



# ChatBeacon Integration For MaxCS Release 8.5 Update 1

February 5, 2018



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Altigen Communications, Inc.  
679 River Oaks Parkway  
San Jose, CA 95134  
Telephone: 888-Altigen (258-4436)  
Fax: 408-597-9020  
E-mail: [info@altigen.com](mailto:info@altigen.com)  
Web site: [www.altigen.com](http://www.altigen.com)

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

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

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## System Requirements

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

- The system must be running MaxCS release 8.5 Update 1 or later
- The system must have .NET Framework 4.6.2
- The system must have ChatBeacon Enterprise edition installed, with operator licenses
- The system must have one Client Application SDK Session license
- The system must have an AltiGen ChatBeacon Seat license

The following Windows operating systems are supported:

- Windows 2012 R2
- Windows 2008 R2 SP1
- Windows 2008 32-bit
- Windows 7 (64 bit)
- Windows 8.1 (64 bit)
- Windows 10 (64-bit)

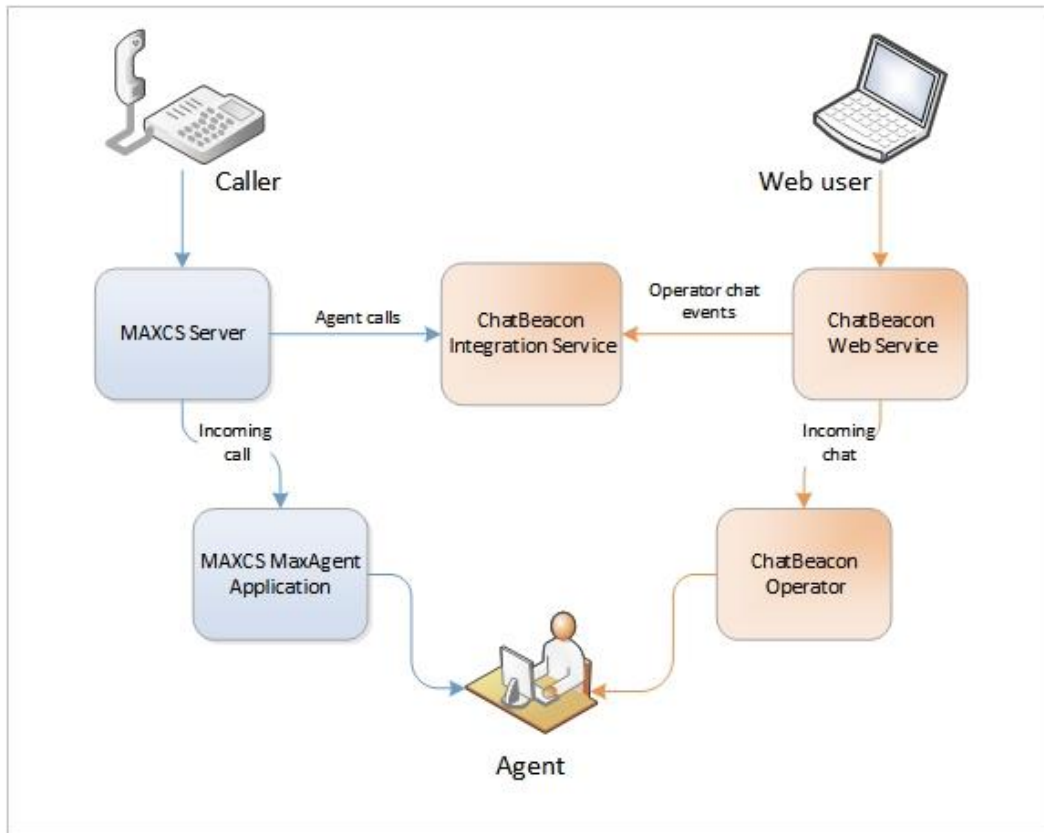
MaxCS supports ChatBeacon version 2.0.

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## Overview

AltiGen's ChatBeacon Integration Service will connect with MaxCS through the AltiGen SDK. It will connect with the ChatBeacon server through the web service.

