



MAX Communication Server Release 8.6.1

New Features Guide

December 5, 2019



Contents

About This Guide	3
Requirements	3
Installation Procedures.....	3
Overview of MaxCS 8.6.1 Enhancements	3
Callback from Queue Configuration Enhancements	5
MaxSupervisor: Hide Logged Out or Unstaffed Agents	7
MaxSupervisor: Manually Set Agents to Ready or Not Ready State	8
MaxSupervisor: Auto-sorting No Longer Disabled on Agent State Tab.....	8
Release 8.6 Enhancements.....	8
VMWare Support.....	8
Polycom VVX Firmware Auto-Upgrade Enhancements.....	8
Backup Program Enhancements.....	9
MaxCS Client Upgrade Enhancements	9
Trace Enhancements	9
Midnight Task Scheduling Enhancements	10
Exception Routing.....	10
OpenJDK Support.....	12
Not Ready Reason Codes.....	14
Call Disposition Codes.....	15
Account Code Enhancements.....	18
Operational Notes and Limitations.....	19
Altigen Technical Support.....	19

NOTICE: While every effort has been made to ensure accuracy, Altigen Communications, Inc., will not be liable for technical or editorial errors or omissions contained within the documentation. The information contained in this documentation is subject to change without notice.

This documentation may be used only in accordance with the terms of the Altigen Communications, Inc., License Agreement.

Altigen Communications, Inc.
670 N. McCarthy Boulevard, Suite 200
Milpitas, CA 95035 USA
Telephone: 888-Altigen (258-4436)
Fax: 408-597-9020 E-mail: info@altigen.com
www.altigen.com
Copyright © Altigen Communications, Inc. 2019. All rights reserved.



About This Guide

This guide is provided for the release of MaxCS Release 8.6.1. It describes the enhancements that have been included since MaxCS Release 8.5.1.

Requirements

For system requirements, refer to the *MaxCS All-in-One Deployment Guide*.

Installation Procedures

Release 8.6.1 supports:

- A new installation of MaxCS; follow the steps in the *MaxCS SoftSwitch Deployment Guide* or the Readme file.
- An upgrade from an earlier release of MaxCS; follow the steps in the *MaxCS Upgrade Guide*.

Overview of MaxCS 8.6.1 Enhancements

The changes that were included in release 8.6.1 are described in the following table.

MaxCS 8.6.1 Enhancements	
Callback from Queue: Reserved callbacks	In addition to having a separate workgroup handle return calls (referred to as Redirected Callback), you can now configure workgroups that handle their own return calls (Reserved Callback). See Configuring a Single Workgroup for Reserved Callback .
Callback from Queue: Streamlined setup	The Callback from Queue configuration GUI has been updated. These changes make the feature easier to configure.
MaxSupervisor: Hide logged out or Unstaffed agents	Supervisors can now hide logged-out agents and Unstaffed agents in the Agent State tab, via new options in the Configuration window. See MaxSupervisor: Hide Logged Out or Unstaffed Agents .
MaxSupervisor: Manually set agents to Ready or Not Ready	Supervisors can now manually set agents to <i>Ready</i> or <i>Not Ready</i> state. There is also a new Reason Code available for this action: <i>97 - Supervisor Override</i> . See MaxSupervisor: Manually Set Agents to Ready or Not Ready State .
MaxSupervisor: Auto-sorting no longer disabled	When the Agent State tab lists more than 200 agents, the Auto-sort feature will no longer be disabled. However, users may experience slight performance issues.
MaxSupervisor: New column "Workgroup Name"	Users can now show (or hide) a new column <i>Workgroup Name</i> in Agent View.
MaxSupervisor: New column "Time in Not Ready Reason"	Users can now show (or hide) a new <i>Time in Not Ready Reason</i> column in Agent View and in Agent State View. This column shows supervisors the

MaxCS 8.6.1 Enhancements	
	<p>current amount of time that an agent is in their current Not Ready Reason code. This duration will increment as long as the agent is not ready, even when the agent is in a personal call.</p> <p>Note that this duration will reset if the agent changes to a different Not Ready Reason code.</p>
Remote access to Advanced Queue Management	You can now remotely access the Setup button for <i>Advanced Queue Management</i> for workgroups.
OpenJDK bundled with AltiReport	AltiReport now comes with OpenJDK JRE (Zulu) instead of Oracle JRE 8.
Polycom SoundStation support	<p>The Polycom SoundStation 6000 conference phone now supports TLS 1.2 with firmware version 4.0.14.1580. You must update to this new firmware version, which is provided with MaxCS 8.6.1, in order to support TLS 1.2.</p> <p>Note that the model 7000 does not support TLS 1.2, and is still supported on firmware version 4.0.13.1445.</p>
Polycom VVX support	<ul style="list-style-type: none"> • The Polycom VVX450 model IP phone is now supported. • Polycom VVX Firmware version 5.9.3.2489 is now supported, and it is bundled with Release 8.6.1.
MaxAgent and MaxCommunicator call handling option	<p>In these client applications, there is a new call handling option.</p> <p>Under Configuration > Extension > Call handling, if users enable the <i>Automatically Answer after...</i> option, an additional checkbox <i>Workgroup calls only</i> lets users indicate whether personal calls will be automatically answered in addition to workgroup calls. If this checkbox is cleared, personal calls will automatically be answered following the same timing rule as workgroup calls.</p>
MaxAgent and MaxCommunicator Not Ready Reason code changes	<p>Agents can now change their Not Ready Reason code as needed, by right-clicking the <i>Not Ready</i> icon and choosing a different reason code.</p> <p>If the agent changes the Not Ready Reason code, it resets the <i>Time in Not Ready Reason</i> duration that is displayed in MaxSupervisor.</p>
Exchange Server support	This release supports Exchange Server 2019.
AltiReport	AltiReport now supports OpenJDK for Tomcat support and supports Tomcat version 8.5.43.
Updates to Altigen SDK	There are several updates to the Altigen SDK for Call Disposition Code, Not Ready Reason Code, and Account Code.

