

MaX UC

Desktop

Quick Reference



Powered by: **metaswitch**

2021Q1

Your company phone service can be used to make or receive calls from your desk phone, your PC or Mac, and your mobile devices. For this to work on your desktop, you need to install the MaX UC Desktop software on your PC or Mac. This guide will help you to do that.

ENSURE YOUR COMPUTER / DEVICES ARE COMPATIBLE

MaX UC for Desktop is compatible with PC running Windows 7, 8 or 10. It also runs on Mac OS X 10.7 or later versions. You can use your computer's built-in microphone and speakers, but you will have much better audio quality if you use a headset. MaX UC works with most common headsets, including Bluetooth. It will even work with the answer/reject call button on some headsets.

FIND YOUR PASSWORD

You will need your Company CommPortal phone number and password to log in and start using MaX UC for Desktop. If you do not have this information, contact your administrator, your Momentum Account Manager, or call Customer Support at **855.216.4334**.

INSTALL THE SOFTWARE

Your provider will send you the installer download for MaX UC for Desktop. If you have access, you may also find the download at: **<https://my.uc-view.com>**

When prompted, save the file locally and then open the file and follow the on-screen instructions to install the software. **See also: MaX UC Desktop Installation Guide**

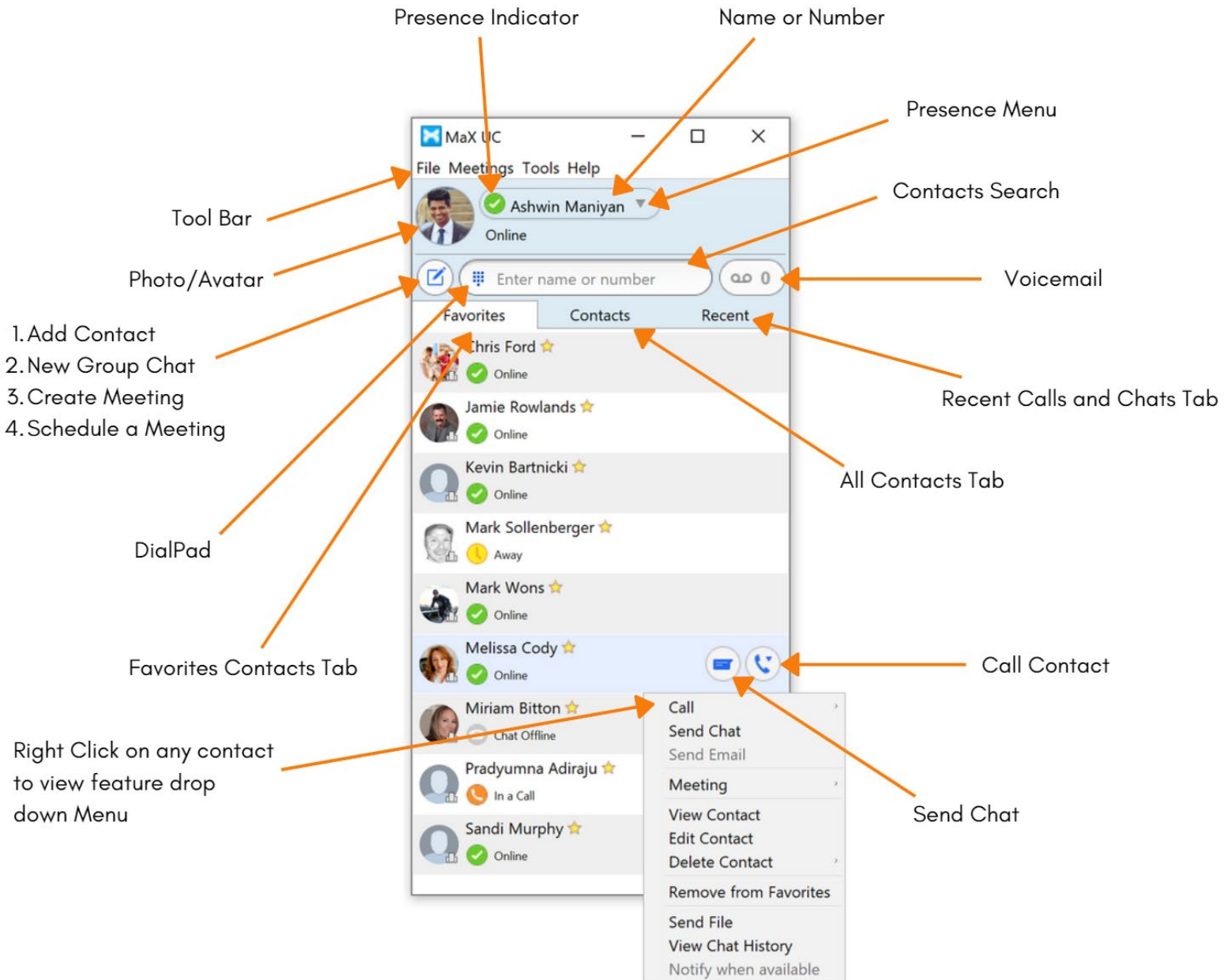
EXPLORING MAX UC

MaX UC for Desktop is like having your desk phone on your computer. You can make and receive calls, hold calls, transfer calls, and make three-way calls.

You can also use MaX UC to send instant messages, transfer files, and send Presence information for other people in your corporate directory who are using MaX UC (on any device).

MaX UC uses the Wi-Fi, broadband, or mobile data services available and connected to your computer.

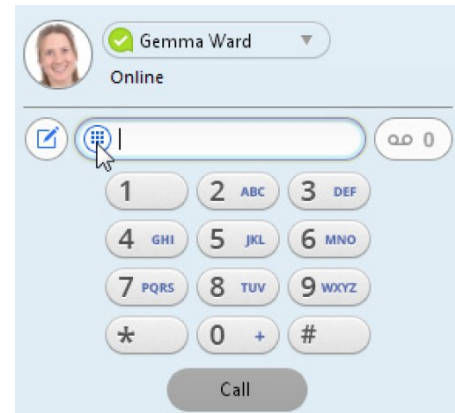
MaX UC Tour



MAKING CALLS

Making a call is as easy as entering the number on the keypad or clicking on a contact's call button.

