

# MaX UC Desktop

## Quick Reference Guide



Take the functionality of our Hosted VoIP Phone service and use the MaX UC Desktop to make and receive calls through your PC. Use your computer's built-in microphone and speakers or add a headset for an even better experience.

Blue Stream Fiber CommPortal Access Number : ( \_\_\_\_ ) \_\_\_\_ - \_\_\_\_ Password : \_\_\_\_\_

### Download & Install MaX UC Desktop

1. Go online to <https://myfeatures.bluestreamfiber.com>
2. Log in to your **CommPortal** account with your **10-digit phone number and default password** (you can change the password at first login).
3. Click on the **Downloads** link. Then **View Apps** tab.
4. Select **MaX UC** from **Left Menu**. Click on the link for either **Windows** or **Apple/Mac** and **Download App**
5. When prompted, save the file. **Find the app in your downloads** folder, **open it**, and follow the on-screen instructions to install the software.

**Requirements:** MaX UC Desktop App works on PCs running Windows 8 and 10. It also runs on Macs running OS X 10.7 or later versions.

### Basic MaX UC Desktop Functions

#### First-Time Login

1. Open **MaX UC Desktop App** on your Computer
2. Choose **Log in Manually**
3. Choose your **Service Provider (Blue Stream Fiber)**
4. Enter your office **phone number** (direct line) and **default password**
5. Go to **File Menu** and select **Change Password** to create new password

#### Making Calls

##### Make a call by:

1. Entering the number on the keypad or
  2. Clicking on a contact name'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 office phone number.



#### Receiving Calls

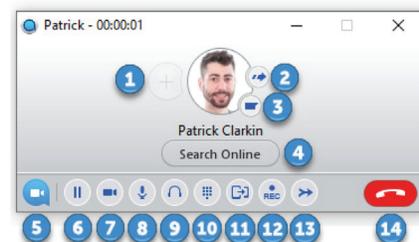
When someone calls your **office** number, you will see a pop-up window appear on your computer screen and hear a ringing tone through your speakers or headset. If caller's details are in your contacts list, the pop-up displays the caller's name. Click on **Accept** to answer the call. Click **Reject** to send call to voicemail or you can send an Instant Message to caller. You may see the incoming call on your desk phone, mobile phone, or on a tablet.



#### During Calls

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

- |                                      |                            |
|--------------------------------------|----------------------------|
| 1. Add a participant                 | 8. Mute the microphone     |
| 2. Transfer the call                 | 9. Adjust the volume       |
| 3. Send a chat message to the caller | 10. Access the keypad      |
| 4. Perform a CRM look-up             | 11. Switch to another call |
| 5. Uplift the call to a Meeting      | 12. Record the call        |
| 6. Put the call on hold              | 13. Merge calls            |
| 7. Send video                        | 14. End the call           |



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 click on the **Merge calls** icon to merge other callers into a single call.

# Basic MaX UC Desktop App Functions (Cont.)

## 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/Transfer A Call

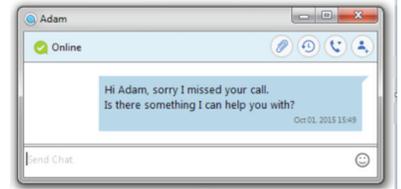
Use the **Call Transfer** icon to send any call to another number. A menu will pop-up allowing you to select a contact, or you can type in a new number to transfer the call to. You can also **transfer a call to another device** that has MaX UC Installed, without having to hang up.



## Chat Tab - Instant Messaging

Click on contact's **Chat** icon to send them an instant message. From within the Chat window, you can send a chat or files, view your chat history, call the contact, or add one or more participants to the conversation. To see your chat history, click on **Recent** tab, then click on a contact's **Chat** icon, then click on the **History**  icon.

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 in 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).

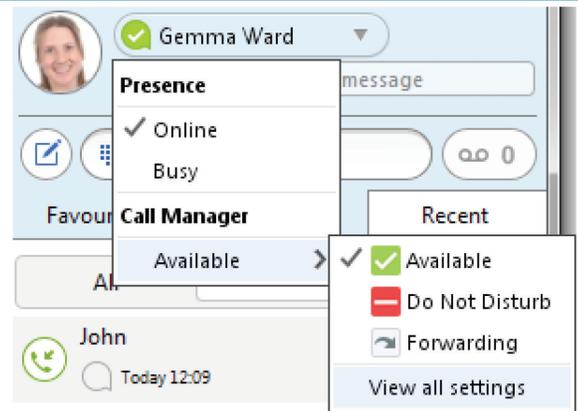
## Call Manager

You can tell MaX UC Desktop how to handle your incoming calls. You can specify how calls should be handled if they are from anonymous numbers, from VIPs, or from numbers on your Unwanted Callers list.

Open the **Call Manager Status** window, where you can set your call handling preferences. Click on the **Presence** selector, choose either:

-  **Do Not Disturb** **Do Not Disturb:** Callers hear a recorded voice announcement saying that you are unavailable and are then connected to your voice mail.
-  **Forwarding** **Forwarding:** Forward all incoming calls to another number. Enter the number you want to forward calls to when prompted.

\*Note: When you change Presence or Call Manager settings it applies to **all** your MaX UC devices.



## Your Contact List

MaX UC 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 Desktop.
- Contacts in CommPortal contacts.
- Contacts in the Outlook or Mac local address book stored locally on your computer.
- Contacts in your corporate directory.

If MaX UC Desktop is configured to automatically sync with Outlook, you can view and edit your Outlook contacts from within Max UC Desktop.

## Visual Voice Mail

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 and to listen to the messages.

## Emergency Calls (911)

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

## Tools

Click on the **Tools** menu and select **Options** to access your general settings and test your Audio and Video devices. You can also access other services such as CRM, conference, file-sharing and cloud-hosted services from the Tools menu.

## Privacy And Protection

When 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 Desktop; 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.