



Max UC and CommPortal Quick Start Guide

WELCOME!

This guide is intended to get you up and running with the basic CommPortal and Max features. For more in depth information, please call us at 405-948-1797

This guide covers:

1. **CommPortal** - A web portal used to configure your call services.
2. **Max UC Desktop** - A Windows/Mac softphone for calling, instant messaging, and more.
3. **Max Mobile** - An iOS/Android app with full featured dialer, instant messaging, and more.
4. **Max Meeting** - A Windows/Mac application for audio and video conferencing over the internet.

As always, you can contact our local customer care team at 405-948-1797 and we will be happy to assist you.

COMMPORTAL

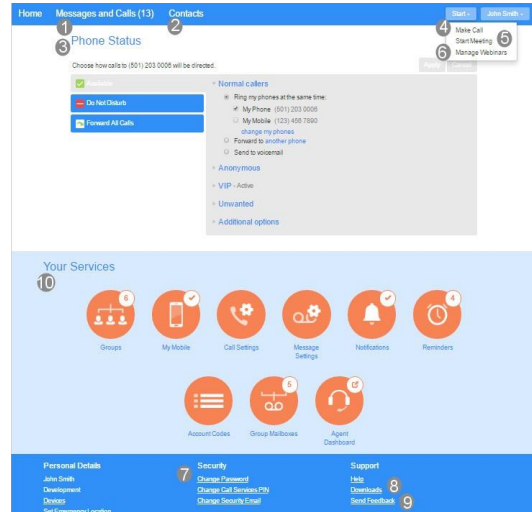
CommPortal is a web portal used to configure the features on your new phone system. With CommPortal you can:

- 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: <https://myportal.saddlebackcomm.com>. Your login will be **the 10-digit number** of your personal phone, and the password will be **TVDW4163**

GETTING ORIENTED

When you log in, you see the CommPortal Home page.



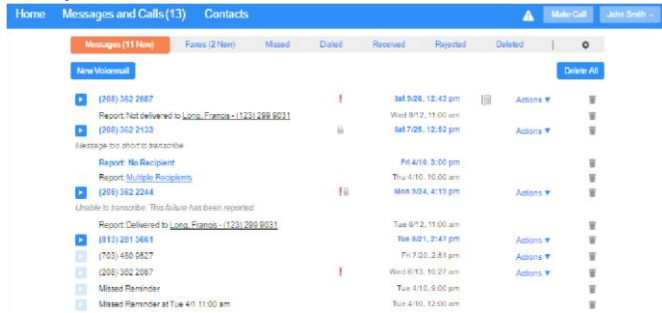
Note: This guide is representative and images may vary from your own CommPortal screens.

From the CommPortal Home page you can access the following features:

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 CommPortal
5. Start Meeting – Start an Max Meeting
6. Security - Use these links to change your password or security email address
7. Downloads – Download apps, for example Max Communicator
8. Send Feedback – Report bugs or make suggestions for improvements to the CommPortal interface
9. Your Services – Use these links to access a range of services available with your CommPortal account, for example to change your call, message and notification settings, or set up a Reminder call.

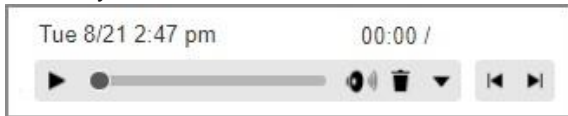
MESSAGES & CALLS


The **Messages & Calls** page shows all recent call activity.



Use the sub-tabs to view calls based on whether they were **Missed, Dialed, Received, Rejected, or Deleted.**

Click the Play icon to listen to a voicemail.



- Click the trash icon to delete the voicemail.
- Click  and select: **Reply, Mark as new/heard, Forward as Email, Forward as Voicemail, or Save File.**

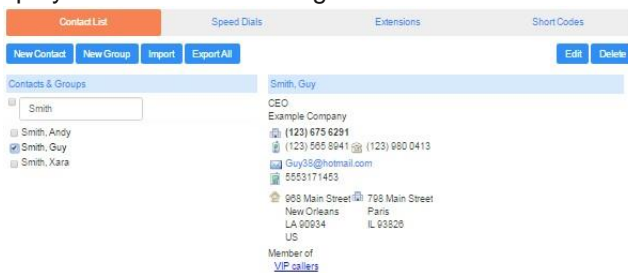
Click the **New Voicemail** box at the top left of the Messages and Calls screen to record and leave a voicemail as a memo (your computer needs a microphone to use this function).


CONTACTS


Use the **Contacts** page to manage your contact details. This page displays an alphabetical list of your currently configured contacts.

Use the Search for ... box to find a particular contact.

