



# MaX UC: Unified Communications Desktop User Guide



Green Platform

The following guide gives a description of the most commonly used features of MaX UC Mobile. Please refer to the installation instructions for information on downloading and launching the client. Please note that certain features like Meeting and SMS are add-on capabilities.

MaX UC lets you make calls from anywhere using the most convenient device. Therefore, if you place a 911 call from MaX UC Communicator, the 911 operator may not be able to identify where you are calling from, thus this is not suggested for emergency use.

Your account credentials are required to log into the application. The credentials are your **telephone number** and **CommPortal password**. If you do not have this information, please contact your system administrator or Telesystem directly.

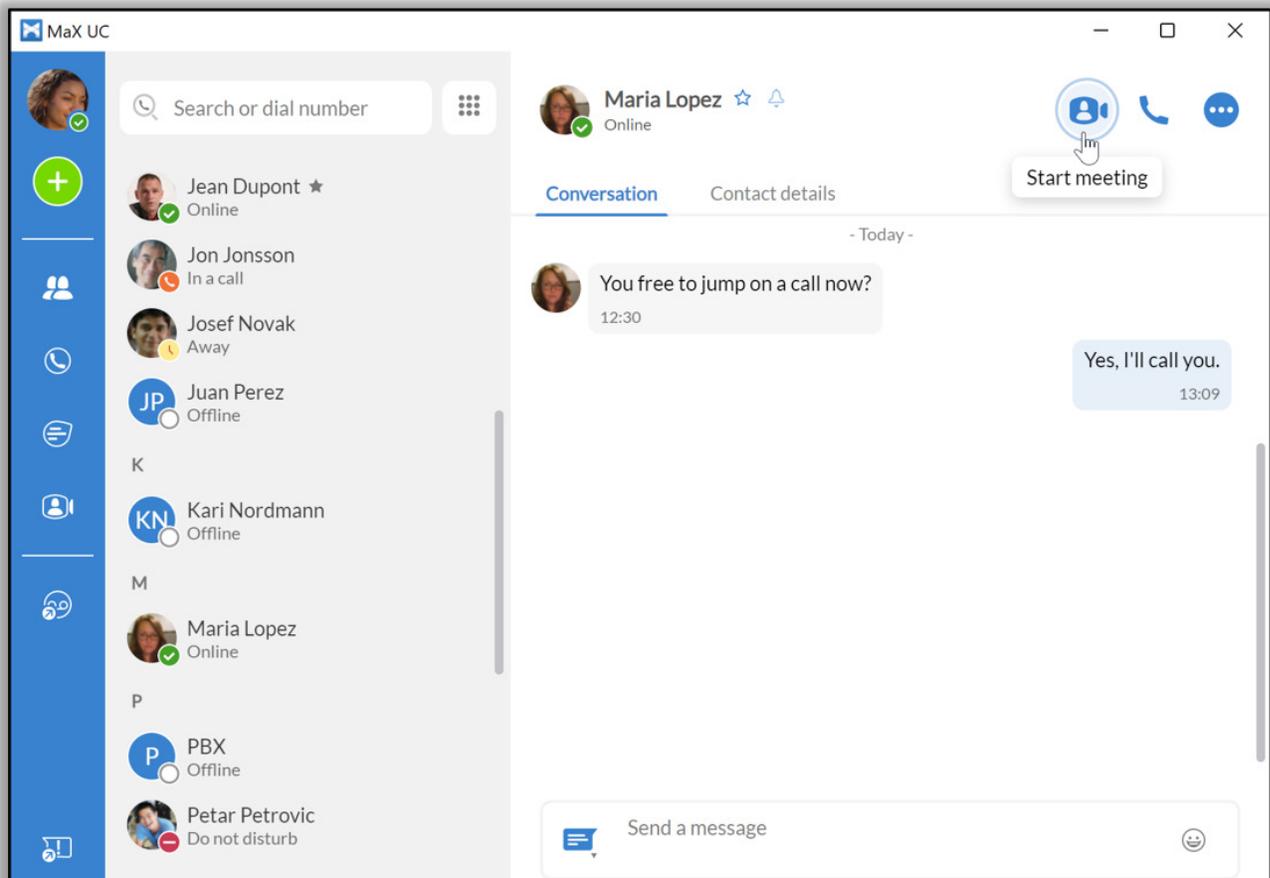
This guide will highlight many benefits of the MaX UC client. If you are a Meeting user, please see the **MaX Meeting** guide for an explanation of all Meeting features!

## MaX UC Desktop Basics



To launch the installed application, choose the application from the start menu or click on the associated desktop icon then enter your credentials when prompted. While running, the MaX UC program may be minimized.

