



MaX UC Desktop

User Guide

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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 IS COMPATIBLE

MaX UC for Desktop works on PCs running Windows 7, 8 or 10. It also runs on Macs that have 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 Comm Portal phone number and password to start using MaX UC for Desktop. If you do not have this information, contact administrator or call us on **800-860-2934**.

DOWNLOAD AND INSTALL THE SOFTWARE

Download MaX UC for Desktop from: **<https://my.uc-view.com>**

When prompted, save the file. Find the file in your downloads folder, open it, and follow the on-screen instructions to install the software.

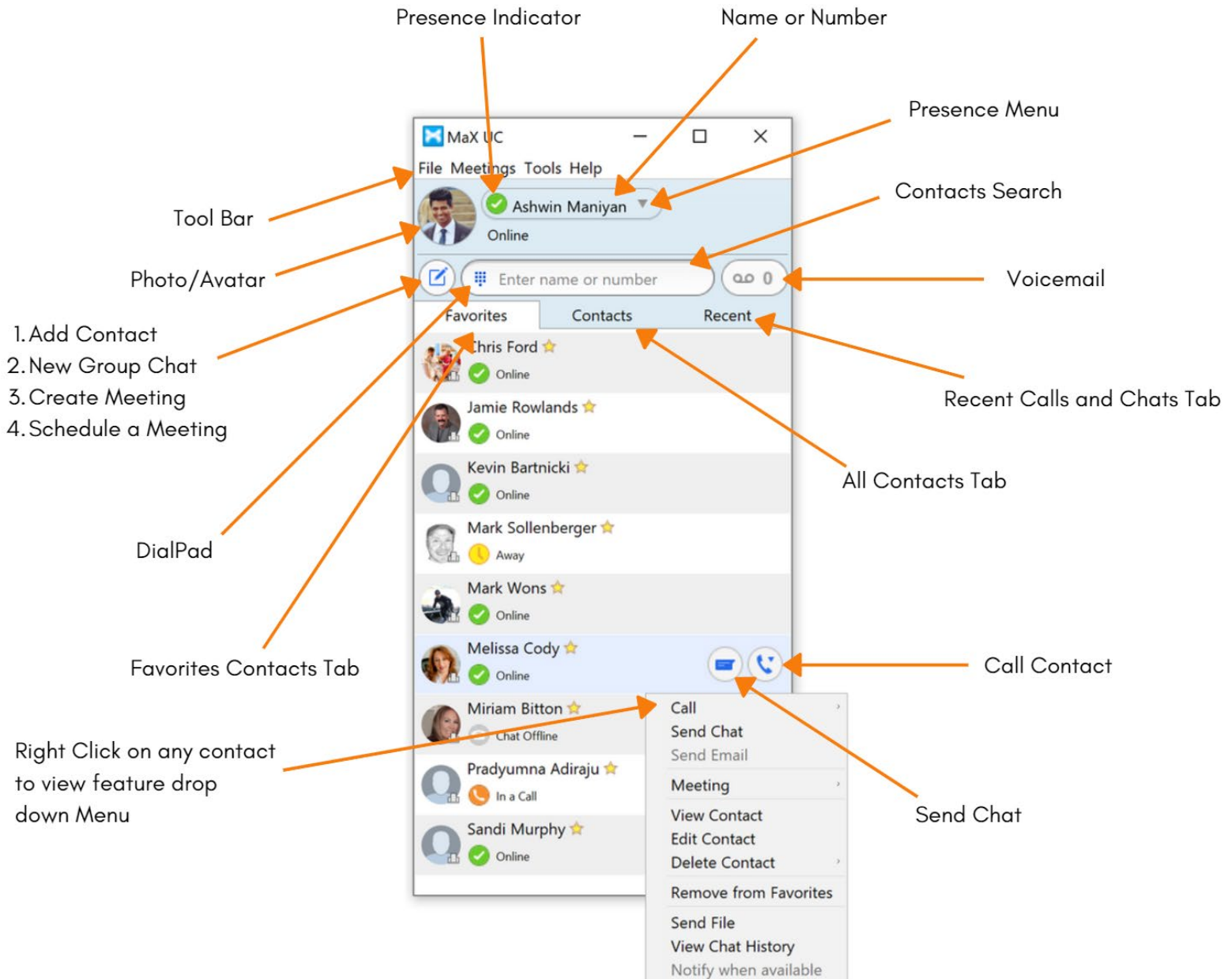
Click to download : **MaX UC Desktop Installation Guide**

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 to 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.

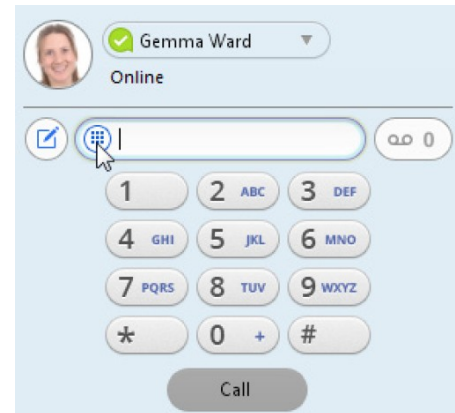


MAKING CALLS

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.

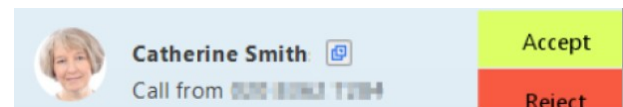
If the person you are calling has caller ID, they will see your individual Company phone number.



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.