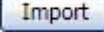
Use the checkbox on the left to select a contact and display their details on the right of the screen.



Click  to create a new contact.

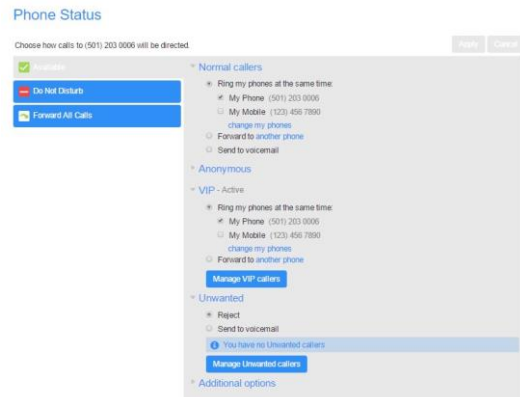
Click  to set up a group of contacts. You can send a message to several subscribers at once by messaging the group. You can also set up call handling rules for a group.

The fastest way to add your contacts to CommPortal is to import them from your email program. If you use Microsoft Outlook, you can export your contacts as a

CSV file and use the CommPortal  button to add these contacts to CommPortal.

CALL MANAGER

The Phone Status panel at the center of the CommPortal Home page displays your **Call Manager** that allows you to set your current availability status, and manage how incoming calls are handled.




The top section on the left enables you to set your status to *Available* or *Do Not Disturb*, or select to *Forward all Calls*.

The panel on the right allows you to set up call handling rules for *Normal, Anonymous, VIP, and Unwanted callers*. You can use options on this screen to add numbers to VIP and Unwanted callers lists.

APPS

Use the **Downloads link at the bottom of the CommPortal Home page** to launch the Apps page where you can download applications that allow you to access the features of CommPortal on your computer, mobile phone, and tablet.

Click  to see a list of the applications available and follow the on-screen instructions to install the app.

CHANGING SETTINGS

You can view and change your CommPortal settings directly from the CommPortal Home page, using the following icons.

- Click **Call Settings** to configure your call services, select how caller ID is displayed, and enter details for Call Forwarding, Call Blocking and Call Jump.
- Click **Message Settings** to control how your messages are handled, configure Mailbox Access settings, and record a Voicemail Greeting.
- Click **Notifications** to set up how you will receive notifications whenever you receive new messages.
- Click **Reminders** to set up single or recurring call reminders.

On the bottom panel, you can view your account information, change your security settings, and configure your phone keys.

- Click **Devices** and then select 'set keys' to configure your desk phone.
- Click **Change Password** or **Change Call Services PIN** to set a new password.
- Click **Send Feedback** to launch a pop-up where you can report any bugs with the CommPortal interface, or send a suggestion for improvements or new features.

MAX DESKTOP

Your Travis Strata phone service can be used 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 Communicator for Desktop software on your PC or Mac. This guide will help you to do that.

ENSURE YOUR COMPUTER IS COMPATIBLE

Max Communicator for Desktop works on PCs running Windows 7 or Windows 8. It also runs on Macs that have OS X 10.7 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 Communicator 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 Travis Strata CommPortal phone number and password to start using Max Communicator for Desktop.

This is your **10 digit personal phone number**, and the password is **TVDW4163**.

If you have difficulties with this, call us on **405-948-1797**.

DOWNLOAD AND INSTALL THE SOFTWARE

Download Max Communicator for Desktop from : myportal.saddlebackcomm.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 COMMUNICATOR

Max Communicator for 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 Communicator to send instant messages, transfer files, and send Presence information to other people in your corporate directory who are using Max Communicator (on any device).

Max Communicator 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 Travis Strata phone number.

RECEIVING CALLS

When someone calls your Travis Strata number, you will 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 Travis Strata, 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. Perform a CRM look-up.
4. Put the call on hold.
5. Send video.

6. Mute your microphone.
7. Adjust the volume.
8. Access the keypad.
9. Record the call.
10. Merge calls.
11. 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 Communicator 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 will receive a prompt inviting them to switch on their video too. Click on the **Video** icon at any time to turn off your video feed.

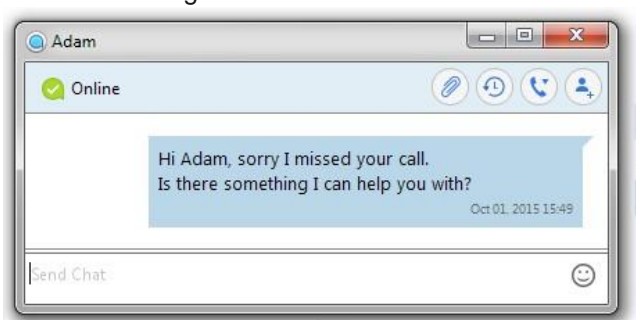
SEND THE CALL TO SOMEONE ELSE



Use the **Call Transfer** icon to send any call to another number. A menu will pop-up allowing 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 Max Communicator installed, without having to hang up!

