

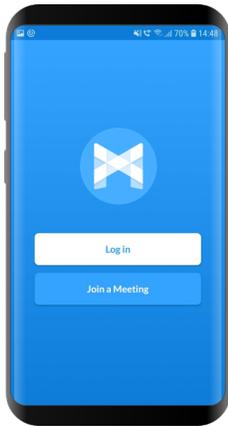


The following guide gives a description of the most commonly used features of MaX UC Mobile. Please refer to the installation instructions for information on downloading and launching the client. Please note that certain features like Meeting and SMS are add-on capabilities.

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.

## Logging In and Out



You must be logged into the MaX UC mobile application to use its features.

To launch the installed application, tap icon on your mobile phone, tap **Log In**, then enter your credentials (direct dial phone number and password).

*Important: This application runs in the background. This means that if it is closed, calls and chats will continue to come to your device. To prevent this, you must log out.*

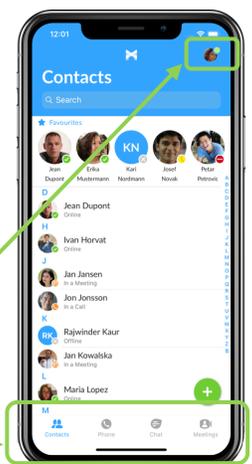
To log out of the application, tap your circular **Profile** icon on the top right then scroll down to tap **Log Out**.

## Explore MaX UC for Mobile

MaX UC for Mobile is like having your desk phone on your mobile with added features of chat and presence notifications. You can make and receive calls, hold calls, transfer calls, and make three-way calls. You can even push and pull calls from your phone to other twinned devices, mid-call.

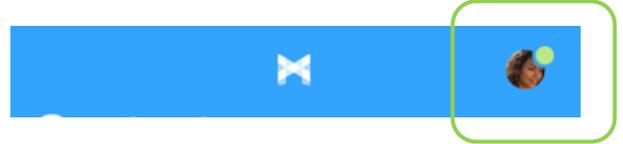
MaX UC uses the Wi-Fi, broadband, or mobile data services available, so you can make and receive calls without using your mobile minutes.

Navigate the app sections by tapping on the **bottom** tabs or the profile icon on the **top** right of the application.



# Profile & Settings

You can change various call settings and use additional features through the Profile & Settings section. Tap on your avatar in the top-right corner to access these options.

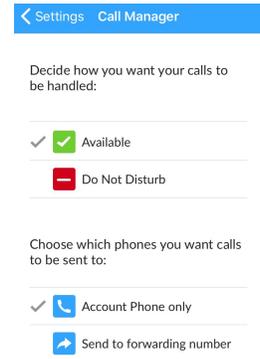


## Call Manager

You can tell MaX UC how to handle your incoming calls. Tap the **Call Manager** option in the Profile & Settings window to modify your incoming call options with one of the following:

**Do Not Disturb** makes you unavailable for calls. It sends incoming callers immediately go to your voicemail. None of your devices will ring until you turn on Do Not Disturb, so be sure to use it carefully.

**Send to forwarding number** may be used by entering a *Forwarding number* in the associated field. This sends all incoming calls to a different phone number instead of ringing your own.



# Contacts Tab

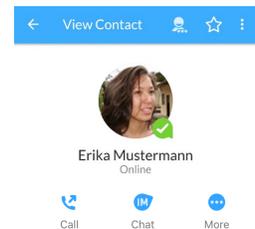


MaX UC for Mobile assembles a contact list for you to use. Tap **Contacts** tab to view the list. Depending on how your service is set up and what you have allowed the application to access on your device, the Contacts list may include:

- contacts that you add directly into MaX UC for Mobile
- contacts stored on your mobile device
- contacts in CommPortal contacts
- contacts in your business group directory

While viewing a contact, you can access **Call**, **Chat**, and (if available) **meeting** options beneath their name.

Tap the **Plus**  to add new contacts.



## Presence

MaX UC indicates **presence** for contacts in your business group. This allows you to understand their availability prior to contacting them. This presence shows while looking at the contact entry at any time.

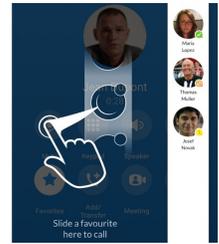


## Favorites

Tap the **Star**  icon on a contact's directory entry to add the contact to **Favorites**.

