



MaxAgent™ for Lync User Manual

June 2011

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About MaxAgent for Lync

MaxAgent for Lync is a Windows desktop application that allows workgroup agents to manage workgroup calls from their computers. It gives agents 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

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

MaxAgent for Lync integrates MaxAgent and Microsoft Lync Client and runs them side by side, so that you can easily use the two of them together. When you log in to MaxAgent, Lync opens too (if it isn't already open); when you close MaxAgent, Lync closes too.

You use MaxAgent for workgroup calls; you use Lync for instant messaging, call transfers, conference calls, and placing calls on hold. The two applications are synchronized for status/activity and work together in other ways.

Operation Notes

- MaxAgent does not display personal calls
- Only single-call handing is available for the agent
- When a workgroup call is transferred, it changes to a personal call; conference calls also become personal calls

Licensing

MaxAgent for Lync requires a MaxAgent for Lync seat 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 3.5 or higher framework
- 2 GHz CPU or above
- Windows XP SP3 or above
- 1 GB available hard drive disk space
- 1 GB RAM
- SVGA monitor (1024 x 768) with 256 color display, or better
- Keyboard and mouse
- MaxACD running on a server accessible to this client
- Microsoft Lync 2010 or higher version

Pre-Installation Checklist

Before installing MaxAgent for Lync, make sure the following is done:

- MaxACD server has been installed on the system server
- Microsoft Lync has been installed on the client machine
- TCP/IP is enabled on both machines
- The client is able to connect to the server on the network
- The person installing MaxAgent for Lync has local administrator rights on the client machine
- The extension affiliated with the client machine has a MaxAgent Seat License assigned to it

Installing MaxAgent for Lync

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

1. Close all Windows applications.
2. Insert the MaxAgent for Lync CD into the CD-ROM drive.
3. Open the **MaxAgent for Lync** folder and run the **Setup** program in that folder, following the installation instructions as they appear.

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

Uninstalling MaxAgent for Lync

1. From the Windows Start menu, choose **Control Panel > Add/Remove Programs > MaxAgent for Lync**.
2. Click **Remove** and follow the instructions.

Automatic Upgrade

Each time you start MaxAgent for Microsoft Lync, a comparison is made with the version of MaxACD that is running on the server. If your version of MaxAgent is out-of-date, you are prompted to upgrade. 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 must be open to allow an automatic upgrade. Also, performing an automatic upgrade over the Internet requires the sending of 15 MB files over the WAN, so it may take some time to complete the process.

Getting Started

This section covers the following general topics:

- *Logging In*
- *Overview of the Main Window*
- *Logging Out or Changing Workgroups*
- *Searching in Tabbed Windows*
- *Customizing the Display*

Logging In

1. Start MaxAgent from **Start > All Programs > MaxAgent for Lync**.
2. If Microsoft Lync isn't already running, you will see a message: "Microsoft Lync is starting, please wait...". When Lync is running, you can sign into MaxAgent.
3. If this is your first time logging into MaxACD, 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 will see the IP address in the Server Name field. You may use the drop-down list to select a different server.)

Server Name: maxmain.qa2010.altigen.com

Extension: 4400

Password: ****

Enable MaxCall Always save password

Sign in

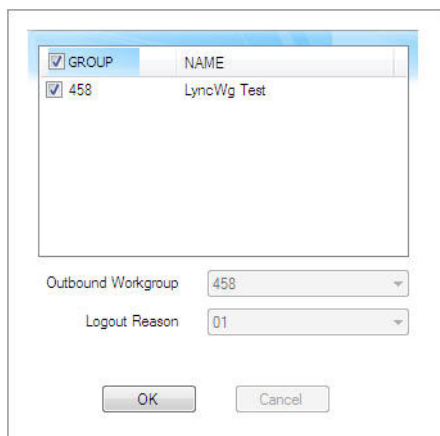
4. Enter your extension number and your password.

If you want to use MaxCall to display specific Caller ID information when you make calls, check **Enable MaxCall**.

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

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 administrator).

5. Click **Sign In**.



6. Select the workgroups you want to log into. You can log into eight workgroups simultaneously.
7. If the 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**.)
8. Click **OK**.

If your version of MaxAgent doesn't match the version of MaxACD on the system server, you are prompted to upgrade when you try to log in. (See *Automatic Upgrade* for more details.)

After you log in, the MaxAgent for Lync icon shows in the Windows tray, which is usually at the bottom corner of your screen.

When you have new voicemail messages, the icon changes to indicate that you have messages.

Reconnecting

When a connection with the phone server is broken, a message asks if you want to connect again. Click **Yes** to restore the connection.

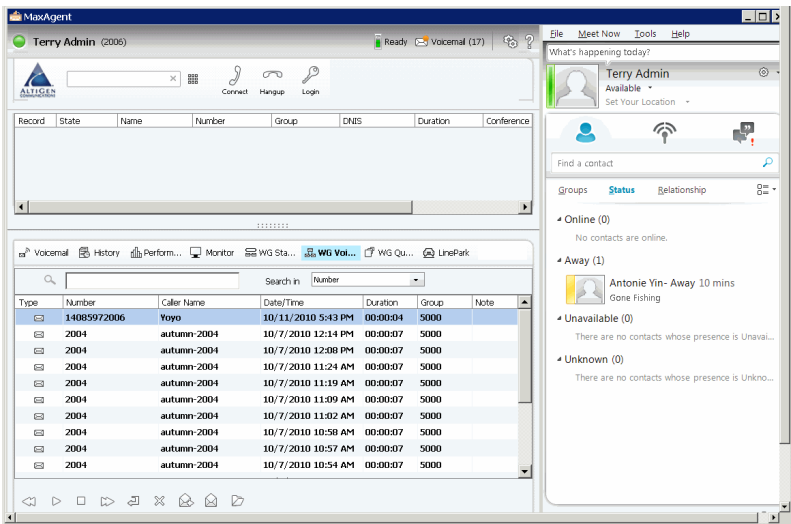
Logging In Remotely

You can use MaxAgent for Lync from a remote location if MaxAgent is installed on your remote computer. VPN or port forwarding for MaxAgent for Lync is required.

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. Click **OK**.

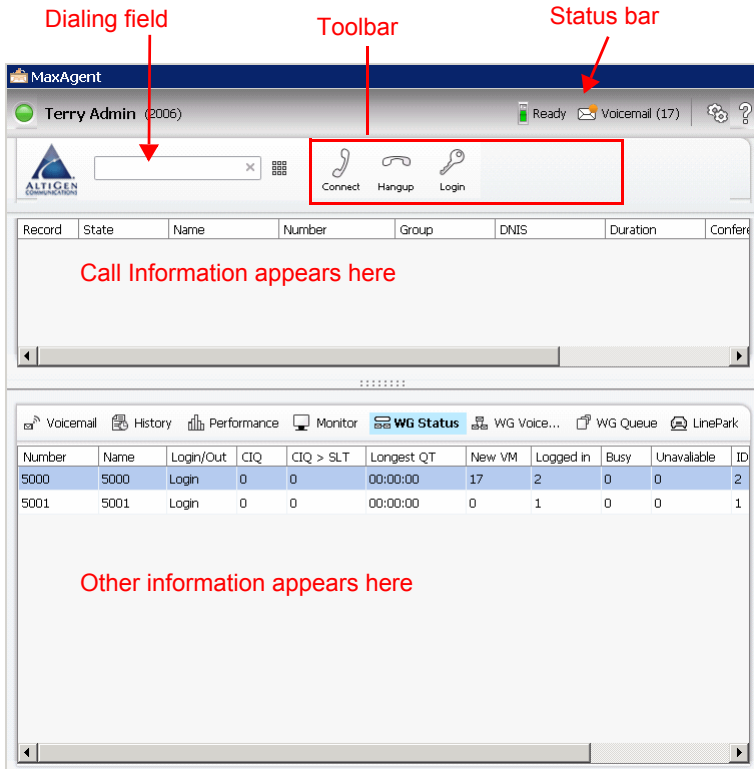
Overview of the Main Window

Once you log in, MaxAgent and Lync appear in the same window side by side, MaxAgent on the left and Lync on the right:



You use MaxAgent for workgroup calls and use Lync primarily for instant messaging, call transfers, and conference calls.