MaxCS 8.6.1 Enhancements

<p>Headsets supported with IPTalk</p>	<p>The following headsets are now supported with IPTalk.</p> <p>Plantronics</p> <ul style="list-style-type: none"> • USB SAVI models for wireless headsets • CS500 Series • USB Blackwire models 435, 3200/3210/3220 series, 700/710 series for corded headsets • Voyager 5200 UC • Encore Pro Plus Series with DA80 <p>Logitech</p> <ul style="list-style-type: none"> • H390 USB headset
--	--

Callback from Queue Configuration Enhancements

This release offers a new “Reserved Call Back” ability, where a single workgroup can both offer return calls and handle those calls.

In addition, the panels in MaxAdmin where you configure the Callback from Queue option have been updated, in order to make the setup process easier.

Remember to acquire all appropriate licenses and obtain any (optional) custom phrases for the callback process.

Important Considerations When Implementing Callback from Queue

- When implementing any callback from queue configuration, it is the responsibility of the Workgroup Supervisor or other manager to make sure that calls in the queue are handled properly before all agents in the workgroup log out for the day.

For the Reserved Callback feature, if all agents log out while there are callback calls in the queue, then those callback calls *will remain in the queue until an agent logs in*. Close monitoring of the queue will help you to avoid this scenario.

Using the option “Offer callback option only when the callback time is at least xx minutes before the end of the Target Workgroup’s business hours” can help you to reduce the risk of calls remaining in the queue after all agents have logged out for the day. In addition, make use of the “Set RNA Agent Log Out” and “Set RNA Agent Not Ready” options for the target workgroup.
- Note that callback calls are handled in the order in which they entered the workgroup queue, regardless of how soon they chose the callback option.

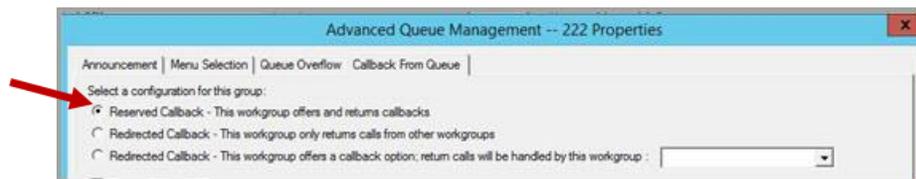
Configuring a Single Workgroup for Reserved Callback

To configure a workgroup that both offers a return call and then handles those return calls,

1. On the Workgroups page, click the workgroup that you want to configure. Switch to the *Queue Management* tab.
2. In the *Queue Control* group, choose **Advanced** and click the **Setup** button.



3. On the *Announcement* tab, configure the callback phrases.
4. On the *Menu Selection* tab, configure the IVR digit the user presses.
5. On the *Callback from Queue* tab, select the first option: **Reserved Callback – This workgroup offers and returns callbacks**. Making your selection will enable the other fields that you must configure.



6. Configure all options on that tab. The upper section has your “offer” options; the lower section is where you set the return call options. For explanations of each option, refer to the *MaxCS 8.6.1 Administration Manual*.
7. Select *Enable Callback Offer* near the top of the tab.
8. Click **Save**.

Configuring Two Workgroups for Redirected Callback

Configuring *Redirected Callback* is a slightly different process from setting up a *Reserved Callback*, in that you must configure two different workgroups to each perform their role. One group will offer the return calls; the other group will handle the return calls.

You must configure the target workgroup before you can configure the workgroup that will be offering a callback option.

Step A: Configure the Target Workgroup to Handle Return Calls

1. On the *Workgroups* page, click the **target** workgroup – the group that will handle the return calls. Switch to the *Queue Management* tab.
2. In the *Queue Control* group, choose **Advanced** and click the **Setup** button.



3. If this workgroup has already been set up to handle the return calls for another group, skip ahead to Step B. Otherwise,
 - a. On the *Callback from Queue* tab, select the second option, **Redirected Callback - This workgroup only returns calls from other workgroups**. Making your selection will enable the other fields that you must configure.



- b. Configure the fields in the *Return Call Options* section. For explanations of each option, refer to the *MaxCS 8.6.1 Administration Manual*.
- c. Click **Save**.

After you configure the 'offer' group, you will enable the Callback feature. You enable and disable the Callback feature from the *offering* workgroup.

Step B: Configure the Workgroup Offering the Callback Option

Next, configure the other workgroup, the one that will offer a callback option to callers waiting in the queue.

