



# **MaxCommunicator™**

## **Manual**

MAX Communication Server  
Release 9.0.1

April 2021

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Altigen Communications, Inc.  
670 N. McCarthy Boulevard, Suite 200  
Milpitas, CA 95035  
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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MAX Communication Server, MaxAdministrator, MaxCommunicator, MaxAgent, MaxSupervisor, MaxInSight, MaxOutlook, MaxCall, Enterprise Manager, AltiServ, AltiLink, AltiConsole, VRPlayer, IPTalk, Alti-Mobile Extension, InTouch Dialer, and AltiReport are trademarks or registered trademarks of Altigen Communications, Inc.

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# About MaxCommunicator

MaxCommunicator is call management software for the general desktop PC user. It runs with the MAX Communication Server ACM system. MaxCommunicator users can access, configure, and perform several of the system's PBX functions directly from the desktop, including call handling, call forwarding, voice messaging, extension monitoring, conferencing, and One Number Access.

This manual is provided for the *desktop* MaxCommunicator client. A separate guide is provided for the new version of the application, MaxCommunicator Web.

## Outlook/Outlook Express Support

MaxCommunicator supports Microsoft Outlook 2010, 2013, and 2016 (32-bit only), allowing you to obtain phone numbers to dial from a Microsoft Contact list. MaxCommunicator also lets you see the incoming calls that have a matching record in the Contact list.

You must set up the Outlook Contacts list prior to using this feature.

## Licensing

The following Altigen licenses are required:

- MaxCommunicator requires a MaxCommunicator seat license for each user, or a MaxCommunicator session license.
- The IPTalk feature requires an IPTalk license for each user, or an IPTalk session license.
- MaxCall requires a MaxCall seat license for each user or a MaxCall session license.
- An optional Polycom Advanced Features license is available for using special features of various Polycom phones with MaxCommunicator.

A system administrator can assign and verify seat licenses in MaxAdministrator by selecting **License > Client SEAT License Management** from the main menu.





# Installation

The client system must meet the following minimum requirements.

Operating systems supported:

- Windows 10
- Windows 8.1 (64-bit)

System requirements:

- IBM/PC AT compatible system
- Microsoft .NET 4.5 or higher
- 2GHz CPU or faster
- 1GB available hard drive disk space
- 1GB RAM
- SVGA monitor (1024 x 768) with 256 color display or better
- Keyboard and mouse
- A sound card in the computer, if using IPTalk
- MAXCS 9.0.1 must be running on a server accessible to this client

## Pre-Installation Checklist

Before installing MaxCommunicator, make sure the following is done:

- MAXCS 9.0.1 has been installed on the system server.
- TCP/IP is enabled on both machines.
- The client is able to connect to the server on the network.
- The person installing MaxCommunicator has local administrator rights on the client computer.
- The extension affiliated with the client computer has a MaxCommunicator Seat License assigned to it, or there is a MaxCommunicator Session License installed in the MAXCS system.

## Installing MaxCommunicator

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

1. Close all Windows applications.
2. From the MAXCS 9.0.1 installation media, open the *MaxCommunicator* folder and run the **Setup** program in that folder. Follow the step-by-step installation instructions as they appear on the screen.

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

## Uninstalling MaxCommunicator

1. From the Windows **Start** menu, select **Control Panel > Add/Remove Programs > MaxCommunicator** to uninstall MaxCommunicator.
2. Click **Remove**, and respond to any additional prompts.

## Automatic Upgrade

Each time you start up MaxCommunicator, a comparison is made with the version of MAX Communication Server that is running on the server. If your version of MaxCommunicator is incompatible with the version of MaxCS on the server, then you will be prompted to upgrade. If you automatically upgrade, the MaxCommunicator startup is terminated and a software upgrade session is started. Restart MaxCommunicator to run the newer version.

**Note:** For remote MaxCommunicator users outside the firewall, TCP port 10050 is required to be open to allow automatic upgrade. Automatic upgrade over the Internet requires the sending of 15 MB files over the WAN, which may take some time, to perform the automatic update.

**Note:** For UC-enabled users, if you have the Skype for Business client docked while you perform an auto-upgrade, the MaxCommunicator window will disappear briefly during the process, showing you only the Skype for Business client.

## Downgrade Procedure

1. Go to **Control Panel > Add/Remove Programs** and remove MAXCS 9.0.1 and ALL OTHER 9.0.1 client applications (such as MaxAgent, MaxOutlook, MaxSupervisor, AltiConsole and CDR Search).
2. Reboot your system.
3. Install the earlier software.



# Getting Started

Start MaxCommunicator from the Microsoft Windows **Start** menu, by choosing **Start > All Programs > MaxCommunicator > MaxCommunicator**.

## Logging In

1. If this is your first time logging into this MAX Communication Server system, enter the system server's IP address or the name of the system server you will be using. To obtain the server name or IP address, ask your system administrator.

The image shows the MaxCommunicator login window. It has a light blue and white background with a wavy pattern. At the top center is the Altigen Communications logo, which consists of a blue triangle with a white 'A' inside. Below the logo, the text 'MaxCOMMUNICATOR' is displayed in a large, blue, serif font. Underneath the title, there are three input fields: 'Server Name:' with a dropdown menu showing '10.10.0.8', 'Extension:' with the text '237', and 'Password:' with four dots. Below these fields are two checkboxes: 'Enable IPTalk softphone' and 'Always save password'. At the bottom right, there are two buttons: 'Sign in' (green) and 'Cancel' (blue).

(Subsequently, when you log in, you'll see the IP address in the **Server Name** field. You may use the drop-down list to select a different server, if more than one server is available.)

2. Enter your **Extension** number and **Password** assigned to your phone. (You can also log in as a workgroup or a huntgroup.)

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

**Note:** If you exceed the maximum number of failed login attempts (this threshold is set by your administrator) your login will be disabled for from 1 to 24 hours (depending on the duration set by your administrator).

3. If your extension is an IP extension and you will be using a headset, check the **Enable IP Talk softphone** option. (An Altigen IP Talk license must be assigned to your extension.)  
(Even if you do not have an IP *phone*, as long as your extension is set up as an IP extension by your system administrator, you can check the **Enable IP Talk softphone** check box.)  
See "Logging In Remotely" on page 8 for more information on using IP extensions remotely.
4. Click **Sign In** or press the Enter key. To back out of signing in, click **Cancel** or press the **Esc** key. (If your current password does not meet the new MaxCS 9.0.1 password requirements, you will be prompted to change it.)

## Version Mismatch Dialog Box

If your version of MaxCommunicator is incompatible with the version of MaxCS on the server, you are prompted for upgrade permission when you try to log in. If you agree to upgrade, the MaxCommunicator startup is terminated and a software upgrade session is started. Restart MaxCommunicator to run the newer version. (See "Automatic Upgrade" on page 4 for more details.)

## Logging In Remotely

You can use MaxCommunicator from a remote location if

- MaxCommunicator is installed on your remote computer
- Your extension is configured as an IP or mobile extension by your system administrator
- You have an Altigen-certified IP phone or are using IP Talk

Consult your system administrator or authorized Altigen Partner for details on obtaining this equipment.

All the call handling functions are the same as when you log in locally, with the exception of the ability to configure One Number Access. You can pick up voice mail, forward local business office phone calls to another site such as a home desktop computer, and even receive phone calls as you would at the office.

To log in from a remote location,

1. If you connect to the Internet through a modem connection, establish a connection to your internet service provider (ISP).
2. Log in using your **Extension** and **Password** as usual.
3. If you will be using a headset plugged into your computer, check the **Enable IPTalk softphone** check box. (An Altigen IPTalk license must be assigned to your extension.)
4. Click **OK**.

## IP Extensions Using IPTalk

An Altigen-certified USB headset system is recommended for IP extensions using IPTalk (your phone system administrator or Altigen dealer can recommend headsets).

**Important!** You can run only one instance of MaxCommunicator with IPTalk per system.

To make and receive calls using IPTalk,

1. Connect your headset to your system.
2. Use the MaxCommunicator dialing and call accepting functions as usual to make and receive calls.

## When the Connection Is Lost

When the connection with the phone server is lost, a message asks if you want to connect again. Click Yes to restore the connection without having to go through the log-in process again.

If your system administrator has enabled the 'Redirect' feature for MAXCS, when MaxCommunicator detects that its connection with the MAXCS server has been lost, you will be offered two options:

- If you choose **Reconnect to Main Server**, then the client will try to re-establish its connection with the main server. If it cannot reconnect, it will prompt you to redirect the connection to the alternate server.

- If you choose **Redirect to Alternate Server**, then the client will establish a connection with the alternate server. Once your administrator has brought the main server back up, you will be prompted to switch the client's connection back to the main server.

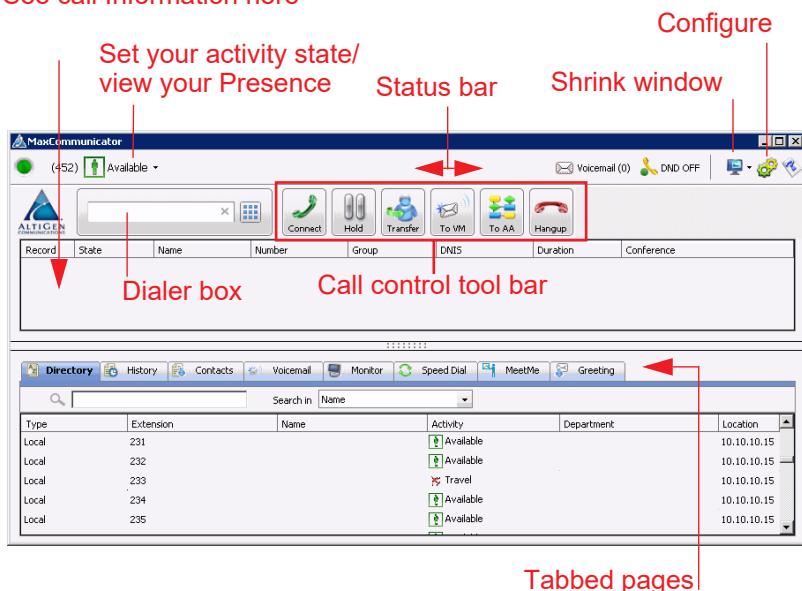
## Overview of the Main Window

Once you log in to MaxCommunicator, the main window appears, providing tools to manage and monitor calls, and to facilitate management of your personal contacts.

**Note:** If your account is configured for Unified Communications (UC), then your window will look a bit different. See the next chapter, "Using MaxAgent With Unified Communications" on page 1 for details.

You can customize the MaxCommunicator display: select the theme; the toolbar buttons, tabs, and columns you need and their order of appearance; the sort order; and so on. See "Customizing the Display" on page 18.

See call Information here





If you checked **Enable IPTalk** when you logged in, the right side of the toolbar looks a little different:



Click the Down arrow to access the **Mute** button, the **Volume** button, and the **Arrange Window** button that lets you shrink the window.

## Click a Number to Make a Call

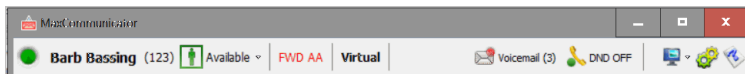
All phone numbers become underlined when you pass the cursor over them. Click an underlined number to make a call to that number.

Right-click a call to see a context menu.

## Status Bar

From the status bar you can do the following:

- Change your activity state from the drop-down list (see "Changing Activity Status" on page 15).
- If you have configured Call Handling to forward all calls, see the target destination. For example:



- See the number of unopened voicemail messages.
- Turn Do Not Disturb (DND) on and off (see "Turning Do Not Disturb On and Off" on page 16).
- If you're using IPTalk, you can mute the call (using the **Mute** toggle button) and control the volume using the volume control.

Mute button (toggle) →  ← Volume control

- Shrink MaxCommunicator to a single tool bar and restore it to normal size by selecting from the drop-down menu.
- Configure MaxCommunicator (see “Configuring MaxCommunicator” on page 63).
- Open help.

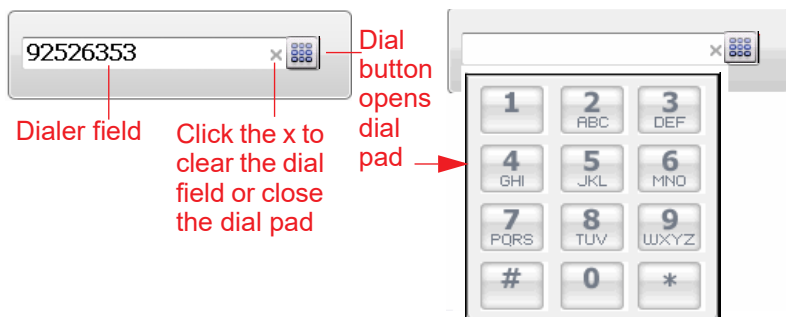
## Toolbar Buttons

Toolbar buttons provide single-click functions to connect, hang up, transfer, send to voicemail, hold, conference, send calls to **AA** (auto attendant), flash, record, redial, intercom, and enter account code.



You can choose the buttons you want and the order in which you want them. See “Customizing the Display” on page 18.

The **Dialer** field and **Dial** button are also in the toolbar. Click the **Dial** button to pop up the dial pad.



## Call Information Panel

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

**Record** — shows when a call is being recorded

**State** — the state of the currently active call:

- **AA** — the call is being transferred to an auto attendant
- **Busy** — callee is busy or not available
- **Call Pending** — the call is placed into a workgroup queue
- **Conference** — the call is in conference
- **Connect** — the call is connected
- **Dial Tone** — a dial tone is present, and MaxCommunicator is ready to dial out
- **Error** — receipt of an error tone
- **Hold** — the call is on hold
- **Hold Pending** — the call is being transferred or conferenced
- **Idle** — the extension is not in use
- **Play VM** — playing voice mail (The **Duration** field displays the duration of the voice mail as it plays. The duration display does not reflect fast forward or fast backward.)
- **Record** — recording an introductory message
- **Ringback** — caller sees this state while the callee's phone is ringing
- **Ringling** — an outgoing call is ringing another phone or an incoming call is ringing your phone

**Name** — the name of the person on the other end of the call, if available

**Number** — the phone number at the other end of the call

**Group** — your workgroup number for this call

**DNIS** — the DNIS number, if appropriate

**Duration** — duration of the call

**Conference** — indicates the conference host

**TrustID Data** — the TrustID parameters configured for your company

**TrustID Status** — the assessed authentication for your call

**To hide a column** you don't want to see, right-click a column heading and uncheck the column.

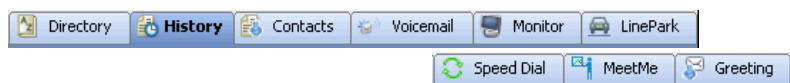
**To rearrange columns**, click and drag a column heading to where you want it.

## Accessing a Context Menu for a Call

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

## Tabbed Pages

Nine tabbed pages are available on the bottom half of the MaxCommunicator screen: Directory, History, Contacts, Voicemail, Monitor, Line Park, Speed Dial, MeetMe, and Greeting. (If you have enabled MaxCall, the MaxCall tab is available also. MaxCall requires a license and is discussed in “Using MaxCall” on page 83.)