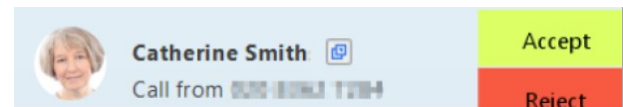
If your contact has more than one number, you can choose which number to call from the drop-down list. If the person you are calling has caller ID, they will see your individual Company phone number.



RECEIVING CALLS

When someone calls your Company number, you will see a pop-up window appear 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 that person's details are already in your contacts list, the pop-up displays the caller's name.

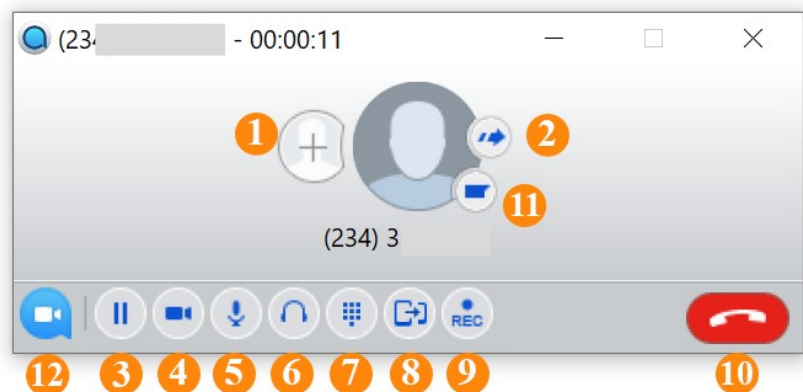
Depending on the other services you have from Company, you may see the incoming call on your desk phone, on your mobile phone, or on a tablet device. You can answer the call on whichever device is most convenient for you.



DURING THE CALL

While a call is in progress you can use the Call Window to:


1. Add a participant.
2. Transfer the call.
3. Put the call on hold.
4. Send video.
5. Mute your microphone.
6. Adjust the volume.
7. Access the keypad.
8. Switch to another call.
9. Record the call.
10. End the call.
11. Send a chat message to the caller.
12. Uplift the call to a Meeting.




You may receive a call while you are already on another call (Call Waiting). 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.

VIDEO CALLING

If the person you are talking to is also using MaX UC on the same network, you can upgrade

your call to video at any time. Click on the Video icon  to send your video. The other person will receive a prompt inviting them to switch on their video too. Click on the Video icon at any time to turn off your video feed.

SEND THE CALL TO SOMEONE ELSE

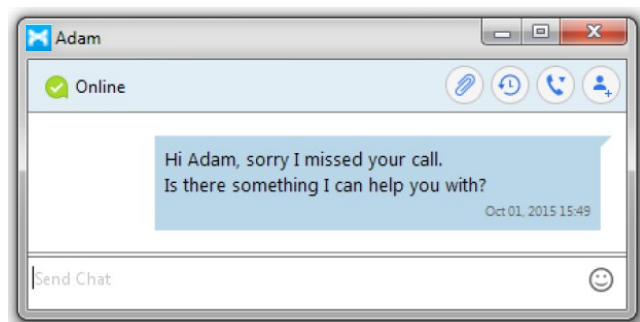
Use the Call Transfer icon  to send any call to another number. A menu will pop-up allowing you to select a contact, or you can type in a completely new number to transfer the call to.

You can also transfer the call to another of your devices that has MaX UC installed, without having to hang up!

INSTANT MESSAGING

If you have MaX UC with Instant Messaging, click on a contact's Chat icon to send them an instant message.

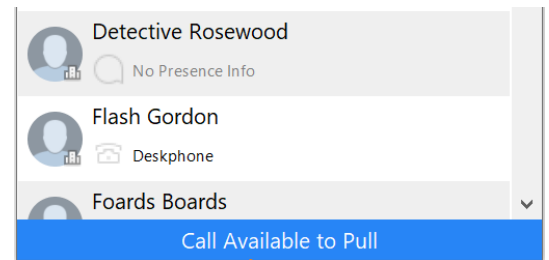
From within the chat window, you can send files, view your chat history with the contact, call the contact, and add one or more participants to the conversation for a group chat.



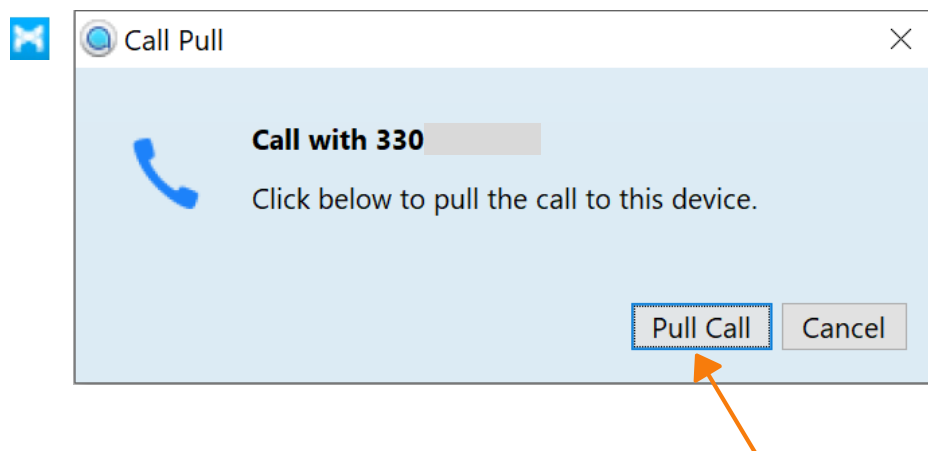
CALL PULL

You can pull a call from your phone or your MaX UC's mobile app to MaX UC's desktop while the call is active.

You will see a pop up for call pull on MaX UC's desktop as shown in screenshot.

