

**Please note:** For reliable operation and call quality, MaX UC must have a good internet connection. Use a wired ethernet connection (instead of WiFi), if possible. You can use your computer's built-in microphone and speakers, but you will have much better audio quality if you use a headset.

## Download MaX UC for Desktop:

- Go to: <http://portal.popp.com>
- Number: End user's 10-digit phone number (or e-mail if e-mail login is enabled)
- Password:
  - First time login - click [Reset Password] and follow the instructions sent via e-mail to establish your password. You will be prompted to enter an Account Email (password reset e-mail address) if you do not have one set. You may also opt to login using your e-mail address instead of your phone number.

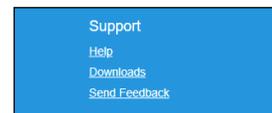


### Password Requirements:

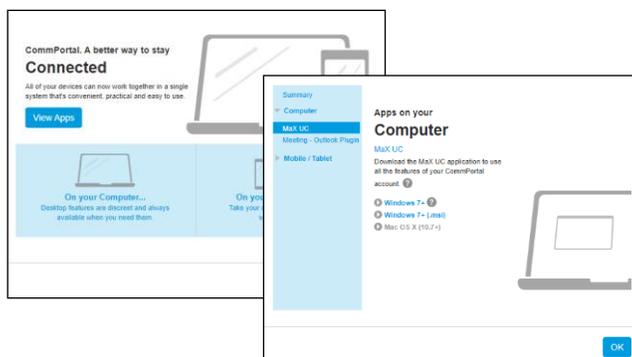
- 8-20 characters and must include 1 number, 1 letter, and one special character
- Cannot contain the same character more than 2x in a row
- Cannot contain more than 2 characters in a sequence (e.g., 1234, or abcd)
- Cannot contain 4 or more digits of the phone number (e.g., if phone number ends in 7900, the password cannot contain "7900" anywhere in the password)

- 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



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



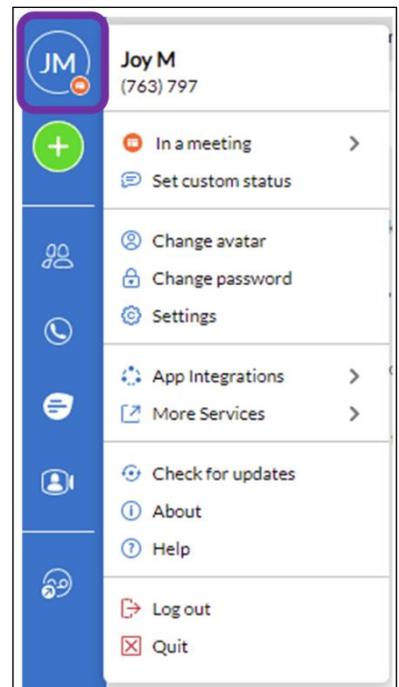
- Select [POPP] as the service provider and click [OK]
- Enter your 10-digit phone number and password on the VoIP Phone System, then click [Log In]
- Click [Accept] to accept the licensing agreement
- MaX UC Desktop has been successfully installed

**Open MaX UC:**

- Double-click the MaX UC icon  on the desktop

**Profile Menu Options:**

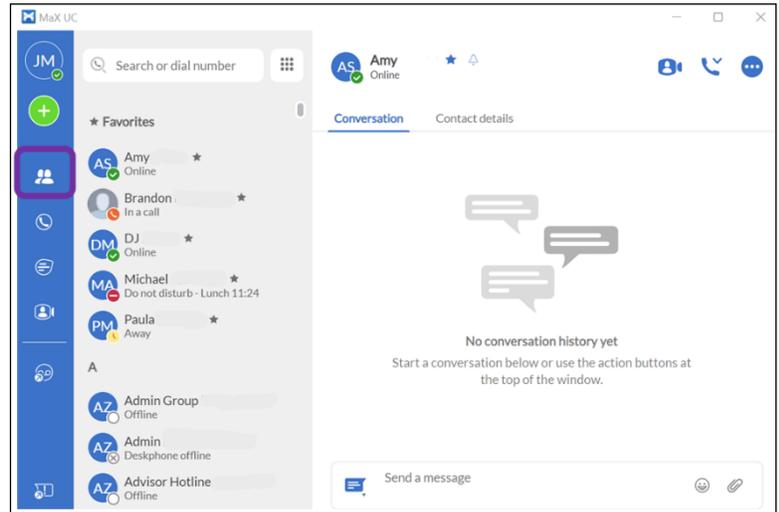
- Click the Profile icon  in the upper-left corner for:
  - Status: View and select Online, Busy, or Do Not Disturb or Open call manager for Call Manager settings, rules, schedule, etc.
  - Set custom status
  - Change avatar
  - Change password
  - Settings: Manage preferences for calls, chats, and contacts – see Options and Settings section below
  - App Integrations: Box.com or Webex
  - More Services:
    - Call park orbits: Park or retrieve parked calls from call park orbits
    - App information: MaX UC downloads and info
    - Groups: View Hunt Groups and Call Pickup Groups you are a part of
    - View Account: Manage account settings for calls, messages, notifications, or group mailboxes
  - Check for Updates: download updated versions of MaX UC
  - About: view MaX UC software version
  - Help: open the online MaX UC user guide
  - Logout
  - Quit (close)



