PRTC MaX UC Desktop

You can use your PRTC 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.

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 PRTC CommPortal phone number (or email address if you have set this up) and password to start using MaX UC Desktop.

If you don't have this information, call us on 843-538-5481. You are prompted to change the password as part of completing the login process.

Download and Install the Software

Download MaX UC Desktop from: commportal.prtc.net.

When prompted, save the file. Find the file in your downloads folder, open it, and follow the on-screen instructions to install the software.

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.
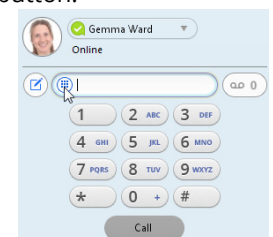
Making Calls

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 PRTC 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.
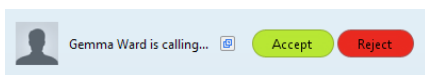
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Receiving Calls

When someone calls your PRTC 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 PRTC, 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.
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.
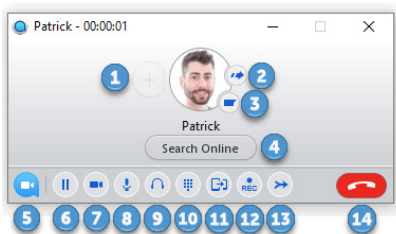
You may receive a call while you are already on another call. If you answer the new call, the current call is automatically placed on hold and the new call appears in a new call progress window. Switch between the two calls using the window for each one or click on the **Merge calls** icon to merge other callers into a single call.

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

If you have MaX UC Desktop with Instant Messaging, click on a contact's **Chat** icon to send them an instant message.
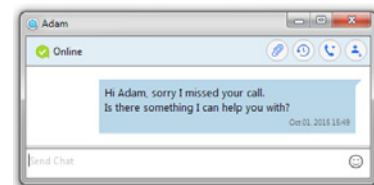
From the chat window, you can send files, view your chat history with the contact, call the contact, and add one or more participants to the conversation.

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.

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).
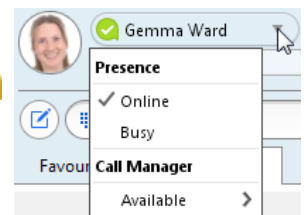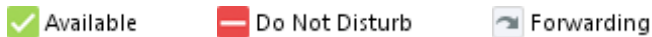
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Call Manager

You can tell MaX UC Desktop how to handle your incoming calls. Click on the Presence selector, expand the **Available** option and choose between:

✅ Available   ➖ Do Not Disturb   🔁 Forwarding

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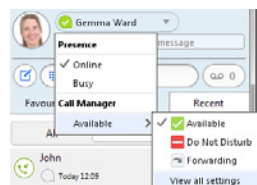
This opens the **Call Manager Status** window, where you can set your call handling preferences.

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.

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 (where available), 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.

Tools

Click on the **Tools** menu and select **Options** to access your general settings and test your Audio and Video devices. You can also access other services such as CRM, conference, file-sharing and cloud-hosted services from the **Tools** menu.

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 **843-538-5481** or email **support@prtc.us**