Create workspaces and add views

You can create custom workspaces to contain different views. These views can relate to one specific task such as managing calls or emails. If you no longer need a custom workspace, you can delete it.

Create a custom workspace

1. Do one of the following:
   - Click the down arrow to the right of the **New** button and select **Workspace**.
   - Select Workspaces > Create Workspace.
2. In the **Create New Workspace** dialog, type a **Name** and **Description**, and then select an Icon for the workspace.
3. Click **OK**.

Add views

You can add views like **My Interactions** or the **Company Directory** to custom workspaces. You can add the same view to multiple workspaces.

1. Open the workspace to which you want to add a new view and do one of the following:
   - Click **File** > **New** > **View**.
   - Click the down arrow to the right of the **New** button and select **View**.
   - Press the shortcut keys **Ctrl+Shift+N**.
2. In the **Create New View** dialog box, locate and select the view you want to add to the workspace and click **OK**.

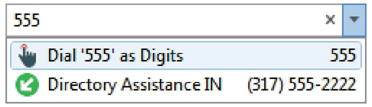
Manage phone calls

Using the toolbar

To manage your interactions, use the toolbar buttons on a queue view such as My Interactions. Many of these actions are also available by right-clicking an interaction.

Make a new call

Type a number in the **Enter a Name or number to dial** drop-down list and press **Enter** or select a number from the list.



Dial a recently dialed number

Do one of the following:

- Click the arrow at the end of the **Enter a Name or number to dial** drop-down list. Then click any number in this list of recently dialed numbers.
- In the **Call History** view, double-click a selected number. Or right-click a number and then click **Dial**.

Dial a number inside the organization

In the Company Directory, do one of the following:

- Double-click a name in the directory list.
- Click any phone number link and then click **Yes** at the Dial prompt.
- Right-click a name and click one of the displayed "Dial…" entries.

Answer a call

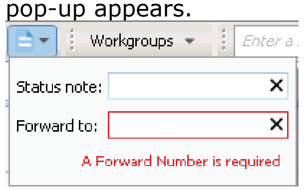
- If you are not connected to another call, pick up your telephone handset.
- If you are connected to another call, click the **Pickup** button. Interaction Desktop holds the first call.

Hold a call

- Select the call you want to hold, then click **Hold**, or right-click it and choose **Hold**.
- To reconnect to the call, click **Hold** again.
- To suppress hold music for the caller, click **Mute** before or after clicking **Hold**.

Forward your calls

1. From the **My Status** drop-down list, select **Available, Forward**.
2. Click the **Set status details** button to the right of the **My Status** list. The **Set Status** pop-up appears.

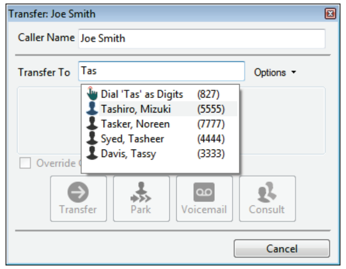


3. In **Forward to,** type the remote phone number for forwarded calls.
4. To save your status details, click outside the pop-up.

Disconnect a call

- To disconnect a call with your handset, just hang up the telephone.
- To use Interaction Desktop to disconnect a call, select the call and click the **Disconnect** button or right-click the call and choose **Disconnect**.

Transfer and park calls



Transfer a call to another person

1. Inform the caller of the transfer and on the Queue Control toolbar click the **Transfer** button. The **Transfer** dialog box opens.
2. In **Transfer To**, type all or part of the recipient's name or number. In the drop-down list, select the appropriate contact name and associated extension or phone number or select **"Dial [your entry] as Digits"** to convert a text entry into numbers.
3. Click the **Transfer** button or choose from the following transfer options:
   - **Park:** Holds a call in the recipient's My Interactions queue.
   - **Voicemail**: Directs the call to a recipient's voicemail.
   - **Consult:** Opens the **Consult Call** dialog box. There you can select the **Consult** button to speak to the transfer recipient while your caller stays on hold. Or select the **Caller** button to speak to the caller without exiting the transfer operation. If the recipient answers the phone and agrees to the transfer, select the **Transfer Now** button.

Manage voicemail

Listen to your voicemail

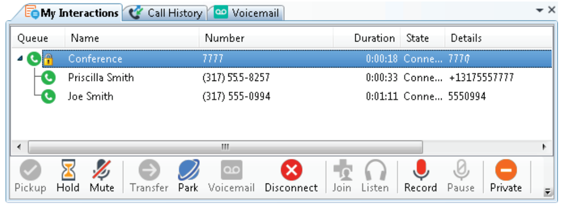
In your email inbox, open the email with the attached voicemail.

Either the **Interaction Voicemail Player** or your selected media player plays back your message, depending on your choice in the **Voicemail Player Options** dialog box.

Pick up a call in voicemail

You can answer a call while the caller is recording a voicemail message by selecting the call in a queue view and clicking Pickup. Or you can right-click the call and choose Pickup.