MaxAgent Side of the Window







Getting Started

MaxAgent provides tools to manage and monitor calls, and is your window into your workgroup environment.

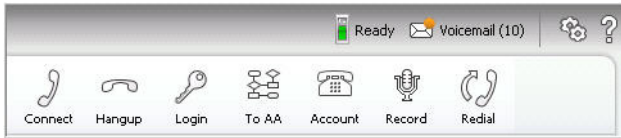
Status Bar

From the status bar, you can do the following:

- See when the agent is in wrap-up mode (you have transferred the call, sent it to voicemail, or hung up): **WRAP UP**
- Toggle between Ready and Not Ready  Ready .
- See the number of unopened voicemail messages  Voicemail (3) .
- Configure MaxAgent  (see *Configuring MaxAgent*).
- Open help  .

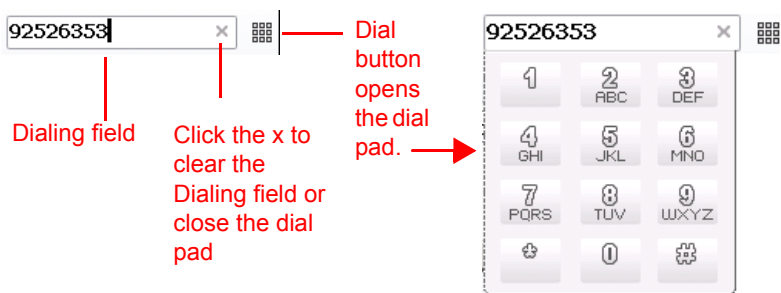
Toolbar Buttons

Toolbar buttons provide single-click functions to connect, hang up, send calls to AA (auto attendant), record, redial, and enter account code. The Login button lets you log in to other workgroups or log out of a workgroup.



You can choose which buttons to display, and the order in which you want them to appear; see *Customizing the Display* for details.

The Dialing field and Dial button are also in the toolbar. Click **Dial** to open the dial pad.



Call Information Panel

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

Record – This appears when a call is being recorded

State – The state of the active call:

- **AA** – The call is being transferred to an auto attendant
- **Busy** – The callee is busy or not available
- **Call Pending** – The call is placed into a workgroup queue
- **Conference** – The call is in conference

- **Connected** – 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
- **SIP Hold** – The workgroup call is on hold
- **Idle** – The extension is not in use
- **Play** – Playing voicemail messages
- **Record** – Recording an introductory message
- **Ringback** – The caller sees this state while the callee’s phone is ringing
- **Ringng** – 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 – The duration of the call

Conference – Indicates the conference host

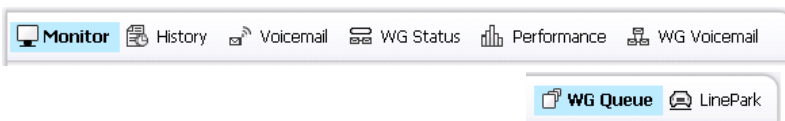
User Data – The data entered by an agent and carried with a trunk call

IVR Data – This field is filled by the IVR

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

Tabbed Pages

Eight tabbed pages are available on the bottom half of the MaxAgent screen.



Note: You will also see a MaxCall tab if you enabled MaxCall when you logged in.

Monitor – A list of extensions you have chosen to monitor. See *Monitoring Extensions/Workgroups*.

History – A history of your incoming, outgoing, and missed calls. See *Viewing the Call History*.

Voicemail – A log of unopened and opened voicemail messages left at your extension. See *Working with Voicemail Messages*.

Note: If your company is not using Microsoft Exchange Integration, you will not see personal voicemail messages in MaxAgent, but you can always check these messages in Lync.

WG Status – The real-time status of all the workgroups you're logged into. See *Viewing Workgroup Status* for details.

Performance – The performance (since midnight) for each workgroup you're logged into. Includes direct calls and workgroup calls. See *Viewing Workgroup Performance* for details.

WG Voicemail – A log of unopened and opened voicemail messages left at the workgroup extensions. See *Working with Voicemail Messages* for details.

WG Queue – A list of calls in the queue. You can pick up a call from queue if the system administrator has allowed it for your extension. See *Viewing Queues* for details.

Line Park – A list of calls parked for line park groups that you are a member of. You can pick up a parked call from the LinePark tab.

MaxCall – A list of the Campaign Caller IDs set up in the MaxACD system; you can choose the appropriate Caller ID for an outbound call. You see this tab only if you enabled MaxCall when you logged in. See *Using MaxCall*.

Setting Availability

Set your Do Not Disturb/Availability status in Lync, and it is synchronized with MaxAgent. When you set your availability to Do Not Disturb, your incoming calls will go directly to voicemail without ringing your phone.



The **Ready/Not Ready** button is a toggle; click it to toggle between the two states.


- Ready – Workgroup calls can be sent to your extension
- Not Ready – Workgroup calls won't be sent to your extension


Logging Out or Changing Workgroups

You can log out of a workgroup or change the workgroups you're logged into:

1. Click **Login** to open the Workgroup Login window.
2. Clear the check boxes next to the workgroups you're logging out from.
3. If logout reason codes are required in your system, select one in the list.
4. If you want to log into other workgroups, select their check boxes.
5. Click **OK**.

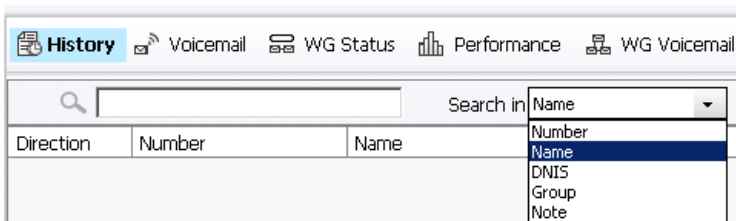
Minimizing and Closing MaxAgent

Minimize – To minimize MaxAgent for Lync, 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 – Click the  button at the top right of the MaxAgent window. Both MaxAgent and Lync exit.

Searching in Tabbed Windows

Searching is available in these tabs: History, Voicemail, and WG Voicemail.



To search,

1. In the **Search in** field, select the column you want to search in.
2. Position the cursor in the field beside the magnifying glass, and type what you're looking for. The search begins as you type, and the list narrows to records that match what you have typed.
3. When you begin a new search, the information that was displayed 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.

