Smithville Cloud Voice

MaX UC Desktop Quick Start User Guide (CLEC)

Take your office line with you!

Install Smithville's Cloud Voice mobile service, *MaX UC Desktop*, on your personal device and start working from anywhere today.

MaX UC 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.

MaX UC Desktop uses the WiFi, broadband, or mobile data services available and connected to your computer to make calls.

Getting Started

MaX UC Desktop works on:
• Macs running OS 10.12 or later
• PCs running Windows 8 (desktop) and Windows 10

1. Log-in to *CommPortal* at commportal.smithville.com with your username and password.

2. Click on *View Account Settings*

3. Select *Support*

4. Select *Download*

5. Select *On your Computer*

6. Select the version you need Windows 7,8, or 10, or MAC OS X 10.7 or higher

7. Save the file

8. Open the file from your downloads tab and follow the installation steps. It is recommended to *Allow MaX UC to make changes to your computer*

9. When installation is complete click the *MaX UC* icon to open the app and select *Smithville*

10. Enter your *username* and *password* which is the same one you used for logging in to *CommPortal*

Navigating the Max UC software

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 phone number.

While in an existing call, you can make a second call using the main client rather than the active call window. This automatically puts the first call on hold. When the second call is active, you can click on the *Transfer Call* icon to show the held call as a transfer option.

Receiving Calls

When someone calls your number, a pop-up window will appear on your computer screen and you'll hear a ring 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 will display the caller's name.

Depending on the other services you have, you may see the incoming call on your desk phone, mobile phone, or tablet device. You can answer the call on whichever device you choose.

During the Call

During a call you can use the call window to:

1. Add a participant
2. Transfer
3. Put the call on hold
4. Mute your mic
5. Adjust the volume
6. Access the keypad
7. Switch to another device (Call Jump)
8. Record the call
9. Call park

You may receive a call while you are 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.

Call Manager

Call Manager allows you select how you receive calls. You can:

• Ring your phone

• Forward calls to another number

• Send calls to Voicemail

• Create rules

• Handle calls differently depending on time of day

To access Call Manager, select Call Manager from the Tools Menu. *Your window may vary from example below per your service selection.*
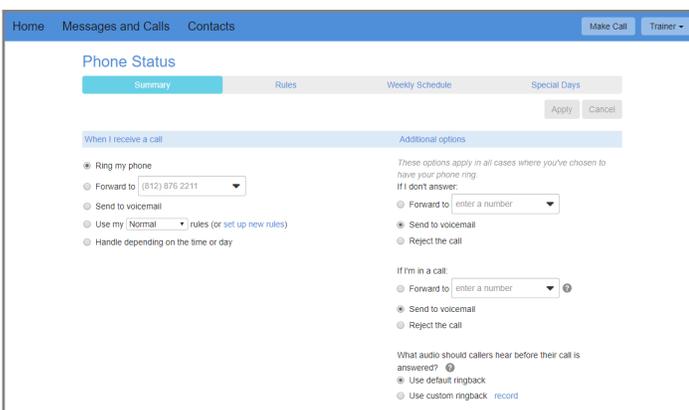
Your Contacts List

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 the Outlook or Mac local address book stored locally on your computer that have numbers associated with them.

• Contacts in *CommPortal* contacts.

• Contacts in your corporate directory.

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

Favorites

For quick access to frequently-called people, add the contact to your *Favorites* list. Right-click on the desired contact and choose *Add to Favorites* from the drop-down menu. Favorites appear in the *Favorites* list and in the *Contacts* list.

Call History

Click on the *Recent* tab to see your call history.

Visual Voicemail

If you have a voice message, the *Message* button changes color and indicates the number of messages received. Click this button to see a list of messages received or to listen to the messages.

File

The *File* Menu will allow you to *Change Password*, *Mute Notification Sounds*, *Add Contacts*, *Log Out*, or *Quit*. The *Log Out* option will require you to re-enter your credentials when re-opening the App while *Quit* will close the application, but allow re-opening without re-entering your credentials.

Tools

Click on the *Tools* menu and select *Options* to access your general settings and test your audio .

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 your calling location.

Privacy and Protection

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 deselect *Automatically Log In to MaX UC Desktop* to prevent logging in automatically when the app is opened and ensures that the next user has to log in using their own credentials.