

# MaxACD Release 7.1 Salesforce Connector Integration Guide

January 17, 2019



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This guide is provided for administrators who are configuring AltiGen Communication's MaxACD 7.1 to work with Salesforce.com. The instructions cover:

- How administrators configure the Salesforce Connector, beginning on page 4
- How agents enable the Salesforce pop-up in MaxAgent, on page 18

Note that the MaxGroups feature of MaxACD Release 7.1 does not support the Salesforce Connector.

## Introduction

Salesforce provides an OpenCTI toolkit to integrate its accounts with telephony systems. A softphone is created in a web browser for agents to handle calls.

When calls come in, the Salesforce Connector retrieves the IVR data and looks for a ID match in the customer database based upon the Caller ID, Contact, Account, or Lead information.

Salesforce OpenCTI is server-side technology; there is no software to install on the client systems.



Figure 1: Overview or Salesforce integration

## Requirements

In order to integrate Salesforce with MaxACD, your environment must meet the following requirements:

- The MaxACD server must be running Windows Server 2012 or later
- The MaxACD server must be running IIS version 8.0 or later
- The MaxACD server must be running .Net Framework version 4.5 or later
- The MaxACD server must be running MaxACD Release 7.1 or later
- The MaxACD server must be accessible to the client applications
- Because only HTTPS is supported, you must have a public web server certificate



- You must have your own Salesforce environment that supports OpenCTI.
- You must have a Salesforce subscription that includes either the Sales Console or the Service Console. Refer to the Salesforce.com web site for details on products, licenses, and prices: <a href="https://www.salesforce.com/editions-pricing/overview/">https://www.salesforce.com/editions-pricing/overview/</a>
- Agents who will be using Salesforce must have a MaxACD Salesforce Integration Seat license applied to their accounts
- Agents who will be using Salesforce must have the MaxAgent client application

#### **Step 1: Install the MaxACD Salesforce Connector**

To install Salesforce integration on the MaxACD server,

- 1. Log on to the MaxACD server.
- 2. In the MaxACD installation media, open the *SalesforceIntegration* folder.
- 3. Run the *setup.exe* program in that folder.

During the installation, we recommend that you accept the default file location; the two primary components (the softphone and the web proxy) must be in same website with the sub URL. The default file location ensures this arrangement.

4. Follow the instructions in the installation wizard.

To deploy Salesforce Connector on a separate server from the MaxACD server, see the information in the section <u>Deploy a Standalone Salesforce Integration Server</u> on page 19.

## **Step 2: Configure IIS**

Salesforce integration requires a softphone page to be hosted on a valid HTTPS server. Therefore, a public certificate is required in IIS.

If you do not already have a valid public certificate, you may find this article helpful:

http://www.vkernel.ro/blog/request-and-install-ssl-certificates-in-microsoft-iis-78

Considerations:

- The HTTPS server should be your MaxACD server. They should be located on the same system.
- You can purchase a public SSL Web Server certificate from certificate authority vendors such as Verisign, Go Daddy, and so on.
- The SSL Web Server certificate needs to match your web server's URI. If you already have a wildcard SSL Web Server certificate that matches the web server's URI, it can be used.
- Make sure that you provide the correct web server URI to the vendor when you purchase the SSL Web Server certificate. If the URI is mismatched, it will not be useable.



In the example used throughout this section, the web server URI that is used is *https://skyace.engsfb2015.com*.

1. Open IIS Manager on the MaxACD server. Double-click **Server Certificates**.

ej.	Internet Information Services (IIS) Manager	_ <b>_</b> X
€ SKYACEA →		🖸 🖄 🖗 •
File View Help		
Connections		Actions
🔍 - 🗟 🖄 😣	SKYACEA Home	Open Feature
Start Page	Filter: • Go - 🕁 Show All 📔	Manage Server
Application Pools	🗃 📑 🦛 🦓 🗅	<ul> <li>Restart</li> <li>Start</li> </ul>
A G Default Web Site	Request Server WebDAV Worker	Stop
þ 😥 altireach	Filtering Certificates Authori Processes	View Application Pools

