Client DDE API Developer's Help

Printed Documentation

PureConnect powered by Customer Interaction Center® (CIC)

2017 R4

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(See Change Log for summary of changes.)

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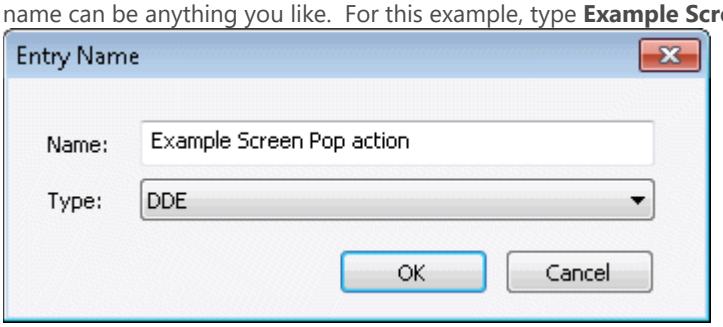
Interaction Desktop DDE API Developer's Guide

Define an Action

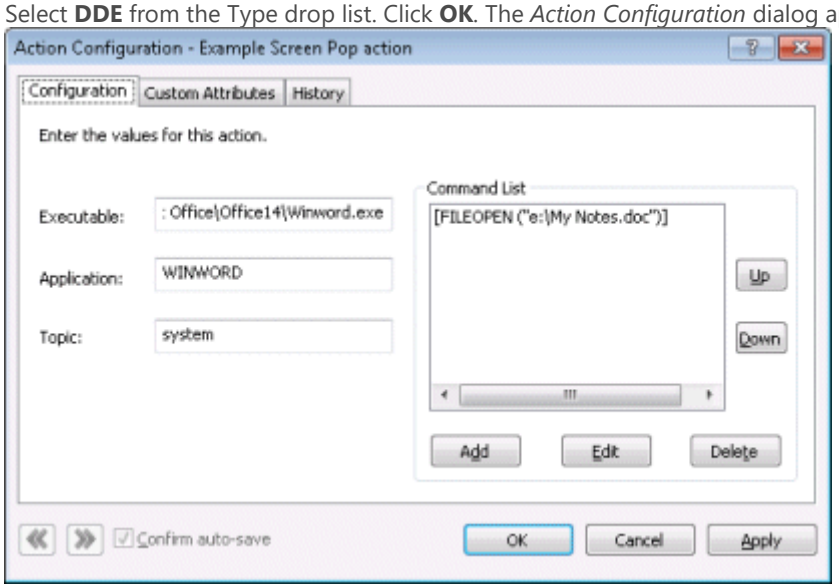
Use this procedure to define a DDE action in Interaction Administrator that specifies which application to pop. The action also specifies commands and data to send to the application.

For tutorial purposes, we will define an action that opens a Microsoft Word document when a call alerts on a user's queue.

1. Start Interaction Administrator and login.
2. Click the **Actions** container. This container is a child of the **System Configuration** node.
3. Press **Insert** to define a new action. The *Entry Name* dialog appears, prompting to name the action. This name can be anything you like. For this example, type **Example Screen Pop action** in the text field.

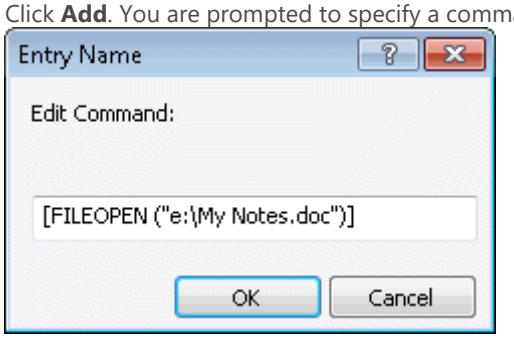


4. Select **DDE** from the Type drop list. Click **OK**. The *Action Configuration* dialog appears.



5. Type the **full path to the application** in the **Executable** box. For example, the full path to Microsoft Word 2010 is **C:\Program Files (x86)\Microsoft Office\Office14\Winword.exe**.
6. The **Application** box specifies the name of the application that the DDE conversation should be initialized with. This is usually (but not always) the name of the executable file (without the .EXE extension). Refer to the application's documentation for details. For this example, type **WINWORD** in this box.
7. The **Topic** box prompts for the topic name of the DDE conversation. The text you enter in this box is based on names of DDE server topics supported by the executable. For specific information about topics supported by your application, refer to its documentation. For this example, type **system** in the *Topic* box, since that is a valid topic name that Microsoft Word recognizes.

8. Click **Add**. You are prompted to specify a command string that the DDE Server should execute.



   Since command strings are unique to each DDE application, you'll need to consult the application's documentation for details. For this example, enter the following text as shown below.

   [FILEOPEN ("e:\My Notes.doc")]

   This command string tells Microsoft word to the existing document at the path specified. Feel free to adapt this string to open a different document that already exists on agent PCs. If you specify a document that does not exist on an agent's PC, Microsoft Word will display an error message when the action executes, noting that the file is not found. It does not create a new document if the file specified does not exist.

