



MaX UC Desktop

INSTALLATION + TOOLS

QUICK REFERENCE GUIDE



September 27, 2023

MaX UC DESKTOP INSTALLATION + TOOLS QUICK REFERENCE GUIDE

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For more detailed information on using MaX UC and its features, download the comprehensive **MaX UC for Desktop User Manual** on our website:

<https://www.northland.net/support/bu-training/>

DOWNLOAD MaX UC FOR DESKTOP

Before you can begin using your new MaX UC Desktop Application, you will need to complete a few steps to download it. First, you will need to log in to your CommPortal Interface. Follow the steps below to log in to CommPortal. This will also walk you through setting up your voicemail for the first time.

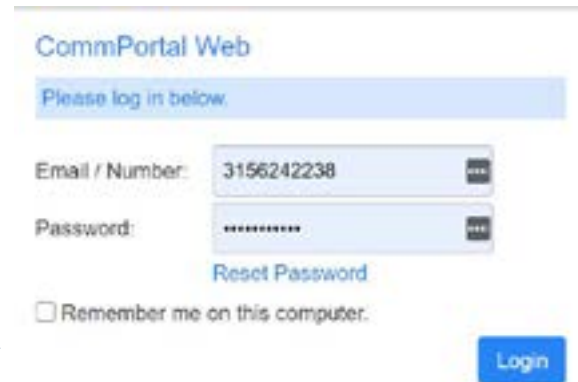
+ GETTING STARTED

Enter the following in your web browser to bring you to the login screen:

<https://bucommportal.northland.net>

Enter your 10-digit telephone number and the EAS Password provided to you from your System Administrator. You will be able to change the password during setup.

This will bring you to the CommPortal Setup Wizard where you will change your EAS Password, voicemail pin and record your name and greeting.

The image shows the CommPortal Web login interface. At the top, it says "CommPortal Web". Below that is a blue box with the text "Please log in below:". There are two input fields: "Email / Number:" with the value "3156242238" and "Password:" with a masked password "*****". To the right of the password field is a "Reset Password" link. Below the input fields is a checkbox labeled "Remember me on this computer:". At the bottom right is a blue "Login" button.The image shows the "Welcome to CommPortal Setup Wizard" screen. It has a blue header with the title. Below the header is a sidebar with a list of steps: "Welcome", "Change Password", "Set Voicemail", "Record Greeting", and "Finish". The "Welcome" step is currently selected. The main content area has the text "There are a few steps to complete in order to set up your account. Select 'Next' to begin." At the bottom right are "Log Out", "Cancel", and "Next" buttons.

On the Welcome Screen, click **Next**.

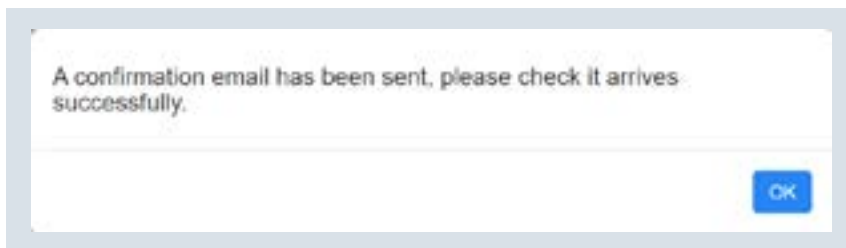
This will bring you to the page where you will change your EAS Password used for logging into CommPortal.

+ CHANGE YOUR COMMPORTAL EAS PASSWORD

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- + Enter the **EAS Password** provided by your system administrator into the **Old Password** field.
- + Enter the new password in the **New password** and **Confirm new password** fields.
- + Enter a valid email address. This will also be used for password recovery.
- + If you would like the ability to log in using the email address instead of the phone number check **Allow email login**.
- + When finished, click **Next**.
- + At the confirmation email screen, click **OK**.



+ CHANGE YOUR VOICEMAIL PIN



- + Enter a new voicemail pin.
Pin must:
 - + consist of digits only.
 - + be between 6 and 20 characters long.
 - + not have a single digit repeated more than 2 times in a row.
 - + not be a numeric sequence, e.g. 12345 or 54321.
 - + not contain, or match part of, a telephone number or email associated with this account.
- + Once entered, click **Next**.

+ RECORD YOUR NAME AND DEFAULT GREETING

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- + Select **Record Name** and follow the prompts to record your name.
- + Select **Record Greeting** and follow the prompts to record your default greeting.
- + You can skip this step temporarily by clicking **Next**. See Important Note below.
- + This will bring you to the **Finish** screen.