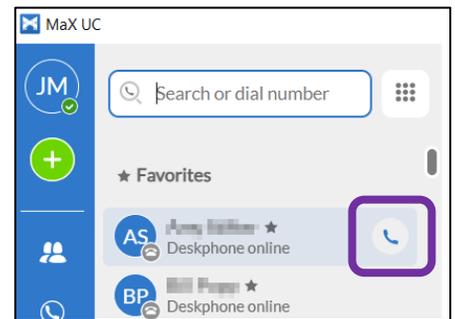
## Contacts:

- Click the Contacts icon  in the tab bar on the left side of the screen:

- View all VoIP Phone System Users, along with contacts synchronized with Microsoft Outlook, if desired
- Shows presence of Users with desk phones as “In a call” or “Deskphone available for calls” (when end user is not on the phone)
- Shows presence of other MaX UC users as “Online”, “Offline”, “Away”, or “Busy”



- Hover over a contact and click on the phone icon to call the contact



- Click on a contact to display contact options on the right side of the screen:

- Click  [Call] to place a call to the contact’s primary number
- Click  [Call] and select the number to call when the contact has multiple numbers
- Enter a message in the Chat field  and press [Enter] to send

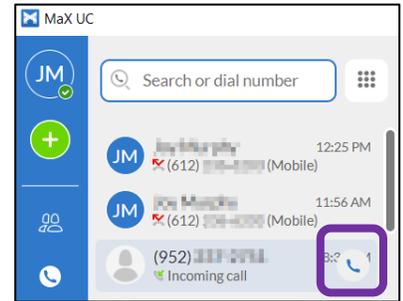
- Favorites: View contacts that have been designated as favorites

- Click on a contact and select/deselect the Favorite star  to add/remove the contact from Favorites

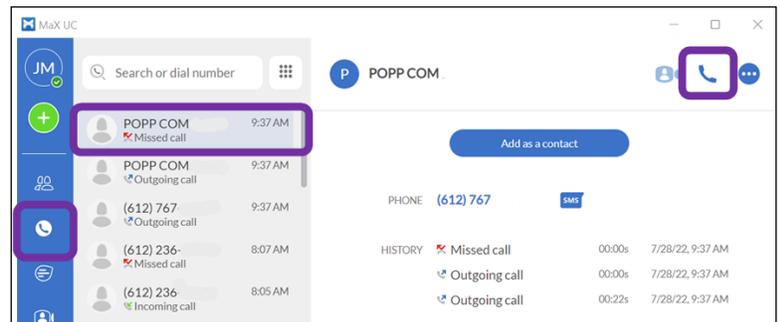
- Favorite contacts are denoted with the Favorite icon 

## Calls:

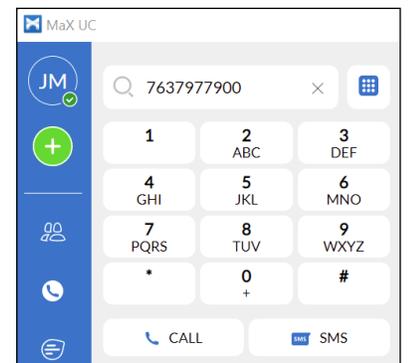
- Click the Calls icon  in the tab bar on the left side of the screen to view call history
- There are several ways to place a call:
  - Hover over a call, then click the Call  icon to place a call



