

Application Notes:
SightMax Configuration
For MAXCS Release 8.5

September 2017

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SightMax is a third-party Live Chat (Instant Messaging) platform provided by SmartMax Software. In MaxCS, AltiGen has added the ability to integrate with the SightMax Enterprise Edition software. This allows companies to receive both telephone (voice) calls and IM chats.

This document describes how to configure SightMax operators to work with MaxCS MaxAgent.

Note that SightMax has recently been renamed to ChatBeacon; that name change has not yet been incorporated into this manual.

System Requirements

In order to integrate with SightMax, your system must meet the following software requirements:

- The system must be running MAXCS release 8.5
- The system must have .NET Framework 4.6.2
- The system must have SightMax Enterprise edition installed, with operator licenses
- The system must have one Client Application SDK Session license
- The system must have a SightMax Seat license

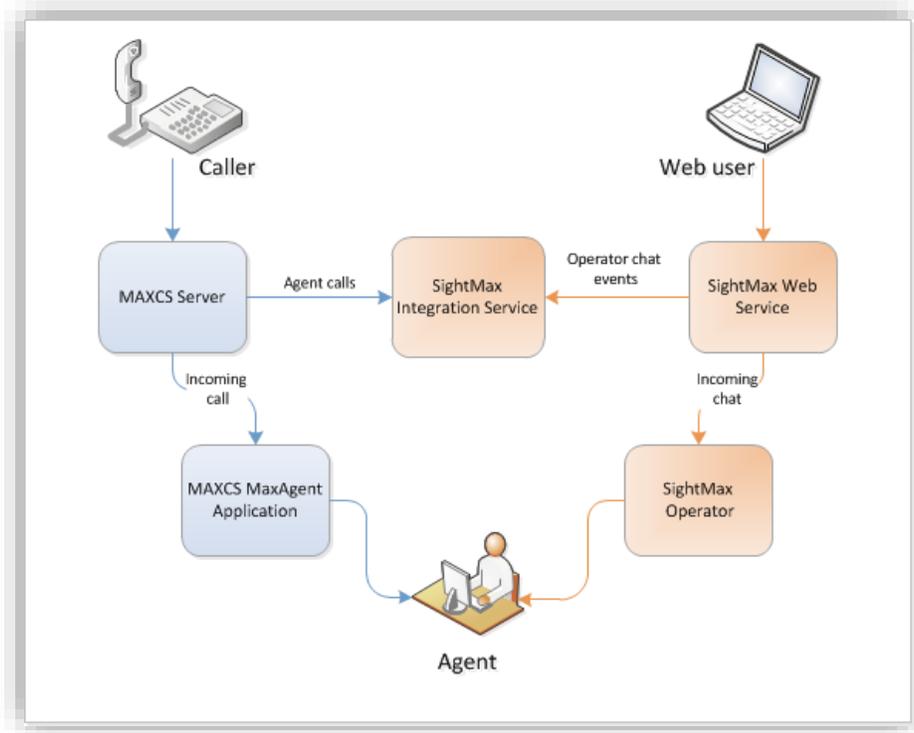
The following Windows operating systems are supported:

- Windows 2012 R2
- Windows 2008 R2 SP1
- Windows 2008 32-bit
- Windows 7 (32 bit & 64 bit)
- Windows 8.1 (64 bit)

MaxCS supports SightMax version 1.0.1.0.

Overview

The SightMax Integration service will connect with MAXCS through the AltiGen SDK. It will connect with SightMax server through the web service.



While MAXCS agents have two different states (*Ready* and *Not Ready*), SightMax operators have four: *Online*, *Away*, *Back in 5 Minutes*, and *Out for Lunch*. Operators receive new chats only in the *Online* state.

The SightMax Integration Service monitors the agent and operator states. When either server connects to an agent or operator for a voice call or chat session, it automatically changes the state on the other server accordingly, to block new chats or calls.

