MaxCommunicator Web Manual

MAX Communication Server Release 9.0.1

January 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
Web site: www.altigen.com

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About MaxCommunicator Web

MaxCommunicator is a call management application for the general user.

In MaxCS Release 9.0, *MaxCommunicator Web* is a web application that works with MaxCS. With this application, you can perform most call actions, including call transfers, call forwarding, conference calls, and other common tasks.

Features Not Supported

The following features are not supported in this Web version of MaxCommunicator. If you need any of these features, you should continue to use the Windows version of MaxCommunicator.

- Windows drag-and-drop layout changes
- Minimized top/bottom task bar
- Display theme
- Hide/Display call control buttons, tabs and columns
- Screen pop
- Smart tag
- Select-n-Dial
- One Number Access
- MaxCall
- Skype for Business Integration
- Remote Extension/Groups for Enterprise Management
- Voice Mail groups (Distribution lists)
- CRM Integration
- UC Integration
- #82 (Disable dial tone)
- MaxCS server with multiple network interface cards

Licensing

The following Altigen licenses are required:

- MaxCommunicator requires a MaxCommunicator seat license for each user, or a MaxCommunicator 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 MaxAdmin by selecting **License** > **Client SEAT License Management** from the main menu.

C H A P T E R 2

Getting Started

In order for you to use MaxCommunicator Web, your administrator must perform the following setup tasks for you:

- Apply a MaxCommunicator License to your account
- Enable your account use MaxCommunicator Web

How you open MaxCommunicator depends upon how your administrator set up your account.

Opening MaxCommunicator

You can open MaxCommunicator in one of two ways:, launch the application from the Service Hub or open MaxCommunicator directly through a URL provided by your administrator.

Important! When you open MaxCommunicator, you will be prompted for permission to use your microphone for calls. You must allow this access in order to take and make calls with the application.

Opening the Application from Service Hub

Users can open a service called Service Hub, and then click the MaxCommunicator icon within the Service Hub. Your administrator will provide you with your login credentials to the Altigen Service Hub.
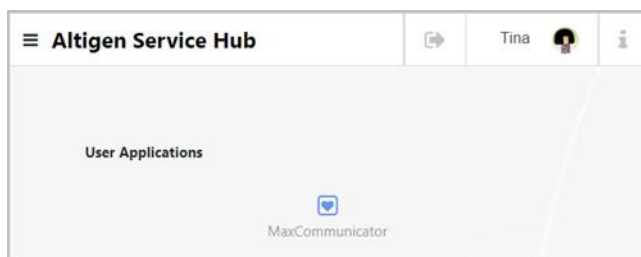
Opening the Application Directly

If your administrator provides a URL to access MaxCommunicator Web, navigate to the URL in your browser and enter the login credentials provided by your administrator.

Overview

Once you log into MaxCommunicator, the main window opens to your Dashboard. (To return here at any time, just click the **Activity** tab.)

Your name, avatar, and status appear here

Click this icon to access program defaults and options
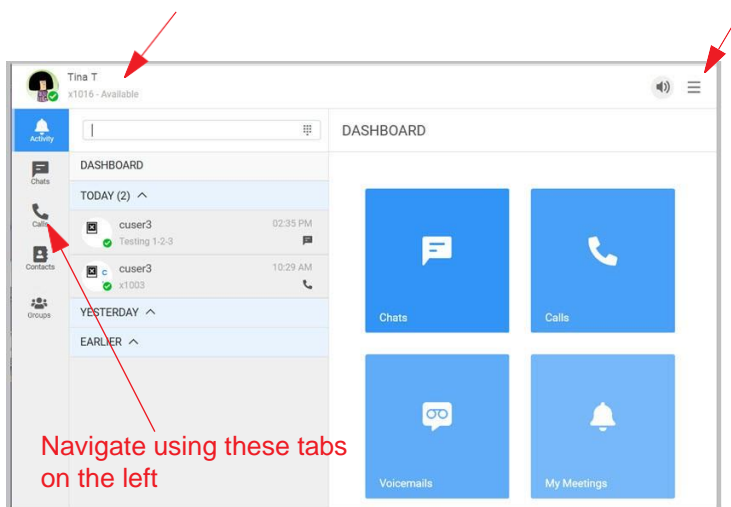
Navigate using these tabs on the left

The tabs on the left reflect the main aspects of the application:

Activity / Dashboard - The Dashboard shows you your recent chats and calls. See *The Dashboard* on page 7.

Chats - Shows your recent chats. See *Working With Chats* on page 9.

Calls - Shows calls, voicemail, call history, call monitoring, and line park. See *Handling Calls* on page 21.

Contacts - Shows contacts you've added as Favorites, and shows a Directory of all of your contacts.

Groups - Shows activity for any groups that you belong to. See

Using Groups on page 43.

If you make your browser window more narrow, those tabs will move from the left edge to the top.
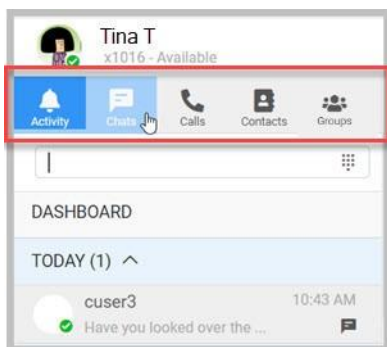
Settings

Open the Settings panel to access various application-wide options or defaults. Just click the 'More' icon and choose *Settings*. See *Configuring MaxCommunicator* on page 53 for details.
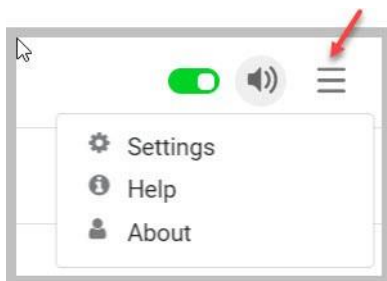
Note that this menu is also where you can access the online Help file for MaxCommunicator Web.

Changing Your Status

MaxCommunicator pulls your state or presence automatically, from various places. For example, your presence will automatically be changed in these conditions:

- When you are in a MaxCS Call (call connected state)

- When you are in a MaxCS Conference (conference state)

- When you sign out of the application (offline)

- When you are in a meeting that is in your Outlook calendar

To change your status manually, click your avatar (profile picture) in the top bar and make your selection.
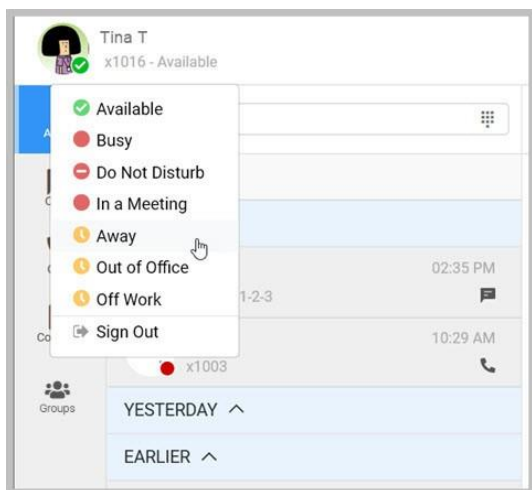
- **Available**
- **Busy**
- **Do Not Disturb**
- **In a Meeting**
- **Away**
- **Out of Office**
- **Off Work**

Your system administrator may have configured additional states for your organization, in addition to the ones listed here that are included by default.

The Dashboard

Click **Activity** to see your Dashboard.

Once you have been using the product for a few days, the Dashboard will show you your recent activity, including recent chats, calls, and the number of voicemail messages you have.
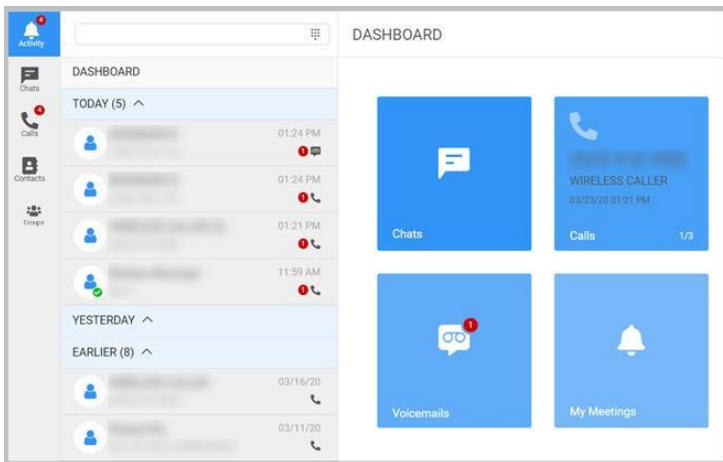
Signing Out of MaxCommunicator

To log out of MaxCommunicator, click your avatar in the top area and click **Sign Out**.

Working With Chats

There are several different types of chats in MaxCommunicator:

- **Direct chats** — These are one-on-one chats with one other contact.

  Be aware that Direct chats cannot be converted to group chats; in other words, you cannot add another contact to a Direct chat.

- **Direct Group chats** — These are chats with multiple contacts. With Group chats, you can invite additional contacts to join the discussion.

- **Channel chats** — These are chats within Group channels; see the chapter *Using Groups* on page 43.

