MaxAgent™

User Manual

MaxACD Release 7.1

June 2019

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Contents

CHAPTER 1

About MaxAgent

MaxAgent is a 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 that is 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.

Continue to use your Skype for Business client for answering and placing calls. You will use MaxAgent for transferring workgroup calls, making conference calls, and recording calls. The two applications are synchronized for status/activity and work together in other ways.

Operation Notes

- When agents make an outbound workgroup call, conference a new member, or perform a *consultative* (formerly referred to as *Supervised*) transfer, the target MUST be either a PSTN number or a Skype for Business user. Other types of targets, such as a workgroup, IVR, voicemail, or AEP, are not supported.
- When a Skype for Business agent makes an inbound workgroup call and is connected to an agent, this user cannot transfer or invite conference members to the workgroup call.
- No early media can be heard for outbound workgroup calls.
- MaxAgent does not display personal calls.
- When a workgroup call is transferred, it changes to a personal call.
- Agents cannot record transferred calls.

- Agents must set the following option in their Skype for Business client: Set **Options** > **Status** to: **I want every-one to be able to see my presence…** Otherwise, agents may not be able to log into their workgroups. This problem arises because the agent's Skype for Business Presence cannot be detected by MaxACD when this option is not set.
- In order to make outbound workgroup or personal calls, agents must set their MaxAgent status to **Not Ready**.
- Agent passwords can be no longer than 30 characters long. If an agent's password exceeds 30 characters, the agent will get an error while trying to log in, indicating that the password is invalid.

Licensing

MaxAgent requires a MaxAgent seat license for each user.

A system administrator can verify seat licenses in the MaxAdmin by selecting **License** from the Sidebar.

Installation

The client system must meet the following minimum requirements.

Windows operating systems supported:

- Windows 10
- Windows 8.1 (64-bit)
- Microsoft .NET Framework 4.6

Minimum system requirements:

- 2GHz CPU or faster processor
- 10GB available hard drive disk space
- 2GB RAM
- SVGA monitor (1024 x 768) with 256-color (or better) display

The client system must be running Microsoft Lync client 2013 or the Skype for Business 2015 client, and it must have access to a server running MaxACD Release 7.1.

Pre-Installation Checklist

Before installing MaxAgent, make sure the following is done:

- MaxACD server has been installed on the system server
- Your system is able to connect to the server on the network
- The person installing MaxAgent has local administrator rights on your system
- Your administrator has assigned a MaxAgent seat license to you
- Your system must be upgraded to Microsoft .NET 4.6 before you perform the installation process.

Installing MaxAgent

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

1. Close all Windows applications.
2. Load the MaxACD 7.1 installation media.
3. Open the **MaxAgent** folder and run the **Setup** program in that folder, following the instructions as they appear.

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

Uninstalling MaxAgent

1. From the Windows Start menu, choose **Control Panel** > **Add/Remove Programs** > **MaxAgent 7.1**.
2. Click **Remove** and follow the instructions.

Automatic Upgrade

Each time a user starts MaxAgent, a comparison is made with the version of MaxACD that is running on the server. If the version of MaxAgent is out-of-date, you may be prompted to upgrade. If you choose to 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 17 MB files over the WAN, so it may take some time to complete the process.

CHAPTER 3

Getting Started

This section covers the following topics:

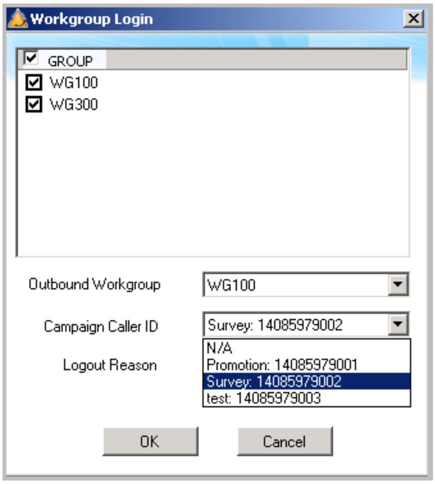
Logging In

1. Open MaxAgent from Windows by clicking **Start** > **MaxAgent**.
2. If the Skype for Business client isn't already running, it will automatically open. If your Skype for Business client is already running, you can sign into MaxAgent.
3. Enter the system server's IP address (contact your IT administrator for this address), your UPN name (which may be different from your Windows Domain name), and your Windows Domain password.

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

4. Click **Sign In**.

   If the login attempt fails, you will also need to enter the domain and user ID.



5. Select the workgroups you want to log into. You can log into eight workgroups simultaneously.
6. 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**.)
7. If Campaign Caller IDs have been configured for your workgroups, you can select the appropriate Caller ID from the list.
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.

After you log in, the MaxAgent 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.

