



# BTC Cloud Communications Quick Start Guide

# WELCOME

Welcome to Cloud Communications! This guide is intended to get you up and running with the basic features associated with the product. For more in-depth information, please see the tutorial videos on our website at [BTCBroadband.com](http://BTCBroadband.com).

This guide covers the three main elements of the Cloud Communications product:

1. Cloud Voice Portal - A web portal used for configuration and calling history
2. MaX UC Desktop - A Windows/Mac client for calling, instant messaging, and more
3. MaX UC Mobile - An app for iOS/Android that includes a full-featured dialer, instant messaging, and more

As always, you can also contact our local customer care team at 918- 366-8000 and we will be happy to assist you.

## CLOUD VOICE PORTAL

Cloud Voice Portal is the web portal used to configure the features on your new phone system. Once logged in, you can:

- View missed calls
- Listen to voicemail messages
- Manage your contacts
- Set up rules to route your calls
- Perform many other functions

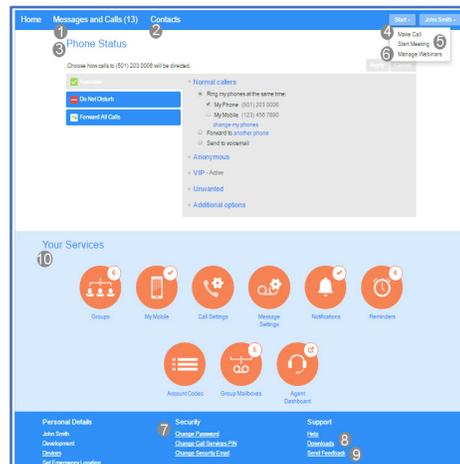
To get started, go to the login page at: [BTCBroadband.com](http://BTCBroadband.com). (Consult your administrator regarding your default password. Once you log in, you will be prompted to create a new password.)

**Note:** This guide is representative and images may vary from your individual Cloud Voice Portal screens.



## Getting Oriented

Once you are logged in you will see the main screen with the following menu options:



1. Messages and Calls (13) – Click this link to view and retrieve any voicemails.
2. Contacts – Import your contacts from Outlook or create new ones, then click on a name to dial.
3. Phone Status - Control your Call Manager settings.
4. Make Call – Make a call direct from the Cloud Voice Portal.
5. Start Meeting – Start a MaX UC Meeting.
6. Manage Webinars - Create or manage your MaX UC.
7. Security - Use these links to change your password or security email address.
8. Downloads – Download apps, for example the MaX UC App.
9. Send Feedback – Report bugs or make suggestions for improvements to the Cloud Voice Portal interface.
10. Your Services – Use these links to access a range of services available with your Cloud Voice Portal account, for example to change your call, message and notification settings, or set up a Reminder call.

## Messages and Calls

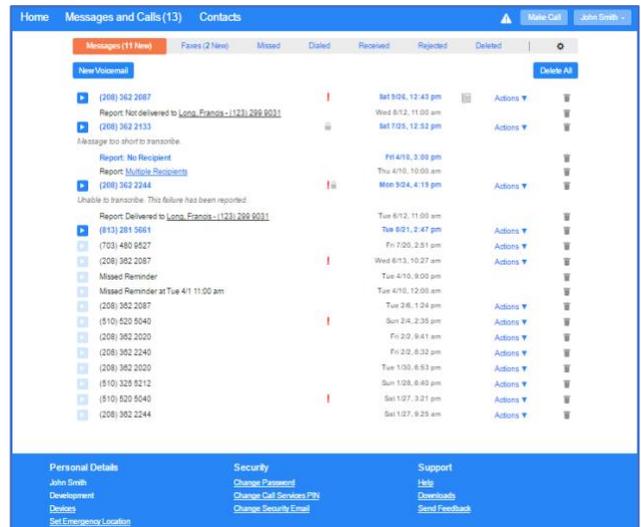
The Messages and Calls tab displays all recent call activity. Here you can retrieve voicemails and view calls based on whether they were missed, received, dialed, or deleted.