Figure 2: Double-click Server Certificates in IIS

2. Click **Import** on the list to the right.

9	Internet Information Services (IIS) Manager					
SKYACEA +			9 = A @ •			
File View Help						
Connections	Comuna Contificant		Actions			
Q- 🗟 🖄 😣	Server Certificat	Server Certificates				
Start Page SKYACEA (ENGSFB2015\admi	Use this feature to request and ma server can use with websites confi	Create Certificate Request Complete Certificate Request				
A Sites	Filter: • 🐨	Go 🕞 🙀 Show All 📔 💂	Create Domain Certificate			
4 😌 Default Web Site	Name	Issued To	Create Self-Signed Certificate			
b - 20 altireach b - 20 aspnet_client	skyacea cert Skype for Business Server 2015	skyacea.engsfb2015.com SkyAcePool.engsfb2015.com	Enable Automatic Rebind of Renewed Certificate			
⊳ 🔮 CWS 4 🐖 Softphone	WMSVC	WMSvc-SKYACEA	Help			

Figure 3: Import the certificate

- 3. Browse to select the public certificate. Click Next.
- 4. Continue through the remaining panels of the installation wizard.
- 5. After you finish the installation process, in IIS, right-click your web site from the *Sites* list in the panel on the left and choose **Edit Bindings**.



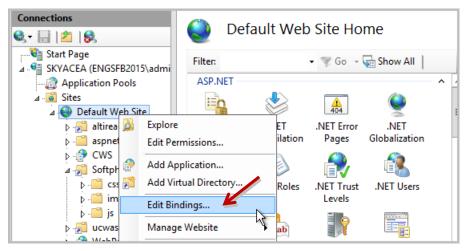


Figure 4: Edit bindings for the web site

- 6. In the Site Bindings panel, click Add.
- 7. In the Add Site Binding panel, select the following parameters and then click OK.
  - For the *Type* field, select **https**.
  - For the *Port* field, enter **443**.
  - For the SSL certificate field, select the certificate that you just imported.
  - Leave the other fields as they are. Save your settings.

Site Bindings	? X
Add Site Binding ? X	Add
Type: IP address: Port: https V All Unassigned V 443	Edit
Host name:	Remove
	Browse
Require Server Name Indication	
SSL certificate:	
Not selected View	
Not selected	
skyacea cert Skype for Business Server 2015 Default certificate 12/200 OK Cancel WMSVC	
	Close

Figure 5: Select the certificate that you imported

- 8. Close IIS Manager.
- To verify the IIS configuration, open a browser and navigate to https://<fqdn>/softphone/softphone.html, substituting the web site's FQDN for the placeholder <fqdn>. This URL is the CTI Adapter URL. This URL will be used in one of configuration steps later.



In our examples in figures in this configuration guide, the CTI Adapter URL used is *https://skyacea.engsfb2015.com/softphone.html*.

10. Make sure that you see a panel similar to the following image, which indicates that the browser is treating the certificate as a valid certificate.

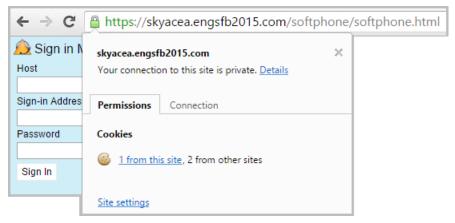


Figure 6:Make sure that the certificate is accepted as valid

#### Step 3: Import a MaxACD Call Center into Salesforce

This section describes how to import a Call Center XML definition for MaxACD.

1. Log into Salesforce.com with administrator privileges. Click **Setup** near the top of the page.

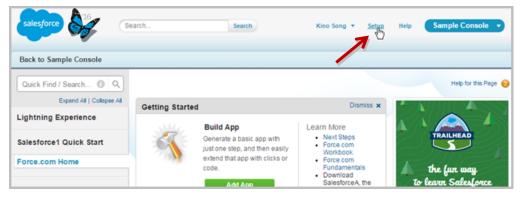


Figure 7: Log in and click Setup

2. In the "Quick Find/Search" field on the left, enter the word call. Then click Call Centers on the left.



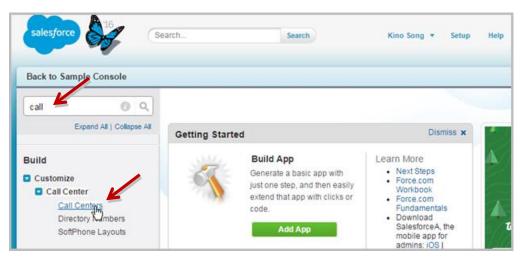


Figure 8: Search for Call and then click Call Centers.

