MaX UC Desktop User Guide

Download MaX UC for Desktop:

- Go to: http://ctcbusiness.net/commportal

- Number: End user's 10-digit phone number

- Password: Given to you by CTC Technician. If you do not know this password, please call 208- 229-9000.
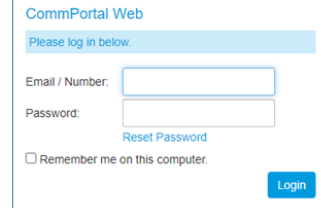
Password Requirements:

- 8-20 characters and must include 1 number, 1 letter, and one special character

- Cannot contain the same character more than 2x in a row

- Cannot contain more than 2 characters in a sequence (e.g, 1234, or abcd)

- Cannot contain 4 or more digits of the phone number (e.g., if phone number ends in 7900, the password cannot contain "7900" anywhere in the password)

o Enter the password and click [Login]

- Click [Downloads] at the bottom of the screen

- Click [View Apps]

- Select the download to match the computer's operating system [Windows 7/ Windows 8/ Windows 10] or [Mac OS X (10.12+)]

- Click [Run] to download and open the MaX UC Setup Wizard

- Complete the Setup Wizard screens by clicking [Next] on each screen

- Click [Install] to complete the installation and add the MaX UC icon the desktop

- Click [Finish] to complete the wizard and launch MaX UC

- Select [Log in Manually]

- Select [Syringa Networks] as the service provider and click [OK]

- Enter the same 10-digit phone number and password you used on the Commportal, then click [Log In]

- Click [Accept] to accept the licensing agreement

- MaX UC Desktop has been successfully installed
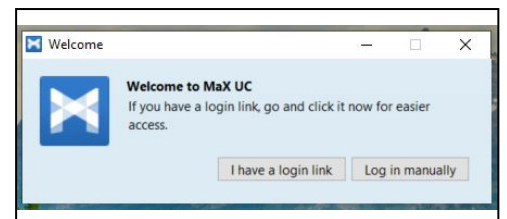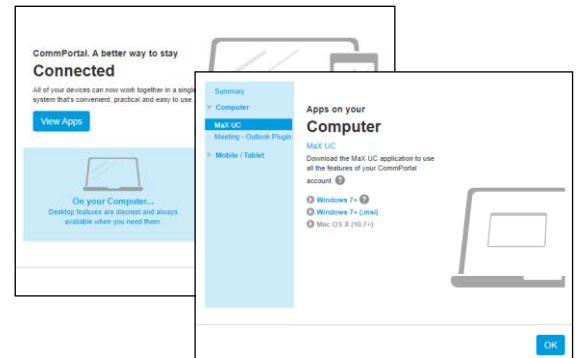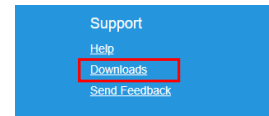
Menu Options:

- Click [File] for:
  - Change Password
  - Mute Notifications: calls and chat messages
  - Add Contact
  - New Group Chat
  - Logout
  - Quit: close
- Click [Tools] for:
  - Options: manage preferences for calls, chats, and contacts – see
    Options and Settings section below
  - Groups: view Multi Line Hunt Groups and Call Pickup Groups you are a member of
  - Apps: download MaX UC
  - View Account: manage account settings for calls, messages, notifications, or group
    mailboxes
- Click [Help] for:
  - Check for Updates: download updated versions of MaX UC
  - Help: open the online MaX UC user guide
  - Send Feedback: report bugs/errors to MaX UC developer
  - About: view MaX UC software version
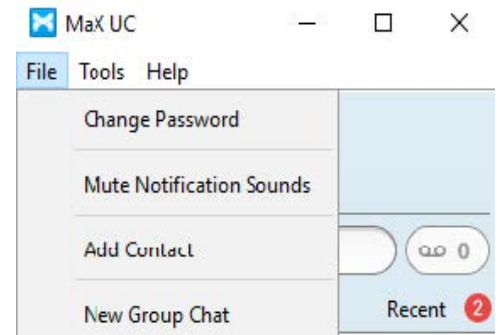
Contact Tabs:

- Favorites Tab: View contacts that have been designated as favorites
    - Right-click a contact and select "Add to Favorites" or "Remove from Favorites"
    - Favorite contacts are denoted with the ⭐

- Contacts Tab: View all CTC Phone System Users in your company

    - Shows presence of Users with desk phones as "On the Phone" or "Deskphone" (when end user is not on the phone)

    - Shows presence of other MaX UC users as "Online", "Offline", "Away", or "Busy"

    - Mouse over a contact to display contact options:
        - Double-click the contact to place a call to the contact's primary number

        - Click [📞] [Call] to select the number to call when the contact has multiple numbers
        - Click [💬] [Chat] to send a chat message to the contact

- Recent Tab: View All (calls and chats), Calls (calls only), and Chats
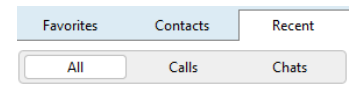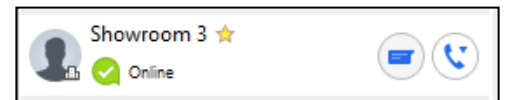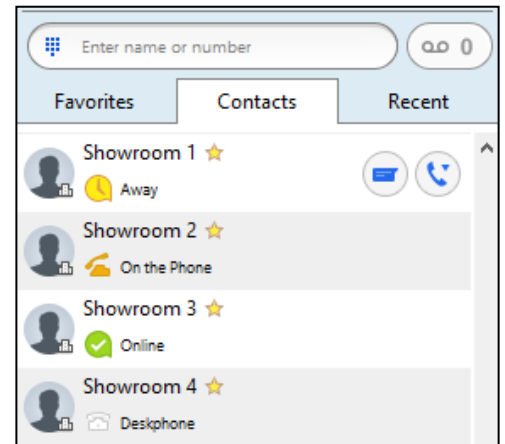
Make a Phone Call:

- There are several ways to place a call:

  o Use the Dial Pad: click on the dial pad icon [⊞] and click the number

  keys to enter the phone number. To place the call, click the green

  [Call] button.

  o Use the Enter Name or Number field:

    ▪ Enter a name - matching entries from Contacts will appear.
      To place the call, click on the matching entry, click the [Call]
      button, or press [Enter] on the computer keyboard.

    ▪ Enter a 10-digit phone number. To place the call, click the
      green [Call] button or press [Enter] on the computer
      keyboard.
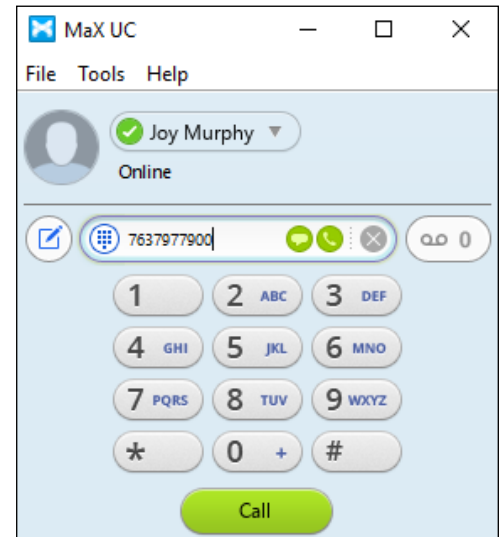
Note: MaX UC should not be used for emergency (911) calling. MaX UC will complete the 911 call; however, the call will show the address of the business office where the CTC Phone System is installed.

Receive a Phone Call:

- When a call is being received, a popup displays the name of the caller

  o Click the green [Accept] button to answer the call; or,

  o Click the red [Reject] button to decline the call.

    ▪ Declined calls are routed according to the line's Call Manager settings, most commonly to the
      lines voicemail box on the CTC Phone System.