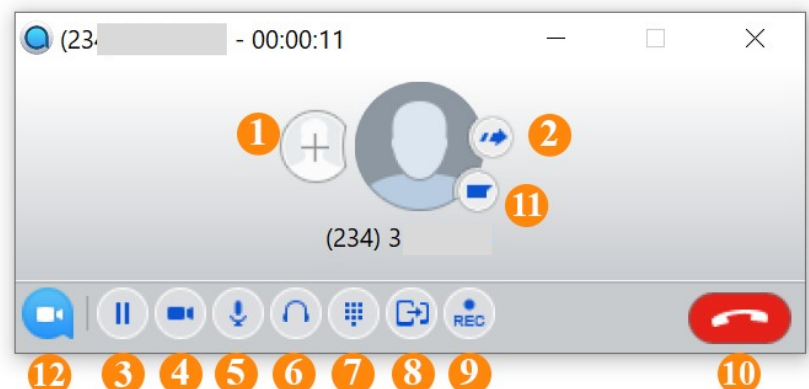
Depending on the other services you have from Company, you may see the incoming call on your desk phone, on your mobile phone, or on a tablet device. You can answer the call on whichever device is most convenient for you.



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 an UC MaX Meeting.

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.

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.

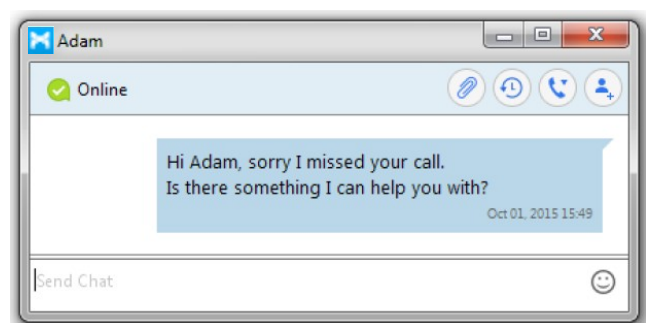
SEND THE CALL TO SOMEONE ELSE

Use the CallTransfer 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

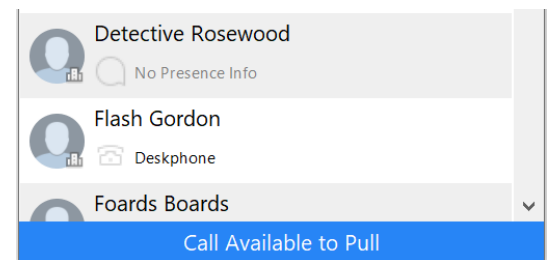
If you have MaX UC with Instant Messaging, click on a contact's Chat icon to send them an instant message. From within the chat window, you can send files, view your chat history with the contact, call the contact, and add one or more participants to the conversation.



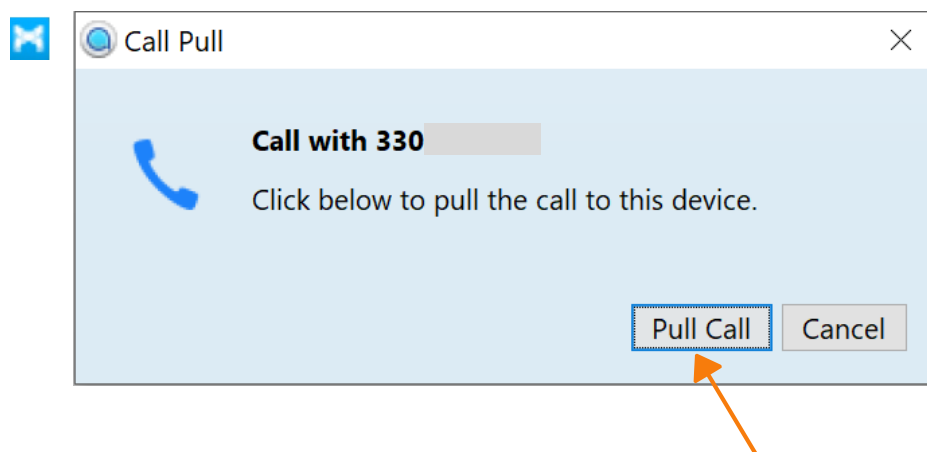
CALL PULL

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.

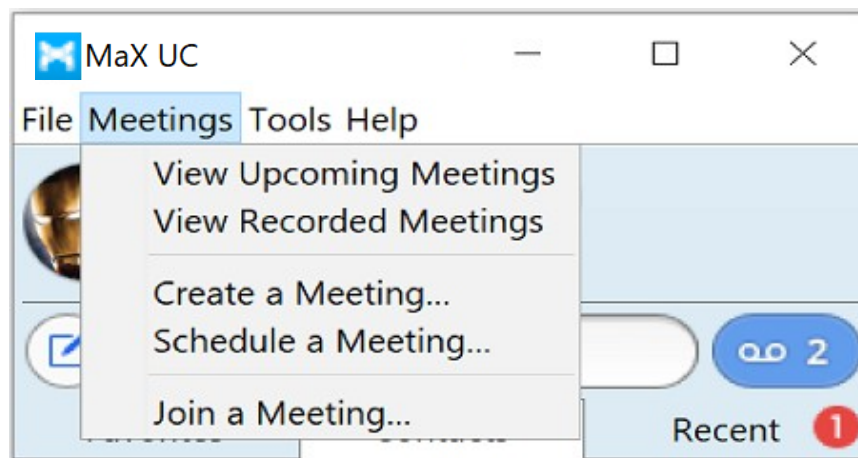


Click on 'Call Available to Pull' and you will see a new pop up as shown below. Please click on 'Pull Call' and call will now be active on your MaX UC's desktop.



