AltiGen Communications

MaxAgent™

Manual

MAX Communication Server
Release 6.5

7/2009 4503-0001-6.5

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Part Number 4503-0001-6.5

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About MaxAgent

MaxAgent is a Windows desktop application designed to improve the performance of workgroup and call center agents in a MAX Communication Server ACC/ACM (MAXCS) environment.

MaxAgent allows workgroup agents to manage workgroup calls from their computers. It allows direct access to call handling and other functions, including the following:

- Viewing caller data (for example, IP address, account number, credit card number, name, and so on) sent with an incoming call
- Viewing queue data and other workgroup-related statistics, agent's performance, and member login/logout
- Exporting and printing workgroup queue and performance data
- Setting up group meetings

In addition, MaxAgent integrates with Microsoft Outlook and Outlook Express, ACT!, and GoldMine® for caller screen pops and dialing out from these applications.

Call information can be stored to an internal or external CDR database for future review and analysis.

New in Release 6.5

The following features are new in Release 6.5:

- LinePark tab—If an extension is configured as a member of a line park group in MaxAdmin, the extension user can see and pick up a parked call from that group in the new **LinePark** tab of MaxAgent. A MaxAgent user can also park a call from within MaxAgent.
- The station conference bridge is released when the number of conference participants is reduced to two. The call can then be transferred, parked, or tagged with an account code, and another party with privilege can monitor, barge in, listen to, or coach the call.
- IPTalk configuration is enhanced to use IEEE 802.1p

Microsoft Outlook and Outlook Express Support

MaxAgent 6.5 supports Microsoft Outlook 2003 and 2007, and Outlook Express 5.0, allowing you to obtain phone numbers to dial from a Microsoft Outlook Contact list. MaxAgent also lets you see the incoming calls that have a matching record in the Contact list.

You must set up the Outlook Contacts list prior to using this feature.

ACT!/GoldMine® Support

MaxAgent 6.5 supports ACT! 2005, 2006, 2007, 2008 (version 10) and GoldMine® 6.0, 6.5, and 6.7 contact management software, allowing you to obtain phone numbers to dial from the ACT! or GoldMine® contact database list. MaxAgent also lets you see the matching record from the contact database list of the incoming calls.

Note: Before ACT! can work with MaxAgent, you MUST install the ACT! Plugin.

Licensing

The following AltiGen licenses are required:

- MaxAgent requires a MaxAgent seat license for each user, or a MaxAgent session license.
- The IPTalk feature requires an IPTalk license for each user, or an IPTalk session license.
- ACT! and GoldMine integration require an Integration Connector license for each user.

A system administrator can verify seat licenses in MaxAdministrator by selecting **License > Client SEAT License Management** from the main menu.

Installation

The client system must meet the following minimum requirements.

- IBM/PC AT compatible system
- Microsoft .NET 2.0 with SP1 framework (version 2.0.50727.1433)
- 2 GHz CPU or above recommended (mimimum is 1 GHz , but if you use 1 GHz, expect delays when loading large numbers of contacts)
- Windows XP Professional or Windows Vista Business Edition
- 1 GB available hard drive disk space
- 512 MB RAM
- SVGA monitor (1024 x 768) with 256 color display, or better
- Keyboard and mouse
- A sound card in the PC, if using IPTalk
- MAX Communication Server ACC 6.5 or MAX Communication Server ACM 6.5 running on a server accessible to this client.

Pre-Installation Checklist

Before installing MaxAgent, make sure the following is done:

- MAXCS ACC/ ACM 6.5 has been installed on the system server.
- TCP/IP is enabled on both machines.
- The client is able to connect to the server on the network.
- The person installing MaxAgent has local administrator rights on the client PC.
- The extension affiliated with the client PC has a MaxAgent Seat License assigned to it, or there is a MaxAgent Session License installed in the MAXCS system.

Installing MaxAgent on a Client System

When the above items are done, follow these steps on the client machine:

1. Exit all Windows applications.
2. Insert the MAXCS 6.5 Clients CD into the CD ROM drive.
3. Open the **MaxAgent** folder, and run the **Setup** program in that folder, following the step-by-step installation instructions as they appear on the screen.

Alternatively, if your system administrator has loaded MaxAgent on a shared network server, you can copy the files in the MaxAgent folder to your desktop PC, and run the MaxAgent **Setup** program.

Uninstalling MaxAgent

1. From the Windows **Start** menu, select **Control Panel > Add/Remove Programs > MaxAgent 6.5**.
2. Click **Remove**, and respond to any additional prompts.

Automatic Upgrade

Each time you start up MaxAgent, a comparison is made with the version of MAXCS ACC/ACM that is running on the server. If updates were made on the server, and your version of MaxAgent is out-of-date, you are prompted for upgrade permission. If you automatically upgrade, the MaxAgent startup is terminated and a software upgrade session is started. Restart MaxAgent to run the newer version.

Note: For remote MaxAgent users outside the firewall, TCP port 10050 is required to be open to allow automatic upgrade. Also, automatic upgrade over the Internet requires the sending of 15 MB files over the WAN, so it may take some time to perform the automatic update.

Downgrade Procedure

1. Go to **Control Panel** > **Add/Remove Programs** and remove the MaxAgent 6.5 program and ALL OTHER 6.5 client applications (including MaxCommunicator, MaxSupervisor, MaxOutlook, AltiConsole and CDR Search).
2. Reboot your system.
3. Install the earlier MaxAgent software, as appropriate.

CHAPTER 3

Getting Started

Start MaxAgent from the Microsoft Windows **Start** menu, by choosing **Start** > **All Programs** > **MaxAgent** > **MaxAgent**

Note: For users running Windows XP SP2, a firewall protection Security Alert may pop up when opening the login window. If this happens, click **Yes** to allow MaxAgent to run.

If you are connecting to the Internet through a modem connection, before you log in, establish a session connection from your PC to your local Internet service provider. If you're using a low-speed connection, the login may take some time, since a large amount of data is transferred to your desktop.

Logging In

1. If this is your first login to this MAX Communication Server ACC/ ACM system, enter the system server's IP address or the name of the system server you will be using. To obtain the server name or IP address, ask your IT administrator.

(Subsequently, when you log in, you'll see the IP address in the **Server Name** field. You may use the drop-down list to select a different server, if more than one server is available.)

2. Enter your **Extension** number and **Password** assigned to your phone.

   If you want to store your login password and have it entered automatically the next time you log in to MaxAgent, check the **Always save password** check box.

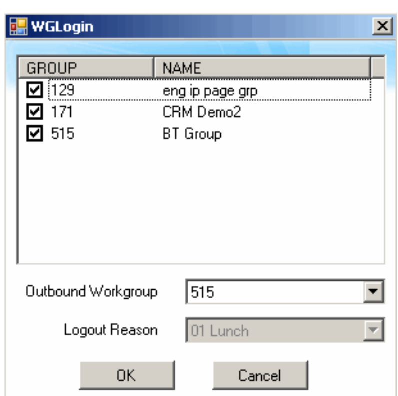
   Note: Up to eight unsuccessful login attempts are allowed, after which login will be disabled for from 1 to 24 hours (depending on the duration set by your system administrator).

3. If your extension is an IP extension and you will be using a headset, check the **Enable IPTalk softphone** check box. (An AltiGen IPTalk license must be assigned to your extension.)

   (Even if you do not have an IP *phone*, as long as your extension is set up as an IP extension by your system administrator, you can check the **Enable IPTalk softphone** check box.)

   See "Logging In Remotely" on page 7 for more information on using IP extensions remotely.

4. Click **Sign In** or press the Enter key. (To back out of signing in, click **Cancel** or press the Esc key.) The following dialog box appears:



5. Select the workgroup or workgroups you want to log in to. You can log in to eight workgroups simultaneously.

6. If the system administrator has allowed you to change your outbound workgroup, you may do so. (Your outbound calls are logged to the workgroup specified in **Outbound Workgroup**.)
7. Click **OK**.

Version Mismatch Dialog Box

If your version of MaxAgent doesn't match the version of MAX Communication Server on the system server, you are prompted for upgrade permission when you try to log in. If you allow upgrade at this time, the MaxAgent startup is terminated and a software upgrade session is started. Restart MaxAgent to run the newer version. (See "Automatic Upgrade" on page 4 for more details.)

Logging In Remotely

You can use MaxAgent from a remote location if

- MaxAgent is installed on your remote computer
- Your extension is configured as an IP or mobile extension by your system administrator
- You have an AltiGen-certified IP phone or are using IPTalk

Consult your system administrator or authorized AltiGen dealer for details on obtaining this equipment.

All the call handling functions are the same as when you log in locally, with the exception of the ability to configure One Number Access. You can pick up voice mail, forward local business office phone calls to another site such as a home desktop PC, and even receive phone calls as you would at the office.

To log in from a remote location

1. If you connect to the Internet through a modem connection, establish a connection to your internet service provider (ISP).
2. Log in using your **Extension** and **Password** as usual.
3. If you will be using a headset plugged into your PC, check the **Enable IPTalk softphone** check box.
4. Click **OK.**

IP Extensions Using IP Talk

To use IPTalk, you need an AltiGen-certified USB headset system (your phone system administrator or AltiGen dealer can recommend headsets).

Important: You can run only one instance of MaxAgent with IPTalk per system.

To make and receive calls using IPTalk

1. Connect your headset to your PC.
2. Use the MaxAgent dialing and call accepting functions as usual to make and receive calls.

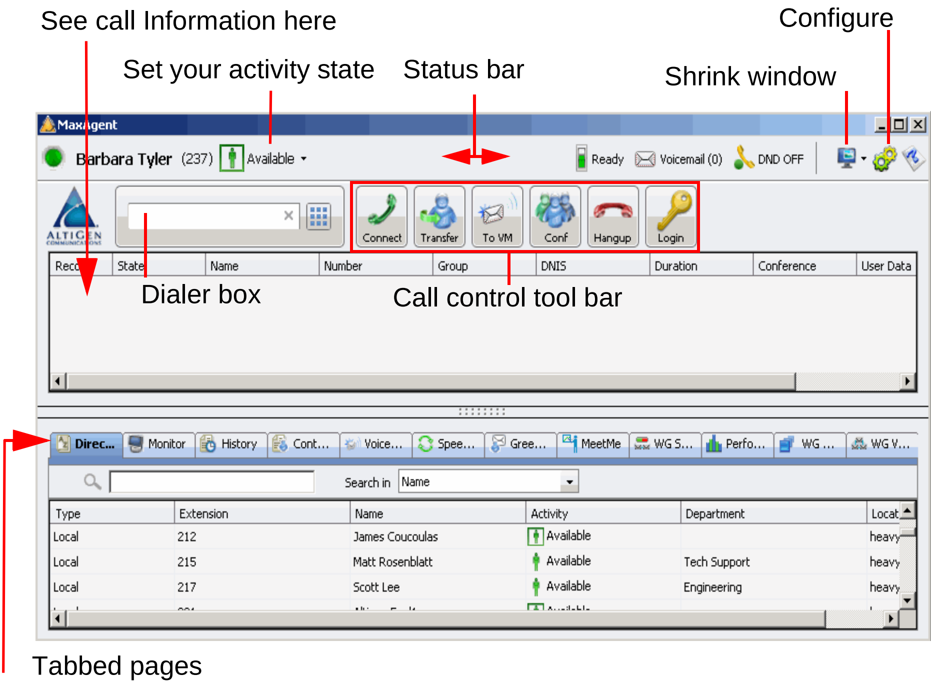
When Connection Is Broken

When a connection with the phone server is broken, a message box pops up asking if you want to connect again. Clicking **Yes** will restore the connection without you having to go through the log-in process again.

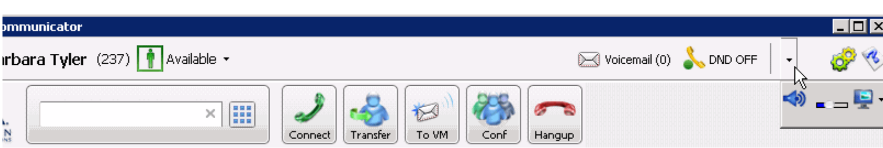
Overview of the Main Window

Once you log in to MaxAgent, the main window appears. This window provides tools to manage and monitor calls, and is your window into your workgroup environment.

You can customize the MaxAgent display: select the theme; the toolbar buttons, tabs, and columns you need and their order of appearance; the sort order; and so on. See “Customizing the Display” on page 17.



If you checked **Enable IPTalk** when you logged in, the right side of the toolbar looks a little different:

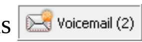


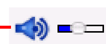
Click the Down arrow to access the **Mute** button, the **Volume** button, and the **Arrange Window** button that lets you shrink the window.

Status Bar

From the status bar you can do the following:

- Change your activity state from the drop-down list (see “Changing Activity Status and Recording Activity Greetings” on page 14).
- If you have configured Call Handling to forward all calls, see the target destination, for example, FWD AA .

- See when a call is in wrap-up mode (you have transferred it, sent it to voice mail, or hung up):  :
- Toggle between Ready and Not Ready  .
- See the number of unopened voice mails  .
- Turn Do Not Disturb (DND) on and off  (see “Turning Do Not Disturb On and Off” on page 15).
- If you’re using IPTalk, you can mute the call (using the **Mute** toggle button) and control the volume using the volume control.

Mute button (toggle)  Volume control

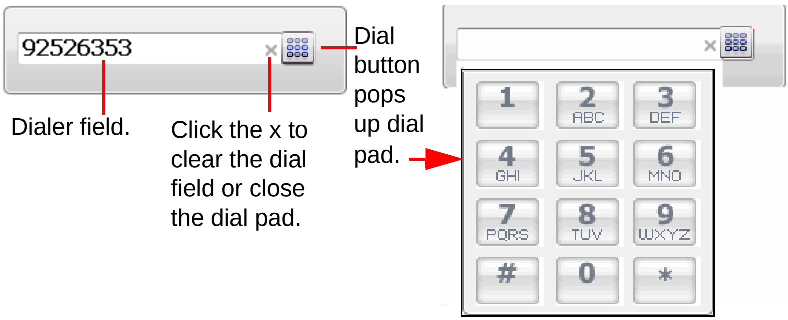
- Shrink MaxAgent to a single tool bar and restore it to normal size by selecting from the drop-down menu  .
- Configure MaxAgent  (see “Configuring Your MaxAgent” on page 55).
- Open help .