1. Click the **Offering** workgroup in the list and switch to the *Queue Management* tab.
2. Click the **Setup** button in the *Queue Control* group.
3. On the *Announcement* tab, configure the callback phrases.
4. On the *Menu Selection* tab, configure the IVR digit the user presses.
5. On the *Callback from Queue* tab, select the third option: **Redirected Callback – This workgroup offers a callback option; calls will be returned by this workgroup:**
6. In the adjacent field, pull down the menu and choose the 'target' workgroup that you configured in Step A. Only those workgroups that have already been configured to handle return calls will be included in this list.
7. Configure the options in the "Offer Options" group.
8. If you are ready for this group to begin offering return calls, select *Enable Callback Offer* near the top. Click **Save**.

Enabling/Disabling Callback from Queue

Once you have configured workgroups to offer and handle return calls, you can easily enable and disable the feature as needed.

To disable the Callback feature, clear the *Enable Callback Offer* option and click **Save**. For Redirected Callback configuration, this option is found on *Callback from Queue* tab of the offering workgroup.

Reserved Callback Reports

New reports are included in this release for Callback analysis.

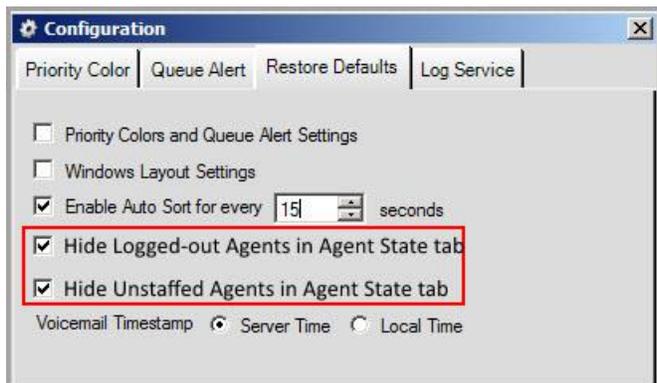
- (Agent) Reserve Agent Callback Summary Report (1207)
- (WG) Reserve Agent Callback Summary Report (2211)

MaxSupervisor: Hide Logged Out or Unstaffed Agents

Supervisors now have more options for the Agent State tab in MaxSupervisor.

In the configuration panel, on the *Restore Defaults* tab, there are two new options:

- Hide Logged-out Agents in Agent State tab and Agent View
- Hide Unstaffed Agents in Agent State tab and Agent View



These options allow you to not show logged-out agents and/or Unstaffed agents in MaxSupervisor, so that you can focus on agents who are actually logged in.

MaxSupervisor: Manually Set Agents to Ready or Not Ready State

Supervisors can now manually set agents to *Ready* or *Not Ready* state. There is also a new Not Ready Reason Code *97 - Supervisor Override*.

To set an agent to Ready or Not Ready manually,

1. In MaxSupervisor, in either Workgroup View or in Agent View, [\[editor's note: Agent view implementation is pending\]](#), right-click the entry of the specific agent.
2. From the menu, choose either **Set Agent To Ready** or **Set Agent To Not Ready**.
3. If the system has been configured for Not Ready Reason Codes, then you can choose a reason code for this change. Use a new code, *97 – Supervisor Override*, to indicate that you made the change manually.

MaxSupervisor: Auto-sorting No Longer Disabled on Agent State Tab

In previous releases, while more than 100 agents are listed in the Agent State tab, a message would indicate that the auto-sort function has been disabled. In Release 8.6.1, auto-sorting is no longer disabled. You may see a message indicating that displaying more than 100 agents may result in performance issues.

Release 8.6 Enhancements

This section describes the changes that were introduced in Release 8.6.

VMWare Support

Beginning with Release 8.6, MaxCS supports VMWare Release 6.7.

Polycom VVX Firmware Auto-Upgrade Enhancements

Starting in Release 8.6, administrators can now control firmware upgrades on individual VVX Polycom phones.

The individual VVX extension's **Update firmware to...** setting is no longer automatically disabled. You can choose to enable or disable each VVX phone's update option. (**PBX > Altigen IP Phone Configuration** on the *Polycom* tab)



MaxCS now has an **Apply To** button, so that you can apply the enable/disable option to multiple Polycom VVX extensions.

Backup Program Enhancements

For better performance and to reduce the amount of disk space used by backup logs, the Backup process no longer includes Polycom log files.

MaxCS Client Upgrade Enhancements

This release includes two enhancements to the MaxCS client upgrade process:

- MaxCS clients now will require an upgrade to a new release only when the new version has known incompatibilities with the previous release.
- MaxCS clients can now be upgraded from an external URL. This lessens the impact on the bandwidth of the MaxCS server.

Upgrading Clients via a URL

Administrators can now specify a location for the MaxCS client upgrade installation files, instead of having MaxCS clients retrieve upgrade files from the MaxCS Server. You will specify this download location within MaxAdmin.

Some considerations:

- If you configure the download URL in MaxAdmin, then you must manually sync the installation files on the web server that hosts that URL. This must be done with each future software upgrade. MaxCS will verify the version of the software, the system will push the correct version of installation files to the MaxCS client.
- If you do not configure a download URL in MaxAdmin, then the MaxCS clients will still download the installation files from the MaxCS server.
- Administrators must log in under the “super admin” account in order to access this new field.