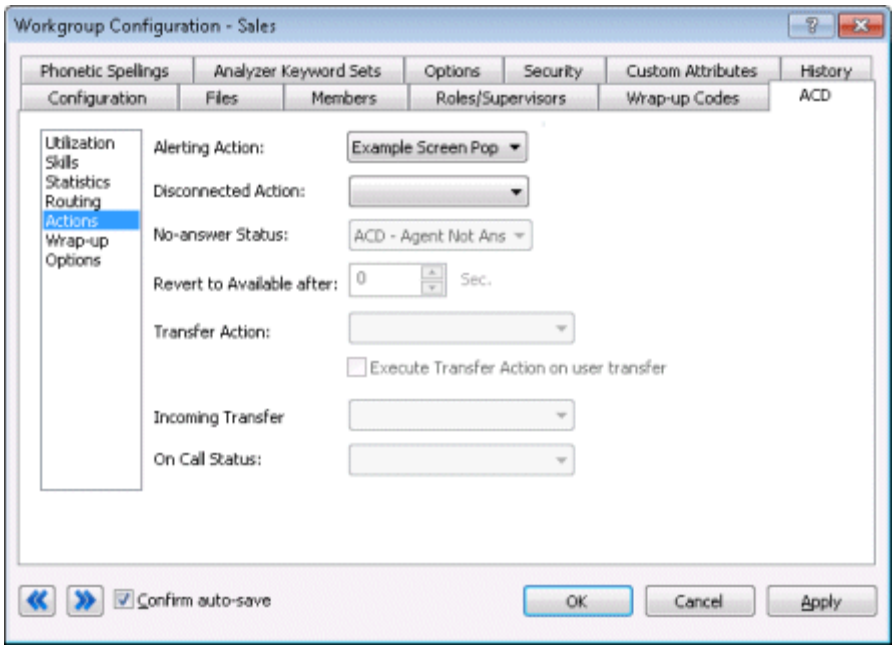
9. Click **OK**. The text entered will appear in the *Command List*.
10. Click **Apply** to save changes.
11. Click **OK** to dismiss the *Action Configuration* dialog.

At this point you have defined a new action, but it is not associated it with a queue. The next step is to register the action with a queue, so that CIC knows when to execute it.

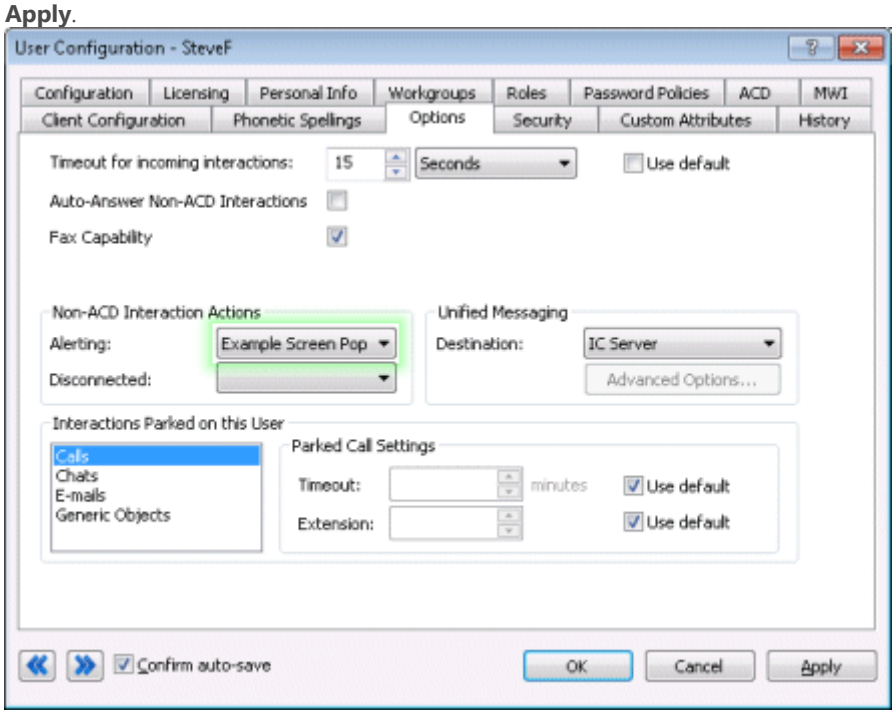
Register an Action

Registering an action associates it with a specific queue. The action will be triggered automatically when an interaction alerts on the queue, or optionally when an interaction is disconnected. To register an action:

1. Define an action, if you have not done so already. The steps you take in Interaction Administrator to register an action vary depending upon whether the action should be registered with a workgroup queue or a user queue.
2. In Interaction Administrator, click on the **Workgroups** or **Users** node below the **People** container. Then double-click a workgroup or user to open its configuration details.
3. For a *Workgroup* configuration, select the **ACD** tab. Click **Actions**, and then select an action from the *Alerting Action* drop list. Click **Apply**.



For *User* configurations, select the **Options** tab. Then select an action from the *Alerting* drop list. Then click **Apply**.



4. Click **OK** to dismiss the configuration. The action is now registered with a queue. At this point, you have successfully created an action and have associated it with a workgroup or user queue. Now, when a call alerts on the specified queue, a word document will pop on the screen.

To prevent Interaction Desktop from popping with the application, select *Configuration* from its *Options* menu. Then, under options for the *Alerting* node, uncheck *Pop Client*. Click OK.

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Revisons

CIC 2015 R1

Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to Interactive Intelligence Product Information site URLs, and copyright and trademark information.

C 4.0 Service Updates 1-4

No changes except for formatting, copyrights, and trademarks.

Interaction Center 4.0 GA

1. Updated copyright and trademarks in this document.
2. Since URL screen pops are configured differently from DDE screen pops in the Actions container, the DDE example in this document was rewritten to explain how to pop a word document when a call alerts on a queue. The previous example used DDE to invoke a page in Internet Explorer.