

Guide For Using Soft Phone

Logging into Soft Phone

1. Plug in your USB headset and wait for your laptop to state it is ready to use.
2. If you are not on campus, connect to the internet, then open and connect to VPN.
3. Double click the SIP Soft Phone Icon on your desktop, or go to Start, Programs, Interactive Intelligence and click SIP Soft Phone.
4. The Soft Phone icon will appear in your system tray, allow it a few seconds to update and start. Hold your mouse over the icon (without clicking) to see the status of the phone. When it says “Connected - <your number>” it is ready to use.



Figure 1 - System Tray

5. Open Interaction Client. If it is already open, go to File then Change Station...

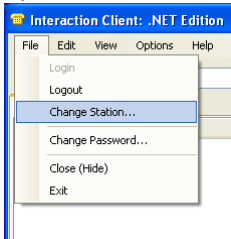


Figure 2 - Change Station

6. Under Station Type, select Workstation. In Workstation, type in the number of your soft phone as it appears (without the ‘Connected – ’) when you mouse over the soft phone icon on your system tray. Then click OK. When you are successfully logged into your soft phone, its number will appear in the bottom left hand corner of Interaction Client as per Figure 4.

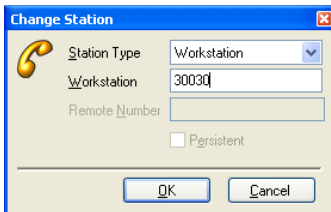


Figure 3 - Change Station Dialogue Box

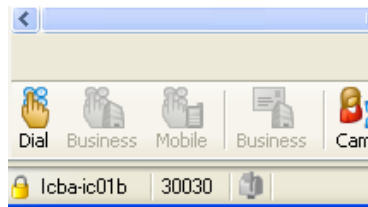


Figure 4 - Logged In

Using the Soft Phone

Now that you are logged into your Soft Phone, you will no longer need to use a desk phone to use the system. All the normal functions you would normally do with your desk phone are now done with Interaction Client.

Making a Call

To make a call, enter the number you wish to dial into the Number text box towards the top of Interaction Client then press the Make Call button. The number will be dialed using the Soft Phone.

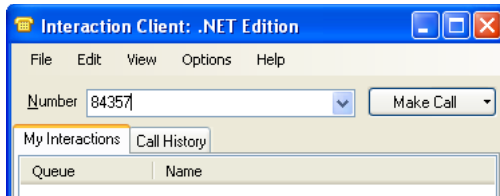


Figure 5 - Dialing

Receiving Calls

When someone calls you, a small window will pop up on your screen similar to the one below. Clicking the links do the following:

- Pickup – Answers a call
- Send to Voicemail – Sends the user to your voicemail for them to leave a message
- Hold – Answers the call then places them immediately on hold

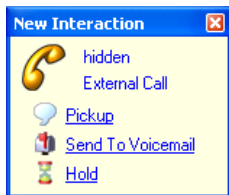


Figure 6 - Incoming Call

Working with Calls

Interaction Client provides you all the usual tools that your desk phone would to allow you to manipulate calls while using your soft phone. Simply click a button and follow the instructions. More information on what these functions do can be found in the Interaction Client Training Material.



Figure 7 - Interaction Client Toolbar