The Chats Panel

You can see recent chats on your Dashboard; click a chat to open that conversation on the Chats tab.
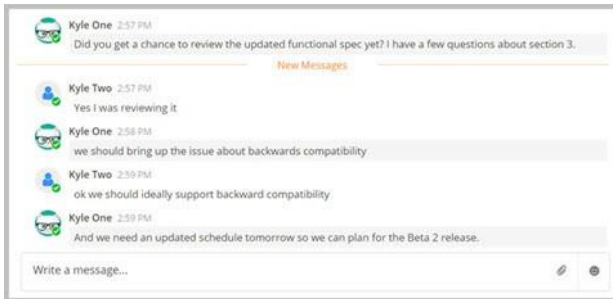
Ways to Start Chats

There are many ways to initiate a chat in MaxCommunicator.

- Click a chat on the Dashboard to continue that conversation

- Click the *Chats* tab, and click a chat on that tab to continue the conversation

- Click the *Contacts* tab, select a contact and click the Chat

icon in the contact's information panel.

- To begin a Group chat, on the Chats tab click the Plus sign beside *Recent Chats* (see *Creating Group Chats* on page 12)
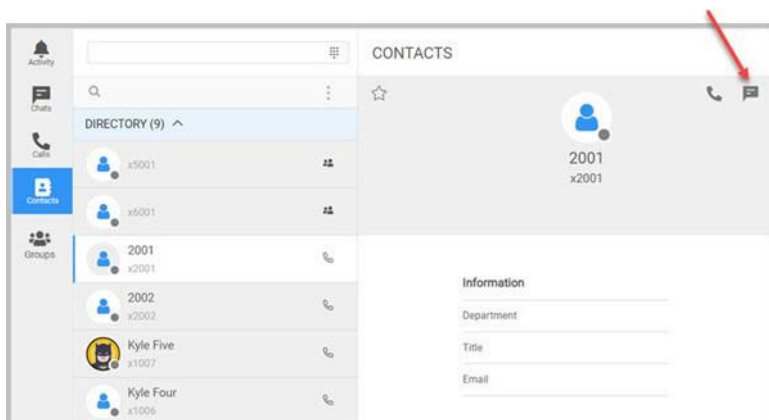
Composing Messages

To send a message, just type your message into the text field and press **Enter** to send it.

You can embed emojis in your messages by selecting them from the list.
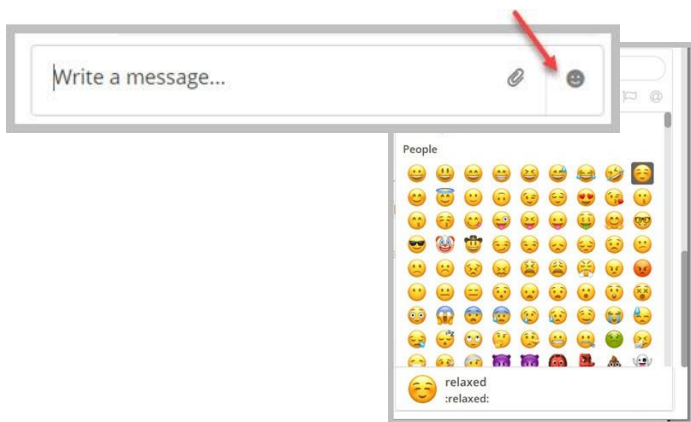
You can also include emojis by typing a colon character and typing the image. For example: :smile:

You can use formatting within your messages. For example:

text or *text* will italicize the enclosed text

text will make the text within the symbols boldface

~~strikeout~~ will make the text within the symbols strikethrough

[hyperlink](http://altigen.com) will insert a hyperlink

Mentioning Contacts in Messages

You can mention other contacts in messages. Those contacts can view their mentions as needed.

If the contact has enabled desktop notifications for mentions, then the contact will see an alert that they were mentioned.

To mention a contact, type the 'at' sign (@) and then begin typing the contact's name. A list of names will appear; click the contact that you want to mention.

Adding Reactions to Messages

If someone posts a message that you want to show a reaction to, highlight the message and click the *React* icon (a smiley face) in the message. Then click the emoji that you want to use.

Replying to a Specific Message

If someone posted a message earlier in a chat that you want to reply directly to, highlight that message and click the Reply icon (a left arrow). Then enter your response.

Your response will not appear in-line with the original message; instead, it will appear as a new message, in chronological order. Your post will include the text of the specific message you responded to.
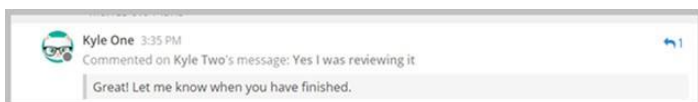
Sending Files in Chats

During chats, you can attach a file to send to the other person by clicking the attach icon and selecting the file.

You can attach up to five files per post.

Files can be up to 50MB in size.

Creating Group Chats

To create a chat with several contacts,

1. On the *Chats* tab, click the Plus sign beside *Recent Chats*.
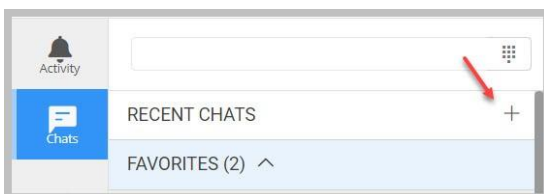
2. From the list of contacts that opens, click the Plus sign for the

contacts that you want to include in this chat. Their names will appear at the top as you add them.
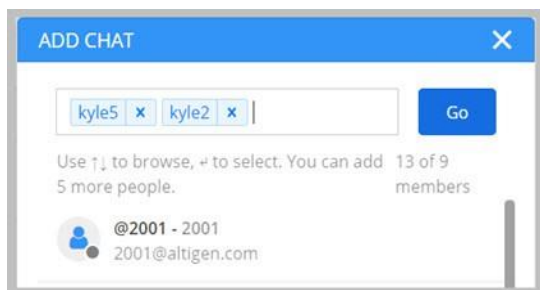
If you want to remove a contact that you have already added, click the delete icon beside that contact's name.

3. Once you have selected all contacts for the chat, click **Go**.

Once you have started a group chat, you can add other members later as needed. Click the down arrow beside the chat header and click **Add Members**.
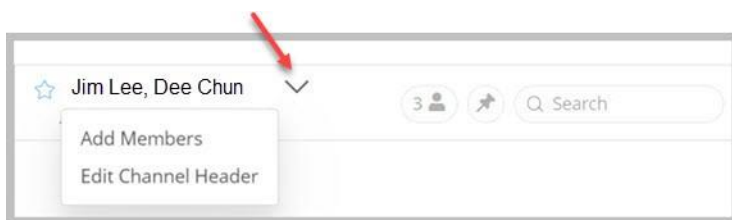
Managing Your Chat Sessions

Over time, you will probably accumulate many different chats.

You can remove chats that are no longer useful. You can also search chats for specific information, and you can pin specific messages in chats to make the details easy to find. You can mark chats as Favorites, to make them easy to find.

Click a topic for details:

Mark a Chat as a Favorite

If you refer to a specific chat frequently, you may want to mark it as a Favorite to make it easy to return to. This way, it shows up in your *Favorites* list at the top of the chat page.

To mark a chat as a Favorite, click the star in the chat header.

To remove a chat from your Favorites list, click the star again to unselect it.

Adding Headers for Chats

To help clarify the purpose of each chat, you can add descriptions, or Headers, to them.

You add headers to Group chats using a different method than with Direct chats.

To add or edit a header for a Direct chat,

1. In the Chat panel, scroll up to the very beginning of the chat.

2. Click **Set a Header**.
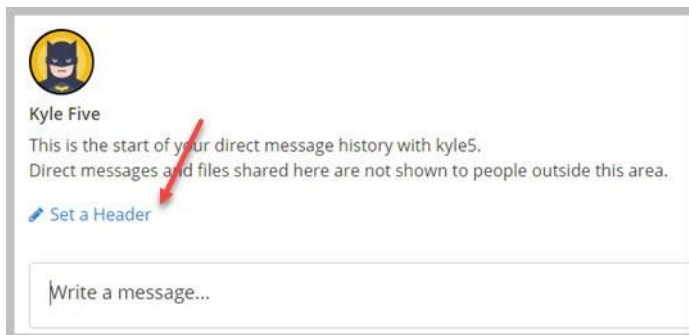
3. Type in your header and click **OK**.
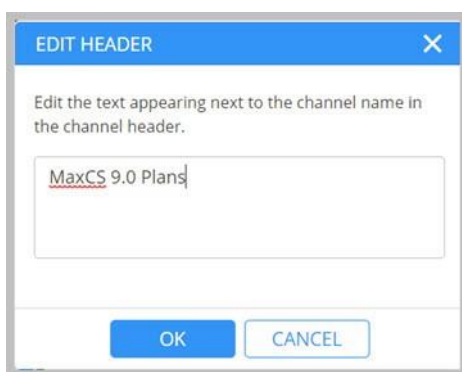
To create or edit a header for a Group chat,

1. Click the down arrow beside the names of contacts in the chat.

2. Click **Edit Channel Header**.
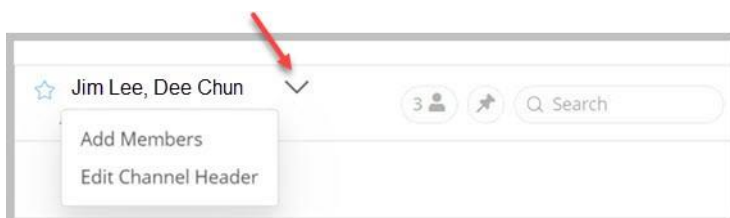
3.   Edit or type in a header name and click **OK**.