**Directory** — Lists the extensions of people at the company. Columns include: Type (local, remote), Extension, Name, Activity/Presence, Department, Location.

**Note:** In order to see activity for remote extensions on the Directory tab, you must add those remote extensions to your Monitor list by following the steps described in “Choosing Extensions to Monitor” on page 48.

**History** — A history of your incoming, outgoing, and missed calls. Columns include: Direction (incoming, outgoing, missed), Number, Name, Date/Time, Duration, DNIS, Group, and Note.

**Contacts** — A list of contacts you have added to your MaxCommunicator. Columns include: Name, Company, Business Phone, Mobile Phone, Email Address, IM Address, Home Phone.

**Voicemail** — A log of unopened and opened voice mails left at your extension. Columns include: Type, Number, Caller Name (if available from extension information or from an external database), Date/Time, Duration, and Note. See “Dealing with Voice Mail” on page 45.

**Monitor** — A list of extensions you have chosen to monitor. Columns include: State, Extension, Name, Activity, DND/FWD, Caller Name, Number, Department, Location, DNIS, and Duration. See “Monitoring the Activity of Other Extensions” on page 48.

**Line Park** — Shows calls parked for line park groups that you are a member of. You can pick up a parked call from the **LinePark** tab. Columns include: Park (the Park ID), Extension, Caller Name, Number, DNIS, and Duration.

To park a call in MaxCommunicator, click the **Flash** button on the call control tool bar (you must customize your tool bar to display the **Flash** button), enter #41 (system call park) or #31 (personal call park) in the dialer field, then click the **Connect** button on the call control tool bar.

**Speed Dial** — A list of speed dial numbers entered by the system administrator and entered at the extension. Columns include: Type (extension speed dial or system speed dial), ID, Name, Number, and Note. See "Dialing Speed Dial Numbers" on page 25.

**MeetMe** — From the **MeetMe** tab, you can schedule and monitor phone meetings. See "MeetMe Conference" on page 33.

**Greeting** — From the **Greeting** tab, you can record and review greetings for each Activity state. See the following section.

## Changing Activity Status

You can specify your whereabouts, so that others are informed. Click the Down arrow on the **Activity** button and choose the appropriate category:

- **Available (System)** (the system greeting is used)
- **Available (Personal)** (your personal greeting is used)
- **Meeting**
- **Away**
- **Travel**
- **PTO** (personal time off)
- **Busy** (new in Release 9.0.1)

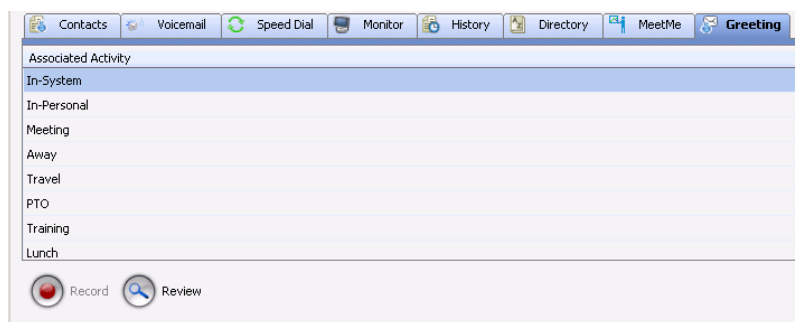
Your system administrator may have configured additional activities to select from.

The activity category you select appears beside the button. Keep your Activity status updated.

**Note:** If your account is UC-enabled, you will not see an Activity status in the Status Bar. Instead, you will see your Skype for Business Presence. Refer to “Using MaxCommunicator With Unified Communications” on page 55 for more details.

## Recording Activity Greetings

You can record a different greeting for each Activity status. To do so, click the **Greeting** tab, and select an Activity. Then click the **Record** button at the bottom of the tab to record a greeting. (Alternatively, you can right-click the activity, and select **Record**.) Use your phone or headset to record the greeting.



To hear the greeting played back, click the **Review** button. Change your greeting whenever you want to.

**Note:** If your account is UC-enabled you can assign different greetings for each Skype for Business Presence, instead of for each Activity.

## Turning Do Not Disturb On and Off

The **DND** button is a toggle that turns Do Not Disturb on and off. When Do Not Disturb is on, all incoming calls are forwarded according to your Enable Busy Call Handling settings.

**Note:** If the system administrator disabled the Do Not Disturb feature for your extension, the **DND** feature will not be available to you. If you select **DND**, an alert informs you that DND is not allowed.

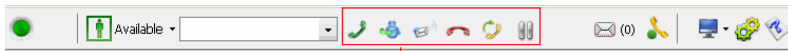
## Minimizing / Exiting MaxCommunicator

**Minimize** - To minimize MaxCommunicator, click the **Minimize** button in the top right corner of the screen. MaxCommunicator shrinks to an icon in the Windows task bar and the Windows system tray.

**Exit** - If you are shutting down Microsoft Windows, MaxCommunicator will close automatically. Otherwise, to close MaxCommunicator, right-click the icon in the Windows Task bar and choose **Close Window** or click the X in upper right corner of the MaxCommunicator window.

## Shrinking MaxCommunicator

To shrink MaxCommunicator to a strip at the top or bottom of your screen, click the **Arrange Window** button and select **Top** or **Bottom**. The strip displays the MaxCommunicator status bar, plus no more than six call control buttons and the dialer field:



Default call control buttons

To restore MaxCommunicator to full view, click the **Arrange Window** button and select **Normal**.

**Note:** The **Arrange Window** button does not work when you have the Skype for Business client docked (for UC-enabled users).

When MaxCommunicator is shrunk and you put a call on hold (by clicking on the **Hold** button), the number flashes. Clicking the number reconnects to the call.

**Note:** If a new call comes in while a call is on hold, MaxCommunicator changes to normal size automatically, allowing you access to both calls.

## Using the Windows Tray Phone Icon

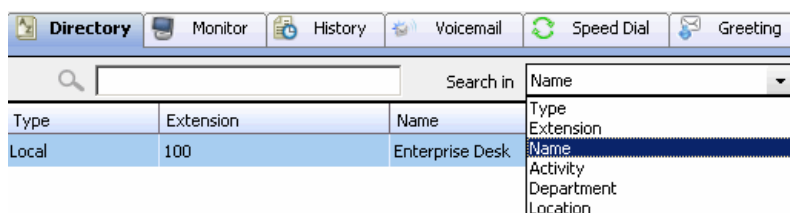
After you log in, the MaxCommunicator icon is displayed in the Windows tray, normally at the bottom right of your screen.

When you have new voice mail, the icon changes to show you have voice mail.

If MaxCommunicator is not on your Windows desktop, but either icon appears in the Windows tray, double-click it to open the MaxCommunicator main window.

## Searching in the Tabbed Windows

Searching is available in these tabs: Directory, History, Contacts, Voice Mail, and Speed Dial.



To search,

1. In the **Search in** field, select the column you want to search in.
2. Put your cursor in the field beside the magnifying glass, and type what you're looking for. The search begins as you type, and the list is narrowed to records that match what you're typing.
3. When you begin a new search, all the information that was 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.

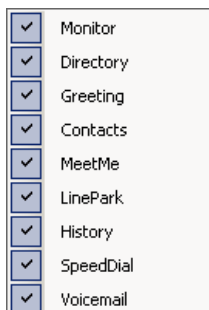
## Customizing the Display

You can customize the MaxCommunicator display to meet your needs in the following ways:

- **Resize MaxCommunicator** windows by using the standard Windows method: place the cursor at a window edge or corner, then drag the window to the size you want.

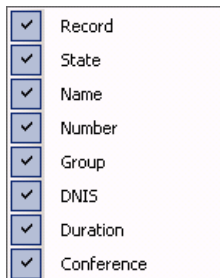


- **Specify the tabs** you want to see. To select the tabs you want to display, right-click on the area to the right of the tabs. A list of tabs appears:

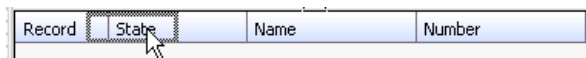


Check the tabs you want to display, and uncheck the tabs you don't want to display.

- **Specify the columns** you want to see by right-clicking a column heading and checking or unchecking columns in the pop-up list. Checked columns will be displayed.



- **Resize columns** by placing the cursor on a column divider in the header area until the cursor changes to a movable double bar (||). Then move the bar to resize the column.
- **Rearrange columns** by clicking and dragging a column name to the location you want.



Moving the Record column to the right

- **Sort columns** in ascending or descending order by clicking 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, MaxCommunicator keeps the sort order of the previously clicked column.

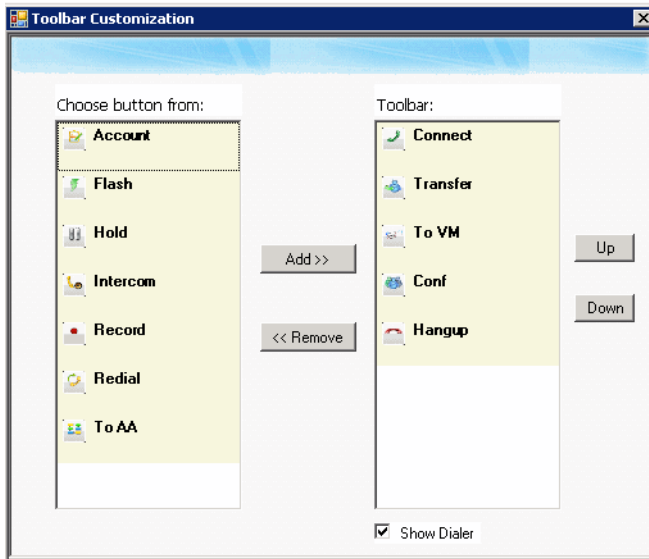


Ascending order



Descending order

- **Add, remove, and rearrange the toolbar buttons** in MaxCommunicator by right-clicking in the button area and choosing **Customize Toolbar Buttons**.

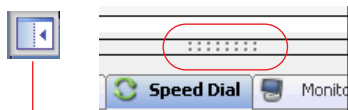


The buttons displayed in your MaxCommunicator are in the right-hand list. To remove a toolbar button, select it and click **Remove**. To add a toolbar button, select a button from the list on the left, and click **Add**. To rearrange buttons, select a button from the list on the right, and click the **Up** button or **Down** button, until the toolbar button is where you want it. When finished, click **OK**.

**Note:** When MaxCommunicator is shrunk to a strip at the top or bottom of your screen, six buttons are initially displayed by default in the shrunken toolbar: **Connect, Hold, Transfer, To VM, Hangup, Redial**. These are the only buttons available to a shrunken toolbar. You can remove any of them in the way just described and add them back again.

When MaxCommunicator is made normal size, the buttons you originally selected are again displayed in the toolbar. In other words, you configure the normal toolbar and the shrunken toolbar separately, and MaxCommunicator keeps your preferences for each.

- **Remove the dialer field** by right-clicking a toolbar button and choosing **Customize Toolbar Buttons**, as above. In the Toolbar Customization dialog box, clear the check box beside **Show Dialer**. To display the dialer again, check the **Show Dialer** check box.
- **Pop up MaxCommunicator** when you have incoming calls. Pop ups work when MaxCommunicator is minimized or is a strip at the top or bottom of the window but *not* when you have exited. See “Call Alert Options” on page 75.
- **Drag and dock the tabs** by dragging the dotted area above them to the right arrow, the left arrow or the bottom arrow. Once you start moving the group of tabs, the arrows appear. Move the cursor to an arrow, and the tabs will be docked at the side you selected.



Dragging and docking

When the docking arrows appear, they look like this

- **Drag and dock one tab** by dragging it by its tab until the cursor is on the arrow where you want the tab to dock.
- **Make a tab a separate window** independent of the MaxCommunicator main window by dragging it out by its tab, or by double-clicking the tab. 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 tabs area.



A tab is being dragged from an independent window back to the tabs group.

# Handling Calls

MaxCommunicator call handling-related functions include:

- Answering calls, see page 23
- Dialing out, see page 24
- Placing calls on hold, see page 26
- Using call waiting, see page 27
- Transferring calls, see page 27
- Conferencing, see page 30
- Recording Calls, see page 42
- Using account codes, see page 43
- Using voice mail, see page 44
- Monitoring other extensions, see page 48
- Viewing the history of calls, see page 49
- Using the Contacts tab, see page 50

**Note:** If your account is configured for Unified Communications (UC), then your window will look and behave a bit differently. See the chapter, “Using MaxCommunicator With Unified Communications” on page 55 for details.

## Answering Calls

To answer a call click the word *Ringing* in the call’s **State** cell. The state changes to *Connected*.

Record	State	Name	Number	Group
	Ringing	O	5102526353	

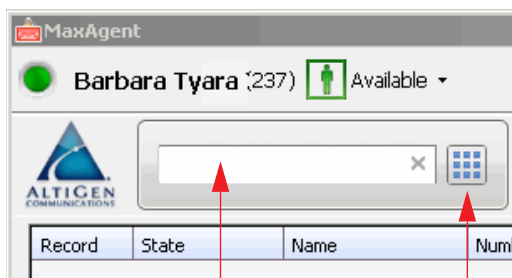
Record	State	Name	Number	Gr
	Connected	O	5102526353	

Or, click the **Connect** button in the toolbar.

## Dialing Out

To dial a number, click in the dialing field, enter a number or name, and then click the **Dial** button or press **Enter** on your computer keyboard.

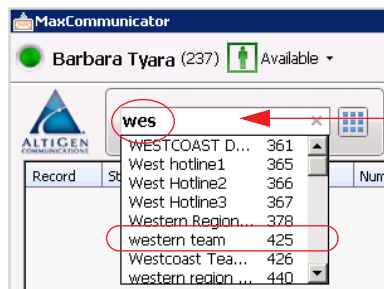
- **Enter a number** — You can enter a number in the dialing field by using the standard numeric keys or numeric keypad on your computer, or by using the dial pad in MaxCommunicator.
- **Enter a name** — For names recorded in the system, you can enter a name by using the keyboard on your computer to type the name. Then select the name from the drop-down list that opens. The number for that name appears in the dialing field. To close the drop-down list or clear the dialing field, click the "x" in the field.



You can start typing a name in the dialing field to open your company directory list. Then select a name

You can enter a number in the dialing field

You can click the Dial button to open the dial pad



Searching for "western team" by starting to type in the dialing field

The Call Information panel displays the state of the call:

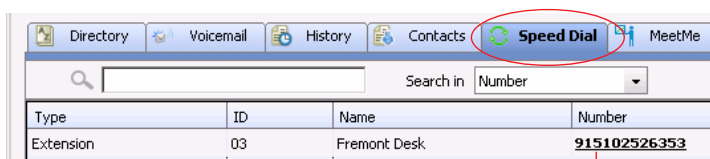
Record	State	Name	Number	Group
	Ringling	O	5102526353	

## Shortcut-Key Dialing

**Shortcut-key dialing** — If you configured your MaxCommunicator to let you use shortcut keys to dial a selected phone number in another program, for example, Excel or Internet Explorer, you can make a call by selecting the number and using those shortcut keys. To find out more about this option and how to configure it, see “Select-n-Dial” on page 64.