MEETINGS (Availability based on license 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.






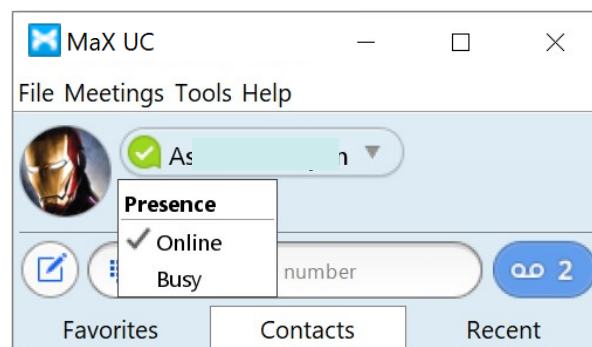
REJECT CALL WITH IM

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* .

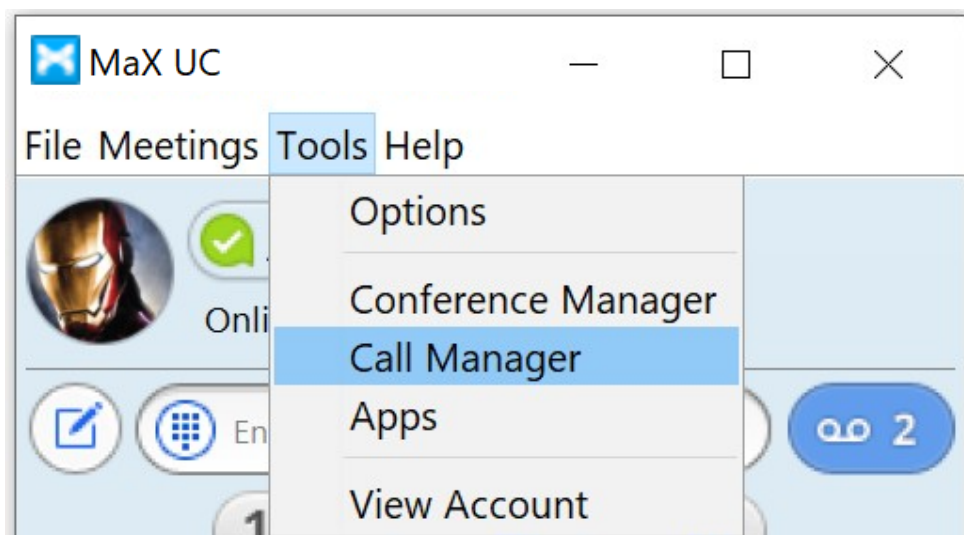
Your Presence information automatically shows when you are *Away* , *On the Phone* , or *In a Meeting*  (this references the information in your Outlook calendar).



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 unanswered call after seconds.

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.

2. To use 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:

Hint: Use the [Forwarding Destinations](#) tab to add numbers that you frequently forward calls to.

Ring destination for seconds during step 1

Permit forwarding? ☐ Yes ☒ No

Description:

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

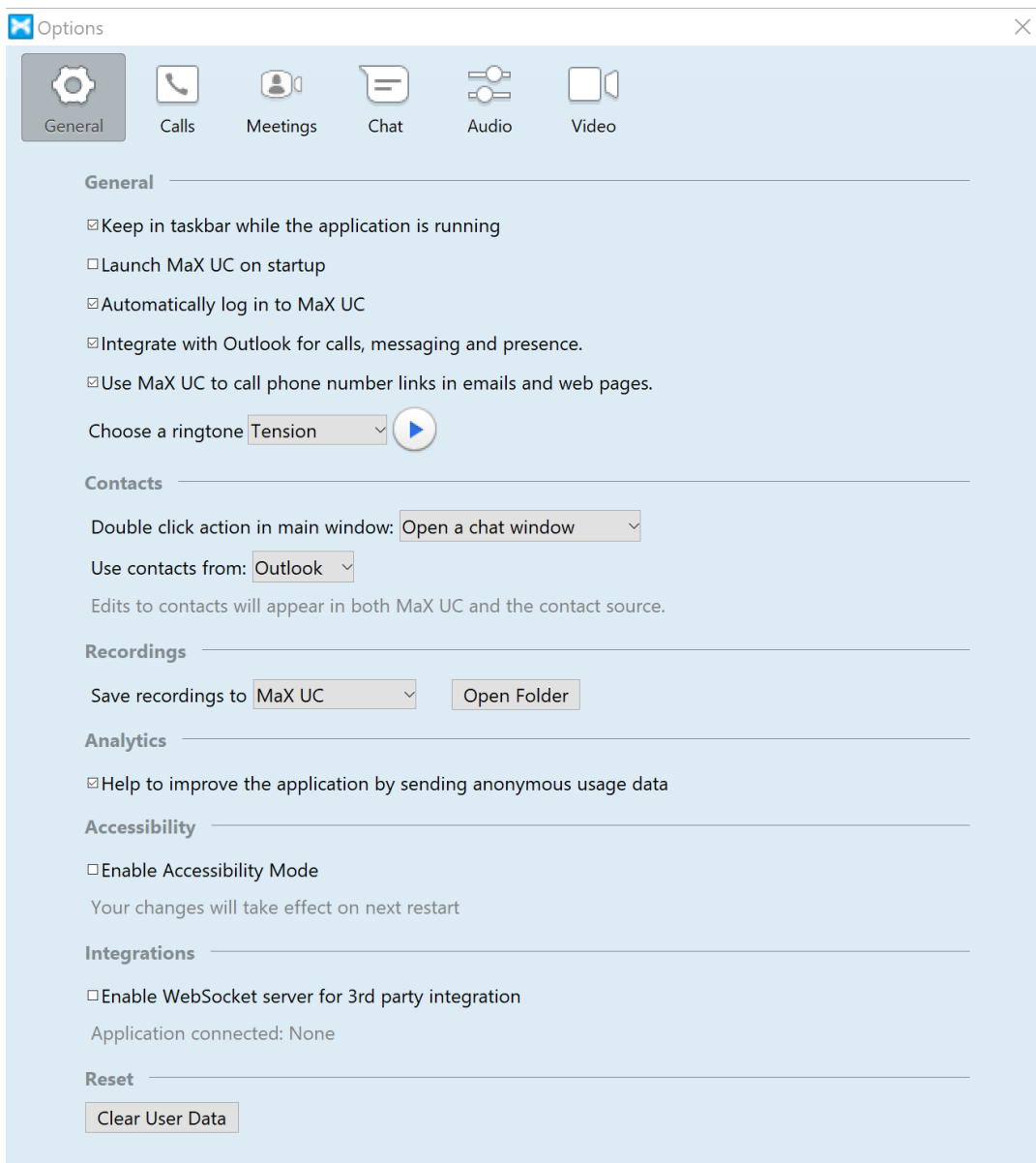
Click on the [Recent](#)  tab to see your call history. To view the chat history for a contact, click on the contact's Chat icon then click on the History icon.


