Smart Office
MaX UC Desktop Client

NorthwesTel Smart Office

Quick start guide

Welcome to your Smart Office quick start guide for MaX UC Desktop!

The heart of Northwestel Smart Office is your MaX UC Desktop client. It is like having a desk phone on your computer. You can make and receive calls, put calls on hold, transfer calls, and make three-way calls, as well as send presence information to other people in our corporate directory who are using MaX UC Desktop.

Software installation

Internal Service Desk (ISD) will push this app to your laptop or desktop. Look for the Max UC logo.

Logging in

1. Open MaX UC.
2. Select **Log in manually**.
3. From the **Please select your service provider** drop-down list, select **Northwestel**.
4. Key in your existing Northwestel phone # and password, then click Login. Note: The email address will not work. For your first time logging in, the password is **1Metatest!** You will then be prompted to change your password.
5. Accept the End User License Agreement to start using MaX UC Desktop.
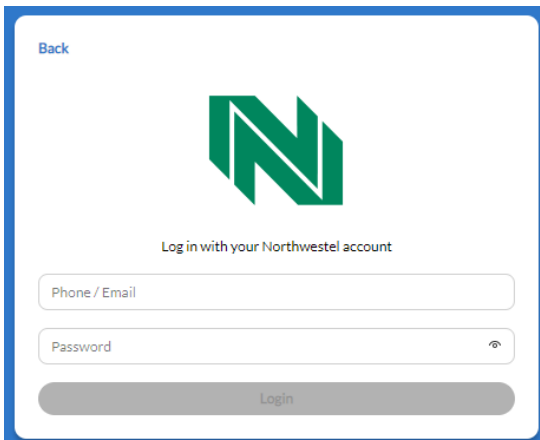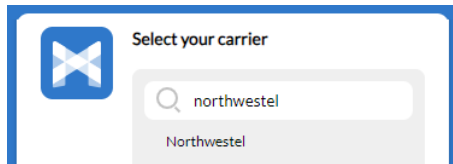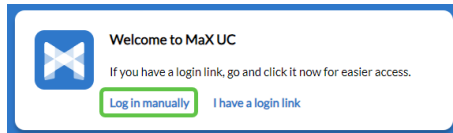
Change avatar

The avatar drop-down menu includes options to: Change avatar, Change password, View account, Settings…, and Check for updates.
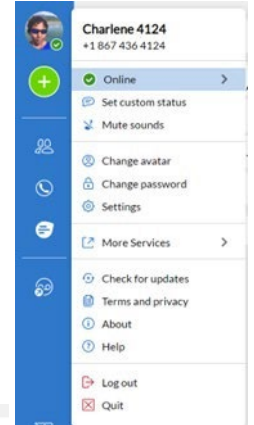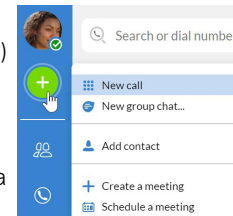
Settings

Select your avatar (initially blank) and select **Settings** to access your General, Calls, and Chat settings, test your Audio and Video, or view your Web Apps settings.

Add

Select the **Add** icon (+) to start a New call or New group chat, Add contact, Create a meeting, or Schedule a meeting.

Contacts

Select the **Contacts** tab to view your list of contacts. Depending on how your service is set up, the contact list may include:

- Contacts saved directly to MaX UC Desktop.
- Contacts in the Outlook address book stored locally on your computer.
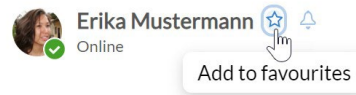- Contacts from CommPortal.

Select a contact and select the **Contact details** tab to view contact information and your call history with the contact.

Select the More icon (…) to View chat history, Add to favorites, Edit contact, or Delete contact.

Favorites

For quick access to frequently contacted people, select the Star icon to add the contact to your Favorites. Favorites appear at the top of the Contacts list.
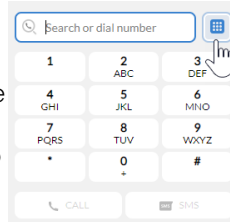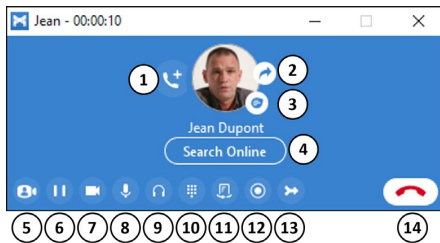
Make a call

On the Calls tab, select a contact and select the **Call** icon to call the contact. If your contact has more than one number, choose the number to call from the drop-down list.

You can also select the Dialer and enter a number to call on the keypad.

If the person you are calling has a Caller ID, they see your Company phone number.

During a call

While a call is in progress, you can use the call window to:

1. Add a participant.
2. Transfer the call to another contact, number, or device with MaX UC Client installed, without having to hang up!
3. Send a chat message to the other person.
4. Look up the contact in your Customer Relationship Management (CRM) system.
5. Uplift the call to Meeting.
6. Put the call on hold.
7. Turn your video on or off.
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.