Click on one of the sub-tabs to get more detail. From the Missed, Dialed, and Received tabs you can click on the name and either call them, add them to your contacts, or jump to the caller's existing contact information.

Use the Action drop-down alongside each message to mark as Heard (or) New, Forward as Email, or Forward as Voicemail, or click the trash icon to delete it.

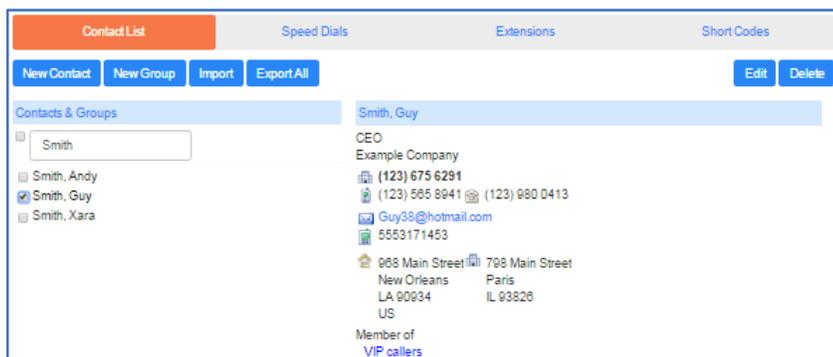
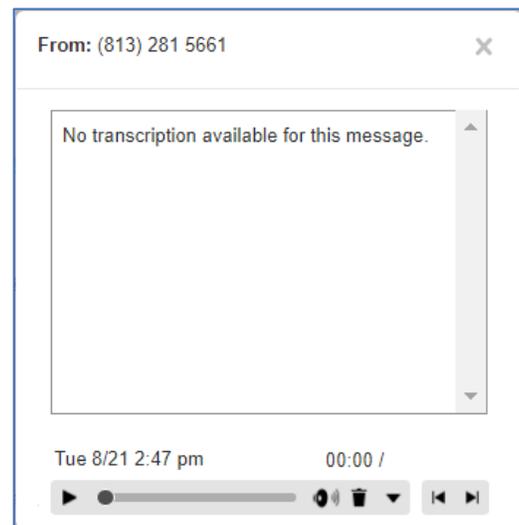
Click the 'play' arrow button to listen to a voicemail. Note that you can listen to your voicemails in any order. A window (as shown over the Messages and Calls screen) will open to display the Voicemail player where you can listen to and manage the message.

Click the 'New Voicemail' button at the top of the page to record and leave a voicemail as a memo (your computer must have a microphone to use this function).



## Contacts

The Contacts tab enables you to manage all of your contact information. Within it, you can create new contacts (using recent call information like a missed call or creating a new one from scratch), create groups of contacts, or import/export your contacts.

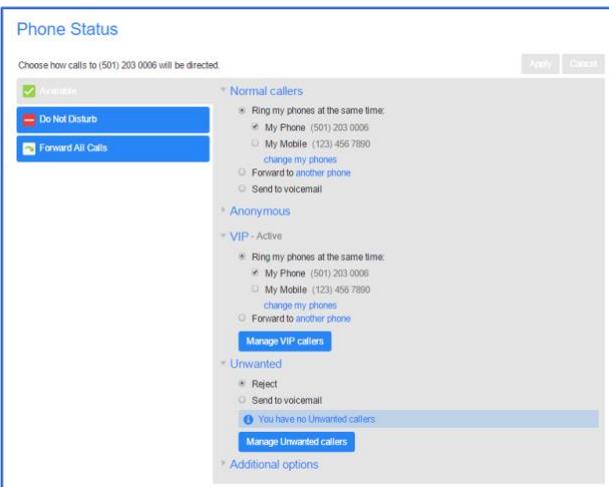


The fastest way to add your contacts is to import them from your email program. If you use Microsoft Outlook, follow these instructions:

- Open Outlook and go to the File tab, then Import and Export
- A new window should appear
- Select Export to File and Click Next
- Select Comma Separated Values from the list and click Next
- Select Contacts from the folder tree and click Next
- Save exported file as 'Outlook Contacts' and click Next, then save in a place you can easily locate such as the Desktop or My Documents
- Go back to the Cloud Voice Portal Contacts tab
- Click the Import button
- Click the Browse button to find the Outlook Contacts file
- Click Import
- Your contacts are now in!