3. Click Continue.

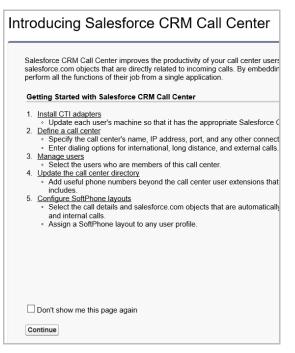


Figure 9: Click Continue



4. On the All Call Centers page, click the Import button, which is located just above the list.

Quick Find / Search () Q	10.10	II Centers			Help for this Page 🥑
Lightning Experience		er corresponds to a single computer-telep com users must be assigned to a call ce			
Salesforce1 Quick Start			Import		
Salestore i Quick Start	Action	Name +	Version	Created Date	Last Modified Date
Force.com Home	Edit   Del	AltiGen MaxACD Connector	4,000	1/28/2016 7:51 PM	1/28/2016 7:51 PM
Force.com Home	Edit   Del	Demo Call Center Adapter Open CTI		12/22/2015 9:41 PM	12/22/2015 9:41 PM
Administer	Edit   Del	MaxACD Call Center		2/24/2016 1:15 AM	4/11/2016 8:28 PM
	Edit   Del	MaxACD Call Center		4/1/2016 8:37 PM	4/1/2016 8:37 PM
Manage Users     Manage Apps	Edit   Del	My Demo Call Center Adapter		12/23/2015 6:59 PM	1/12/2016 11:09 PM

Figure 10: Click Import

5. Click **Choose File**. Navigate to this XML file and then click **Open**:

C:\Program Files (x86)\AltiGen\SalesforceIntegration\Deployment\MaxACDCallCenter.xml

Quick Find / Search O Q Expand All   Collapse All	Call Center Import
Lightning Experience	To create your first call center record for a CTI adapter that was just instal center definition file into salesforce.com. The call center definition file is lc and is typically named after the type of CTI system that the adapter supple "CinedDOCE the interview" Advancement of the system of t
Salesforce1 Quick Start	"CiscolPCCEnterprise7x.xml"). <u>View sample definition file</u>
Force.com Home	New Call Center Import Information
Administer	Call Center Definition File Choose File waxACDCallCenter.xml
Manage Users     Manage Apps     Manage Territories	Import_Cancel

Figure 11: Choose the file "MaxACDCallCenter.xml"

6. Click **Import**. Now that you have imported the call center, you will configure it. In the list, you should see an entry "MaxACD Call Center." Click the **Edit** link on that row. This opens a new panel.

Quick Find / Search O Q Expand All   Collapse All		II Centers			Help for this Page
Lightning Experience		er corresponds to a single computer-tele com users must be assigned to a call o			
Salesforce1 Quick Start			Import		
Salestorer Galex Start	Action	Name +	Version	Created Date	Last Modified Date
	Edit   Del	sector manufic Largenties	4.000	1/28/2016 7:51 PM	1/28/2016 7:51 PM
Force.com Home	Edit   Del	farm (at lients south lient 17)		12/22/2015 9:41 PM	12/22/2015 9:41 PM

Figure 12: Click Edit beside the entry "MaxACD Call Center"



7. On the *Call Center Edit* panel, edit the *CTI Adapter URL* field by replacing the placeholder "*localhost*" with the Salesforce Integration server FQDN. Click **Save**.

Quick Find / Search 🕜 Q Expand All   Collapse All	Call Center Edit MaxACD Call Center All Call Centers » MaxACD Call Center				
	Call Center Edit	Save			
Salesforce1 Quick Start	General Information	on			
Force.com Home	InternalName Display Name	MaxACDCallCenter MaxACD Call Center			
Administer  Manage Users Manage Apps	CTI Adapter URL Use CTI API Softphone Height	https://localhost/softphone/sc true			

Figure 13: Edit the URL by entering the MaxACD server FQDN

# Step 4: Add Users to the MaxACD Call Center

Next, you will add the users who will use the Salesforce Connector.