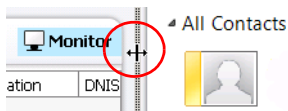
Customizing the Display

You can customize many aspects of the MaxAgent display:

- *Adjusting the MaxAgent or Lync Panes*
- *Showing or Hiding Tabs*
- *Showing or Hiding Columns*
- *Resizing, Rearranging, and Sorting Columns*
- *Showing, Hiding, or Rearranging Toolbar Buttons*
- *Hiding or Showing the Dialing Field*
- *Docking the Tabbed Pages*
- *Making a Tab a Separate Window*

Adjusting the MaxAgent or Lync Panes

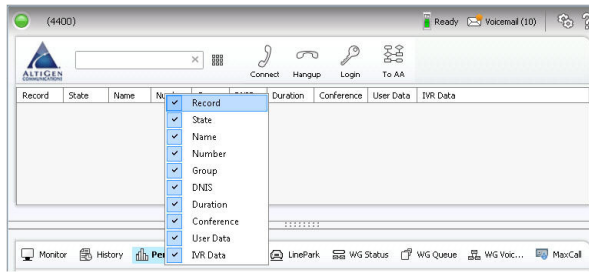
To adjust the space given to MaxAgent or Lync, position the cursor between them until you see a double arrow, then drag left or right.



You can adjust MaxAgent and Lync window sizes.

Showing or Hiding Tabs

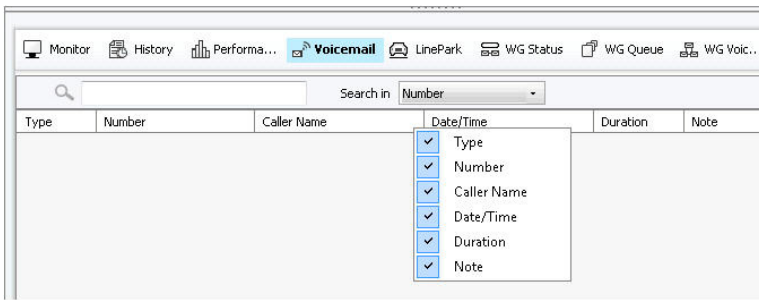
To specify the tabs you want to display, right-click any tab. A list of tabs appears:



Check the tabs you want to display; clear the tabs you want to hide.

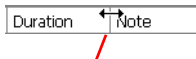
Showing or Hiding Columns

To specify the columns you want to see, right-click a column heading and check or clear the names in the list. Checked columns will be displayed.

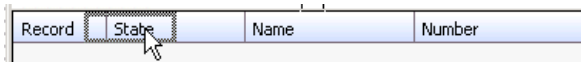


Resizing, Rearranging, and Sorting Columns

To resize columns, position the cursor on a column divider in the header area until it changes to a double arrow. Then drag to resize the column.

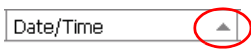


To rearrange columns, click and drag a column name to the location you want.



Moving the **Record** column to the right

To sort columns in ascending or descending order, click 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.



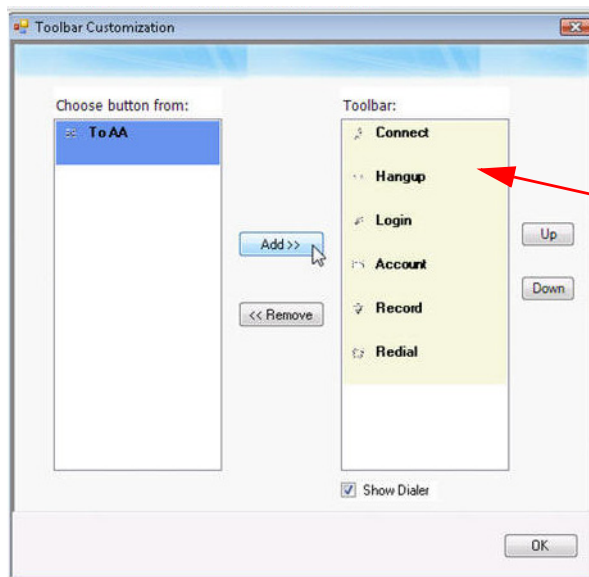
Ascending order



Descending order

Showing, Hiding, or Rearranging Toolbar Buttons

To add, remove, and rearrange the toolbar buttons, right-click in the button area and choose **Customize Toolbar Buttons**.



The list on the right shows the buttons that currently appear on the toolbar.

To remove a toolbar button, select it and click **Remove**. To add a button, select a button from the list on the left and click **Add**. To rearrange buttons, select a button in the list on the right and click the **Up** button or **Down** button, until the toolbar button is where you want it. Then click **OK**.

Hiding or Showing the Dialing Field

To remove the Dialing field, right-click a toolbar button and choose **Customize Toolbar Buttons**. In the dialog box, clear the check box for *Show Dialer*.

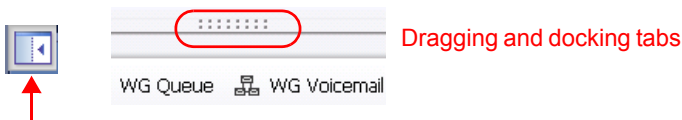
To display the Dialing field again, check the *Show Dialer* box.

Showing Pop-ups for Incoming Calls

You can have a pop-up window open when you have incoming calls. Pop ups work when MaxAgent for Lync is minimized but *not* when you have closed the application. See *Setting Call Alert Preferences* for instructions.

Docking the Tabbed Pages

To drag and dock the set of tabbed pages, left-click and hold on the dotted lines above the tabs until a docking appears. Drag to the arrow that indicates the side where you want the pages to dock. The pages will be docked at the side you selected.



When the docking arrows appear, they look like this

To drag and dock one tab, left-click and hold the tab's title until a docking arrows appear. Drag to the arrow that indicates the side where you want the tab to dock.

Making a Tab a Separate Window

To make a tab a separate window (independent of the MaxAgent main window), double-click the tab's title. 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 dotted lines above the tabs area.

Agents Working Without a Desktop

Workgroup agents who don't have a desktop to run MaxAgent can use "Agent Extension Dial Tone" to handle most agent operations.

The MaxACD server provides a special number for this; any call routed to this number from Lync through a Sip-Tie Trunk will be regarded as a feature code request call. Once the call is connected, you will hear a dial tone; at that point, enter a feature code (for example, #54 or #56) to perform an operation.

Using MaxAgent

MaxAgent call handling-related functions include:

- *Answering Calls*
- *Making Calls*
- *Placing Calls on Hold*
- *Transferring Calls*
- *Making Conference Calls*
- *Recording Calls*
- *Using Account Codes*
- *Using MaxCall*

Other call functions:

- *Working with Voicemail Messages*
- *Monitoring Extensions/Workgroups*
- *Viewing the Call History*
- *Viewing Workgroup Status*
- *Viewing Workgroup Performance*
- *Viewing Queues*

Answering Calls

To answer a call, click **Accept** in the Lync pop-up.

Click Accept to answer a call



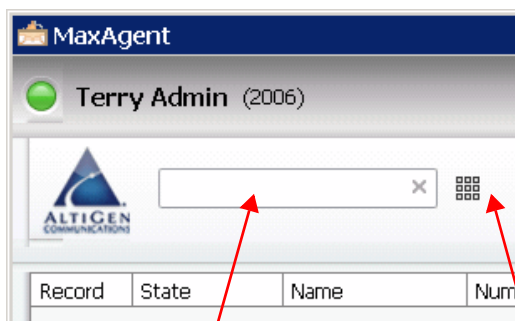
Making Calls

Note: You should dial out a personal call from Lync. The personal call will not appear in MaxAgent, but the MaxAgent line state will show **Connected** or **In Use**.

To dial a number, click in the MaxAgent Dialing field, enter a number or name, and then click the **Dial** button.

- **Enter a number** – You can enter a number in the Dialing field by using the 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 list that opens. The number for that name appears in the Dialing field.

To close the 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. Then select a name.