- Click on a call in call history, then click the Call  icon to place a call

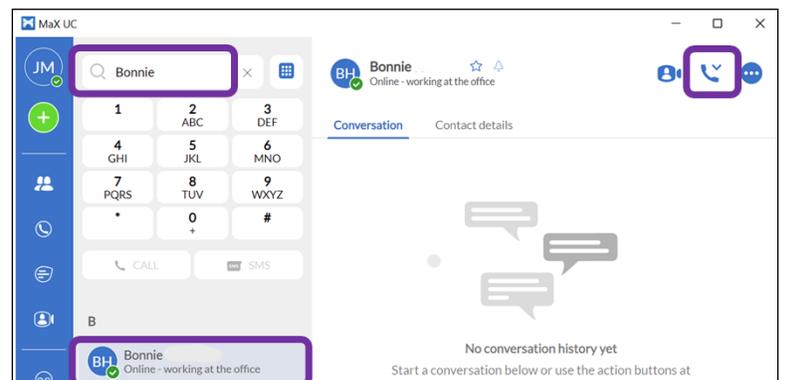


- Use the Keypad: Click the show keypad  icon to open the keypad:
  - Enter a 10-digit phone number. To place the call, click the [Call] button or press [Enter] on the computer keyboard.



- Enter a name: Matching entries from Contacts will appear below. Click the matching entry to view the contact record. Click the Call icon  to place the call.

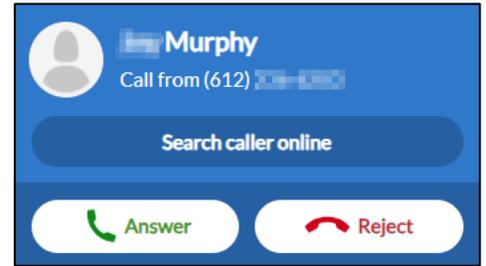
- Click the keypad icon  to hide the keypad



**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 VoIP Phone System is installed.

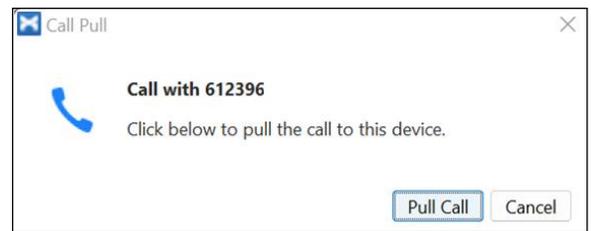
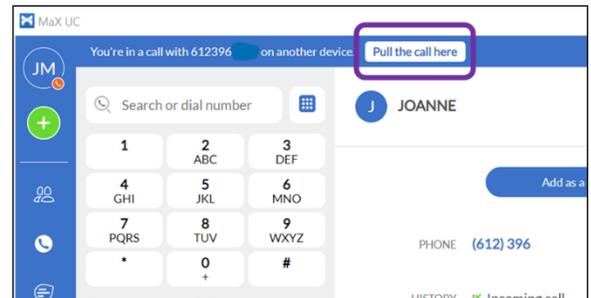
**Receive a Phone Call:**

- When a call is being received, a popup displays the name of the caller
  - Click the green [Accept] button to answer the call; or,
  - 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 VoIP Phone System.



**Pull Call using MaX UC Desktop**

- To pull an active call from your desk phone/mobile device to MaX UC Desktop:
  - Click on the “Pull the call here” message that is displayed at the top of the window
  - Click [Pull Call] to pull the call to MaX UC Desktop

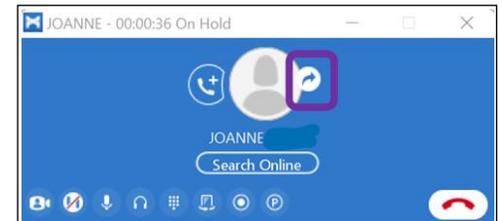
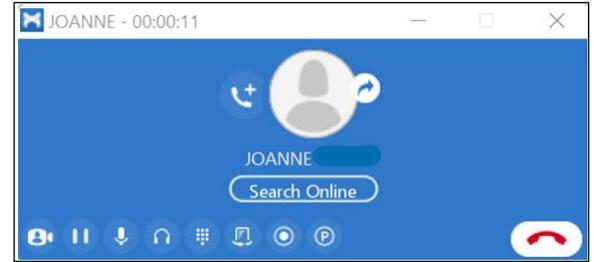


**Note:** When Direct Calling setting is OFF, “Call me on” setting in Profile > Settings > Calls must be set to “Account Phone”.