Removing Chats from Your Chat List

To remove a chat from your list, click the *Delete* icon in the chat box.
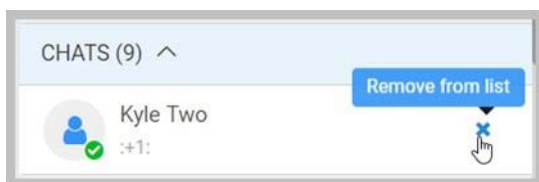
Note that if you begin a new chat with that contact (or that same group of contacts) at a later date, then the previous chat will appear and you will continue that thread.

Pinning Messages Within Chats

You can pin important messages in a conversation, to make them easy for chat members to find in the future.

When you pin a message, all members of that chat can view the pin. (This is different from *flagging* a message, where only you can see your flags.)

To do this, highlight the specific message and click the *More* icon, and then click **Pin to channel**.

To unpin a message, click the *More* icon, and then click **Un-pin from channel**.
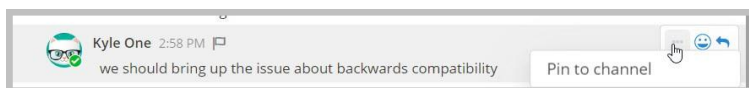
Showing/Hiding Pinned Messages

You can show or hide the list of Pinned messages as needed. Just click the **Pin** icon in the chat header. To hide the Pinned message panel, click the **Pin** icon again or click the right arrow icon on the

right.
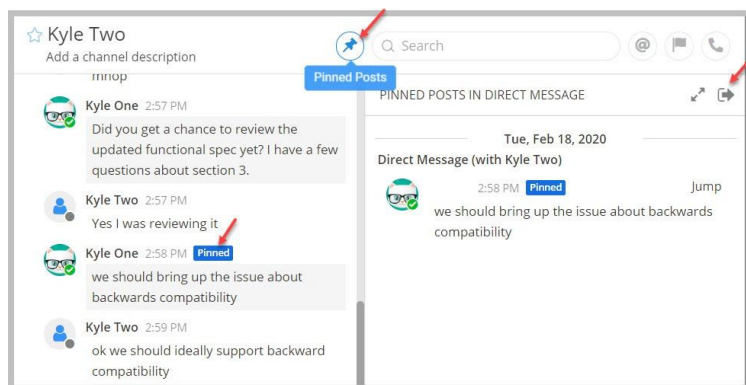
Flagging Messages in Chats

You can flag messages for personal follow-up. Flags are private reminders just for you.

Other chat members cannot see your flags, so if you want to highlight information for **all** chat members, you should pin a message instead of flagging it.

You will not see flags that other contacts have flagged for themselves.

To flag a message for follow-up,

1. Select the message.

2. Click the small Flag icon.

To unflag a message, select the message and click the small flag icon again.

Showing/Hiding Flagged Messages

To view all of your flagged messages in all chats, at the top of the Chats panel, click the Flag icon.
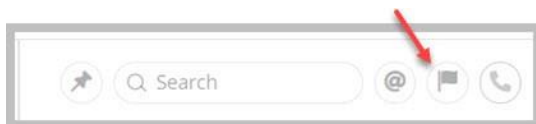
A panel opens on the right showing all flagged messages. To jump directly to a specific flagged message, click **Jump**. That specific chat will open in the middle panel, with that message selected.
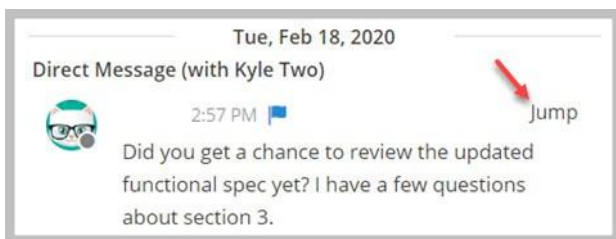
To hide the Flagged Message panel, click the Flag icon again or click the right arrow at the top of that panel.

Searching for Details in Chats

You can search across chats for specific pieces of information.

The following figure shows how a search for the word "schedule" found a message in the chat that contains that word.
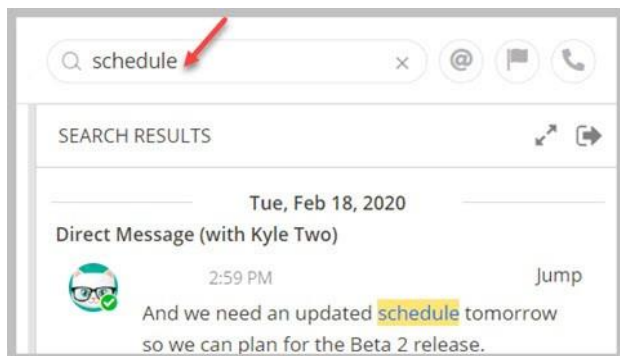
To close the Search results panel, click the right arrow at the top of that panel.

Viewing Chats Where You Were Mentioned

To view messages where you have been mentioned, across all chats, click the @ icon at the top of the chat panel.

A new panel opens, listing all messages where you were mentioned.

To close the panel, click the right arrow at the top or click the @ icon again.

C H A P T E R 4
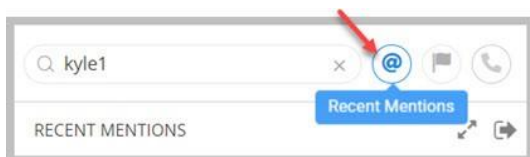
Handling Calls

MaxCommunicator call handling-related functions include:

- Answering calls, see page 23
- Dialing out, see page 25
- Placing calls on hold, see page 27
- Using call waiting, see page 28
- Transferring calls, see page 28
- Conferencing, see page 29
- Recording Calls, see page 31
- Using account codes, see page 32
- Using voice mail, see page 32
- Monitoring other extensions, see page 35
- Viewing the history of calls, see page 38

Poly headset integration, see "Poly Headset Integration".

Agents using Polycom phones should review the section *MaxCommunicator with Polycom Phones* on page 41 for additional instructions.

Enable IPTalk

If your extension is an IP extension and you will be using a headset that connects to your computer, open **Settings** and on the **IP Talk** tab, select the *Enable IPTalk* option and specify your device. Note that an Altigen IPTalk license must be assigned to your extension.

A quick way to enable/disable IPTalk is via the toggle at the top of the page, beside the volume widget.
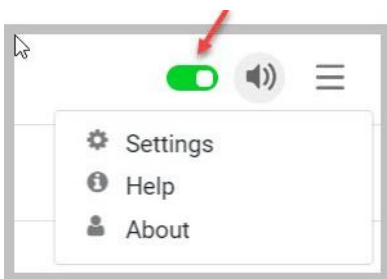
An Altigen-certified USB headset is recommended for IP extensions using IPTalk (your phone system administrator or Altigen representative can recommend headsets).

To make and receive calls using IPTalk,

1. Connect your headset to your system.

2. Use the MaxCommunicator dialing and call accepting functions to make and receive calls.

The Calls Tab

The Calls tab displays several types of information.

Voicemail tab — Lists unopened and opened voicemail messages left at your extension. Refer to *Using Voice Mail* on page 32.

History tab — Shows a history of your incoming, outgoing, and missed calls.

Monitor tab — Shows a list of extensions that you have chosen to monitor, if any. See *Monitoring the Activity of Other Extensions* on page 35.

Line Park tab — Shows calls parked for line park groups of which you are a member. Refer to *Using Line Park* on page 36.

Call States

Each of your calls will be in one of the following states:

- **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
- **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
- **Ringing** — an outgoing call is ringing another phone or an incoming call is ringing your phone

Answering Calls

When you receive an incoming call, you will see an alert.

To answer the call, click **Yes**. The call status will show as *Connected*, and you will see a duration counter as well as a series

of icons.
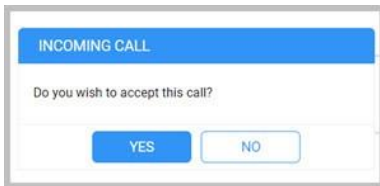
The call is shown in its own panel.

The Windows toast message notification appears when you receive an incoming call, if:

- The MaxCommunicator Web browser window is in the background

- The inbound call alert in General tab is enabled

- The Browser window'ss notification for MaxCommunicator Web is turned on

While you are on a call, you can hover your mouse over the caller's avatar (in its call panel) to see information about the caller, such as the caller's phone number. If the call is a group call, you will see the group name and DNIS.
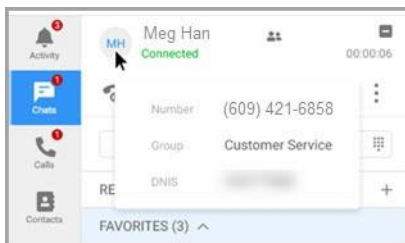
If the call is connected to another extension user, a Chat icon is displayed in the call entry for easy Chat access.
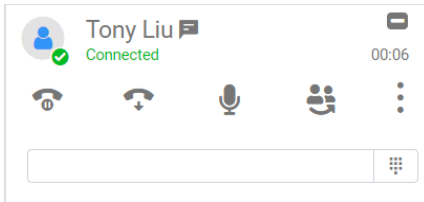
If TRUSTID is enabled for this call, a TRUSTID Status field is displayed. Mouse hovering over this field displays the TRUSID Status.
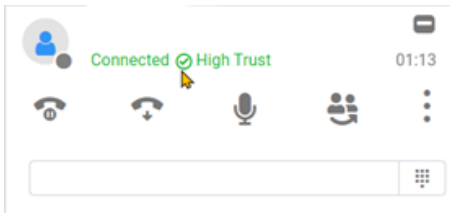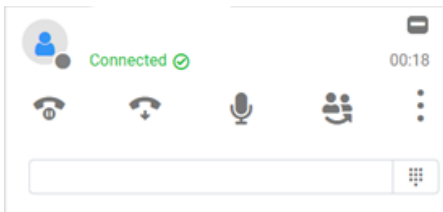
Call Icons

Various icons will appear during calls; the specific icons you see will depend upon the state of the call.