Toolbar Buttons

Toolbar buttons provide single-click functions to connect, hangup, transfer, send to voicemail, hold, conference, send calls to **AA** (auto attendant), flash, record, redial, intercom, and enter account code. The **Login** button lets you log in to other workgroups or log out of a workgroup.

You can choose the buttons you want and the order in which you want them. See “Customizing the Display” on page 17.

The **Dialer** field and **Dial** button are also in the toolbar. Click the **Dial** button to pop up the dial pad.



Call Information Panel

The call information panel displays several columns of information about calls:

Record— shows when a call is being recorded

State—the state of the currently active call:

- **AA**—the call is being transferred to an auto attendant
- **Busy**—callee is busy or not available
- **Call Pending**—the call is placed into a workgroup queue
- **Conference**—the call is in conference
- **Connect**—the call is connected
- **Dial Tone**—a dial tone is present, and MaxAgent is ready to dial out
- **Error**—receipt of an error tone
- **Hold**—the call is on hold
- **Hold Pending**— the call is being transferred or conferenced
- **Idle**—the extension is not in use
- **Play VM**—playing voice mail (The **Duration** field displays the duration of the voice mail as it plays. The duration display does not reflect fast forward or fast backward.)
- **Record**—recording an introductory message
- **Ringback**—caller sees this state while the callee’s phone is ringing
- **Ringing**—an outgoing call is ringing another phone or an incoming call is ringing your phone

Name—the name of the person on the other end of the call, if available

Number—the phone number at the other end of the call

Group—your workgroup number for this call

DNIS—the DNIS number, if appropriate

Duration—duration of the call

Conference—indicates the conference host

User Data—data entered by an agent and carried with a trunk call

IVR Data—this field is filled by the IVR

To hide a column you don't want to see, right-click a column heading and uncheck the column.

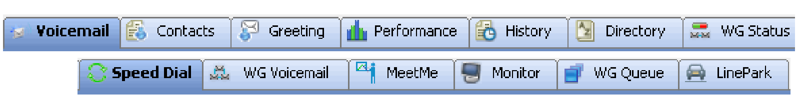
To rearrange columns, click and drag a column heading to where you want it.

Accessing a Context Menu for a Call

You can right-click a call to access a context menu for that call. Then select from commands available for that call.

Tabbed Pages

Thirteen tabbed pages are available on the bottom half of the MaxAgent screen: Voicemail, Contacts, Greeting, Performance, History, Directory, WG Status, Speed Dial, WG Voicemail, MeetMe, Monitor, WG Queue, and LinePark.



Voicemail—A log of unopened and opened voice mails left at your extension. Columns include: Type, Number, Caller Name (if available from extension information or from an external database), Date/Time, Duration, and Note. See "Dealing with Voice Mail" on page 43.

Contacts—A list of contacts you have added to your MaxAgent. Columns include: Name, Company, Business Phone, Mobile Phone, Email Address, IM Address, OCS Presence, Home Phone. To find out how to add contacts to your MaxAgent, see "CRM Integration" on page 67.

Greeting—From the **Greeting** tab, you can record and review greetings for each Activity state. See “Changing Activity Status and Recording Activity Greetings” on page 14.

Performance—Shows your performance since midnight for each workgroup you’re logged into. Includes direct calls and workgroup calls. Shows amount of time you were logged in, not ready, DND/FWD, on inbound calls, on outbound calls, in wrap-up mode, and in hold state. See “Viewing Your Workgroup Performance” on page 51.

History—A history of your incoming, outgoing, and missed calls. Columns include: Direction (inbound - red arrow, outbound - green arrow, missed), Number, Name, Date/Time, Duration, DNIS, Group, and Note. See “Viewing the Call History” on page 48.

Directory—Lists the extensions of people at the company. Columns include: Type (local, remote), Extension, Name, Activity, Department, Location.

WG Status—Shows the real time status of all the workgroups you’re logged into. Columns include: Workgroup Number, Workgroup Name, Login/Out Status, Calls In Queue, Calls In Queue > SL, Longest Queue Time, New, Agents Logged In, Total Busy Agents, Total Agents Not Available, % of Calls That Exceed Threshold. See “Checking Workgroup Status” on page 50.

Speed Dial—A list of speed dial numbers entered by the system administrator and entered at the extension. Columns include: Type (extension speed dial or system speed dial), ID, Name, Number, and Note. See “Dialing Speed Dial Numbers” on page 25.

WG Voicemail—A log of unopened and opened voice mails left at the workgroup extension(s). Columns include: Type, Number, Caller Name (if available from extension information or from an external database), Date/ Time, Duration, Group, and Note. See “Checking Voice Mail” on page 43.

MeetMe—From the **MeetMe** tab, you can schedule and monitor phone meetings. See “MeetMe Conference” on page 32.

Monitor—A list of extensions you have chosen to monitor. Columns include: State, Extension, Name, Activity, DND/FWD, Caller Name, Number, Department, Location, DNIS, and Duration. See “Monitoring the Activity of Other Extensions/Workgroups” on page 46.

Line Park—Shows calls parked for line park groups that you are a member of. You can pick up a parked call from the **LinePark** tab. Columns include: Park (the Park ID), Extension, Caller Name, Number, DNIS, and Duration.

To park a call in MaxAgent, click the **Flash** button on the call control tool bar (you must customize your tool bar to display the **Flash** button), enter #41 (system call park) or #31 (personal call park) in the dialer field, then click the **Connect** button on the call control tool bar.

WG Queue—Shows all the calls in queue. You can pick up a call from queue if the system administrator has allowed it for your extension. The following fields are included: ID, Group, Queue Time, Priority Queue Time, Caller ID, Caller Name, DNIS, Priority, SKLR, and Type. See “Viewing Queues” on page 52.

Changing Activity Status and Recording Activity Greetings

You can specify your whereabouts, so that others are informed. Click the Down arrow on the **Activity** button 

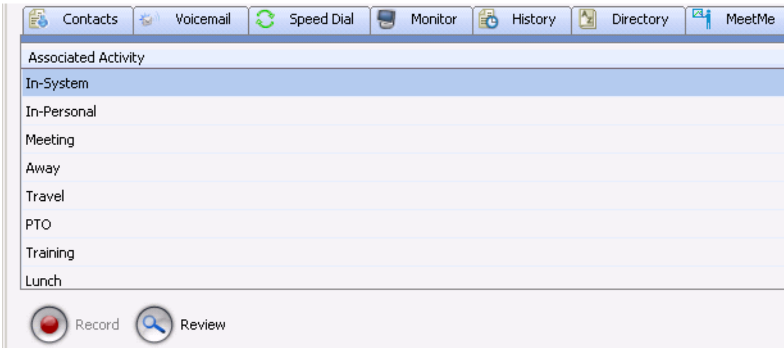
and choose the appropriate category:

- **Available (System)** (the system greeting is used)
- **Available (Personal)** (your personal greeting is used)
- **Meeting**
- **Away**
- **Travel**
- **PTO** (personal time off)

Your system administrator may have configured additional activities to select from.

The activity category you select appears beside the button. Keep your Activity status updated.

You can record a different greeting for each Activity status. To do so, click the **Greeting** tab, and select an Activity. Then click the **Record** button at the bottom of the tab to record a greeting. (Alternatively, you can right-click the activity, and select **Record**.) Use your phone or headset to record the greeting.



To hear the greeting played back, click the **Review**. button. Change your greeting whenever you want to.

Setting Status to Ready or Not Ready

The Ready/Not Ready button is a toggle. Click it to tell the system not to send workgroup calls to your extension. Click it again to tell the system you are ready to receive workgroup calls.

Turning Do Not Disturb On and Off

The  button is a toggle that turns **Do Not Disturb** on and off. When **Do Not Disturb** is on, all incoming calls are forwarded according to your **Enable Busy Call Handling** settings.

Note: If the system administrator has disabled the Do Not Disturb feature for the extension, the **DND** feature will not be available to you. If you select **DND**, an alert pops up informing you that DND is not allowed.

Log Out or Change Workgroups

You can log out of a workgroup or change the workgroups you're logged in to as follows:

1. Click the **Login** button  to open the WG Login window.
2. To log out or change workgroups, deselect the check box(es) next to the workgroup(s) you're logging out from.

3. If logout reason codes are required in your system, select one in the **Logout Reason** drop-down list.
4. If you want to log in to other workgroups, select their check boxes.
5. Click **OK**.

Minimizing and Exiting MaxAgent

Minimize - To minimize MaxAgent, click the **Minimize** button in the top right corner of the screen. MaxAgent shrinks to an icon in the tray in the lower right corner of your screen.

Exit - If you are shutting down Microsoft Windows, MaxAgent will exit automatically. Otherwise, to exit MaxAgent, click the button at the top right of the MaxAgent window. To exit MaxAgent when you have shrunk it to a single toolbar, first restore it to normal size, then click the exit button.

Shrinking MaxAgent

To shrink MaxAgent to a strip at the top or bottom of your screen, click the **Arrange Window** button and select **Top** or **Bottom**. The strip displays the MaxAgent status bar, the workgroup number and name, number of calls in queue, longest queue time, plus no more than six call control buttons and the dialer field:

Default call control buttons

To restore MaxAgent to full view, click the **Arrange Window** button and select **Normal**.

When MaxAgent is shrunk and you put a call on hold (by clicking on the **Hold** button), the number flashes. Clicking the number reconnects to the call.

Note: If a new call comes in while a call is on hold, MaxAgent changes to normal size automatically, allowing you access to both calls.

Using the Windows Tray Phone Icon

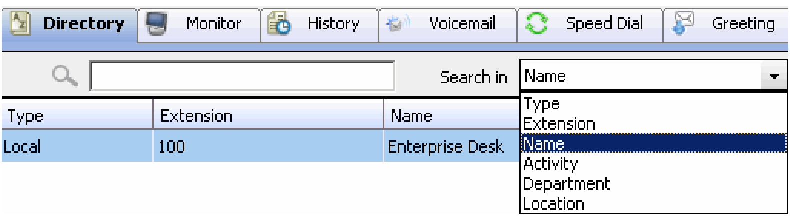
After you log in, the MaxAgent icon is displayed in the Windows tray, normally at the bottom right of your screen.

When you have new voice mail, the icon changes to show you have voice mail.

If MaxAgent is not on your Windows desktop, but either icon appears in the Windows tray, double-click it to open the MaxAgent main window.

Searching in the Tabbed Windows

Searching is available in these tabs: Directory, History, Contacts, Voice Mail, WG Voicemail, and Speed Dial.



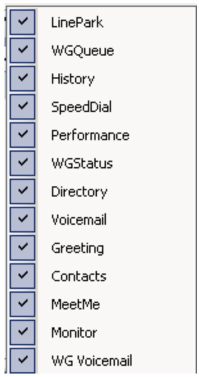
To search,

1. In the **Search in** field, select the column you want to search in.
2. Put your cursor in the field beside the magnifying glass, and type what you're looking for. The search begins as you type, and the list is narrowed to records that match what you're typing.
3. When you begin a new search, all the information that was on the tab reappears. Or you can clear the field beside the magnifying glass or make another selection in the **Search in** field, and you'll see all the information on the tab.

Customizing the Display

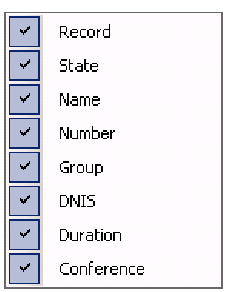
You can customize the MaxAgent display to meet your needs in the following ways:

- **Resize MaxAgent** windows by using the standard Windows method: place the cursor at a window edge or corner, then drag the window to the size you want.
- **Specify the tabs** you want to to display: right-click on the area just above the tabs. A list of tabs appears:



Check the tabs you want to display, and uncheck the tabs you don't want to display.

- **Specify the columns** you want to see by right-clicking a column heading and checking or unchecking columns in the pop-up list. Checked columns will be displayed.



- **Resize columns** by placing the cursor on a column divider in the header area until the cursor changes to a movable double bar (||). Then move the bar to resize the column.
- **Rearrange columns** by clicking and dragging a column name to the location you want.

Moving the **Record** column to the right

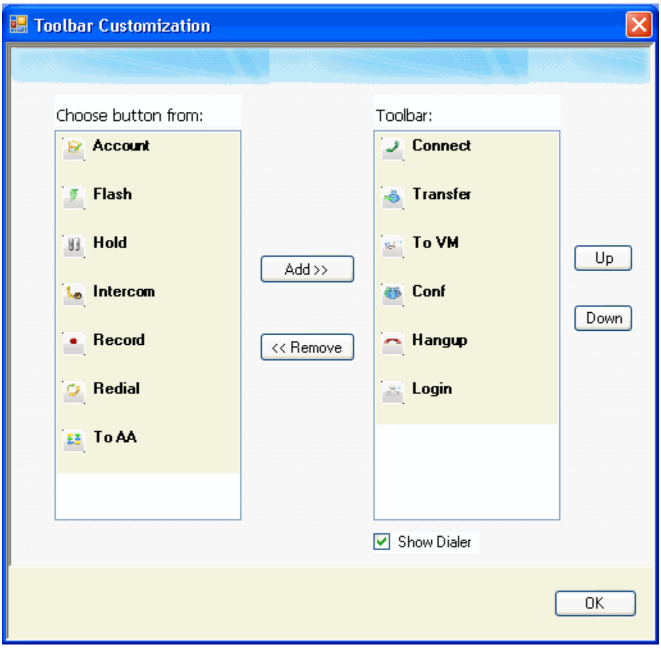
- **Sort columns** in ascending or descending order by clicking the column heading. An ascending (first to last) or descending (last to first) arrow appears. Click the column heading again to sort in the reverse order. If you click a column heading, and all the data in that column is the same, MaxAgent keeps the sort order of the previously clicked column.

Ascending order

Descending order

- **Add, remove, and rearrange the toolbar buttons** in MaxAgent by right-clicking in the button area and choosing **Customize Toolbar Buttons**. 

The Toolbar Customization dialog box opens:

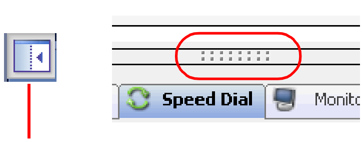


The buttons displayed in your MaxAgent are in the right-hand list. To remove a toolbar button, select it and click **Remove**. To add a toolbar button, select a button from the list on the left, and click **Add**. To rearrange buttons, select a button from the list on the right, and click the **Up** button or **Down** button, until the toolbar button is where you want it. When finished, click **OK**.