### Getting Acquainted with MaX UC Desktop



## CHANGE AVATAR

The avatar drop-down menu includes options to: Change avatar, Change password, View account..., and Check for updates.

Depending on the services configure for your account, the avatar menu also contains a link to your Call Park orbits, Apps, Conference manager, and Groups.

## SETTINGS

Select your avatar and select Settings to access your General, Calls, Meetings, and Chat settings, test your Audio and Video, or view your Web Apps settings (including Conferencing, File sharing, CRM, and other cloud-hosted services).

## ADD

Select the Add icon to start a New call or New group chat, Add contact, Create a meeting, or Schedule a meeting.

## CONTACTS

Select the Contacts tab to view  your list of contacts.

Depending on how your service is set up, the contact list may include:

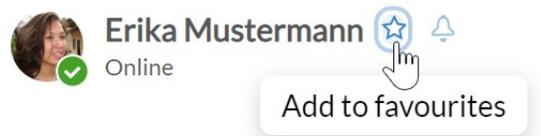
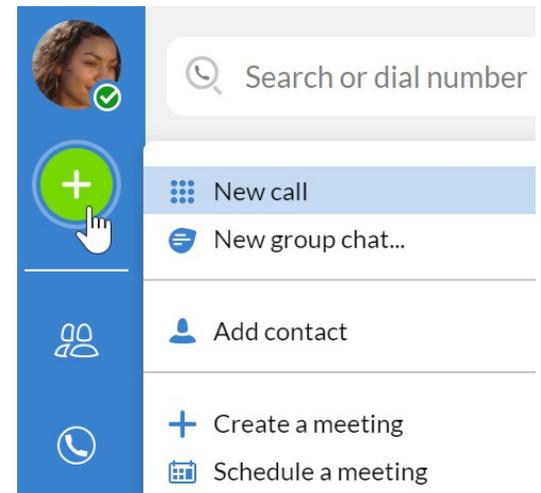
- Contacts saved directly to MaX UC Desktop.
- Contacts in the Outlook or Mac address book stored locally on your computer.
- Contacts from CommPortal
- Contacts in your corporate directory.

Select a contact and select the Contact details tab to view contact information and your call history with the contact. Select

the More icon  to View chat history, Add to favorites, Edit contact, or Delete contact.

## FAVORITES

For quick access to frequently contacted people, click on the Star icon to add the contact to your Favorites. Favorites appear at the top of the Contacts list.

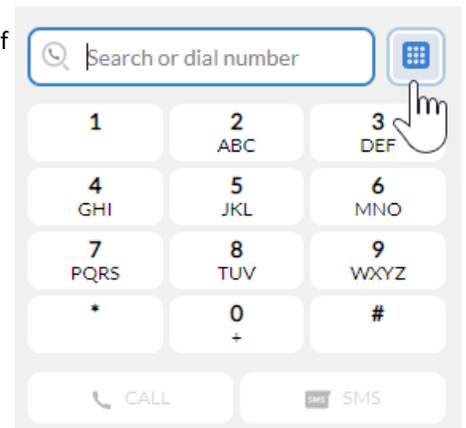


## MAKE A CALL

 On the Calls tab, select a contact and click the Call icon to call the contact. If your contact has more than one number, choose the number to call from the drop-down list.

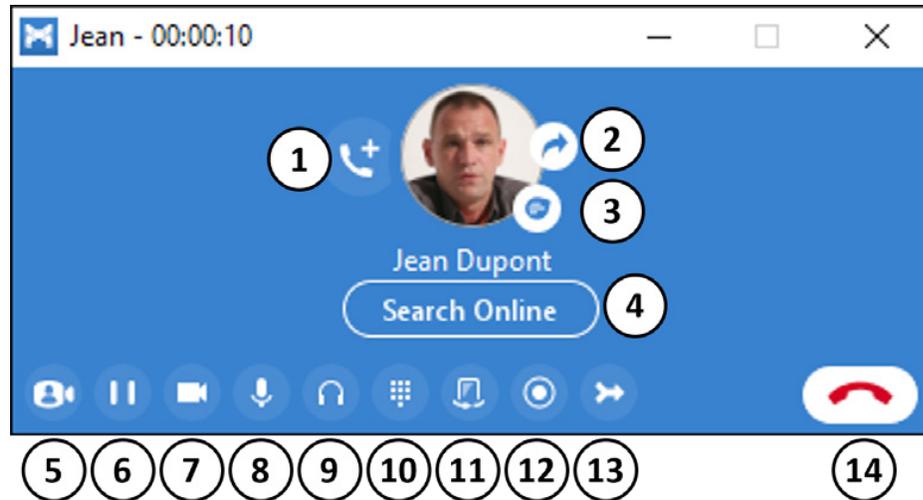
You can also click on the Dialer and enter a number to call on the keypad.