**Favorites** appear in a banner at the top of the **Contacts** tab

During a call, tap the **Favorites** icon to view your favorite contacts. Drag and drop a contact into the call window to setup a new, separate call. When the contact answers, you can merge both calls to create a 3-way call.



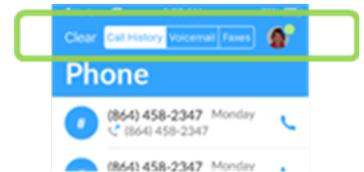
## Phone Tab



MaX UC for Mobile allows you to make and take calls as if you are at a desk phone. Tap the **Phone** tab to make a call, review calls, or manage messages.

Tap the top tabs to navigate to one of the following sections (please note, faxing may not be enabled)

- **Call History** tab shows the most recent missed, dialed, or received calls from any of your devices. Tap on an entry to call, message, or add them to your directory.
- **VoiceMail** tab shows messages saved to your account. Manage voicemail messages by reviewing, forwarding, deleting, or calling the contact back. Please note that if you have elected to *only* receive your voicemails to your email, messages may not be saved here.
- **Faxes** tab appears if an incoming fax number has been added to your account. Tap this section to see fax messages.



To make a call, tap the **Dialer** icon  then enter the number or extension on the dialpad. Dialing \*99 will access your own voicemail box and allow you to record a personalized greeting.

## Live Call Features

### Receiving Calls

While logged into the application, incoming calls will look very similar to a “normal” incoming call to your device. You will see the caller ID information followed by the MaX UC  logo while the call is ringing.

### Pull Call to Your Device

If you are on a call on another one of your devices (for example, your desk phone), you may seamlessly *pull* the call to the MaX UC application to continue it there. This feature is only available when you are on one phone call across all devices.



To Pull a live phone call to MaX UC Mobile, tap the *Call available to pull* box shown above then tap the screen to complete the call retrieval as prompted.

## In Call Screen

While a call is in progress, the call window will allow you to do the following:



**Mute** your microphone



Access the **Keypad**



Turn on the **Speaker**



Put the call on **Hold**



Invite a **Favorites** contact to join the call



Add a third party into your existing call or Transfer the caller.



Uplift the call into a MaX **Meeting** (while talking to another MaX user, you can change your voice-only call into a collaborative session).



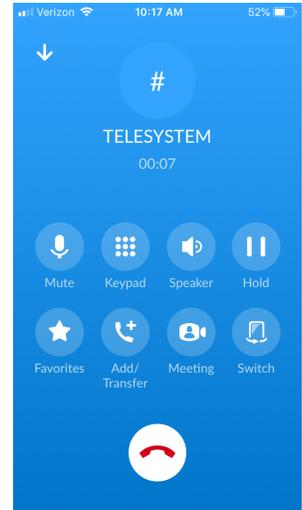
**More**- tap to reveal one or both of the following options:

**Video**- add in video for 1-on-1 calls between you another MaX UC user within your enterprise (see the "About Video" section that follows)

**Switch** –seamlessly switch the current phone call to an alternate device programmed with your number (such as your desk phone).



**End** the current call.



## About Video Calling

Important notes about video calls:

- MaX UC users can uplift voice phone calls into a 1-on-1 video call with other MaX UC users in their own business group.
- This option requires that you've allowed the application permission to access your device camera(s).
- Please note that the available features during a video call will be curtailed (video call options include Mute, Keypad, Speaker, End Call and Meeting).
- Video calling is not available to users that have the iACD feature or call recording enabled on their line.

## Chat Tab



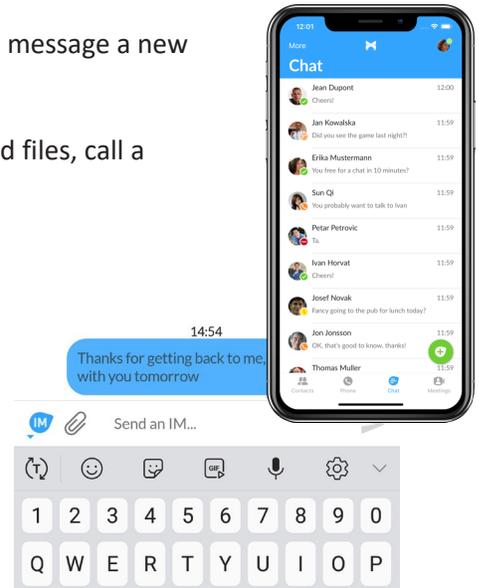
Chat

MaX UC for Mobile allows you to send and receive instant messages from other Max UC users and send text messages to other SMS-enabled devices. Tap the **Chat** tab to initiate messaging.