## Dialing Speed Dial Numbers

To dial speed dial numbers, click the **Speed Dial** tab:



Click the number to make the call

This tab lists speed dial numbers that you have configured at your extension (*extension* speed dial numbers), and it lists speed dial numbers, if any, that have been set up for your extension by the system administrator (*system* speed dial numbers). You can see in the **Type** column which numbers are extension speed dial numbers and which are system speed dial numbers.

To call a speed dial number, click the number in its **Number** column.

## Setting Up Extension Speed Dial Numbers

To set up an extension speed dial number:

1. Click the **Speed Dial** tab and double-click an empty Extension type row. The Extension Speed dialog box pops up.
2. Enter a name, number, and note if desired.  
When you add an outside number, all *relevant* prefix digits

such as trunk or route access number, the long distance prefix **1** and area codes must precede the phone number.

3. Click **OK**.

You can enter up to 20 speed dial numbers.

**Note:** Extension-type speed dial numbers are also set up by using the **#25** feature code on your phone set.

To edit a speed dial number in MaxCommunicator, double-click in its **Type**, **ID**, or **Name** columns. The Extension Speed dialog box pops up. Make your edits, and click **OK**. To delete the information, clear the fields and click **OK**. If you just want to edit a note, you can double-click in the **Note** field on the **Speed Dial** tab and edit the note right in the table.

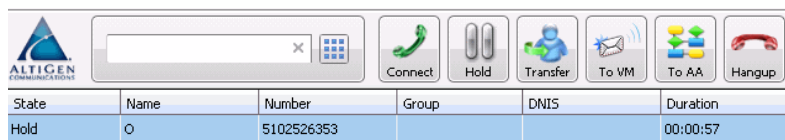
For system-type speed dial numbers, you can edit the note, but only the system administrator can edit the other fields.

## Redialing

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

## Placing Calls on Hold

During a phone call, either click the word *Connected* in the call's **State** cell or click the **Hold** button in the MaxCommunicator toolbar. The state of the call is changed from *connected* to a *hold* state and you will hear the dial tone.



The image shows a screenshot of the MaxCommunicator interface. At the top is a toolbar with icons for Connect, Hold, Transfer, To VM, To AA, and Hangup. Below the toolbar is a table with columns: State, Name, Number, Group, DNIS, and Duration. The first row shows a call in 'Hold' state with Name 'O' and Number '5102526353'.

State	Name	Number	Group	DNIS	Duration
Hold	O	5102526353			00:00:57

Click **Hold** in the call's State cell to release the hold and reconnect the call.

**Note:** When a call is put on hold automatically by the system (to queue), the system will ring you after two minutes if the call is still on hold.



## Using Call Waiting

During a call, you may receive another incoming call. To answer the call, click ringing in the new call's State cell. The call to which you were connected goes to the hold state.

Record	State	Name	Number
	Connected	O	5102526353
	Ringing	SANTA CRUZ CA	8318188219

Click Ringing to answer second call

Record	State	Name	Number
	Hold	O	5102526353
	<u>Connected</u>	SANTA CRUZ CA	8318188219

The first call goes to Hold state

When you are ready to reconnect to the call on hold, click **Hold** in the State cell of the call. The call goes to the connected state.

## Transferring Calls

**Note:** Agents using Polycom VVX model phones, refer to the MAXCS Polycom user guides for instructions on additional ways that you can transfer calls. The user guides for the various Polycom models can be found on Altigen's web site, at: <https://www.altigen.com/support/>.

MaxCommunicator allows for both supervised transfer (in which you confirm the transfer with the target) and blind transfer.

You may transfer calls in the following ways:

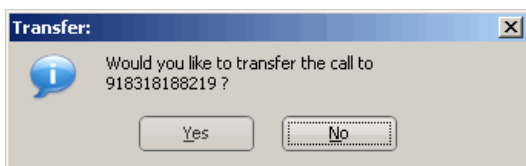
**Dragging** — Drag and drop the call (either while it's ringing or connected) onto the target number on the Directory, Speed Dial, Contacts, or Monitor tabs.

**Dialing** — While connected to a call, in the dialing field enter the target number you want to transfer to, then click the **Transfer** button.

**Clicking** — If the target number is on the Directory, Speed Dial, Contacts, or Monitor tab, click it. Then click **Transfer**.

You're asked to confirm the transfer.

You can click **Yes** before the party answers to do a blind transfer, or you can wait for the person to answer and then confirm or cancel the transfer.

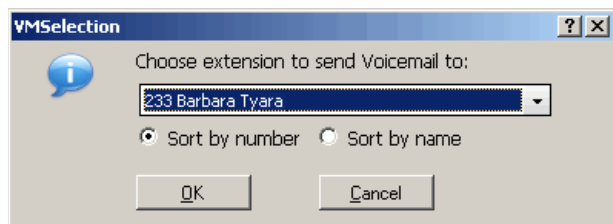


At any time before or after the person you're transferring to answers the phone, you can cancel the transfer by clicking the **No** button or by closing the dialog box.

If the transfer is canceled, MaxCommunicator reconnects the call to your extension. The call is also reconnected if the third party doesn't answer.

## Transferring to Voice Mail

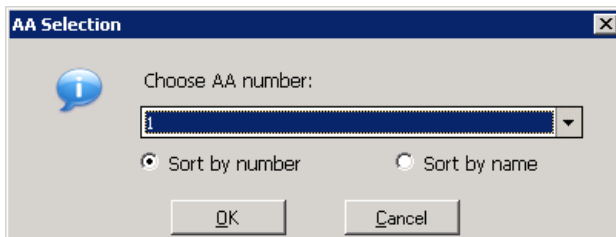
While connected to a call, click the **To Voicemail** button in the toolbar. In the box that pops up, choose the extension you want to send the call to, then click **OK**. (You can sort extensions by number or by name.)



**Note:** You can also forward a call to voice mail without answering it by clicking the **To Voicemail** button while the call is ringing.

## Transferring to Auto Attendant

To transfer a call to an auto attendant, while connected to the call click the **To AA** button. The AA Selection box pops up. Use the drop-down list to select an auto attendant to transfer to. (You can sort the list by number or by name.)



**Note:** You can forward a call to an auto attendant without answering it by clicking the **To AA** button while the call is ringing.

## Transferring Calls Over Tie-Trunks

Some organizations need to transfer calls to other extensions over Tie-Trunk. IPTalk in MaxAgent has been enhanced to make it easier to transfer calls over Tie-Trunks.

NEW

1. Right-click a call entry and choose **Transfer over Tie-Trunk** from the menu.
2. In the pop-up, enter the target extension number and click **Transfer**.

Depending upon where you are transferring the call, the following will happen:

**If the target is a physical extension** — You will hear the call ring.

- If the target party answers, the trunk call will be held while you speak with that person. When you hang up, the held call will be connected to the target party.
- If the target party does not answer and your call is directed to the target party's voicemail mailbox, you will hear a prompt. You have two options:
  - To send the call to the target party's voicemail, hang up.
  - To reconnect to the caller, press the Flash and Star buttons.

**If the target is an APC extension** — MaxAgent hangs up your call automatically and connects the trunk call to the target APC extension.

**If the target is a workgroup number** — You will hear the call ring.

- If a workgroup member answers, the trunk call will be held while you speak with that person. When you hang up, the held call will be connected to the workgroup member.
- If the workgroup is sending the call to voicemail or placing the call in the call queue, you have two options:
  - To complete the transfer, hang up.
  - To reconnect to the caller, press the Flash and Star buttons.

**If the target extension does not exist** — You will hear a prompt, "The extension you are calling is invalid; press the Flash and the Star button to reconnect to the calling party."

**If the target extension is a virtual extension that is forwarded to IVR or voicemail** — You will hear a prompt, "The extension you are calling is not available at the moment." You have two options:

- To complete the transfer, hang up.
- To reconnect to the caller, press the Flash and Star buttons.

## Forwarding Calls Using Do Not Disturb

If allowed, click the **DND** button to forward all incoming calls according to your "Enable Busy Call Handling" settings. See "Busy Call Handling and No Answer Handling" on page 68.

## Making Conference Calls

**Note:** Agents using Polycom VVX model phones, refer to the MAXCS Polycom user guides for instructions on additional ways that you can work with conference calls. The user guides for the various Polycom models can be found on Altigen's MAXCS web site, at: <https://www.altigen.com/support/>.

There are two types of conference calls in MaxCommunicator:

- **Station conferencing.** In this type of conferencing, when you're on a call, you can dial a third party and then conference that party in to the call. Any internal user is able to add parties to this type of conference call.

- **MeetMe conference.** If your company has this feature available, you can schedule a meeting to take place at a specified time in the future and invite people to the meeting. Invited people call the MeetMe conference extension number to join the meeting at the designated meeting time. (See “MeetMe Conference” on page 33.)

## Station Conferencing

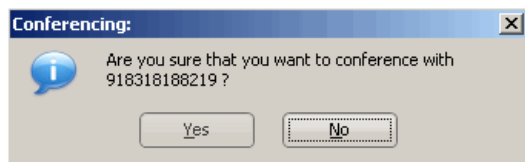
Using this method, you may conference up to six calls.

**Note:** In order to conference *incoming* calls, **Single Call Waiting**, **Multiple Call Waiting** or **Live Call Handling** must be checked in the MaxCommunicator Configuration window, **Extension > Call Handling** screen.

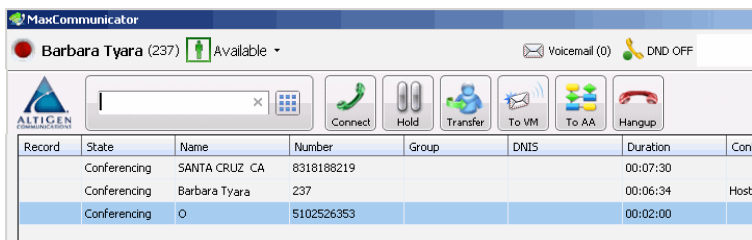
You may conference calls in the following ways:

- **Dragging** — While connected to one party, drag a Hold call to the Connected call, or drag a number from the Directory, Speed Dial, Contacts, or Monitor tabs to the *Connected* call. Repeat to add more callers. Each call in the conference displays *Conferencing* state.
- **Dialing** — While connected to one party, in the dialing field enter the extension or phone number you want to conference with, then click the **Conference** button.

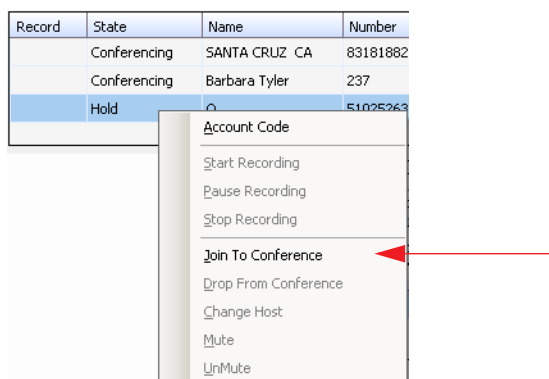
While MaxCommunicator dials the new number, the other party or parties go into *Hold Pending* state, and you see a confirmation dialog box.



After the dialed party answers, click **Yes** in the dialog box. If the dialed party does not answer, click the **No** button.



- **Selecting from Menu** — When a call is on hold, you can add it to the conference by right-clicking the call and selecting **Join to Conference**:



## Canceling Conference Calls

You can cancel the conference using any of the following methods:

- Click the **No** button in the confirmation dialog box.
- Close the conference confirmation dialog box.
- Click the **FLASH** button.
- Right-click the appropriate call and select **Drop From Conference**.

Normally, after canceling you will be reconnected automatically to the initial call. If you are not automatically reconnected and want to reconnect to the first call, click the call's *Hold Pending* state cell.

**Note:** The conference host is the user who initiates the conference call, and only the conference host can drop a call from conference. If the conference host hangs up, no one else in the conference call can drop a call from the conference.

## When Conference Participants Are Reduced to Two

The station conference bridge is released when the number of conference participants is reduced to two. The displayed state changes from "Conference" to "Connected" in MaxCommunicator. The call can then be transferred, parked, or tagged with an account code, and another party with privilege can monitor, barge in, listen to, or coach the call.

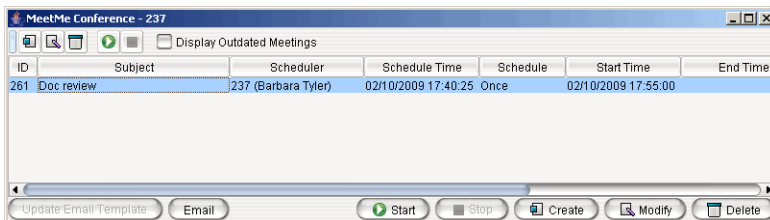
**Note:** With Polycom phones, if the conference initiator hangs up and there are only two parties left on the conference call, then the call reverts to a direct call.

However, if the conference initiator is one of the two remaining callers, the call will remain a conference call. In this scenario, neither party can transfer the call to another party. If the conference initiator wants to transfer the call, the initiator must conference in the other party and then drop off.

## MeetMe Conference

If your company has this feature available, you can schedule a phone meeting to take place at a specified time in the future and invite people to the meeting. Invited people call the MeetMe conference extension number to join the meeting at the designated meeting time.

To schedule a phone meeting, click the Schedule Meeting button. The MeetMe Conference window opens:



Using this window, you can:

- Create a one-time or recurring meeting and set its parameters
- Open Microsoft Outlook to send an e-mail invitation to participate in the meeting
- Start and stop a meeting
- Modify or delete a meeting
- See meeting ID, subject, scheduler, time, frequency, start time, end time, the last time the meeting started, its status, and the resource being used.
- Display or hide outdated meetings
- Modify column display

## Working in the MeetMe Conference Window

- Click a button to perform a function (for example, create a meeting). The buttons at the bottom of the window are labeled with their function; the buttons at the top of the window perform the same functions. In addition, at the top of the window, you can choose to display outdated meetings by checking the **Display Outdated Meetings** check box. Deselect the check box to hide outdated meetings.
- Select an existing meeting to perform a function on it (for example, to start or stop the meeting). You can select one meeting at a time.
- Functions can also be performed on an existing meeting by right-clicking the meeting and selecting from the context menu.
- Click a column heading to sort by that column. An arrow is displayed that indicates the sort order, ascending or descending. Click again to reverse the sort order.



- Use the scroll bar at the bottom of the window to display additional columns, if necessary.
- Change column size by clicking and dragging a column border.



- Change column order in the current window by dragging a column heading to where you want it.
- You can open more than one MeetMe Conference window and work with different meetings and displays in each one. Modifications you make to the *display* in a MeetMe Conference window are not retained after you close the window.
- You can double-click a meeting to open the Modify Meeting dialog box.