## Call Manager

The Call Manager tab allows you to manage how incoming calls are routed to you. You can change your setting from Available to Do Not Disturb in the top section, which will route calls directly to voicemail if you're busy. There is also a forwarding option that enables simultaneous ring with your mobile device.



## Settings

The panel at the bottom of the Cloud Voice Portal Home page allows you to make various changes to your settings.

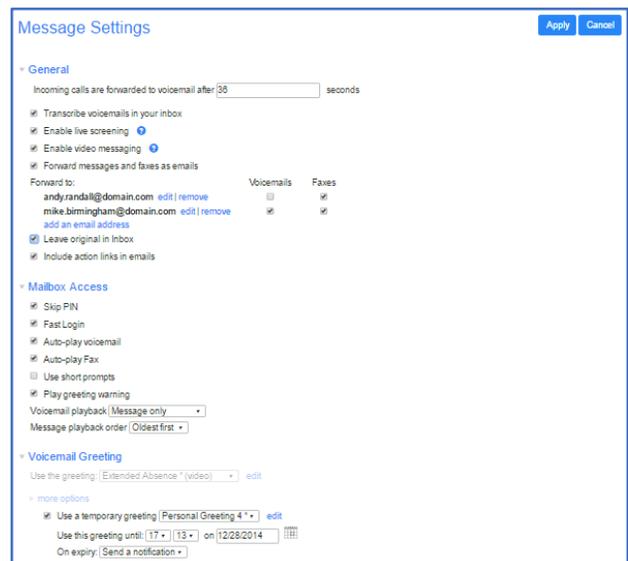
For example:

- To configure your phone according to your preferences, use the Devices link. On the screen that appears, use the 'set keys' link to configure your phone according to your preferences.
- To change your password and/or PIN, or your security email address, click on the links under Security at the bottom of the Home page.

The Calls Settings page allows you to control various call settings, for example withholding your caller ID and configuring Call Forwarding, Call Blocking or Call Jump settings.

The Messaging Settings page enables you to control how your messages are handled, for example you manage mailbox settings, customize how you are notified of a voicemail, configure greetings, and more.

Using Voicemail Greetings you can personalize your voicemail greeting by recording an announcement (a microphone is required).





# MaX UC (Mobility Tool) for Desktop Quick Start Guide

# MaX UC (Mobility Tool) for Desktop



## QUICK START GUIDE

You can use your BTC Broadband 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 will need your BTC Cloud Voice Portal phone number and password to start using MaX UC Desktop.

If you don't have this information, call us at (918) 366-8000.

You will be prompted to change the password as part of completing the login process.

## DOWNLOAD AND INSTALL THE SOFTWARE

Download MaX UC Desktop from: [voice.btcbroadband.com](http://voice.btcbroadband.com).

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 BTC Broadband 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.

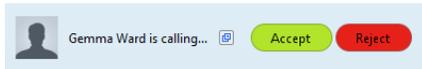
# MaX UC (Mobility Tool) for Desktop



## QUICK START GUIDE

### RECEIVING CALLS

When someone calls your 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.

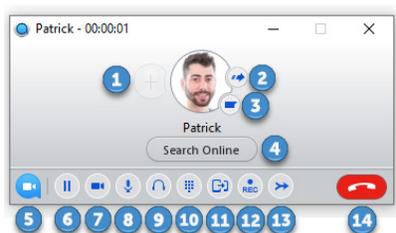


Depending on the other services you have from BTC Broadband, you may see the incoming call on your desk phone, on your mobile phone, or on a tablet device. You can answer the call on whichever device is most convenient for you.