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

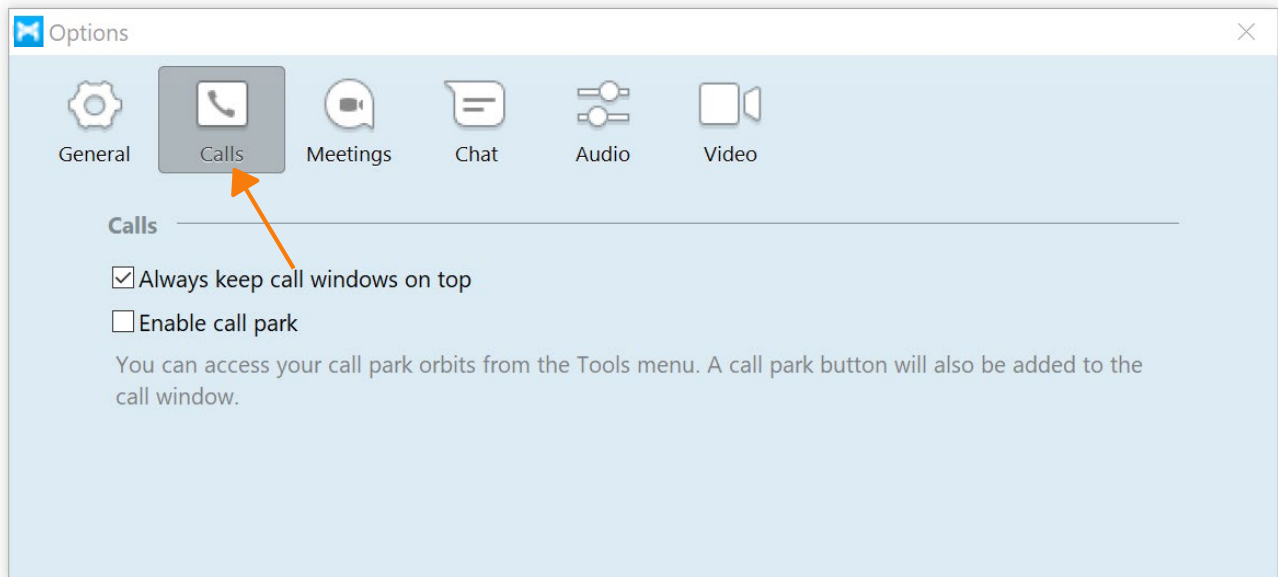
If you have a voice or video message, the Message button changes color and indicates the number of messages received. Click this  button to see a list of messages received, to see transcriptions of the messages into text (where available), or to listen to the messages.