## Using the Calendar Button

The Create Meeting and Modify Meeting dialog boxes use Calendar buttons for date selection. To select a date, click the **Calendar** button. When the calendar is open, use the Up/Down arrows to select the year, *or* you can type in a year and then press **Enter**.

Click the **Calendar** button again to close the calendar.

## Creating a Meeting

To create a meeting, click one of the **Create** buttons. The Create Meeting dialog box opens.

**Create Meeting**

ID:

Scheduler:  Schedule Time:

Subject:

Reserve Seats:  Host:

Frequency:

Duration:

☒ Now

☐ On Date: Date:  Start:

**Security**

☐ Require Conference Passcode

Passcode:

**Options**

☐ Announce Participant Name

The options in the middle panel change, depending on the frequency you select

The following parameters apply to all meetings:

Parameter	Description
ID	The conference ID is created by the system.
Scheduler	The name of the person scheduling the meeting.
Schedule Time	The time the Create Meeting dialog box was opened to create this meeting.
Subject	Identifies the subject or type of meeting. What you enter here should be easily identifiable in the meeting list.

Parameter	Description
Reserved Seats	Use the Up/Down arrows or type in a number, up to 30, to indicate the number of expected participants. If your company's phone system allows it, you can invite up to 120 participants. If the conference has more than 30 members, by default all the members are muted. The conference host can un-mute up to 30 members concurrently.
Host	Select the extension number of the host of this meeting. The host can start and stop the meeting and can mute and drop meeting members.
Frequency	Select the frequency of this meeting from the drop-down list. A "weekly" or "monthly" meeting can actually be specified as every 2nd week/month or every 3rd week/month, and so on.
Middle panel: Options in the middle panel vary according to the frequency of the meeting. See the sections below this table.	
Require Conference Passcode	If you check this, no one can participate who does not enter the conference passcode that you supply.
Passcode	If you are requiring a passcode, enter it here.
Announce Participant Name	If you want participant names announced when they enter the meeting, check this check box.

Fill in the fields of the Create Meeting dialog box, and click **OK**. See the following sections for directions on filling in the fields in the middle panel of this dialog box.

**Note:** If other scheduled meetings have already reserved resources for the time period, and sufficient resources are not available for the meeting you are attempting to schedule, a message pops up telling you that there is a resource conflict.

## One Time Only Meeting

If you select **One Time Only** from the **Frequency** drop-down list, these are your options in the middle panel:

Duration: 30 minutes

☒ Now

☐ On Date: Date: 02/10/2009 Start: 03:05 PM

1. Specify the duration of the meeting, using the Up/Down arrows.
2. If the meeting is to begin as soon as it is scheduled, select **Now**.
3. If the meeting is to begin at another time, select **On Date**, and enter a date and start time. To select a date, click the **Calendar** button. To select a start time, click the Down arrow and use the slide bar.

## Weekly Meeting

If you select **Weekly** from the **Frequency** drop-down list, these are your options in the middle panel:

Frequency: Weekly

Duration: 30 minutes Start: 08:00 AM

Every 1 week(s), on

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday  
☐ Thursday ☐ Friday ☐ Saturday

Range of Recurrence

Begin: 02/10/2009

☒ End after 1 occurrence(s)  
☐ End by 02/10/2009

1. In the **Duration** field, specify the duration of the meeting, using the Up/Down arrows.
2. In the **Start** field, specify the start of the meeting by clicking the Down arrow and using the slide bar.
3. In the **Every** field, specify how often this meeting is to occur: every week, every other week, every three weeks, and so on.
4. Check the day of the week on which this meeting will occur.
5. In the Range of Recurrence panel, use the **Calendar** button to select a date for the first meeting.
6. Select **End after x occurrences** and choose the number of times the meeting is to occur *or* select **End by** and click the **Calendar** button to specify a date at which the meetings will cease.

## Monthly Meeting

If you select **Monthly** from the **Frequency** drop-down list, these are your options in the middle panel:

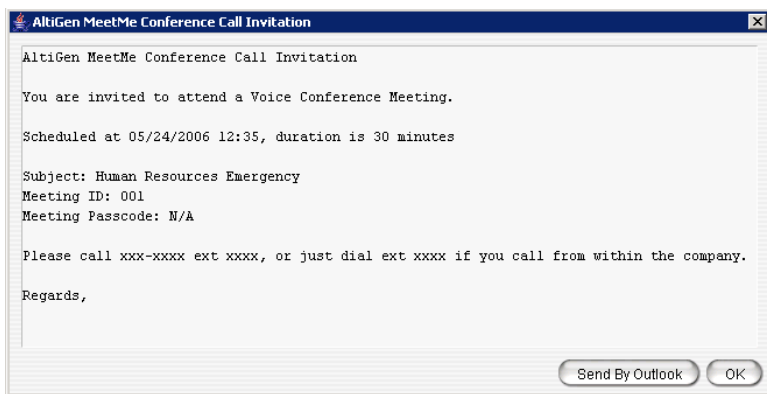
The screenshot shows a software interface for setting meeting recurrence. At the top, a 'Frequency' dropdown menu is set to 'Monthly'. Below this, the 'Every' field is set to '1' with a unit of 'month(es)'. The 'Duration' field is set to '30 minutes'. The 'Start' field is set to '08:00 AM'. There are two radio buttons: 'On Date' (selected) and 'Hold during weekend' (unchecked). The 'On Date' section has a 'First' dropdown and a 'Monday' dropdown. Below these is a 'Range of Recurrence' section with a 'Begin' date of '02/10/2009' and a calendar icon. It also has two radio buttons: 'End after' (selected) and 'End by' (unchecked). The 'End after' section has a '1' dropdown and a unit of 'occurrence(s)'. The 'End by' section has a date field with '02/10/2009' and a calendar icon.

1. In the **Every** field, specify how often this meeting is to occur: every month, every other month, every three months, and so on.
2. In the **Duration** field, specify the duration of the meeting, using the Up/Down arrows.
3. In the **Start** field, specify the start of the meeting by clicking the Down arrow and using the slide bar.

4. Select either **On Date** to specify a day of the month by *number* (for example, the 10th day of the month) or select **On** to specify a day of the month by *name* (for example, the first Monday of the month).
5. If you use **On Date**, the specified date (for example, the 10th day of the month) may sometimes fall on a weekend day. Check the box **Hold during weekend**, if the meeting will be held even on a weekend day.
6. In the Range of Recurrence panel, use the **Calendar** button to select a date for the first meeting.
7. Select **End after x occurrences** and choose the number of times the meeting is to occur *or* select **End by** and click the **Calendar** button to specify a date by which the meetings will cease.

## E-mailing a Meeting Invitation

In the MeetMe Conference window, click the **Email** button to see an automatically generated meeting invitation. It will look something like this:



In the Invitation window, you can then click the **Send By Outlook** button to open Microsoft Outlook. The meeting invitation is pasted into a new message in Outlook, and the Outlook **Subject** field is filled in with "Conference Call Invitation". Choose the people to whom you want to send the invitation, make any edits you may want to make, and click **Send**.

## Starting and Stopping a Meeting

The meeting host and the MaxAdministrator ("Admin") can start and stop a meeting.

To start a meeting if you are the host, select the meeting in the MeetMe Conference window and choose **Start**. Once the meeting is "started," the host can log into it (see "Joining a MeetMe Conference" on page 42).

To stop a meeting before its scheduled duration is over, select the meeting and choose **Stop**. Manually stopping a meeting frees up resources. Otherwise, the resources will not be freed until the scheduled meeting duration is over.

## What the MeetMe Conference Host Can Do

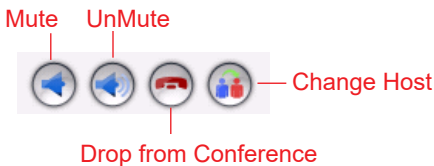
If you are the host of a MeetMe conference, in addition to starting and stopping a meeting, you can:

- Mute/unmute other participants

**Note:** If the conference has more than 30 members, by default all the members are muted. The conference host can un-mute up to 30 members concurrently.

- Drop participants from the conference
- Make someone else the host

To do any of these, either right-click the person's name in the MeetMe window and choose a command from the context menu, or use the buttons at the bottom of the MeetMe tab:



**Note:** Changing the host does not affect the Mute setting for the original host or the new host. If the new host was muted before the transfer of hosting duties, that host will have to **UnMute** himself in order to be heard. Similarly, the original host will still be unmuted if he was unmuted before transferring hosting duties.

## Continuing a Meeting Beyond Its Duration Time

When the scheduled meeting time is up, the meeting may continue if no other scheduled meeting needs the resources. If another meeting is scheduled and the resources are needed for that meeting, the current meeting is terminated.

## Joining a MeetMe Conference

Users calling from an extension can join a meeting by dialing the MeetMe Conference extension number. Users calling through a trunk must first dial the company number, then the MeetMe extension number.

Users are prompted to dial the meeting ID number. If the meeting has not yet been started, the user hears an appropriate message and can try again later.

If a passcode is required, the user is prompted to enter the passcode.

## Recording Calls

The voice recording feature in MaxCommunicator allows a user to record conversations. Recorded conversations can then be played back through voice mail or accessed at a centralized location.

**Note:** Your organization must have a recording seat license for each extension that will be recording.

**Note:** The voice recording feature is only available to Triton Analog extensions and IP extensions.

**Warning!** Listening in to or recording a conversation without the consent of one or both parties may be a violation of local, state and federal privacy laws. It is the responsibility of the users of this feature to assure they are in compliance with all applicable laws.

## Recording on Demand

When the system administrator has set your extension to record on demand (to a central location or to your voice mail), you can use MaxCommunicator to initiate the recording.



**To record a call** — While connected to a call, click the **Record** button, 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 has set the **Insert Recording Tone** option for your extension, both parties will hear a tone when the recording begins and every 15 seconds thereafter.

**To pause recording** — Right-click the call and select **Pause Recording**.

**To end recording** — Right-click the call and select **Stop Recording**.

**To listen to the recording** — If the system is set to save the recording as your voice mail, you can hear the recording through the Altigen Voice Mail System. If the recording is being saved to a centralized location, contact the system administrator for the location.

**Note:** Do not enter an account code while recording, because doing so will disconnect the call.

## Using Account Codes

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

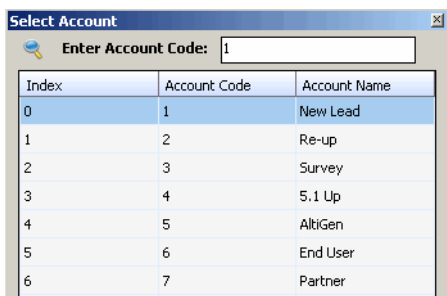
**Required account codes** — If your extension has been configured to require account codes for all outbound calls, the Account Code dialog box pops up prompting you to enter an account code for each outbound call. The dialog box may or may not contain a list of account codes, depending on how the administrator has configured your extension. After entering the code, click **OK**.

If your extension configuration allows you to override the account code requirement, you can either enter an account code in the field at the bottom of the dialog box or enter **#** to bypass the account code altogether.

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

To associate a call in progress with an account code,

1. Click the **Account** button.



The 'Select Account' dialog box features a search field labeled 'Enter Account Code:' with the value '1'. Below it is a table with three columns: Index, Account Code, and Account Name.

Index	Account Code	Account Name
0	1	New Lead
1	2	Re-up
2	3	Survey
3	4	5.1 Up
4	5	Altigen
5	6	End User
6	7	Partner

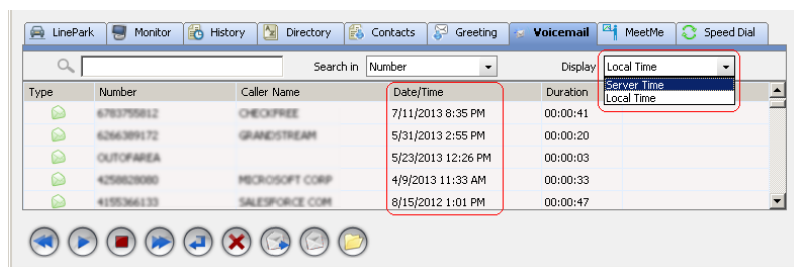
2. In the dialog box, select an account code if a list is displayed, and click **OK**. If a list is not displayed, enter an account code in the **Enter Account Code** field and click **OK**.

**Note:** Do not enter an account code while recording; doing so will disconnect the call.

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

## Using Voice Mail

Click the **Voicemail** tab in the main window to see a list of your voice mail messages.



The screenshot shows the 'Voicemail' tab selected in the main window. It displays a list of voicemail messages with columns for Type, Number, Caller Name, Date/Time, Duration, and Display. A dropdown menu is open for the 'Display' column, showing options for 'Local Time', 'Server Time', and 'Local Time'.

Type	Number	Caller Name	Date/Time	Duration	Display
	6783755612	CHECKFREE	7/11/2013 8:35 PM	00:00:41	
	6264389172	GRANDSTREAM	5/31/2013 2:55 PM	00:00:20	
	OUTOFAREA		5/23/2013 12:26 PM	00:00:03	
	4258628080	MICROSOFT CORP	4/9/2013 11:33 AM	00:00:33	
	4195366133	SALESFORCE.COM	8/15/2012 1:01 PM	00:00:47	

Choose **Display** to indicate whether to show the time of the voicemail messages as the local time or the server time (this is offered only if the server is in a different time zone).

- New voice mail messages are indicated by a white, closed envelope and bold type.

- Heard voice mail 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 MaxCommunicator icon in the Windows tray and in the MaxCommunicator title bar becomes a red envelope, and the **Voicemail** indicator in the status bar bears a red circle.
- If the message is saved, the envelope looks like this:



- A paperclip symbol on the envelope indicates an attachment, which is a voice mail message forwarded from another extension.

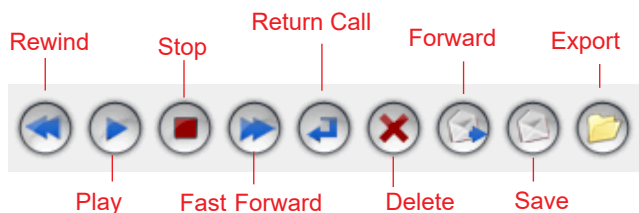
## Dealing with Voice Mail

Select the message and use the voice mail command buttons at the bottom of the **Voicemail** tab, as shown in the figure below. You can also access these commands by right-clicking a voice mail and selecting a command from the context menu.

Listening options are configurable, as described in “General Information” on page 64. You can listen using the sound card on your PC or your phone. If you’re not using IPTalk, you can play voice mail to a sound card while your phone is in the connect state. (You cannot do this if you’re using IPTalk.)

When you listen to a new message, the envelope icon changes from closed to open, indicating that the message has been heard, and the type font changes from bold to regular. Also, when you play a voicemail, MaxCommunicator shows *Play VM* in the Call Control panel, and shows the play duration . (The duration does not reflect fast forwarding or fast rewinding.)

Use the voice mail command buttons to perform the following functions:



If you click another message in the list, the current message stops playing.