Note: When MaxAgent is shrunk to a strip at the top or bottom of your screen, six buttons are initially displayed by default in the shrunken toolbar: **Connect**, **Transfer**, **To VM**, **Hangup**, **Redial, Hold**. These are the only buttons available to a shrunken toolbar. You can remove any of them in the way just described and add them back again.

When MaxAgent is made normal size, the buttons you originally selected are again displayed in the toolbar. In other words, you configure the normal toolbar and the shrunken toolbar separately, and MaxAgent keeps your preferences for each.

- **Remove the dialer field** by right-clicking a toolbar button and choosing **Customize Toolbar Buttons**, as above. In the Toolbar Customization dialog box, clear the check box beside **Show Dialer**. To display the dialer again, check the **Show Dialer** check box.
- **Pop up MaxAgent** when you have incoming calls. Pop ups work when MaxAgent is minimized or is a strip at the top or bottom of the window but *not* when you have exited. See “Call Alert Options” on page 61.
- **Drag and dock the tabs** by dragging the dotted area above them to the right arrow, the left arrow or the bottom arrow. Once you start moving the group of tabs, the arrows appear. Move the cursor to an arrow, and the tabs will be docked at the side you selected.



Dragging and docking tabs

When the docking arrows appear, they look like this

- **Drag and dock one tab** by dragging it by its tab until the cursor is on the arrow where you want the tab to dock.

- **Make a tab a separate window** independent of the MaxAgent main window by dragging it out by its tab, or by double-clicking the tab. Then you can resize the window and move it around.
  To dismiss the window, click the close button in the upper right corner.
  To return the window to the set of tabbed pages, drag it by its title bar to the tabs area.

A tab is being dragged from an independent window back to the tabs group.

CHAPTER 4

Using MaxAgent as a Workgroup Agent

MaxAgent call handling-related functions include:

- Answering calls, page 23
- Dialing out, page 24
- Placing calls on hold, page 26
- Using call waiting, page 27
- Transferring calls, page 27
- Conferencing, page 30
- Recording Calls, page 41
- Using account codes, page 41

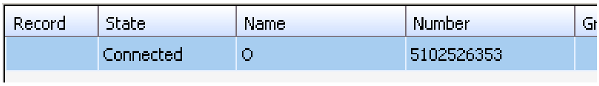
In addition you can do the following:

- Check voice mail, page 43
- Monitor other extensions, page 46
- View the history of calls, page 48
- E-mail and IM from the Contacts tab, page 50
- Check workgroup status, page 50
- View your own workgroup performance, page 51
- View queues, page 52

Answering Calls

To answer a call click the word *Ringing* in the call's **State** cell. The state changes to *Connected*.

Record	State	Name	Number	Group
	Ringing	O	5102526353	



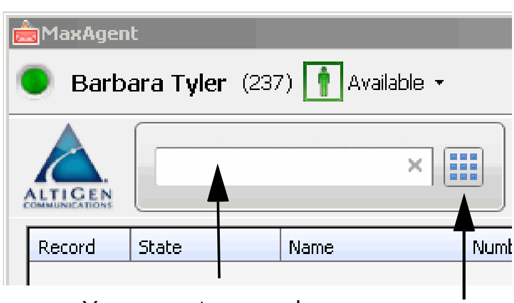
Or, click the **Connect** button in the toolbar.

Dialing Out

To dial a number, click in the dialing field, enter a number or name, and then click the **Dial** button or press **Enter** on your computer keyboard.

- **Enter a number**—You can enter a number in the dialing field by using the standard numeric keys or numeric keypad on your computer, or by using the dial pad in MaxAgent.
- **Enter a name**—For names recorded in the system, you can enter a name by using the keyboard on your computer to type the name. Then select the name from the drop-down list that opens. The number for that name appears in the dialing field.

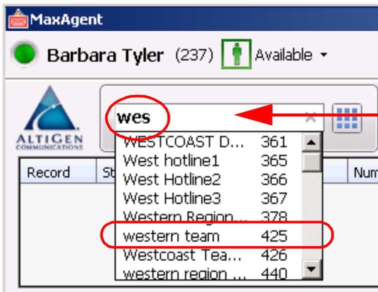
  To close the drop-down list or clear the dialing field, click the “x” in the field.



You can start typing a name in the dialing field to open your company directory list. Then select a name.

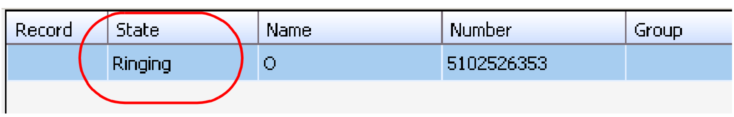
You can enter a number in the dialing field

You can click the **Dial** button to open the dial pad



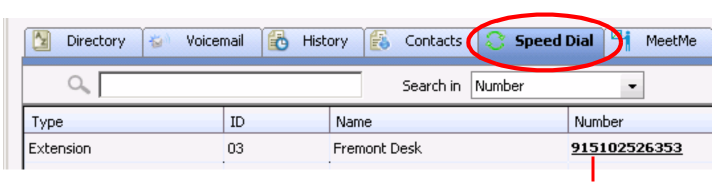
Searching for "western team" by starting to type in the dialing field

The Call Information panel displays the state of the call:



Dialing Speed Dial Numbers

To dial speed dial numbers, click the **Speed Dial** tab:



Click the number to make the call

This tab lists speed dial numbers that you have configured at your extension (*extension* speed dial numbers), and it lists speed dial numbers, if any, that have been set up for your extension by the system administrator (*system* speed dial numbers). You can see in the **Type** column which numbers are extension speed dial numbers and which are system speed dial numbers.

To call a speed dial number, click the number in its **Number** column.

Setting Up and Editing Extension Speed Dial Numbers

To set up an extension speed dial number:

1. Click the **Speed Dial** tab and double-click an empty Extention type row. The Extension Speed dialog box pops up.
2. Enter a name, number, and note if desired.
   When you add an outside number, all *relevant* prefix digits such as trunk or route access number, the long distance prefix **1** and area codes must precede the phone number.
3. Click **OK**.

You can enter up to 20 speed dial numbers.

Note: Extension-type speed dial numbers also can be set up by using the **#25** feature code on your phone set.

To edit a speed dial number in MaxAgent, double-click in its **Type**, **ID**, or **Name** columns. The Extension Speed dialog box pops up. Make your edits, and click **OK**. To delete the information, clear the fields and click **OK**. If you just want to edit a note, you can double-click in the **Note** field on the **Speed Dial** tab and edit the note right in the table.

For system-type speed dial numbers, you can edit the note, but only the system administrator can edit the other fields.

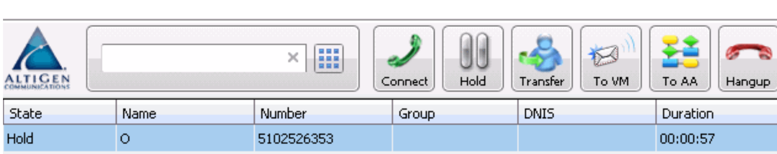
Redialing

To redial the last number called, click the **Redial** button. If the **Redial** button is not on your MaxAgent screen, you can display it by right-clicking on a command button, choosing **Customize Toolbar Buttons**, and adding **Redial** to your Customize Bar list. Click **OK**.

Or, you can click the **History** tab and click the last number you dialed.

Placing Calls on Hold

During a phone call, either click the word *Connected* in the call's **State** cell or click the **Hold** button in the MaxAgent toolbar. The state of the call is changed from *connected* to a *hold* state and you will hear the dial tone.



Click *Hold* in the call's **State** cell to release the hold and reconnect the call.

Note: When a call is put on hold automatically by the system (to queue), the system will ring you after two minutes if the call is still on hold.

Note: When you place a call on hold, workgroup calls may still ring your extension. To prevent this, click the **Not Ready** button. See "Setting Status to Ready or Not Ready" on page 15.

Using Call Waiting

During a call, you may receive another incoming call. To answer the call, click *ringing* in the new call's **State** cell. The call to which you were connected goes to the *hold* state.

Record	State	Name	Number
	Connected	O	5102526353
	Ringing	SANTA CRUZ CA	8318188219

Click *Ringing* to answer second call

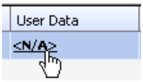
Record	State	Name	Number
	Hold	O	5102526353
	Connected	SANTA CRUZ CA	8318188219

The first call goes to *Hold* state

When you are ready to reconnect to the call on hold, click *Hold* in the **State** cell of the call. The call goes to the *connected* state.

Transferring Calls

MaxAgent allows for both supervised transfer (in which you confirm the transfer with the target) and blind transfer. Before transferring, you can type a note in the **User Data** field of the call (for the call to carry user data, it must be a trunk call), and that note will be displayed on the MaxAgent screen of the person receiving the transfer. The agent receiving the transfer can add data to this field but cannot delete data.



Clicking in the **User Data** field opens the User Data dialog box, where you can type a note. (See page 28.)

(What you type in the **User Data** field for the call is also displayed on the **History** tab in the call's **Note** field.)

Note: If user data is written to an *internal* call, the content is saved as a call memo but cannot be carried with the call.

You may transfer calls in the following ways:

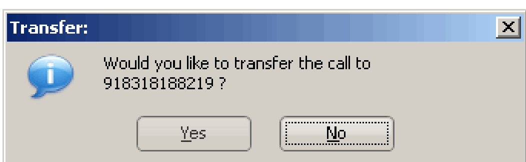
Dragging—Drag and drop the call (either while it's ringing or connected) onto the target number on the **Directory**, **Speed Dial**, **Contacts**, or **Monitor** tabbed pages.

Dialing—While connected to a call, in the dialing field enter the target number you want to transfer to, then click the **Transfer** button.

Clicking— If the target number is on the **Directory**, **Speed Dial**, **Contacts**, or **Monitor** tab, click it. Then click **Transfer**.

You're asked to confirm the transfer by clicking the **Yes** button in a confirmation dialog box.

You can click **Yes** before the party answers to do a blind transfer, or you can wait for the person to answer and then confirm or cancel the transfer.



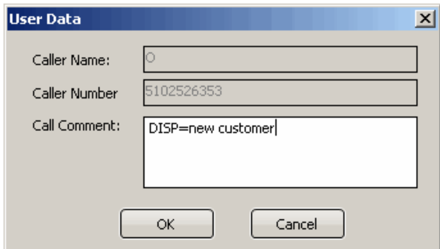
At any time before or after the person you're transferring to answers the phone, you can cancel the transfer by clicking the **No** button or by closing the dialog box.

If the transfer is canceled, MaxAgent reconnects the call to your extension. The call is also reconnected if the third party doesn't answer.

Displaying a Note on the IP Phone LCD

If you want the note you type in the **User Data** field of the call to be displayed on the IP phone LCD of the person receiving the call, do the following:

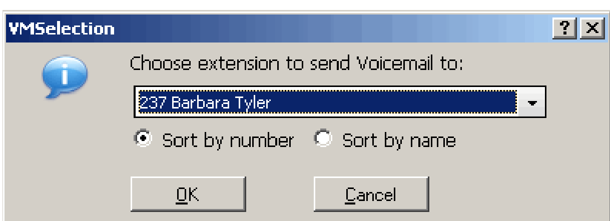
In the **Call Comment** field of the User Data dialog box, enter `DISP=` and follow that with your text (for example, `DISP=new customer`). DISP (for "display") is case-sensitive.



This feature works only with inbound trunk calls.

Transferring to Voice Mail

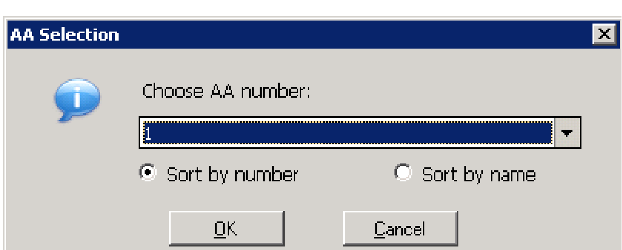
While connected to a call, click the **To VM** button in the toolbar. In the box that pops up, choose the extension you want to send the call to, then click **OK**. (You can sort extensions by number or by name.)



Note: You can also forward a call to voice mail without answering it by clicking the **To VM** button while the call is ringing.

Transferring to Auto Attendant

To transfer a call to an auto attendant, while connected to the call click the **To AA** button. The AA Selection box pops up. Use the drop-down list to select an auto attendant to transfer to. (You can sort the list by number or by name.)



Note: You can forward a call to an auto attendant without answering it by clicking the **To AA** button while the call is ringing.

Forwarding Calls Using Do Not Disturb

If allowed, click the **DND** button to forward all incoming calls according to your “Enable Busy Call Handling” settings. See “Busy Call Handling and No Answer Handling” on page 54.

Making Conference Calls

There are two types of conference calls in MaxAgent:

- **Station conferencing**. In this type of conferencing, when you’re on a call, you can dial a third party and then conference that party in to the call. Any internal user is able to add parties to this type of conference call.
- **MeetMe conference**. If your company has this feature available, you can schedule a meeting to take place at a specified time in the future and invite people to the meeting. Invited people call the MeetMe conference extension number to join the meeting at the designated meeting time. (See “MeetMe Conference” on page 32.)

Station Conferencing

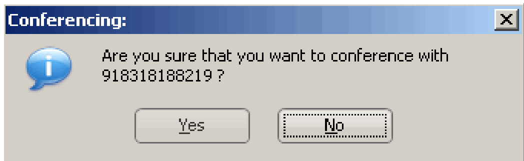
Using this method, you may conference up to six calls.

Note: In order to conference *incoming* calls, **Single Call Waiting**, **Multiple Call Waiting** or **Live Call Handling** must be checked in the MaxAgent Configuration window, **Extension > Call Handling** screen.

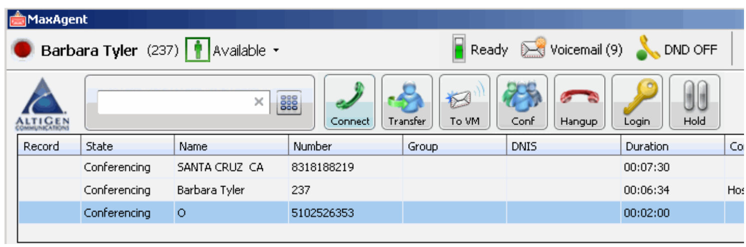
You may conference calls in the following ways:

- **Dragging**—While connected to one party, drag a *Hold* call to the *Connected* call, or drag a number from the **Directory**, **Speed Dial**, **Contacts**, or **Monitor** tabs to the *Connected* call. Repeat to add more callers. Each call in the conference displays *Conferencing* state.
- **Dialing**—While connected to one party, in the dialing field enter the extension or phone number you want to conference with, then click the **Conference** button.