### ChatBeacon Integration Service



While MaxCS agents have two different states (*Ready* and *Not Ready*), ChatBeacon operators have four: *Online*, *Away*, *Back in 5 Minutes*, and *Out for Lunch*. Operators receive new chats only in the *Online* state. (Be aware that the ChatBeacon Integration Service does not sync the Do Not Disturb state.)

The AltiGen ChatBeacon 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.

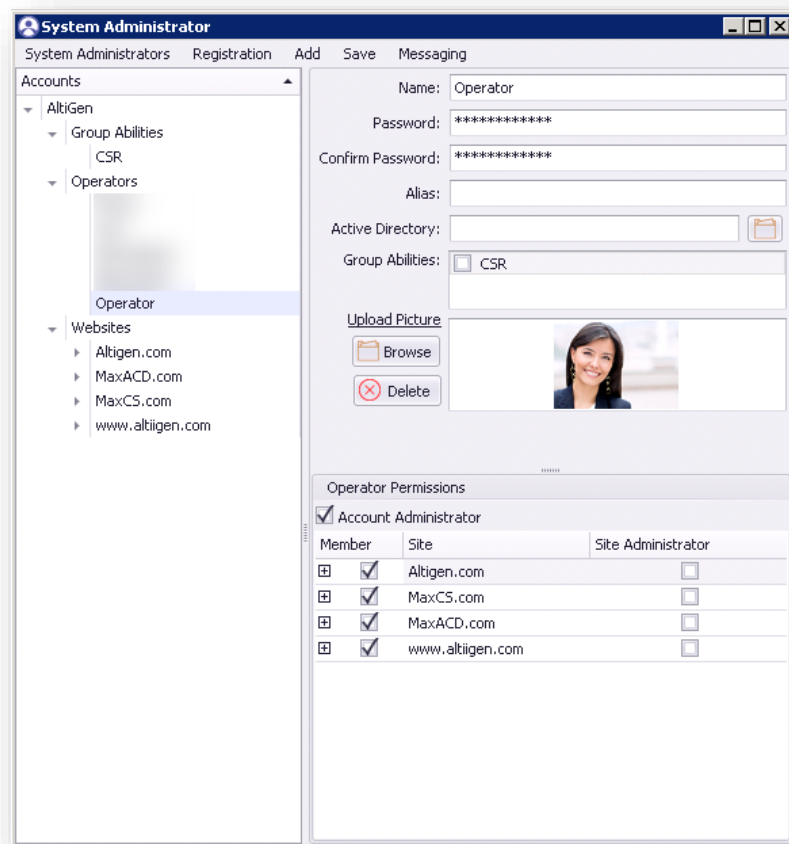
For example, if an agent receives a MaxCS server call, the Integration Service sets the operator state to *Away*. When the agent's call ends, the Integration Service sets the operator status back to *Online*.