INSTANT MESSAGING

If you have Max Communicator with Instant Messaging, click on a contact's **Chat** icon to send them an instant message.



From within 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 on 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

Your **Presence** information automatically shows when you are **Away** , **On the Phone** , or **In a Meeting**  (this references the information in your Outlook calendar).

CALL MANAGER

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

- Available
- Do Not Disturb
- Forwarding

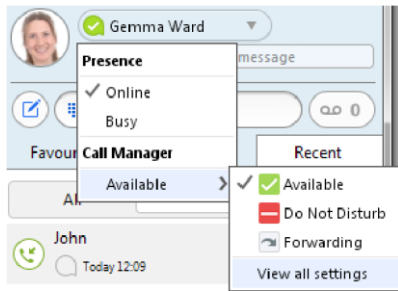
If **Do Not Disturb** is selected, callers hear a recorded voice announcement saying that you are unavailable and are then connected to your voicemail. None of your devices will ring until you turn off Do Not Disturb, so be sure to use it carefully!

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 Communicator devices. So if you step away from your computer and forget to update your status, you can change your status using the Max Communicator app 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 Communicator for 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 Communicator for Desktop.
- Contacts in the Outlook or Mac local address book stored locally on your computer.
- Contacts in CommPortal contacts.
- Contacts in your corporate directory.



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 Communicator lets you make calls from anywhere on the most convenient device. Therefore, if you place a 911 call from Max Communicator, the 911 operator may not be able to identify where you are calling from.

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.

PRIVACY AND PROTECTION

If Max Communicator is configured to automatically sync with Outlook, you can view and edit your Outlook contacts using Max UC.

MORE QUESTIONS?

If you have any additional questions about Max Communicator, call us at 405-948-1797 or email: info@travisvoice.com.

Max MOBILE

Your Travis Strata phone service can be used 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 Communicator for Mobile app. This guide will help you to do that.

ENSURE YOUR DEVICE IS COMPATIBLE

Max Communicator for Mobile works on:

- Android phones and tablets with ARM chips running 2.3.3 (Gingerbread) or later version.
- iPhone , iPad running iOS5 or later.

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

FIND YOUR PASSWORD

You will need your Travis Strata CommPortal phone number and password to start using Max Communicator for Mobile . This is your **10 digit telephone number**, and the password is **TVDW4163**. If you don't have this information, call us on **405-948-1797**.

DOWNLOAD AND INSTALL THE APP



Search for Max UC in Google Play or iTunes and touch **Install** to download the app to your device. Check the Terms & Conditions and touch **Accept & Continue**.

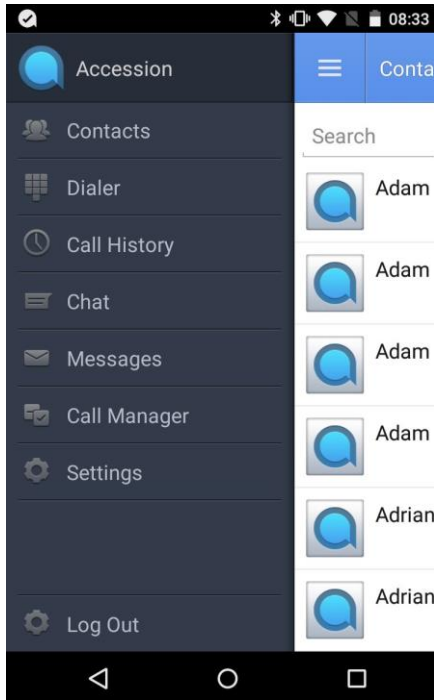
Tap **Open** on the app and select Re-Invent Telecom as your Carrier. Enter your Travis Strata *Phone Number* and *Password* and tap **Log in**.

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 Communicator) enter your own mobile phone number and tap **Continue**.

EXPLORING MAX COMMUNICATOR

Max Communicator for 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 Communicator to send messages to other people in your corporate directory who are using Max Communicator (on any device).

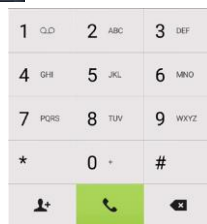
Max Communicator uses the Wi-Fi, broadband, or mobile data services available, so you can make and receive calls without using your mobile minutes.

Tap on the **Menu** icon, or swipe right on the screen, to view the Max Mobile menu.