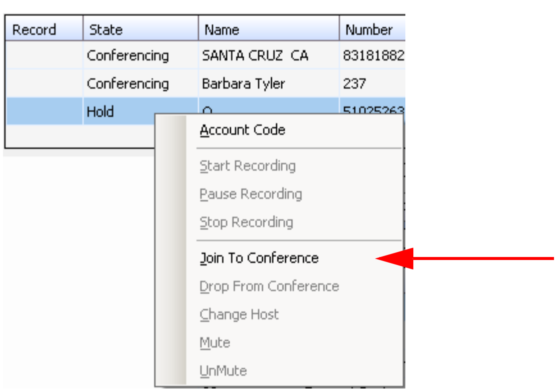
  While MaxAgent dials the new number, the other party or parties go into *Hold Pending* state, and you see a confirmation dialog box.



After the dialed party answers, click **Yes** in the dialog box. If the dialed party does not answer, click the **No** button.



- **Selecting from Menu**—When a call is on hold, you can add it to the conference by right-clicking the call and selecting **Join to Conference**:



Canceling Conference Calls

You can cancel the conference using any of the following methods:

- Click the **No** button in the conference confirmation dialog box.
- Close the conference confirmation dialog box.

- Click the **FLASH** button.
- Right-click the appropriate call and select **Drop From Conference**.

Normally, after canceling you will be reconnected automatically to the initial call. If you are not automatically reconnected and want to reconnect to the first call, click the call's *Hold Pending* state cell.

Note: The conference host is the user who initiates the conference call, and only the conference host can drop a call from conference. If the conference host hangs up, no one else in the conference call can drop a call from the conference.

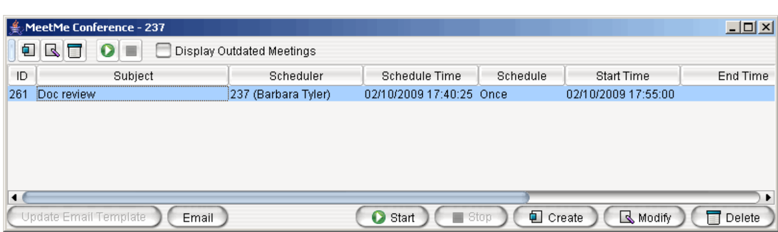
When Conference Participants Are Reduced to Two

The station conference bridge is released when the number of conference participants is reduced to two. The displayed state changes from "Conference" to "Connected" in MaxAgent. The call can then be transferred, parked, or tagged with an account code, and another party with privilege can monitor, barge in, listen to, or coach the call.

MeetMe Conference

If your company has this feature available, you can schedule a phone meeting to take place at a specified time in the future and invite people to the meeting. Invited people call the MeetMe conference extension number to join the meeting at the designated meeting time.

To schedule a phone meeting, click the **Schedule Meeting** button . The MeetMe Conference window opens:



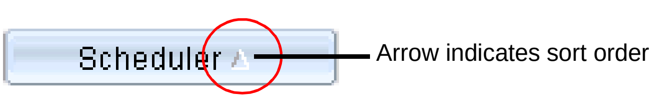
Using this window, you can:

- Create a one-time or recurring meeting and set its parameters
- Open Microsoft Outlook to send an e-mail invitation to participate in the meeting

- Start and stop a meeting
- Modify or delete a meeting
- See meeting ID, subject, scheduler, time, frequency, start time, end time, the last time the meeting started, its status, and the resource being used.
- Display or hide outdated meetings
- Modify column display

Working in the MeetMe Conference Window

- Click a button to perform a function (for example, create a meeting). The buttons at the bottom of the window are labeled with their function; the buttons at the top of the window perform the same functions. In addition, at the top of the window, you can choose to display outdated meetings by checking the **Display Outdated Meetings** check box. Deselect the check box to hide outdated meetings.
- Select an existing meeting to perform a function on it (for example, to start or stop the meeting). You can select one meeting at a time.
- Functions can also be performed on an existing meeting by right-clicking the meeting and selecting from the context menu.
- Click a column heading to sort by that column. An arrow is displayed that indicates the sort order, ascending or descending. Click again to reverse the sort order.



- Use the scroll bar at the bottom of the window to display additional columns, if necessary.
- Change column size by clicking and dragging a column border.
- Change column order in the current window by dragging a column heading to where you want it.
- You can open more than one MeetMe Conference window and work with different meetings and displays in each one. Modifications you make to the *display* in a MeetMe Conference window are not retained after you close the window.

- You can double-click a meeting to open the Modify Meeting dialog box.

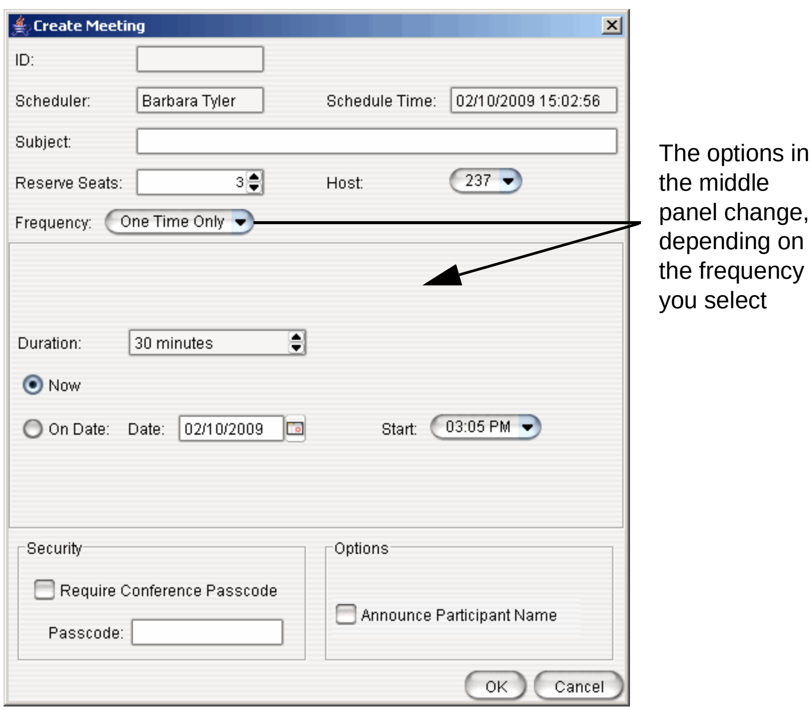
Using the Calendar Button

The Create Meeting and Modify Meeting dialog boxes use Calendar buttons for date selection. To select a date, click the **Calendar** button. When the calendar is open, use the Up/Down arrows to select the year, *or* you can type in a year and then press **Enter**.

Click the **Calendar** button again to close the calendar.

Creating a Meeting

To create a meeting, click one of the **Create** buttons. The Create Meeting dialog box opens.



The following parameters apply to all meetings:

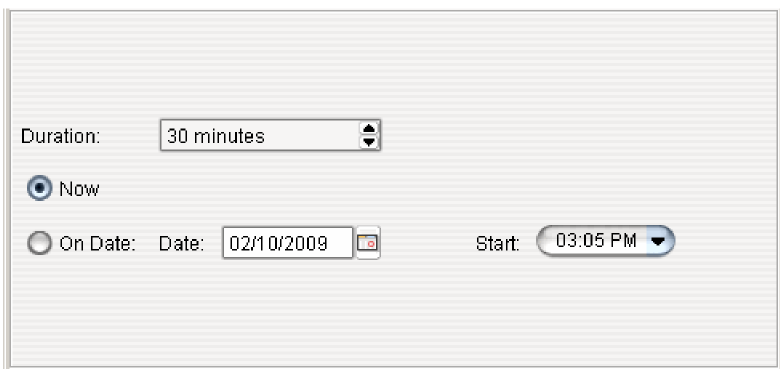
Parameter	Description
ID	The conference ID is created by the system.
Scheduler	The name of the person scheduling the meeting.
Schedule Time	The time the Create Meeting dialog box was opened to create this meeting.
Subject	Identifies the subject or type of meeting. What you enter here should be easily identifiable in the meeting list.
Reserved Seats	Use the Up/Down arrows or type in a number, up to 30, to indicate the number of expected participants. If your company's phone system allows it, you can invite up to 120 participants. If the conference has more than 30 members, by default all the members are muted. The conference host can un-mute up to 30 members concurrently.
Host	Select the extension number of the host of this meeting. The host can start and stop the meeting and can mute and drop meeting members.
Frequency	Select the frequency of this meeting from the drop-down list. A "weekly" or "monthly" meeting can actually be specified as every 2nd week/month or every 3rd week/month, and so on.
Middle panel: Options in the middle panel vary according to the frequency of the meeting. See the sections below this table.	
Require Conference Passcode	If you check this, no one can participate who does not enter the conference passcode that you supply.
Passcode	If you are requiring a passcode, enter it here.
Announce Participant Name	If you want participant names announced when they enter the meeting, check this check box.

Fill in the fields of the Create Meeting dialog box, and click **OK**. See the following sections for directions on filling in the fields in the middle panel of this dialog box.

Note: If other scheduled meetings have already reserved resources for the time period, and sufficient resources are not available for the meeting you are attempting to schedule, a message pops up telling you that there is a resource conflict.

One Time Only Meeting

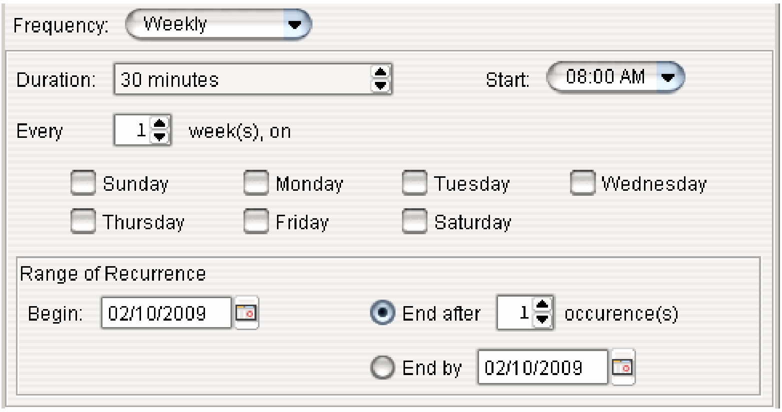
If you select **One Time Only** from the **Frequency** drop-down list, these are your options in the middle panel:



1. Specify the duration of the meeting, using the Up/Down arrows.
2. If the meeting is to begin as soon as it is scheduled, select **Now**.
3. If the meeting is to begin at another time, select **On Date**, and enter a date and start time. To select a date, click the **Calendar** button. To select a start time, click the Down arrow and use the slide bar.

Weekly Meeting

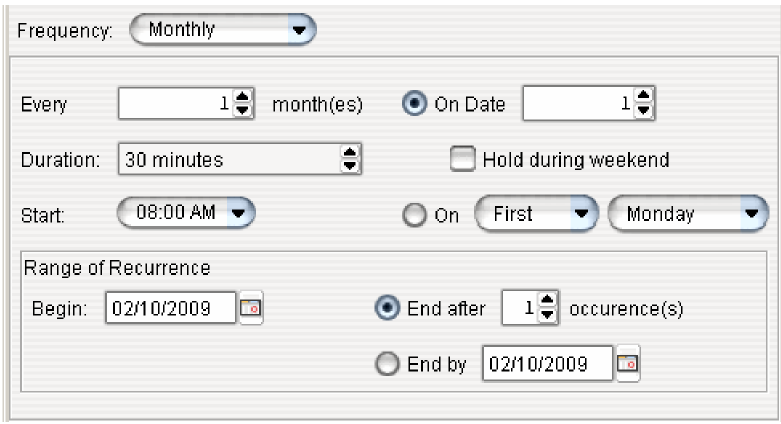
If you select **Weekly** from the **Frequency** drop-down list, these are your options in the middle panel:



1. In the **Duration** field, specify the duration of the meeting, using the Up/Down arrows.
2. In the **Start** field, specify the start of the meeting by clicking the Down arrow and using the slide bar.
3. In the **Every** field, specify how often this meeting is to occur: every week, every other week, every three weeks, and so on.
4. Check the day of the week on which this meeting will occur.
5. In the Range of Recurrence panel, use the **Calendar** button to select a date for the first meeting.
6. Select **End after x occurrences** and choose the number of times the meeting is to occur *or* select **End by** and click the **Calendar** button to specify a date at which the meetings will cease.

Monthly Meeting

If you select **Monthly** from the **Frequency** drop-down list, these are your options in the middle panel:

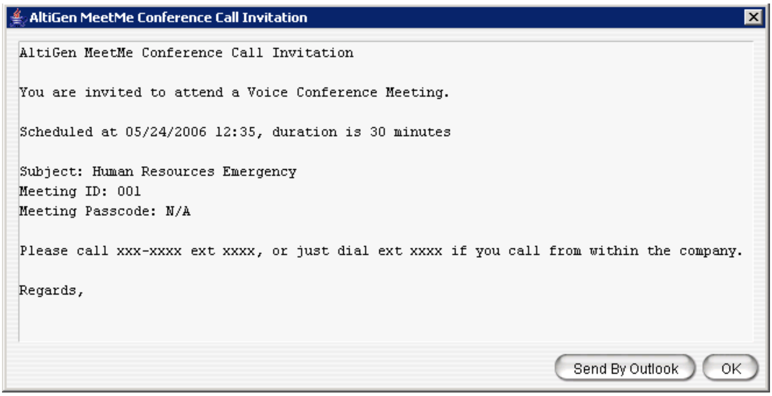


1. In the **Every** field, specify how often this meeting is to occur: every month, every other month, every three months, and so on.
2. In the **Duration** field, specify the duration of the meeting, using the Up/Down arrows.
3. In the **Start** field, specify the start of the meeting by clicking the Down arrow and using the slide bar.
4. Select either **On Date** to specify a day of the month by *number* (for example, the 10th day of the month) or select **On** to specify a day of the month by *name* (for example, the first Monday of the month).
5. If you use **On Date**, the specified date (for example, the 10th day of the month) may sometimes fall on a weekend day. Check the box **Hold during weekend**, if the meeting will be held even on a weekend day.
6. In the Range of Recurrence panel, use the **Calendar** button to select a date for the first meeting.
7. Select **End after x occurences** and choose the number of times the meeting is to occur *or* select **End by** and click the **Calendar** button to specify a date by which the meetings will cease.