To configure this external download location,

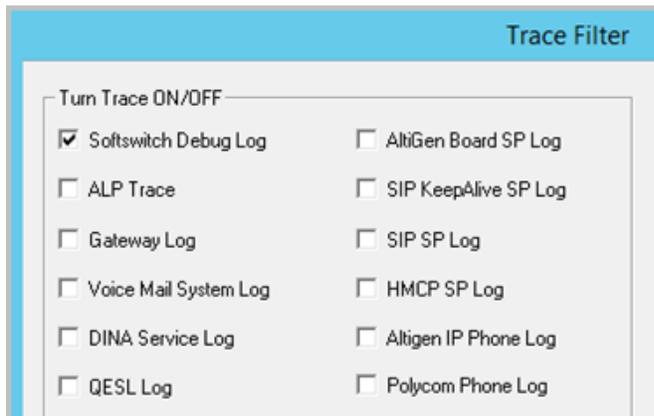
1. In MaxAdmin, select **System > System Configuration > General**.
2. Enter the URL in the new field, **MaxCS Client Download URL**. Save your changes.

Trace Enhancements

In this release, the log process has been streamlined to run more efficiently. In addition, several new traces have been added:

- SIP KeepAlive SP Log
- Polycom Phone Log
- QESL Log

You reach these trace settings by choosing **Diagnostics > Trace**.



Other notes:

- The *H323 SP log* has been removed; it is no longer relevant in the newer releases of MaxCS.
- The *IP Phone Service log* has been renamed to *Altigen IP Phone log*.

Midnight Task Scheduling Enhancements

You can now set a custom schedule for nightly MaxCS tasks, through a registry entry.

To indicate the time that you want the MaxCS nightly tasks to begin,

1. Open the registry on the MaxCS server.
2. Add a new entry:

```
HKEY_LOCAL_MACHINE\software\Wow6432Node\Altigen Communications, Inc.\AltiWare\MidnightTaskTime
```

3. The default time, 3:00 AM, is denoted as 03:00:00. This time will be used by default if you do not specify a different time, or if the value you enter is invalid.

Enter the time you want the task to start and save the changes.

If you prefer, you can add this new registry entry via a command line. For example, to add an entry to this registry for the tasks to start at 2:15 AM, enter:

```
reg add "HKEY_LOCAL_MACHINE\software\Wow6432Node\Altigen Communications, Inc.\AltiWare" /v MidnightTaskTime /t reg_sz /d 02:15:55
```

Exception Routing

In earlier releases, you could create holiday routing rules for full days, and you could create business hours for specific days of the week and weekends.

In this release of MaxCS, we have expanded your ability to route calls. MaxAdmin has a new tab, *Exception Routing*. Exception routing rules can be entered for a specific period of a specific day. One example of this would be for a company meeting lasting 1 hour on a specific date. Or perhaps a company training session that lasts one morning of a specific date.

Considerations:

- You can add multiple exception routing rules, even for the same date and time.
- Exception routing rules can have one or more DNIS numbers.

Routing Precedence

- Exception routing rules have precedence over Holiday Profile definitions.
- Holiday Profile definitions have precedence over Business Hours settings.