OPTIONS MENU

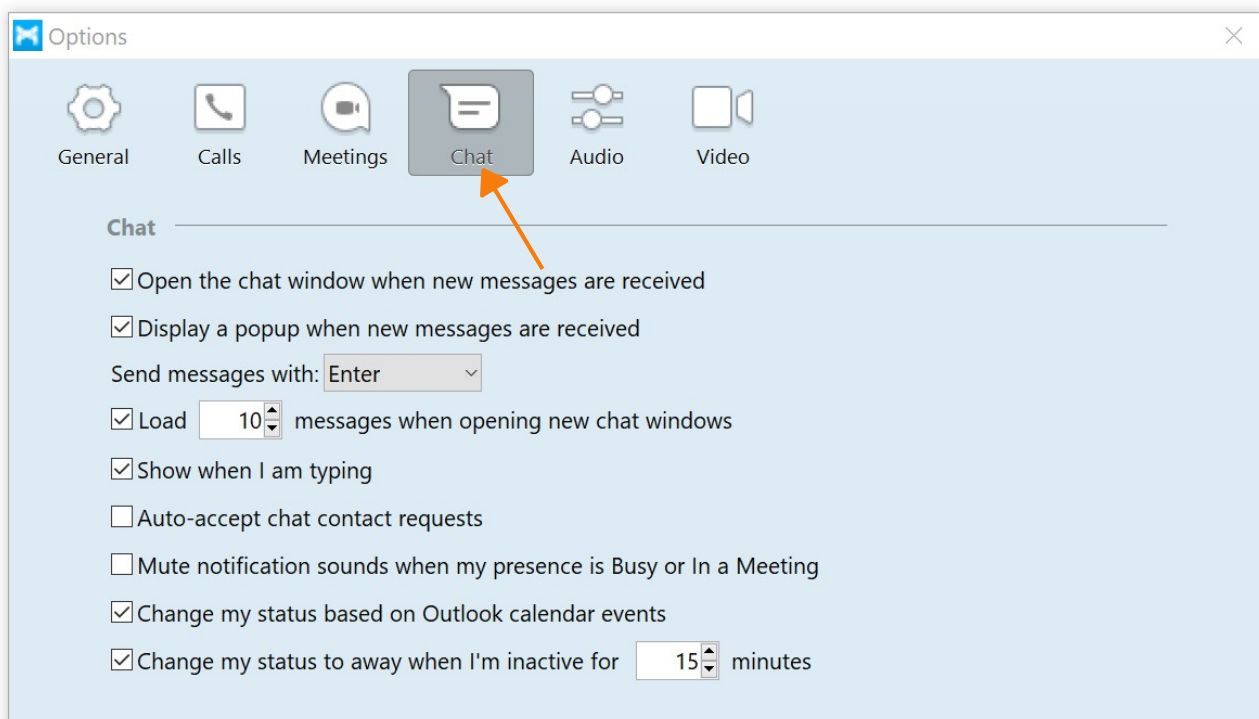
1. Click on the 'Tools' menu and select Options to access your general settings and test your Audio and Video devices.



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



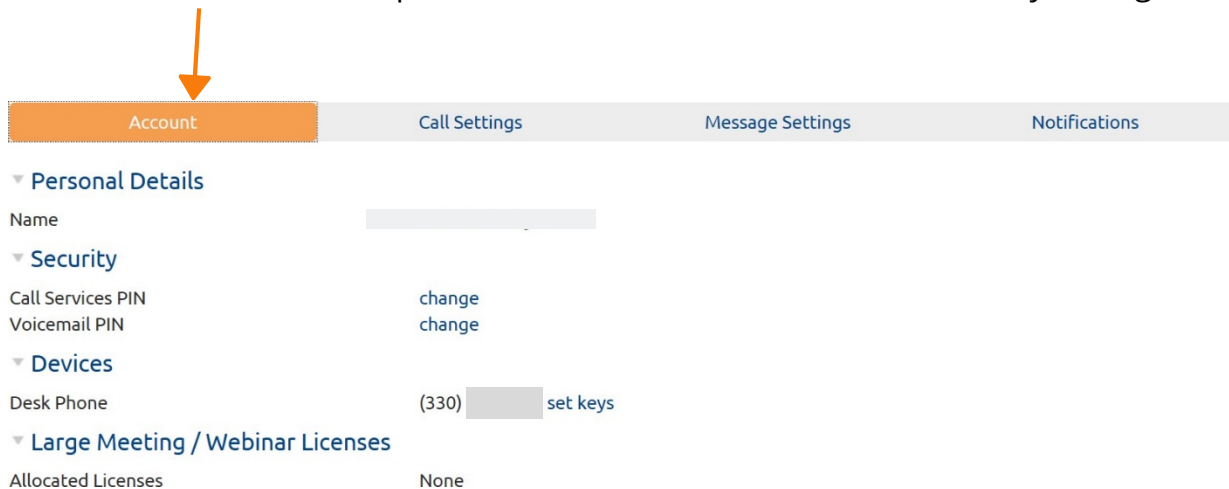
3. Click on 'Chat' to change MaX UC's desktop chat settings.



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.

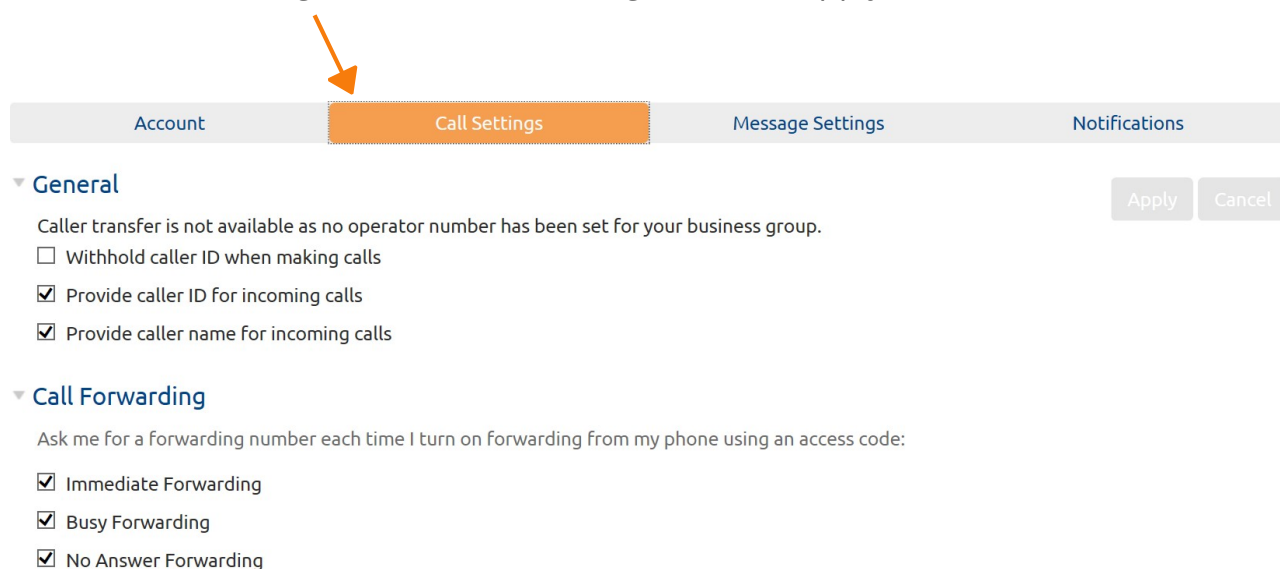
1. Click on 'Account' to view personal information and set soft /line keys using device manager