You can enter a number in the Dialing field

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

Shortcut-Key Dialing and Smart Tag Dialing

Shortcut-key dialing – If you configured MaxAgent to let you use shortcut keys to dial a selected phone number in another program, for example, Excel or Internet Explorer, you can make a call by selecting the number and using those shortcut keys. To find out more about this option, see the discussion of Select-N-Dial in the section *Adjusting General Settings*.

Smart Tags – If you configured MaxAgent to enable Smart Tags, you can call phone numbers from Internet Explorer by clicking a number in IE that has a dotted underline, or from Microsoft Office programs by selecting **Dial By MaxClient** from a Smart Tag beside the number. See *Configuring Max Smart Tags* for details.

Redialing

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

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

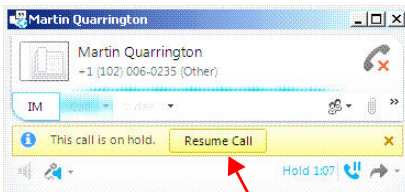
Placing Calls on Hold

To place an active call on hold, click the Hold icon in the pop-up. The state of the call changes to a *hold* state and you will hear the dial tone. You may also hear “hold” music.



Click here to place the call on hold

To reconnect, click **Resume Call**.



Click here to resume the call

Note: While you have a call on hold, no other workgroup calls will ring your extension.

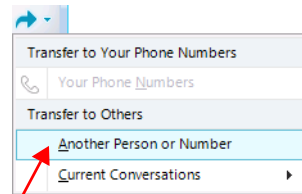
Transferring Calls

To transfer a call to another extension,

1. Click the Lync **Transfer** button.
2. From the menu, do one of the following:
 - Choose one of your numbers
 - Select **Another Person or Number** or **Current Conversations**, then click the appropriate party.



Click here to transfer the call



Choose a number, or click a command to select the right extension

Note: Lync may not show the originating Caller ID for transferred PTSN calls.

Forwarding Calls

If you are using MaxAgent Lync in a workgroup, we recommend that you do not set call forwarding in Lync.

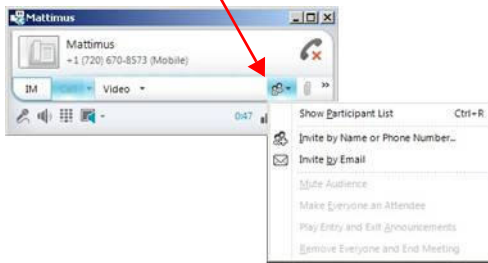
Making Conference Calls

To initiate a conference call,

1. Click the Lync Conference button.



Click here to start a conference call



2. From the menu, choose either **Show Participant List** or **Invite by Name or Phone Number**.
3. Choose the participant and click **OK**. Repeat to add more participants.

Recording Calls

The voice recording feature in MaxAgent lets you record conversations. Recorded conversations can then be played back through voicemail or accessed at a centralized location. Personal-call conversations cannot be recorded.

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 voicemail), you can use MaxAgent to initiate the recording.

- To record a call – While connected to a call, click **Record** or right-click the call and select *Start Recording* from the menu.

While a call is being recorded, a round red icon appears in the call's Record column. If your system administrator set the *Insert Recording Tone* option for your extension, both you and the caller will hear a tone when the recording begins and every 15 seconds thereafter.

- 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 voicemail, you can hear the recording through the AltiGen Voicemail 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.

Note: You can only enter account codes if MaxAgent is running.

Required account codes – If your extension was configured to require account codes for outbound calls, you are prompted you to enter a code for each outbound call. The dialog box may contain a list of account codes, depending on how the administrator has configured your extension. After entering the code, click **OK**.

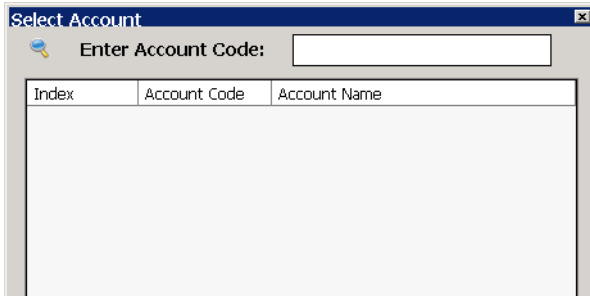
If your extension was granted permission to override the account code requirement, you can either enter an account code in the field at the top of the dialog box or enter # to bypass the account code altogether.

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

To associate a call in progress with an account code,



1. Click the **Account** button or right-click the number and choose **Account Code** from the menu.



2. If a list opens, select an account code and click **OK**. If a list does not open, enter a code in the 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.

Using MaxCall

You can use MaxCall to transmit a campaign-specific caller ID for a call, and leave a corresponding pre-recorded message if the call goes to voicemail.

When you log into MaxAgent, select the **Enable Max Call** check box on the login page.

The MaxCall tab contains the following information:

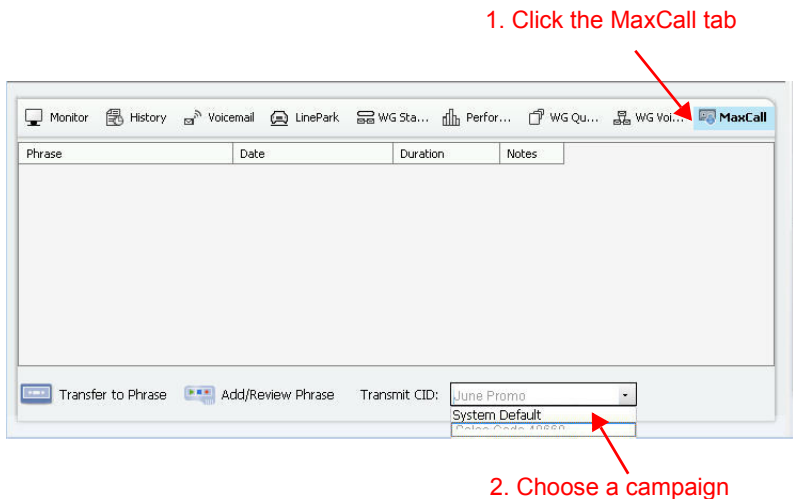
- **Phrase** – List of the phrases (scripts) that have been recorded.
- **Date** – The date that phrase was recorded or last modified.
- **Duration** – The duration of the phrase (hh:mm:ss)
- **Notes** – Notes you entered about the phrase; double-click that cell to enter notes.

This section describes the following tasks:

- *Transmitting Phrases*
- *Recording Phrases*
- *Reviewing or Deleting a Phrase*

Transmitting Phrases

1. When you are ready to make the call, click the **MaxCall** tab.
2. From the bottom bar, use the **Campaign Transmit CID** menu to choose the campaign you want to use for this call.



If the callee's phone is set to display caller ID, then that phone will show the caller ID that your administrator configured for that campaign instead of showing your actual caller ID.

3. After you choose the CID and place the call, if the call goes to voicemail, click **Transfer to Phrase**. MaxACD takes control of the call and plays the recorded phrase associated with that campaign. Your phone is released so that you are free to place another call. (You can also click the phrase after the call connects.)

Recording Phrases

To record a message to add to the phrase list,

1. On the MaxCall tab, click the **Add/Review Phrase** button.
2. In the dialog box, select **Record** and enter a name for the phrase.
3. Click the **Record** button. Your phone will ring.
4. Answer the phone and record the message.
5. Click **Stop**. The message is saved as a phrase and MaxACD adds it to the phrase list in MaxCall.