### 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.

### VIDEO CALLING



If the person you are talking to is also using MaX UC Desktop on the same network, you can upgrade your call to video at any time. Click on the Video icon to send your video. The other person receives a prompt inviting them to switch on their video too. Click on the Video icon at any time to turn off your video feed.

### SEND THE CALL TO SOMEONE ELSE

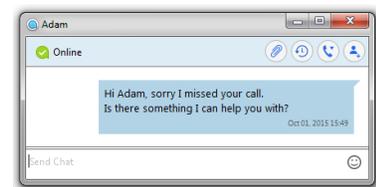


Use the Call Transfer icon to send any call to another number. A menu pop-up allows you to select a contact, or you can type in a completely new number to transfer the call to. You can also transfer the call to another of your devices that has the MaX UC Client installed, without having to hang up!

### 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.

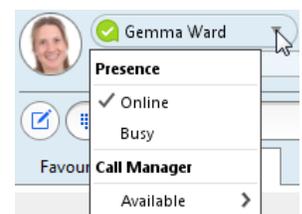
### REJECT CALL WITH IM

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).



# MaX UC (Mobility Tool) for Desktop



## QUICK START GUIDE

### 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 Cloud Voice Portal 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 (918) 366-8000 or email [support@mybtc.com](mailto:support@mybtc.com).



# MaX UC for Mobile Quick Start Guide

# MaX UC (Mobility Tool) for Mobile

## QUICK START GUIDE

You can use BTC Broadband's 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 mobile or tablet, you need to install the MaX UC Mobile app. This guide helps you to do that.

## ENSURE YOUR DEVICE IS COMPATIBLE

MaX UC Mobile works on:

- Android phones and tablets using version 6.0 or later.
- iOS devices running iOS 11.0 or later.

Video calling only works on devices that have a front-facing camera.

## FIND YOUR PASSWORD

You will need your BTC Cloud Voice Portal phone number and password to start using MaX UC Mobile.

If you don't have this information, call us at (918) 366-8000.

You will be prompted to change the password as part of completing the login process.

## DOWNLOAD AND INSTALL THE APP



Use the URL or QR code provided by BTC Broadband to find the MaX UC Mobile app in the App Store or Google Play. Tap Install to download the app to your device. Check the Terms & Conditions and tap Accept &

Continue.

Tap Open on the app (if prompted, select BTC Broadband as your Carrier). Then if not already present, enter your password. Tap Log in. If you are having trouble logging in tap the eye symbol to show your password and check that there are no errors.

You may need to periodically update your password (a prompt appears on screen). Until you update the password, you can only receive calls and meeting invitations. Failure to update the password within the allotted time results in you being locked out of your account.

If you want to have the ability to switch calls to your own cellular network (for example, if you move to an area with poor Wi-Fi connection during a call made on MaX UC Mobile) enter your own mobile phone number and tap Continue.



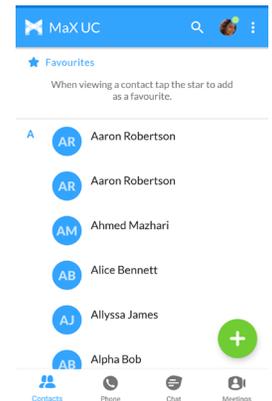
## EXPLORING MaX UC MOBILE

MaX UC Mobile is like having your desk phone on your mobile. You can make and receive calls, hold calls, transfer calls, and make three-way calls. You can even push and pull calls from your phone to other twinned devices, mid-call.

You can also use MaX UC Mobile to send messages to other people in your corporate directory who are using MaX UC (on any device).

MaX UC Mobile uses the Wi-Fi, broadband, or mobile data services available, so you can make and receive calls without using your mobile minutes.

You can access the MaX UC Mobile features using the Contacts, Phone, Chat and Meetings tabs at the bottom of the screen.