Creating Exception Routing Rules

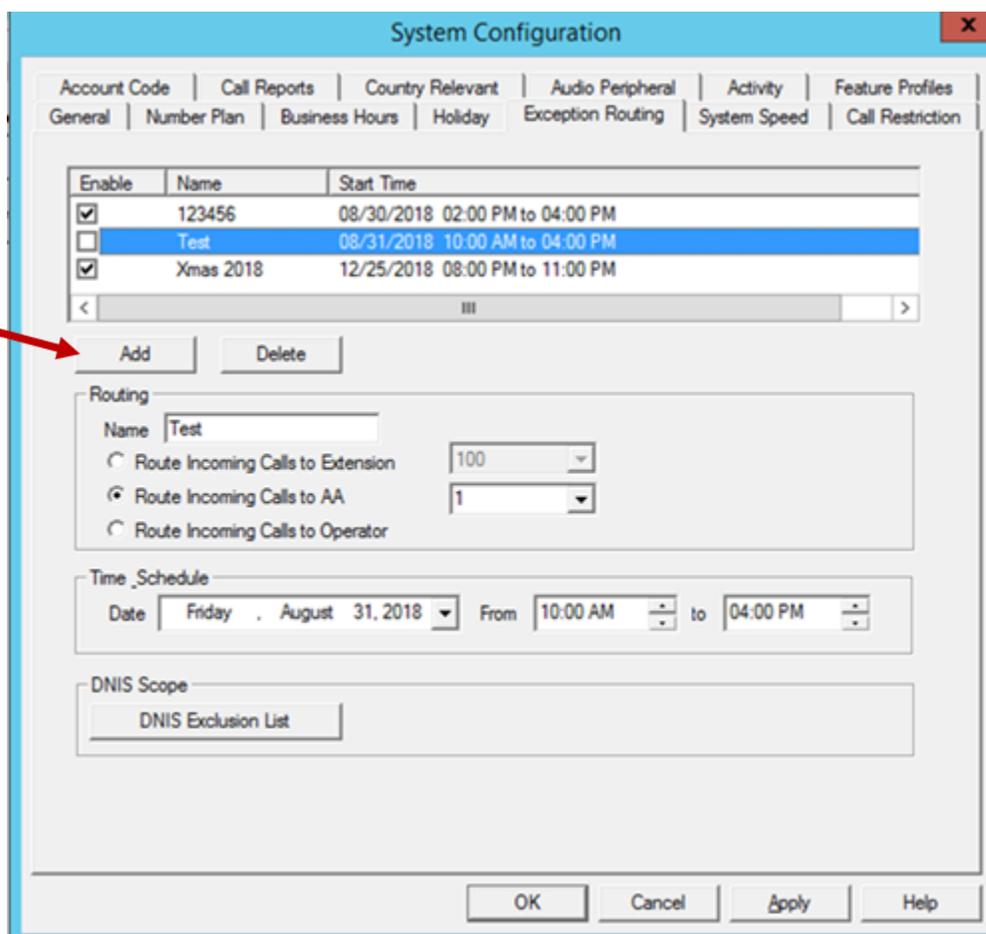
To create a new routing rule,

1. In MaxAdmin, select **System > System Configuration > Exception Routing**.

2. This tab shows you routing rules that have already been configured.

To add a new rule, click the **Add** button below the list of rules.

3. In the *Routing* section below the table, enter a name for this rule. We recommend that you use a unique and descriptive name that will make it easy to identify among other rules.



System Configuration

Account Code | Call Reports | Country Relevant | Audio Peripheral | Activity | Feature Profiles
 General | Number Plan | Business Hours | Holiday | Exception Routing | System Speed | Call Restriction

Enable	Name	Start Time
<input checked="" type="checkbox"/>	123456	08/30/2018 02:00 PM to 04:00 PM
<input type="checkbox"/>	Test	08/31/2018 10:00 AM to 04:00 PM
<input checked="" type="checkbox"/>	Xmas 2018	12/25/2018 08:00 PM to 11:00 PM

< Add Delete >

Routing

Name:

Route Incoming Calls to Extension

Route Incoming Calls to AA

Route Incoming Calls to Operator

Time Schedule

Date: From: to:

DNIS Scope

OK Cancel Apply Help

4. Choose a routing option:

- Route Incoming Calls to Extension – Enter or select the extension for calls during this period.
- Route Incoming Calls to AA – Select the AA for calls during this period
- Route Incoming Calls to Operator – Routes calls to the Operator during this period.

5. Set the schedule for this routing rule by selecting the date and then specifying the beginning and ending of this period.
6. (Optional) If you want to exclude certain numbers from this routing rule, click **DNIS Exclusion List**. In the next panel, you can add and remove DNIS numbers to / from the Exclusion list. Numbers that you place on the Exclusion list will ignore the rules in this routing rule.
7. Save your changes.

To enable or disable an individual exception routing rule, check or clear its *Enable* checkbox. To delete a routing rule, select the rule and click **Delete**.

OpenJDK Support

Currently, MaxCS AltiReport relies on 32- or 64-bit Oracle 8u101 JREs for Tomcat 8.5. However, since this is an old version of Java JRE, you may want to use an updated JRE. Because JDK 8 may not be supported after January 2019, you can download an OpenJDK JRE to run Tomcat 8.5.

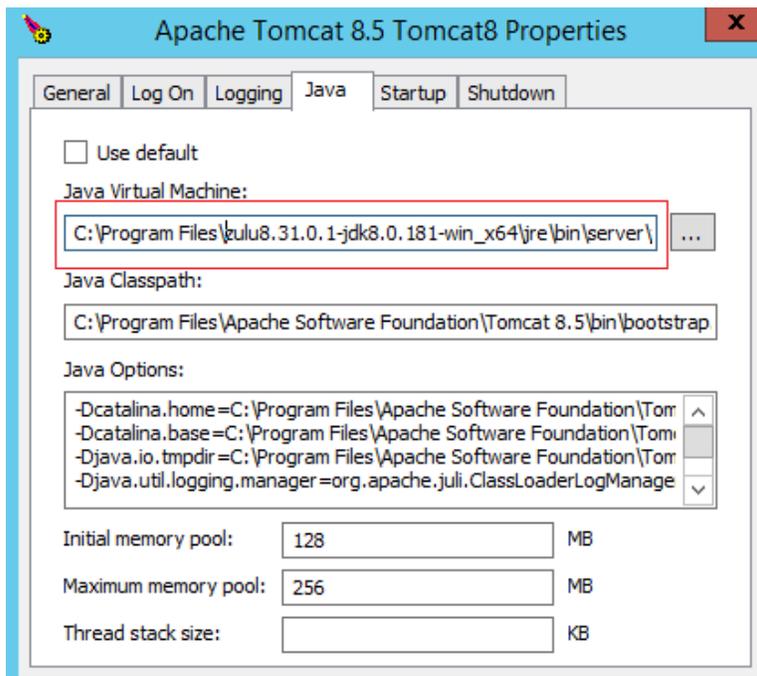
To run Tomcat using the OpenJDK JRE,

1. Download the latest Zulu build for OpenJDK 8. The website can be found here:
<https://www.azul.com/downloads/zulu/zulu-windows/>
2. Depending on the system, you will need to either download the most up-to-date 32-bit x86 or 64-bit x86 version of Java Version 8. Download the .zip and unzip the JDK to a folder.