The screenshot shows the 'Account' settings page. At the top, there is a horizontal navigation bar with four tabs: 'Account' (highlighted in orange), 'Call Settings', 'Message Settings', and 'Notifications'. Below the tabs, the 'Account' section is expanded, showing several categories with expandable options:

- Personal Details**
 - Name: [text input field]
- Security**
 - Call Services PIN: [change]
 - Voicemail PIN: [change]
- Devices**
 - Desk Phone: (330) [text input field] [set keys]
- Large Meeting / Webinar Licenses**
 - Allocated Licenses: None

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

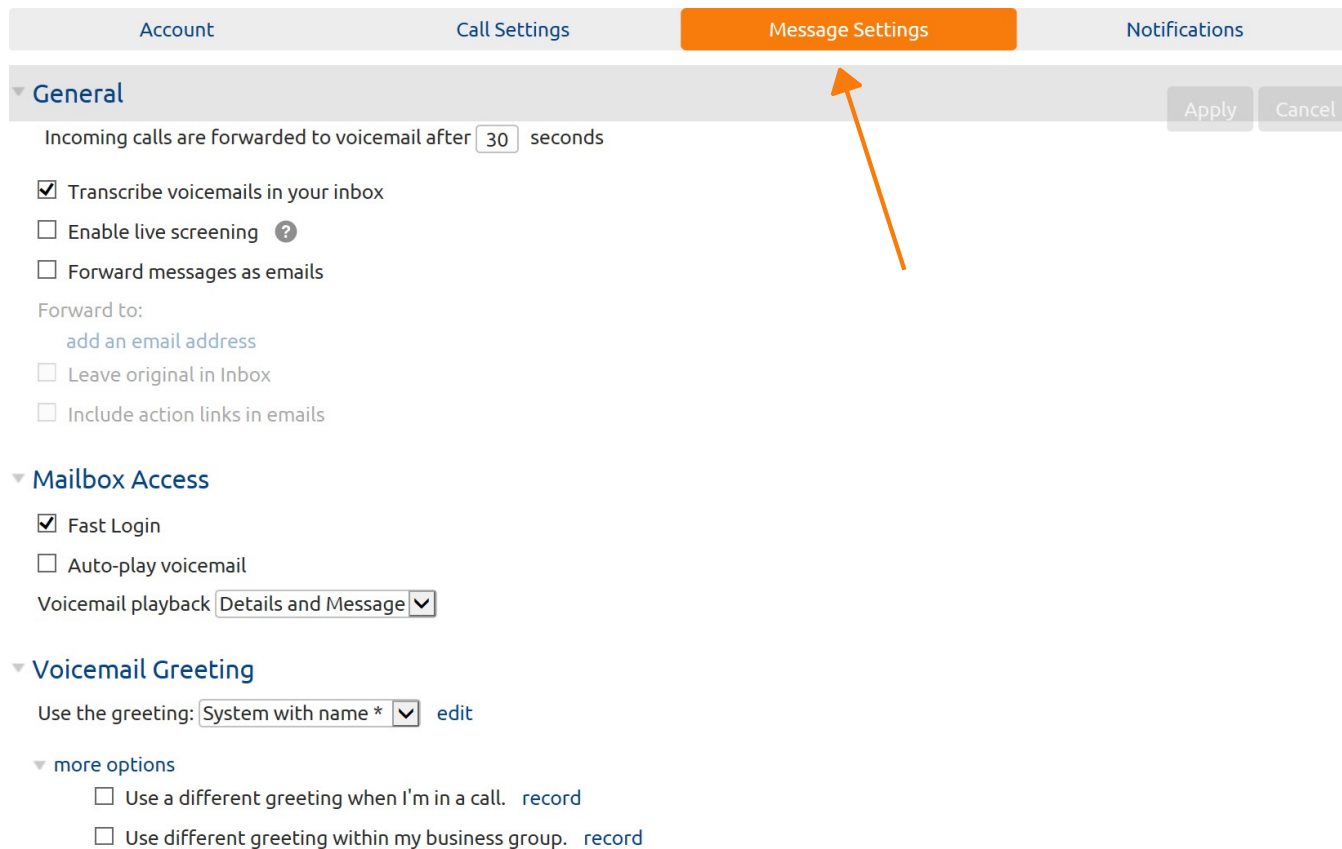


The screenshot shows the 'Call Settings' page. At the top, there is a horizontal navigation bar with four tabs: 'Account', 'Call Settings' (highlighted in orange), 'Message Settings', and 'Notifications'. Below the tabs, the 'Call Settings' section is expanded, showing several settings:

- 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
- 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

At the top right of the settings area, there are two buttons: 'Apply' and 'Cancel'.

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



The screenshot shows the 'Message Settings' tab selected in the top navigation bar. The 'General' section is expanded, showing options for incoming call forwarding, voicemail transcription, and live screening. The 'Mailbox Access' section shows 'Fast Login' enabled. The 'Voicemail Greeting' section shows the current greeting is 'System with name *'.

