**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:

  o 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.
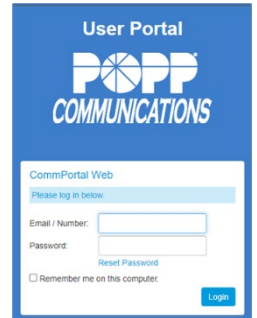
   **Password Requirements:**

    - 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)

  o Enter the password and click [Login]

- Click [Downloads] at the bottom of the screen
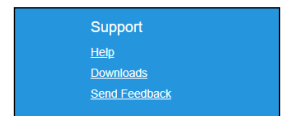
- Click [View Apps]
- Select the download to match the computer's operating system
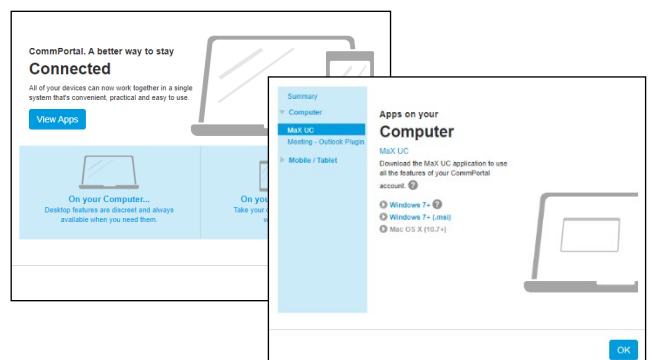
- Click [Run] to download and open the MaX UC Setup Wizard

- 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.

    Note: Selecting "Open Call Manager" allows you to access the User Portal without having to enter your phone number/email and password.
  - 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)
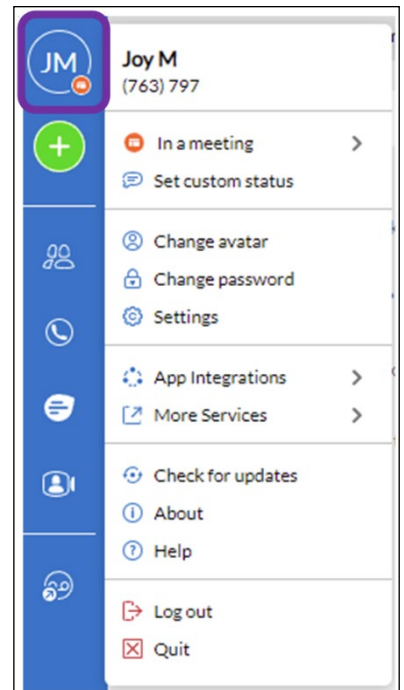
Contacts:

- Click the Contacts icon [icon] in the tab bar on the left side of the screen:
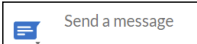
    - View all VoIP Phone System Users, along with contacts synchronized with Microsoft Outlook, if desired

    - 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"
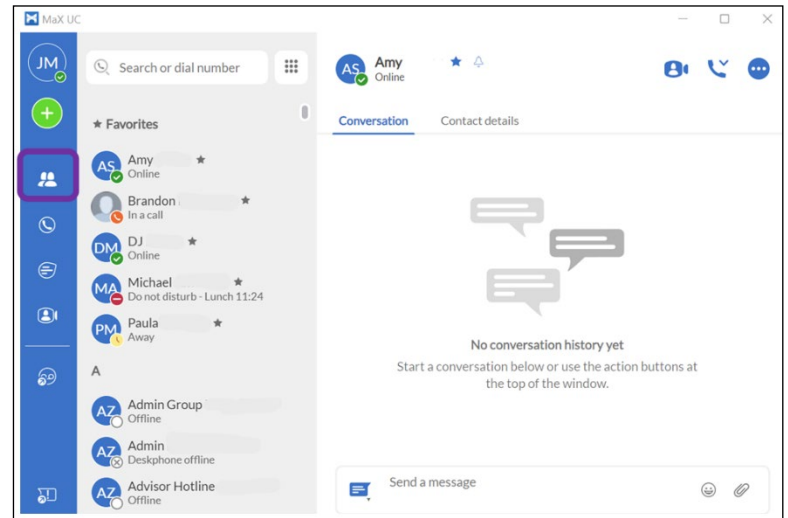
    - Hover over a contact and click on the phone icon to call the contact
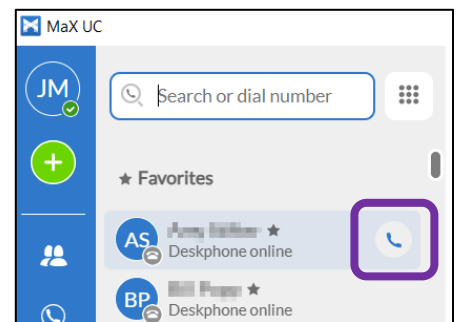
   - Click on a contact to display contact options on the right side of the screen:

        - Click [icon] [Call] to place a call to the contact's primary number

        - Click [icon] [Call] and select the number to call when the contact has multiple numbers

        - Enter a message in the Chat field [Send a message] and press [Enter] to send

    o Favorites: View contacts that have been designated as favorites

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

   - Favorite contacts are denoted with the Favorite icon [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:

  o Hover over a call, then click the Call icon to place a call
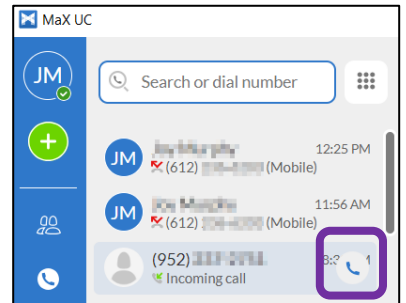
 o Click on a call in call history, then click the Call icon to place a call
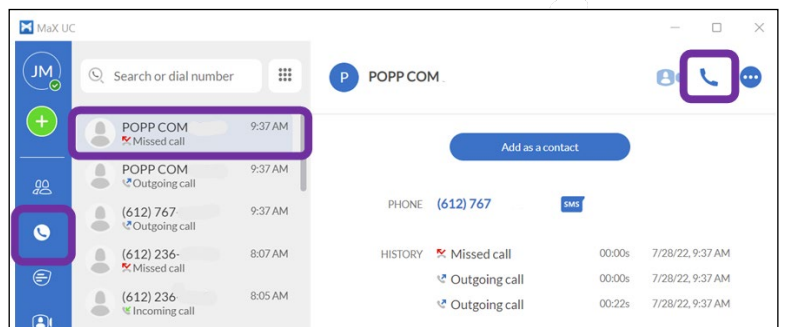
  o Use the Keypad: Click the show keypad icon to open the keypad:

    § Enter a 10-digit phone number. To place the call, click the [Call] button or press [Enter] on the computer keyboard.
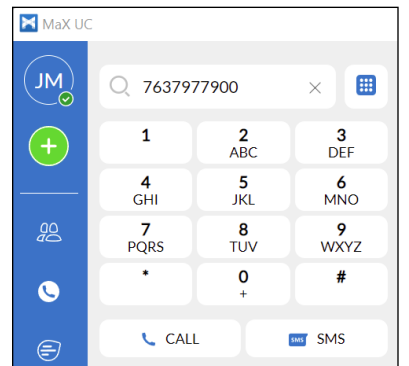
    § Enter a name: Matching entries from Contacts will appear below. Click the matching entry to view the contact record. Click the Call icon to place the call.

  o Click the keypad icon to hide the keypad
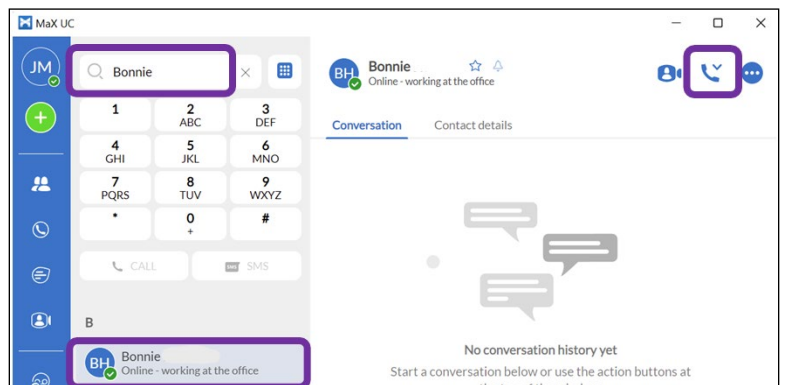
Note: MaX UC should not be used for emergency (911) calling. MaX UC will complete the 911 call; however, the call will show the address of the business office where the VoIP Phone System is installed.

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.
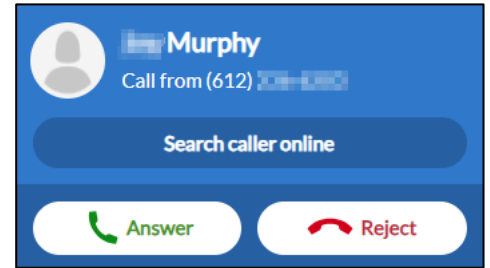
Pull Call using MaX UC Desktop