Notice that there is a *More* icon; click that icon to see additional call-handling options.

Hold   Hang up   Mute/Unmute   Transfer   More
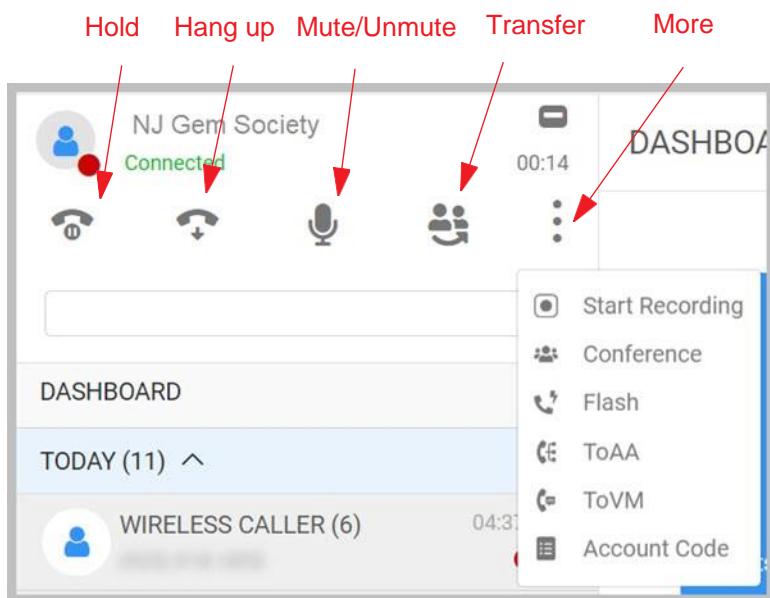
To see the function of an icon, you can hover your mouse pointer over it.

Dialing Out

There are many ways to initiate a call in MaxCommunicator. You can dial a number, select a contact and click Call, or call from a list of recent calls or voicemail messages.

Calling by Typing the Number or Extension

One way to place a call is to enter the phone number. You can click in the dialing field and type the number on your keyboard, or you can open the *Dialpad* and click each digit of the number. Click the phone icon to initiate the call.
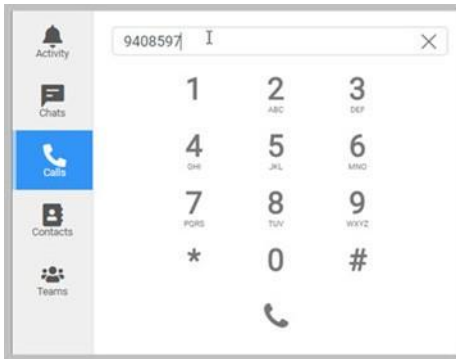
Calling by Typing the Name

If you are calling someone in your organization, you can place the call by typing part of the contact's name in the search field, and then choosing the appropriate contact from the search results.

For example, typing `bin` returns a list of contacts who have the string `bin` somewhere within their name, first name or last name.

Click the phone icon beside the entry that you want to call.

Begin typing a name here

Click a phone icon to place a Scall
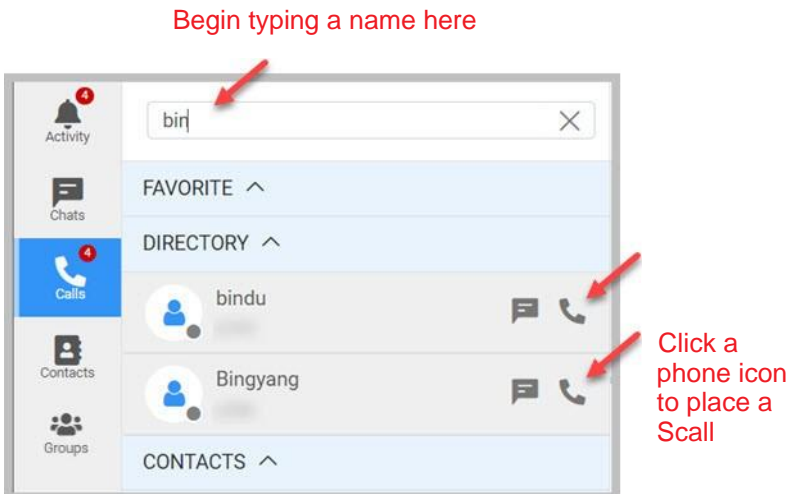
Calling by Clicking the Phone Icon for a Contact

You can call a contact by selecting the contact and clicking the *Call*

icon in the right panel.

Placing Calls on Hold

During a phone call, you can click the *Hold* button to place the call on hold.

Click this icon to place the call on hold
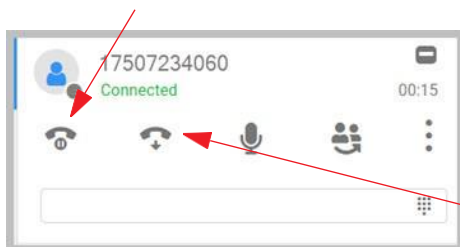
Click this icon to end the call

To resume the call, click the *Resume* button.
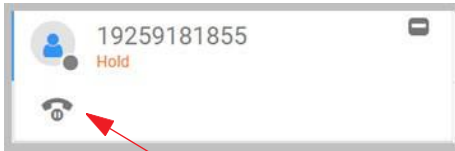
Click this icon to resume the call

Using Call Waiting

During a call, you can receive another incoming call.

To answer the new call, click **Accept** in the call alert. The original call is automatically placed on hold.

When you are ready to reconnect to the earlier call on hold, click that call entry and then click the **Resume** button.

Transferring Calls

Note: Agents using Polycom VVX model phones, refer to the MAXCS Polycom user guides for instructions. These guides can be found at: https://www.altigen.com/support/.

You can perform both supervised transfers (in which you confirm the transfer with the target) and blind transfers.

You may transfer calls in the following ways:

Dragging — Drag and drop the call (either while it's ringing or connected) onto a dialable number field on the page.

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

You will be 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.

To transfer a call to voicemail, click the **More** icon and then click

ToVM.

To transfer a call to the Auto-attendant, click the **More** icon and then click **ToAA**.

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 *Call Handling Options* on page 58.

Making Conference Calls

Note: Agents using Polycom VVX model phones, refer to the Polycom user guides for instructions. These guides can be found 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**. See the MaxCS Administration Manual for instructions on using the separate MeetMe application.

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 Settings window's **Call Handling** panel.

In the figure below, the user can click "3 members" to see a list of the conference members, and can hang up an individual conference member if needed.
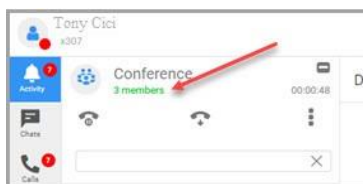
You may conference calls in the following ways:

- **Dragging** — While connected to one party, drag a Hold call to the Connected call, or drag a number from the 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 dial field enter the extension 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 prompt.

  - Highlight a Hold call panel and then click the **Conference**

    button.

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

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 Hang-up icon for a specific participant to drop them from the conference.

After canceling a conference call, you should be reconnected automatically to the initial call. If you are not automatically reconnected and want to reconnect to the first call, click the Answer icon for that call.

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

The call entry display Conference Room.
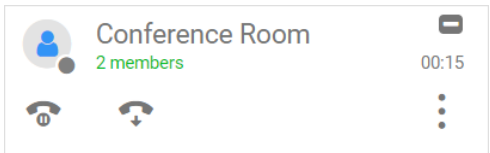
The host can mute members or change host privilege to another member.
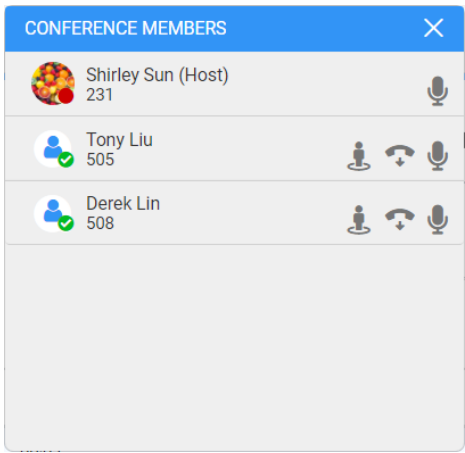
Recording Calls

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.

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

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, click the **More** icon and click **Start Recording**.
While a call is being recorded, a round red icon appears in the call
panel.

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 momentarily, click the **More** icon and click

Pause Recording.

To end the recording, click the **More** icon and click **Stop
Recording**.

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

Listening to a Call Recording

If your 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.

Entering 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 panel opens automatically, prompting you to enter an account code for the call. The panel 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 panel 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 **More** icon in the call panel and then click the **Account Code** icon.

2. 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 to the call.