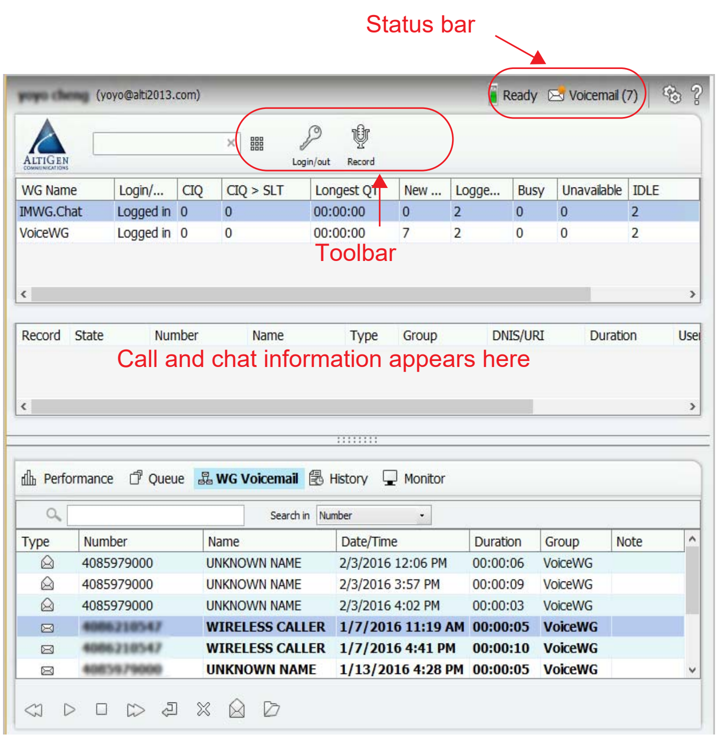
Logging In Remotely

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

1. Log in using the IP address, your user ID, and password.
2. Click **OK.**

Overview of the Main Window

Once you log in, MaxAgent and the Skype for Business client appear in the same window side by side, with MaxAgent on the left and your Skype for Business client on the right.



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:

- Toggle your status between Ready and Not Ready Ready.
- See the number of new workgroup voicemail messages (the total for all workgroups you are currently logged into).

- Configure MaxAgent (see *Configuring MaxAgent* on page 35).
- Open help .

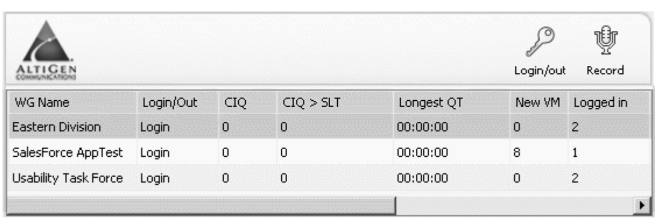
Toolbar Buttons

The Toolbar buttons let you log in or out, begin recording, connect a call, redial the last call, enter an account code, or disconnect a call.

You can choose which buttons to display, and the order in which you want them to appear; see *Customizing the Display* on page 12 for details.

Workgroup Status Panel

The Workgroup Status panel shows you the real-time status of each workgroup you're a member of.



WG Name	Login/Out	CIQ	CIQ > SLT	Longest QT	New VM	Logged in
Eastern Division	Login	0	0	00:00:00	0	2
SalesForce AppTest	Login	0	0	00:00:00	8	1
Usability Task Force	Login	0	0	00:00:00	0	2

Information includes:

- **WG Name** – The workgroup name
- **Login/Out** – Whether you are currently logged in or logged out
- **CIQ** – The current number of calls/chats in the queue
- **CIQ > SLT** – The number of calls/chat sessions in queue greater than the Service Level Threshold
- **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

Session Information Panel

The session information panel shows several columns of information about calls and chat sessions:

Record – This appears when a call is being recorded

State – The state of the active call/chat session:

- **Connected** – The call/chat session is connected
- **Conferencing** – The call is in conference
- **Hold** – The connected call is on hold
- **Proceeding** – The agent is making an out outgoing call
- **Ringback** – The outgoing call has ringback
- **Ringing** – A call or chat session is ringing
- **Error** – An error occurred while placing an outgoing call

Name – The name of the customer on the call or chat session, if available

Type – The type of session, voice call or chat session

Group – Your workgroup name

DNIS/URI – The URI Routing entry

Duration – The duration of the call/chat session

User Data – The data entered by an agent and saved to the CDR database

IVR Data – This field is filled in by the IVR

Form Data – Information that the customer provided before initiating the chat session

You can right-click an entry to access a context menu for it. Then select from commands available for that session.

Tabbed Pages

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

Performance – The performance (since midnight) for each workgroup you're logged into. Includes direct calls and workgroup calls. See *Viewing Workgroup Performance* on page 31 for details.

Queue – A list of calls in the queue. You can pick up a call from queue if the system administrator has granted you the appropriate permissions. See *Viewing Queues* on page 32 for details.

WG Voicemail – A log of unopened and opened voicemail messages left for this workgroup. See *Working with Workgroup Voicemail Messages* on page 24 for details.

History – A history of your incoming, outgoing, and missed calls. See *Viewing the History* on page 30.

Monitor – A list of the agents that you have chosen to monitor. See *Monitoring Agents and Workgroups* on page 28.

Setting Availability

When you set your Do Not Disturb/Availability status in the Skype for Business client, 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 directed to you
- Not Ready – Workgroup calls will not be directed to you

Logging Out or Changing Workgroups

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

1. Click **Login/out** 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. Click **OK**.

Minimizing and Closing MaxAgent

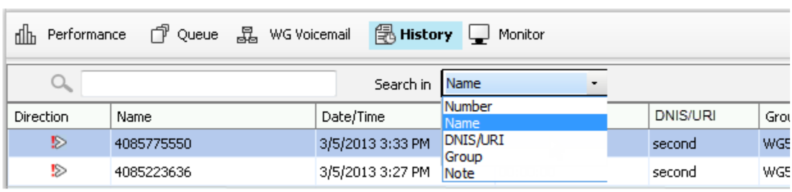
Minimize – To minimize MaxAgent, click the **Minimize** button in the top corner of the screen. MaxAgent shrinks to an icon on the Task bar.

Exit – Click the button at the top right of the MaxAgent window. Both MaxAgent and the Skype for Business client close.

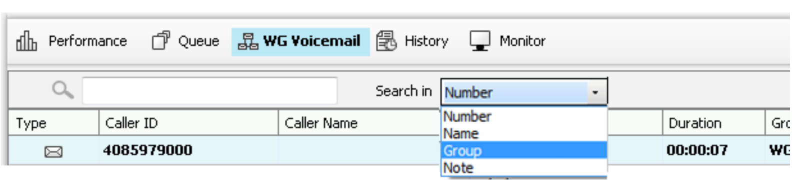
Searching in Tabbed Windows

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

In the History tab, you can search by the columns Number, Name, DNS/URI, Group, and Note.