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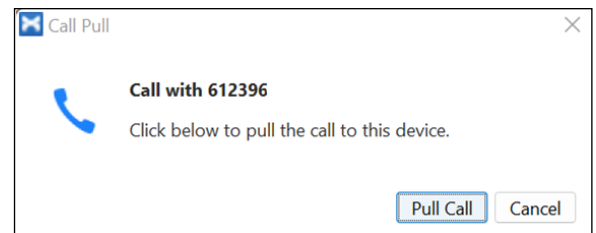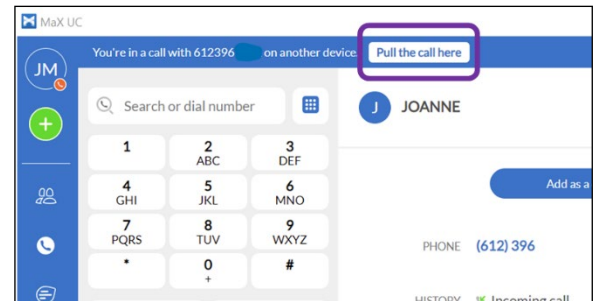
Note: When Direct Calling setting is OFF, "Call me on" setting in Profile > Settings > Calls must be set to "Account Phone".

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:

    ⏸ 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)
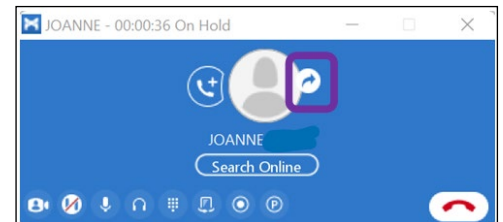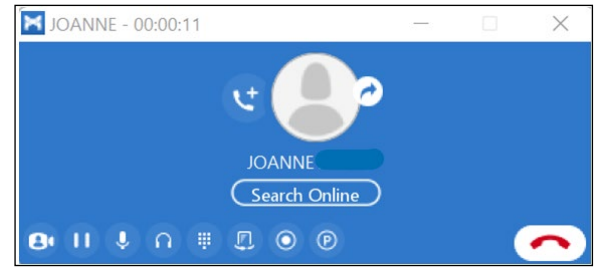
    Ⓟ Park Call (opens Call Park screen to select from call park orbits)

    📞⁺ Add Participant (conference call)

   Search Online 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
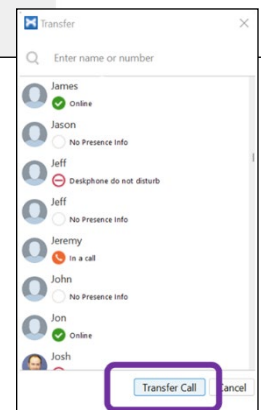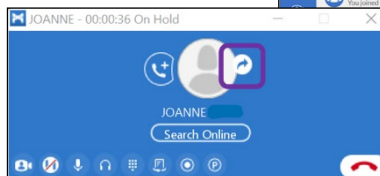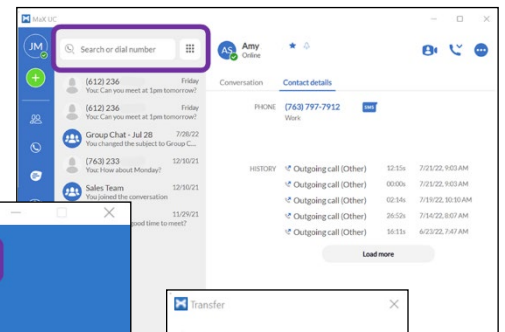
    ☎ Hang Up

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:

 o Enter a 10-digit phone number in the dial number field and click the [Chat] button
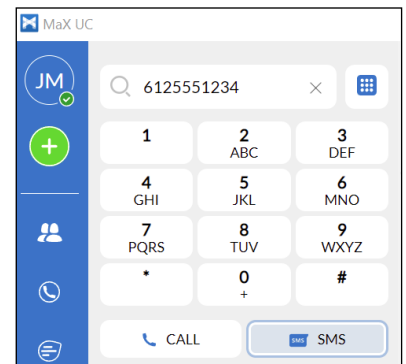
  o From Contacts 👥, click on a Contact and start a chat in the [Conversation] tab.
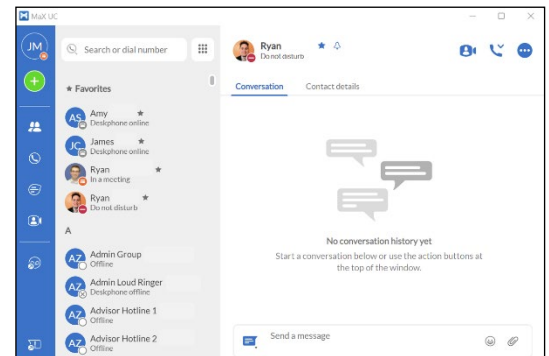
  o Click the messaging options icon 💬 and select "send IM message" to send an instant message or select another number (e.g., to send an SMS message to a VoIP Phone System User's mobile phone)
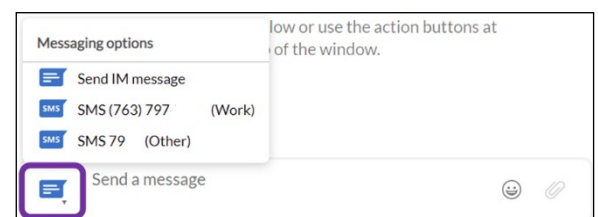
  o To start a new group chat, click the Add button ➕ and select "New group chat"
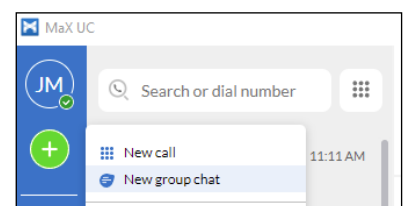
- Send message field:
    - Enter text in the field
    - Click the Add emoji icon ☺ to add emojis
    - Click the add attachment icon 📎 to select a file to attach and send to the contact (available for IM messages only)
    - Press [Enter] on the computer keyboard to send the message