Using Voice Mail

Click the **Voicemail** tab (in the Calls window) to see a list of your voice mail messages.
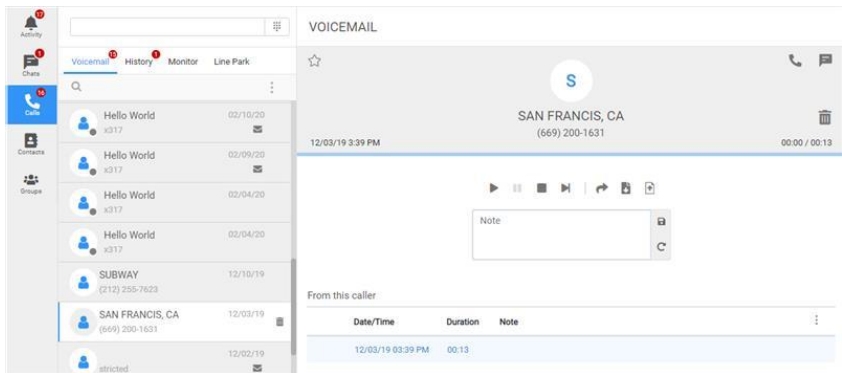
Unread voice mail messages are indicated by an envelope.

Managing Voice Mail Messages

When you select a message in the list, details for the message will appear in the right panel.

Use the command buttons to perform the following functions:

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

Saving / Exporting Messages

You can save a message as a .wav file that you can play back later. To do so, select the message in the left panel and click the **Save** icon or the **Export** icon.

• **Save** saves the message automatically on a remote server in a location designated by the where you can name the .wav file and choose a folder in which to store it. You can then play the
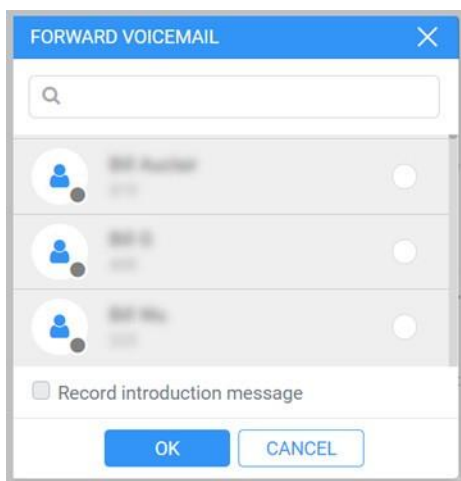
.wav file on a media player.

Adding Notes to Messages

To add a note to accompany a voice mail, click inside of the *Note*

field and type your note. Then click the **Save Note** icon to save it.

Forwarding Voicemail Messages

To forward a voicemail message,

1. Select the message and click the **Forward** button.

2. Select the contact (you can search for the contact if necessary). You can select multiple contacts.

3. If you want to record an introductory message, check that
   option.

4. Click **OK**. If you chose to record an introductory message, you will see a prompt to begin recording. After you have spoken your message, click **OK**.

# 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

Your administrator must configure a list of contacts that you are able to monitor. If you do not have permission to monitor any other extensions, you will not see contacts listed in your Monitor subtab.

1. On the Monitor tab, click the **More** icon and choose **Select Extensions**.
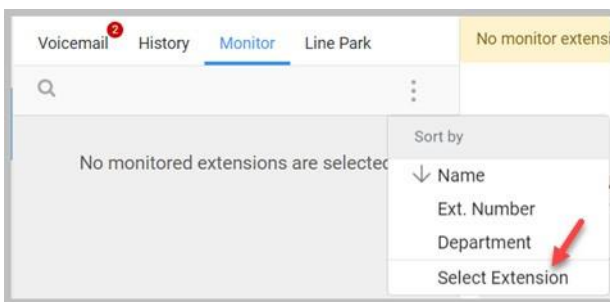
2. Select the extensions you want to monitor, and click **OK**.

The monitor window includes these fields: Time, Caller Name, Number, Duration, and DNIS. You can choose to hide or show these columns by clicking the **More** icon and checking or clearing the checkboxes.

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

Calling Extensions 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 has a call ringing, you can pick up the call by selecting that entry in the left panel and clicking the **Answer** button in the right panel.

Using Line Park

You can park calls in various line park slots for others to pick up. Slots showing a green dot are available; slots that have calls parked there show a red dot and you can see details for that call.
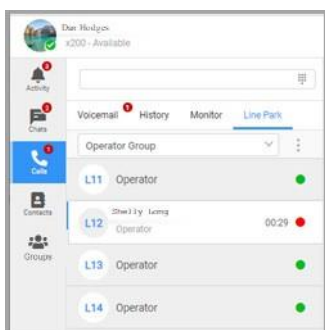
If a line park slot is filled, it shows the parked call information with a red dot status, as shown in the preceding figure.

To park the active call in an open line park slot,

1. Click the **Line Park** tab.

2. Click an empty line park slot.

3. In the right panel, click the **Call Park** button. You will hear a confirmation message confirming which slot has the call.

To pick up a parked call,

1. Go to Line Park tab

2. Select the line park call to be picked up

3. Click Pick Up button to connect to the caller

Viewing the Call History

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

The list on the left will show your calls; each block will show the other party's name, number, and the date of the call. A left-pointing arrow indicates an incoming call; a right-pointing red arrow indicates an outgoing call.

Select a call in the list to see additional details for the call in the right panel.
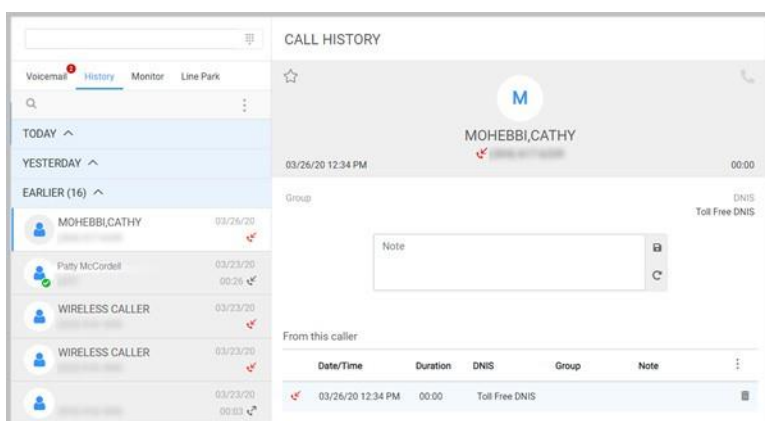
The right panel shows you the following information (you can show or hide each column):

- **Date/Time** — The date and time of the call.
- **Caller Name** — The caller name for the other party.
- **Duration** — The duration of the call.
- **DNIS** — The DNIS of the calling number.
- **Group** — The workgroup or huntgroup that you placed (or accepted) the call from.
- **Note** — Any notes that you have entered for this call.

Sorting the History List

To sort the history list, click the **More** icon and choose your sort option.
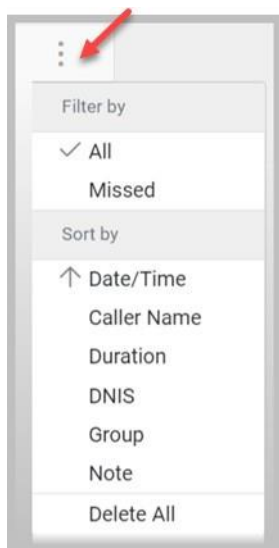
When you sort on Date/Time, the calls are sorted by last discon-
nected and not in the order the call was received. It is therefore
possible to have a record with an earlier timestamp followed by a
record with a later timestamp.

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

Managing the History List

- To view only missed calls, click the **More** icon and select
  Missed. Calls forwarded to Voicemail are also counted as
  Missed calls.

- To add a note to a call, select the call, click in the Note area,
  type your comments and click the **Save** icon.

- To delete a single call, select the call and click the **Delete** icon
  in the right panel.

- To delete all calls, click the **More** icon and select **Delete All**.

Using the Contacts Tab

To populate the **Contacts** tab with the contacts listed in your Outlook application, see *Contact Integration Options* on page 55.

You have three groups of contacts; Favorites (which you manage yourself), Directory (which is your company directory), and Contacts (which come from your Outlook application). Expand and contract these lists as necessary by clicking the up or down arrow.
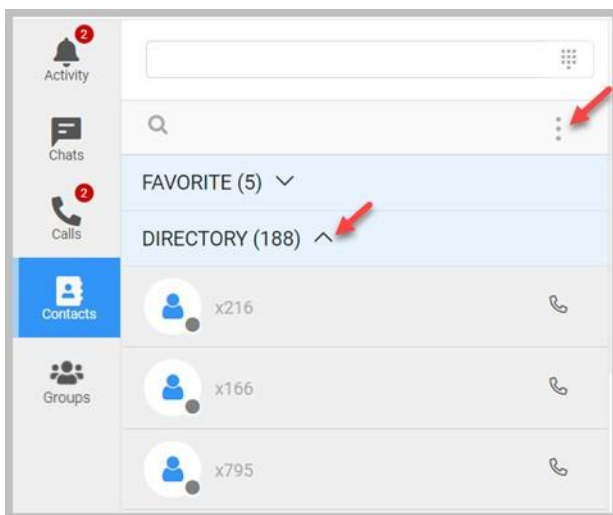
When you select a contact in the list, you will see details for that contact in the right panel.

You can search for a specific contact by using the Search field.

- To sort the contact list, click the **More** icon and choose your sort option.

- To call a contact, select the contact and click the Call icon in the right panel. If this icon is disabled then the contact is not available for a call.

- To chat with a contact, select the contact and click the Chat icon in the right panel (if that icon is enabled). The Chat panel will open for you automatically.

