons for 'Pickup', 'Hold', 'Transfer', and 'Discard'.
- Email Editor:** Shows a message header with 'From: Archadia Admin', 'To: Java Joe', 'Cc:', 'Bcc:', and 'Subject: RE: User Conference'. It includes buttons for 'Send', 'Discard', 'Attach', and 'Check Names'. The main content area contains a paragraph about registration and schedules for an upcoming user conference, followed by an 'Original Message' section with details: 'From: Java Joe [mailto:JavaJoe@Ofun.com]', 'Sent: Thursday, May 25, 2017 4:25:09 PM', 'To: Archadia Admin', and 'Subject: User Conference'. The body of the original message reads: 'I need information about your upcoming user conference'.
- Response Management:** Shows a search bar with 'uc' and a list of 'User conferences and webinars' with a description and an 'Insert' button.
- Interaction Information:** Shows a search bar with 'uc' and a list of 'User conferences and webinars' with a description and an 'Insert' button.