On the Workgroup Voicemail tab, you can search by the columns Number, Name, Group, and Note.



To search,

1. In the **Search in** field, select the column you want to search in.
2. Place 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.

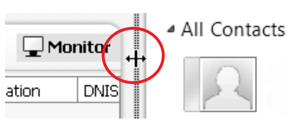
Customizing the Display

You can customize many aspects of the MaxAgent display:

- *Adjusting the Panes* on page 12
- *Showing or Hiding Tabs* on page 12
- *Showing or Hiding Columns* on page 13
- *Resizing, Rearranging, and Sorting Columns* on page 13
- *Showing, Hiding, or Rearranging Toolbar Buttons* on page 14
- *Docking the Tabbed Pages* on page 14
- *Making a Tab a Separate Window* on page 15

Adjusting the Panes

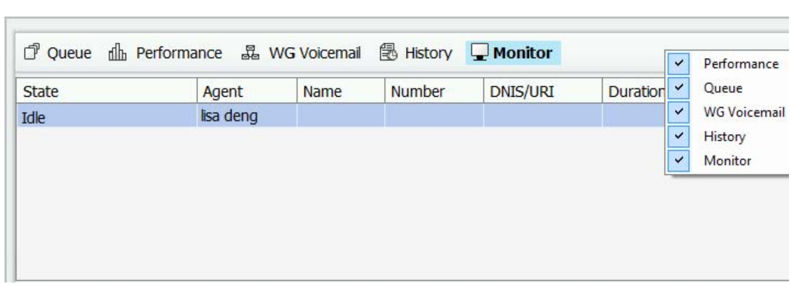
To adjust the space given to MaxAgent or your Skype for Business client, position the cursor between them until you see a double arrow, then drag left or right.



You can adjust MaxAgent and the Skype for Business client window sizes.

Showing or Hiding Tabs

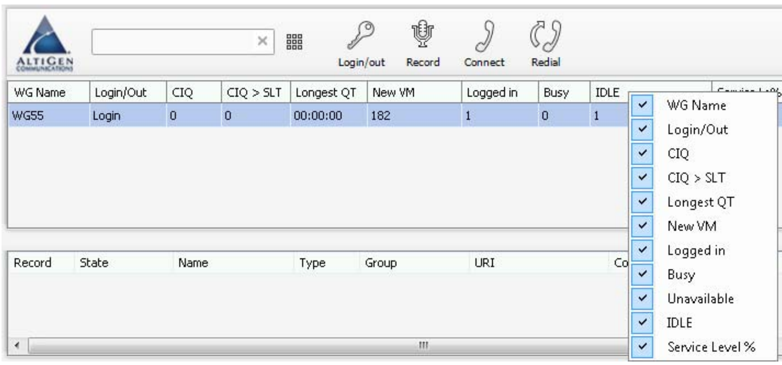
To specify the tabs you want to display, right-click to the right of the tab bar. A list opens:



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

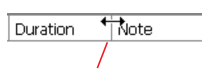
Showing or Hiding Columns

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.

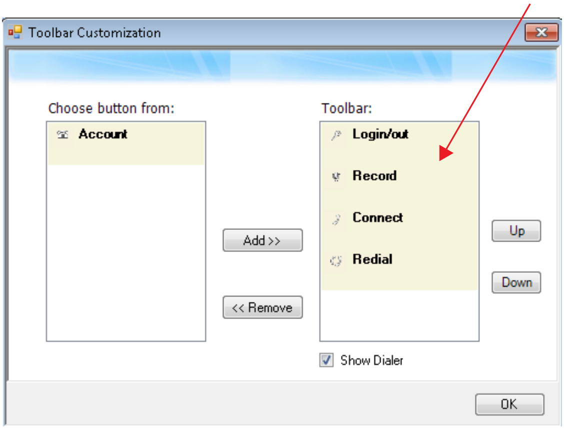
Ascending order

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.



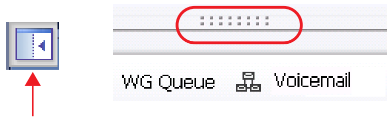
To remove a toolbar button, select it and click **Remove**. To add a button, select a button from the list on the left and click **Add**. To rearrange buttons, select a button in the list on the right and click the **Up** button or **Down** button, until the toolbar button is where you want it. Then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

Showing Pop-ups for Incoming Calls

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



Dragging and docking tabs

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 arrow appears. 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.

CHAPTER 4

Using MaxAgent

This section assumes that you have a working knowledge of making and answering calls by using your Skype for Business client.

Depending upon which workgroups you work with, you may be handling voice calls, chat sessions, or both.

Voice call functions include:

- *Answering Calls* on page 18
- *Making Workgroup Calls* on page 18
- *Placing Calls on Hold* on page 19
- *Transferring Calls* on page 20
- *Making Conference Calls* on page 23
- *Recording Calls* on page 23
- *Using Account Codes* on page 29
- *Working with Workgroup Voicemail Messages* on page 24
- *Monitoring Agents and Workgroups* on page 28
- *Viewing the History* on page 30
- *Viewing Workgroup Performance* on page 31
- *Viewing Queues* on page 32

Chat handling functions are described beginning in *Handling Chat Sessions* on page 26.

Answering Calls

To answer a call, click **Accept** in the Skype for Business client pop-up.

To end the call, click the **Hangup** button on the toolbar.