## 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:

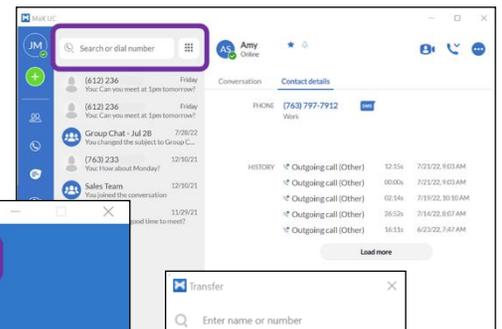
-  Convert call to a Meeting (MaX Meeting optional add-on)
-  Place Call on Hold
-  Adjust Microphone Volume
-  Adjust Headset Volume
-  Open Dial Pad
-  Switch Call to Another Device -all configured devices/phones ring and the call is transferred to the first-answered device
-  Record Call (recorded calls are saved to the hard drive location specified in Tools → Options)
-  Park Call (opens Call Park screen to select from call park orbits)
-  Add Participant (conference call)
-  Web App Integration (optional)
-  Chat
-  Unattended/Blind Transfer the call (opens Call Transfer screen to select/enter name or number to transfer to)



-or-

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

- While on a call, go to the main app screen and place a second 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)
- When the party answers, announce the call you will be transferring
- Click Transfer  and select the first caller's name/number to complete the transfer



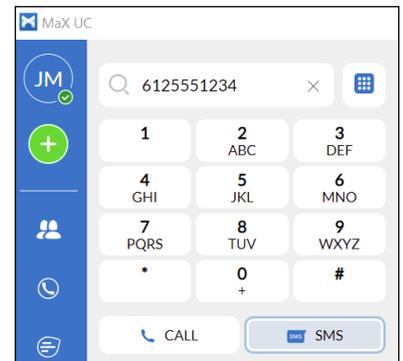
 Hang Up

## Chats:

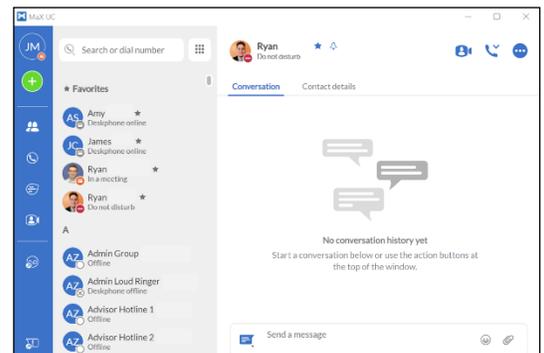
- Click the Chats icon  in the tab bar on the left side of the screen to view chat history
- There are two types of chat messages:
  1. IM (Instant Messages): Messages sent to other MaX UC users.
  2. SMS (Short Message Service)/Text Messages: Messages sent to mobile numbers outside of the VoIP Phone System (optional add-on, contact POPP for more information).

**Note:** MMS (i.e., multimedia texts with pictures/video) and group texts (i.e., texts with multiple recipients) are not supported.

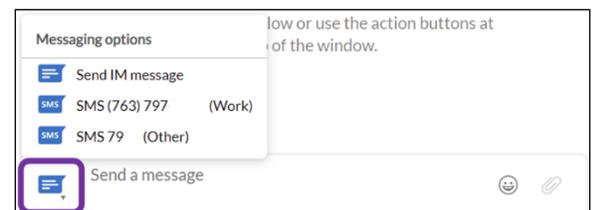
- There are many ways to start a new chat:
  - Enter a 10-digit phone number in the dial number field and click the [Chat] button



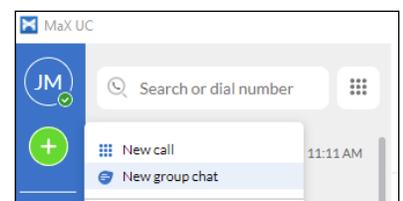
- From Contacts , click on a Contact and start a chat in the [Conversation] tab.



- Click the messaging options icon  and select “send IM message” to send an instant message or select another number (e.g., to send an SMS message to a VoIP Phone System User’s mobile phone)



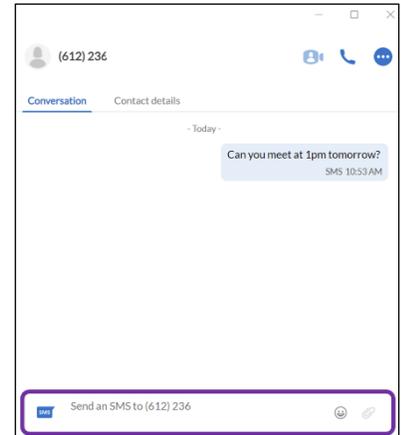
- To start a new group chat, click the Add button  and select “New group chat”