## Save on a Remote Server or Export Locally

You can save a message as a .wav file that you can play back later. To do so, select the message and click either the **Save** button or the **Export** button (or right-click the message and choose **Save** or **Export**).

- **Save** saves the message automatically on a remote server in a location designated by the system administrator. No file saving dialog box opens.
- **Export** opens a file saving dialog box that lets you name the .wav file and choose a directory in which to store it. You can then play the .wav file on a media player.

## Deleting Messages

To delete a selected message, click the **Delete** button, or right-click a message and select **Delete** from the context menu.

## Returning a Call

To return the call, select the voice mail and click the **Return** button or click the number in the **Number** field.

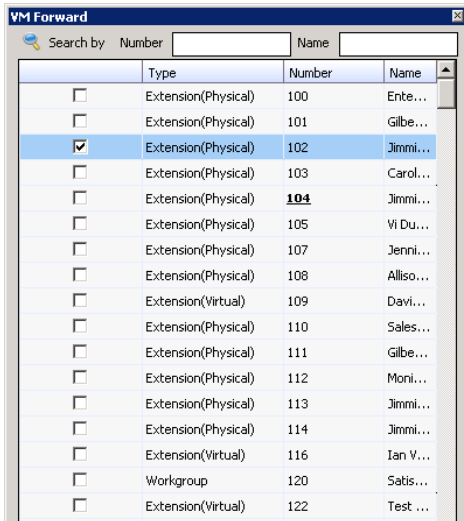
## Attaching a Note

To add a note to accompany a voice mail, double-click in the **Note** field and type your note. Or right-click a voice mail entry and choose **Note** from the pop-up menu. Type your note and click **OK**.

## Forwarding Voice Mail

To forward a voice mail to an extension or a VM group,

1. Select the voice mail and click the **Forward** button.



2. Check the check box next to the extension to which you want to forward the message.

If you need to search for a person by extension or name, type the first letters of the number/name into the **Search by Number** or **Name** box. The matching extension or name displays in the list as you type.

### Notes:

- Click on the column headings to sort the data.
  - If the extension name is configured for an extension, it is used to match the search string. If the extension name is not configured, then the extension number is used to match the search string for this extension.
3. Click **OK** to complete the forwarding.

## Monitoring the Activity of Other Extensions

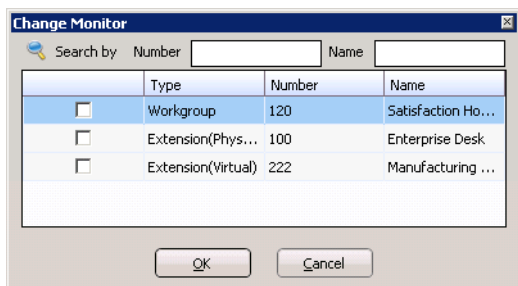
If your system administrator has configured your extension for monitoring specific other extensions, you can monitor the activity on those other extensions or view call history.

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

## Choosing Extensions to Monitor

To choose extensions to monitor:

1. Click the **Monitor** tab, and click **Select Extensions** at the bottom of the page.



2. Select the check boxes next to the extensions you want to monitor, and click **OK**. If the list is long and you want to search, type a number or name in the appropriate search box.

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

**Note:** In order to see activity for remote extensions on the Directory tab, you must add those remote extensions to your Monitor list by following the steps described above.

## Reading the Monitor List

The monitor window includes these fields: State, Extension, Name, Activity/Presence, DND/FWD, Caller Name, Number, Department, Location, DNIS, and Duration.

**Note:** If you do not see an extension's **Caller Name** and **Number** details, your administrator may have blocked those fields from your view.

The state can be one of the following:

- **Idle** — the extension is not in use
- **Connected** — the extension is in use
- **Ringing** — the phone on the extension is ringing; you can click the **State** field to pick up the call at your own extension
- **Conferencing** — the extension is on a conference call
- **Voice mail** — the extension is in voice mail
- **Auto Attendant** — the extension is connected to an auto attendant
- **Holding** — the extension is on hold
- **Hold Pending** — the extension is on hold, and an action is pending

## Calling or Picking Up Calls

If a monitored extension is *Idle* (green dot) you can click its **Extension** field to ring the extension.

If a monitored extension is *Ringing* (red dot), you can click its **State** field to pick up the call.

## Viewing the Call History

Click the **History** tab to view data about handled calls.

Directory	Voice mail	History	Contacts	Speed Dial	MeetMe	
Search in		Name				
Direction	Number	Name	Date/Time	Dural		
>	8318188219	SANTA CRUZ CA	7/3/2008 6:41 PM	00:00		
<	18318188219		7/3/2008 6:39 PM	00:01		
<	18318188219		7/3/2008 6:37 PM	00:01		
>	8318188219	SANTA CRUZ CA	7/3/2008 6:33 PM	00:00		
>	237	Barbara Tyler	7/3/2008 6:38 PM	00:00		
<	18313354605		7/3/2008 6:36 PM	00:00		
>	10 10 0 110-765	Scott IP7	7/3/2008 5:02 PM	00:00		

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

The **History** tab displays the following fields:

- **Direction** — indicates if the call is incoming or outgoing, or was a missed call. *Left-pointing green arrow* indicates outgoing call; *right-pointing red arrow* indicates incoming call. Right-pointing arrow with exclamation point indicates a missed call.
- **Number** — the extension or phone number on the other end of the call. Click a number in the **Number** column to dial that number.
- **Name** — Caller ID information, if available.
- **Date/Time** — the date and time of the call.

When you sort on Date/Time, the calls are sorted by last disconnected and not in the order the call was received. It is therefore possible to have a record with an earlier timestamp followed by a record with a later timestamp.

Also, the timestamp for call data is based on the client system, while the timestamp for voice mail messages is from MAX Communication Server. Thus, the times displayed here may not match those in the voice mail view in the main window.











- **Duration** — the duration of the call.
- **DNIS** — DNIS digits collected, if available
- **Group** — Group number or name
- **Note** — a note attached to the call. To enter a note, double-click the **Note** field and type your note.
- **TRUSTID** — If your organization has deployed the TRUSTID feature, you may see TRUSTID information for appropriate calls.

Use the **Delete** button to delete selected calls in the history list. Use the **Delete All** button to delete the entire call history list. MaxCommunicator will ask you to confirm the deletion.

## Using the Contacts Tab

To populate the **Contacts** tab with the contacts listed in your Outlook, Outlook or Express application, see “CRM Integration” on page 77.



		<b>Contacts</b>				
Search in <input type="text" value="Name"/>						
Company	Business	Mobile Phone	Email Address	IM Address	OCS Presence	
	(510) 252-9712		yaoj@altigen.com	yaoj@altigen.com	 Available	
			/O=Altigen/OU=Fre...	travis.burris@altigen.com	 Offline	
	x303	913-484-4711	/O=Altigen/OU=Fre...	tracy.acree@altigen.com	 Away	
			/O=Altigen/OU=Fre...	Todd.Candela@altigen....	 Available	
Altigen			/o=Altigen/ou=Frem...	shirley@altigen.com(Av...	Offline	

**E-mail a contact** — Click a contact's e-mail address to open Outlook, where you can send an e-mail to the contact.

## MaxCommunicator with Polycom Phones

The MAXCS clients have improved integration with Polycom phones; you can perform many actions via your Polycom phone or via MaxCommunicator (or another client). For example, you can do the following:

- Use additional methods to transfer calls
- Use additional methods to join conference calls and to initiate ad-hoc conference calls
- Configure various Polycom auto-answer options

Some of these extra features require a *Polycom Advanced Features* license; some features are available only on certain models of Polycom phones.

Refer to the MAXCS Polycom user guides for instructions on how to configure Polycom features. These guides can be found at <https://www.altigen.com/support/>.

## Supervised Transfers with Polycom Phones

You can perform a supervised transfer without using your Polycom phone.

To use this technique, the setting **Use Polycom Phone to Make or Answer Calls** must be enabled.

1. Put the call on hold by clicking the **Hold** button in MaxCommunicator.
2. Make a new call by either typing the number in the dialing field in MaxCommunicator or by clicking on another extension in MaxCommunicator.
3. When you are ready to transfer the call, make sure the original call is selected in your call window and then click the **Transfer** button in MaxCommunicator.

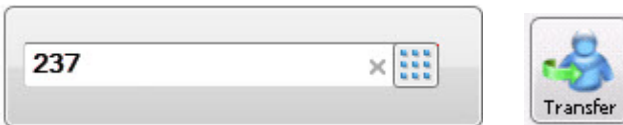


## Blind Transfers with Polycom Phones

You can perform blind transfers in MaxCommunicator without using your Polycom phone.

To use this technique, the setting **Use Polycom Phone to Make or Answer Calls** must be enabled.

1. While on the call, enter the extension or number into the dialing field of MaxCommunicator.
2. Click the **Transfer** button. Note that you **do not** want to put the call on hold first.



Another method is to take your active call and drag it (with your mouse) to the target extension in the *Directory* tab. Do **not** put the call on hold first.

## Starting Conference Calls with Polycom Phones

You can start conference calls in MaxCommunicator without using your Polycom phone.

To use this technique, the setting **Use Polycom Phone to Make or Answer Calls** must be enabled.

1. Establish the first call.
2. Place this first call on hold by clicking the **Hold** button in MaxCommunicator.
3. Establish the second (or next) call.
4. Once the second call is connected, click the **Conference** button. (An alternative method is to drag and drop the held call onto the second call in the active call window.)



5. To add a more calls to the conference (up to 8), repeat steps 2-4; click **Hold**, make the next call, and click **Conference**.

You can remove any member from the conference by right clicking that member and clicking **Remove from conference**.



# Using MaxCommunicator With Unified Communications

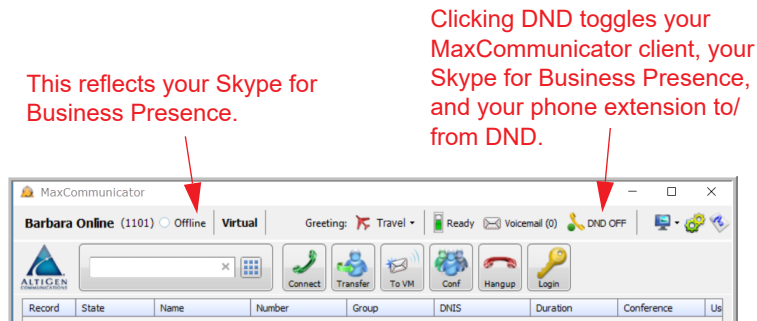
MAXCS now provides presence and activity synchronization between a MAXCS extension and Altigen-hosted Unified Communications (UC) Skype for Business clients.

You will be able to synchronize MaxCommunicator with Skype for Business if your administrator has enabled UC for your extension.















## The Main Window

If your account has been configured for UC, your window will look lightly different than the window of a non-UC agent.

For example, instead of showing your activity, your Status Bar will show your Skype for Business *Presence*.



In addition, the Activity column on the Directory tab will now display each agent's Skype for Business Presence (if those agents are configured for UC). For agents who are not UC-enabled, you will see their Activity.

Extension	Activity	Department
209	 Available	
210	 Off Work	Tech Support
213	 Online	
214	 Available	
215	 Available	Tech Support
217	 In a MaxCS Call	
218	 Available	
219	 Available	
220	 Available	Tech Support
221	 Available	
225	 Available	
226	 Available	
228	 UC Offline	
231	 Online	

## About Presence

Presence is pushed from Skype for Business to MaxCommunicator. This means that you cannot manually change your Presence in MaxCommunicator.

## Phone Status Will Update Presence

Many MAXCS activities on your phone extension will automatically reset your Presence.

- When you accept a MAXCS call on your extension, your Presence will automatically change to “In a MaxCS Call”
- When your extension becomes idle again, your Presence will automatically change to “Available” (unless you had manually set your Presence before or during the call)
- When you join a MAXCS conference call on your extension, your Presence will automatically change to “MaxCS Conference”

In some cases, if you have manually set your Presence, Skype will not override that setting.

## Skype for Business Activities Will Update Presence

Some Skype for Business client activities will reset your Presence automatically.

- **Conference** — You are in a Skype for Business conference call
- **In a Call** — You are in a Skype for Business call

In some cases, if you have manually set your Presence, Skype will not override that setting.

## Other Events May Update Presence

Other events may automatically update your Presence:

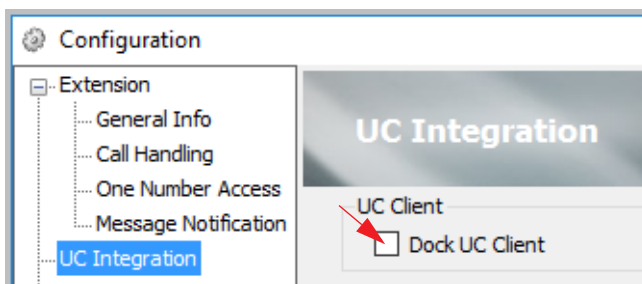
- Skype for Business may set your Presence to “Meeting” based upon meeting appointments in your Outlook calendar
- Skype for Business may set your Presence to “Out of the Office” if you have an Outlook appointment that you designated as Out of the Office
- Skype for Business may set your Presence to “Presenting” if you have shared your desktop
- Clicking DND on your phone, in your MaxCommunicator window, or in your Skype for Business client will set **all three of these** to Do Not Disturb.

## Docking the Skype for Business Client

Your Skype for Business client can dock with MaxCommunicator. MaxCommunicator will be on the left; the Skype for Business client beside it, on the right. When you open MaxCommunicator, the Skype for Business client will automatically open as well.

To configure whether to dock the Skype for Business client,

1. Click the **Configuration** button in the upper right corner of the MaxCommunicator main window.
2. Select **UC Integration**.
3. Either select or clear the **Dock UC Client** option.



After changing this option, you must restart MaxCommunicator so that the change will take effect.

While the Skype for Business client is docked, if you close MaxCommunicator, then the Skype for Business client will also close.

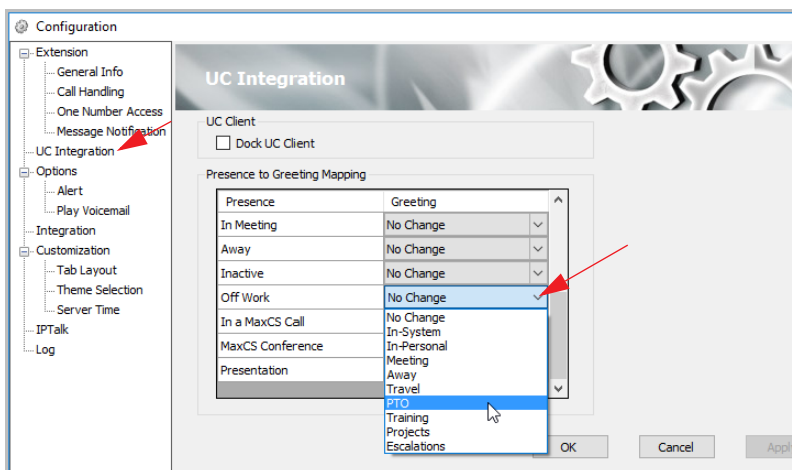
## Mapping Voicemail Greetings to Presences

You can map voicemail greetings to specific Skype for Business Presences. This way, MaxCommunicator will play a specific voicemail message to callers that is based upon your current Presence.