Making Workgroup Calls

While making workgroup calls, be aware of the following guidelines:

- You can place outbound workgroup calls from Skype for Business.
- Calls made from your Skype for Business client are personal calls, unless you right-click the contact and choose **Outbound Workgroup Call**. Personal calls will not be included in any workgroup or agent statistics.
- You must be logged into your Outbound Workgroup in order to make a workgroup call. You see the Outbound Workgroup setting when you log in; see the section *Logging In* on page 5.
- Before making outbound workgroup calls, set your status to *Not Ready*. If you do not make this change, then incoming workgroup calls may still be directed to you until your outbound call connects.
- MaxAgent validates that you have outbound call privileges before placing the call.
- You cannot place an outbound workgroup call to a workgroup *that is within the same MaxACD system*. If you try, the call may hang. You can, however, place a *personal* call to a workgroup in the same MaxACD system.

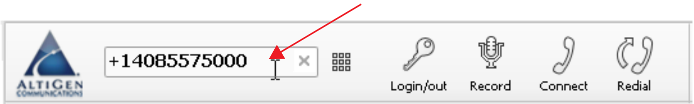
There are several ways to make a workgroup call:

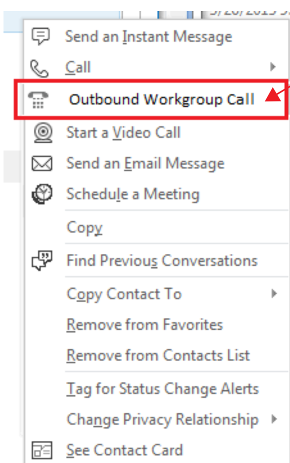
- Enter the number on the dial pad
- Click the **Connect** toolbar button
- Return a call from the Voicemail panel

- Return a call from the History panel
- Right-click the contact in your Skype for Business client and select **Outbound Workgroup call**.

Note: You cannot make an outbound workgroup call while in a conference call.

Click here and type the number



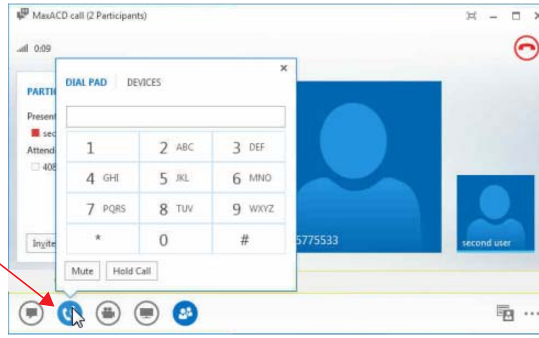


Right-click the entry in the Skype client Contact list and click **Outbound Workgroup Call**

Placing Calls on Hold

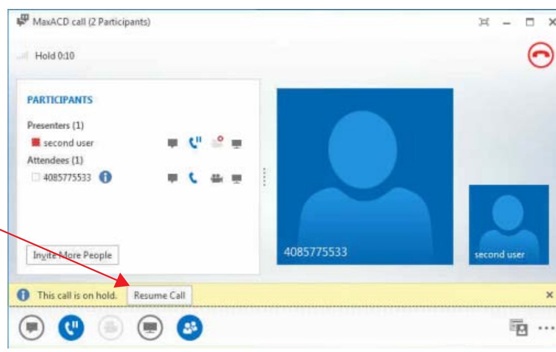
To place an active call on hold, use your Skype for Business client. The state of the call changes to a *hold* state and you will hear the dial tone. You may also hear “hold” music.

Hover over this icon and choose **Hold Call** to place the call on hold



To reconnect, click **Resume Call** in the conversation window.

Click here to resume the call



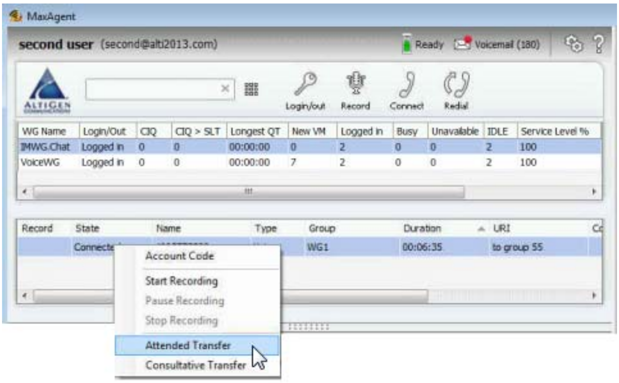
Note: While you have a workgroup call on hold, no other workgroup calls will be directed to your phone.

Transferring Calls

Agents must transfer workgroup calls using MaxAgent.

There are two types of call transfers:

- **Attended Transfer** – You switch the call to someone without speaking with the target party beforehand (in earlier releases, this was referred to as a *Blind Transfer*)
- **Consultative Transfer** – You call and speak with the target party before transferring the call (in earlier releases, this was referred to as a *Supervised Transfer*)



Note: While transferring calls, do not close the second conversation window.

When transferring calls, the Skype for Business presence in the transfer window will not update.

Note that a Federated MaxGroup Member cannot perform a transfer to an outside number.

Making an Attended Transfer

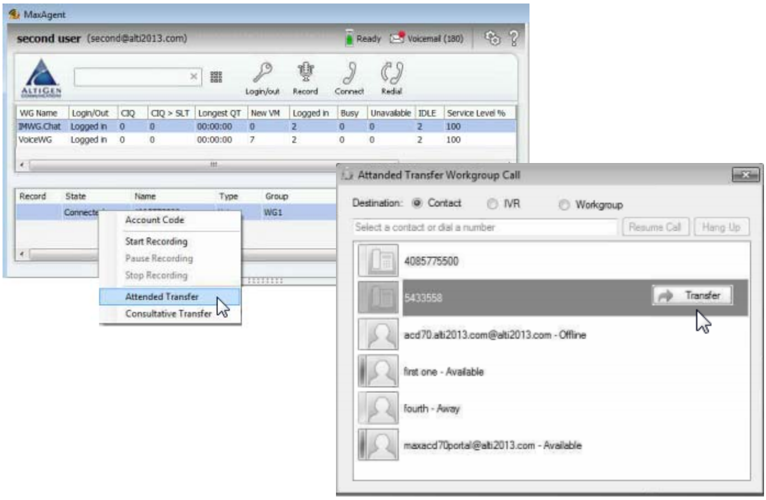
To transfer a call directly to someone without speaking to the target party,

1. Right-click the call and choose **Attended Transfer** from the list.
2. From the menu, choose the target contact (or select **IVR** or **Workgroup** and choose the appropriate target) and click **Transfer**.

