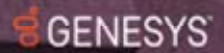


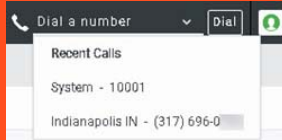
# Interaction Connect Quickstart Guide

Upgrading from Interaction Client Web Edition to Interaction Connect



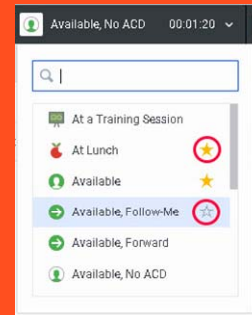
## Dial a Number

Click the phone handset icon, type a number and click **Dial**. Or select a number from the list of your most recently dialed numbers.



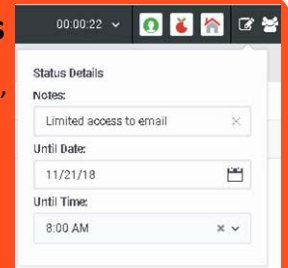
## Fast Status buttons

To create a Fast Status button, point to but don't select a status. Click an outlined star to add a fast status button or click a gold star to remove one. Click a Fast Status button to set your status.



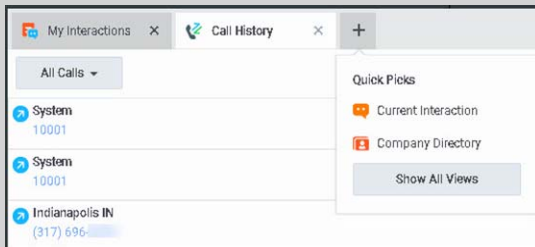
## Add Status Details

Depending on your status, add status details including status notes, forward number, and the date and time you will become available.



## Views

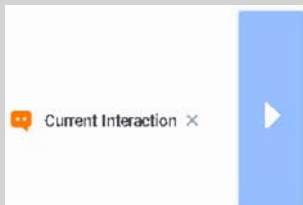
Standard CIC client views appear in Interaction Connect. Click the **Add View** icon (plus sign) in any group of tabs. Then select a view from the **Quick Picks** list or click **Show all Views** to select another view.



**Tip:** Drag and drop views by clicking on the view tab.

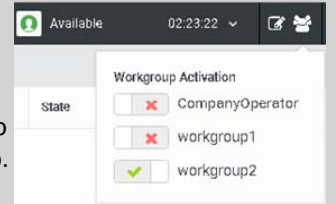
**Docking icons** appear and show you the locations where you can

create a new docking zone and move the view.



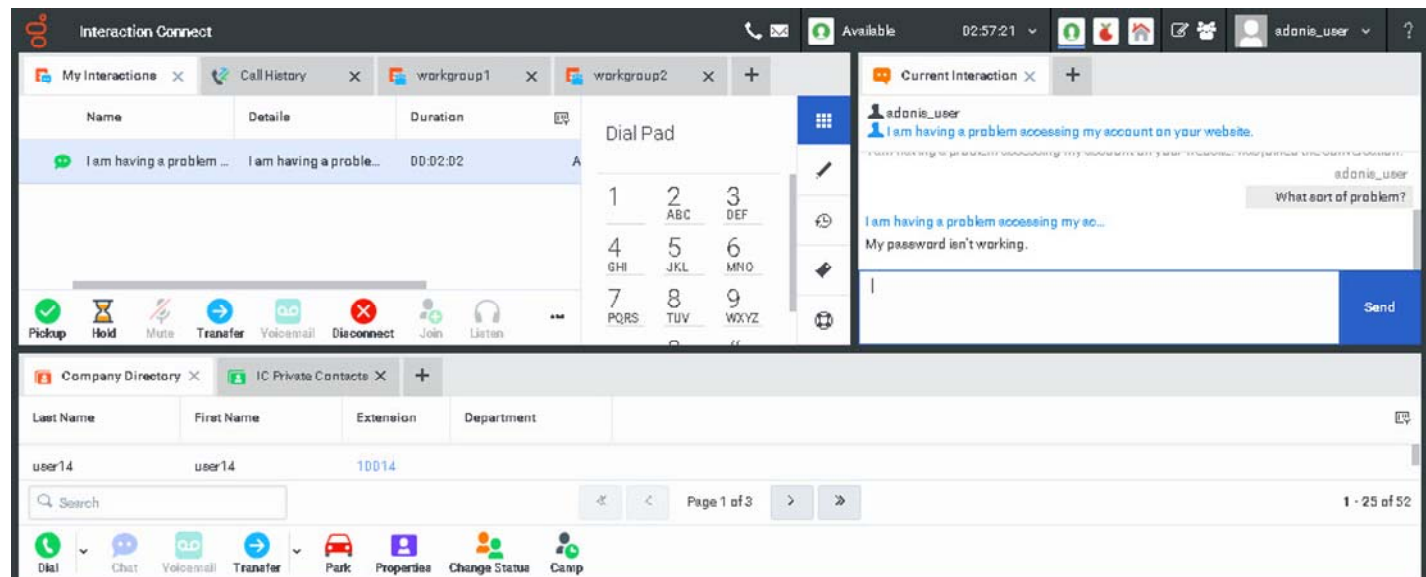
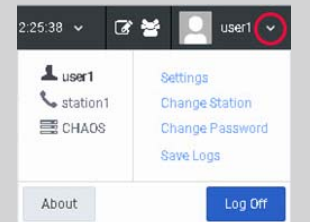
## Workgroup Activation