To configure this presence-to-greeting mapping,

1. Click the **Configuration** button in the upper right corner of the MaxCommunicator main window.
2. Select **UC Integration**.





By default, all Presence options are set to “No Change.” This means that your main voicemail greeting will play for all of those Presences.

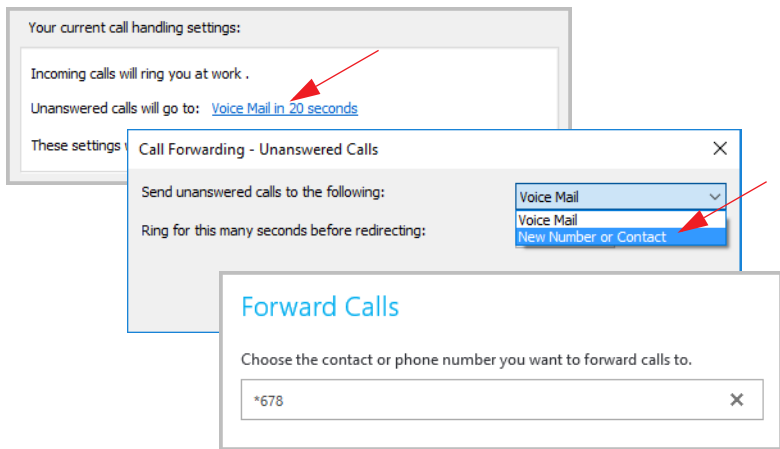
3. To map a specific voicemail greeting to a specific Presence, select the Presence that you want to change, click the down arrow beside “No Change” and select the appropriate voicemail greeting.
4. Click **OK** to save your changes.

## Setting Ring-No-Answer for Skype Calls

By default, when you are not able to answer a Skype for Business call, it disconnects.

To configure Skype for Business unanswered calls to be directed to your MAXCS extension voicemail,

1. In your Skype for Business client, open **Tools > Options**.
2. In the left menu, select **Call Handling**.
3. Click the **Unanswered calls will go to** entry.



4. In the next panel, for the "Send unanswered calls to the following" option, select **New Number or Contact**.
5. In the next panel, enter your extension number preceded by an asterisk character (\*). For example, if your MaxCS bound extension number is 678, you would enter \*678.
6. Specify how many seconds to wait before forwarding the call. Click **OK**.

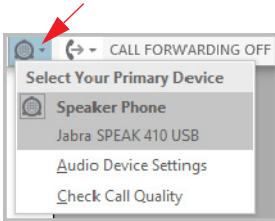
One limitation of this feature is that you will not be able to access your MaxCS voicemail messages from your Skype for Business client. However, you can still call into the IVR and then press #, enter your extension number and password to access voicemail messages, if your IVR system is configured to support this.

## Basic Skype for Business Tasks

This section provides an overview of using the Skype for Business client; refer to the Skype for Business Quick Start Guides for full details: <https://www.altigen.com/support/>.

## Set up Your Audio Device

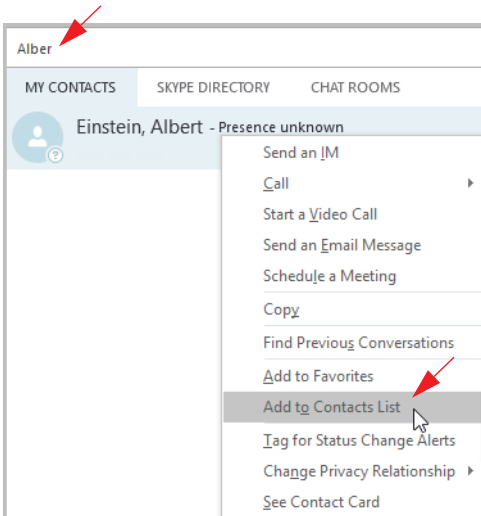
Click the icon in the lower left corner of your contacts list to select your default audio device, adjust settings, and check call quality.



## Populate your Contact List

In some cases, your contact list may be prepopulated for you. If not, add your contacts manually and organize them into groups if you like.

To find a contact, begin typing in the Search box. When you find the correct contact, right-click the name and select **Add to Contacts List**.

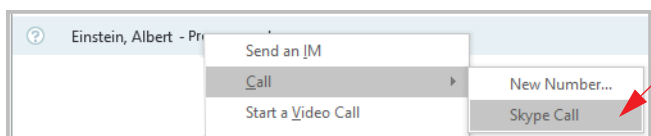


## Answer Skype for Business Calls

When someone calls you on Skype for Business, you will see a pop-up window. Click in the popup, or click **Accept**, to take the call. To reject the call, click **Ignore**.

## Make Skype for Business Calls

To place a Skype for Business call, right-click the contact's name, choose **Call** > **Skype Call**.



## Start a Skype for Business Conference Call

To initiate a conference call, first Shift-Click each contact. After all contacts have been selected, right-click any of them and click **Start a Conference Call**.

## Transfer Skype for Business Calls

To transfer a call,

1. in the Call window, click the **Call Control** icon. From this window, click **Transfer**.
2. In the Transfer window, begin typing the name of the target contact. When the correct entry appears, you have several options:
  - You can select the target contact and click **Transfer**.
  - For more options, hover your mouse over the contact's profile photo. Click the down arrow beside the phone icon, and then select which of the contact's numbers to use. Click **Voicemail** to transfer the caller to the contact's voicemail mailbox.

# Configuring MaxCommunicator

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

- **General Info** — password, default trunk access, and other general settings.
- **Call Handling** — forwarding, busy call, and no-answer call handling; call waiting; number of rings before forwarding; automatic answering.
- **One Number Access (ONA)** — forwarding of specific incoming calls.
- **Message Notification** — how and when you want to be notified about incoming voice messages.
- **UC Integration** — options for UC-enabled agents; refer to “Using MaxCommunicator With Unified Communications” on page 55 for details.
- **Call Alerts** — screen pops and audio beeps.
- **Playing voicemail** — through handset or soundcard.
- **Integration** — integrating with a supported CRM.
- **Display Customization** — tab layout and theme selection.
- **IPTalk** — IPTalk settings.
- **Log** — enabling a log to be created for IPTalk and for this application (MaxCommunicator) to trace errors.

**Note:** Some options may not be available to you.

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

In the Configuration window, click **Apply** or **OK** to save your changes:

- **Apply** saves your changes and lets you continue in the Configuration window.
- **OK** saves your changes and closes the Configuration window.

## General Information

The **General Info** screen lets you edit your password and configure the following general settings for MaxCommunicator.

First Name: Keyur Last Name: Shah

Password: ....

Default Trunk Access: 9

☒ Enable Auto-Dial ☒ Enable SmartTag

**Other**

☐ Release Link Tie (IP Trunk)

☐ Disable Auto Format

☒ Select-N-Dial

Shortcut Key: ☒ Ctrl ☐ Alt ☒ Shift F5

OK Cancel Apply

You can configure these general settings:

- **Default Trunk Access** — The trunk access codes are defined by the system administrator. When you get an incoming call over multiple trunks and cannot issue a return call, the system will automatically select the default trunk access code to place your call.

### Select-n-Dial

Select-n-Dial lets you select a phone number from any window, for example, Internet Explorer, Microsoft Word, Excel, Notepad, and so on, and then press the keys you define here to dial that number. To set up this option,

1. Check the **Select-n-Dial** check box.
2. Select a combination of keys as your shortcut: Select one key from the drop-down list. (You can select from 0-9, A-Z, and F1-F12.) In addition, check either **Ctrl**, **Alt**, or **Shift** or a combination of these keys. For example, your shortcut might be Ctrl+F2 or Alt+Shift+k. Make sure the shortcut you define

is not the same as a shortcut being used in any other program you're likely to have running.

**Note:** The **Alt** and **Shift** keys are not available for Select-N-Dial in Vista or Windows 7.

3. Click **Apply**.

Note:

- If "Enable Auto-Dial" is checked, then Select-n-Dial will make the outbound call.
- If "Enable Auto-Dial" is not checked, then Select-n-Dial will just copy the number to the MaxAgent dial box without dialing out automatically.

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

## Enable Auto Dial

If you check this box, any phone number you dial using the Select-n-Dial method is dialed automatically. The phone number appears in the Number column and the state column displays *Ringing*.

If this box is *not* checked, then a phone number selected by the Select-n-Dial method is displayed in the MaxCommunicator dialer, and you need to click the **Connect** button to make the call.

## Release Link Tie (IP Trunk)

When checked, clicking the **Transfer** button will automatically send "FLASH \*" to release a tie trunk if the incoming call is through an IP trunk. (Option is disabled by default.)

**Important!** Before checking this check box, see your phone system administrator. If your company is using multiple systems and the tie trunk feature, the administrator **needs to have used Enterprise Manager to synchronize the systems**. Otherwise this feature **will not work**.

**Note:** The call being transferred must originate from a supported version of MaxCS.

## Disable Auto Format

If the MAX Communication Server's country code is US/Canada, MaxCommunicator automatically adds the long distance/international dialing prefix (corresponding to the server's country code) when returning a call from voice mail or when making a call from the **History** tab. If this is not appropriate for your setup, check **Disable Auto Format**.

If Disable Automatic Area Code Insertion on MaxClient is selected in MaxAdmin, when Auto Format is enabled, no area code is inserted for 7 digit numbers or 8-digit numbers leading with trunk access code or route access code.

## Use Polycom Phone to Make or Answer Calls

You can configure MaxCommunicator to use your Polycom phone to place calls and answer calls, via the *Use Polycom phone to make or answer calls option*. Refer to the section "*Use Polycom Phone to Make or Answer Calls*" on page 66.

Refer to the MAXCS Polycom user guides for instructions on how to configure this option, along with other Polycom features. These guides can be found on Altigen's Support page:

<https://www.altigen.com/support/>.

## Call Handling

Click the **Call Handling** tab in the Config window to configure incoming call handling for your extension.



## Forwarding All Calls

When you configure your MaxCommunicator to forward all calls, the information is displayed in the status bar.

If you want to forward calls to an external number, select a trunk access code in the drop-down list, then begin with the outside trunk or route access digit and any long distance prefix digits such as **1** and area code.

**Note:** Forwarding calls to a pager is possible but **not recommended** since callers will only hear what is heard when calling a pager and might not know to enter a return phone number unless instructed.

## Do Not Disturb

If you check **Enable Do Not Disturb**, all incoming calls are forwarded according to your **Enable Busy Call Handling** settings, described below.

Checking **Enable Do Not Disturb** here has the same effect as clicking the **DND** button in the MaxCommunicator main window.

## Busy Call Handling and No Answer Handling

You can use these options to specify how you want to handle incoming calls when you're already on the phone or when you can't answer the phone, for example, when you've checked **Enable Do Not Disturb**.

If you want to use the auto attendant and you don't know the number of the phrase or menu you want to use, check with your system administrator.

**Place call in queue** is available only if your system administrator has enabled queuing for you.

## Number of Rings Before Forwarding

The **Number of Rings Before Forwarding** setting pertains to almost all the options in this screen. It is the number of times the phone rings before the system forwards the call to an extension, voice mail, or the auto attendant.

To have MaxCommunicator automatically pick up the call, check the **Enable Automatic Answering after x Seconds** check box and use the arrow keys to choose the number of seconds.

**Note:** The default setting is 0 seconds. If the duration is set to 0, all incoming calls will go to connect state right away. Neither caller nor callee will hear a ring tone.

NEW

If you enable the automatic answering option, then you can set an additional option, *Workgroup Calls Only*. When the *Workgroup Calls Only option* is selected, then only workgroup calls will automatically be answered after the specified interval. When the option is cleared, personal calls will also be automatically answered.

## Call Waiting Options

Call waiting options are available only if the **Enable Busy Call Handling** check box has been checked, but this option is available *only for non-workgroup calls*.

- **Single Call Waiting** — sets up single call waiting. This feature gives an alert tone (audio beep) to indicate that a call is waiting. **Single Call Waiting** must be selected in order to conference incoming calls.

- **Multiple Call Waiting** — enables a “non-workgroup queue” of multiple calls waiting. You must also select the **Place Call In Queue** option under **Enable Busy Call Handling** to enable this option. This allows you to transfer or park the current call before picking up the next call in queue.
- **Live Call Handling** — when enabled, allows a caller to hear a ringback tone when the called party is in voice mail, paging, transfer, or conference state.

## One Number Access (ONA)

If you are expecting calls that you want to receive regardless of where you are, you can have the system forward those calls to you. You must specify the Caller IDs for the calls you want forwarded, and the numbers where you can be reached.

If the system is unable to connect the call (can't identify a Caller ID or can't reach you at *any* of the numbers you specify), the call is sent to your voice mail.

When you answer an ONA call, you may be required to enter your extension password, depending on the configuration for your extension set by your system administrator

## Before You Set Up ONA

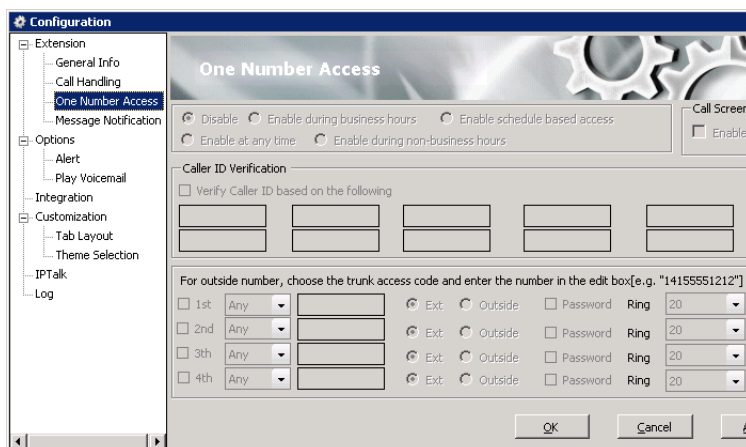
- ONA must be enabled for your extension by your system administrator.
- The settings on your MaxCommunicator **Call Handling** tab must not conflict with ONA. Specifically:
  - **Enable Do Not Disturb** must not be checked. If it is, when your line is busy, all calls will go into voice mail and not to the ONA forwarding numbers you specify.
  - **Enable Forward to** must not be checked. If it is, all calls will be forwarded according to this setting.

See “Call Handling” on page 66 for details on these settings.

## Setting Up One Number Access

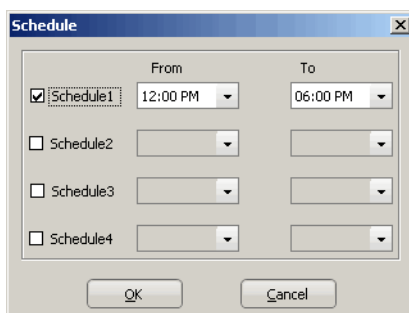
To set up one number access,

1. Click **Extension > One Number Access** in the Configuration window.



2. Select the times you want to be available to ONA callers.

If you choose **Enable schedule based access**, you can set up to four different schedules in the dialog box that pops up:



Check a Schedule box and choose the times you want to be available for ONA from the drop-down lists.