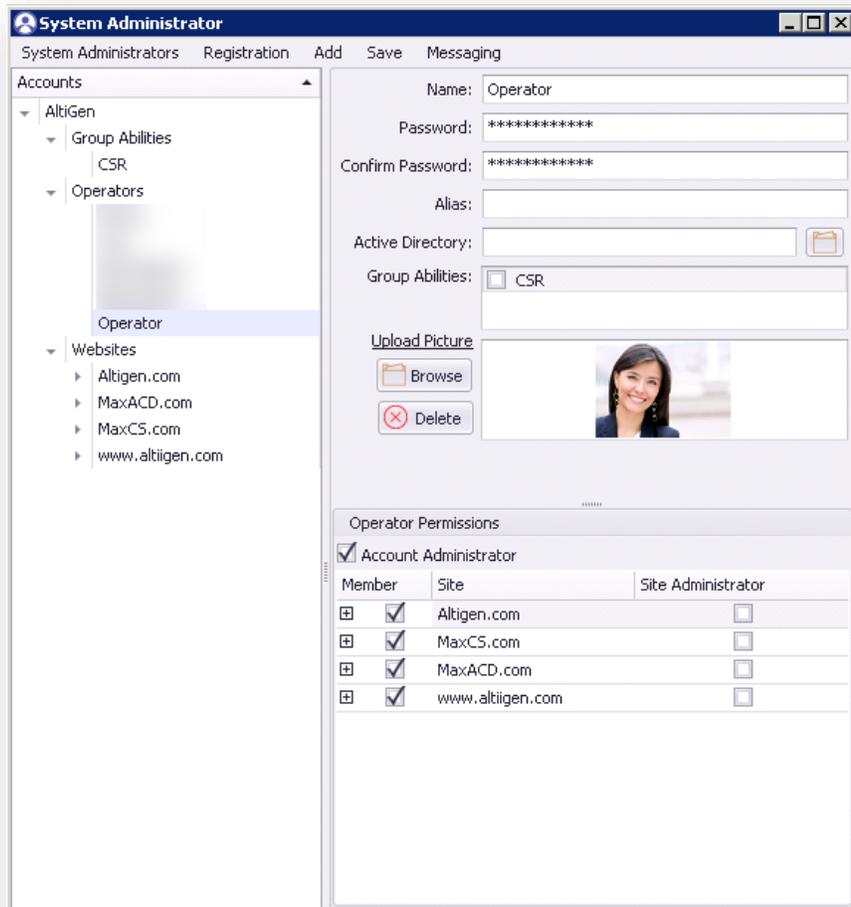
For example, if an agent receives a MAXCS server call, SightMax Integration Service sets the operator state to *Away*. When the agent's call ends, SightMax Integration Service sets the operator status back to *Online*.

Likewise, when an operator starts a chat session, SightMax Integration Service sets the agent status to *Not Ready*. When that chat session ends, SightMax Integration Service sets the agent status back to *Ready*.