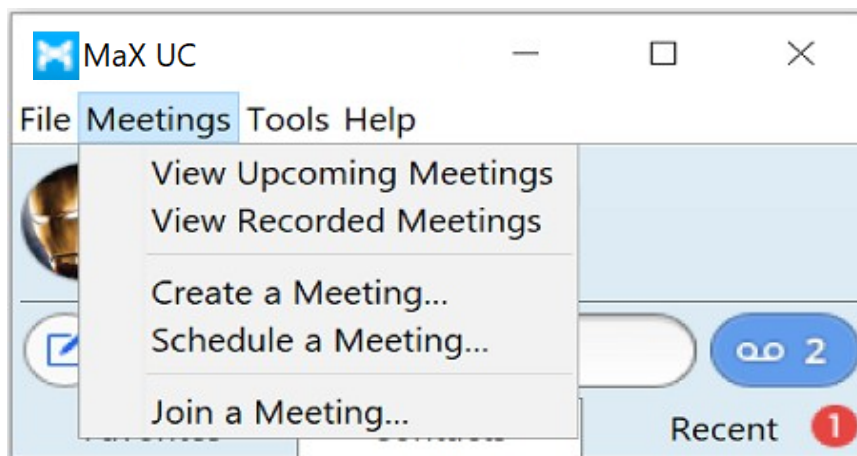


Click on 'Call Available to Pull' and you will see a new pop up as shown below. Please click on 'Pull Call' and call will now be active on your MaX UC's desktop.



MEETINGS *(Availability based on license level/type)*



You can create, schedule or join a meeting through MaX UC's desktop. Click on 'Meetings'. This feature is license based and if you don't see meetings option on your toolbar please contact administrator to upgrade license type. Please read MaX UC's Meeting user guide for more information.






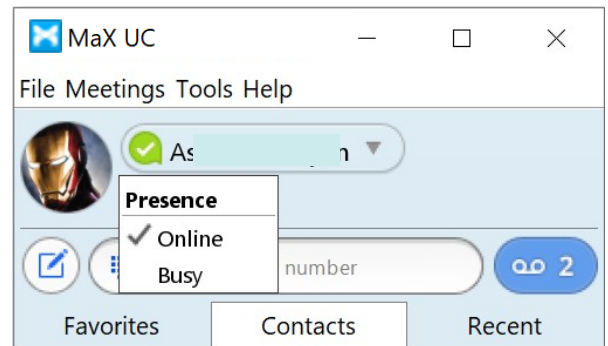
REJECT CALL WITH IM

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. Click on the drop-down list next to Reject and select one of the system messages, or click Custom Message to type your own message.

PRESENCE

Let others know whether you are available or busy by setting your presence to *Online*  or *Busy* .

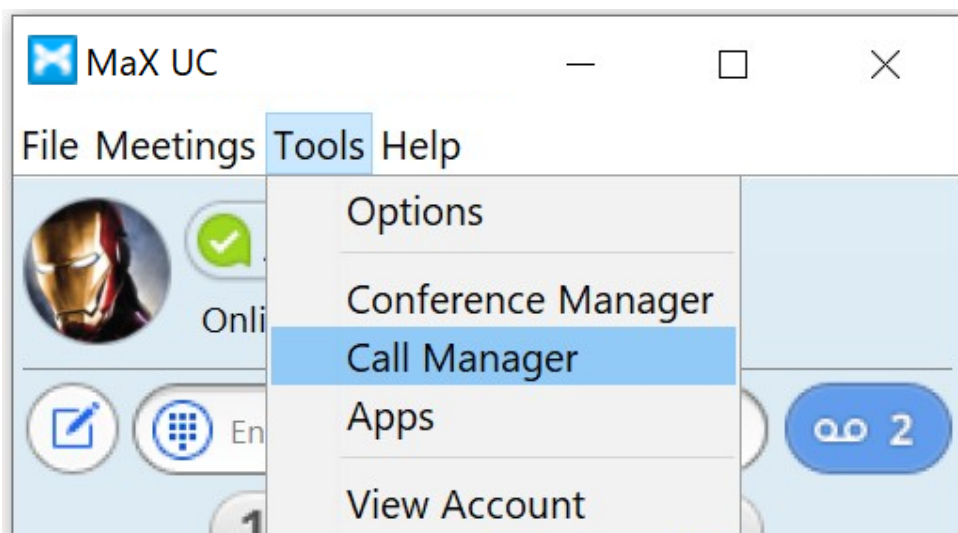
Your Presence information automatically shows when you are *Away* , *On the Phone* , or *In a Meeting*  (this references the information in your Outlook calendar).



CALL MANAGER

You can change your call settings such as call forwarding, Follow me and call screening directly from MaX UC's Desktop app. You can also change the settings by logging into your CommPortal account.

Click on 'Tools' and select 'Call Manager'



1. You can change call forwarding settings by clicking on 'Forwarding', make changes and hit 'Apply'

Phone Status

Summary **Forwarding** Follow Me Screening

Immediately **Busy/No Answer** Unavailable Selected Callers Forwarding Destinations

Apply Cancel

Use same call forwarding configuration for both services.

Forward calls when no answer

Forward calls if you do not answer.

Forward calls to:

234

Hint: Use the Forwarding Destinations tab to add numbers that you frequently forward calls to.

Forward calls when busy

Forward calls if your line is busy. ?

Forward calls to:

Hint: Use the Forwarding Destinations tab to add numbers that you frequently forward calls to.

Forward unanswered call after 36 seconds.

2. To use the **Follow Me** feature tick the checkbox and click on **Add Rule**. Add alternate destination numbers and select the order in which they should ring by adding them as different steps as shown below.

Destination to ring: Other

Telephone Number: 234

Hint: Use the Forwarding Destinations tab to add numbers that you frequently forward calls to.

Ring destination for 36 seconds during step 1

Permit forwarding? Yes No

Description: CellPhone

OK Cancel

Add Rule Clear List

Forward calls you receive to one or more alternate destinations.

	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
Office						
CellPhone						
Office 2						

3. You can change call screening settings by click on screening on home page. You can select Do Not Disturb, Selective Rejection or Anonymous Rejection

Phone Status

Summary
Forwarding
Follow Me
Screening

Do Not Disturb
Selective Rejection
Anonymous Rejection

Edit List
Apply
Cancel

Reject calls if they are from selected callers.

Call To Reject

You are not rejecting calls from any numbers.

YOUR CONTACTS LIST

MaX UC for Desktop assembles a contact list for you to use. Depending on how your service is set up, the contact list may include:


- ◆ Contacts that you type directly into MaX UC for Desktop.
- ◆ Contacts in the Outlook or Mac local address book stored locally on your computer.
- ◆ Contacts in CommPortal contacts.
- ◆ Contacts in your corporate directory.

If MaX UC is configured to automatically sync with Outlook, you can view and edit your Outlook contacts using MaX UC.