   You can search for the contact by typing in the field above the list.

Considerations:

- If the destination is a contact, MaxAgent lists contacts from your *Favorites* list and your *Other Contacts* list (from your Skype settings).
- You can also enter a complete SIP URI in the search field as the destination.
- The search option only searches the contacts in your Favorites list and your Other Contacts list. To perform a global search, you must search directly from your Skype client, and then drag the contact from your Skype client and drop it onto the contact list area. In this scenario, the call transfer operation occurs immediately; there is no need to click the **Transfer** button.
- If a call transfer fails, you can either disconnect or resume the original call.



Another way to make an attended transfer is to drag a contact from Skype for Business client and drop the name to the contact list area.

Making a Consultative Transfer

Note: When making a consultative transfer, the target party MUST be either a PSTN number or a Skype for Business user endpoint. Other types of targets, such as a workgroup, an IVR tree, voicemail, or AEP, are not supported.

To speak with someone before you transfer a call to that person,

1. First, place the call on hold using the Skype for Business client.
2. Make a new call to the party that will be receiving the call on hold. **You must use your Skype for Business client to make this call, not the MaxACD client.** Discuss the call as needed.
3. When you are ready to make the transfer, return to the MaxAgent Call panel, right-click the call on hold, and choose **Consultative Transfer** from the list.
4. A window shows your active calls; click **Transfer** beside the target party.

Forwarding Calls

If you are using MaxAgent in a workgroup, we recommend that you do not set call forwarding in your Skype for Business client.

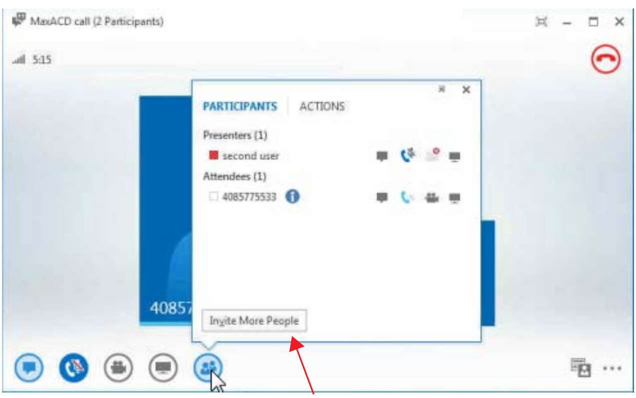
Note: If you do set call forwarding in your Skype for Business client, be aware that incoming workgroup calls will still be sent to your Skype for Business client.

Making Conference Calls

Note: When you conference a new member, the target party must be either a PSTN number or a Skype for Business user. Other types of targets, such as a workgroup, IVR, voicemail, or AEP, are not supported.

To initiate a conference call,

1. Begin with the first call.
2. In the window, click the Skype for Business **Conference** button and choose **Invite More People**.



Click here to add other agents to the call

3. A list of agents opens. From the list, choose other participants and click **OK**. To select more than one agent, use **Ctrl-Click** to select multiple names.

Recording Calls

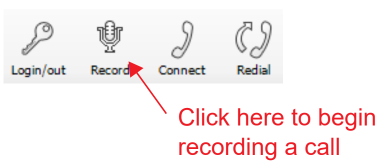
The voice recording feature in MaxAgent lets you record conversations. Recorded conversations can then be played back through voicemail or accessed at a centralized location. Personal-call conversations cannot be recorded.

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. or busy call handling.

Recording on Demand

If the system administrator has configured your account 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** on the toolbar or right-click the call and select **Start Recording** from the menu.

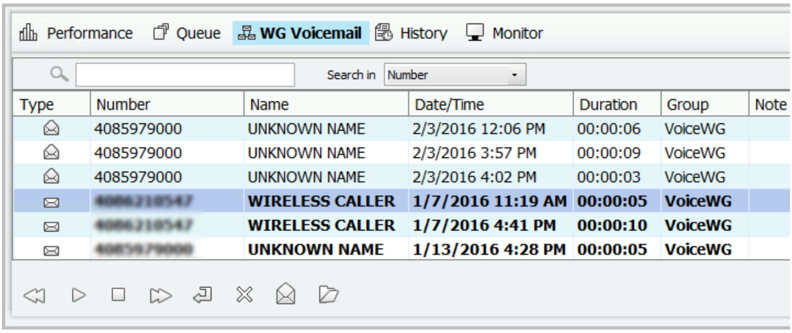


While a call is being recorded, a round red icon appears in the call's Record column. If your system administrator set the *Insert Recording Tone* option for your account, both you and the caller will hear a tone when the recording begins.

- 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 voicemail, you can hear the recording through your Outlook or Skype for Business client. If the recording is being saved to a centralized location, contact the system administrator for the location.

Working with Workgroup Voicemail Messages

If your workgroup is configured so that agents can see their workgroup's voicemail messages, click the **Workgroup Voicemail** tab to see the workgroup voicemail messages.