To receive ACD-routed interactions, set your workgroup status to active by setting the toggle switch to checkmark for the workgroup.



## Menu

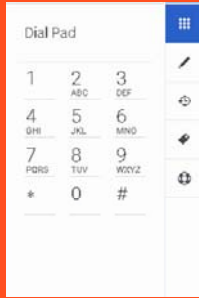
Click the down arrow to display the menu. Change your settings, station, and password. Check your logon information. Log off or save logs for Support.



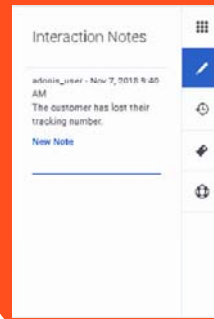
## My Interactions Sidebar

Choose what appears in the Sidebar by selecting an interaction and clicking the appropriate control.

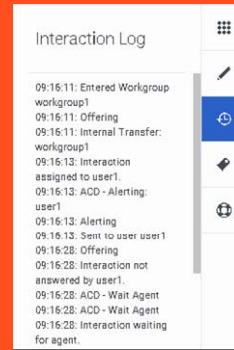
Use the **Dial Pad** to place a call, send DTMF tones to a selected or connected call or select from an automated telephone menu system.



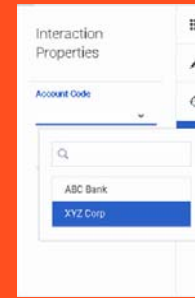
Make notes about a connected interaction in the **Interaction Notes** sidebar. Press Enter to add a note to the interaction.



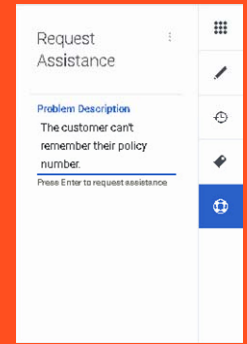
The **Interaction Log** displays the connection and routing details for a selected interaction.



Select an interaction and assign an **Account code** or **wrap-up code**. Account codes can group interactions for billing purposes. Wrap-up codes are useful for reports.



Select an ACD-routed interaction and **Request Assistance** from your workgroup supervisor.



## Email Interactions

### My Interactions

ACD-routed email messages appear in **My Interactions**. Pick up, hold, transfer and perform other standard interaction management actions here. Notice the reply to the original email is linked to it and appears on the following line.

### Current Interaction

Preview email interactions in this view. After you pick up an email interaction, this view becomes a full-featured Email Editor where you can create a reply.

## Response Management

Use stored responses to avoid typing the same information over and over again. Insert personal or system-wide stored responses in your email messages, chats, and Interaction Notes.

You can create personal responses in the Response Management Editor in Interaction Connect. See the Interaction Connect help for details.