8	Server	2016 2016-Nano 2012R2 2012 2008R2 64-bit x86	8u181	Checksum (MD5): 2de0418ea2d66a3c6a150a7f4ac4db44 JSE 8 Certificate	DOWNLOAD .ZIP
	Client	10 8.1 8 7 64-bit x86		Checksum (MD5): 21088dfd884ca42b999a1c2e890ac086 JSE 8 Certificate	DOWNLOAD .MSI
8	Server	2016 2016-Nano 2012R2 2012 2008R2 32-bit x86	8u181	Checksum (MD5): fd968d4ed2b8bf25a43fbb9d05a0664a JSE 8 Certificate	DOWNLOAD .ZIP
	Client	10 8.1 8 7 32-bit x86			

If Tomcat and AltiReport are already installed on the server, follow these steps:

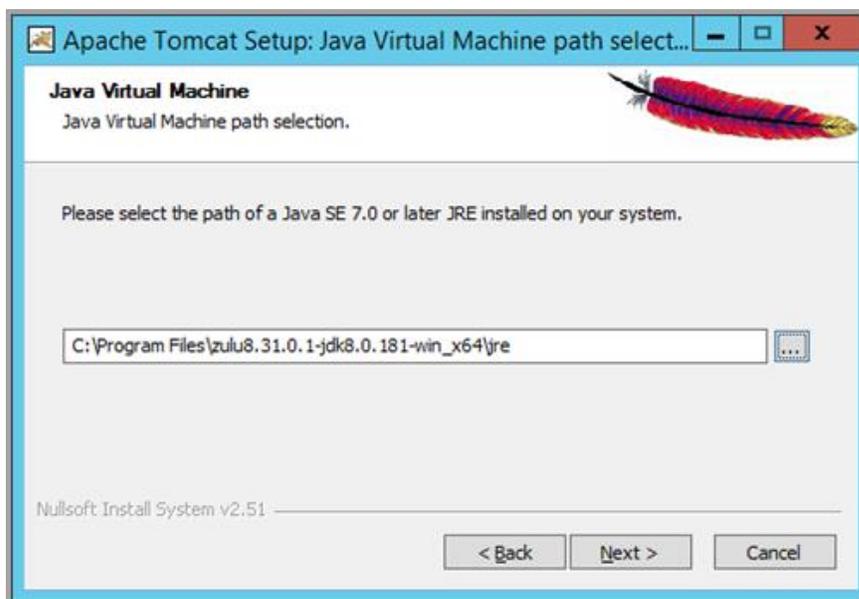
1. Open the Tomcat configuration. Switch to the *Java* tab.



2. Change the *Java Virtual Machine* entry to point to the *jvm.dll* file in the OpenJDK folder that was unzipped. The *jvm.dll* file can be found in `\jre\bin\server\jvm.dll`.
3. Apply the change and restart the Tomcat services.

If Tomcat and Altireport have not been installed on the server, follow these steps:

1. In the Tomcat installation, proceed with a normal installation until you reach the *Java Virtual Machine path* selection.



2. It will default to any Oracle JRE installations on the system. Change the directory to the JRE directory inside the OpenJDK folder.

3. Proceed with the rest of the installation. The Tomcat Java Virtual Machine will be set to run using the OpenJDK jvm.dll as part of the installation process.

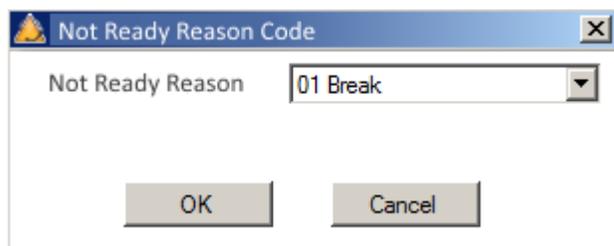
Not Ready Reason Codes

You can now configure various codes that agents can use to specify why they are switching to *Not Ready* status. You can make reason codes mandatory or optional.

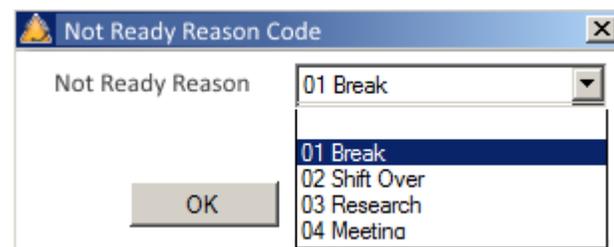
1. In MaxAdmin, choose **Call Center > Reason Code Configuration**.
2. Click the **Agent Not Ready Reason** tab.
3. In the table, enter the various reason codes that you want to present to your agents, one per field. For example, you might include terms such as Break, Shift Over, Meeting, Research, Training.
4. If you want to require agents to specify reason codes, then check the option *Not Ready Reason Code Required*. To make entry of reason codes optional, leave the checkbox cleared. Click **OK**.

Not Ready Reason Codes in MaxAgent

If you select the option *Not Ready Reason Codes Required*, then agents will not be able to set their status to *Not Ready* until they enter a code. A pop-up will open if they click to change their status. If they click **Cancel**, they will see a warning message and will remain in *Ready* state.



If you do not select the option *Not Ready Reason Codes Required*, then the pop-up will still open, but they will have a blank option in the pulldown menu that they can choose instead of a reason code.



The Not Ready Reason Code is a system wide option so if the required box is checked (which is optional) you will no longer be able to use the #91 (Not Ready) from your phone.