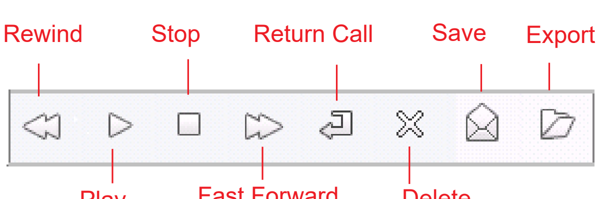


- The number of new workgroup voicemail messages appears in an icon on the status bar. This number reflects the number of new messages from the workgroups displayed in MaxAgent. If your administrator has not configured you to see voicemail messages for a specific workgroup, you will not see those messages in MaxAgent.
- 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 has a small disk on it.

Listening to Voicemail Messages

Listening options are configurable, as described in *Adjusting General Settings*. You must have a media player installed on your system in order to listen to voicemail messages. You can listen using the sound card on your computer.

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



- **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 a voicemail message is left for a workgroup, but you are not currently logged into that workgroup, you cannot use the **Return Call** feature to call the party back.
- **Delete** – Deletes the selected message
- **Save –** Saves the messages on a server
- **Export** – Exports the message as a .WAV file to the folder you specify; see the section *Saving or Exporting Messages*

Note: The Skype for Business client *Hold* feature is not supported when playing a voicemail message.

Returning Calls from Voicemail Messages

You can return a call from a message on the WG Voicemail tab; just click the **Name** field for that record.

Saving or Exporting Messages

Click **Save** to save the message to the remote server location, as configured by your administrator.

You can also save a message as a .wav file that you can play back later. To do so,

1. Select the message and click the **Export** button (or right-click the message and choose **Export**).
2. Name the .WAV file and choose directory in which to store it. You can then play the .wav file on a media player.

Attaching Notes to Messages

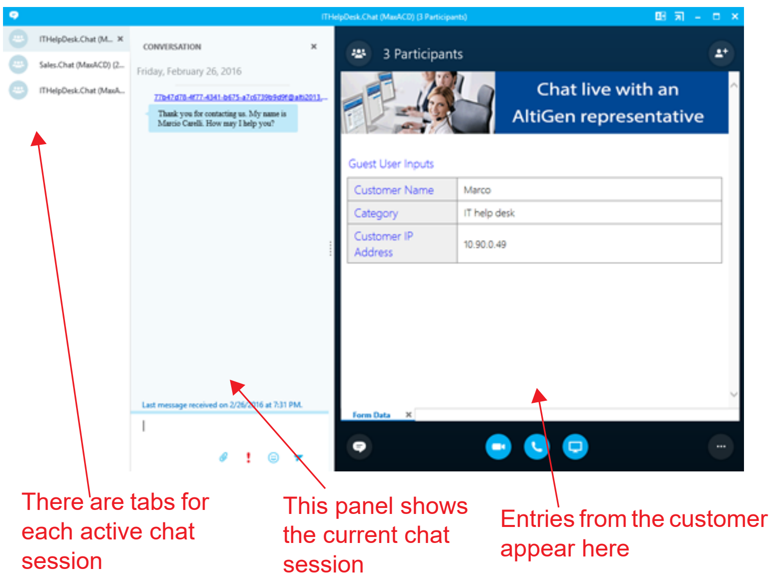
To add a note to accompany a message, double-click in the **Note** field, type your note, and press **Enter**.

Handling Chat Sessions

MaxAgent supports chat sessions, in addition to voice calls.

- Web chat entries appear in the Call Window, just as voice calls do.

- The DND setting in the Skype for Business client applies to both voice calls and chat sessions.
- You can enable or disable a chat Auto-Answer feature, which is similar to the voice call Auto-answer parameter.
- When you have multiple chats open at the same time, they will appear as tabs in the window.



You receive chat requests via a popup. In the popup, you can either accept or reject the incoming chat session.

Depending upon the way your administrator has configured your account, you can handle multiple chat sessions. Each active chat session appears on a separate tab; to respond to a chat, click that tab and type your question or response to the customer.

Note: In some cases, if you forward or transfer a chat to another Skype user, the Form Data (the information that the customer entered) may not display.

Picking Up Chats From the Queue

You can pick up chats from the queue, if this ability has been enabled by your administrator.

Note: In some cases, if a customer closes the chat browser window, it may take up to 55 seconds for that chat to drop from the MaxAgent queue. Not all browsers send events indicating that a session has closed. Because of this, you may occasionally pick up a chat that does not connect; you do not connect because there was a delay in letting MaxAgent know that the customer had closed the browser window.

Monitoring Agents and Workgroups

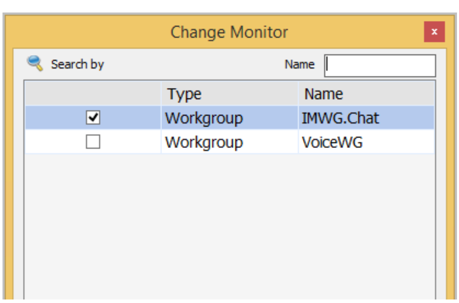
If the administrator configured your account for monitoring, you can monitor the activity of the other agents in your workgroup.

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

Choosing Workgroups to Monitor

To choose workgroups to monitor:

1. Click the **Monitor** tab, and click the **Select Users** button at the bottom of the panel. Users and workgroups to which your administrator has given you monitoring rights appear.



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

   The agents and groups that you selected will appear 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 line is idle
  - **Connected** – The agent is connected to a call
  - **Ringing** – The agent's phone is ringing
  - **Hold** – The agent has a workgroup call on hold
  - **Busy** – The agent's Presence is Busy or the agent is on a direct call or chat session
  - **Proceeding** – An outbound call is being made
  - **Ringback** – The outbound call is now getting ringback
  - **Conferencing** – The call is in conference
  - **Unstaffed** – The agent has signed out of Skype for Business
  - **Error** – An error has been detected while making an outgoing call
- **Agent** – The agent who is being monitored
- **Name** – The name of the customer (if available)
- **Number** – The phone number of the customer (if available)
- **DNIS/URI** – The URI digits collected, (if available)
- **Duration** – The current duration of the call or chat session

Using Account Codes

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

Account codes apply to incoming calls, outgoing workgroup calls, and chat sessions.