MaxCommunicator with Polycom Phones

You can perform many actions via your Polycom phone or via MaxCommunicator. Some notes:

• You cannot control the volume for Polycom phones from within the MaxCommunicator Web client. You must use your Polycom device to control the volume.

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.

1. Put the call on hold by clicking the **Hold** button in MaxCommunicator.

2. Make a new call by typing the number in the dialing field in MaxCommunicator.

3. When you are ready to transfer the call, make sure the original call is selected 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.

1. While on the call, enter the extension or number into the dialing field in MaxCommunicator.

2. Click the **Transfer** button. **Do not** want to put the call on hold first.

Another method is to open your Contacts list, locate the target contact, click your active call and drag it (with your mouse) to that contact. 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.

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 click the held call, drag it and drop it 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**.

Poly Headset Integration

Plantronics Hub must be installed on the desktop PC. It can be downloaded via www.poly.com/us/en/support/downloads-apps.

You can enable "Poly Headset Integration" in MaxCommunicator Web user client Settings > IPTalk page.

The following guidelines are used for Plantronics integration behaviors:

1. When an incoming ringing call is present, the Call button answers this ringing call.
2. When a call is in connected state, pressing the Call button hangs up this connected call.
   Note that the ringing call has precedence over connected call.
3. LED Status:
   a. Off – no calls outstanding
   b. On – at least one call is outstanding
   c. Blinking – at least one ringing call
4. Plays IPTalk ringtone
5. Synchronize Mute/Unmute functions between IPTalk GUI and Poly headset
6. Handset Volume Up/Down Button controls Windows system volume. IPTalk volume is a separate control.

Using Groups

You can use the Groups feature in MaxCommunicator for group collaboration.

This feature is very similar to aspects of Microsoft Teams; you can create groups, add channels to groups, and add specific members to private groups and channels as needed.

The Groups Tab

The left panel of the Groups tab shows a list of your groups and their channels.

Each time you create a new group, a public channel is created for that group automatically: *Town Square*.
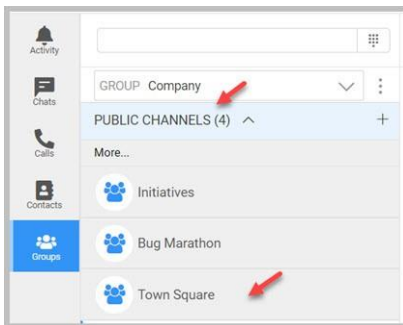
You can create additional channels for each group. Those channels can be public channels or private channels.

- **Public Channels** - All members of that group can join any public channel in that group.

- **Private Channels** - Only invited members can participate in private channels

Working with Groups

To create a new group,

1. Click the **More** icon and click **Create a New Group**.
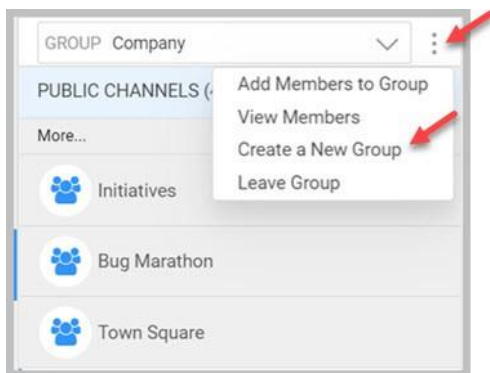
2. Enter a name for this group and click **OK**.

Notes about group names:

- Be careful when typing the name; **you cannot rename groups**.
- Include only lowercase letters, numbers, and dashes.
- Names must start with a letter and they cannot end in a dash.
- Names can be up to 15 characters in length.

The next step is to add members to this group, and to assign roles as needed.

Managing Group Members

To add members to a group, select the group from the pulldown menu, click the **More** icon, and click **Add Members to Group**.

Click those contacts that you want to add to this group. (You can use the Search box to filter the list .) If you need to remove a contact from the list, click the delete (x) icon beside the contact's name.

After you select all of the contacts, click **Add**.
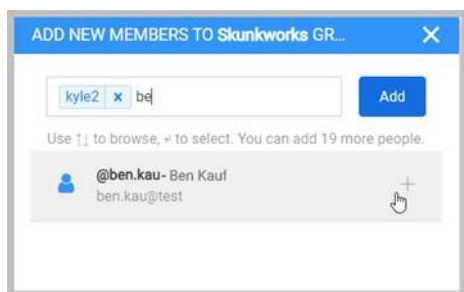
Removing Group Members

To remove a member from a group,

1. Select the group.

2. Click the **More** icon and click **Manage Members**.

3. Next to the member that you want to remove, click the down arrow and click **Remove From Group**.

The Group Admin Role

When you create a new group, you are automatically assigned as a *Group Admin* role for that group. Members with the Group Admin role have the following privileges:

• They can assign the Group Admin role to other members of that group.

• They can remove the Group Admin role from other members of that group.

• They can remove members from the group.

Managing Group Member Roles

To change a member's role for a group,

1. Select the group.

2. Click the **More** icon and click **Manage Members**.

3. For the member that you want to remove, click the down arrow and click **Make Group Admin** or **Make Member**,

whichever is appropriate.

Leaving Groups

If you no longer want to participate in a group, you can leave the group.

Note: You cannot leave a group that you created. You can leave any group that you did not create.

1. Select the group.

2. Click the **More** icon and click **Leave Group**.

Working With Channels

Channels are groups within groups.

- Groups can have multiple channels

- Channels can belong to only one group

To create a channel,

1. First, select the group the channel will belong to.

2. To create a new Public channel for this group, click the plus sign in the PUBLIC CHANNELS section.

   To create a Private channel for this group, click the plus sign in the PRIVATE CHANNELS section.
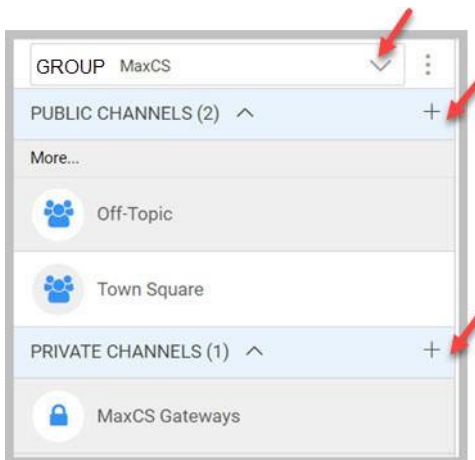
3. Enter details for this channel and then click **Create**.

- **Name** — Enter a name for the channel; members of that group will see this name. This name can be up to 64 characters in length.

- **Purpose** — Enter descriptive information for this channel, explaining the focus of information for this channel.

- **Header** — You can enter a descriptive header that will appear beside the channel name. You can insert links in this header to point members to specific web sites.

Searching for Channels to Join

To see if there are channels within a group that you may want to join, click the **More** button.
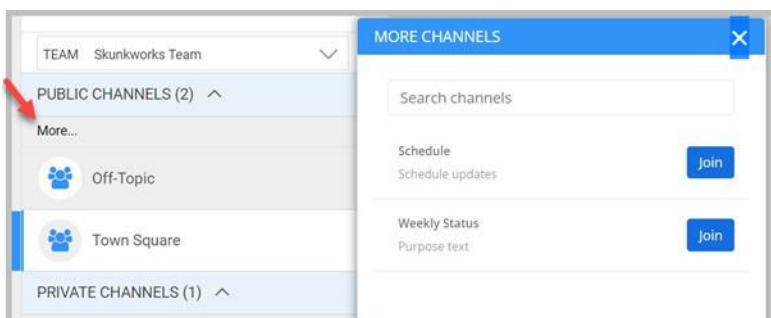
A panel shows you any public channels for that group that you have not yet joined. Click the **Join** button for any channel that you want to join.

Managing Members of Channels

To manage members of a channel,

1. Select the channel.

2. Beside the channel name in the right panel, click the down arrow.
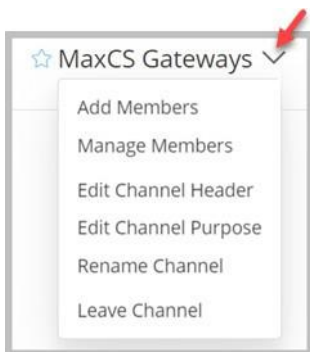
3. To add members, click **Add Members** and select the contacts to add. Click **Add**.

4. To remove a member from a channel, click the **Delete** icon beside that member's name.

Leaving Channels

If you no longer wish to participate in a channel, select the channel, pull down the menu beside the channel name in the right panel and click **Leave Channel**.
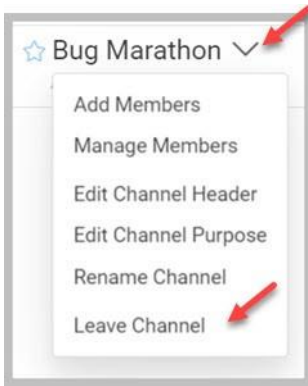
This option may not appear if you are the only member or if you created that channel.

Editing Information for Channels

To change details for a channel or rename it,

1. Select the group and then select the channel.

2. Beside the channel name in the right panel, click the down arrow.

3. To change the channel's header or purpose, which appear in various places within the Groups panel, click **Edit Channel Header** or **Edit Channel Purpose** and make your changes.