Pull Call using MaX UC Desktop

- To pull an active call from your desk phone/mobile device to
  MaX UC Desktop:

  o Click on the "Call Available to Pull" message that is

    displayed at the bottom of the window

  o Click [Pull Call] to pull the call to MaX UC Desktop

Note: When Direct Calling setting is OFF, "Call me on" setting
in Tools→Options→Calls must be set to "Account Phone".
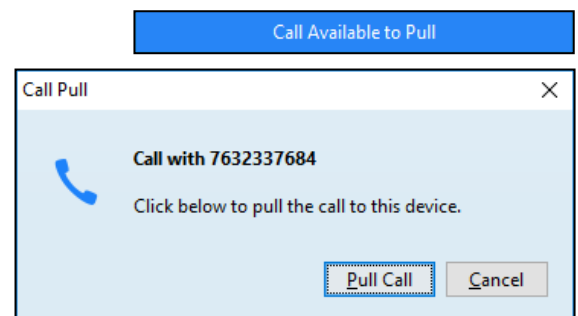
In-Call Options:

- A popup screen displays the Caller ID name and the duration of the call

- Click the buttons on the popup screen to:

    ▎▎ Place Call on Hold

    🎤 Adjust Microphone Volume

    🎧 Adjust Headset Volume

    ⚏ Open Dial Pad

    📲 Push Call to Another Device -all configured devices/phones ring and the call is transferred to the first- answered device

    REC Record Call (recorded calls are saved to the hard drive location specified in Tools → Options)

    📞 Park Call

    + Add Participant (conference call)

    🖥 Web App Integration (optional)

    ➡ Unattended/Blind Transfer the call

    -or-

    Warm Transfer (announce the call before transferring) when using MaX UC Desktop in softphone mode:

    - o Place a call to the party that you would like to transfer the call to (the first caller will be placed on hold and a second call window will appear)

    - o When the party answers, announce the call you will be transferring

    - o Click ➡ [Transfer] and select the first caller's name/number to complete the transfer

    📞 Hang Up
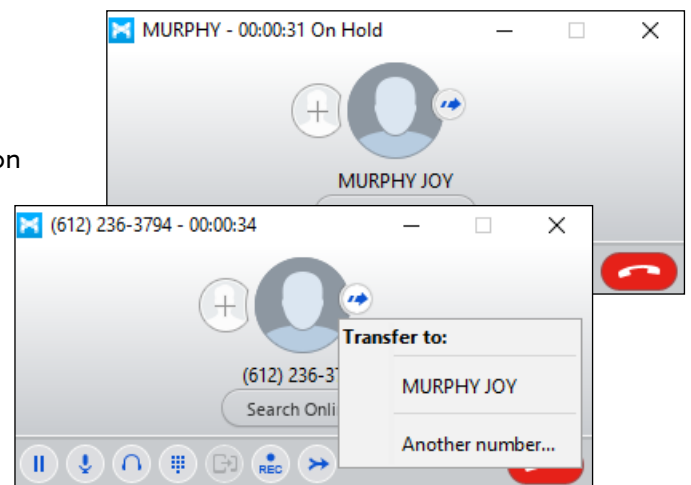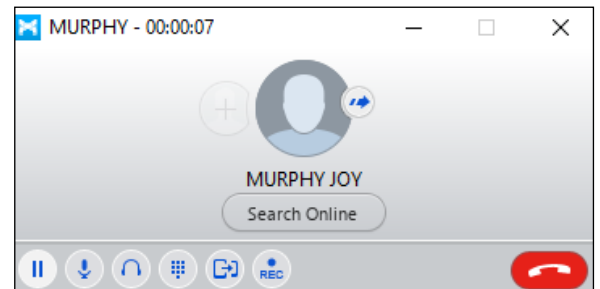
Messages:

Voice Mails:

- The [Messages] icon displays the number of new voice mail messages

- Click [Messages] to open the Messages screen

- Click the [Messages] tab to view a list of voice mail messages:

  o To play a message, click ▷ [Play]

  o To delete a message, click ✖ [Delete]
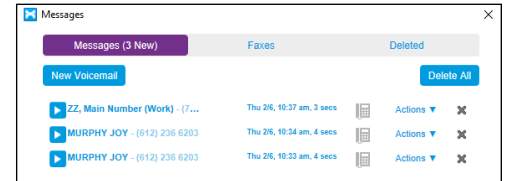
Send and Receive Chat Messages:

Hover over a Contact and click the ▬ [Chat] icon or enter a 10-digit phone number in

- Send Chat field:

  o Enter text in the field. Add emojis by clicking ☺ [Insert Smiley] the icon.

  o Press [Enter] on the computer keyboard to send the message.