FAVORITES

For quick access to frequently called people, add the contact to your Favorites list. Use the right-hand mouse button to click on any contact and choose Add to Favorites from the drop-down list. Favorites appear in the Favorites list and in the Contacts list.

CALL AND CHAT HISTORY

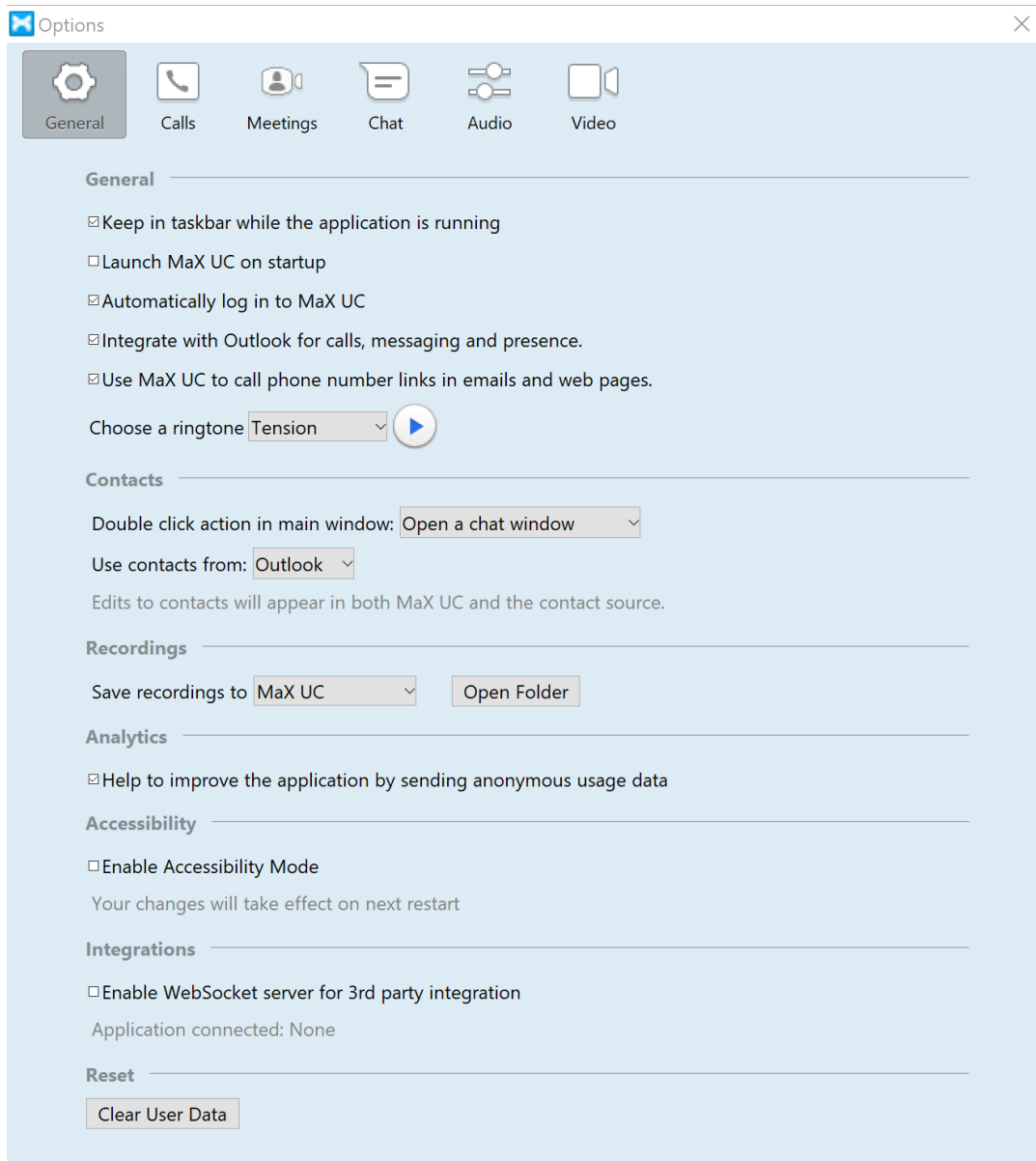
Click on the *Recent*  tab to see your call history. To view the chat history for a contact, click on the contact's Chat icon then click on the History icon in that view.


VISUAL VOICE MAIL (\$ Available as an add-on feature)

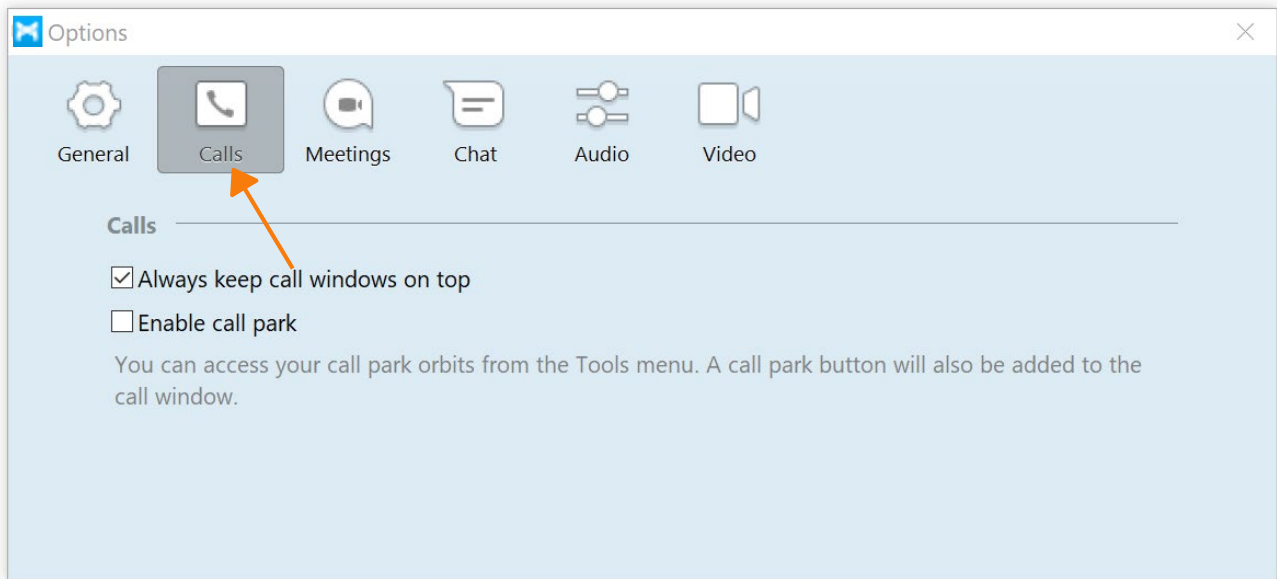
If you have a voice or video message, the Message button changes color and indicates the number of messages received. Click the  messages icon to see a list of messages received, to see transcriptions of the messages into text (where available), or to listen to the messages.