Tap on a previous conversation listed to continue it or tap the  icon to message a new contact.

From within the chat window you can start of continue a conversation, send files, call a contact, or add additional participants to your conversation.

*If you have SMS capabilities enabled on your account, you may choose to send an SMS (text message) to another SMS-enabled phone such as a cell phone. The process is essentially the same as chat, but the conversation window will indicate you are sending a SMS instead of an IM. Please note that the SMS feature is an upgrade that must be added to your account. Usage charges may apply. Please contact your sales representative for details.*



## Meeting Tab



If the feature is enabled, MaX UC for Mobile allows you to create instant or scheduled MaX Meetings. These virtual rooms allow you to collaborate efficiently with internal and external users. Tap the **Meetings** tab to manage your meetings.

### Set Up a Meeting

In MaX UC Mobile, you can set up a meeting instantly in various ways:

- Tap  while viewing a **contact**
- Tap  during an internal **chat**
- Tap  while on a phone **call**
- Going to the **Meetings** tab to **create** an instant or **scheduled** meeting. If the *schedule* option is chosen, you may specify timing, audio, and video settings for the meeting.



In each scenario above, you have the option to invite to *Invite IM Contacts* that are currently logged into MaX UC or *Invite Others* via an email or a URL link.

### Viewing Meetings

You can view your pre-scheduled meetings via MaX UC Mobile by tapping on the *Meetings* tab and selecting *Upcoming Meetings*.

Select a meeting to **start** it immediately, **edit** its details such as audio or video preferences, or **invite** participants, or **delete** the meeting.

### Explore the Meeting Window

While a meeting is in progress, tap to view the toolbar at the bottom of the Meeting window:



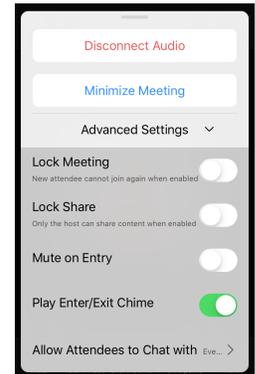
- Tap **Mute** to toggle your microphone on or off
- Tap **Start/Stop Video** to toggle your video on or off

- Tap **Share Content** to share certain content with participants.

While sharing, the following options may be available:

- ✓ **Spotlight** - swipe or tap on the screen to move the pointer.
- ✓ **Pen** - write or draw on the screen.
- ✓ **Highlighter** - swipe over the screen to highlight a section.
- ✓ **Color** - change the color of your writing tool.
- ✓ **Erase** - swipe over a section of the screen to delete the content.
- ✓ **Clear** - delete all the whiteboard content.

- Tap **Participants** to view and manage the meeting participants.
- Click **More** to access manage audio and access advanced settings such as:
  - **Lock Meeting**- allow/disallow new attendees to join
  - **Lock Share**- allow/disallow participants to share content during the meeting
  - **Mute on Entry**- mutes each participant automatically when they join the meeting
  - **Play enter/exit Chime**- plays a chime when participants enter and leave the meeting
  - **Allow Attendees to chat with each other/host only**- allows you to choose whom the attendees may sent chat messages during the meeting



Tap **End** to leave the meeting or end it for all participants.

## Participants Pane

Tap **Participants** to see who has joined the meeting. The following icons provide information about each attendee.

-  The participant is currently speaking.
-  The participant's microphone is on.
-  The participant's microphone is off.
-  The participant's video camera is on.
-  The participant's video camera is off.
-  The participant has raised their hand.

At the bottom of the **Participants** window, moderators can access the following options:

- **Chat** – start or continue a conversation with all meeting attendees or specific attendees.
- **Invite** - to select additional contacts you want to invite to join you in the meeting. *Invite IM Contacts* allows you to send an instant invitation to other users that are currently logged into MaX UC or *Invite Others* via an email or a URL link.
- **Mute All** - (for meeting hosts only) mute all meeting participants.
- **Unmute all** - (for meeting hosts only) unmute all meeting participants.