MAKING CALLS



To make a call, select the **Dialer** tab and enter the number you are calling into the Max dialer, or simply tap on the contact and touch the number you would like to use to call the contact.

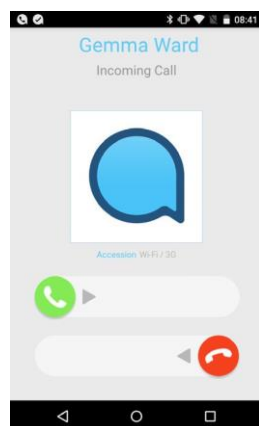


If the person you are calling has caller ID, they will see your individual **Company** phone number.

RECEIVING CALLS









When someone calls your Travis Strata number, the Max Communicator app offers you the choice to accept or reject the call.

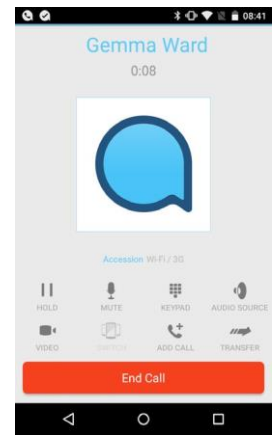
Depending on the other services you have from Travis Strata you may also see the incoming call on your desk phone, on your desktop, or on a tablet device. You can answer the call on whichever device is most convenient for you



DURING THE CALL

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

-  Put the call on hold.
-  Mute your microphone.
-  Access the keypad.
-  Turn on loudspeaker.
-  Send video.
-  Switch the call to another device.
-  Merge calls.
-  Transfer the call.



You may receive another call while you are already on a call. Max Communicator for 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.

VIDEO CALLING



If the person you are talking to is also using Max Communicator and your phone has a front-facing camera, you can add video to your call any time. Click on the **Video** icon to send your video. The other person will receive a prompt inviting them to switch on their video too. Click on the **Video** icon at any time to turn off your video feed.

SWITCH THE CALL TO ANOTHER DEVICE



If the call has poor audio due to an unreliable Wi-Fi or mobile data service connection, you can touch the **Switch** icon and select **This device (cellular)** to move the call to your regular cell phone. Remember that the call will now start to use your mobile minutes.

Alternatively, you can choose to push the call to another of your devices running Max Communicator, such as your desktop or your iPad. Touch the **Switch** icon and select **Another device** to push the call to whichever device is most convenient.

CALL PULL

You can also pull calls from your other devices onto your mobile. If a call exists that can be pulled, the Max

Communicator menu displays a **Call Available to Pull** option. Tap this option and follow the on-screen prompts to pull the call from your other device onto your mobile.

TRANSFER THE CALL TO SOMEONE ELSE



Use the **Call Transfer** icon to send any call to another number. A menu will pop-up allowing 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 Max Communicator installed, without having to hang up!

CALL HISTORY



See your full call history by selecting the **Call History** tab.

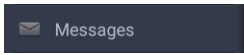
INSTANT MESSAGING



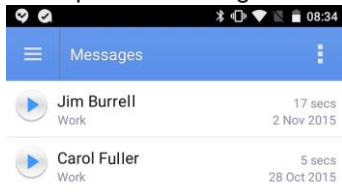
Tap the **Chat** tab to use Instant Messaging. Enter your Chat Address and Password and tap **Sign in**. You can then select a contact to send an Instant Message to.

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.

VOICEMAIL



If you have a voice or video message, the **Messages** tab indicates the number of messages received. Select the **Messages** tab and tap on a message to listen to it.



CALL MANAGER



You can tell Max how to handle your incoming calls. Tap the **Call Manager** tab 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 Communicator devices.

YOUR CONTACTS LIST



Max Communicator for 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 directly into Max Communicator for Mobile.
- Contacts stored on your mobile device.
- Contacts in CommPortal contacts.
- Contacts in your corporate directory.

SETTINGS



Use the **Settings** tab to manage your Call, Chat, Contact, and Messaging settings, and to access additional setup options. You can also send error reports from the **Settings** tab.

PRESENCE

Whenever one of your contacts is signed in to their Chat account, Max Mobile displays their presence information on the **Messages**, **Call History**, and **Chat** tabs.


EMERGENCY CALLS


Max Communicator lets you make calls from anywhere on the most convenient device. If you place a 911 call from Max Communicator, the 911 operator may not be able to identify where you are calling from.


MORE QUESTIONS?

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full-screen display.

 **Exit Full Screen** exits the full-screen display.

 **Gallery View** displays the video for all meeting participants.

 **Speaker View** displays the video for the current speaker.

MORE QUESTIONS?

If you have any additional questions about Max Meeting, call us at 405-948-1797 or email info@travisvoice.com