Reviewing or Deleting a Phrase

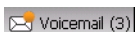
To review or delete a phrase,

1. On the MaxCall tab, click the **Add/Review Phrase** button.
2. Select **Review/Delete**.
3. Select a phrase from the pull down list.
4. (Optional) If you want to delete the phrase without listening to it, click **Delete** at this point.
5. To review the phrase, click **Review**. Your phone will ring.
6. Answer the phone and listen to the phrase. Close the dialog box when you are finished.

Working with Voicemail Messages

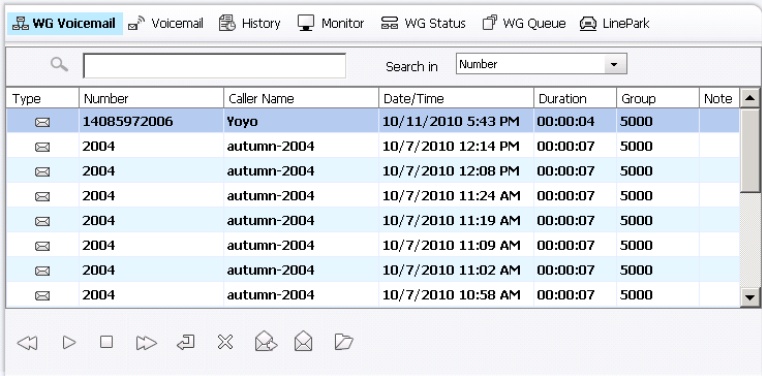
To make personal voicemail accessible through MaxAgent for Lync, go to the MaxACD Administrator setting: **System > Voicemail Configuration** and select **Synchronize with Exchange**.

Personal voicemail – Usually, you'll check personal voicemail messages from Outlook. But if your company has Exchange Integration, you can click the MaxAgent **Voicemail** tab to see your personal messages. Clicking









 in the status bar also displays the **Voicemail** tab.


Workgroup voicemail – If your workgroup is configured to see the workgroup's voicemail, click the **WG Voicemail** tab to check the workgroup voicemail.

Viewing the Voicemail Tab



The screenshot shows the MaxAgent Voicemail interface. At the top, there is a menu bar with options: Voicemail, History, Monitor, WG Status, WG Queue, and LinePark. Below the menu bar is a search field with a magnifying glass icon and a dropdown menu set to 'Number'. The main area contains a table with the following columns: Type, Number, Caller Name, Date/Time, Duration, Group, and Note. The table lists several voicemail messages, each with a white envelope icon in the Type column. Below the table is a toolbar with icons for navigation and actions.

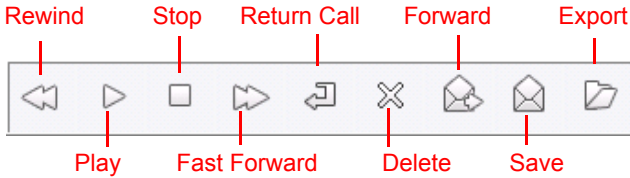
Type	Number	Caller Name	Date/Time	Duration	Group	Note
	14085972006	Yoyo	10/11/2010 5:43 PM	00:00:04	5000	
	2004	autumn-2004	10/7/2010 12:14 PM	00:00:07	5000	
	2004	autumn-2004	10/7/2010 12:08 PM	00:00:07	5000	
	2004	autumn-2004	10/7/2010 11:24 AM	00:00:07	5000	
	2004	autumn-2004	10/7/2010 11:19 AM	00:00:07	5000	
	2004	autumn-2004	10/7/2010 11:09 AM	00:00:07	5000	
	2004	autumn-2004	10/7/2010 11:02 AM	00:00:07	5000	
	2004	autumn-2004	10/7/2010 10:58 AM	00:00:07	5000	

- New voicemail messages are indicated by a white, closed envelope and bold type.
- Heard voicemail 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 message forwarded from another extension).

Listening to Voicemail Messages

Listening options are configurable, as described in *Adjusting General Settings*. You can listen using the sound card on your computer or using your phone. You can play messages to a sound card while your phone is in the connect state.

When you listen to a new message, the envelope icon changes from closed to open, indicating that the message has been heard. 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.)



- **Rewind** – Rewinds the message to the beginning
- **Play** – Plays the selected message
- **Stop** – Stops playback of the message
- **Fast Forward** – Advances quickly through the message
- **Return Call** – Calls the number from which this call was placed
 - Note: If an agent left a voicemail message for a workgroup but was not logged into any workgroup when he or she left the message, then you cannot use the *Return Call* feature to call that agent back.
- **Delete** – Deletes the selected message
- **Forward** – Forwards the selected message to another number or extension; see *Forwarding Voicemail Messages*
- **Save** – Saves the message on a server; see the section *Saving or Exporting Messages*
- **Export** – Exports the message as a .WAV file to the folder you specify; see the section *Saving or Exporting Messages*

Note: The Lync *Hold* feature is not supported when playing a voicemail message.

Saving or Exporting Messages

You can save a message as a .wav file that you can play back later. To do so, select it 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. You cannot specify where to store the file.

- **Export** – Opens a dialog box where you can name the .wav file and choose a directory in which to store it. You can then play the .wav file on a media player.

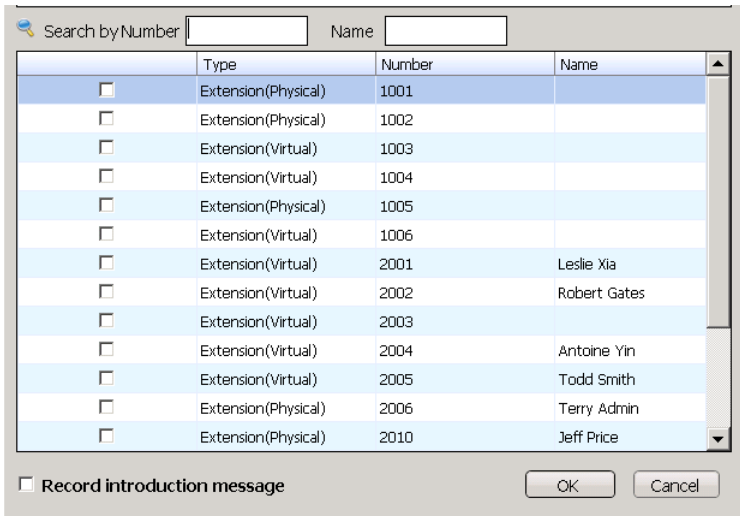
Attaching Notes to Messages

To add a note to accompany a message, double-click in the **Note** field, type your note, and click **OK**.

Forwarding Voicemail Messages

To forward a message to an extension or a VM Group,

1. Select the message and click **Forward**.



2. Check the boxes beside the groups and/or extensions to which you want to forward the message.

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.

Notes:

- You can click a column heading to sort the list.

- 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. You can leave an introductory message. Select the **Record introduction message** check box and follow the steps below.
 4. Click **OK**.

Recording an Introductory Message

1. If you select the **Record introduction message** check box, when you click **OK** to complete the forward, pick up the phone handset and you'll hear a prompt to record the message.
2. Record the message and press the pound key (#). A confirmation appears.
3. Click **OK**.

Note: You can set up VM groups (distribution lists) to forward messages to multiple recipients at the same time. See *Creating New Voicemail Groups*.


