MaX Meeting
(desktop)

PHONEWARE
cloud-based telecom

QUICK START GUIDE

MaX Meeting provides audio and video conferencing over the internet, including web collaboration features such as screen sharing, whiteboard annotations, and presentation capabilities, all accessed through your MaX UC Desktop client. You can invite your contacts to join you in a Meeting, even if they don't have MaX UC Desktop!

FIND YOUR PASSWORD

You need your Phoneware phone number (or email address) and password to start using MaX UC for Desktop and Meeting. If you don't have this information, you may use the RESET PASSWORD function at the user portal login which can be found at https://phoneware.us, or you may contact Phoneware support (see end of this document).

DOWNLOAD AND INSTALL THE SOFTWARE

To download MaX UC Desktop, first log into your user commmportal at https://phoneware.us. Then navigate to DOWNLOADS, VIEW APPS, and choose MaX UC. Choose your OS, and the install program will be downloaded to your computer. Run this installer to complete the installation process. When prompted to select a carrier, choose PHONEWARE.

If you are using Outlook, also download the Outlook Calendar plugin from the commportal downloads.

SET UP A MEETING

You can choose to start an instant Meeting from MaX UC Desktop, from the CommPortal dashboard, or directly from your Outlook calendar. To start a Meeting from MaX UC Desktop:
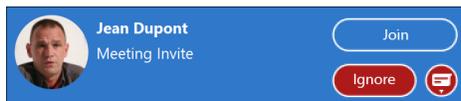
- Select the Meetings tab and then select Create.
- Select a contact and select the Start Meeting icon
- When you're in a call, select the Meeting icon to uplift the call to a Meeting.

When you start a Meeting, the Create a Meeting window allows you to select the contacts you want to join you in the Meeting. You can also select the Invite Others tab to send an email invite or copy the Meeting link to send to your contacts.

Select Start Meeting to begin the Meeting. Contacts can select the invitation to join your Meeting.

JOIN A MEETING

You can join a Meeting by selecting the Meeting invitation or opening the Meeting URL in a browser.

SCHEDULE A MEETING

You can schedule a one-off or recurring Meeting.

- In MaX UC Desktop, select the Meetings tab and select Schedule.
- Select Schedule A Meeting from the CommPortal dashboard, or directly from your Outlook calendar.

In the Schedule A Meeting window, you can set the date, time, and length of the Meeting, set up audio and video options, and optionally set a password for participants. Select Save to schedule the Meeting. A template email opens in your default email application. Customize the email text and send the email to the contacts you want to invite to the Meeting.

EXPLORE THE MEETING WINDOW

While a Meeting is in progress, you can either see the participant toolbar or the host toolbar at the bottom of the Meeting window.

**Participant toolbar:**

Host Toolbar

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SET UP YOUR AUDIO AND VIDEO

Select Join Audio to allow Meeting to use either your phone or your computer's microphone/speaker or a connected headset. Select Leave Audio to prevent Meeting from using your speaker and audio device.

During a Meeting, use the Mute/ Unmute icon to toggle your microphone on and off. Select the drop-down menu next to the Mute icon and select Audio Settings to set up and test your microphone and speakers.
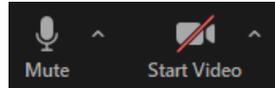
Use the Start Video/Stop Video icon to toggle your video on and off. Select the drop-down menu next to the Video icon and select Video Settings to set up your video. You can also expand the menu next to the Video icon and select Choose Virtual Background or Choose Video Filter to disguise the background in your video or enhance the video's appearance. Note: Your Service Provider must enable Virtual Backgrounds and Video Filters. These features are only visible to Meeting participants if they are set up by the Meeting host in Advanced Settings.

SECURITY

The Meeting host can select the Security icon to access the following Meeting setup options.

- Lock Meeting. Lock/unlock the Meeting to new participants.
- Enable Waiting Room. Enable/disable the waiting room.
- Toggle whether participants can Share Screen, Chat, Rename Themselves, and Unmute Themselves.