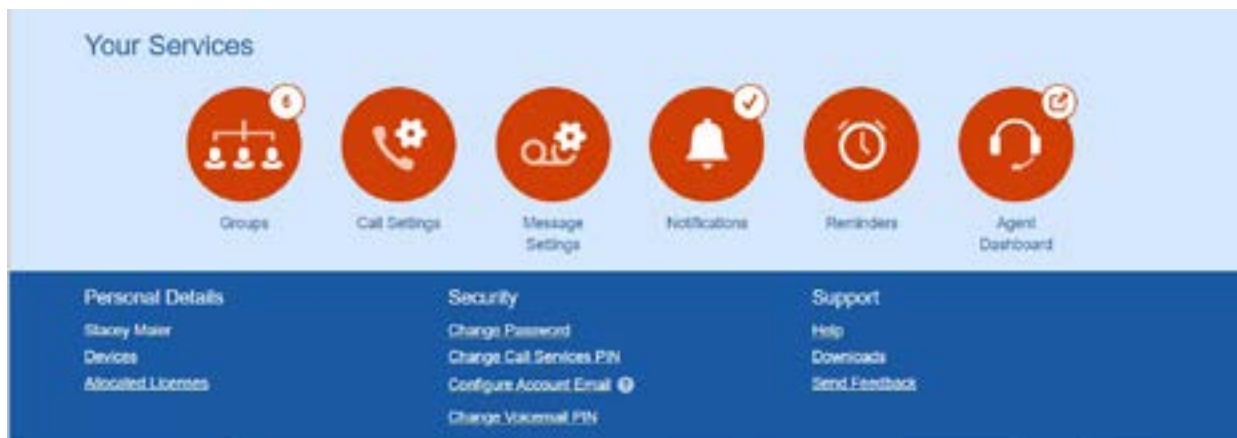
IMPORTANT: If your company uses an Automated Attendant with a dial by name option, you must record your name in order for the option to work. You can also record your name and greeting from any telephone. See your telephone or MaX UC User Manual.

+ FINISH



- + Click **Finish** to complete setup and be redirected to the CommPortal Home Tab.

DOWNLOAD MaX UC FROM COMMPORTAL COMMPORTAL HOME SCREEN

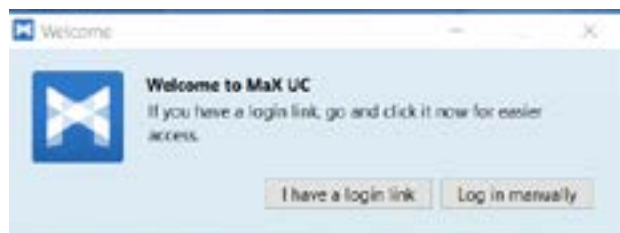


On the CommPortal Home Screen, scroll to the bottom and select Downloads.

+ On the next screen, select **On your Computer**.



- + Choose **MaX UC** and click on the appropriate operating system link:
- + Windows 10+
- + Windows 10+ (.msi) (only choose this option if you are an administrator and have a specific need to use the .msi installer).
- + Mac OS X (10.13+).
- + Click **Run** to start setup wizard.
- + Follow the **setup wizard** prompts.
- + Once the set up is complete, the Welcome screen appears.



+ On the Welcome screen, select **Log in manually**.



- + On the next screen, you will be asked to enter your current provider.
- + Click the drop down to find **Northland Communications – Business Unlimited**.



- + On the Login Screen:
- + Enter your **10-digit Telephone Number** and **EAS Password** provided by your System Administrator.
- + Read and accept the terms and conditions.