Account **Call Settings** **Message Settings** **Notifications**

General

Incoming calls are forwarded to voicemail after seconds

☒ Transcribe voicemails in your inbox

☐ Enable live screening ?

☐ Forward messages as emails

Forward to:

[add an email address](#)

☐ Leave original in Inbox

☐ Include action links in emails

Mailbox Access

☒ Fast Login

☐ Auto-play voicemail

Voicemail playback

Voicemail Greeting

Use the greeting: [edit](#)

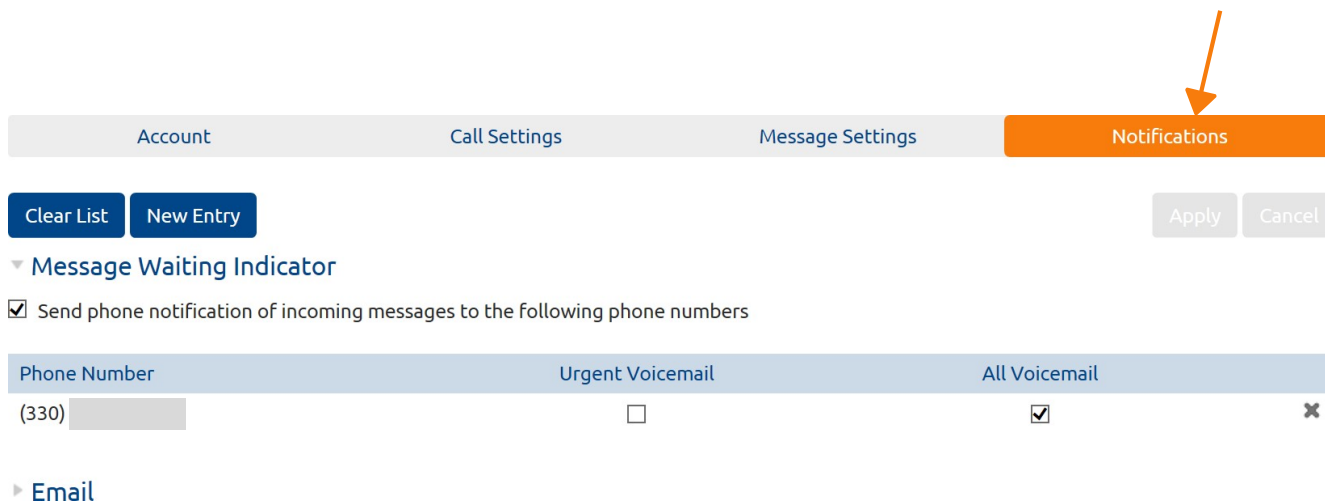
more options

☐ Use a different greeting when I'm in a call. [record](#)

☐ Use different greeting within my business group. [record](#)

[Apply](#) [Cancel](#)

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



The screenshot shows the 'Notifications' tab selected in the top navigation bar. The 'Message Waiting Indicator' section is expanded, showing options for sending phone notifications. A table lists phone numbers and their notification status for 'Urgent Voicemail' and 'All Voicemail'.

Account **Call Settings** **Message Settings** **Notifications**

[Clear List](#) [New Entry](#) [Apply](#) [Cancel](#)

Message Waiting Indicator


☒ Send phone notification of incoming messages to the following phone numbers

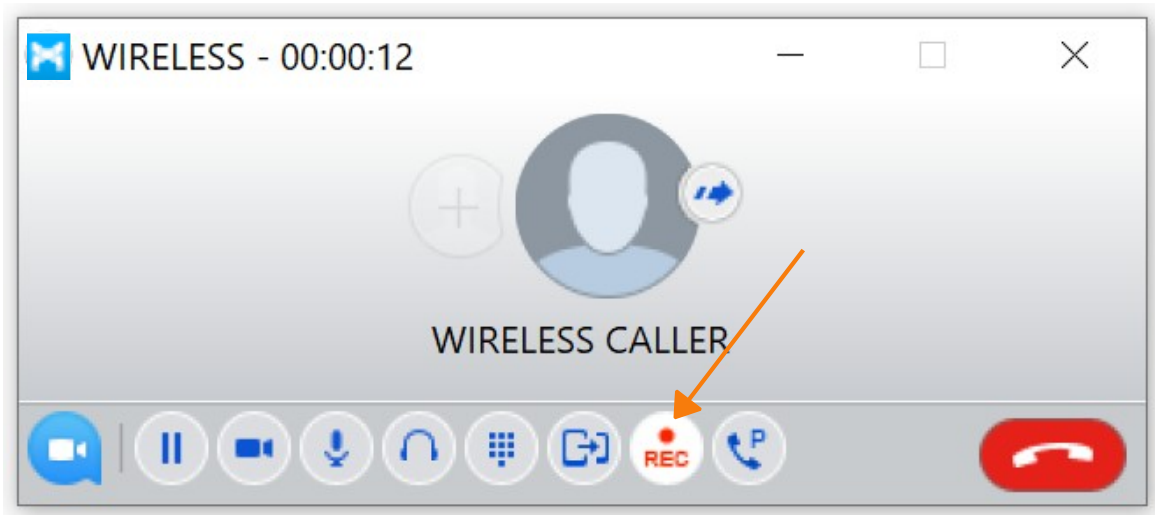
Phone Number	Urgent Voicemail	All Voicemail	
(330) <input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	x