- Reply messages will appear in the window above.

- Options at the top of the Chat window:

  o Click 📎 [Attachment] to select a file to attach and send to the contact

  o Click � [History] to view the Chat History with this contact

  o Click 📞 [Call] to call the contact

- To resume a previous chat, click on [Recent], then click on [Chats]
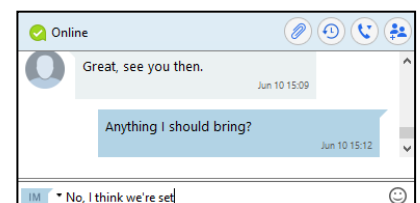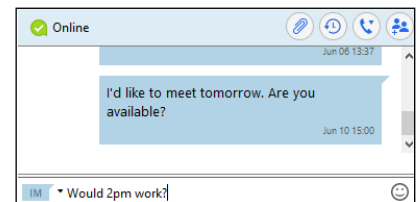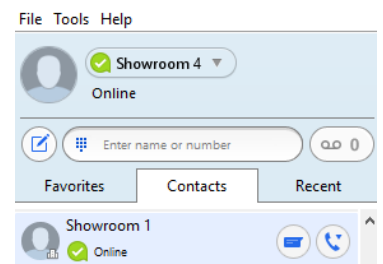
Options and Settings:

Click on [Tools] and select [Options] to access the following settings:

- General – general settings, contacts, recordings, analytics, and accessibility options
- Calls – call settings, ringtone and direct calling options:
  - If you are using a desk phone - turn the **Direct Calling** feature <u>off</u> for a better experience. Incoming calls will not ring MaX UC Desktop and outgoing calls will be made using click-to-dial.
  - If you are not using a desk phone - turn the **Direct Calling** feature <u>on</u> to make and receive calls from MaX UC Desktop directly (this is softphone mode)
- Chat – chat settings, display, notifications, and status options
- Audio – audio settings, microphone, in-call audio, notifications, and headset button options
- Video - select camera for video calls

<u>For additional training and support:</u>
- Call CTC Business at 208-229-9000

MaX UC Mobile User Guide

You can use your CTC phone service to make or receive calls from your desk phone, your PC or MAC, and your mobile devices.

For this to work on your mobile or tablet, you need to install the MaX UC Mobile app. This guide helps you to do that.

ENSURE YOUR DEVICE IS COMPATIBLE

MaX UC Mobile works on:

- Android phones and tablets using version 6.0 or later.
- iOS devices running iOS 11.0 or later.

Video calling only works on devices that have a front-facing camera.

FIND YOUR PASSWORD

You will need your CTC phone number and password to start using MaX UC Mobile. If you don't have this information, call us at (208) 229-9000. You are prompted to change the password as part of completing the login process.

DOWNLOAD AND INSTALL THE APP

Search "MaX UC Mobile" app in the App Store or Google Play. Tap Install to download the app to your device. Check the Terms & Conditions and tap Accept & Continue.

Tap [Open] on the app (if prompted, select Syringa Networks as your Carrier). Then if not already present, enter your CTC Phone Number and Password. Tap Log in.

If you are having trouble logging in tap the eye symbol to show your password and check that there are no errors.

If you want to have the ability to switch calls to your own cellular network (for example, if you move to an area with poor Wi-Fi connection during a call made on MaX UC Mobile) enter your own mobile phone number and tap [Continue].

EXPLORING MAX UC MOBILE

MaX UC Mobile is like having your desk phone on your mobile. 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.