1. Click Manage Call Center Users.

Call Center Detai	Edit Delete Clone
General Information	
InternalName	MaxACDCallCenter
Display Name	MaxACD Call Center
CTI Adapter URL	Hige: Healtine compublic tectphone tectphone. Here
Use CTI API	true
Softphone Height	200
Softphone Width	200
Dialing Options	
Outside Prefix	9
Long Distance Prefix	1
International Prefix	01
Call Center User	S Manage Call Center Users
Call Center Users	by Profile
System Administrator	1
Total	1

Figure 14: Click the "Manage Call Center Users" button



- 2. On the Manage Users page, click Add More Users.
- 3. To search for a user in your Active Directory, enter your search criteria and click Find.
- 4. In the search results, select the desired users and click Add to Call Center.
- 5. Repeat steps 3 and 4 until all appropriate users have been added.

## **Step 5: Import Apex**

Apex is a programming language that allows developers to add business logic to most system events. Apex is used with the MaxACD Salesforce Connector.

1. In the "Quick Find/Search" field on the left, enter the word **apex**.

apex	A call cente	II Centers er corresponds to a single computer-telep com users must be assigned to a call co		
Email Administration			Import	
Apex Exception Email	Action	Name +	Version	Created D
Apex Exception Email	Edit   Del	All Cent Max ACE: Contractor	4.000	1/28/2016
	Edit   Del	Dems Call Center Adapter Open CTI		12/22/201
Build	Edit   Del	Mai ACD Call Center		2/24/2016
Develop	Edit   Del	MaxACD Call Center		4/1/2016 8
Apex Classes	Edit   Del	My Demo Call Center Adapter		12/23/201

Figure 15: Click the "Apex Classes" link

- 2. In the list on the left, click Apex Classes.
- 3. In the Apex Classes page, click New.

Quick Find / Search () Q Expand All   Collapse All	Apex Classes
Lightning Experience	Force.com Apex Code is an object oriented programming language that allows developers to develop on-demand busine platform.
Salesforce1 Quick Start	Percent of Apex Used: 0.3% You are currently using 8,896 characters of Apex Code (excluding comments and @isTest annotated classes) in your limit of 3,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your or
Force.com Home	Estimate your organization's code coverage 1
Administer  Manage Users Manage Apps	Compile all classes i View: All  Create New View A B D E F G H I J K L M N O P Q R
Manage Territories	Developer Console Netly Generate from WSDL Run All Tests Schedule Apex
Company Profile     Security Controls	Action Name * Namespace Prefix Api Version Status Size Without Comment

Figure 16: Click the New button

4. Open the following file on the server and copy its contents:

C:\Program Files (x86)\AltiGen\SalesforceIntegration\Deployment \SoftphoneSearchController.cls



5. Paste the copied text into the *Apex Classes* page. Click **Save**.

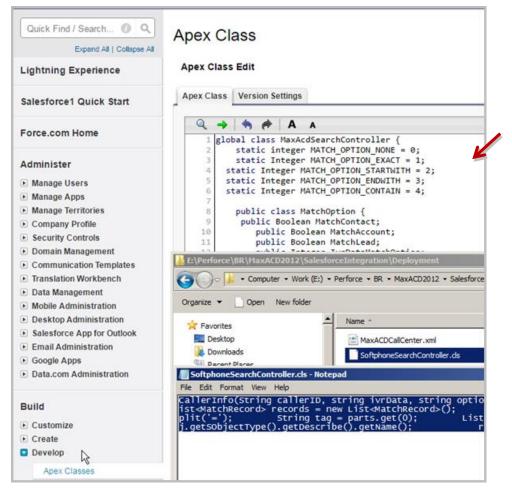


Figure 17: Copy the contents of the file SoftphoneSearchController.cls into the Apex Class Edit window

## **Step 6: Test the Configuration**

Now you can test this configuration. Log into Salesforce under a user account that you added. Switch to the *Contacts* tab, the login fields for the softphone should appear on the left.



salesf	orce	16 57	Search			Search		
Home	Chatter	Accounts	Contacts	Cases	Solutions	Reports	Dashboards	+
Host	<b>jn in Max</b> Address rd	ACD	View:	Contacts Home New Last		▼ Go	Edit   Create	• New '
Sign In	1		Name	.Sitta				,

Figure 18: Log into Salesforce, confirm that the softphone appears

#### **Step 7: Assign Salesforce Integration Licenses to Agents**

You can now assign Salesforce Integration seat licenses to users in MaxACD Administrator.