4. To give the channel a new name, click **Rename Channel** and enter a new name.

Participating in Group Discussions

Chatting with others in a channel is similar to regular chats. Select the appropriate channel and type your message or response in the

text field.
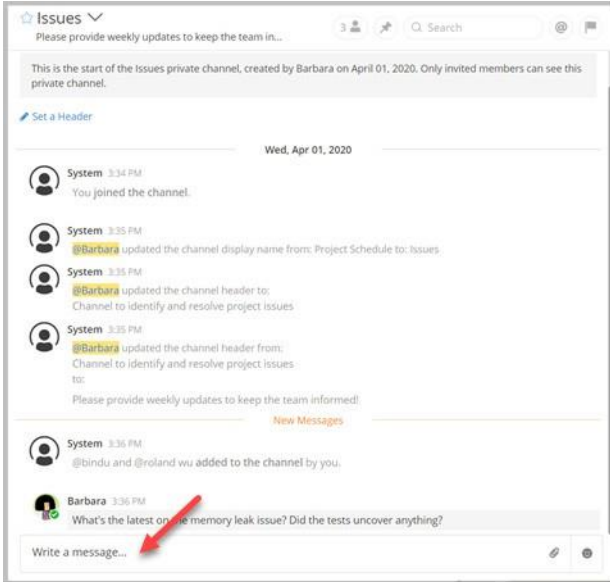
Refer to the chapter, *The Chats Panel* on page 9 for instructions on including emojis and attachments in chats.

Working with Contacts

The Contacts tab shows you details about your contacts.
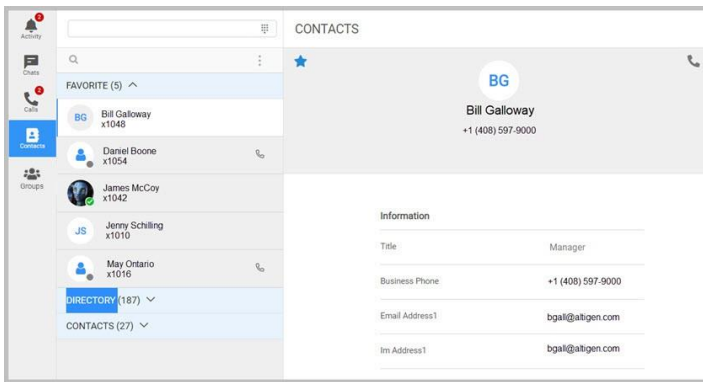
The left panel shows you three lists. You can expand and collapse each list as needed.

Favorites — These are contacts that you have marked as Favorites.

Directory — These contacts come from your company directory.

Contacts — These are contacts that you have imported from your Exchange folders.

The right panel shows details of the contact you have selected in the left panel. The type of data you see will depend upon the type of contact you have selected.

The icons in the top right corner allow you to call or text that contact, if the icons are enabled. If a contact is not available, the icons will not be enabled.

If enabled, click to chat with this contact

If enabled, click to call this contact

Importing Contacts from Exchange

Refer to the section "Contact Integration Options" on page 55 for instructions on importing contacts from your Outlook contact folders.

Searching for Contacts

To search for a specific contact, you can use the Search field. Just begin entering a name, and the results will appear as you type.

You can also sort your contact lists; click the **More** icon and pick your sort type: by name, by phone number, or by company.
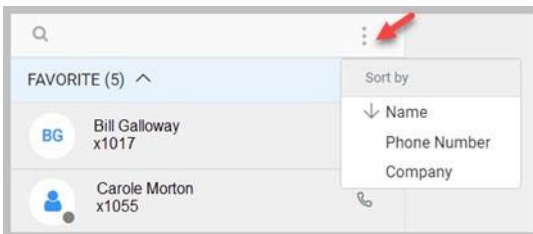
Marking Contacts as Favorites

You can mark a contact as a Favorite. This helps you find the

contact quickly, in your Favorites list. Just click the *Star* icon in that contact panel.

To remove a contact from your Favorites list, click the star again.

Contacts in MaxCommunicator Web are synchronized with Exchange contacts for addition, deletion and updates in the specified folders. Update intervals can be configured. The default value is 10 minutes.

Configuring MaxCommunicator

You can configure various MaxCommunicator options in the *Settings* window (click the **More** icon and then click **Settings**).
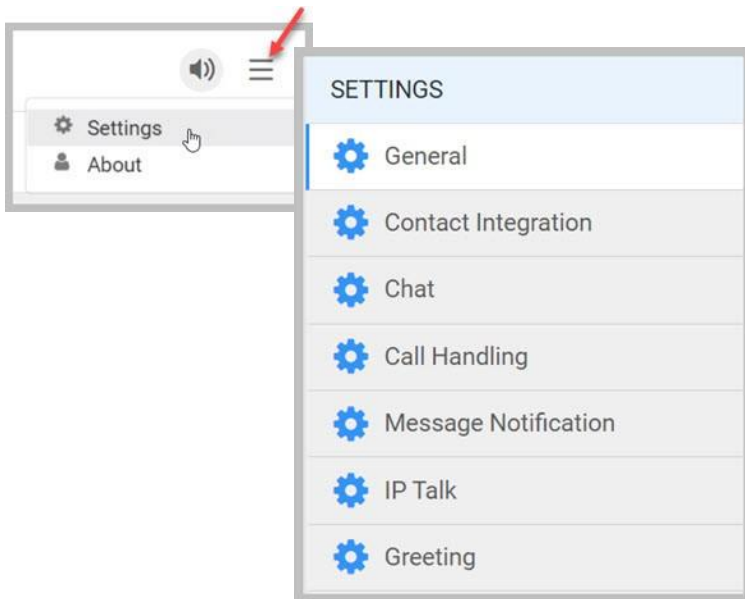
- **General** — Where you set password, default trunk access, and other general settings. See *General Options* on page 54.

- **Contact Integration** — Where you can download contacts from your Exchange Server. See "Contact Integration Options" on page 55.

- **Chat** — Where you customize various chat options. See *Call Handling Options* on page 58.

- **Call Handling** — Where you specify forwarding, busy call, and no-answer call handling, and call waiting options. See *Call Handling Options* on page 58.

- **Message Notification** — Where you indicate how and when you want to be notified about incoming voice messages. See *Voicemail Message Notification* on page 60.

- **IPTalk** — Where you enable IPTalk and specify which audio devices to use. See *IPTalk* on page 61.

- **Greeting** — Where you can record greetings for various states, such as *Busy* and *Out of Office*. See *Recording Activity Greetings* **on page 62**.

Administrators will see an additional tab, *Admin*. See page 62.

General Options

The **General** panel lets you configure the following general settings for MaxCommunicator.

You can configure these general settings:

- **Extension password** — You can change your PBX extension password here.

- **Alerts** — You can set alerts for incoming calls and/or an audio beep.

- **Voicemail** — You can choose whether to listen to your voicemail messages through your headset or play them on your sound card and speakers.

- **Default Trunk Access** — The trunk access codes are defined by the system administrator. When you make an outbound call, then 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.

- **Display Server Time** — 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.

- **Debugging** — Use these options as directed by your Altigen representative while debugging issues with your service.

Contact Integration Options

MaxCommunicator can obtain your contact and calendar information from Exchange Server, so that you can easily work with your contacts in MaxCommunicator.

To download contacts from one or more of these Exchange Server folders,

1. Open the Settings *Contact Integration* panel and check the option **Enable Exchange Contact Integration**.

2. Select either **Use My Service Hub Address** (if that email address is your MaxCommunicator address) or **Use Email Account With Authentication**.

   If you choose or **Use Email Account With Authentication**, then enter your user name and password.

   After a few moments to fetch the data, MaxCommunicator displays your contact folders from the Exchange Server. The top two folders in the list are Contacts (which is the default contact folder for Outlook users) and Global Address List contacts, normally for company contacts. Other folders in your account are also listed.

CONTACT INTEGRATION

☑ Enable Exchange Contact Integration

Exchange Login Credential

● Use My Service Hub Email Address

○ Use Email Account with Authentication

Public Folders

Contact Folders

☑ Contacts (859)

☐ Global Address List Contacts (0)

Other Contact Folders

☐ {A9E2BC46-B3A0-4243-B315-60D991004455} (3)

☐ Companies (0)

☐ Organizational Contacts (0)

☐ PeopleCentricConversation Buddies (0)

☐ Recipient Cache (3431)

Download Contacts   **OK**   Cancel

3. Select the folders from which you want to download contacts and then click **OK**.
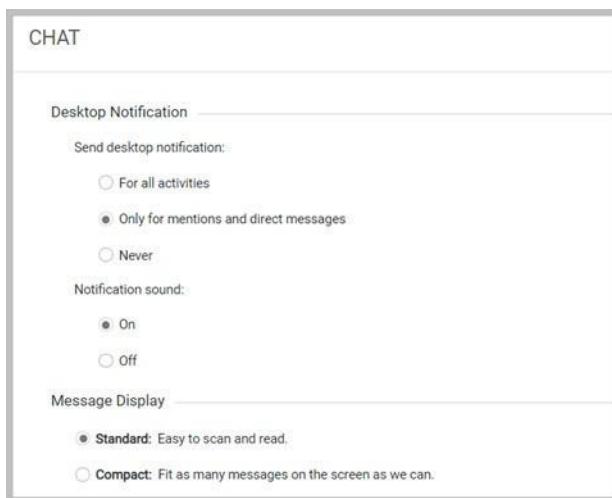
4. Click the **Download Contacts** button. MaxCommunicator saves the downloaded contact records in the application database, for further use.

The downloading process may take from a few seconds to a few minutes, depending on the number of contacts and your download speed.

In case you add any new contacts or change contact details in your Exchange folders, MaxCommunicator will update your contacts lists every 10 minutes.