E-mailing a Meeting Invitation

In the MeetMe Conference window, click the 

button to see an automatically generated meeting invitation. It will look something like this:



In the Invitation window, you can then click the Send By Outlook button to open Microsoft Outlook. The meeting invitation is pasted into a new message in Outlook, and the Outlook **Subject** field is filled in with "Conference Call Invitation". Choose the people to whom you want to send the invitation, make any edits you may want to make, and click **Send**.

Starting and Stopping a Meeting

The meeting host and the MaxAdministrator ("Admin") can start and stop a meeting.

To start a meeting if you are the host, select the meeting in the MeetMe Conference window and choose **Start**. Once the meeting is "started," the host can log into it (see "Joining a MeetMe Conference" on page 40).

To stop a meeting before its scheduled duration is over, select the meeting and choose **Stop**. Manually stopping a meeting frees up resources. Otherwise, the resources will not be freed until the scheduled meeting duration is over.

What the MeetMe Conference Host Can Do

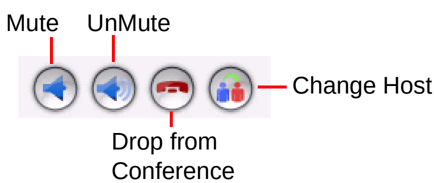
If you are the host of a MeetMe conference, in addition to starting and stopping a meeting, you can:

- Mute other participants

Note: If the conference has more than 30 members, by default all the members are muted. The conference host can un-mute up to 30 members concurrently.

- Drop participants from the conference
- Make someone else the host

To do any of these, either right-click the person's name in the MeetMe window and choose a command from the context menu, or use the buttons at the bottom of the MeetMe tab:



Note: Changing the host does not affect the **Mute** setting for the original host or the new host. If the new host was muted before the transfer of hosting duties, that host will have to **UnMute** himself in order to be heard. Similarly, the original host will still be unmuted if he was unmuted before transferring hosting duties.

Continuing a Meeting Beyond Its Duration Time

When the scheduled meeting time is up, the meeting may continue if no other scheduled meeting needs the resources. If another meeting is scheduled and the resources are needed for that meeting, the current meeting is terminated.

Joining a MeetMe Conference

Users calling from an extension can join a meeting by dialing the MeetMe Conference extension number. Users calling through a trunk must first dial the company number, then the MeetMe extension number.

Users are prompted to dial the meeting ID number. If the meeting has not yet been started, the user hears an appropriate message and can try again later.

If a passcode is required, the user is prompted to enter the passcode.

Recording Calls

The voice recording feature in MaxAgent allows a user to record conversations. Recorded conversations can then be played back through voice mail or accessed at a centralized location.

Note: The voice recording feature is only available to Triton Analog extensions and IP extensions.

WARNING: Listening in to or recording a conversation without the consent of one or both parties may be a violation of local, state and federal privacy laws. It is the responsibility of the users of this feature to assure they are in compliance with all applicable laws.

Recording on Demand

When the system administrator has set your extension to record on demand (to a central location or to your voice mail), you can use MaxAgent to initiate the recording.

To record a call—While connected to a call, click the **Record** 

button, or right-click the call and select **Start Recording** from the context menu. While a call is being recorded, a round red icon appears in the call's **Record** column. If your system administrator has set the **Insert Recording Tone** option for your extension, both parties will hear a beep when the recording begins.

To pause recording—Right-click the call and select **Pause Recording**.

To end recording—Right-click the call and select **Stop Recording**.

To listen to the recording—If the system is set to save the recording as your voice mail, you can hear the recording through the AltiGen Voice Mail System. If the recording is being saved to a centralized location, contact the system administrator for the location.

Note: Do not enter an account code while recording, because doing so will disconnect the call.

Using Account Codes

If your system is set up to use account codes, you can associate calls with specific codes for billing or tracking purposes.

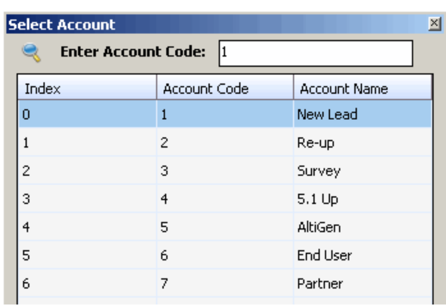
Required account codes—If your extension has been configured to require account codes for all outbound calls, the Account Code dialog box pops up prompting you to enter an account code for each outbound call. The dialog box may or may not contain a list of account codes, depending on how the administrator has configured your extension. After entering the code, click **OK**.

If your extension configuration allows you to override the account code requirement, you can either enter an account code in the field at the bottom of the dialog box or enter **#** to bypass the account code altogether.

Optional account codes—You may enter an account code without being prompted.

To associate a call in progress with an account code—Click the 

Account button, or right-click the number, and choose **Account Code** from the menu. The Account Code dialog box pops up:



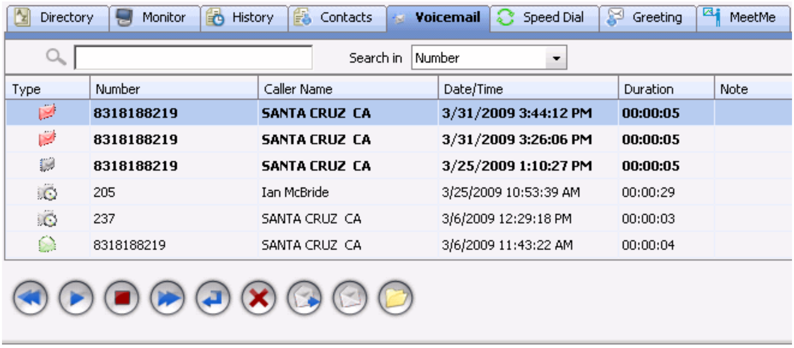
8. In the Account Code dialog box, select an account code if a list is displayed, and click **OK**. If a list is not displayed, enter an account code in the **Enter Account Code** field and click **OK**.

   Note: Do not enter an account code while recording; doing so will disconnect the call.

To change the account code for a call in progress, repeat the steps above, entering the new account code to assign the call to.

Checking Voice Mail

Click the **Voicemail** tab in the main window to see a list of your personal voice mail messages. Clicking Voicemail (2) in the status bar also displays the **Voicemail** tab. If your workgroup is configured to see the workgroup's voice mail, click the **WG Voicemail** tab to check the workgroup voice mail.



- New voice mail messages are indicated by a white, closed envelope and bold type.
- Heard voice mail messages are indicated by a white, open envelope.
- New messages marked urgent are indicated by a red, closed envelope. When you have a message marked urgent, the MaxAgent icon in the Windows tray and in the MaxAgent title bar becomes a red envelope, and the **Voicemail** indicator in the status bar bears a red circle.
- If the message is saved, the envelope looks like this: .
- A paperclip symbol on the envelope indicates an attachment—a voice mail message forwarded from another extension.

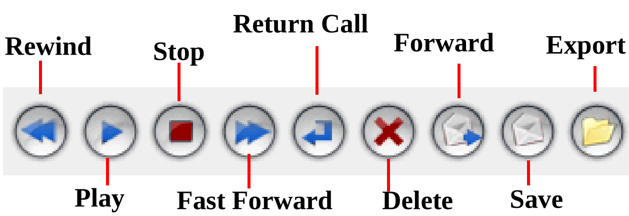
Dealing with Voice Mail

Select the message and use the voice mail command buttons at the bottom of the **Voicemail** tab, as shown in the figure below. You can also access these commands by right-clicking a voice mail and selecting a command from the context menu.

Listening options are configurable, as described in “General Information” on page 52. You can listen using the sound card on your PC or your phone. If you’re not using IPTalk, you can play voice mail to a sound card while your phone is in the connect state. (You cannot do this if you’re using IPTalk.)

When you listen to a new message, the envelope icon changes from closed to open, indicating that the message has been heard, and the type font changes from bold to regular. Also, when you play a voicemail, MaxAgent shows *Play VM* in the Call Control panel, and shows the play duration . (The duration does not reflect fast forwarding or fast rewinding.)

Use the voice mail command buttons to perform the following functions:



If you click another message in the list, the current message stops playing.

Save at Remote Server or Export Locally

You can save a message as a .wav file that you can play back later. To do so, select the message and click either the **Save** button or the **Export** button (or right-click the message and choose **Save** or **Export**).

- **Save** saves the message automatically on a remote server in a location designated by the system administrator. No file saving dialog box opens.
- **Export** opens a file saving dialog box that lets you name the .wav file and choose a directory in which to store it. You can then play the .wav file on a media player.

Deleting Messages

To delete a selected message, click the **Delete** button, or right-click a message and select **Delete** from the context menu.

Returning a Call

To return the call, select the voice mail and click the **Return** button or click the number in the **Number** field.

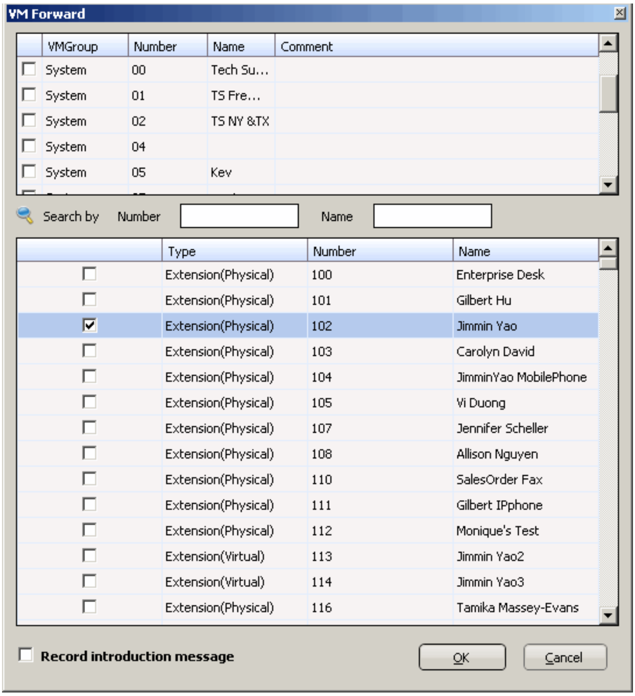
Attaching a Note

To add a note to accompany a voice mail, double-click in the **Note** field and type your note. Or right-click a voice mail entry and choose **Note** from the pop-up menu. Type your note and click **OK**.

Forwarding Voice Mail

To forward a voice mail to an extension or a VM Group

1. Select the voice mail and click the **Forward** button, or right-click the voice mail and select **Forward**. The VM Forward dialog box opens:



2. Check the check box next to the group and/or extension to which you want to forward the message.

If you need to search for a person by extension or name, type the first letters of the number/name into the **Search by Number** or **Name** box. The matching extension or name displays in the list as you type.

Notes:

- Click on the column headings to sort the data.
- If the extension name is configured for an extension, it is used to match the search string. If the extension name is not configured, then the extension number is used to match the search string for this extension.

3. Optionally, you can leave an introductory message. Select the **Record Introductory Message** check box and follow the steps below.
4. Click **OK** to complete the forwarding.

To record an introductory message:

1. If you select the **Record Introductory Message** check box, then when you click OK to complete the forward, pick up the phone hand set and you'll hear a prompt to record the message.
2. Record the message and press the pound key (#). A confirmation appears on screen.
3. Click **OK** to confirm and complete the action.

Note: You can set up voice mail (VM) groups (distribution lists) to forward messages to multiple recipients at the same time. See "Working with Voice Mail Groups (Distribution Lists)" on page 64.

Monitoring the Activity of Other Extensions/ Workgroups

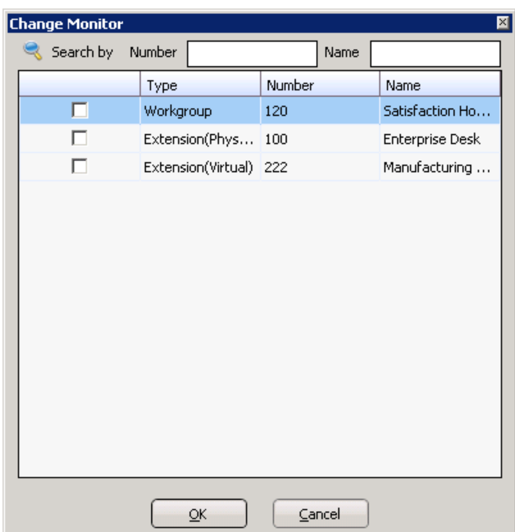
If your system administrator has configured your extension for monitoring, you can monitor the activity on the other extensions in your workgroup, view call history, view workgroup statistics, and view calls in queue.

If you're a manager, for example, you might monitor to determine whether you need more resources in a busy environment. Or you might use monitoring capability to cover calls for a co-worker, since you can click the ringing phone icon in the monitor list and take the co-worker's call.

Choosing Workgroups to Monitor

To choose workgroups to monitor:

1. Click the **Monitor** tab, and click the  Monitor button at the bottom of the Monitor page.
   The Change Monitor dialog box opens. Extensions/workgroups to which your system administrator has given you monitoring rights are listed here.



2. Select the check boxes next to the extensions/workgroups you want to monitor, and click **OK**. If the list is long and you want to search, type a number or name in the appropriate search box.

   The extensions you select will be listed in the Monitor window.

Reading the Monitor List

The monitor window includes these fields: **State, Extension**, **Name**, **Activity**, **DND/FWD**, **Caller Name**, **Number**, **Department**, **Location**, **DNIS**, and **Duration**.

The state can be one of the following:

- **Idle**—the extension is not in use
- **Connected**—the extension is in use
- **Ringing**—the phone on the extension is ringing; you can click the **State** field to pick up the call at your own extension
- **Conferencing**—the extension is on a conference call
- **Voicemail**—the extension is in voice mail
- **Auto Attendant**—the extension is connected to an auto attendant
- **Holding**—the extension is on hold
- **Hold Pending**—the extension is on hold, and an action is pending
- **Virtual Extension**

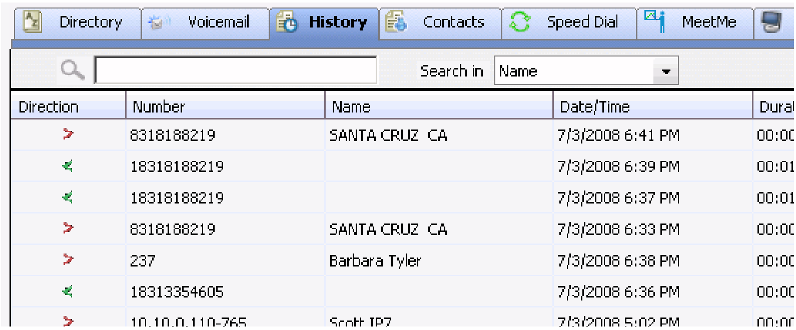
Calling or Picking Up Calls

If a monitored extension is *Idle* (green dot) you can click its **Extension** field to ring the extension.