You can also use MaX UC Mobile to send messages to other people in your corporate directory who are using MaX UC (on any device).
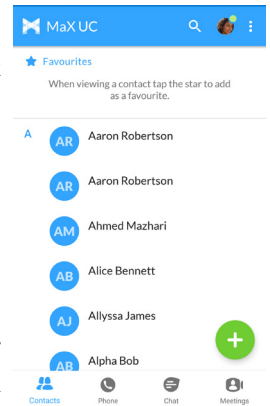
MaX UC Mobile uses the Wi-Fi, broadband, or mobile data services available, so you can make and receive calls without using your mobile minutes.

You can access the MaX UC Mobile features using the Contacts, Phone, Chat and Meetings tabs at the bottom of the screen.

CONTACTS TAB

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

- contacts that you type into MaX UC Mobile
- contacts stored on your mobile device
- contacts in CommPortal contacts
- contacts in your corporate directory.

The contact's status appears in a speech bubble next to their profile picture.

Tap on a contact to access Call, Chat and Meeting options. Tap on the Plus icon to add new contacts.
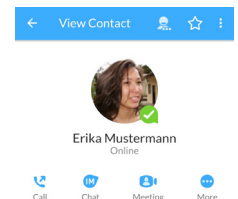
PHONE TAB 📞

Tap on the Phone tab to make a call, view your Call History and listen to Voicemail.

To make a call, tap on a contact and select the number to call or tap on the Dialer icon ⬚ and enter the number.

If the person you are calling has caller ID, they will see your individual business phone number.

The Voicemail tab indicates the number of messages received.

Tap on the Play icon to listen to a voicemail.

Tap on the Voicemail entry to see Call, Chat, Meetings and More options.

Tap More to access View contact, Mark as Unheard or Delete Message.

If you have a fax message, the Faxes tab appears; you can tap on it to see the fax.

CHAT TAB 💬

Tap the Chat tab to use Instant Messaging. Enter your Chat Address and Password and tap Sign in.

Tap on a contact to continue a previous conversation or click on the green [plus] icon to create a new message
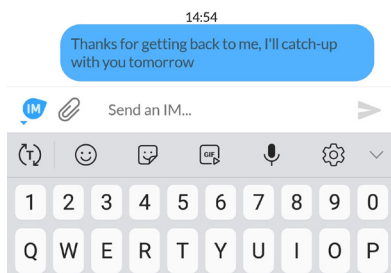
From within the chat window, you can start or continue a conversation, send files, call a contact, or add one or more participants to a conversation. Your Instant Messages automatically sync to all your MaX UC client devices.

MEETINGS TAB 📹

Select the Meetings tab to Create or Schedule a Meeting, Join a Meeting or view Upcoming Meetings.

RECEIVING CALLS

When someone calls your business number, MaX UC Mobile offers the choice to accept or reject the call.

DURING THE CALL

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

🎤 Mute your microphone.

⬚ Access the Keypad.

🔊 Turn on the Speaker.

⏸ Put the call on Hold.

⭐ Invite a Favourites contact to join the call.

📞 Add/Transfer the call allows you to make a second call and add the contact into a 3-way call or transfer the call.

👥 Uplift the call to a Meeting.

••• Access More options (send video or switch the call to another device).

You may receive another call while you are already on a call. MaX UC Mobile gives you the option to:
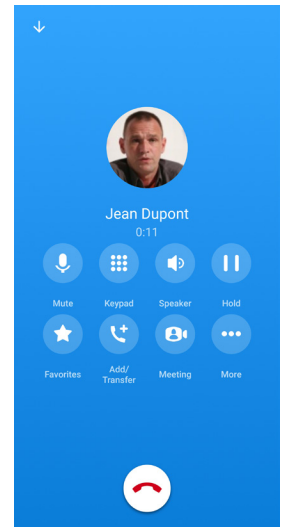
– Hold the existing call and answer the new call.
– End the existing call and answer the new call.
– Ignore the new call.

TRANSFER THE CALL

Tap Add/Transfer to send the call to another number. You can select a contact or type in a number to transfer the call to. You can also transfer the call to another one of your MaX UC client devices, without hanging up!