OPTIONS MENU

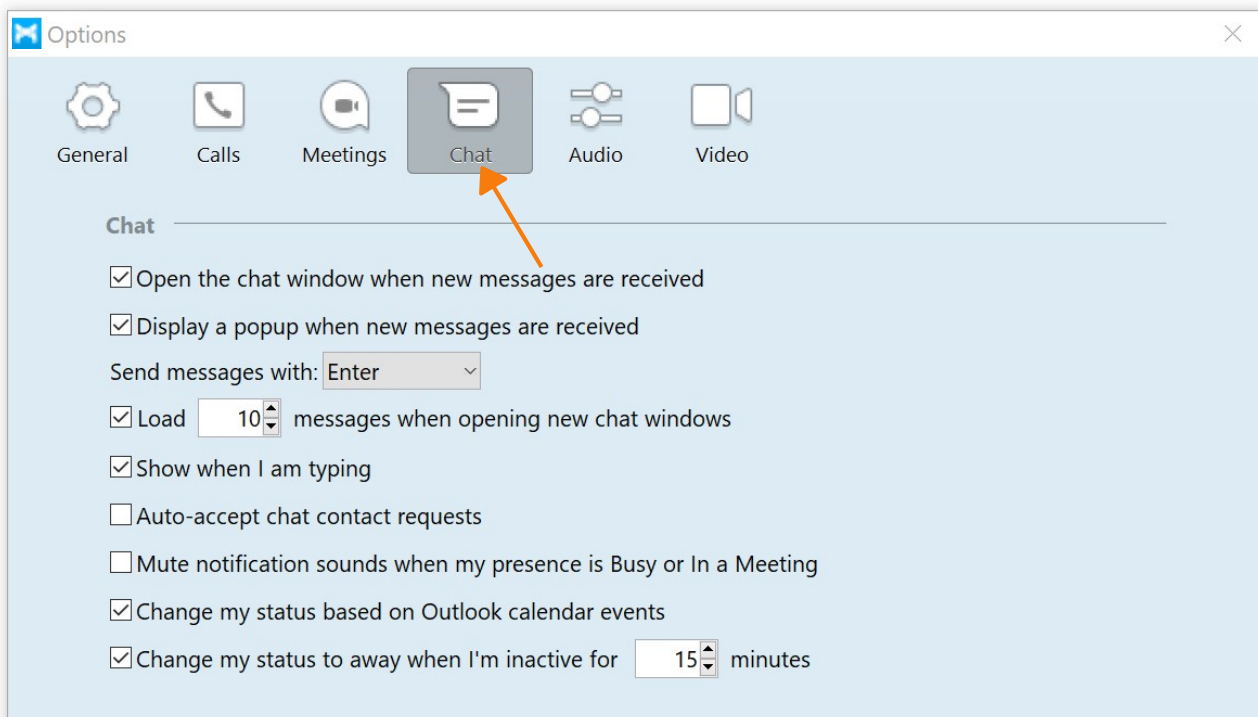
1. Click on the 'Tools' menu and select Options to access your general settings and test your Audio and Video devices.



2. Click on 'Calls' to Enable call park settings. Once enabled a call park icon  will appear during the call.



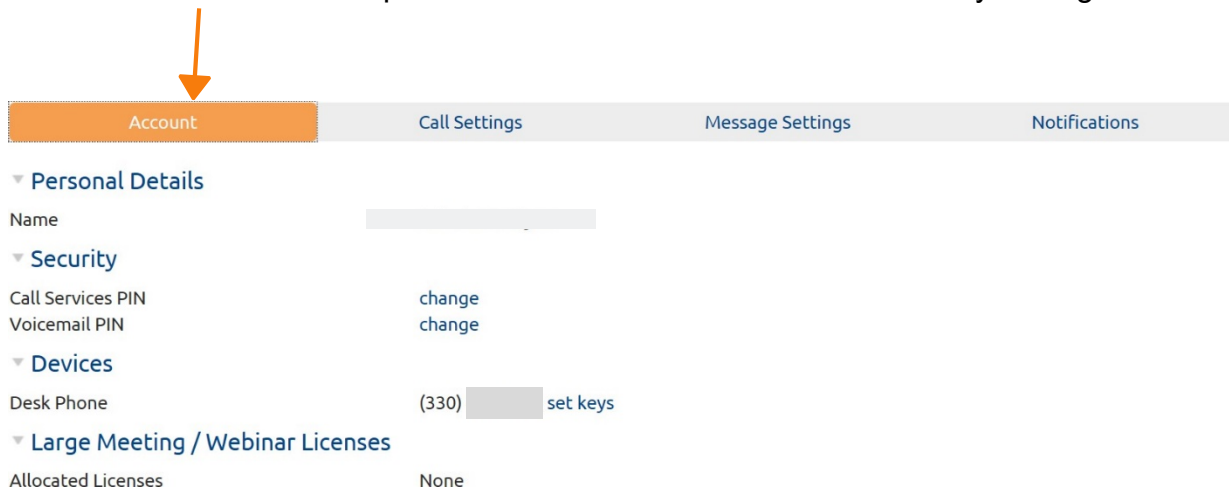
3. Click on 'Chat' to change MaX UC's desktop chat settings.



VIEW ACCOUNT AND CHANGE SETTINGS

You can view your device settings, access device manager, view call settings, view message settings and notifications. Click on 'Tools' and hit 'View Account'. A new window pops up with options: You can also change the settings by logging into your CommPortal account.