If a monitored extension is *Ringing* (red dot), you can click its **State** field to pick up the call.

Viewing the Call History

Click the **History** tab to view data about handled calls.



Note: Click on the column headings to sort the data.

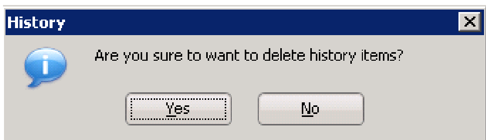
The **History** tab displays the following fields:

- **Direction**—indicates if the call is incoming or outgoing, or was a missed call. *Left-pointing green arrow* indicates outgoing call; *right-pointing red arrow* indicates incoming call. Right-pointing arrow with exclamation point indicates a missed call.
- **Number**—the extension or phone number on the other end of the call. Click a number in the **Number** column to dial that number.
- **Name**—Caller ID information, if available.
- **Date/Time**—the date and time of the call.

  When you sort on Date/Time, the calls are sorted by last disconnected and not in the order the call was received. It is therefore possible to have a record with an earlier timestamp followed by a record with a later timestamp.

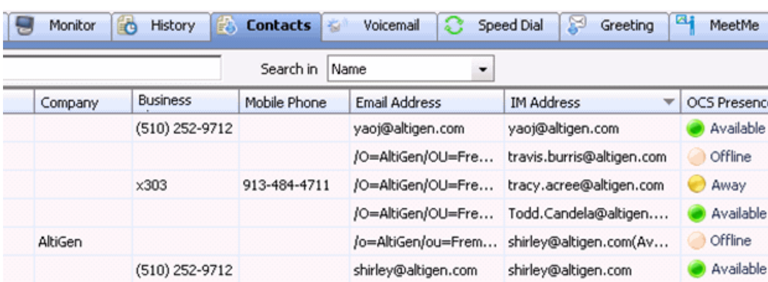
  Also, the timestamp for call data is based on the client system, while the timestamp for voice mail messages is from MAX Communication Server. Thus, the times displayed here may not match those in the voice mail view in the main window.
- **Duration**—the duration of the call.
- **DNIS**—DNIS digits collected, if available
- **Group**—Group number or name
- **Note**—a note attached to the call. If you entered a note in the **User Data** field of the active call, that note appears here. You can also enter a note on the **History** tab by double-clicking the **Note** field and typing your note.

Use the **Delete** button to delete selected calls in the history list. Use the **Delete All** button to delete the entire call history list. MaxAgent will ask you to confirm the deletion; click **Yes** to delete or **No** to cancel:



Adding Your Contacts to MaxAgent

To populate the **Contacts** tab with the contacts listed in your Outlook, Outlook Express, ACT!, or Goldmine CRM application, see “CRM Integration” on page 62. Once the list is populated, the numbers that appear on this tab can be called, transferred to, and conferenced just like any other number.



E-mail a contact—Click a contact’s e-mail address to open Microsoft Outlook, where you can send an e-mail to the contact.

Send an instant message—If you have configured Enable OCS Client in the MaxAgent Configuration window, click on a contact’s IM address or OCS presence field to initiate instant messaging with that contact. You need to have OCS client installed to use this feature.

Checking Workgroup Status

Click the **WG Status** tab to view the real-time status of each workgroup you’re a member of.

WG Status | Voicemail | WG Queue | Contacts | Greeting | Performance | History | Directory

Number	Name	Login/Out	CIQ	CIQ > SLT	Longest QT	New VM	Logged in	Busy	Unavaliable	Exceed Threshold
515	BT Group	Login	0	0	00:00:00	4	1	0	0	100
171	CRM Demo2	Login	0	0	00:00:00	1	2	0	0	100
129	eng ip page g...	Login	0	0	00:00:00	0	4	0	0	100

Information includes: the workgroup number, the workgroup name, whether you are logged in or logged out, the number of calls in queue, the calls in queue greater than the service level, the longest queue time, new voice mails, the number of agents logged in to each group, total agents busy, total agents not available, and % of calls that exceed threshold.

Viewing Your Workgroup Performance

Click the **Performance** tab to view statistics on your workgroup calls and direct calls. The data is collected from midnight.

WG Status | Performance | WG Queue | Contacts | Voicemail

Agent's Performance since Midnight	Total	Direct Call	BT Group	eng ip page grp	CRM I
Last Logged In Time	-	-	11/20/2008 12:11:44 PM	-	11/18,
Last Logged Out Time	-	-	-	11/18/2008 1:28:31 PM	-
Total Logged In Time	-	-	16:34:00	-	16:34
Total Not-Ready Time(Apply to all WG)	00:00:00	-	-	-	-
Total DND/FWD Time(Apply to all WG)	00:06:16	-	-	-	-
Total Inbound Calls Answered	5	0	5	0	0
Total Talk Time	00:24:58	00:00:00	00:24:58	00:00:00	00:00
Average Talk Time	00:04:59	00:00:00	00:04:59	00:00:00	00:00
Total Connected Outbound Calls	1	0	1	0	0
Total Talk Time	00:00:22	00:00:00	00:00:22	00:00:00	00:00
Average Talk Time	00:00:22	00:00:00	00:00:22	00:00:00	00:00
Total Number of Wrap-up	7	-	7	0	0
Total Wrap-up Time	00:01:10	-	00:01:10	00:00:00	00:00
Average Wrap-up Time	00:00:10	-	00:00:10	00:00:00	00:00
Total Number of Calls On Hold	2	0	2	0	0
Total Hold Time	00:01:33	00:00:00	00:01:33	00:00:00	00:00
Average Hold Time	00:00:46	00:00:00	00:00:46	00:00:00	00:00

Export Print

If you have been removed from a workgroup by the system administrator, all your statistics related to that workgroup will also be removed from the **Performance** tab. The statistics on this tab are cleared if the system is reset.

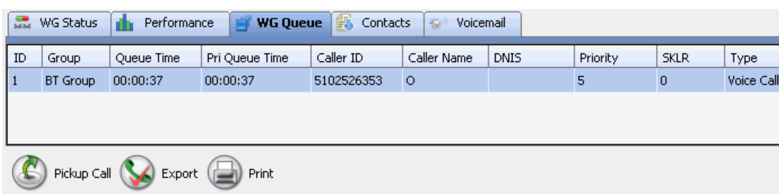
Much of the data reported here is also reported in the Supervisor's view of group statistics and is further discussed in "Viewing Group Statistics" in the *MaxSupervisor Manual*.

Click the **Export** button to export the statistics as a .csv (comma-separated values) file.

Click the **Print** button to print the statistics.

Viewing Queues

Click the **WG Queue** tab to view the calls in queue for the monitored workgroups. You can export the data to a .csv file (click the **Export** button), and you can print the data as a WG Queue Report (click the **Print** button).



These are the fields on the WG Queue tab:

- **ID**—Call ID in the queue of one workgroup. The ID is unique within a workgroup, but may be repeated in all workgroups.
- **Group**—Workgroup name or workgroup number
- **Queue Time**—Duration of the call in queue
- **Priority Queue Time**—Duration the call has been in queue at the current priority level. Priority queue time is reset to 0 when the call's priority is promoted to a higher level.
- **Caller ID**, **Caller Name** (if available), **DNIS**
- **Priority**—The priority level assigned to the call
- **SKLR**—Skill level required
- **Type**—Queue call type

Pick Up Calls from Queue

To pick up a call from a workgroup queue, click on the queued call and click the **Pickup Call** button. If you are connected to a caller, the current call will be put on hold and the queued call is connected.

Note: This feature must first be enabled by the system administrator.

Using ActiveX Control with Third Party Applications

The MaxAgent ActiveX Control Object is an ActiveX Object. It works with MaxAgent by getting call-related information from MaxAgent, which acts as a server. Based on the call information, MaxAgent will implement corresponding actions, such as popping up corresponding customer information and logging Caller ID into a database. For more information on using ActiveX with MaxAgent, refer to the "MaxAgent ActiveX Programmer's Guide" available from AltiGen's web site (www.altigen.com, under **Customers > Product Manuals > 6.0 Manuals**).

Configuring Your MaxAgent

Using the MaxAgent Configuration window, you can configure the following behaviors and options:

- **General Info**—password, default trunk access, and other general settings.
- **Call Handling**—forwarding, busy call, and no-answer call handling; call waiting; number of rings before forwarding; automatic answering.
- **One Number Access (ONA)**—forwarding of specific incoming calls.
- **Message Notification**—how and when you want to be notified about incoming voice messages.
- **Call Alerts**—screen pops and audio beeps.
- **Playing voicemail**—through handset or soundcard.
- **Integration**—integrating with a supported CRM.
- **Display Customization**—tab layout and theme selection.
- **IPTalk**—IPTalk settings.
- **Log**—enabling a log to be created for IPTalk and for this application (MaxAgent) to trace errors

Note: Some options may not be available to you.

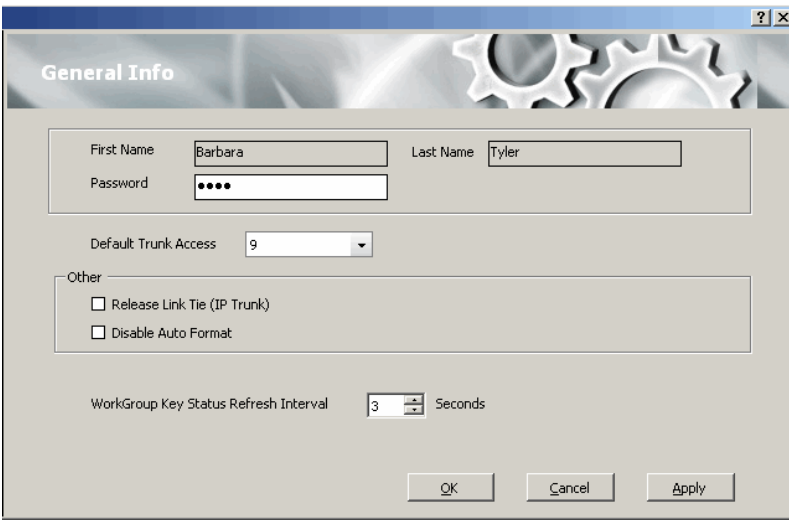
Click the button in the upper right of the MaxAgent main window to configure these options.

In the Configuration window, click **Apply** or **OK** to save your changes:

- **Apply** saves your changes and lets you continue in the Configuration window.
- **OK** saves your changes and closes the Configuration window.

General Information

The **General Info** screen lets you edit your password and the default trunk access code, release the link tie for IP trunks, disable auto format, and set the refresh interval on workgroup status.



Default Trunk Access

The trunk access codes are defined by the system administrator. When you get an incoming call over multiple trunks and cannot issue a return call, the system will automatically select the default trunk access code to place your call.

Other General Options

You can configure three other general options:

- **Release Link Tie (IP Trunk)**—When checked, clicking the **Transfer** button will automatically send “FLASH *” to release a tie trunk if the incoming call is through an IP trunk. (Option is disabled by default.)

  IMPORTANT! Before checking this check box, see your phone system administrator. If your company is using multiple systems and the tie trunk feature, the administrator **needs to have used Enterprise**

Manager to synchronize the systems. Otherwise this feature *will not work*.

Note: The call being transferred must originate from an AltiGen PBX system running AltiWare ACC/ACM 5.0 or later, or MAXCS ACC/ACM 6.0 or later.

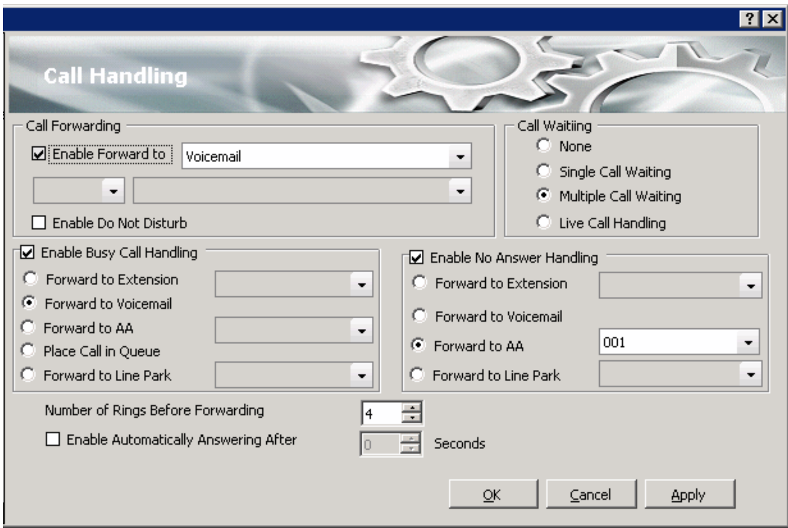
- **Disable Auto Format**—If the MAX Communication Server's country code is US/Canada, MaxAgent automatically adds the long distance/ international dialing prefix (corresponding to the server's country code) when returning a call from voice mail or when making a call from the **History** tab. If this is not right for your situation, check **Disable Auto Format**.

  If the MAXCS server's country code is not USA/Canada, MaxAgent displays the check box **Insert long distance/international dialing prefix**. When checked, MaxAgent will add the long distance/ international dialing prefix (corresponding to the server's country code) when returning a call from voice mail, or when making a call from call history. If the MAXCS server's country code is USA/ Canada, this check box is not displayed.

- **Workgroup Key Status Refresh Interval**—When MaxAgent is shrunk to a strip at the top or bottom of the screen, number of calls in queue and longest queue time are shown, along with the name and number of the workgroup with which they are affiliated. Specify here how often you want this data refreshed.

Call Handling

Click the **Call Handling** tab in the Config window to configure incoming call handling for your extension.



Forwarding All Calls

When you configure your MaxAgent to forward all calls, the information is displayed in the status bar. For example if you choose to forward all calls to an auto attendant, FWD AA is displayed in the status bar.

Forwarding calls to an external number is not allowed in MaxAgent.