Chat Options

The Chat panel lets you configure options for chat sessions.

- **Send Desktop Notification** — Choose which level of notification you prefer.

- **Notification Sound** — Choose whether notifications include audio alerts

- **Message Display** — Choose whether to display as many messages as possible, or display fewer messages to improve legibility.

Call Handling Options

The Call Handling panel provides options for how to treat incoming calls.

- **Enable Call Forwarding** — Forwards calls to the target that you specify.

  - Voicemail — Forwards incoming calls to your Voicemail mailbox.

  - Auto Attendant — Forwards incoming calls to the Auto Attendant that you select from the list.

  - Extension — Forwards incoming calls to the extension that you specify. Choose from the list or type the extension.

  - Outside Number — Forwards incoming calls to an outside number that you enter. 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.

- Operator — Forwards incoming calls to the Operator

- Line Park — Forwards incoming calls to the Line Park location that you specify.

- VM Access — Forwards incoming calls to the voicemail mailbox that you select? TBD

- **Enable Busy Call Handling** — Specifies how to handle incoming calls when you're already on the phone or when you can't answer the phone (including those times when you have set your status to Do Not Disturb).

  See page 58 for descriptions of the options.

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

- **Call Waiting** — Specifies your call-waiting preference.

  Call waiting options are available only if the *Enable Busy Call Handling* option has been enabled. 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 — Allows a caller to hear a ringback tone when the called party is in voice mail, paging, transfer, or conference state.

  Enable No-Answer Handing — Specifies how to manage incoming calls that you do not answer. See page 58 for descriptions of the options.

- **Number of Rings Before Forwarding** — This setting pertains to almost all the other options in this panel. It is the number of times the phone rings before the system forwards the call.

Voicemail Message Notification

In the *Message Notifications* panel, you can specify how and when you'd like to be alerted to new voicemail messages.

You can set these notification options:

- **Message Notification —** Select 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.

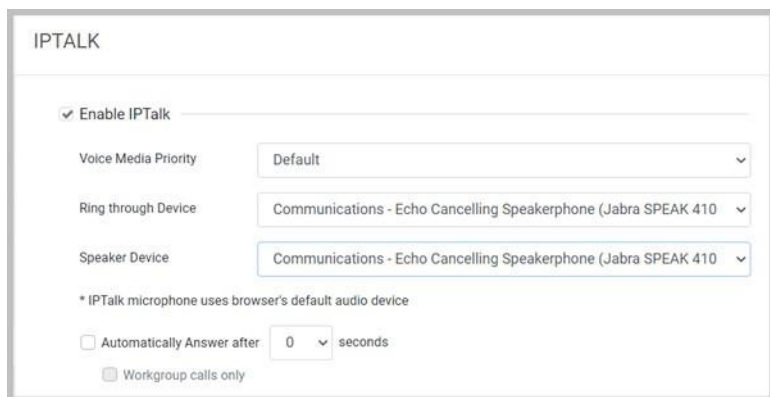- **Notifications Reminder** — Specify how and when you want to be notified.

To be notified via a call to an outside number, choose **By Calling Phone**, use the drop-down list to select the trunk access code, and then type in the phone number.

To be notified by calling an extension, choose **By Calling Extension** and then type in the extension number.

Note that you can also configure Message Notification through the Altigen VoiceMail System.

IPTalk

If you're using IPTalk, set the options in the **IPTalk** configuration panel.

- **Enable IPTalk** — Check this option to enable IPTalk.
- **Voice Media Priority** — Set the priority for voice media.
- **Ring through Device** — Choose which device that will carry the incoming ring when a call comes in.
- **Microphone Device** — Choose which device you want to use as your microphone, to transmit your voice.
- **Speaker Device** — Choose which device you want to use as a speaker, to play a caller's voice.
- **Automatically Answer** — To have MaxCommunicator automatically pick up calls, check this option and use the arrow keys to choose the number of seconds.

The default setting is 0 seconds. If you leave the duration set to 0, all incoming calls will connect right away. Neither you nor your caller will hear a ring tone.

A secondary option allows you to specify whether to auto- answer only workgroup calls, not personal calls.

Recording Activity Greetings

You can record a different greeting for each type of Presence. You will speak into your specified microphone device to create your greeting.

1. On the Settings **Greeting** tab, select which Presence you want to record a greeting for.

2. If you want to listen to your current greeting for that Presence, click the **Play** icon.

3. To record a new greeting, click the **Record** button for that Presence. After recording your greeting, click **Stop**.
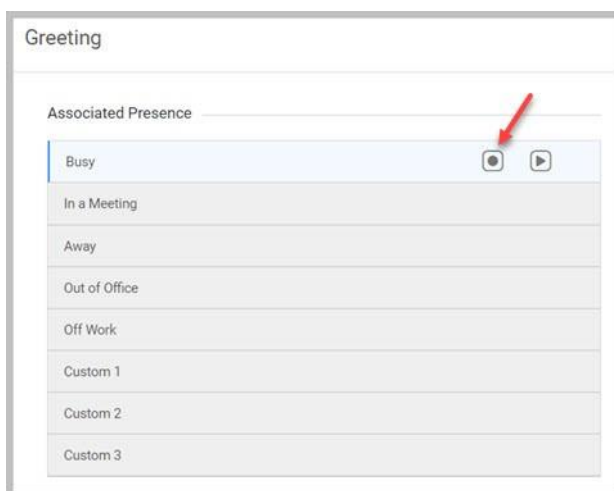
Admin Pages

Admin pages can be accessed by clicking the MaxCommunicator icon under Admin Applications in Service Hub home page. Two admin pages, General and Contact Integration, are supported.

General Page

Server-wide settings can be configured in General page.

User-based Contact Integration Settings

Admins can enable or disable the Contact Integration feature for each individual MaxCommunicator user by configuring the *Contact Integration Setting* parameter. Alternatively, the admin can allow the user to configure this setting. Possible values for this field are *Enable*, *Disable* and *User Define*. If *User Define* is selected the user has the option to either enable or disable this setting.

Contact Update Interval specifies the duration to update the contact list if any contact data changes to the selected contact folders.

If *Contact Integration Setting* is *Enable*, the admin can further define the public folders to be selected for this user on behalf of individual user.
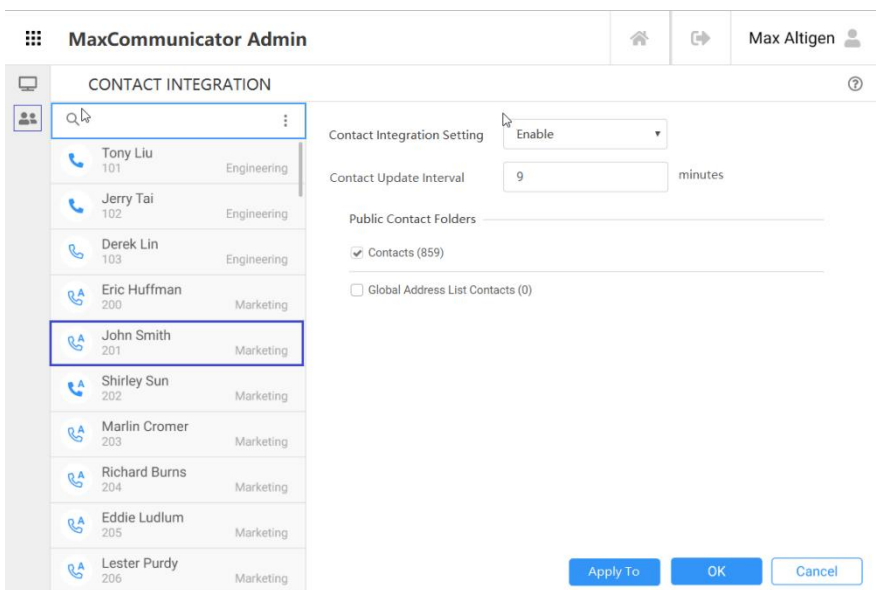
The admin can click "Apply To" button to apply the same settings to multiple or all the users.

When this MaxCommunicator client user logs in:

- If *Contact Integration Setting* is set to *Enable or Disable,* the *Enable Exchange Contact Integration* setting in the client is set to the same value and greyed out.

- If *Contact Integration Setting* is set to the *User Define,* the *Enable Exchange Contact Integration* setting in the client is active and can be changed by the client.

- For those public folders selected by the admin, the selection of the matching public folder in the MaxCommunicator Web user client Settings > Contact Integration page is greyed out. The selection for the other folders is active and can be changed by the client.

Working with Mobile Devices

The following mobile devices are supported:

- Android Chrome browser

- iOS Safari browser devices are supported.
- IPTalk functions are limited due to it is not a native application.
  - IPTalk may not work when the browser is not in the foreground.
  - Cannot control audio path to use speaker or handset. Sometimes both speaker and handset have audio paths.
- Some screen layouts might be different.
- Support portrait mode (the GUI layout in landscape mode is not tuned)
- Notification toast messages for Chat and inbound call alerts (available in Windows desktop) are not supported in mobile devices.

Settings No Longer Supported

The following settings from the MaxCommunicator Windows client are not supported in MaxCommunicator Web:

- Enable Auto Dial
- Enable SmartTag
- Select-N-Dial parameters
- Alert: screen pop and Salesforce screen pop, and auto close
- Pager and Custom App selections in Message Notification
- UC Integration
- Customization: Tab Layout and Themes
- IPTalk TOS (DSCP is supported)
- Log
- CRM Integration

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