Not Ready Reason Codes in MaxSupervisor

In MaxSupervisor, users will see the *Not Ready Reason Code* in the Agent State display. The code will also appear in the Agent View and Worgroup View > Agent State views.

Reports Which Include Not Ready Reason Codes

Not Ready Reason codes will appear in the Agent Activity Event Report.

- The state (Not Ready) will appear in an Activity Type column
- A new column shows the Not Ready Duration
- A new Reason column shows the reason for each Not Ready event.

Call Disposition Codes

Admins can now set up custom Call Disposition codes. These codes are typically descriptions of the final outcome of the call, and are a simple way to label or categories calls.

For example, a Technical Support organization may choose to set up Call Disposition codes of *Resolved*, *Researching*, *Feedback*, *Follow up*, and so on. A service organization may set up Call Disposition codes such as *Appointment Scheduled*, *Product Question*, *Service Inquiry*, and so on.

Please take the following behavior into account when designing and implementing Call Disposition Codes:

-  • Be aware that Disposition Codes **cannot be removed once they are configured**.
- In order to use Disposition codes in VRM Pro, you must have installed VRM Pro 8.6.1 with the CDR and application data being **stored in the same database**.
- We strongly recommend that you do not change Disposition Codes once they are configured, because this will skew any report data. You should add new codes rather than change existing codes.
- Call Disposition codes can be made mandatory or optional for individual workgroups.
- During a call, agents can change a Disposition Code if they have already specified one. The last code the agent chooses will be retained.
- For internal workgroup calls, if the agents enter different Disposition codes for the call, the code that was entered **last** will be stored. In other words, If Agent A and Agent B are on a workgroup call, and Agent B enters a Disposition code after Agent A enters one, whichever code Agent B enters will be saved.

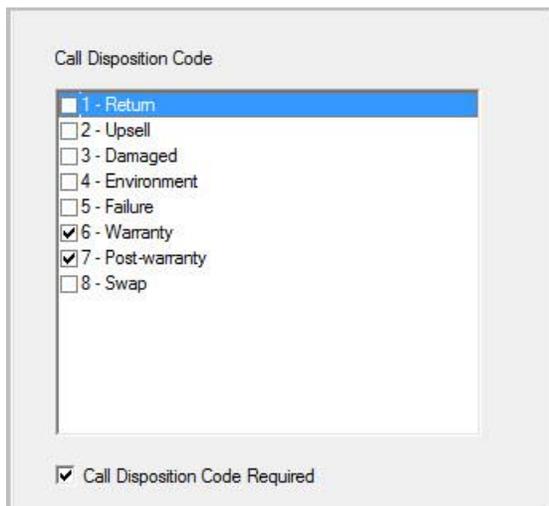
Creating Call Disposition Codes in MaxAdmin

1. In MaxAdmin, choose **Call Center > Reason Code Configuration**.
2. Click the **Call Disposition** tab.
3. In the table, click **Add**, and then enter the label for this disposition code. Click **OK**.

Configuring Call Disposition Code Options for a Workgroup

You can specify which Call Disposition codes apply to each workgroup. You can also specify, for each workgroup, whether Disposition Codes are required or optional. If you want to require Disposition Codes, you can require them for inbound workgroup calls, for outbound workgroup calls, or for both.

1. Open the Workgroup Configuration panel. Select the workgroup.
2. Click the *Call Disposition* tab.
3. Select the codes that you want to make available for that workgroup (up to 64).
4. If you want to enforce Disposition codes, first check the option **Call Disposition Code Required...** Then select whether you want to enforce codes for inbound, outbound, or both types of workgroup calls. Click **Ok**.



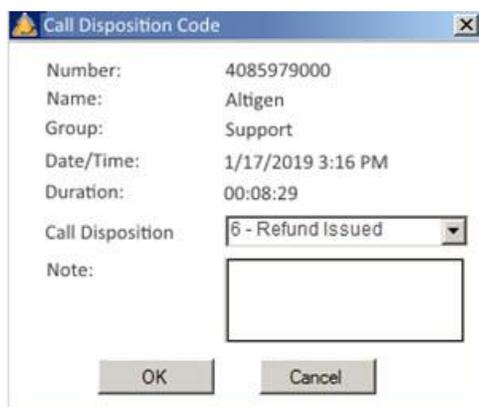
Considerations

Before you enable the *Call Disposition Code Required* option, be aware of the following behavior.

- Agents who do not enter a Disposition Code for a call **will automatically be set to *Not Ready***. This will leave you with fewer agents available to handle incoming calls. For example, if you have 3 workgroup agents logged in and one of those agents has not entered a Disposition Code for a call and has been set to *Not Ready*, that leaves your workgroup with only two agents able to handle incoming calls.
- Forcing the entry of a Disposition Code will prevent the system from presenting agents with new **incoming workgroup calls**. However, agents can ignore the Disposition Code popup and **place outgoing calls**. In other words, MaxCS will not prevent an agent from placing outbound calls. Note that you can run report 1305 to detect agent *Not Ready* status with a reason code of *Disposition Code*.

How Agents Enter Disposition Codes in MaxAgent When Codes are Required

When a workgroup call is disconnected, the *Disposition Code* dialog opens to allow the agent to select a code for this call.