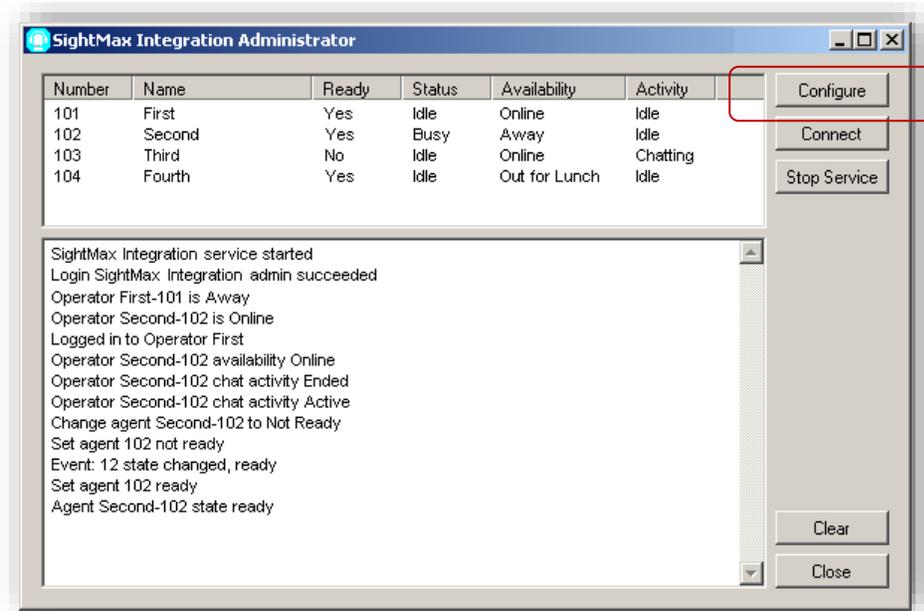
Installation

- 1 Install both MAXCS and SightMax Web Service. You can install SightMax Web Service from the company's web site: <http://www.sightmax.com/>. We recommend that you do not install SightMax on the MaxCS server.
- 2 Configure MAXCS Admin:
 - a. Open MAXCS Administrator and choose **PBX > Extension Configuration**.
 - b. Create an agent that will be used for agents to log into SightMax Integration Service. This will be one dedicated virtual extension used by all agents.

- c. Switch to the **Monitor List** tab and add all agents that will be using SightMax Integration Service to that extension's Member list.
- 3 Configure SightMax Integration Service:
 - a. Open SightMax System Administrator and create a new operator that will work for SightMax Integration Services only, granting it **Account Administrator** privileges.

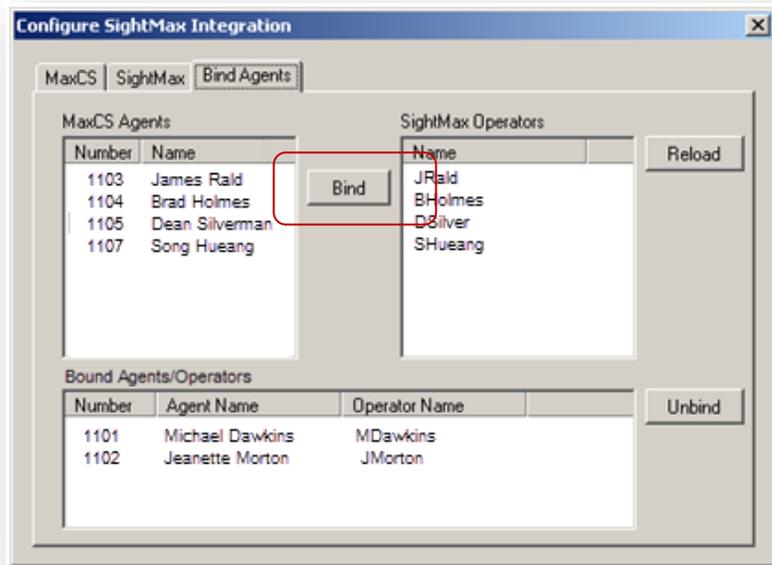


- 4 Install SightMax Integration. We recommend that you install this on the MAXCS server.
 - a. On the MAXCS installation media, open the *MaxSightIM* folder.
 - b. Within that folder, run *setup.exe*. Follow the prompts that appear on-screen.
- 5 Configure SightMax Integration:
 - a. Open SightMax Integration Administrator.
 - b. Click the **Configure** button.



- 6 On the MaxCS tab, enter the following information:
 - The MaxCS Server address
 - The user name that you configured on page 4
 - The password that you assigned to that user
- 7 On the SightMax tab, enter the following information:
 - The URL to the SightMax Web Service
 - The Admin Account username and password
 - The Admin Operator account name, user name, and password
- 8 On the Bind Agent tab, you need to bind MaxCS Agents to SightMax Operators, so that the SightMax Integration Service can coordinate Ready/Not Ready status.

To do this, click an agent in the left panel, click an operator in the right panel, and then click **Bind**. Both the agent and the operator are removed from the top two lists, and you see the bound pair in the bottom list.



In the future, if you need to unbind an agent and operator, select the pair and click **Unbind**.

Note: Statistics in some reports will be affected for agents using the SightMax Integration service, because the service sets the agent's state to Not Ready when a chat session begins, and there is currently no way to track chat sessions within MAXCS.

SightMax Version Upgrades

When SightMax upgrades their application to a new version, you will need to update the version number within the application.

- 1 Open SightMax Integration Administrator.
- 2 Click the **Configure** button.
- 3 On the SightMax tab, enter the SightMax version number.