Do Not Disturb

If you check **Enable Do Not Disturb**, all incoming calls are forwarded according to your **Enable Busy Call Handling** settings, described below.

Checking **Enable Do Not Disturb** here has the same effect as clicking the **DND** button in the MaxAgent main window.

Busy Call Handling and No Answer Handling

You can use these options to specify how you want to handle incoming calls when you're already on the phone or when you can't answer the phone, for example, when you've checked **Enable Do Not Disturb**.

If you want to use the auto attendant and you don't know the number of the phrase or menu you want to use, check with your system administrator.

Place call in queue is available only if your system administrator has enabled queuing for you.

Number of Rings Before Forwarding

The **Number of Rings Before Forwarding** setting pertains to almost all the options on this screen. It is the number of times the phone rings before the system forwards the call to an extension, voice mail, or the auto attendant.

To have MaxAgent automatically pick up the call, check the **Enable Automatic Answering after x Seconds** check box and use the arrow keys to choose the number of seconds.

Note: The default setting is 0 seconds. If the duration is set to 0, all incoming calls will go to connect state right away. Neither caller nor callee will hear a ring tone.

Call Waiting Options

Call waiting options are available only if the **Enable Busy Call Handling** check box has been checked, but this option is available *only for non-workgroup calls*.

- **Single Call Waiting**—sets up single call waiting. This feature gives an alert tone (audio beep) to indicate that a call is waiting. **Single Call Waiting** must be selected in order to conference incoming calls.
- **Multiple Call Waiting**—enables a "non-workgroup queue" of multiple calls waiting. You must also select the **Place Call In Queue** option under **Enable Busy Call Handling** to enable this option. This allows you to transfer or park the current call before picking up the next call in queue.
- **Live Call Handling**—when enabled, allows a caller to hear a ringback tone when the called party is in voice mail, paging, transfer, or conference state.

One Number Access (ONA)

If you are expecting calls that you want to receive regardless of where you are, you can have the system forward those calls to you. You must specify the Caller IDs for the calls you want forwarded, and the numbers where you can be reached.

If the system is unable to connect the call (can't identify a Caller ID or can't reach you at *any* of the numbers you specify), the call is sent to your voice mail.

When you answer an ONA call, you may be required to enter your extension password, depending on the configuration for your extension set by your system administrator

Before You Set Up ONA

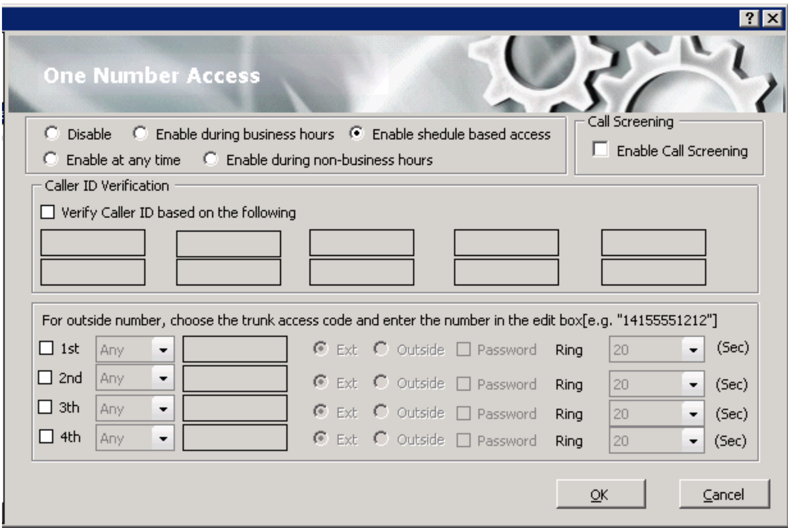
- ONA must be enabled for your extension by your system administrator.
- The settings on your MaxAgent **Call Handling** tab must not conflict with ONA. Specifically:
  - — **Enable Do Not Disturb** must not be checked. If it is, when your line is busy, all calls will go into voice mail and not to the ONA forwarding numbers you specify.
  - — **Enable Forward to** must not be checked. If it is, all calls will be forwarded according to this setting.

  See “Call Handling” on page 57 for details on these settings.

Setting Up One Number Access

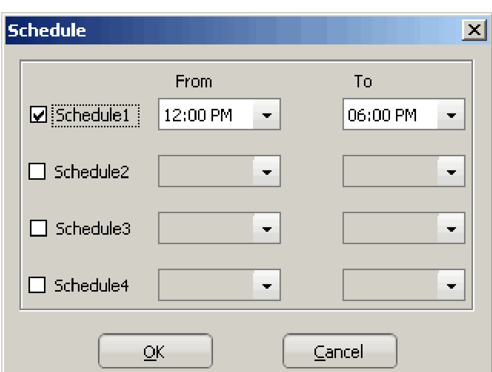
To set up one number access,

1. Click **Extension > One Number Access** in the Configuration window.



2. Select the times you want to be available to ONA callers.

   If you choose **Enable schedule based access,** you can set up to four different schedules in the dialog box that pops up:



Check a Schedule box and choose the times you want to be available for ONA from the drop-down lists.

3. Check the **Enable Call Screening** check box if you want the system to prompt the ONA caller to record a caller name to continue ONA.

4. If you want, check the **Verify Caller ID based on the following** check box and then specify the incoming phone numbers for ONA. If ONA

finds one of these numbers on an incoming call, it will forward the call to you.

You can enter up to 10 phone numbers in the **Caller ID Verification** fields. For local numbers, use 7 digits (5555555). For long distance numbers, use 10 digits—area code + local number.

Note: If you enter no numbers in the Caller ID Verification fields and ONA is enabled, ONA is made available to every caller.

Using a Password

You can use a Caller ID Verification field to enter a password number such as “5555” so that a caller who knows this password can use ONA to find you, regardless of where they are calling from. Tell the caller to dial **1** during your personal greeting and then enter the password.

5. Enter the **Forwarding Numbers** to be used by the system to find you when ONA is active. You can set up to four different numbers—extensions or outside numbers. For outside numbers, use the drop-down list to select the trunk access code you want to use. Specify whether the number is an extension or outside number and if a password is required.

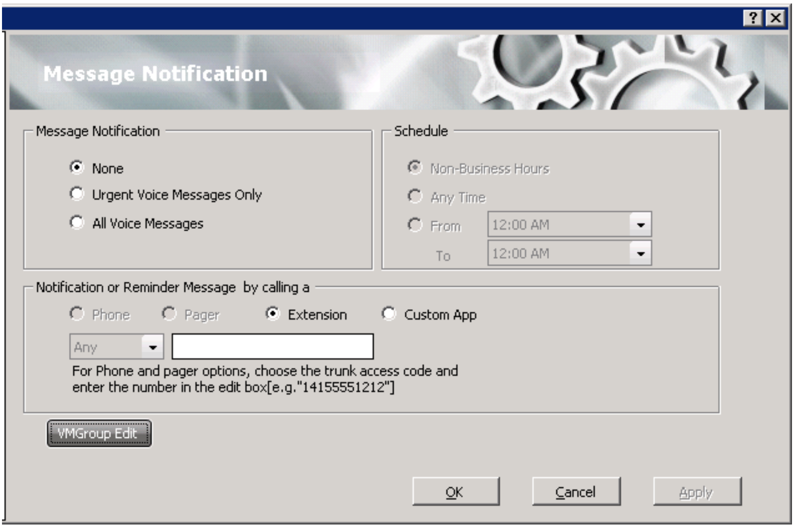
   When ONA is active, the system dials the forwarding number(s) in the order from Forwarding Number 1 through Forwarding Number 4. Note that this number order does *not* correspond to the Schedule order—for example, Forwarding Number 2 is *not* used first during Schedule Number 2.

Note: If your system administrator has *not* configured your extension to require you to enter your extension password when answering an ONA call, then a call forwarded via ONA that is picked up by a voice mail box, fax machine, or answering machine will connect, and will not try any subsequent Forwarding Numbers. Therefore, if you want ONA to use such an option as a last resort, it should be Forwarding Number 4.

You can set the **ONA ring duration** from 5 to 45 seconds using the **Ring** drop-down lists. Default value is 20 seconds. The system will ring the ONA target during the specified time limit. If the ring time exceeds 30 seconds, the system will play a phrase every 15 seconds (playing time is included in ring time).

Message Notification

You can specify how and when you'd like to be alerted to new messages when you're away from your desk. Click **Extension > Message Notification** in the Configuration window to display the Message Notification configuration screen.



You can set these notification options:

- **The types of messages** about which you want to be alerted: none, urgent voice messages only, or all voice messages.
- **Schedule**—Select during what hours you want to be alerted.
- **How and where to notify you**—Select an option in the **Notification or Reminder Message by calling** section. If you want to use an outside number, use the drop-down list to select the trunk access code, and then type in the number.
- **Voice Mail Groups**—You can set up and edit voice mail groups.

Note: You can also configure Message Notification through the AltiGen Voice Mail System.

Working with Voice Mail Groups (Distribution Lists)

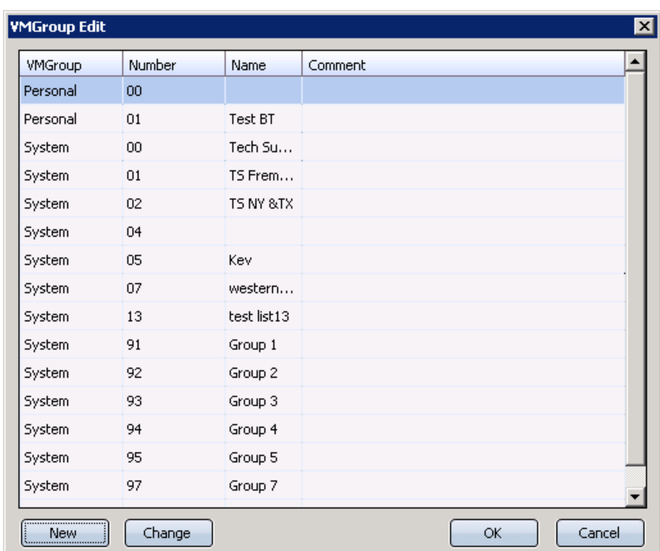
You can set up voice mail groups (distribution lists) to forward messages to multiple recipients at the same time. You can set up to 100 personal voice mail (VM) groups, each with 64 members. Group members can be any extension or another voice mail group.

There are two types of voice mail groups you can use:

- **System-based groups** are set up by the system administrator. You can use but not edit these lists in MaxAgent. You can, however, add a comment that is displayed in your MaxAgent.
- **Personal groups** can be set up and modified in MaxAgent or in your AltiGen Voice Mail System.

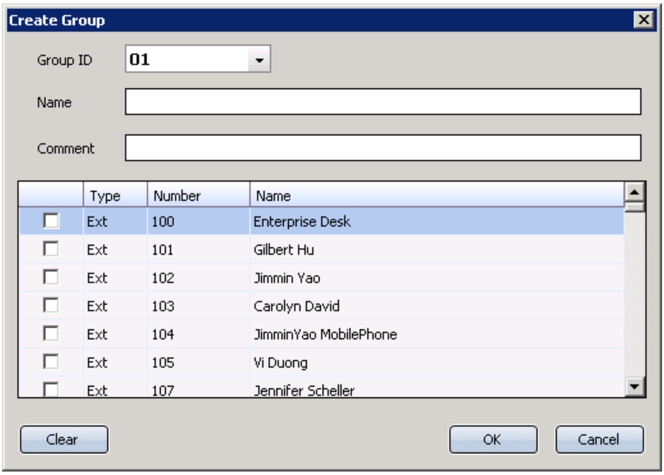
Working on Voice Mail Group Lists

To work on your personal voice mail groups, on the Message Notification page, click the **VMGroup Edit** button. The following dialog box appears:



To create a personal voice mail group

1. Click the **New** button in the**VM Group Edit** dialog box. The **Create Group** dialog box opens.



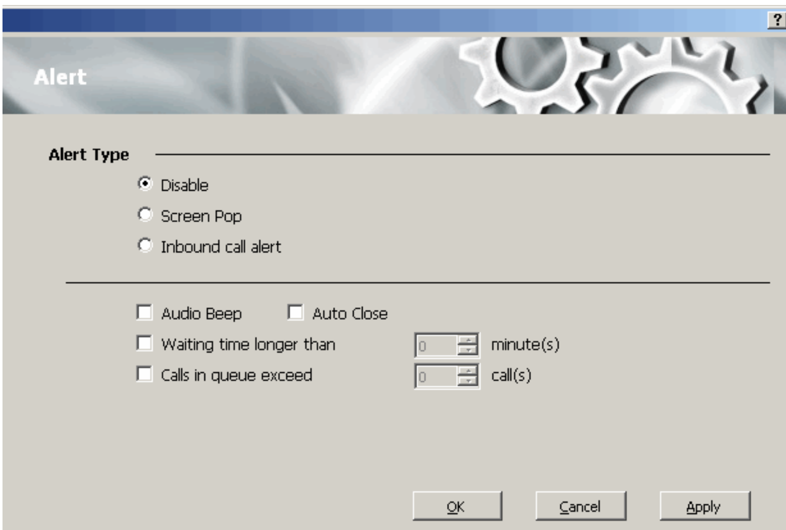
2. Click the drop-down list to select a **Group ID**.
3. Enter the VM Group **Name** and any **Comments**. These are optional but will help you identify the group.
4. Select the member extensions by selecting the check box next to each extension.
5. When finished, click **OK**. Click the **Clear** button to deselect all extensions or click **Cancel** to exit without saving your edits.

To change a personal voice mail group

1. Click the **VM Group Edit** button. The VM Group Edit dialog box opens.
2. Select the group you want to change, and click the **Change** button.
3. Make any changes you need to make for the group name, comments, or members. To add or remove a member, select or deselect the check box next to the extension.
4. Click **OK**.

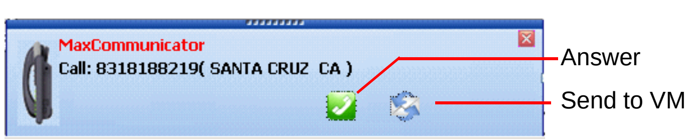
Call Alert Options

If you want MaxAgent to inform you when you have a call, specify your desired method(s) in the Configuration window's **Options** > **Alert** screen.