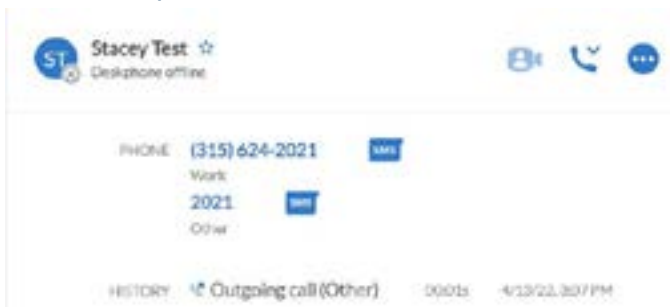
MAKING CALLS

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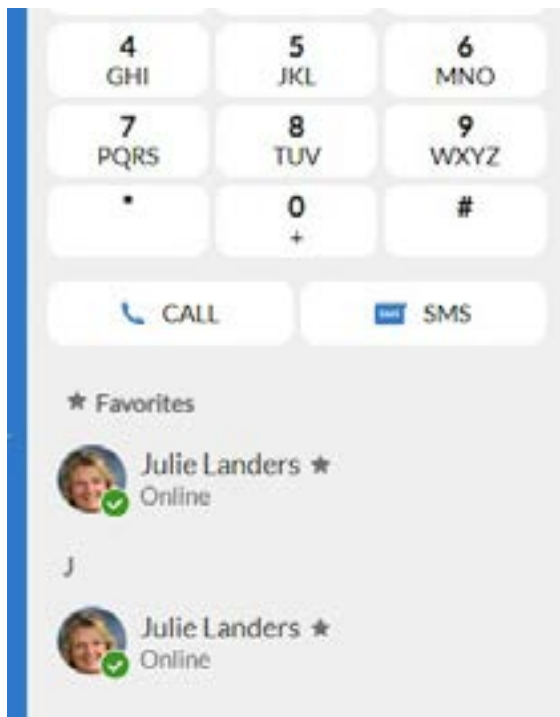
FROM CONTACTS




- + Select **Contacts** on the left.
This opens the new call window and displays contacts. Favorites appear at the top.
- + Hover over a contact to view the call button. Click the call button to call the phone displayed (work, mobile, etc.) The first number programmed is what is displayed and dialed.
- + Enter a contact name in the input field using your PC keyboard. As you type, MaX UC will display entries from your Contacts, Recents + Favorites. If they are a member of your business group, you will also see their Avatar and availability.
- + Select an entry from the list of results. Clicking on a contact will display the Chat and Contact information in the right window.
- + Click on the number you wish to call.



USE ACTIVE KEYPAD TO ENTER A NUMBER



- + Click  To show or hide the Active Keypad. When the keypad is active, the icon is blue.
- + Enter a number in the input field, using the Active Keypad or your PC. As you type, MaX UC will display entries from your Contacts and Recent tabs if the number is programmed.
- + To start the call, either press **Enter** on your keyboard or **Call** below the Active Keypad on MaX UC.
- + To clear a name or number from the input box, click the X.

RECEIVING CALLS

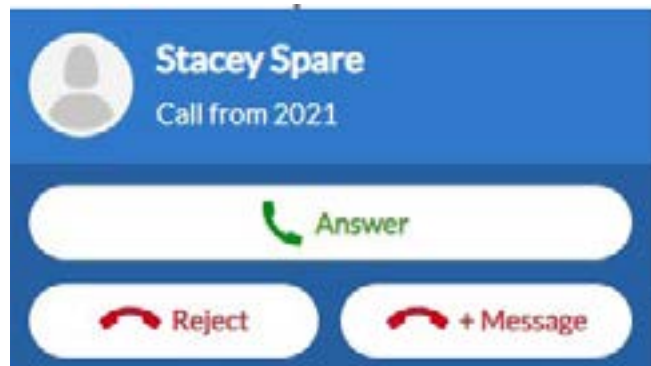
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Your softphone must be running and logged in on your PC if you want to receive calls. It can be minimized and running in the Windows system tray or taskbar, or the Mac dock. If your softphone is not running, your incoming calls will usually be sent to your voicemail (unless you have them configured to do something else).

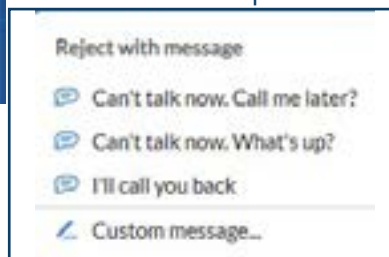
To hear the ringtone, you must have your computer speakers turned on or be on a headset. If your computer audio or headset volume are muted, you will not hear the ringtone.

INCOMING CALL PANEL

When you receive a call, you hear the MaX UC configured ringtone and a panel will appear on your desktop.



- + Click **Accept** to answer the call.
- + Click **Reject** to decline the call and send it to voicemail.
- + To reject a call from another member of your business group, click the dropdown next to the Reject icon and select either a preset message or create a custom message.



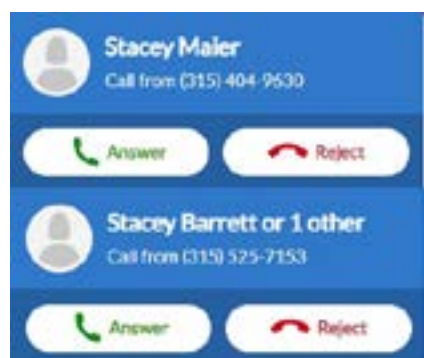
RECEIVE A SECOND CALL

Your account is configured to receive multiple calls on MaX UC.

If you are already connected to a call, when a second call is presented, you will hear a call waiting tone through your speakers or headset. You will also see the incoming call panel.