1. Log into CWS (the MaxACD Administrator portal). To confirm that you have Salesforce Integration Seat licenses in your account, click License.

ALTIGEN	Admin System	User IVR	Work	group	Work Hours	Lice
License						
License Configuration						
System Key: SS0V00B10D-710	B39DA3A					
License	Used	Total		Seat Li	icense Memi	bers
License Recording Seat	Used 2	Total 500		Seat Li Chris F		bers
						bers
Recording Seat	2	500				bers
Recording Seat MaxAgent Seat	2 6	500 401				bers
Recording Seat MaxAgent Seat MaxSupervisor Seat	2 6 2	500 401 20				bers

Figure 19: In the MaxACD Administrator portal, click License

2. The License page shows an overview of the licenses used and total licenses. You should see the Salesforce Integration Seat license on that list.

If you do not see that license, or if all of those licenses show as *Used*, then you must acquire more seat licenses; contact your AltiGen sales representative to obtain the appropriate licenses.

- 3. After you determine that you have sufficient Salesforce Integration Seat licenses, assign them to the appropriate users. Follow these steps for each user:
  - a. Select User > General.



- b. Select the user name on the left.
- c. On the right, in the *License Assignment* section, check the option **Assign Salesforce Integration License**. Click **Ok**.
- 4. When you have finished assigning the Salesforce licenses to all appropriate users, return to Salesforce.com. Log in as one of those users to confirm the configuration:
  - For the Host field, enter the Salesforce Integration server address (either the IP address or FQDN).
  - For the *Sign-in Address* field, enter the username.
  - For the *Password* field, enter the user password. Click **Sign In**.

	salesf	orce	16	Sea	arch			Search			
ſ	Home	Chatter	Accounts	Со	ntacts	Cases	Solutions	Reports	Dashboards		
	Host skyace Sign-in	gn in Max ea.engsfb20 Address Qengsfb201	)15.com			Accounts Home New This	s Week		▼ Go! Edit I		
L	Passwo	ord	15.0011	J		nt Acco	unts				
	Sign Ir	1			Kino S						

Figure 20: Log into the user account for the softphone

5. You will see an idle telephone icon after you log in.

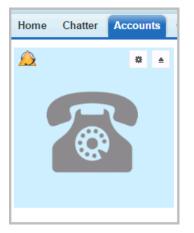


Figure 21: Image of the softphone in the left panel

Agents can configure their accounts to permit Salesforce pop up messages. These instructions are covered in the section <u>Enabling the Salesforce Screen Pop in MaxAgent</u> on page 18.

**Limitation:** The salesforce application will reload each time the user moves between the various Salesforce tabs. For example, if a user switches from the Accounts tab to the Contacts tab, the application will reload in response



to that switch. If an inbound call arrives during the process of reloading the application, a screen pop may not occur. See Step 9 for instructions on how to configure the salesforce console.

# **Step 8: Configure IVR Data Match Entries**

When a call comes in, the Salesforce Connector identifies the caller ID and any IVR data for the call. It then calls the Salesforce.com API to try to match a record in the customer database.

- Caller ID is from CO (Central Office)
- IVR data can be configured in IVR page in CWS (MaxACD Configuration Portal).

You will need to set up IVR entries that will collect digits based upon a value tag and the length of the digits.

The format for the Text Tag is *tab.field* (for example, Case.Casenumber is the tab *Case* and the field *Casenumber*).

#### **Configuration Example: Case Numbers**

Salesforce.com has a page for cases. Each case has an 8-digit case number prefixed with zeros. The field name of a case number is *Case.CaseNumber*. (The general format is *tab.field*; in this instance, *Case* is the tab and *CaseNumber* is the field.)