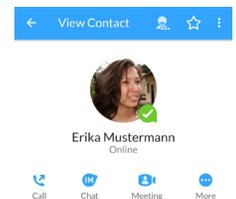
## CONTACTS TAB

MaX UC Mobile assembles a contact list for you to use. Select the Contacts tab to view your Contacts list. Depending on how your service is set up, the Contacts list may include:

- contacts that you type into MaX UC Mobile
- contacts stored on your mobile device
- contacts in Cloud Voice Portal contacts
- contacts in your corporate directory.

The contact's status appears in a speech bubble next to their profile picture.

Tap on a contact to access Call, Chat and Meeting options. Tap on the Plus icon  to add new contacts.



# MaX UC (Mobility Tool) for Mobile



## QUICK START GUIDE

### PHONE TAB

Tap on the Phone tab to make a call, view your Call History and listen to Voicemail.

To make a call, tap on a contact and select the number to call or tap on the Dialer icon  and enter the number.

If the person you are calling has caller ID, they will see your individual phone number.

The Voicemail tab indicates the number of messages received.

Tap on the Play icon to listen to a voicemail.

Tap on the Voicemail entry to see Call, Chat, Meetings and More options.

Tap More to access View contact, Mark as Unheard or Delete Message.

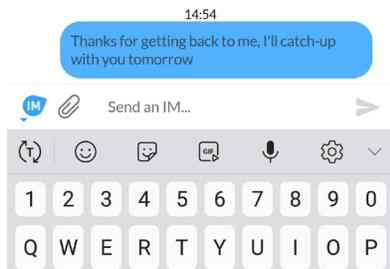
If you have a fax message, the Faxes tab appears; you can tap on it to see the fax.

### CHAT TAB

Tap the Chat tab to use Instant Messaging. Enter your Chat Address and Password and tap Sign in.

Tap on a contact to continue a previous conversation or click on the New message  icon and choose a contact to message.

From within the chat window, you can start or continue a conversation, send files, call a contact, or add one or more participants to a conversation. Your Instant Messages automatically sync to all your MaX UC client devices.



### MEETINGS TAB

Select the Meetings tab to Create or Schedule a Meeting, Join a Meeting or view Upcoming Meetings.

### RECEIVING CALLS

When someone calls your number, MaX UC Mobile offers the choice to accept or reject the call.

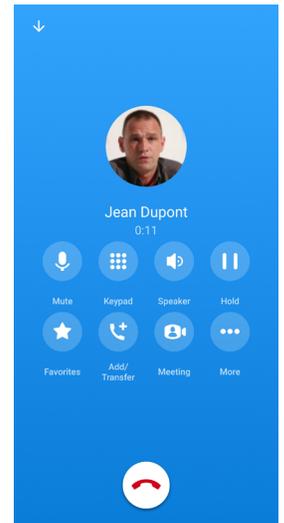


Depending on the other services you have from BTC Broadband you may also see the incoming call on your desk phone, on your desktop, or on a tablet device. You can answer the call on whichever device is most convenient for you.

### DURING THE CALL

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

-  Mute your microphone.
-  Access the Keypad.
-  Turn on the Speaker.
-  Put the call on Hold.
-  Invite a Favorites contact to join the call.
-  Add/Transfer the call allows you to make a second call and add the contact into a 3-way call or transfer the call.
-  Uplift the call to a Meeting.
-  Access More options (send video or switch the call to another device).



You may receive another call while you are already on a call. MaX UC Mobile gives you the option to:

- Hold the existing call and answer the new call.
- End the existing call and answer the new call.
- Ignore the new call.

### TRANSFER THE CALL

Tap Add/Transfer to send the call to another number. You can select a contact or type in a number to transfer the call to. You can also transfer the call to another one of your MaX UC client devices, without hanging up!

### SWITCH THE CALL TO ANOTHER DEVICE

If the call has poor audio due to an unreliable Wi-Fi or mobile data service connection, tap More then Switch and select This device (cellular) to move the call to your regular cell phone. Remember the call will now use your mobile minutes.