1. Click on 'Account' to view personal information and set soft /line keys using device manager



Account Call Settings Message Settings Notifications

▼ Personal Details

Name

▼ Security

Call Services PIN change

Voicemail PIN change

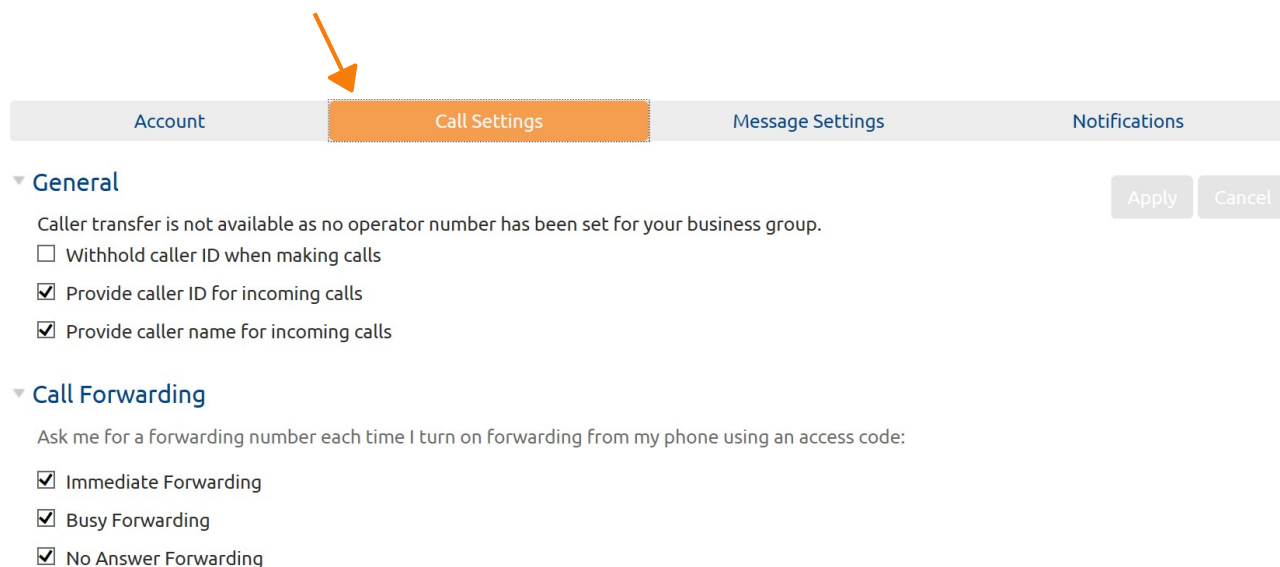
▼ Devices

Desk Phone (330) set keys

▼ Large Meeting / Webinar Licenses

Allocated Licenses None

2. Click on 'Call Settings' to view/edit settings and hit 'Apply'



Account Call Settings Message Settings Notifications

▼ General

Caller transfer is not available as no operator number has been set for your business group.

Withhold caller ID when making calls

Provide caller ID for incoming calls

Provide caller name for incoming calls

Apply Cancel

▼ Call Forwarding

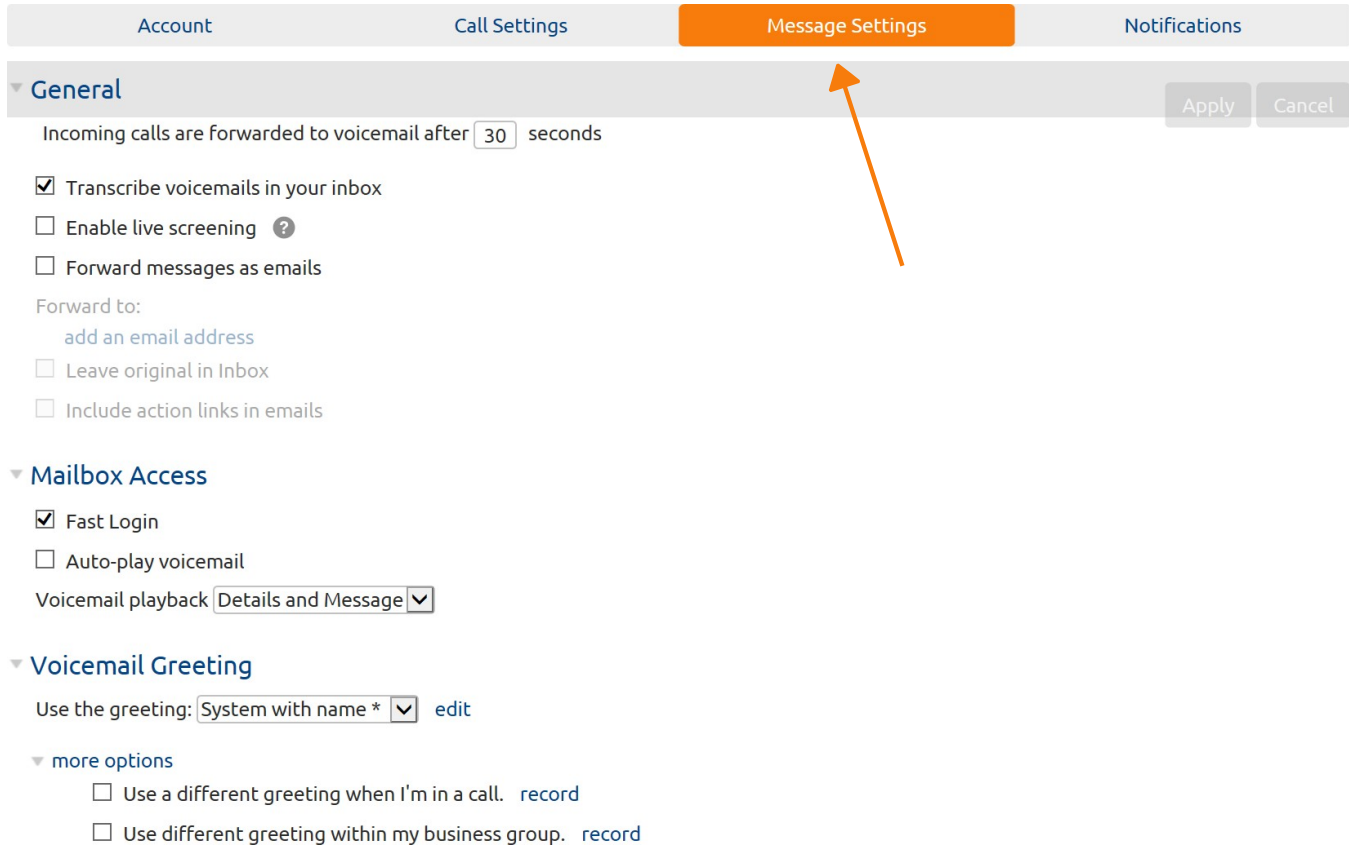
Ask me for a forwarding number each time I turn on forwarding from my phone using an access code:

Immediate Forwarding

Busy Forwarding

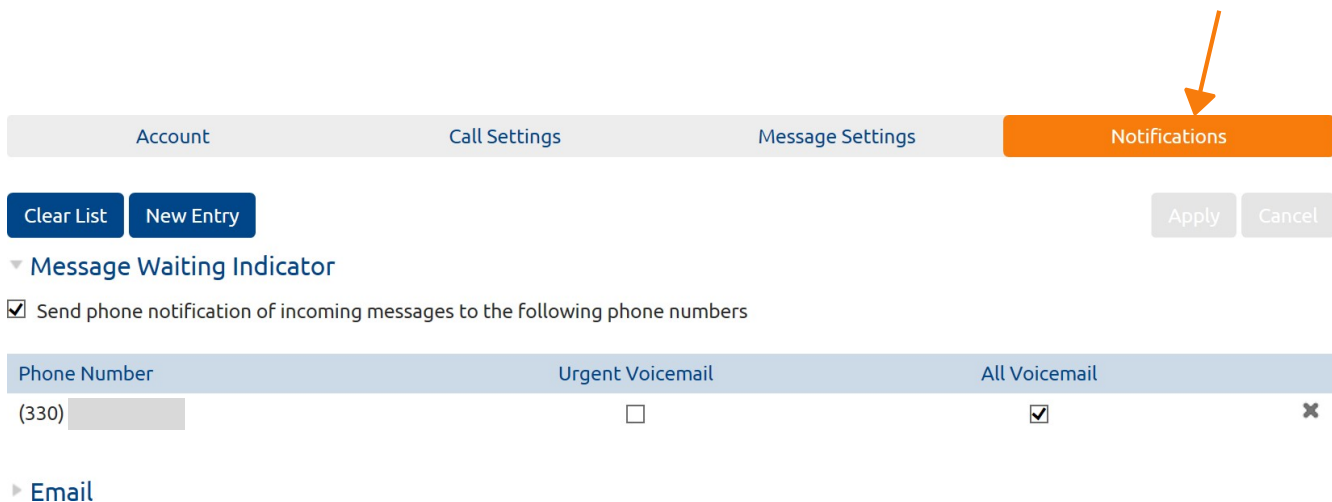
No Answer Forwarding

3. Click on 'Message settings' to view/edit current voicemail settings and hit 'Apply'



The screenshot shows the 'Message Settings' tab selected in a navigation bar. Below the navigation bar, there are sections for 'General', 'Mailbox Access', and 'Voicemail Greeting'. The 'General' section includes a dropdown for 'Incoming calls are forwarded to voicemail after' set to '30' seconds, and checkboxes for 'Transcribe voicemails in your inbox', 'Enable live screening', and 'Forward messages as emails'. The 'Mailbox Access' section includes checkboxes for 'Fast Login' and 'Auto-play voicemail', and a dropdown for 'Voicemail playback' set to 'Details and Message'. The 'Voicemail Greeting' section includes a dropdown for 'Use the greeting:' set to 'System with name *' and an 'edit' button. There are also 'Apply' and 'Cancel' buttons at the top right of the settings area.

4. Click on 'Notifications' to set phone number and email address to be used for notifications




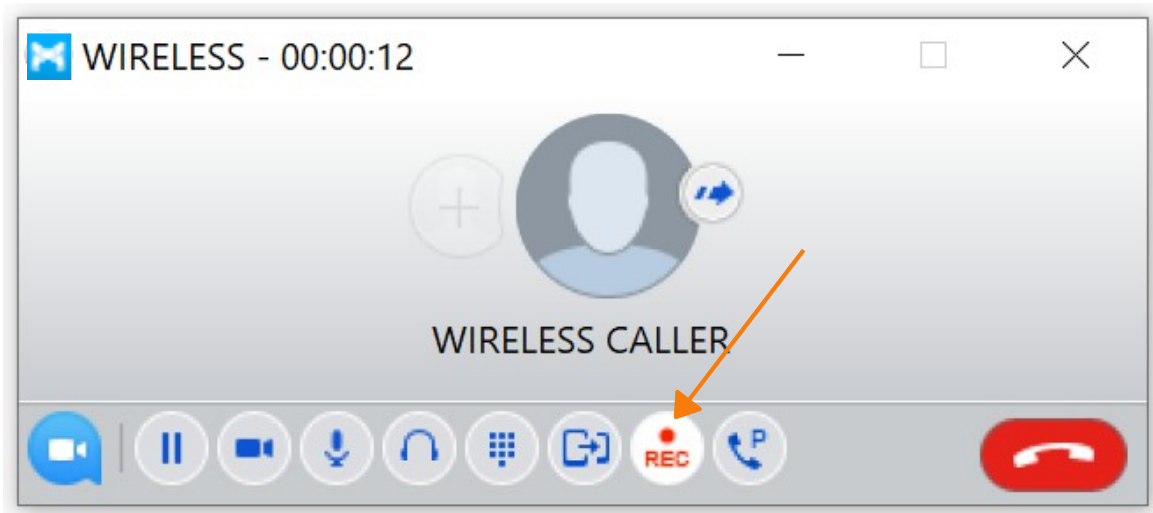
The screenshot shows the 'Notifications' tab selected in a navigation bar. Below the navigation bar, there are buttons for 'Clear List' and 'New Entry', and 'Apply' and 'Cancel' buttons. The 'Message Waiting Indicator' section includes a checkbox for 'Send phone notification of incoming messages to the following phone numbers'. Below this is a table with columns for 'Phone Number', 'Urgent Voicemail', and 'All Voicemail'. The 'Phone Number' column contains '(330) [redacted]'. The 'Urgent Voicemail' column has an unchecked checkbox. The 'All Voicemail' column has a checked checkbox. There is also an 'Email' section partially visible at the bottom.