In this case, you would configure an IVR entry with the text tag set to *Case.CaseNumber*, and digit length set at 4 – 8 (the maximum digital length in MaxACD is 16).

If a caller enters 1234 at this IVR menu, the Salesforce Connector will receive IVR data "Case.CaseNumber=1234".

The next figure illustrates how you would configure this IVR entry.

-0 Level - Expand Tree (System)	IVR
_0 No Action	
-1 Adv - Collect Digits (Collect Case Number)	Name System
L.& Call - To Group PM	Media Type Voice   Add Media
_2 No Action (2)	
3 No Action	
4 No Action	Configuration
	comgatation
6 No Action	Item 01
7 No Action	
_8 No Action	Item Name Collect Case Number
_9 No Action	Prompt phrase0291
T Call - To Group RD wg & No Action	
* Level - Repeat Current Level	Set Session Priority 5 T
	Set Skill Level Requirement 5
	Actions Adv - Collect Digits
	Text Tag Case.CaseNumber
	Minimum Length
	Maximum Length 8
	PSTN Call Inter-Digit Timeout 7
	Inter-Digit Timeout After Max Length 0
	IVR will go to the next level after collecting enough digits.

Figure 22: IVR entry for matching case number



You would set the parameters for the IVR entry as follows:

- Set Actions to Adv. Collect Digits
- Set Text Tag to Case.CaseNumber (the format it tab.field)
- Set Minimum Length to 4
- Set Maximum Length to 8

You can match any Salesforce field with the Tag value, for example, you can use Contract.ContractNumber, Solution.SolutionNumber, and so on.

For descriptions of each field, refer to the Salesforce Field Reference Guide on this page:

https://developer.salesforce.com/docs/atlas.en-us.sfFieldRef.meta/sfFieldRef/salesforce\_field\_reference.htm

#### **Step 9: Configure the Salesforce Console**

In the default Salesforce web pages, some pages will not show the softphone. In addition, the application may need to reload when the user switches between tabs. Because of these issues, AltiGen strongly recommends that your agents use the *Salesforce console*.

In the Salesforce console, all detailed pages can display in tabs and the softphone appears in the bottom right corner.

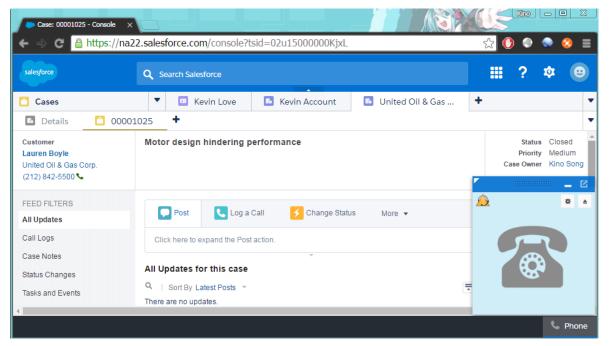


Figure 23: Example of the Salesforce Console

To learn how to set up the Salesforce Console, watch the video on this page: http://salesforce.vidyard.com/watch/Ki1BhOiiQAbhWmFg-x4uiQ



# **Step 10: For Redundant Deployments**

Please note the following changes if you have configured redundancy in MaxACD:

- Install the Salesforce Connector on both MaxACD servers.
- In the Salesforce Call Center definition, configure the CTI Adapter URL field to be the primary server address.
- When a switchover occurs, go into Salesforce and change the *CTI Adapter URL* field to the secondary server address. After this is done, have all Salesforce agents refresh their Salesforce pages.

#### **Step 11: Agent Instructions**

Once you have finished the configuration, you will need to provide your agents with the following information:

- Login URL to log into Salesforce
- Their username and password

Users will see an idle telephone icon after they log in.





To sign out of Salesforce, users click the button above the softphone.

Users can choose what criteria to use when matching Caller ID data to existing customers, by checking or clearing checkboxes in the *Settings* section.



Setting	s
Caller II	D matches with:
Con	itact
Acce	ount
🔲 Lea	d
IVR Dat Start W	ta Match Options: ∕ith ▼

Figure 25: Set criteria to use when matching Caller ID data

#### Enabling the Salesforce Screen Pop in MaxAgent

Users must configure MaxAgent to allow Salesforce to pop up messages for inbound calls. To enable this, users perform the following steps.