If the person you are calling has Caller ID, they see your company phone number.



## DURING A CALL

While a call is in progress, you can use the call window to:

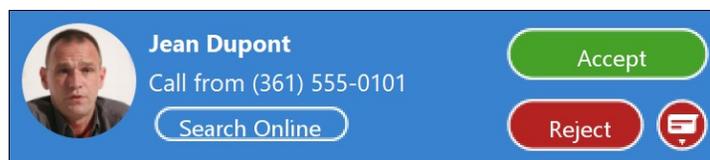


1. Add a participant.
2. Transfer the call to another contact, number, or device with MaX UC Client installed, without having to hang up!
3. Send a chat message to the other person.
4. Look up the contact in your Customer Relationship Management (CRM) system.
5. Uplift the call to Meeting.
6. Put the call on hold.
7. Turn your video on or off.
8. Mute your microphone.
9. Adjust the volume.
10. Access the keypad.
11. Switch to another call.
12. Record the call.
13. Merge calls.
14. End the call.

During a call, you can make a second call using the main client rather than the active call window. This automatically puts the first call on hold. When the second call is active, you can click on the Transfer call icon to show the held call as a transfer option.

## RECEIVE A CALL

When someone calls your Company number, you can see a pop-up window on your computer screen and hear a ringing tone through your speakers or headset. The pop-up shows the number of the person calling you. If the person's details are in your contacts list, the pop-up displays the caller's name.



Depending on the other services you have from Company, you may see the incoming call on your desk phone, mobile phone, or tablet device. You can answer the call on whichever device is most convenient for you.

If the caller is in your Contacts list, you can reject a call and send the caller an instant message explaining why you can't take the call. Select the drop-down list next to Reject and select one of the system messages, or select Custom Message to type your own message.

You may receive a call while you are already on another call. If you answer the new call, the current call is automatically placed on hold and the new call appears in a new call progress window. Switch between the two calls using the window for each one or select the Merge calls icon to merge other callers into a single call.

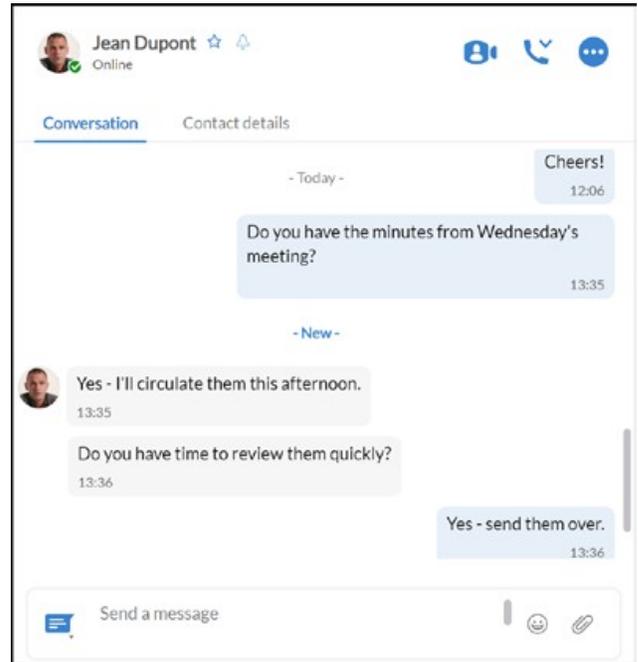
## CHATS



If you have MaX UC Desktop with Instant Messaging, click on the Chats tab and select a contact to send them an instant message, emoji, or file. You can also view your chat history with the contact on the Conversation tab.

## CALL AND CHAT HISTORY

**You can see your recent call history on the Calls tab and your chat history on the Chats tab. Click on a contact and select the Conversation tab to see your chat history with the contact or the Contacts details tab to see your call history with the contact.**



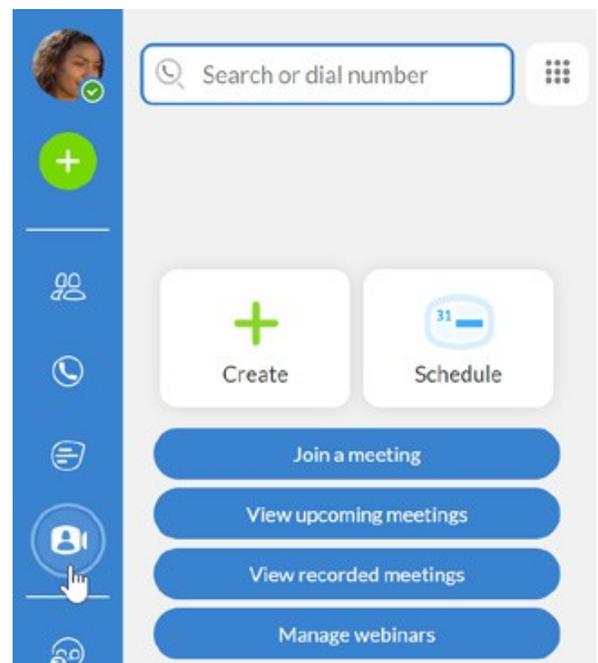
## MEETINGS

Select the Meetings icon for a contact to invite them to an instant Meeting.