Note: You can only enter account codes from MaxAgent.

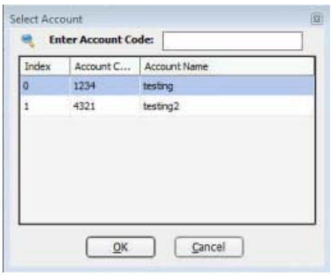
Required account codes – If the system administrator configured your account to require account codes for outbound workgroup calls, you are prompted you to enter a code for each outbound call. The dialog box may contain a list of account codes, depending on how the administrator configured your account.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

If your account 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, or a chat session, with an account code, click the **Account** button or,

1. In the Call panel, right-click the call and choose **Account Code** from the menu.

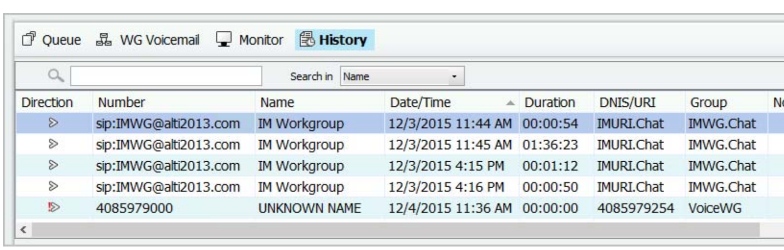


2. If a list opens, select an account code and click **OK**. If a list does not open, type a code in the field and click **OK**.

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

Viewing the History

Click the **History** tab to view data about handled workgroup calls and chat sessions. (Personal calls are not recorded in the History tab.)



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

Information includes:

- **Direction** – For calls, 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 of the call or chat.
- **Name** – The caller ID information, if available.

- **Date/Time** – The date and time of the call or chat session.

  When you sort on Date/Time, calls and chats are sorted by last disconnected and not in the order the call/chat 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/chat data is based upon the client system, while the timestamp for voicemail messages is based upon 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/chat session.
- **DNIS/URI** – The URI routing rule name.
- **Group** – The workgroup name.
- **Note** – A note attached to the call. If you entered a note in the **User Data** field of the call, it appears here. To enter a note on the **History** tab, double-click the **Note** field and type your note.

To select a record in this panel, click any field except the name.

To return a call, click the name.

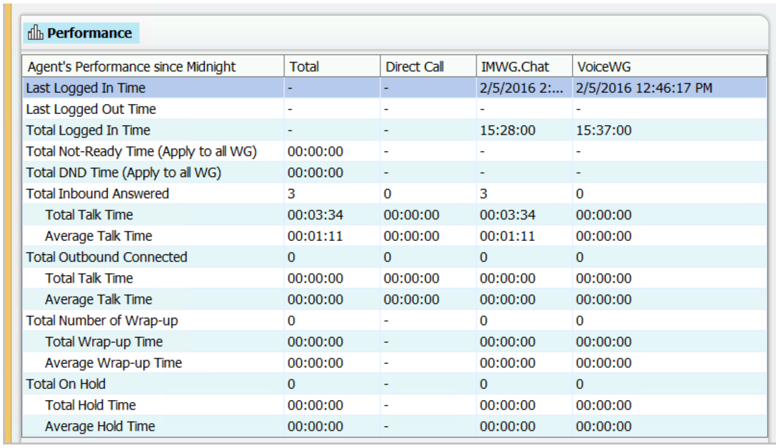
Click the **Delete** button to delete selected entries in the history list. Click the **Delete All** button to delete the entire history list.

Returning Calls From the History Tab

You can return a call from a record on the History tab; just click the **Number** field for that record.

Viewing Workgroup Performance

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



Performance

Agent's Performance since Midnight	Total	Direct Call	IMWG.Chat	VoiceWG
Last Logged In Time	-	-	2/5/2016 2:...	2/5/2016 12:46:17 PM
Last Logged Out Time	-	-	-	-
Total Logged In Time	-	-	15:28:00	15:37:00
Total Not-Ready Time (Apply to all WG)	00:00:00	-	-	-
Total DND Time (Apply to all WG)	00:00:00	-	-	-
Total Inbound Answered	3	0	3	0
Total Talk Time	00:03:34	00:00:00	00:03:34	00:00:00
Average Talk Time	00:01:11	00:00:00	00:01:11	00:00:00
Total Outbound Connected	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 Number of Wrap-up	0	-	0	0
Total Wrap-up Time	00:00:00	-	00:00:00	00:00:00
Average Wrap-up Time	00:00:00	-	00:00:00	00:00:00
Total On Hold	0	-	0	0
Total Hold Time	00:00:00	-	00:00:00	00:00:00
Average Hold Time	00:00:00	-	00:00:00	00:00:00

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.

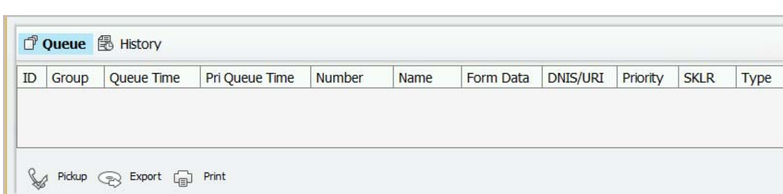
Much of the data reported here is also reported in the Supervisor's view of group statistics and is further discussed in "Viewing Group Statistics" in the *MaxSupervisor Manual*.