3. Check the **Enable Call Screening** check box if you want the system to prompt the ONA caller to record a caller name to continue ONA.
4. If you want, check the **Verify Caller ID based on the following** check box and then specify the incoming phone

numbers for ONA. If ONA finds one of these numbers on an incoming call, it will forward the call to you.

You can enter up to 10 phone numbers in the **Caller ID Verification** fields. For local numbers, use 7 digits (5555555). For long distance numbers, use 10 digits — area code + local number.

**Note:** If you enter no numbers in the Caller ID Verification fields and ONA is enabled, ONA is made available to every caller.

### Using a Password

You can use a Caller ID Verification field to enter a password number such as “5555” so that a caller who knows this password can use ONA to find you, regardless of where they are calling from. Tell the caller to dial **1** during your personal greeting and then enter the password.

5. Enter the **Forwarding Numbers** to be used by the system to find you when ONA is active. You can set up to four different numbers — extensions or outside numbers. For outside numbers, use the drop-down list to select the trunk access code you want to use. Specify whether the number is an extension or outside number and if a password is required.

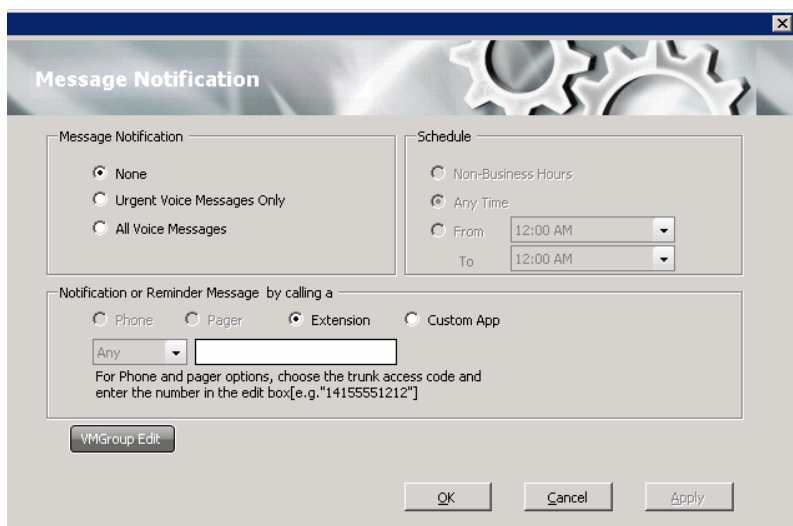
When ONA is active, the system dials the forwarding number(s) in the order from Forwarding Number 1 through Forwarding Number 4. Note that this number order does *not* correspond to the Schedule order — for example, Forwarding Number 2 is *not* used first during Schedule Number 2.

**Note:** If your system administrator has *not* configured your extension to require you to enter your extension password when answering an ONA call, then a call forwarded via ONA that is picked up by a voice mail box, fax machine, or answering machine will connect, and will not try any subsequent Forwarding Numbers. Therefore, if you want ONA to use such an option as a last resort, it should be Forwarding Number 4.

You can set the **ONA ring duration** from 5 to 45 seconds using the **Ring** drop-down lists. Default value is 20 seconds. The system will ring the ONA target during the specified time limit. If the ring time exceeds 30 seconds, the system will play a phrase every 15 seconds (playing time is included in ring time).

## Message Notification

You can specify how and when you'd like to be alerted to new messages when you're away from your desk. Click **Extension > Message Notification** in the Configuration window to display the Message Notification configuration screen.

The screenshot shows a window titled "Message Notification" with a gear icon in the background. It contains three main sections: "Message Notification" with radio buttons for "None", "Urgent Voice Messages Only", and "All Voice Messages"; "Schedule" with radio buttons for "Non-Business Hours", "Any Time", and "From" (with time pickers for "From" and "To", both set to 12:00 AM); and "Notification or Reminder Message by calling a" with radio buttons for "Phone", "Pager", "Extension", and "Custom App". Below these is a dropdown menu set to "Any" and an empty text box. A note states: "For Phone and pager options, choose the trunk access code and enter the number in the edit box[e.g. '14155551212']". At the bottom are buttons for "VMGroup Edit", "OK", "Cancel", and "Apply".

You can set these notification options:

- **The types of messages** about which you want to be alerted: none, urgent voice messages only, or all voice messages.
- **Schedule** — Select during what hours you want to be alerted.
- **How and where to notify you** — Select an option in the **Notification or Reminder Message by calling a** section. If you want to use an outside number, use the drop-down list to select the trunk access code, and then type in the number.
- **Voice Mail Groups** — You can set up and edit voice mail groups.

**Note:** You can also configure Message Notification through the Altigen Voice Mail System.

## Working with Voice Mail Groups (Distribution Lists)

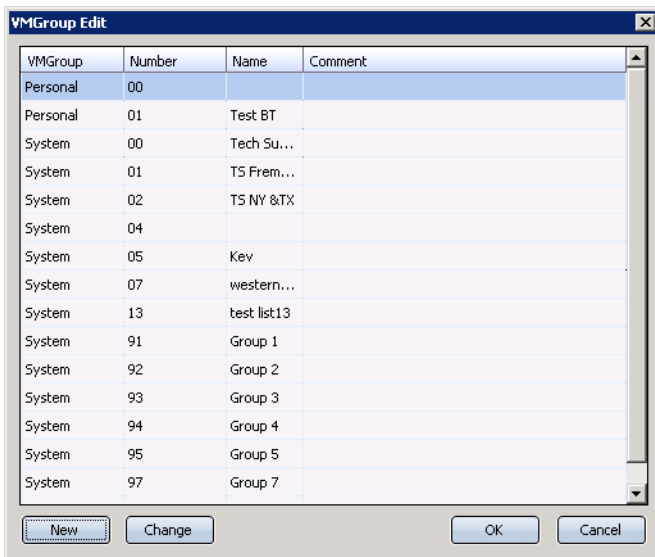
You can set up voice mail groups (distribution lists) to forward messages to multiple recipients at the same time. You can set up to 100 personal voice mail (VM) groups, each with 64 members. Group members can be any extension or another voice mail group.

There are two types of voice mail groups you can use:

- **System-based groups** are set up by the system administrator. You can use but not edit these lists in MaxCommunicator. You can, however, add a comment that is displayed in your MaxCommunicator.
- **Personal groups** can be set up and modified in MaxCommunicator or in your Altigen Voice Mail System.

## Working on Voice Mail Group Lists

To work on your personal voice mail groups, on the Message Notification page, click the **VMGroup Edit** button.



The screenshot shows a dialog box titled "VMGroup Edit" with a close button (X) in the top right corner. Inside the dialog is a table with four columns: "VMGroup", "Number", "Name", and "Comment". The table contains the following data:

VMGroup	Number	Name	Comment
Personal	00		
Personal	01	Test BT	
System	00	Tech Su...	
System	01	TS Frem...	
System	02	TS NY &TX	
System	04		
System	05	Kev	
System	07	western...	
System	13	test list13	
System	91	Group 1	
System	92	Group 2	
System	93	Group 3	
System	94	Group 4	
System	95	Group 5	
System	97	Group 7	

At the bottom of the dialog box, there are four buttons: "New", "Change", "OK", and "Cancel".

## Creating a Personal Voicemail Group

1. Click the **New** button in the VM Group Edit dialog box.

	Type	Number	Name
<input checked="" type="checkbox"/>	Ext	100	Enterprise Desk
<input type="checkbox"/>	Ext	101	Harry Potter
<input type="checkbox"/>	Ext	102	Ron Weasley
<input type="checkbox"/>	Ext	103	Severus Snape
<input type="checkbox"/>	Ext	104	Hermione Granger

2. Click the drop-down list to select a **Group ID**.
3. Enter the VM Group **Name** and any **Comments**. These are optional but will help you identify the group.
4. Select the member extensions by selecting the check box next to each extension.
5. When finished, click **OK**. Click the **Clear** button to deselect all extensions or click **Cancel** to exit without saving your edits.

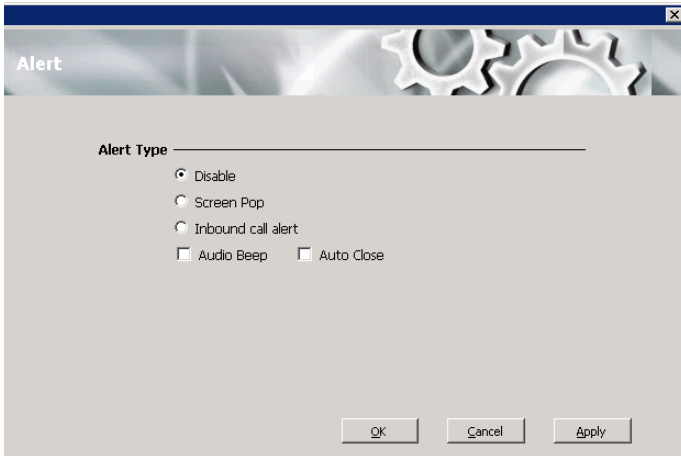
## Updating a Personal Voicemail Group

1. Click the **VM Group Edit** button. The VM Group Edit dialog box opens.
2. Select the group you want to change, and click the **Change** button.
3. Make any changes you need to make for the group name, comments, or members. To add or remove a member, select or deselect the check box next to the extension.
4. Click **OK**.



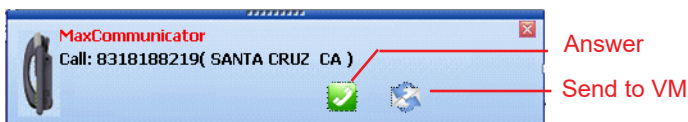
## Call Alert Options

If you want MaxCommunicator to inform you when you have a call, specify your desired method(s) in the Configuration window's **Options > Alert** screen.

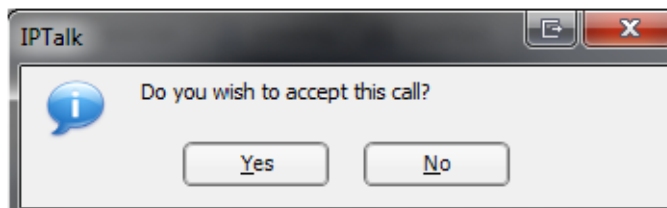


You can set these alert options:

- **Disable** — Disables screen pop.
- **Screen Pop** — When a call comes in, the MaxCommunicator main window opens. You can then answer the call or perform other MaxCommunicator actions. For MaxCommunicator to pop up, you cannot have closed the application entirely, but it can be shrunk or minimized.
- **Inbound call alert** — When a new call comes in, a window pops up and gives you the option to answer the call or send it to voice mail:



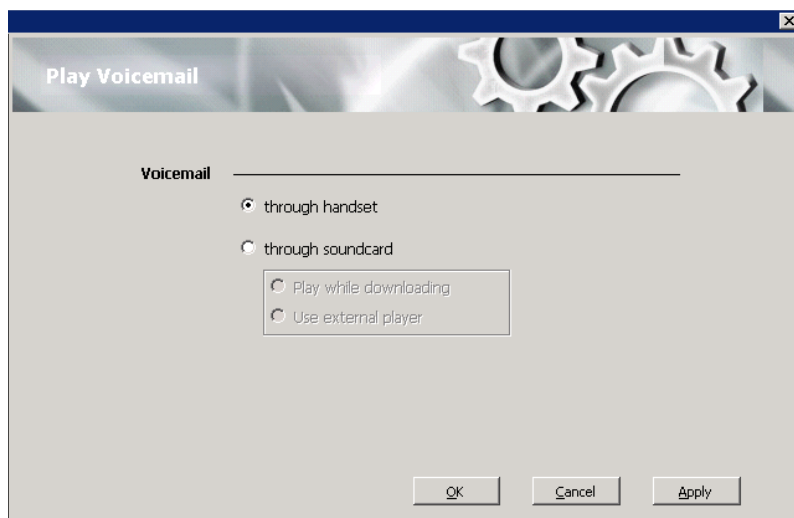
**Note:** When using IPTalk, the pop-up window allows you only to answer or decline the call; it does not allow you to send the call to voicemail:



- **Audio Beep** — Your computer beeps you when you have a call.
- **Auto Close** — The pop up window closes once you have finished with the call.

## Voice Mail Play Options

Choose **Options > Play Voicemail** in the Configuration screen to set voice mail play options.



You can choose to play your messages on your phone set, or play them on your sound card and speakers. If you choose to play them on your sound card, you can have the message play as it downloads, or you can download it completely and play it on an external media player.

## CRM Integration

MaxCommunicator can access phone numbers from your Microsoft Outlook or Outlook Express database. During installation, the install program reads which applications you have installed on your system.

Configure CRM integration in the Configuration window's **Integration** screen:

**Integration**

☒ **User Database Selector**  
Specify the source CRM application, Outlook, Outlook Express etc, to use with AltGen MaxAgent and allow changes in Contacts tab window

Select current database: Outlook Select Outlook Folder ☐ Private Folder Only

☐ Update database when click "Ok" button ☐ For Screen Pop Match Digits 7

☐ **Enable OCS client**

Sign in URL Sample: username@OCS-domain

Server

☐ Use Window default credentials

Domain

User Name Sample: username. Do not add domain prefix

Password

OK Cancel Apply

**Use Database Selector** — Check this check box to allow integration of your company's CRM database with your MaxCommunicator, then select your CRM program from the **Select current database** list.

**Private Folder Only** — If an organization has many large public contact folders for outlook, users can eliminate the time it takes to synchronize all of those folders by checking a new option. Check the **Private Folder Only** checkbox to synchronize only the Private Contact folder. Clear the checkbox to also synchronize Public Contact folders.

**Update database when click “OK” button** — When you check this check box, MAX Communication Server refreshes the data MaxCommunicator accesses from the database.

**Note:** If you select Outlook, MAX Communication Server will load all the subfolders and data in your main Contacts folder, which will take a few moments. Once the data is loaded, you can close the Configuration window, reopen it, and click the **Select Folder** button that now appears to choose which Contacts subfolders you want to use.