On the Meetings tab, select Create to start a meeting or Schedule to arrange a meeting for a future time.

You can also Join a meeting, View upcoming meetings, and View recorded meetings, and Manage webinars.



## PRESENCE

Select your avatar to set your status to Online , Busy , or

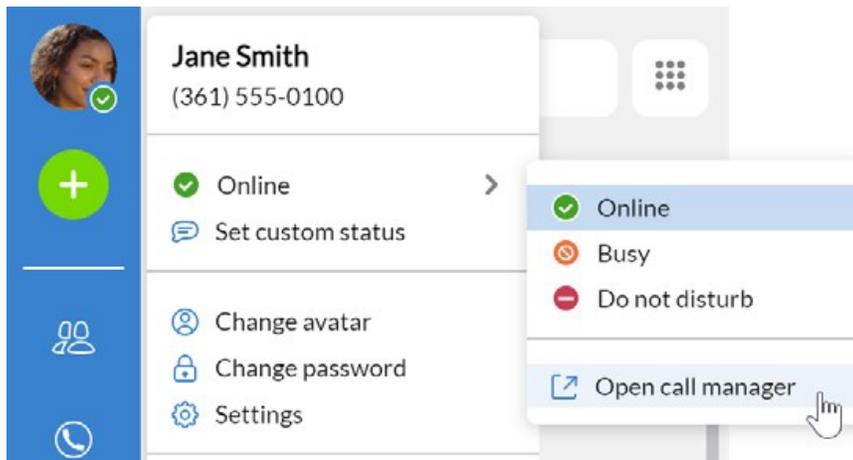
Do Not Disturb .

Select Set custom status to write your own status (maximum 100 characters) and select Save.

Your Presence information automatically shows when you are Away , In a call , In a Meeting  (this references your Outlook calendar), or Offline .

## CALL MANAGER

You can select Open call manager from the status drop-down to access your Call Manager and tell MaX UC Desktop how to handle your incoming calls.



You can choose Available for Calls or Do Not Disturb.

If you select Do Not Disturb, callers hear a recorded voice announcement saying that you are unavailable and are then connected to your voicemail. None of your devices will ring until you turn off Do Not Disturb, so be sure to use it carefully!

When your phone is busy, you can set it to Forward to another phone (and enter the phone number to forward calls to) or Send to voicemail.

You can also specify how calls should be handled if they are from anonymous numbers, from VIPs, or from numbers on your Unwanted Callers list.

Note that when you change your Presence or Call Manager settings, the change applies on all your MaX UC Clients. So, if you step away from your computer and forget to update your status, you could change your status using MaX UC Mobile on your mobile phone instead.

## VOICEMAIL

**If you have a voice or video message, the Voicemail tab indicates the number of messages received. Select the Voicemails tab to view and listen to the messages received or read transcriptions of the messages into text (where available).**



## NOTIFICATIONS

Go to your Mac or Windows system notification settings and select the MaX UC app to configure your MaX UC Desktop notification preferences.

## ACCESSIBILITY

MaX UC Desktop supports the use of a screen reader.

Use Tab and the arrow keys to navigate through the application. You can also use the following shortcuts during a call.

- Ctl-Alt-Shift-A to answer an incoming call.
- Ctl-Alt-Shift-H to end a call or reject an incoming call.
- Ctl-Alt-Shift-P to end a call or answer an incoming call.
- Ctl-Alt-Shift-M to mute or unmute your microphone.

## EMERGENCY CALLS

MaX UC lets you make calls from anywhere using the most convenient device. Therefore, if you place a 911 call from MaX UC Communicator, the 911 operator may not be able to identify where you are calling from, thus this is not suggested for emergency use.

## PRIVACY AND PROTECTION

Once you have finished using MaX UC Desktop, select your avatar and select Quit to close the application. If you are using a shared computer, select your avatar and select Log Out to prevent other users from accessing your account.

To change your log-in preferences, select your avatar, select Settings and, on the General tab, untick Automatically log in to MaX UC Desktop; this prevents MaX UC Desktop from logging in automatically when started and ensures that the next user must log in using their own credentials.