Monitoring Extensions/Workgroups

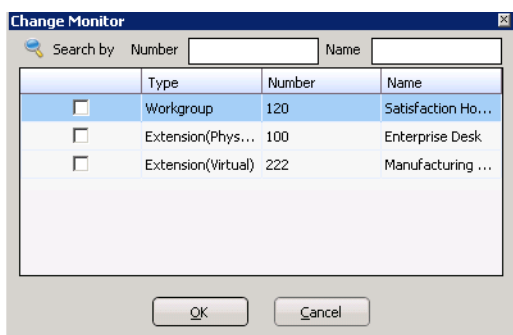
If the administrator configured your extension for monitoring, you can monitor the activity on the other extensions in your workgroup, view call history, view workgroup statistics, and view calls in queue.

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 **Select Extensions** button  at the bottom of the page. Extensions and workgroups to which your administrator has given you monitoring rights appear.



2. Select the extensions or workgroups you want to monitor, and then click **OK**. If the list is long, you can search for entries.

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

Viewing the Monitor List

The monitor window includes these fields:

- **State** – The state can be one of the following:
 - **Idle** – The extension is not in use
 - **Connected** – The extension is in use
 - **Ringing** – The phone is ringing; you can click the **State** field to pick up the call at your own extension
 - **Voicemail** – The extension is in voicemail
 - **Auto Attendant** – The extension is connected to an auto attendant
 - **On Hold** – The extension is on hold
- **Extension** – The extension being monitored
- **Name** – The name of the agent at that extension

- **Caller Name** – The name of the caller, from the Caller ID (if available)
- **Number** – The phone number of the caller
- **Department** – If the caller is an internal extension, this shows the department associated with that extension
- **DNIS** – The DNIS digits collected, if available
- **Duration** – The current duration of the call

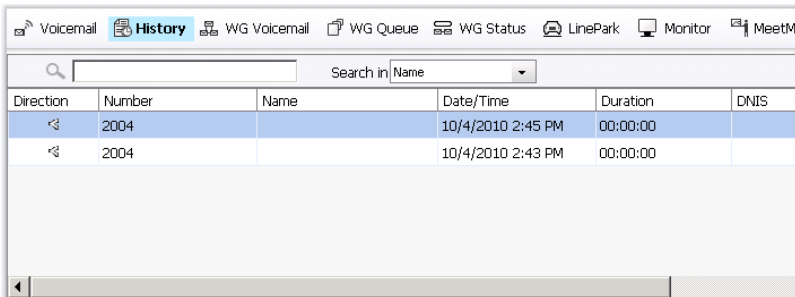
Calling or Picking Up Calls

When viewing the Monitor list, if a monitored extension is *Idle* (green dot) you can click its **Extension** field to ring the extension.

If a monitored extension is *Ringin* (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 workgroup calls. (Personal calls are not recorded in the History tab.)



Direction	Number	Name	Date/Time	Duration	DNIS
←	2004		10/4/2010 2:45 PM	00:00:00	
←	2004		10/4/2010 2:43 PM	00:00:00	

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

Information includes:

- **Direction** – Indicates if the call is incoming or outgoing, or was a missed call. *Left-pointing arrow* indicates outgoing call; *right-pointing 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** – The 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 voicemail messages is from the MaxACD server. Thus, the times displayed here may not match those in the voicemail view in the main window.

- **Duration** – The duration of the call.
- **DNIS** – The DNIS digits collected, if available.
- **Group** – The group number or name.
- **Note** – A note attached to the call. If you entered a note in the **User Data** field of the 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.

Click the **Delete** button to delete selected calls in the history list. Click the **Delete All** button to delete the entire call history list.

Viewing Workgroup Status

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

The screenshot displays two windows from the MaxAgent interface. The top window, titled 'WG Status', has tabs for Monitor, History, Performance, Voicemail, LinePark, and WG Status. It contains a table with the following data:

Number	Name	Login/Out	CIQ	CIQ > SLT	Longest QT	New VM	Logged in
5454	5454	Login	0	0	00:00:00	10	2

The bottom window, titled 'WG Queue', has tabs for WG Queue, WG Voicemail, and MaxCall. It contains a table with the following data:

Busy	Unavailable	IDLE	Service Level %
0	0	2	100

Information includes:

- **Number** – The workgroup number
- **Name** – The workgroup name
- **Login/Out** – Whether you are currently logged in or logged out
- **CIQ** – The current number of calls in the queue
- **CIQ > SLT** – The number of calls in queue greater than the service level
- **Longest QT** – The longest queue time
- **New VM** – New voicemail messages
- **Logged In** – The number of agents logged in to each group
- **Busy** – The number of agents who are busy
- **Unavailable** – The number of agents who are not available
- **Idle** – The number of agents who are idle
- **Service Level %** – The percentage of calls that exceed threshold

Viewing Workgroup Performance

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

Voicemail History WG Voicemail WG Queue WG Status Monitor Perfo				
Agent's Performance since Midni...	Total	Direct Call	5000	5001
Last Logged In Time	-	-	10/4/2010 2:...	10/4/2010 2:41:3
Last Logged Out Time	-	-	-	-
Total Logged In Time	-	-	04:04:00	04:04:00
Total Not-Ready Time(Apply to all...	00:00:00	-	-	-
Total DND/FWD Time(Apply to all...	00:00:13	-	-	-
Total Inbound Calls Answered	0	0	0	0
Total Talk Time	00:00:00	00:00:00	00:00:00	00:00:00
Average Talk Time	00:00:00	00:00:00	00:00:00	00:00:00
Total Connected Outbound Calls	0	0	0	0
Total Talk Time	00:00:00	00:00:00	00:00:00	00:00:00
Average Talk Time	00:00:00	00:00:00	00:00:00	00:00:00

Export
 Print

If you have been removed from a workgroup by the 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.

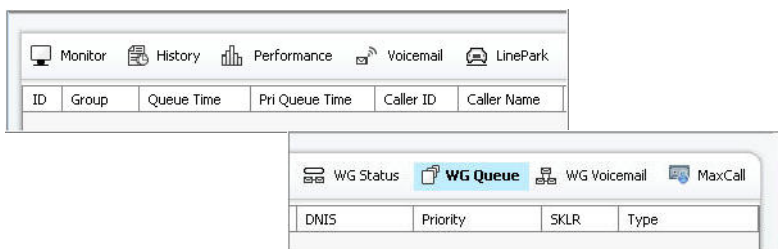
Much of the data reported here is also reported in the Supervisor's view of group statistics and is further discussed in "Viewing Group Statistics" in the *MaxSupervisor Manual*.

Click **Export** 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 **Export**), and you can print the data as a WG Queue Report (click **Print**).



Information includes:

- **ID** – The Call ID in the queue of one workgroup. The ID is unique within a workgroup, but may be repeated in all workgroups.
- **Group** – The workgroup name or workgroup number.
- **Queue Time** – The duration of the call in queue.
- **Priority Queue Time** – The 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** – The caller ID of the call in the queue.
- **Caller Name** (if available) – The name of the caller for that call.
- **DNIS** – The DNIS digits for the call in the queue.
- **Priority** – The priority level assigned to the call.
- **SKLR** – The skill level required.
- **Type** – The type of call; usually a voice call.

Picking Up Calls from Queue


To pick up a call from a workgroup queue, click on the queued call and click the **Pickup Call** icon 

Configuring MaxAgent

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

- **General Info** – Password, default trunk access, and other general settings; see *Adjusting General Settings*
- **Message Notification** – How and when you want to be notified about incoming voice messages; see *Customizing Message Notifications*
- **Alerts** – Screen pops and audio beeps; see *Setting Call Alert Preferences*
- **Playing voicemail** – Through handset or soundcard; see *Customizing How Messages Play*
- **Tab Layout** – The tabs you want to display; see *Showing or Hiding Tabs*
- **Log** – Enabling a log to be created for this application (MaxAgent for Lync) to trace errors; see *Logging 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; you remain in Configuration window
- **OK** – Saves your changes and closes the Configuration window

Adjusting General Settings

In the Configuration window, click **Extension > General Info** to edit your password and configure the following general settings for MaxAgent.