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

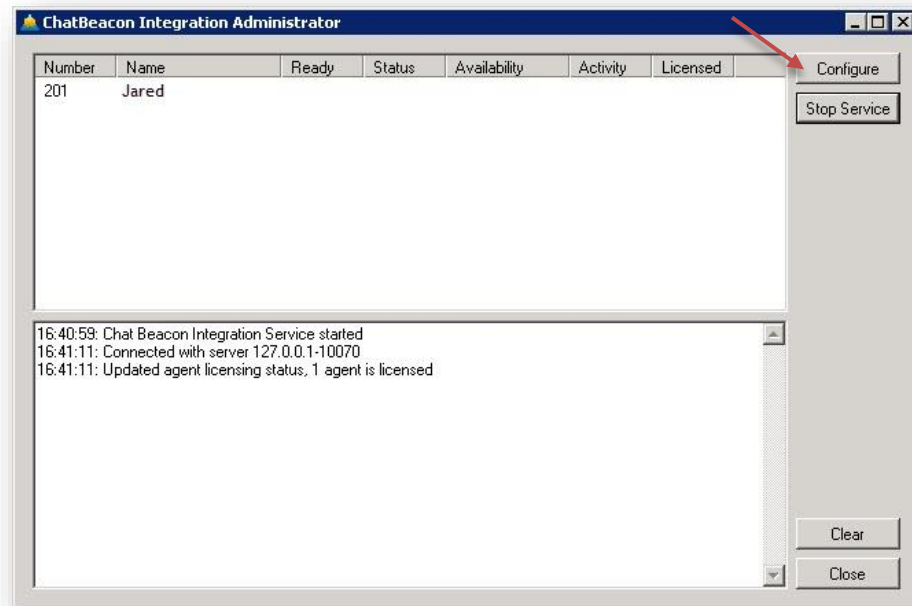
## Installation

- 1 Install both MaxCS and the ChatBeacon Web Service. You can install ChatBeacon Web Service from the company's web site: <https://www.chatbeacon.io/>. We recommend that you do not install ChatBeacon on the MaxCS server.

2. Configure MaxCS Admin:
  - a. Open MaxAdministrator and choose **PBX > Extension Configuration**.
  - b. Create an agent that will be used for agents to log into ChatBeacon Integration Service. This will be one dedicated virtual extension used by all agents.
  - c. Switch to the **Monitor List** tab. Add all agents who will be using the Integration Service to that extension's *Member* list.
3. Configure the ChatBeacon Integration Service:
  - a. Open the *System Administrator* and create a new operator that will work for the Integration Services only, granting it **Account Administrator** privileges.



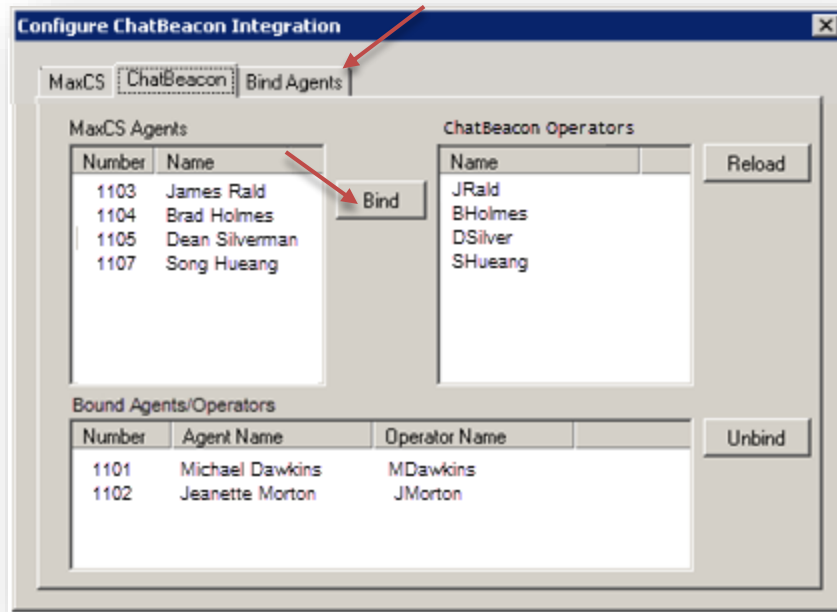
4. Install the ChatBeacon Integration Service. We recommend that you install this on the MaxCS server.
  - a. On the MaxCS installation media, open the *ChatBeacon* folder.
  - b. Within that folder, run *setup.exe*. Follow the prompts that appear on-screen.
5. Configure the Integration Service:
  - a. Open the *ChatBeacon 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 5
  - The password that you assigned to that user
- 7 On the ChatBeacon tab, enter the following information:
  - The URL to the ChatBeacon Web Service
  - The Admin Account username and password
  - The Admin Operator account name, user name, and password
- 8 On the *Bind Agents* tab, you need to bind MaxCS Agents to ChatBeacon Operators, so that the 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 click **Bind**. Both the agent and operator are removed from the top lists, and you see the bound pair in the bottom list.

(If you ever 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 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.

## ChatBeacon Version Upgrades

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

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