- 1. In MaxAgent, click the **Configuration** button.
- 2. Choose Alerts.
- 3. Set the *Alert Type* option to **Salesforce Screen Pop**.



Figure 26: Enable Salesforce screen pops in MaxAgent

# **Salesforce Lightning Experience Integration**

If you are using the Lighting Experience, you need to create a Lighting app to enable the softphone.

- 1. Log into Salesforce.com with administrator privileges. Click **Setup** near the top of the page.
- 2. Use the *App Manager* to create a new Lightning app that uses Console Navigation. Optionally, you could also choose to enable *Service Setup*.
- 3. Add the Open CTI Softphone to your utility bar.
- 4. Add the navigation items that you want.
- 5. Assign the app to the user profiles for those users whom you want to access the app.



When you launch your new Lightning app, the softphone will look similar to the following figure:

	Q	Search Salesforce	_						• ?	Û Ê	2
	Demo	Contacts	$\sim$	🖽 China K	~ ×	¥≣ Tasks	$\sim$ $\times$	🏗 Kevin /	4 ∨ ×	More	$\sim$
	contacts Recently Viewe	d 🔻					1	lew Imp	ort A	dd to Campa	aign
) iter	ns • Last updated a few seco	nds ago						• •	▼ C'		Y
	NAME	ACCOUNT NAME	ACCO	UNT SITE	PHONE	E	EMAIL		CONTAC	T OWN	
	China Kino				<b>L</b> 114				KSong		•
	Blake Griffin				<b>C</b> sip:b	lake.griffin@	kino.com		KSong		•
	Chris Bosh				<b>L</b> 113				KSong		•
÷	Tom Ripley	United Oil & Ga			<b>(</b> 650	) 450-8810	tripley@	uog.com	KSong		•
L	Phone _				<b>C</b> sip:k	evin.love@ki	no.com		KSong		▼
-		-			<b>(</b> 650	) 450-8810			KSong		▼
2	* ▲				<b>(</b> 212	) 842-9900			KSong		•
					0000	01001			KSong		•
					<b>(</b> 512	) 757-6000			KSong		•
	Feed 📞 Phone										

Figure 27: The softphone from the new Lightning app

Note that if you have a previous version of Salesforce Connector deployed, then you will need to re-import the Call Center to enable Lightning support.

#### **Deploy a Standalone Salesforce Integration Server**

Salesforce Integration can be deployed on a separate server from the MaxACD server.

To deploy it on a separate server, you must perform an additional step after you perform the installation steps in this guide:

Modify the ALTISERV\_ADDRESS in C:\Program Files (x86)\AltiGen\SalesforceIntegration\WebProxy\Web.config to be the address of your MaxACD server.

#### **AltiGen Technical Support**

Authorized AltiGen Partners and distributors and Direct Customers on a Direct Support Plan may contact AltiGen technical support by the following methods.

• You may request technical support on AltiGen's Partner web site, at <a href="https://mspartner.altigen.com">https://mspartner.altigen.com</a>. Open a case on this site; a Technical Support representative will respond within one business day (Tier 1 Direct Customers must call to open a case).



• Call 888-ALTIGEN, choose option **5** from the IVR, or 408-597-9000, option **5** from IVR, and follow the prompts. Your call will be answered by one of AltiGen's Technical Support Representatives or routed to the Technical Support Message Center if outside of normal business hours and no one is available to answer your call.

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

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

Please be ready to supply the following **required** information when calling in for Support:

- Partner ID
- AltiGen Certified Engineer Tech ID
- MaxACD version number
- The telephone number where you can be reached

Be prepared to answer the following questions:

- Is this a virtual or a standalone server installation?
- If this is a virtual installation, it is installed in VMware environment or Hyper-V? What is the version number of the virtual server?
- How much memory and how many CPU's are reserved for MaxACD Server use? Memory and CPU cores should always be dedicated and reserved for MaxACD Server use exclusively.
- Are SSD drives installed? If not, be prepared to describe what NAS devices are installed and whether they are shared or dedicated to the MaxACD server.