During a 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 select the Transfer call icon to show the held call as a transfer option.
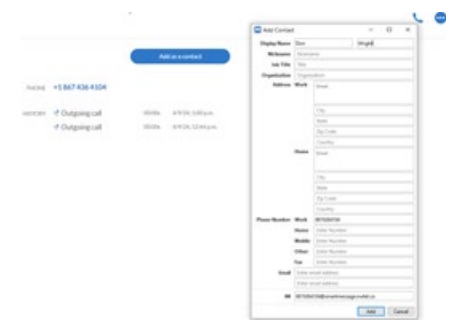
Receive a call

When someone calls your Company number, you can see a pop-up window 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 the person's details are in your contacts list, the pop-up displays the caller's name.

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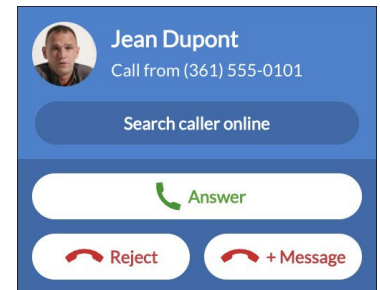

Depending on your configuration, if the caller is in your Contacts list, you can reject a call and send the caller an instant message explaining why you can't take the call. Select the drop-down list next to Reject and select one of the systems messages or select Custom Message to type your own message.

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 select the Merge calls icon to merge other callers into a single call.

Chats

If you have MaX UC Desktop with Instant Messaging, select the Chats tab and select a contact to send them an instant message, emoji, or file. You can also view your chat history with the contact on the Conversation tab.
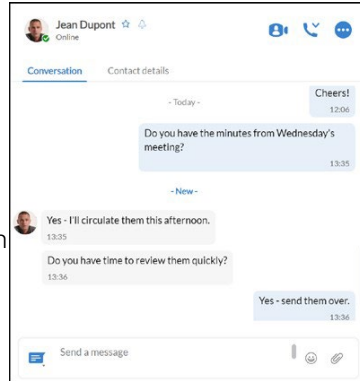
To chat with an external contact, you need to edit the contact by adding the IM Address on the contact profile. The address is the phone number followed by @smartmessage.nwtel.ca (e.g. 8674364105@smartmessage.nwtel.ca).

Call and chat history

You can see your recent call history on the Calls tab and your chat history on the Chats tab. Select a contact and select the Conversation tab to see your chat history with the contact or the Contacts details tab to see your call history with the contact.

Setting your presence

Select your avatar to set your status to Online ✔, Busy ⊘, or Do Not Disturb ⛔.

Select Set custom status to write your own status (maximum 100 characters) and select Save.

Your Presence information automatically shows when you are Away 🕐, In a call 📞, In a Meeting 🔴 (this references your Outlook calendar), or Offline ○.

Call manager

You can select "Open call manager" from the status drop-down to access your Call Manager and tell MaX UC Desktop how to handle your incoming calls.

You can choose Available for Calls or Do Not Disturb.
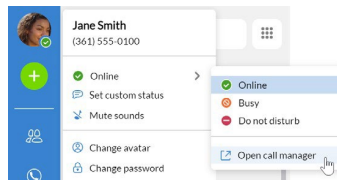
If you select Do Not Disturb, callers hear a recorded voice announcement saying that you are unavailable and are then connected to your voicemail. None of your devices will ring until you turn off Do Not Disturb, so be sure to use it carefully!

When your phone is busy, you can set it to Forward to another phone (and enter the phone number to forward calls to) or send to voicemail.

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

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

Voicemail

If you have a voice or video message, the Voicemail tab indicates the number of messages received. Select the Voicemails tab to view and listen to the messages received or read transcriptions of the messages into text (where available).

Notifications

Go to your Windows system notification settings and select the MaX UC app to configure your MaX UC Desktop notification preferences.

Accessibility

MaX UC Desktop supports the use of a screen reader.

Use Tab and the arrow keys to navigate through the application. You can also use the following shortcuts during a call.

- Ctrl-Alt-Shift-A to answer an incoming call.
- Ctrl-Alt-Shift-H to end a call or reject an incoming call.
- Ctrl-Alt-Shift-P to end a call or answer an incoming call.
- Ctrl-Alt-Shift-M to mute or unmute your microphone.

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Emergency calls

MaX UC Desktop lets you make calls from anywhere on the most convenient device. For this reason, you MUST update your address on the 911 Web Portal https://addressinfo.northern911.com:

1) Upon setting up your phone line update the 9-1-1 Information Database with your location.
2) Every time you move / work from a new location update the 9-1-1 database with your location.

Note: If you must call 911 and you use your VoIP phone line, your call will be routed to a southern call centre. The call centre agent will ask you where you are located, and they will then route your call to the most appropriate PSAP location. If you are unable to speak or respond, they will route your call using the address that is entered into the 9-1-1 Information Database.

Best practice: Use the nearest landline or cellphone to dial 9-1-1.

Privacy and protection

Once you have finished using MaX UC Desktop, select your avatar and select Quit to close the application. If you are using a shared computer, select your avatar and select Log Out to prevent other users from accessing your account.

To change your log-in preferences, select your avatar, select Settings and, on the General tab, 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 must log in using their own credentials.

For more in-depth information

Watch the tutorial video.
MaX UC Desktop Tutorial (metaswitch.com)

For support

Please contact our Business Care Centre at 1-888-423-2333.