SWITCH THE CALL TO ANOTHER DEVICE

If the call has poor audio due to an unreliable Wi-Fi or mobile data service connection, tap More then Switch and select This device (cellular) to move the call to your regular cell phone. Remember the call will now use your mobile minutes.

Alternatively, you can push the call to another of your MaX UC client devices, such as your desktop or your iPad. Tap More and then Switch and select Another device to push the call to whichever device is most convenient.

CALL PULL

You can pull calls from your other devices onto your mobile. If a call exists that can be pulled, MaX UC Mobile displays a Call Available to Pull option. Tap this option and follow the on-screen prompts to pull the call onto your mobile.

VIDEO CALLING

If the person you are talking to is also using MaX UC Mobile and your phone has a front-facing camera, you can add video to your call. Tap More then Video to send video. The other person receives a prompt inviting them to switch on their video. Tap on the Video icon at any time to turn off your video feed.

FAVORITES

Tap the Star icon on a contact's directory entry to add the contact to Favourites. Favourite contacts appear in a banner at the top of the Contacts tab.
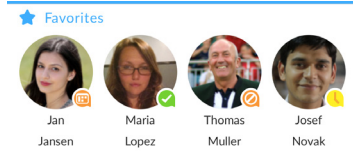
During a call, click on the Favourites icon to view your favourite contacts. Drag and drop a contact into the call window to setup a new call. When the contact answers, you can merge them into the initial call to create a 3-way call.
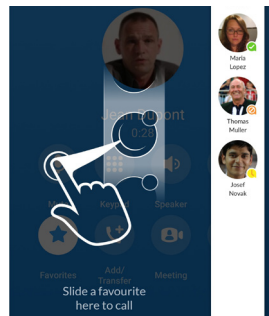
CALL NOTIFICATION

On Android devices, when you minimize the call window, the notification banner at the top of the screen shows the active call.
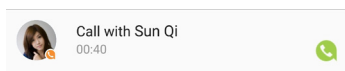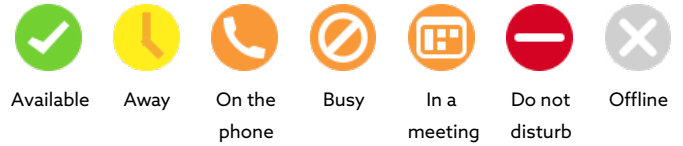
On iOS devices, the call notification banner displays at the bottom of the Phone tab.

PRESENCE

Whenever one of your contacts is signed in to their Chat account, MaX UC Mobile displays their presence information on the Contacts, Phone, and Chat tabs.

Available | Away | On the phone | Busy | In a meeting | Do not disturb | Offline

CALL MANAGER

You can tell MaX UC Mobile how to handle your incoming calls. Tap the Call Manager option in the Profile & Settings window and select Available, Do not disturb, or Forward all calls.
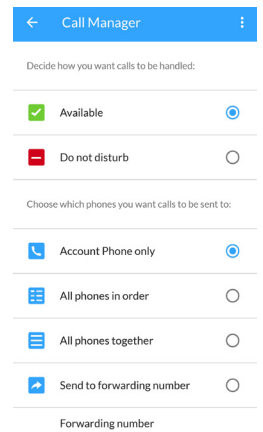
If you select Do Not Disturb, callers hear a recorded voice announcement saying that you are unavailable and are then connected to your voicemail. None of your devices will ring until you turn off Do Not Disturb, so be sure to use it carefully!

Select Forward all calls and, in the Forwarding number box, enter the number you want to forward all calls to.

Note that when you change your Call Manager settings, the change applies on all of your MaX UC Client devices.

EMERGENCY CALLS

MaX UC Mobile lets you make calls from anywhere on the most convenient device. If you place an emergency call from MaX UC Mobile, the operator may not be able to identify where you are calling from.

PROFILE & SETTINGS

Click on your avatar in the top-right to access Call, Chat, Contact, and Messaging settings, and additional setup options. You can also configure your profile, send error reports and access Call Manager in the Profile & Settings window.

MORE QUESTIONS?

If you have any additional questions about MaX UC Mobile, call us at 208-229-9000 or email businesssupport@ctctele.com