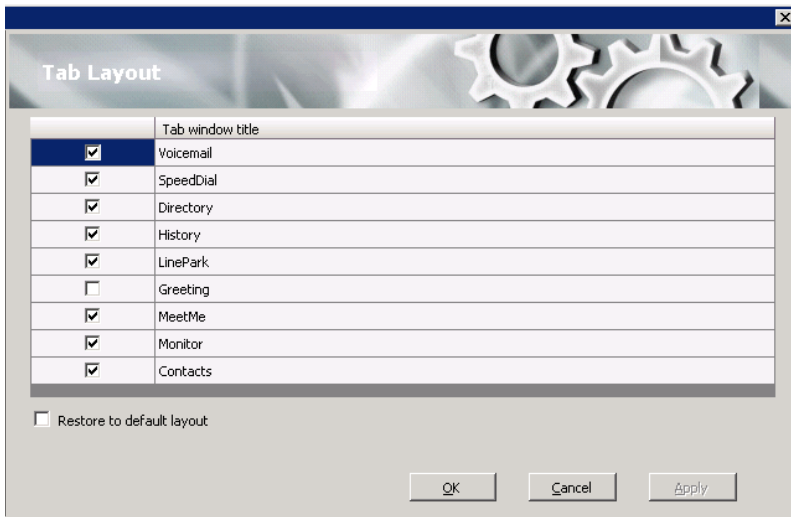
**For Screen Pop** — Check this box if you want a contact’s contact page to pop up when you get a call from that contact.

**Match Digits** — Select the number of digits to match for caller ID. Matching starts from right and moves left. This option is for calls that go through IP and for international calls that have a digit prepended, like 0. For example, if you choose 7 (the default) in the Match Digits field, and the number is 10.10.10.6- 915102529712, MaxCommunicator would match the last 7 digits, or 2529712, to identify the caller for you.

**Use Windows default credentials** — Check this box to use Windows default credentials.

## Tab Layout

You can choose which tabs you want to display in MaxCommunicator by right-clicking in the space to the right of the tabs in the main window and selecting the tabs you want to show. When no tabs are displayed in the main window, you can click **Voicemail** (which displays the **Voicemail** tab), then right-click in the space to the right of the **Voicemail** tab. Or you can configure the tabs in the Configuration window’s **Customization > Tab Layout** screen.

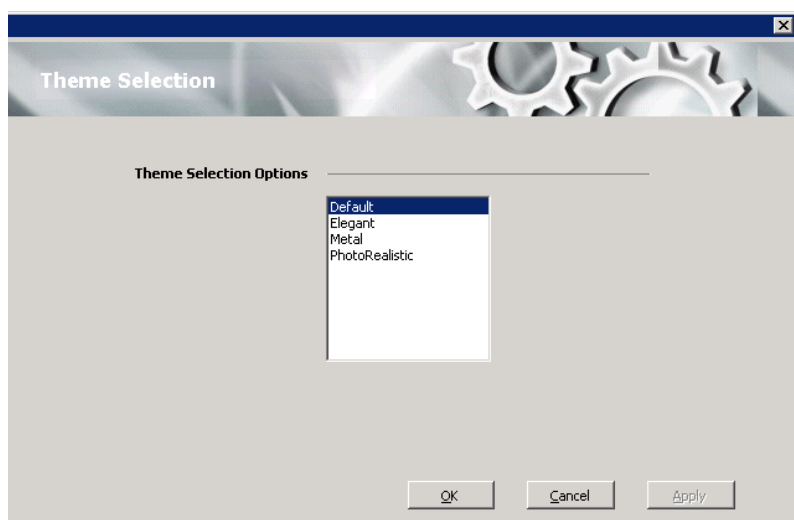


Check the tabs you want to display in MaxCommunicator, and click **OK**.

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

## Theme Selection

Choose the display theme of your MaxCommunicator in the Configuration window's **Customization > Theme Selection** screen.



Select a theme and click **Apply** to see the change, or click **OK** to accept the theme. The theme changes without restarting MaxCommunicator.

## IPTalk

If you're using IPTalk, set the options in the **IPTalk** configuration screen:

**IPTalk Option**

☐ Echo Suppression

ToS(Hex)

802.1

Voice Through

Ring Through

SIP Transport

☐ TLS ☐ SRTP

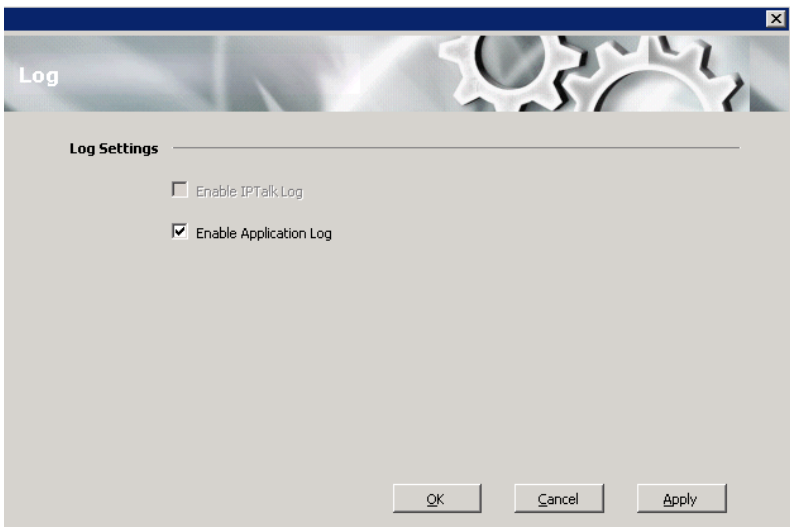
OK Cancel Apply

- **Echo Suppression** — Check this check box if you are experiencing echo.
- **ToS(Hex)** — The ToS byte indicates the type of service. For IPTalk, you need high priority service, and the default of “0” set here indicates high priority service. However, if your company router supports DSCP EF, then set this field to “A0”. The ToS value is gateway-based. For guidance, see your system administrator.
- **802.1** — This setting is related to the priority given to voice packets traversing your network. For guidance on setting this value, see your system administrator.
- From the **Voice Through** drop-down list, choose the sound card that will carry the incoming and outgoing voice. It could be a sound card in your PC, or it could be a USB-based sound card in your headset system.
- From the **Ring Through** drop-down list, choose the device that will carry the incoming ring. When you’re away from your desk, you may prefer the ring to come through your PC speakers, rather than your headset system.

- **SIP Transport** — These settings secure the SIP signaling messages and the RTP. SIP signaling is secured using transport layer security (TLS). RTP or SIP-associated media is secured using the secure RTP (SRTP) protocol. For guidance with these settings, see your system administrator.

## Log

If you want the system to keep error logs for troubleshooting, check the appropriate box in the **Log** screen in the Configuration window. Logs are stored in your \\Documents and Settings\\*username*\\Local Settings\\Application Data\\Altigen\\MaxCommunicator folder.



The **Enable IP Talk Log** check box is available only if you're using IP Talk. The Application log is for MaxCommunicator.



## Using MaxCall

MaxCall is intended for agents involved in marketing campaigns and other campaigns where the same message must be delivered over and over. Using MaxCall, you can record scripts, called phrases. Then, when you dial a call and the other party answers, by clicking a button you can hand the call over to the MAXCS system, which then plays the phrase you selected. This frees your extension to make the next call. The feature is available on the MaxCall tab.

A MaxCall license must be assigned to your extension before you can see the MaxCall tab.

## Logging in to MaxCall

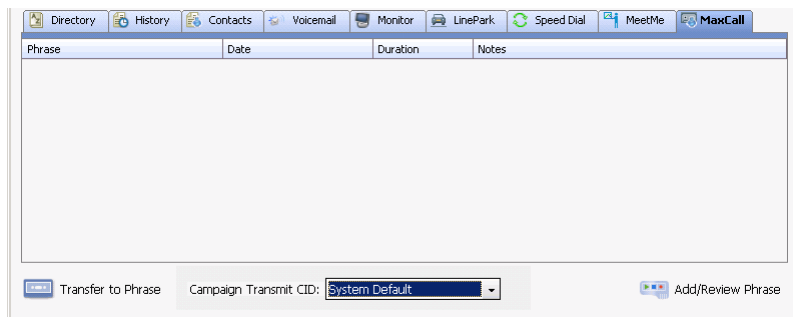
When you log in to MaxCommunicator, check the **Enable MaxCall** check box.

The image shows the MaxCommunicator login window. It has a light gray background with a blue and white logo on the left and the text 'MAXCOMMUNICATOR' in blue. In the top right corner, there is a small logo for 'ALTIGEN'. The login fields include 'Server Name' with a dropdown menu showing '10.30.9.46', 'Extension' with a text box containing '3500', and 'Password' with a masked text box showing four dots. Below these fields are two checkboxes: 'Enable IPTalk softphone' (unchecked) and 'Always save password' (checked). The 'Enable MaxCall' checkbox is checked and is highlighted with a red circle. At the bottom right, there are two buttons: 'Sign in' and 'Cancel'.

When you are logged in, the MaxCall tab is available to you.

## The MaxCall Tab

The MaxCall tab looks like the following figure.



The MaxCall tab has the following columns:

- **Phrase** — List of phrases, or scripts, that you have recorded. These are stored on the MAXCS server.
- **Date** — The date the phrase was recorded or last modified.
- **Duration** — The duration of the phrase in hh:mm:ss format.
- **Notes** — Notes you enter about the phrase. Double-click the Notes cell to enter notes.

The drop-down list at the bottom displays campaign names and the transmit caller ID for each campaign.

## Using a Phrase

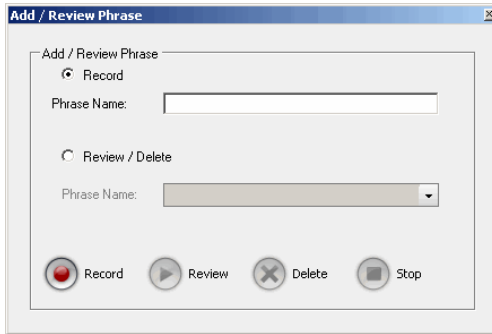
1. From the **Campaign Transmit CID** drop-down list, select the campaign applicable to your call. If the callee's phone displays caller ID, his display will show the caller ID configured for this campaign instead of the actual caller ID.
2. Make a call.
3. If you get the other party's voice mail, click the **Transfer to Phrase** button. MAXCS takes control of the call and plays the selected phrase. Your phone is released so you can make another call.

**Note:** Instead of selecting the phrase before making a call and then clicking the **Transfer to Phrase** button, you can double-click on a phrase after the call is connected.

## Recording a Phrase

To record a message to add to the phrase list,

1. Click the **Add/Review Phrase** button. The Add/Remove Phrase dialog box appears.



2. Select the **Record** button.
3. Enter a name in the **Phrase Name** text box.
4. Click the **Record** button. Your phone will ring.
5. Answer the phone and record the message.
6. Click the **Stop** button. The message is saved as a phrase on MAXCS, and MAXCS notifies you and adds the new phrase to the phrase list in MaxCall. The length of the phrase is added to the **Duration** column.

## Reviewing a Phrase

To review a phrase,

1. Click the **Add/Review Phrase** button.
2. Select the **Review/Delete** button.
3. Select a phrase to review from the drop-down list.
4. To delete the phrase without listening to it, click the **Delete** button. You receive a confirmation message. The phrase is deleted from MAXCS and from the MaxCall list of phrases.
5. To review the phrase, click the **Review** button. Your phone will ring.

6. Answer the phone and listen to the phrase.
7. You can delete the phrase after listening or simply close the dialog box.

# Plantronics Headset Support

This appendix describes how to configure and use specific Plantronics headset models with MaxCommunicator.

The following headsets have been tested and certified for this release:

- W740-M
- W420
- Voyager Legend UC

Plantronics headsets are supported on these MaxCS 8.5 Update 1 clients:

- MaxAgent
- MaxCommunicator

## Headset Installation and Configuration

1. Follow the Plantronics Headset Quick Start Guide to set up the headset and load the Plantronics Spokes software.
2. Open the Plantronics Hub application and set *Audio Sensing* to **On**. Save the change.
3. Run the MaxCommunicator *setup.exe* file and follow the instructions to complete the installation.
4. In MaxCommunicator's *Settings* section:
  1. Set the *IPTalk Voice Through* and optionally the *Ring Through* options to your Plantronics device.
  2. Check the option *Plantronics Headset Integration*.
5. Save your changes.

## Using Plantronics Headsets with MaxCS

Use the Call Answer / End button to:

- Answer a call
- End a call

- Resume a call that was placed on hold

Note that you cannot place calls on hold via the Plantronics headset.

## Known Issues with Plantronics Headset

Following are known issues with Plantronics headset support in this release.

- When you press the flash button in MaxCommunicator to transfer a call, you cannot press the Plantronics button to disconnect.
- When the *Plantronics Headset Integration* option is enabled and multiple calls are active, intermittently only one ring tone is played when call comes out of personal queue. You can still see the incoming call popup.
- When the *Plantronics Headset Integration* option is not enabled, ring tones may be cut off in some headsets.

## Operational Notes

- While your Plantronics headset is integrated with a MaxCommunicator, you must close your Lync/Skype client; you cannot enable the headset with a MaxCS client and with Lync/Skype at the same time.
- The #81 and #82 features are not supported on Plantronics headsets.
- Note that calls will always ring on whatever audio device you set as the default device on your computer.

## APPENDIX A

### Errors and Troubleshooting

The following errors may be displayed as login or connectivity errors.

Error Message	Description	Solution
MAX Communication Server connection limit has been exceeded.	No license was found OR more than allowed number of MaxCommunicator users have attempted to log on.	Maintain the number of MaxCommunicator license keys or add additional session licensing.
Cannot connect to AltLink. Please check server name or network connection.	You are not connected to MAX Communication Server.	Check the server field (IP address or DNS name) by: 1. Pinging the network server address OR 2. Try using the IP address of MAX Communication Server (if using the DNS name in the server field).
Cannot access voice mail list while mail box in use.	Mail box is in use by the Altigen Voice Mail System and is temporarily unavailable.	Wait awhile, then try again.
Mail service is unavailable. Please check with your administrator.	Voice mail service is not enabled on MAX Communication Server.	Make sure voice mail service is started.
Please register AlplInterface.dll (regsver32 AlplInterface.dll).	MaxCommunicator uses this dll to communicate with MAX Communication Server. It should be registered in user system.	Re-register this file. Type in DOS command window, <b>regsver32 AlplInterface.dll</b> Change directory to MaxCommunicator directory, type <b>regsver32 AlplInterface.dll</b>

Error Message	Description	Solution
You have entered an invalid password. Please try again.	The password is incorrect.	Enter your extension password.
Cannot use "IP Extension integrated with IPTalk."	You tried to log in with the IP extension option without being assigned an IPTalk License.	Confirm that your extension is set up as an IP extension with dynamic IP address and that an IPTalk License has been assigned.
The version of MaxCommunicator on your desktop is out of date.	The installed version of MaxCommunicator does not match the version of MAX Communication Server on the system server.	Upgrade MaxCommunicator to match the current running version of MAX Communication Server.

## Troubleshooting Remote Connectivity

If problems occur connecting to your company's MAX Communication Server from a remote location, they may be due to a failure to connect to your ISP or due to firewalls at your office preventing direct access to the MAX Communication Server.

As a test, you can choose **Run** from the Windows **Start** menu, then enter

```
Ping <IP address> [ENTER]
```

where <IP address> is the MAX Communication Server system you want to connect to. An example of the IP address format is 123.234.231.143

If you do not get a response, contact your LAN administrator for support.

Also, check to verify that the necessary ports are open.



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## Numerics

802.1 81

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