Email

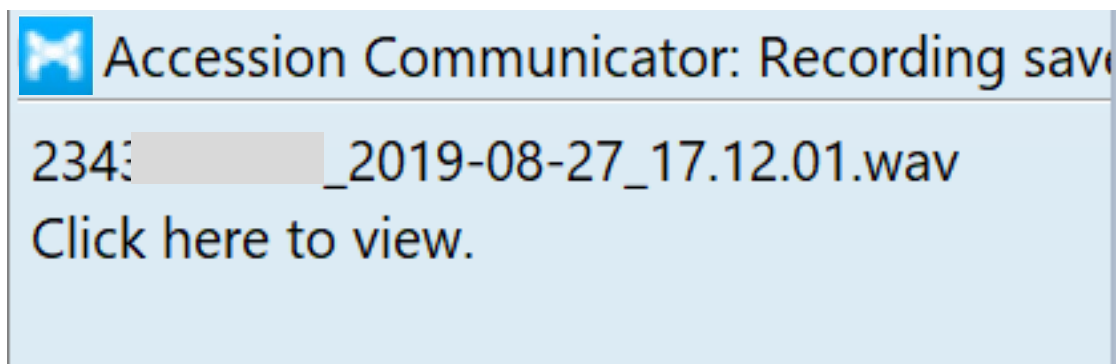
CALL RECORDING

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 :

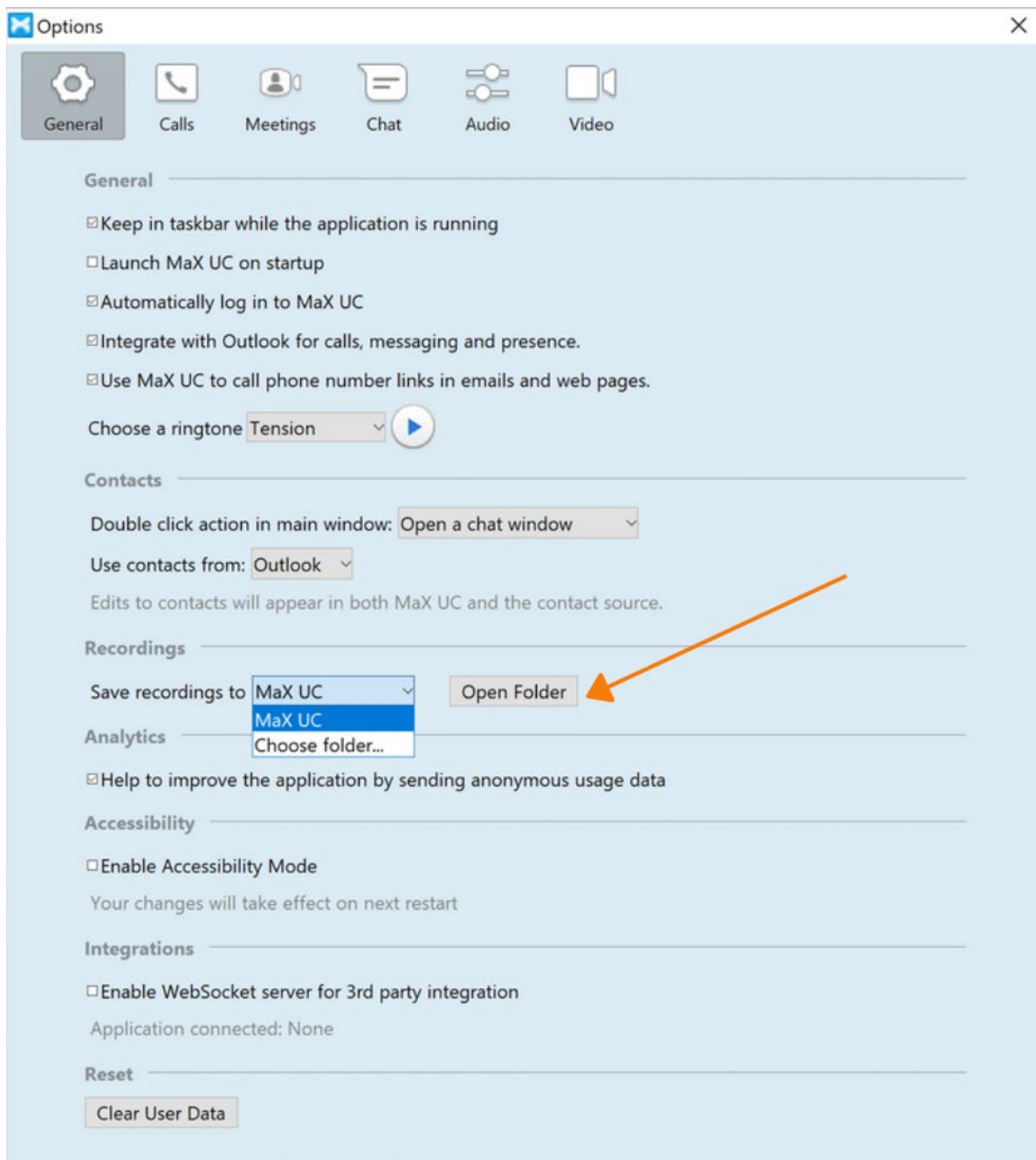
1. Click on Record icon  during the call. The icon turns red once the recording begins.



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. Therefore, if you place a 911 call from MaX UC, the 911 operator may not be able to identify where you are calling from.

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, call us at **800-860-2934** or email **businesscare@firstcomm.com**.

You can access all user guides here :

<https://www.firstcomm.com/products/cloud-ip-pbx/user-guides/>