You can set these alert options:

- **Disable**—Disable screen pop.
- **Screen Pop**—When a new call comes in while MaxAgent is minimized on the taskbar, the MaxAgent main window pops up. You can then answer the call or perform other MaxAgent actions. For MaxAgent to pop up, you cannot have closed the application entirely.
- **Inbound call alert**—When a new call comes in, a window pops up and gives you the option to answer the call or send it to voice mail:

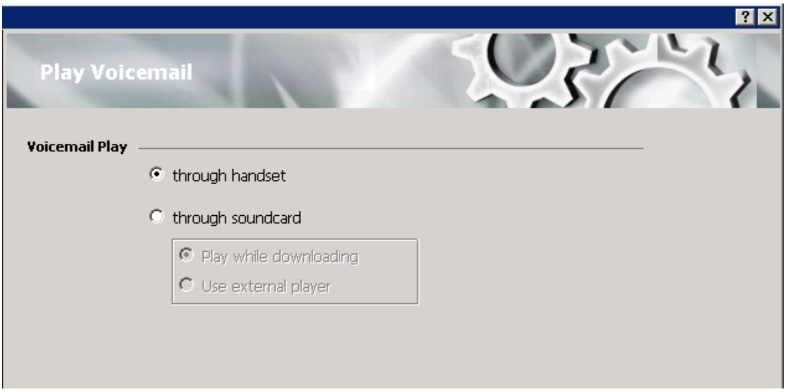


- **Audio Beep**—Your PC beeps you when you have a call.
- **Auto Close**—The pop up window closes once you have finished with the call.

- **Waiting time longer than**—A message window pops up when a call has been waiting in queue longer than the time you specify here. You must close the window manually.
- **Calls in queue exceed**—A message window pops up when the number of calls in queue exceeds the number you specify here. You must close the window manually. The window shows the “exceeds” alert only when the threshold is first crossed. For example, if you have configured your MaxAgent to show the alert when calls in queue (CIQ) exceeds 3, the window will pop up only when CIQ changes from 3 to 4; it will not pop up again when CIQ changes from 4 to 5 or more.

Voice Mail Play Options

Choose **Options > Play Voicemail** in the Configuration screen to set voice mail play options.



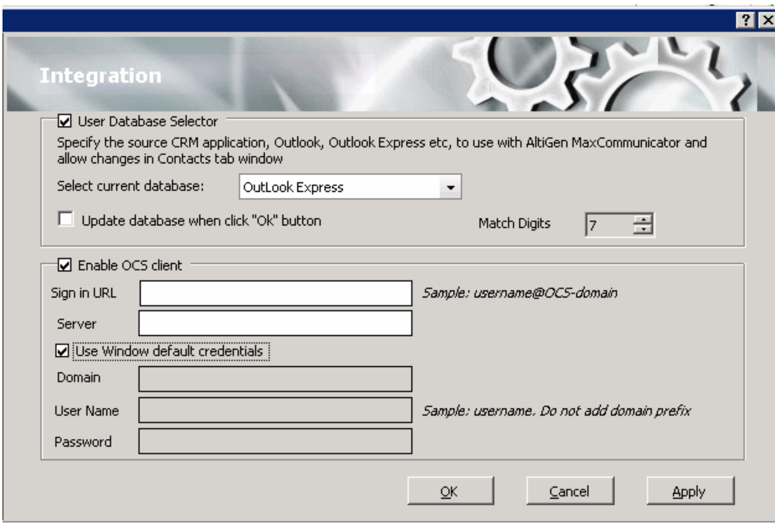
You can choose to play your messages on your phone set, or play them on your sound card and speakers. If you choose to play them on your sound card, you can have the message play as it downloads, or you can download it completely and play it on an external media player.

CRM Integration

MaxAgent can access phone numbers from your Microsoft Outlook, Outlook Express, ACT!, or GoldMine® database. During installation, the install program reads which applications you have installed on your PC.

You can also integrate MaxAgent with your Microsoft Office Communications Server (OCS) account for instant messages. The OCS contacts can be imported from Microsoft Outlook client.

Configure CRM integration in the Configuration window's **Integration** screen:



Use Database Selector—Check this check box to allow integration of your company's CRM database with your MaxAgent, then select your CRM program from the **Select current database** drop-down list.

Update database when click "OK" button—When you check this check box, MAX Communication Server refreshes the data MaxAgent accesses from the database.

Note: If you select Outlook, MAX Communication Server will load all the subfolders and data in your main Contacts folder, which will take a few moments. Once the data is loaded, you can close the Configuration window, reopen it, and click the **Select Folder** button that now appears to choose which Contacts subfolders you want to use.

Match Digits—Select the number of digits to match for caller ID. Matching starts from right and moves left. This option is for calls that go through IP and for international calls that have a digit prepended, like 0. For example, if you choose 7 (the default) in the Match Digits field, and the number is 10.10.10.6- 915102529712, MaxAgent would match the last 7 digits, or 2529712, to identify the caller for you.

Enable OCS Client—Check this box to enable the Microsoft OCS client, which allows you to initiate instant messaging from MaxAgent.

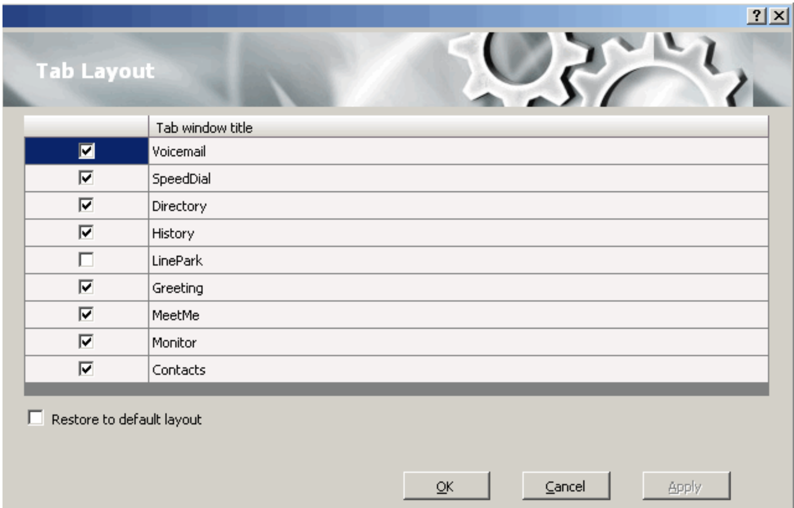
- **Sign in URL**—The URL of the Microsoft OCS client
- **Server**—The IP address of the Microsoft OCS client

Use Windows default credentials—Either check this check box to use Windows default credentials, or enter the OCS domain, account name, and account password in the appropriate fields.

Note: The OCS needs to be in the same domain as MAXCS.

Tab Layout

You can choose which tabs you want to display in MaxAgent by right-clicking in the space to the right of the tabs in the main window and selecting the tabs you want to show. When no tabs are displayed in the main window, you can click **Voicemail** (which displays the **Voicemail** tab). Or you can configure the tabs in the Configuration window's **Customization > Tab Layout** screen.

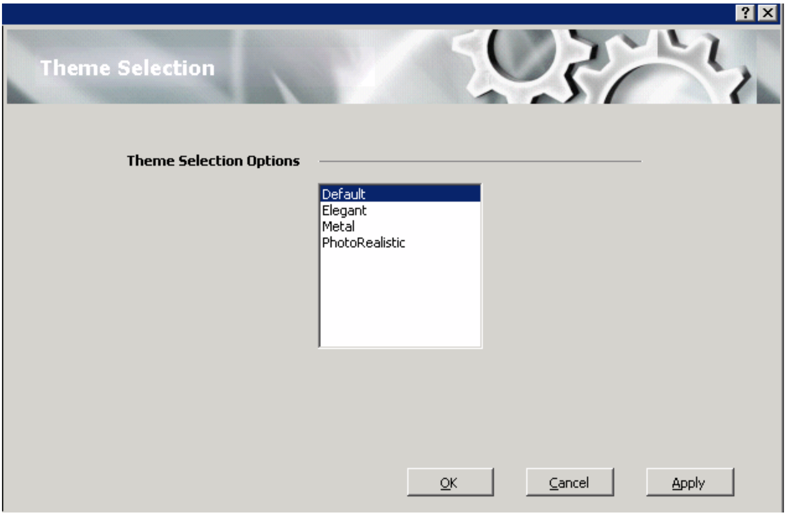


Check the tabs you want to display in MaxAgent, and click **OK**.

To restore all *call control buttons*, *tabs*, and *application window sizes* to the default settings, check **Restore to default layout**, and click **OK**.

Theme Selection

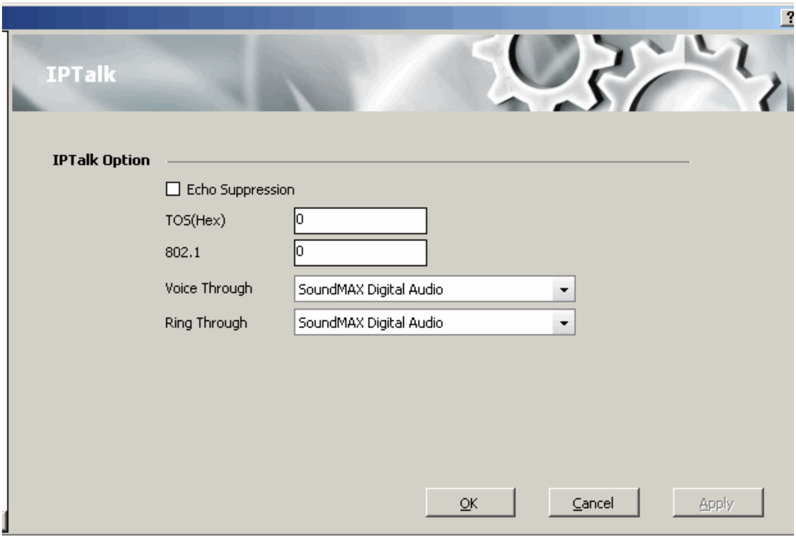
Choose the display theme of your MaxAgent in the Configuration window's **Customization > Theme Selection** screen.



Select a theme and click **Apply** to see the change, or click **OK** to accept the theme. The theme changes without restarting MaxAgent.

IPTalk

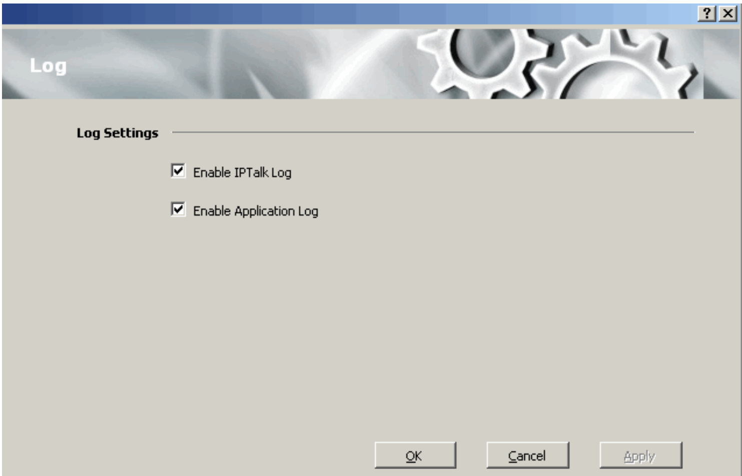
If you're using IPTalk, set the options in the **IPTalk** configuration screen:



- **Echo Suppression**—Check this check box if you are experiencing echo.
- **ToS(Hex)**—The ToS byte indicates the type of service. For IPTalk, you need high priority service, and the default of "0" set here indicates high priority service. However, if your company router supports DSCP EF, then set this field to "A0". The ToS value is gateway-based. For guidance, see your system administrator.
- **802.1**—This setting is related to the priority given to voice packets traversing your network. For guidance on setting this value, see your system administrator.
- From the **Voice Through** drop-down list, choose the sound card that will carry the incoming and outgoing voice. It could be a sound card in your PC, or it could be a USB-based sound card in your headset system.
- From the **Ring Through** drop-down list, choose the device that will carry the incoming ring. When you're away from your desk, you may prefer the ring to come through your PC speakers, rather than your headset system.

Log

If you want the system to keep error logs for troubleshooting, check the appropriate box in the **Log** screen in the Configuration window. Logs are stored in your \\Documents and Settings*username*\Local Settings\Application Data\AltiGen\MaxAgent folder.



The **Enable IPTalk Log** check box is available only if you're using IPTalk. The Application log is for MaxAgent.

Errors and Troubleshooting

The following errors may be displayed as login or connectivity errors.

Error Message	Description	Solution
AltiServ or MAXCS connection limit has been exceeded.	No MaxAgent was found OR more than allowed number of MaxAgent users have attempted to log on.	Maintain the number of MaxAgent license keys or add additional session licensing.
Cannot connect to AltiLink. Please check server name or network connection.	You are not connected to MAX Communication Server.	Check the server field (IP address or DNS name) by: 1. Pinging the network server address OR 2. Try using the IP address of MAX Communication Server (if using the DNS name in the server field).
Cannot access voice mail list while mail box in use.	Mail box is in use by the AltiGen Voice Mail System and is temporarily unavailable.	Wait awhile, then try again.
Mail service is unavailable. Please check with your administrator.	Voice mail service is not enabled on MAX Communication Server.	Make sure voice mail service is started.
Please register AlpInterface.dll (regsver32 AlpInterface.dll).	MaxAgent uses this dll to communicate with MAX Communication Server. It should be registered in user system.	Re-register this file. Type in DOS command window, **regsver32 AlpInterface.dll** Change directory to MaxAgent directory, type **regsver32 AlpInterface.dll**
You have entered an invalid password. Please try again.	The password is incorrect.	Enter your extension password.
Cannot use “IP Extension integrated with IP Talk.”	You tried to log in with the IP extension option without the IP-Talk License.	Confirm that your extension is set up as an IP extension with dynamic IP address and that an IP-Talk License has been registered.

Error Message	Description	Solution
The version of Max-Agent on your desktop is out of date.	The installed version of MaxAgent does not match the version of MAX Communication Server on the system server.	Upgrade MaxAgent to match the current running version of MAX Communication Server.

Troubleshooting IP Connectivity from a Remote Location

If problems occur connecting to your company's MAX Communication Server from a remote location, they may be due to a failure to connect to your ISP or due to firewalls at your office preventing direct access to the MAX Communication Server.

As a test, you can choose **Run** from the Windows **Start** menu, then enter

`Ping <IP address> [ENTER]`

where `<IP address>` is the MAX Communication Server system you want to connect to. An example of the IP address format is 123.234.231.143

If you do not get a response, contact your LAN administrator for support.

Also, check to verify that the necessary ports are open.

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