Conference calls



Create a conference call

1. Dial the number of a participant in the conference call, and then click the Hold button to put the call on hold.
2. Repeat step 1 for each participant.
3. Select one of the calls you want to conference and while holding down the mouse button, drag that call to another call in **My Interactions** and release. You see a new Conference interaction.

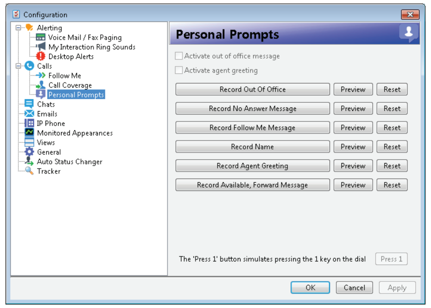
Conference call tips

- To **add parties** to a conference call, drag a connected call and drop it on the Conference interaction.
- To **join** a conference call, select the call or conference call you want to join and click the Join button.
- To **disconnect** someone from a conference call, from the list of joined calls in the conference, choose a participant and click the **Disconnect** button or right-click and choose **Disconnect**.

Manage Personal Prompts

Record your personal prompts

1. Open the **Options** menu, click **Configuration**, expand the **Calls** node, and then click **Personal Prompts**.
2. In the **Personal Prompts** page, click the button of the prompt you want to record. Interaction Desktop calls your station.



3. Pick up the call and record the prompt, then **press 1** to end the recording.
   Tip: If you selected **SIP Soft Phone** as **Station Type** when you logged on, select the **Press 1** button on the Personal Prompts properties pane to end the recording.
4. To review a recorded prompt, click the **Preview** button.
5. To return a prompt to a generic recording, click the **Reset** button.
6. Click **Apply** to save your changes.

Manage status

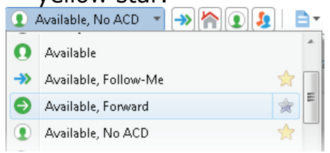
Set your status

Do one of the following:

- Select a status from the **My Status** drop-down list.
- In the notification area of your taskbar (at the lower right side of your main window), right-click your status icon and select a status.
- Click a Fast Status button.

Add or remove Fast Status buttons

1. In the **My Status** drop-down list, point to, but do not click, a status.
2. Do one of the following:
   - To add a **Fast Status** button, click a gray star.
   - To remove a **Fast Status** button, click a yellow star.



Set another person's status

Note: You need the **Change Status Users** Access Control right for a specific user to be able to change that user's status.

1. Right-click the user's name in the Company Directory or other directory view.
2. Select **Change User's Status** from the menu that appears. The **Set Status** dialog box appears.
3. Select a status from the drop-down list and enter other applicable status information.
4. Click **OK**.

Advanced user tips and shortcuts

Interaction Desktop contains shortcuts for frequently performed tasks.

Note: These shortcuts work only if you select an interaction or view before you use a shortcut. A view must have focus before you use the shortcut keys. A tab with its name in bold type indicates the view with focus.

For shortcuts to work properly, hold down the **Ctrl** or **Alt** key while pressing and releasing the second and then, if needed, the third key.

Interaction functions

Shortcut	Function	Shortcut	Function
Ctrl+B	Callback	Ctrl+D	Disconnect
Ctrl+P	Pickup	Ctrl+J	Join
Ctrl+H	Hold	Ctrl+L	Listen In
Ctrl+U	Mute	Ctrl+R	Record
Ctrl+T	Transfer	Ctrl+E	Pause
Ctrl+K	Park Orbit	Ctrl+I	Private
Ctrl+M	Voicemail	Ctrl+N	Assistance
Ctrl+Shift +P		Properties	
Ctrl+Shift +R		Remove from Queue	

Menu shortcuts

Shortcut	Function
Alt+F+O	Log off
Alt+F+S	Change Station
Alt+F+C	Close (hide) Interaction Desktop
Alt+F+X	Exit
Ctrl+Shift+N	Create a new View
Alt+R+C	Create a new Workspace
Alt+O+C	Configuration

More Keyboard Tips

The **Winkey** is the Windows logo key typically located between the **Ctrl** and **Alt** keys.

- To place Interaction Desktop on top of any other running Windows applications, in Windows 8, press **WinKey+N**. In previous Windows versions, press **WinKey+C**. If an interaction is in your queue, the focus is on **My Interactions**.
- To expand Interaction Desktop to full-screen mode, press **Winkey+up arrow**. To restore it to its previous size, press Winkey+down arrow.

More about Interaction Desktop

Help

- To learn about views and workspaces, click **Help** > **Getting Started**.
- To learn more about managing interactions, click **Help** > **Interaction Client.**

Online tutorial

Check with your CIC administrator about the availability of an online tutorial that shows you how to use Interaction Desktop.

My contact information

Corporate phone number: ____________

My direct number: ______________

My extension: ________________

My password: ________________

My email address: ______________

Other: ______________________

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