Alternatively, you can push the call to another of your MaX UC client devices, such as your desktop or your iPad. Tap More and then Switch and select Another device to push the call to whichever device is most convenient.

# MaX UC (Mobility Tool) for Mobile



## QUICK START GUIDE

### CALL PULL

You can pull calls from your other devices onto your mobile. If a call exists that can be pulled, MaX UC Mobile displays a **Call Available to Pull** option. Tap this option and follow the on-screen prompts to pull the call onto your mobile.

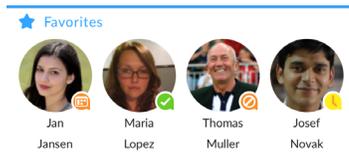
### VIDEO CALLING

If the person you are talking to is also using MaX UC Mobile and your phone has a front-facing camera, you can add video to your call. Tap **More** then **Video** to send video. The other person receives a prompt inviting them to switch on their video. Tap on the **Video** icon at any time to turn off your video feed.

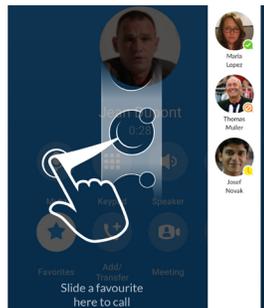
### FAVORITES



Tap the **Star** icon on a contact's directory entry to add the contact to **Favorites**. Favorite contacts appear in a banner at the top of the **Contacts** tab.

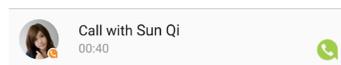


During a call, click on the **Favorites** icon to view your favorite contacts. Drag and drop a contact into the call window to setup a new call. When the contact answers, you can merge them into the initial call to create a 3-way call.



### CALL NOTIFICATION

On Android devices, when you minimize the call window, the notification banner at the top of the screen shows the active call.



On iOS devices, the call notification banner displays at the bottom of the **Phone** tab.

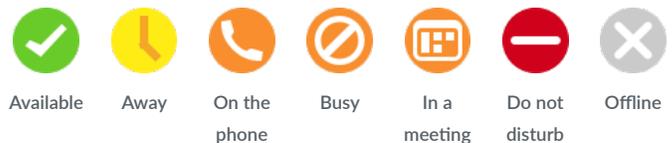


### PROFILE & SETTINGS

Click on your avatar in the top-right to access **Call**, **Chat**, **Contact**, and **Messaging** settings, and additional setup options. You can also configure your profile, send error reports and access **Call Manager** in the **Profile & Settings** window.

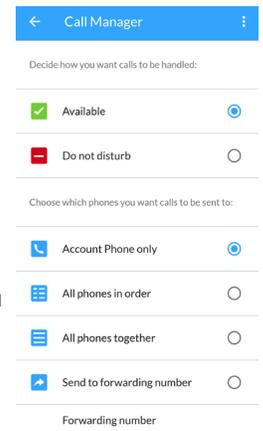
### PRESENCE

Whenever one of your contacts is signed in to their **Chat** account, MaX UC Mobile displays their presence information on the **Contacts**, **Phone**, and **Chat** tabs.



### CALL MANAGER

You can tell MaX UC Mobile how to handle your incoming calls. Tap the **Call Manager** option in the **Profile & Settings** window and select **Available**, **Do not disturb**, or **Forward all calls**.



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!

Select **Forward all calls** and, in the **Forwarding number** box, enter the number you want to forward all calls to.

Note that when you change your **Call Manager** settings, the change applies on all of your MaX UC Client devices.

### EMERGENCY CALLS

MaX UC Mobile lets you make calls from anywhere on the most convenient device. If you place an emergency call from MaX UC Mobile, the operator may not be able to identify where you are calling from.

### MORE QUESTIONS?

If you have any additional questions about MaX UC Mobile, call us at (918) 366-8000 or email [support@mybtc.com](mailto:support@mybtc.com).