General Info

First Name: Terry Last Name: Admin

Password: ●●●●

Default Trunk Access: 9 Enable Auto-Dial Enable SmartTag

Other

Release Link Tie (IP Trunk) Select-N-Dial

Disable Auto Format Shortcut Key: Ctrl Alt Shift

- **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.
- **Enable Auto Dial** – Any phone number you dial using a Smart Tag or the Select-N-Dial method is dialed automatically. The phone number appears in the **Number** column and the state column displays *Ringling*.
- **Enable Smart Tag** – Smart Tags allow you to dial calls by clicking phone numbers in various Microsoft Office applications.
 - If this box is *not* checked, then a phone number selected by the Smart Tag method or the Select-N-Dial method is displayed in the MaxAgent dialer, and you need to click **Connect** to make the call.
 - If you check this option, two things happen:
 - In Internet Explorer, a dotted underline appears beneath phone numbers. You can click the number to make the call. The number will look like this: 888-258-4436 .
 - In Microsoft Office programs (Office 2003 and 2007), a Smart Tag action icon will appear beside phone numbers. From the drop-down menu, you can select **Dial By MaxClient**.

Whether the call is made automatically or the number is simply placed in the Dialing field depends on how you set Auto-Dial.

For instructions, see the section *Configuring Max Smart Tags*.

- **Disable Auto Format** – If the MaxACD 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 a voicemail message or when making a call from the **History** tab. If this is not right for your situation, check **Disable Auto Format**.

If the MaxACD server’s country code is not USA/Canada, MaxAgent displays the check box **Insert long distance/international dialing prefix**. When checked, MaxAgent adds the long distance/international dialing prefix (corresponding to the server’s country code) when returning a call from a voicemail message or when making a call from the call history. If the MaxACD server’s country code is USA/Canada, this check box is not displayed.

- **Select-N-Dial** – Lets you select a phone number from any window, for example, Internet Explorer, Microsoft Word, Excel, Notepad, and so on, and then press the keys you define here to dial that number. To set up this option,
 1. Check the **Select-N-Dial** box.
 2. Select a combination of keys as your shortcut: Select one key from the drop-down list. (You can select from 0-9, A-Z, and F1-F12.) In addition, check either **Ctrl**, **Alt**, or **Shift** or a combination of these keys. For example, your shortcut might be Ctrl+F2 or Alt+Shift+k. Make sure the shortcut you define is not the same as a shortcut being used in any other program you’re likely to have running.
 3. Click **Apply**.

You can use this option in conjunction with Auto-Dial.

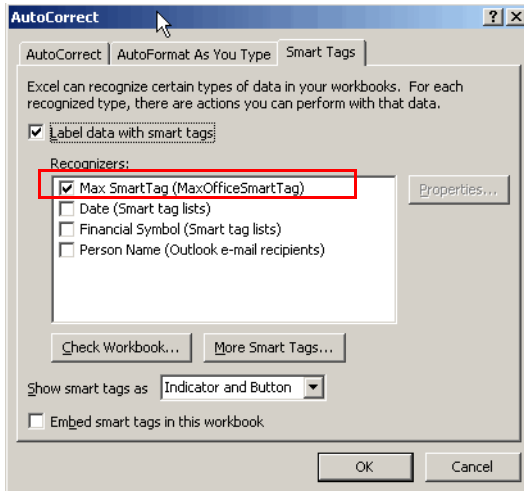
Configuring Max Smart Tags

To configure Smart Tags in Office applications, the Microsoft program in which you want to use this option must be open when you set the option. Following is the general process; steps for some specific Office applications is provided in the next few sections.

1. In the Configuration window, check **Enable Smart Tags (in Extension > General Info)**.
2. Open the application in which you want to configure Smart Tags.
3. Configure the application to use Smart Tags.
4. Close the application, then reopen it.

Configuring Office 2003 programs for Smart Tags

1. Open the Office 2003 program.
2. Select **Tools > AutoCorrect Options**, and click the **Smart Tags** tab. The next figure shows a dialog box in Excel.



4. Check **Label Data with Smart Tags**, and check **Max Smart Tag**. Click **OK**.

Configuring Office 2007 programs for Smart Tags

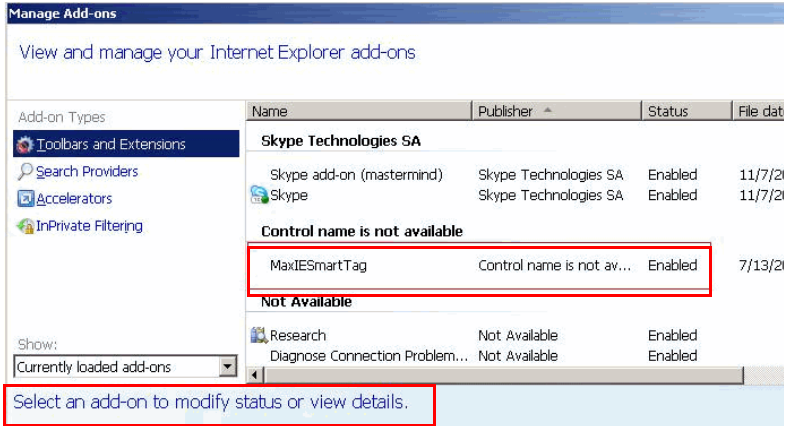
The procedure for enabling Smart Tags in Office 2007 application differs slightly from one application to another. Here are the steps to follow for two common applications.

Configuring Excel 2007 to display Smart Tags

1. Click the Microsoft Office button.
2. Click **Excel Options** (at the bottom of that window).
3. Click **Proofing > AutoCorrect Options**.
4. Select the **Smart Tag** tab.
5. Check the **Max Smart Tag** option in the window, then click **OK**.

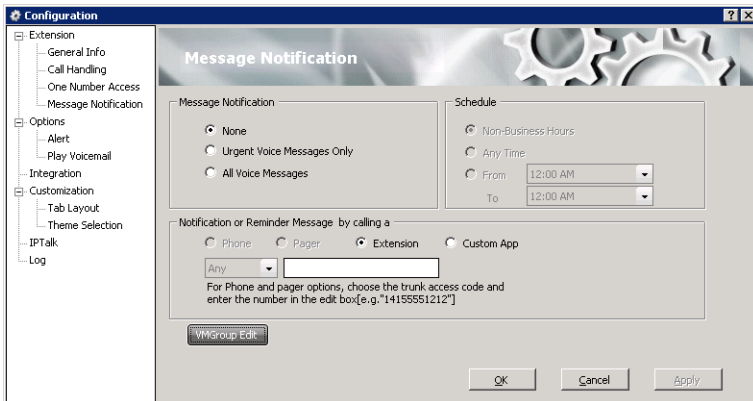
Configuring Internet Explorer to display Smart Tags

1. In Internet Explorer, click **Tools > Manage Add-ons**.
2. In the dialog box, select MaxIESmartTag, right click and select **Enable** (or click the **Enable** button on the bottom of the window).



Customizing Message Notifications

You can specify how and when you'd like to be alerted to new messages when you're away from your desk. In the Configuration window, click **Extension > Message Notification**.



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 a time range during which you want to get alerts.
- **How and where to notify you** – If you want to use the phone or pager option to an outside number, use the drop-down list to select the trunk access code and then type in the number.