The agent can also enter any appropriate notes for this call.

Notes:

- The popup will remain in the foreground until the agent enters a code.



- The **Cancel** button in this popup will be disabled, because the agent must select a code.
- **MaxCS will not present the agent with another workgroup call until a Disposition Code has been entered in MaxAgent.** Personal calls to the agent will still come in, even while incoming workgroup calls are blocked.
- The agent cannot close MaxAgent normally if a Disposition Code popup remains open.
- If the agent state becomes available (after any wrap-up interval has passed), MaxCS sets the agent's state to *Not Ready*, with a Not Ready Reason Code of *Disposition Code*. This allows supervisors to determine whether agents are avoiding calls by not entering a required Disposition Code.
- If the MaxAgent application goes down mid-call for some reason, Disposition Codes for the interrupted call will no longer be required when the agent re-opens MaxAgent. The Call Disposition Codes feature requires that MaxAgent be running during calls.

How Agents Enter Disposition Codes When They are Not Required

Agents can still enter Disposition codes, even if the workgroup does not require codes to be entered. Agents can right-click the call and select Call Disposition Code from the menu.

Reports That Include Call Disposition Code Data

New reports have been added:

- Call Disposition Code Summary Report by Agent (1305)
- Workgroup Call Disposition Code Summary report (2320)
- Call Disposition Code Summary Report by DNIS (3301)

The following reports also include Disposition Code data:

- The Agent Call Detail Report (1102)
- Workgroup Call Detail Report (2101)
- DNIS Call Detail Report (3101)

Call Disposition Code Data in CDRs

The following tables have been updated for Call Disposition Code data:

CDRMAIN Table

- DispositionCode (int, null): new column
- DispositionDescription (varchar(64), null): new column
- DispositionNote (varchar(256), null): new column

DISPOSITIONCODE: New Table

- Version (int, not null)
- NodeID (int, not null)
- Code (int, not null)
- Description (varchar(32), not null)
- StartTime (int, null)

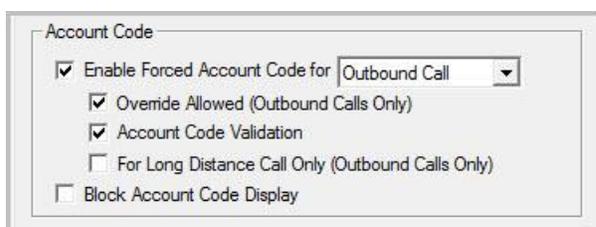
- EndTime (int, null)
- StartTimeGMTOffset (int, null)
- EndTimeGMTOffset (int, null)
- RevisionID (int, not null)

Account Code Enhancements

You can now require account codes for inbound calls in addition to outbound calls. You configure this on an extension basis.

To configure the account code settings,

1. Open the *Extension Configuration* panel and switch to the *Restriction* tab.
2. For the *Enable Forced Account Code* setting, select an option:
 - Outbound Call (which is the default setting)
 - Inbound Call
 - Both – this option forces agents to enter account codes for both incoming and outbound calls
3. Select any of the other options:
 - Override Allowed – allows the agent to override account code entry for outbound calls
 - Account Code Validation – validates the account code entered
 - For Long Distance Calls Only – forces account code entry only for long-distance outbound calls
 - Block Account Code Display – hides the account code list; the agent must enter the code manually
4. After selecting all options, click **OK**. You can also use the **Apply To** button to apply this setting to other extensions.



When account codes are required, agents will see the Account Code pop-up for incoming calls.

When account codes are not required, agents can still enter a code for a call by right-clicking the call and selecting Account Codes.

Account Codes in Reports

In the Agent Call Detail Report (1102) and the Workgroup Call Details (2101) report, you can now search by Account Code.



Operational Notes and Limitations

This section mentions operational limitations and provides workarounds to any known issues. In addition to this section, you should refer to the Readme files on your installation media for any other known limitations with this release.

- MaxOutlook display issues – If the main MaxOutlook window does not appear, the issue may be a result of some Microsoft API changes. To fix this issue, in Outlook choose **File > Options > General**. In the User Interface settings, choose the *Optimize for compatibility* option. Restart the application and it should now use the old Windows API.

Altigen Technical Support

Altigen provides technical support to Authorized Altigen Partners and distributors only. End user customers, please contact your Authorized Altigen Partner for technical support.

Authorized Altigen Partners and distributors may contact Altigen technical support by the following methods:

- You may request technical support on Altigen's Partner web site, at <https://partner.altigen.com>. Open a case on this site; a Technical Support representative will respond within one business day.
- Call 888-ALTIGEN, option 5, or 408-597-9000, option 5, and follow the prompts. Your call will be answered by one of Altigen's Technical Support Representatives or routed to the Technical Support Message Center if no one is available to answer your call.

Technical support hours are 5:00 a.m. to 5:00 p.m., PT, Monday through Friday, except holidays.

If all representatives are busy, your call will be returned in the order it was received, within four hours under normal circumstances. Outside Altigen business hours, only urgent calls will be returned on the same day (within one hour). Non-urgent calls will be returned on the next business day.

Please be ready to supply the following information:

- Partner ID
- Altigen Certified Engineer ID
- Product serial number
- AltiWare or MaxCS version number
- Number and types of boards in the system
- Server model
- The telephone number where you can be reached