  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.
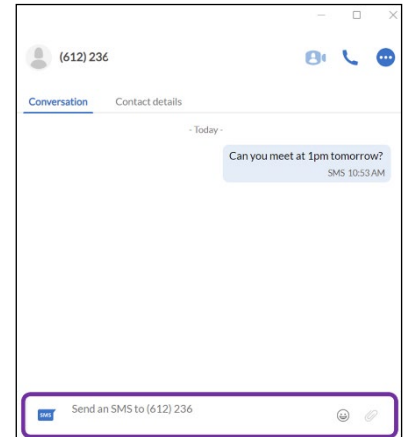
- Reply messages will appear in the window above
- Options at the top of the Chat window:
    - 📹 Start meeting (MaX Meeting optional add-on)
    - 📞 Call to call the contact
    - 💬 More options > select View chat history to view the chat history with this contact
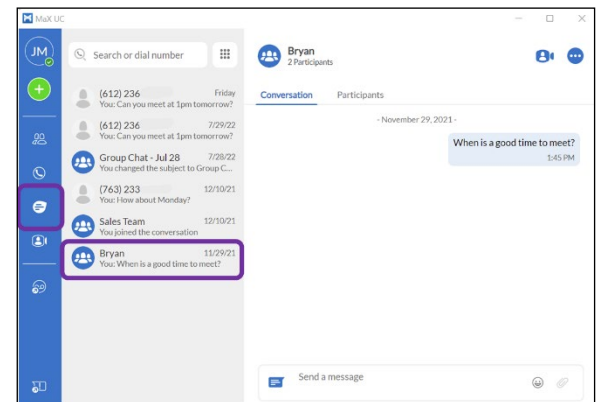
- To resume a previous chat, click the Chats icon 💬 in the tab bar on the left side of the screen, then click to select the chat from the list
- Hover over a chat in the list and click on the Pop out conversation icon to open the chat in a separate window
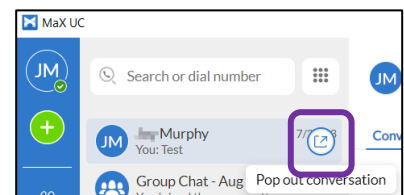
Messages:

Voicemails:

- The Voicemail icon [icon] displays the number of new voicemail messages

- Click [icon] to open the Messages screen

- Click the [Messages] tab to view a list of voicemail messages:
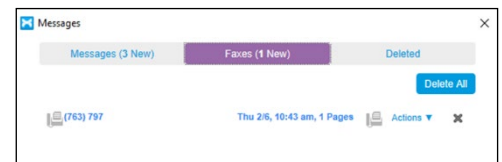
    o To play a message, click Play [icon]

    o To delete a message, click Delete [icon]

Faxes:

- If Fax To Email is configured, click the [Faxes] tab to view a list of fax messages

    o Click the Read Fax Message icon [icon] to view a fax

    o Click on [Actions] to Mark as Read, Forward as Email, or Forward as Fax

Send Feedback:

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

Options and Settings:

Click the Profile icon [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:
    o 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.
    o 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)
- 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 3rd party web-based applications

System Requirements

	Windows	**Mac**
Processor	2GHz processor or higher	2GHz processor or higher
Memory	2 GB RAM	2 GB RAM
Hard Disk Space	700MB	900MB
Operating system	Microsoft Windows 10 or 11 (but not devices powered by Arm processors)	macOS 11 (Big Sur) or later
Connection	IP network connection (broadband, LAN, wireless)	IP network connection (broadband, LAN, wireless)
Sound Card	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 or call POPP Communications at 763-797-7900