Phone Number	Urgent Voicemail	All Voicemail
(330) [redacted]	<input type="checkbox"/>	<input checked="" type="checkbox"/>

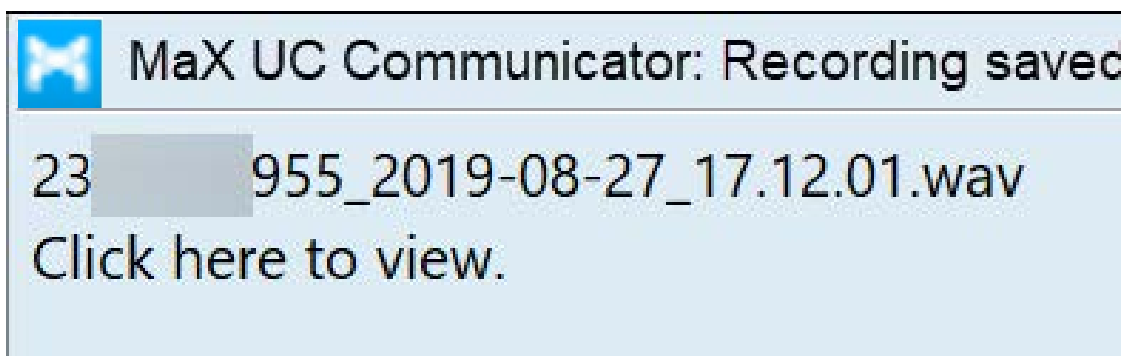
CALL RECORDING

Incoming and Outgoing calls can be recorded manually from MaX UC's Desktop client. Recordings are stored locally on your computer. To record a call :

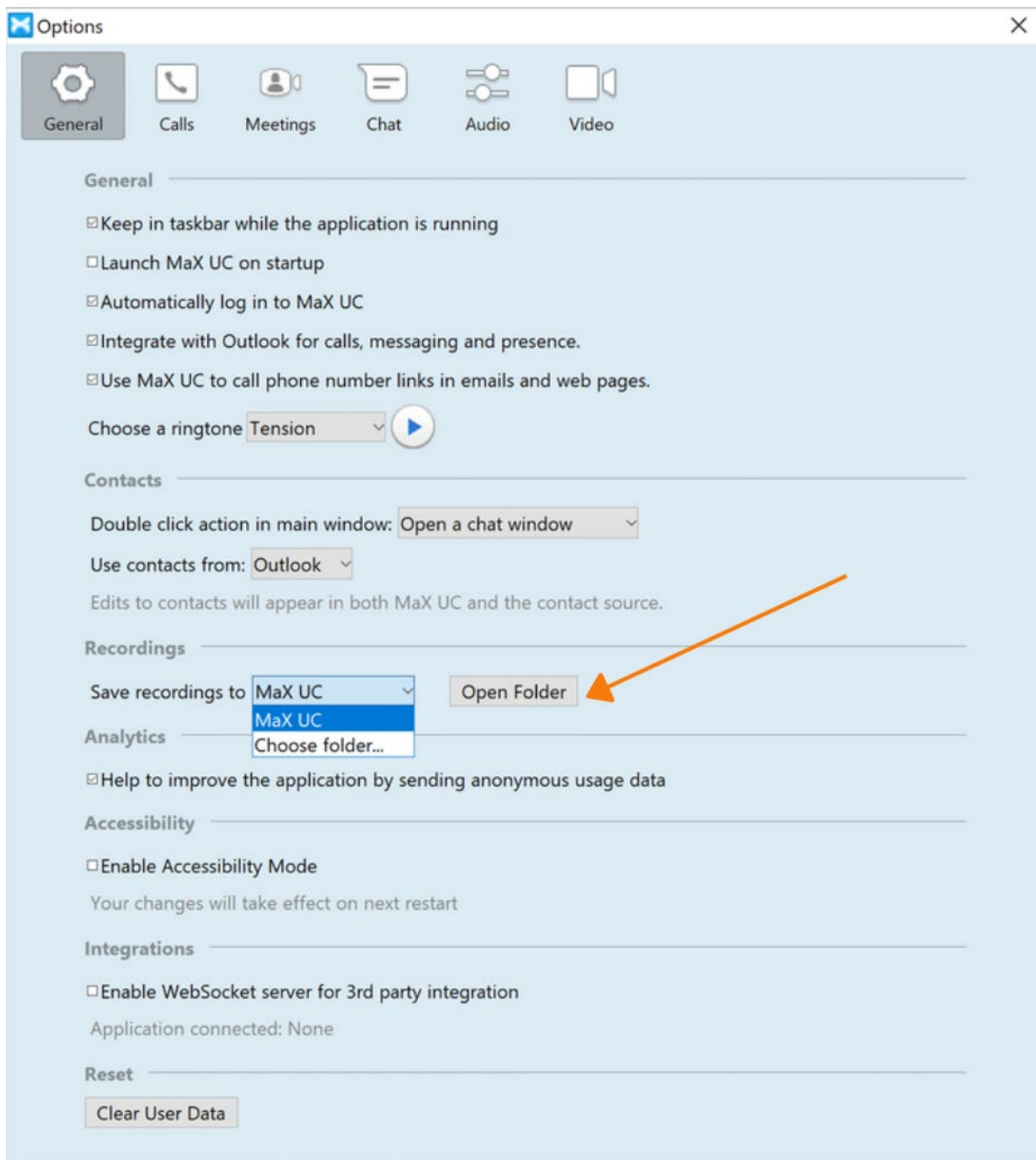
1. Click on Record icon  during the call. The icon turns red once the recording begins.



2. Once the call is completed a notification bar with the recording location pops up on right hand bottom corner. Recording files are saved as .wav



3. By default all recordings are stored under MaX UC's Communicator > Call Recordings.
- ◆ To open default location open MaX UC's Desktop, click on Tools > Options > General > Open Folder
 - ◆ To change default location open MaX UC's Desktop, click on Tools > Options > General > Choose Folder



EMERGENCY CALLS

MaX UC lets you make calls from anywhere on the most convenient device releasing you from a specific location. However, if you place a 911 call from MaX UC, the 911 operator may not be able to identify your location and assistance may be delayed.

PRIVACY AND SECURITY

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

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

MORE QUESTIONS?

If you have any additional questions about MaX UC Desktop, call Customer Support at:

855.216.4334

support@momentumtelecom.com

You can access more user guides here:

<https://momentumtelecom.com/mu>