If you choose to answer the second call, the first call will automatically be held and you will be connected to the second call in the call window.

If you receive two incoming calls at the same time, you will see two incoming call panels on the display. You can answer or decline each call individually.














MANAGING CONNECTED CALLS



WHAT YOU SEE



- | | | | |
|--|---|--|--|
|  Start or create a meeting |  Hold/Resume |  Video Call |  Microphone Volume |
|  Headset Volume |  Active Keypad |  Push/pull call between devices |  Microphone Mute/Unmute |
|  Call Record (Active) ** |  Call Park |  End Call/Hang up | |

**** IMPORTANT:** Call recording laws from each state and country will differ from one another. They will require either One-Party consent or All-Party consent. Northland does not offer legal advice, you should consult your legal counsel for guidance on the compliance activities that are appropriate for your organization.

PLACE AN ACTIVE CALL ON HOLD

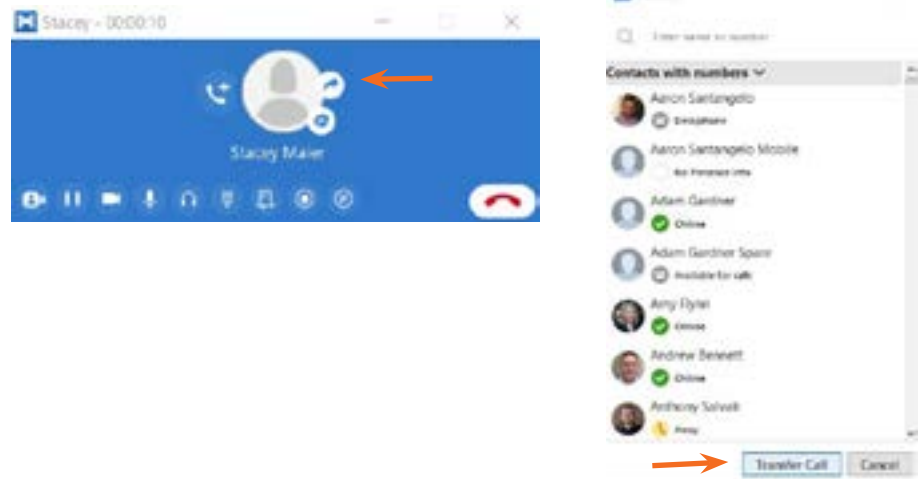
- + Click **HOLD**, a red line appears through **HOLD**. 
- + To return to held call, click **HOLD** again.

NOTES: If you answer a second call, your first call is placed on hold automatically.

CALL TRANSFER (BLIND AND ANNOUNCED)

BLIND (UNANNOUNCED) TRANSFER

- + Click the **TRANSFER** Icon in the call window. The directory is displayed.
- + Enter a name or number to choose who to transfer the call to.
- + Click **TRANSFER**, the call is transferred immediately.



ANNOUNCED TRANSFER

- + From the MaX UC App, using the Active Keypad, call the person you are transferring to (caller goes on hold). Do not use the keypad on the call window.
- + You can also search Contacts to find the number.
- + When the party answers, announce the call.



- + You will see both call windows.
- + In either of the call windows, click **TRANSFER**.
- + The option appears to transfer the call to the party or select another number.
- + Select the other party and the call is transferred.



ESTABLISH A MULTI-PARTY (ADHOC CONFERENCE) CALL (Maximum of 4)

- + Click **ADD PARTICIPANT**, the Contacts tab appears.
- + Make a second call (enter a telephone number or select from Contacts).
- + Click **ADD**, the second number is dialed.
- + When the second party answers, you are all connected.
- + Repeat to add additional participants. (Maximum of four).

NOTE: If the party who originates the call hangs up, all parties are disconnected.

CALL PARK

Call Park enables you to place a call on a “system” hold so that it can be retrieved by another Subscriber in your Business Group.

In order to use call Park on MaX UC, you must first enable it in your MaX UC Options.

ENABLE CALL PARK

- + Go to **PROFILE > SETTINGS**
- + Go to the **CALLS** tab.
- + Tick the checkbox to enable **CALL PARK**.



PLACE AN ACTIVE CALL ON PARK

- + On the Active Call panel, click **PARK**.
- + A Call Park Window appears displaying available Orbit codes.
- + To park the active call, hover over an available Orbit slot and click **PARK CALL HERE**.
- + Advise person which PARK/ORBIT slot the call is on.

NOTE: If a call is already parked, the Orbit slot will display a green **PICK UP CALL**.



RETRIEVE PARKED CALL

- + Go to **PROFILE > CALL PARK**. The Call Park Orbits are displayed.
- + Click **PICK UP CALL**.