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 **Queue** tab to view the calls/chat sessions 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 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.
- **Number** – The caller ID of the call in the queue (if available).
- **Name** (if available) – The name of the customer (if available).
- **Form Data** – Contains a link; click the link to view Information that the customer provided before initiating the chat session.
- **DNS/URI** – The URI routing rule name.
- **Priority** – The priority level assigned to the call/chat session.
- **SKLR** – The skill level required.
- **Type** – The type of session (voice call or chat session).

Picking Up Calls from Queue

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

Configuring MaxAgent

Using the MaxAgent Configuration window, you can configure various behaviors and options.

Note: Some options may not be available to you.

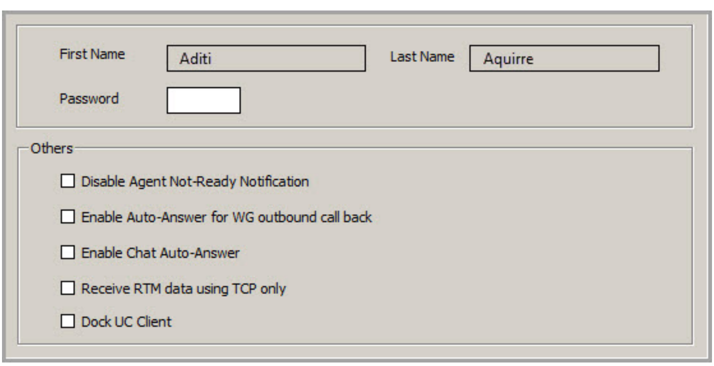
Click the button in the upper right of the MaxAgent main window to configure these options.

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 **General Info** to configure the general settings for MaxAgent.

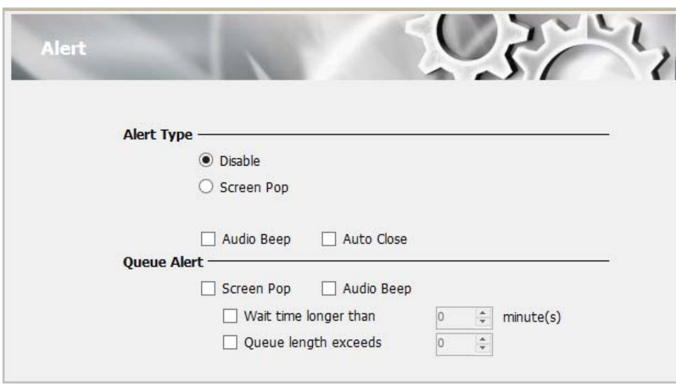


- **Disable Agent Not-Ready Notification** – Disables the pop-up that indicates that your status is now “Not Ready.”
- **Enable Auto-Answer for WG outbound call back** – When enabled, sets Skype for Business to automatically answer the internal call and place the outbound workgroup call. If you clear this checkbox, you will need to “answer” the ringback Skype for Business call before Skype for Business makes the actual outbound call. We recommend you leave this setting enabled.

- **Enable Chat Auto-Answer** – When this option is selected sets Skype for business to automatically answer chat requests.
- **Receive RTM Data using TCP only** – Forces MaxAgent to use TCP instead of UDP/multicast. This setting is appropriate when agents are working across different networks.
- **Dock UC Client** – Docks the Skype for Business client panel with MaxAgent. To undock the Skype for Business client, clear this checkbox. If you change this setting, you must restart MaxAgent in order for the change to take affect.

Setting Alert Preferences

To set call notification options, use the Configuration window's **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.

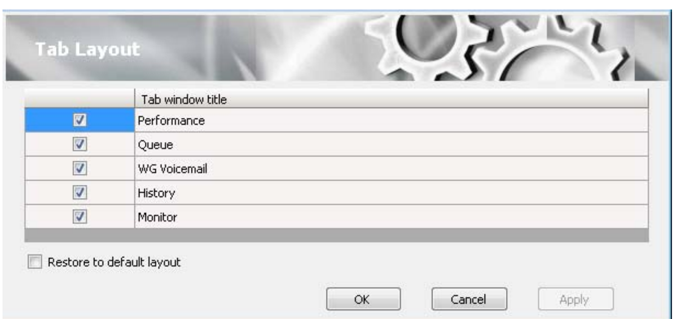
- **Wait time longer than** – A window pops up when a call has been waiting in queue longer than the time you specify here.
- **Queue length exceeds** – A window pops up when the number of calls in queue exceeds the number you specify here. You must close the window manually.

  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.

You can also configure the tabs in the Configuration window’s **Tab Layout** screen.



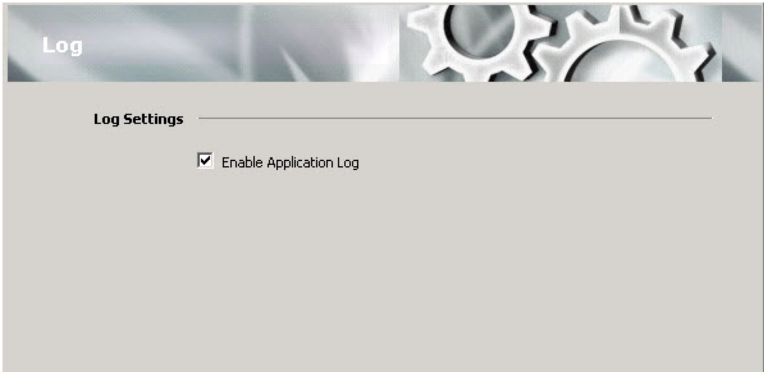
Check the tabs you want to display in MaxAgent, and click **OK**.

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’s **Log** screen, check the **Enable Application Log** check box.

The log is stored in your \\Documents and Settings*username*\\Application Data\\AltiGen\\MaxAgent Skype for Business Edition folder.


Log
Log Settings
Enable Application Log

Index