

# MaX UC Desktop



## QUICK START GUIDE

You can use your Nextera 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 desktop, you need to install the MaX UC Desktop software on your PC or Mac. This guide helps you to do that as well as how to utilize the features and functionality available with MaX UC Desktop.

### ENSURE YOUR COMPUTER IS COMPATIBLE

MaX UC Desktop works on PCs running Windows 8 (desktop edition) and Windows 10. It also runs on Macs that have OS 10.12 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 Desktop works with most common headsets, including Bluetooth. It will even work with the answer/reject call button on some headsets.

### FIND YOUR PASSWORD

You need your MyNextera phone number and password to start using MaX UC Desktop.

If you don't have this information, call us on **877-639-8372**.

### DOWNLOAD AND INSTALL THE SOFTWARE

Download MaX UC Desktop from your MyNextera account. MyNextera can be accessed from [www.nextera.net](http://www.nextera.net) and click on the MyNextera icon in the upper righthand corner of the website (or directly at [www.mynextera.net](http://www.mynextera.net)) then enter your phone number and password. Within MyNextera, click on **View Account Settings** (in the lower right hand corner) then click **Support and Downloads**. Click **View Apps** then **Max UC** (or **Accession**) and either **Windows** or **Mac** options.

When prompted, save the file. Find the file in your downloads folder, open it, and follow the on-screen instructions to install the software. Your MyNextera phone number and password will be your log-in credentials. If you'd like to use the Chat feature, when prompted enter username as `YourTN@ams.nextera.net` (example `9525646789@ams.nextera.net`) then your MyNextera password.



### EXPLORING MAX UC DESKTOP

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.

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

MaX UC Desktop 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 Nextera 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.



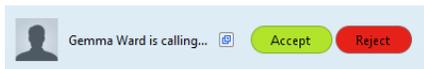
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### RECEIVING CALLS

When someone calls your Nextera number, you 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.

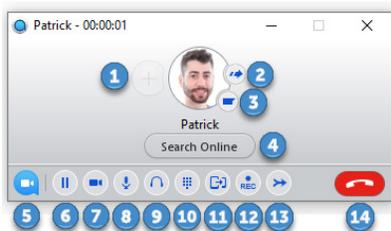


Depending on the other services you have from Nextera, you may see the incoming call on your desk phone, on your mobile phone, or on a tablet device. You can answer the call on whichever device is most convenient for you.

### 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. Send a chat message to the caller.
4. Perform a CRM look-up.
5. Uplift the call to Meeting (if subscribed).
6. Put the call on hold.
7. Send video.
8. Mute your microphone.
9. Adjust the volume.
10. Access the keypad.
11. Switch to another call.
12. Record the call.
13. Merge calls.
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.

### VIDEO CALLING



If the person you are talking to is also using MaX UC Desktop 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 receives 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



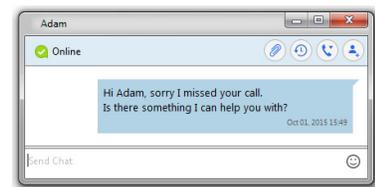
Use the Call Transfer icon to send any call to another number. A menu pop-up allows you to select a contact, or you can type in a completely new number to transfer the call to. You can also transfer the call to another of your devices that has the MaX UC Client installed, without having to hang up!

### INSTANT MESSAGING/SMS



Instant Messaging (IM) is available for contacts within your Nextera business group or SMS (if subscribed) for anyone else. Log on to Chat by clicking File then Sign into Chat. Initial sign-in username is YourTN@ams.nextera.net (example 9525646789@ams.nextera.net) then your MaX UC password.

Click on a contact's Chat icon to send them an instant message. To establish a Group Chat, click icon to left of the telephone number entry field and Start Group Chat. To establish a contact, click icon to the left of the telephone number entry field and Add Contact.



From 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.

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

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### 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. Click on the Presence selector, expand the **Available** option and choose between:



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!

You can select **Forwarding** to forward all incoming calls to another number. You are then prompted to enter the number you want to forward calls to.

Note that when you change your **Presence** or **Call Manager** settings, the change applies on all of your MaX UC Clients. So, if you step away from your computer and forget to update your status, you can change your status using MaX UC Mobile on your mobile phone instead.

### CHOOSING WHICH CALLS TO RECEIVE

You can specify how calls should be handled if they are from anonymous numbers, from VIPs, or from numbers on your **Unwanted Callers** list.

To do this, click on the **Presence** selector, expand the **Available** option, and select the **View all settings** option at the end of the menu.



This opens the **Call Manager Status** window, where you can set your call handling preferences.

### 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.
- Contacts in CommPortal contacts.
- Contacts in your corporate directory.

Add Contacts by clicking on icon to the left of the telephone number entry field.

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. 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 and chat 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



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 (if subscribed), or to listen to the messages.

### EMERGENCY CALLS

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

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### MEETING (IF SUBSCRIBED)

Meeting provides audio and video conferencing over the Internet including web collaboration features such as screen sharing, whiteboard annotations and presentation capability.

Choose Meetings to create, schedule or join a Meeting. Also can see at a glance Upcoming Meetings and to View Recorded Meetings.

Click Tools, Options, and Meetings to modify Meeting settings and to Download Outlook Plugin. This makes Meeting available through your Outlook Calendar. Further options are available through Advanced Settings.

Please see MaX Meeting Quick Start Guide for complete instructions.



### OTHER SETTINGS

- Click File to Mute Notification Sounds, add Contacts, start Group Chat, Disable Chat and SMS and to Log Out.
- Click Tools and Options to adjust various General Calls, Chat, Audio, Video and Web Apps settings. Web Apps allows choice of Collaboration, Conferencing, File Sharing, and CRM programs if established by your Administrator within MyNextera/CommPortal. Collaboration, Conferencing and File Sharing programs can then be launched from within Tools. CRM program will auto launch if Web App setting was established with Auto-Search option of When accepting calls.
- Click Tools and Groups to access MyNextera/CommPortal screen identifying the Groups (MADNs or MLHGs) with ability to log out of MLHGs.
- Click Tools and View Account to access all MyNextera/CommPortal settings for your telephone number.

### 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 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.

### MORE QUESTIONS?

If you have any additional questions about MaX UC Desktop, call us at **877-639-8372** or email [CustomerSupport@Nextera.net](mailto:CustomerSupport@Nextera.net).