- Send message field:

- Enter text in the field
- Click the Add emoji icon  to add emojis
- Click the add attachment icon  to select a file to attach and send to the contact (available for IM messages only)
- Press [Enter] on the computer keyboard to send the message

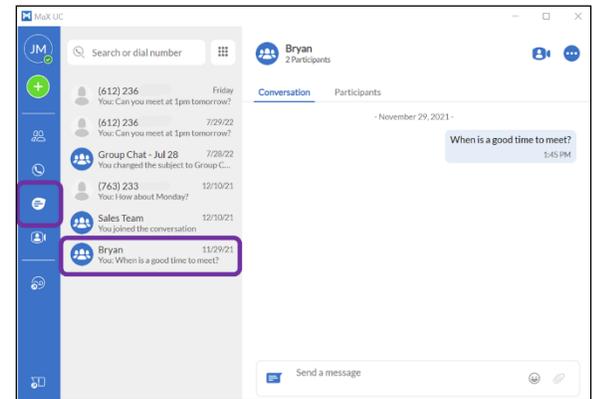
**Note:** Not all emojis sent from mobile devices to your VoIP Phone System phone number are supported in MaX UC and may not display properly.



- Reply messages will appear in the window above

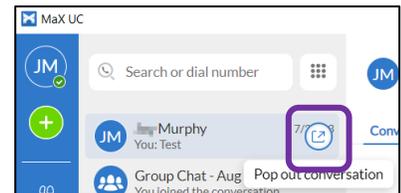
- Options at the top of the Chat window:

-  Start meeting (MaX Meeting optional add-on)
-  Call to call the contact
-  More options > select View chat history to view the chat history with this contact



- To resume a previous chat, click the Chats icon  in the tab bar on the left side of the screen, then click to select the chat from the list

- Hover over a chat in the list and click on the Pop out conversation icon to open the chat in a separate window



**Meetings** (optional add-on):

See MaX Meeting user guides on [popp.com/support](http://popp.com/support) or contact POPP at 763-797-7900 for more information.

## Messages:

### Voice Mails:

- The Voicemail icon  displays the number of new voice mail messages
- Click  to open the Messages screen
- Click the [Messages] tab to view a list of voice mail messages:
  - To play a message, click Play 
  - To delete a message, click Delete 



### Faxes:

- If Fax To Email is configured, click the [Faxes] tab to view a list of fax messages
  - Click the Read Fax Message icon  to view a fax
  - Click on [Actions] to Mark as Read, Forward as Email, or Forward as Fax



## Send Feedback:

- Click the Send Feedback icon  to report bugs/errors to the MaX UC developer

## Options and Settings:

Click the Profile icon  in the upper-left corner and select [Settings] to access the following settings:

- General – general settings, contacts, recordings, and analytics
- Calls – call settings and direct calling options:
  - If you are using a desk phone - turn the **Direct Calling** feature **off** 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 **on** to make and receive calls from MaX UC Desktop directly (this is softphone mode)
- Meetings (optional add-on)
- Chat – change your status based on Outlook calendar events or change status to away when inactive for a period of time
- Audio – microphone, in-call audio, ringtone, and headset button settings
- Web Apps – see MaX UC Desktop Integration User Guide for more information on integrating 3<sup>rd</sup> party web-based applications

## System Requirements

	<b>Windows</b>	<b>Mac</b>
<b>Processor</b>	2GHz processor or higher	2GHz processor or higher
<b>Memory</b>	2 GB RAM	2 GB RAM
<b>Hard Disk Space</b>	700MB	900MB
<b>Operating system</b>	Microsoft Windows 10 or 11 (but not devices powered by Arm processors)	macOS 11 (Big Sur) or later
<b>Connection</b>	IP network connection (broadband, LAN, wireless)	IP network connection (broadband, LAN, wireless)
<b>Sound Card</b>	Full duplex, 16-bit, or use USB headset	Full duplex, 16-bit, or use USB headset

MaX UC Desktop is compatible with the following types of audio and video equipment (users need a video camera to make video calls):

- External speakers and microphone (strongly recommended)
- Built-in speakers, microphone, and camera
- Dual-jack multimedia headset
- Bluetooth(R) multimedia headset
- USB multimedia headset
- USB video camera

### **For additional training and support:**

- Visit [www.popp.com](http://www.popp.com) or call POPP Communications at 763-797-7900