

MaX UC Mobile



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You can use your Clear Rate phone service to make or receive calls from your desk phone, PC or Mac, and mobile devices. By installing the MaX UC Mobile app, you can make business calls via your mobile phone. 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 Meetings only work on devices that have a front-facing camera.

FIND YOUR SIM AND PASSWORD

To use MaX UC Mobile you need your **Clear Rate** business SIM and password. If you don't have these, call us at **877-877-4899**. You are 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 **Clear Rate** to find the 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 **Clear Rate** as your Carrier). Then if not already present, enter your **Clear Rate** Phone Number (or Email Address if you have set this up) and 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. When asked if you have a business SIM, tap Yes.

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.

EXPLORING MAX UC MOBILE

MaX UC Mobile is like having your desk phone on your mobile. It allows you to use all the functionality of your mobile phone with some extra features.

MaX UC Mobile uses the device's native phone app for making calls while enabling a number of in-call features, such as uplifting a call to Meeting.



On Android, you can access these features directly from the native phone app using the MaX UC overlay.

On iOS, you need to open MaX UC Mobile to access these features. You can either open the app directly or tap on the notification for the call in the notification center to open the app.

Inside the app, you can use MaX UC Mobile to send messages to other people in your corporate directory who are using MaX UC (on any device). 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:

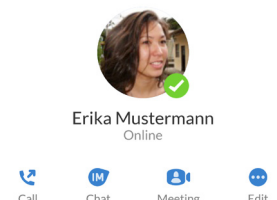
- contacts that you type into MaX UC Mobile
- contacts stored on your mobile device
- contacts in CommPortal contacts
- contacts in your corporate directory.

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.



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PHONE TAB



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

To make a call using the native phone app, tap on a contact and select the number to call or tap on the **Dialer** icon  and enter the 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.

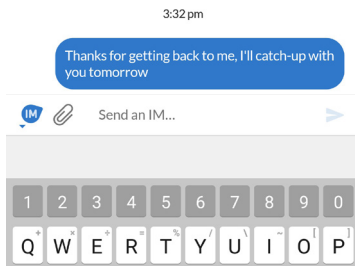
CHAT TAB



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.



You can also send messages to a contact using MaX UC during a call by tapping the IM button in the MaX UC overlay (Android) or in-app call screen (iOS).

MEETINGS TAB



Select the Meetings tab to Create or Schedule a MaX UC Meeting, Join a Meeting or view Upcoming Meetings. Unlike a call, Meetings can use both video and audio.

RECEIVING CALLS

When someone calls your **Clear Rate** number, you can answer the call normally, as you would with any phone call, using your phone's native dialer.

You can access MaX UC Mobile functions during the call through the MaX UC overlay (on Android) or by opening the MaX UC Mobile app (on iOS).

Note that if the call was transferred to you by another contact or a Multi Line Hunt Group (MLHG), the call displays the name (or number, if a name has not been set) of the contact or MLHG that directed the call to you.

DURING THE CALL

While a mobile call is in progress, you can use MaX UC Mobile to perform additional functions to the ones offered by your phone's native dialer, such as:



Show a list of your Favourite contacts



Uplift the call to a Meeting



Send an Instant Message to the subject of the call



Search for the contact being called via a CRM service



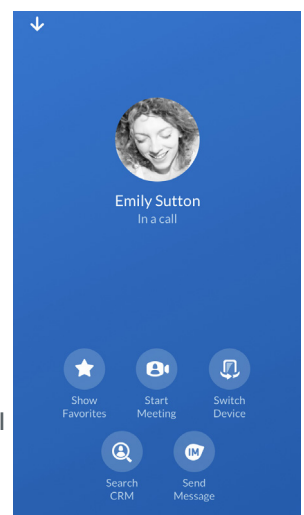
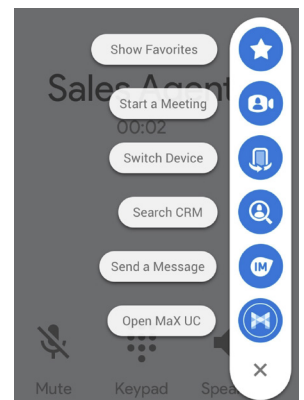
Switch the call to another device.



Transfer two calls into one another



Open the MaX UC Mobile app



On Android devices, these features are available from the call overlay, while on iOS they are only usable from the in-app call screen.

If you are in multiple calls, or in a call with an unknown number, some of these functions might be disabled. Transfer Call is only available while you are in two calls across all your MaX UC devices.

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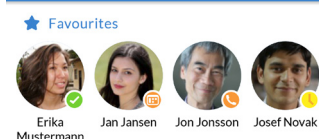
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Favorites

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, tap the Favourites icon to view your favourite contacts. Drag and drop a contact into the call window to set up a new call. You cannot call favourites when in multiple calls.

You can access the rest of your contact list by tapping the View all Contacts button at the bottom of this menu. This opens the Add/Transfer screen, from which you can set up a call with any of your contacts.

SWITCH THE CALL TO ANOTHER DEVICE

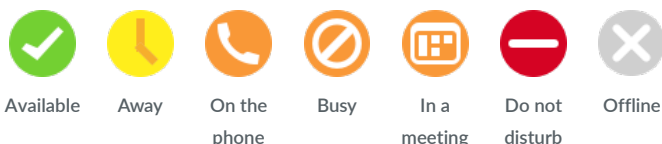
If you want to continue a call on another one of your MaX UC devices, such as your desktop or your iPad, you can use the Switch Device function. Tap the Switch Device button in the call overlay (Android) or in-app call screen (iOS) to push the call to the most convenient device.

CALL TRANSFER

If you are in exactly two calls across all your MaX UC devices, you can use the Transfer Call function. Tap the Transfer Call button in the call overlay (Android) or in-app call screen (iOS) to transfer the calls together and hang both up on your account.

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.



PROFILE & SETTINGS

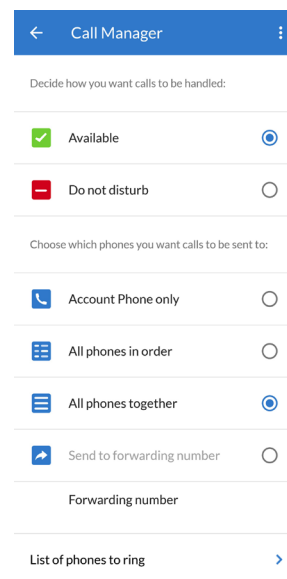
Click on your avatar in the top-right to access Account, Call, Chat, Contact, and Messaging settings and additional setup options. You can also configure your profile, send error reports and access Call Manager in the Profile & Settings window.

CALL MANAGER

You can tell MaX UC how to handle 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 ring when you have turned on 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 devices.

QUESTIONS?

If you have any questions about Clear Rate MaX UC call us at 877-877-4899 or email salesupport@clearrate.com.