Extension – Send notification to another MaxACD extension.

Custom App – Send notification to an SDK-based application.

- **Voicemail Groups** – You can set up and edit voicemail groups; see *Creating New Voicemail Groups*.

Note: You can also configure Message Notification through the Altigen Voicemail system.

Working with Voicemail Groups

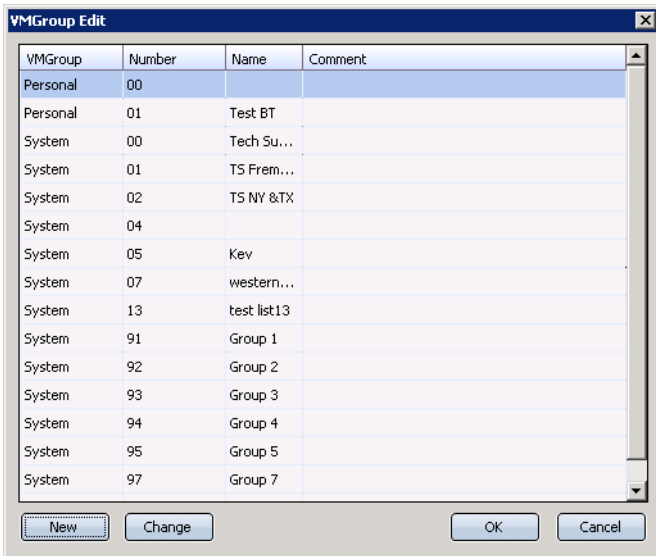
You can set up voicemail groups (distribution lists) to forward messages to multiple recipients at the same time. You can set up to 100 personal voicemail (VM) groups, each with 64 members. Group members can be any extension or another voicemail group.

There are two types of voicemail groups you can use:

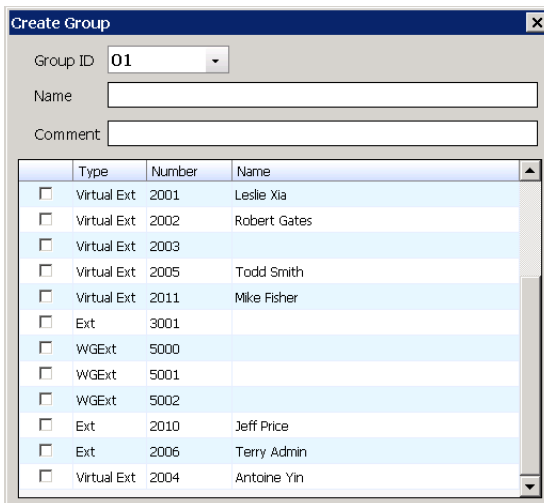
- **System-based groups** are set up by the system administrator. You can use—but not edit—these lists in MaxAgent. You can, however, add a comment that will appear in MaxAgent.
- **Personal groups** can be set up and modified in MaxAgent or in your Altigen Voicemail system.

Creating New Voicemail Groups

1. In the Configuration window, click **Extension > Message Notification**.
2. On the Message Notification page, click **VMGroup Edit**.



3. Click **New**.



4. Click the list and select a **Group ID**.

5. Enter the VM Group **Name** and any **Comments**. Comments are optional, but will help you identify the group.
6. Choose members by selecting the boxes next to the extensions. (You can click **Clear** to deselect all extensions if you need to.)
7. Click **OK**. (Or click **Cancel** to exit without saving your edits).

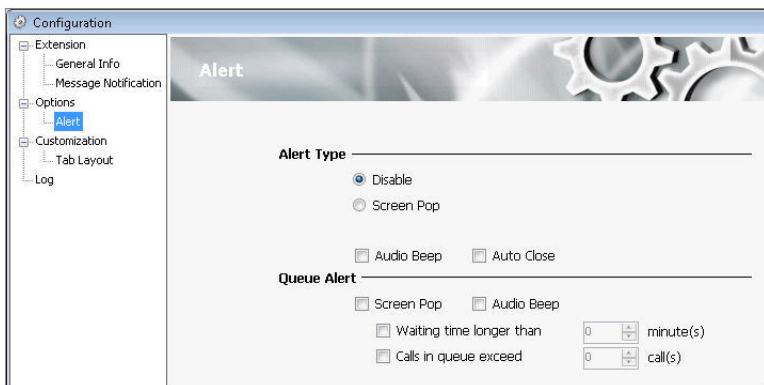
Updating Voicemail Groups

To change a personal voicemail group,

1. In the Configuration window, click **Extension > Message Notification**.
2. Click **VMGroup Edit**.
3. Select the group and click **Change**.
4. Make your changes. To add or remove a member, select or clear the check box.
5. Click **OK**.

Setting Alert Preferences

To set call notification options, use the Configuration window's **Options > Alert** screen.



Alert Type

- **Disable** – Disable the screen pop alert.
- **Screen Pop** – When a new call comes in while MaxAgent is minimized on the taskbar, the MaxAgent window pops up. You can then answer the call or perform other actions. For MaxAgent to pop up, you cannot have closed the application entirely.
- **Audio Beep** – You hear a beep you when you have a call.
- **Auto Close** – The pop up window closes after you end the call.

Queue Alert Options

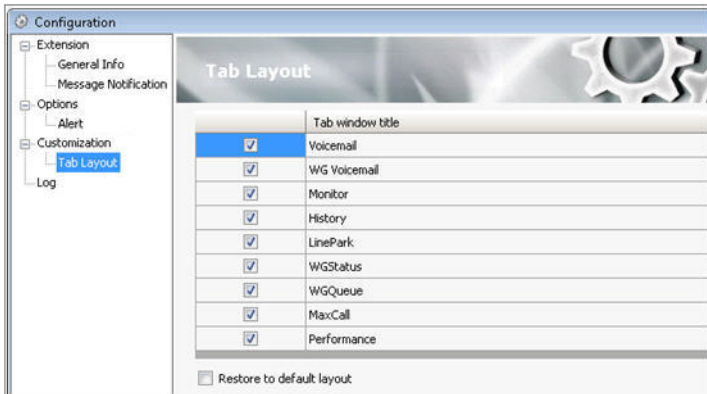
- **Screen Pop** – When a new call enters the queue, the MaxAgent window pops up.
- **Audio Beep** – You hear a beep you when you have a call.
- **Auto Close** – The pop up window closes after you end the call.
- **Waiting time longer than** – A window pops up when a call has been waiting in queue longer than the time you specify here.
- **Calls in queue exceed** – A 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 set the threshold at 3, the window pops up only when the CIQ count changes from 3 to 4; it will not open again if the CIQ count increases further.

Showing or Hiding Tabs

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 appear 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.

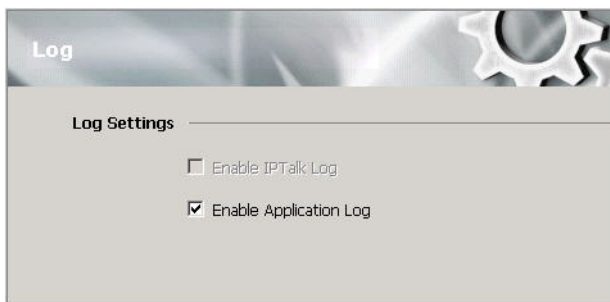


Check the tabs you want to display in MaxAgent, and click **OK**.

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

Logging Errors

If you want the system to keep an error log for troubleshooting, in the Configuration window check the **Enable Application Log** check box. The log is stored in your `\\Documents and Settings\username\Application Data\Altigen\MaxAgent Lync Edition` folder.



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