INVITE CONTACTS AND VIEW PARTICIPANTS

Select the Participants icon to see who has joined the Meeting. You can access the following options from the Participant window.
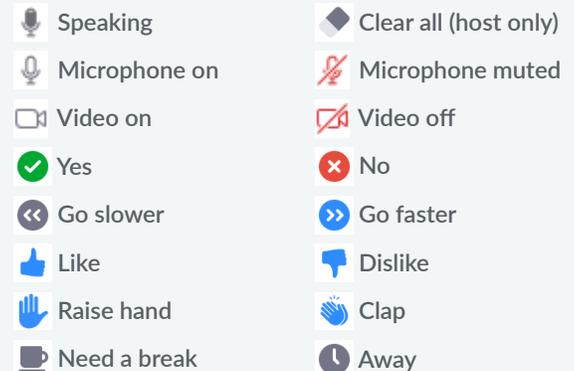
- Mouse over your name to mute/unmute yourself. Select More to change your display name or edit your profile picture.
- Meeting Hosts can mouse over a participant and select More to access: Ask to Start Video, Make Host/Co-Host, Rename, Put in Waiting Room, and Remove.
- Invite. Select the contacts you want to invite to join you in the Meeting. The contacts you select are then sent a Meeting invitation.
- Mute Me. Put yourself on mute. Meeting hosts can Mute All or Unmute All participants.

Select the More icon to access the following options:
- Reclaim host. Take back the role of Meeting host.

The following icons provide additional information about Meeting participants.

🎤 Speaking	🔷 Clear all (host only)
🎤 Microphone on	🎤 Microphone muted
📹 Video on	📹 Video off
✅ Yes	❌ No
⏪ Go slower	⏩ Go faster
👍 Like	👎 Dislike
✋ Raise hand	👏 Clap
☕ Need a break	🕐 Away

Meeting hosts can see the following options:

- Ask All to Unmute.
- Lower All Hands.
- Mute All Upon Entry.
- Play Join and Leave Sound.
- Play Chat Messages and Raise Hand Sound.
- Lock Meeting. No new attendees can join if the Meeting is locked.
- Enable Waiting Room. New participants are put in a waiting room when they enter the Meeting. The host must manually admit participants.
- Allow Participants to: Unmute themselves, Rename, Start Video.

On Windows OS, select an icon at the bottom of the Participants window to send non-verbal feedback. On macOS, the non-verbal feedback icons are part of the Reactions menu.

✋ raise hand	✅ yes	❌ no	⏪ go slower	⏩ go faster	⋯ more

SEND A MESSAGE TO MEETING PARTICIPANTS
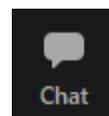
Select Chat to open a Chat window and send a message to another Meeting participant. Select the More icon ⋯ to access the Save Chat option and (for Meeting hosts) select whether participants can chat with No One, Host Only, Everyone Publicly, or Everyone Publicly and Privately.
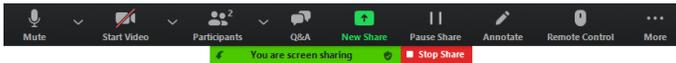
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SHARE YOUR SCREEN

 Select **Share Screen** and choose the desktop or individual application that you want to share.

Once you are screen sharing, you can see the following toolbar.

The Screen Share toolbar provides the following options:

– **New Share.** Select a new window or application to share.

– **Pause Share/Resume Share.** Pause or restart screen sharing.

– **Annotate.** Opens the **Annotation Toolbar** to annotate your shared screen using a variety of shapes and highlight tools.


*Note: The **Annotate** option may not be visible if the host selects Disable Participants Annotation.*

– **Remote Control. Auto accept all requests** for remote control or **Give Mouse/Keyboard Control** to specific users in the Meeting.

– **More.** Access **Chat, Breakout Rooms, Record, Meeting Info, Disable Annotation for Others, Hide Names of Annotators, Hide Floating Meeting Controls, Share computer sound, Optimize Share for Full-screen Video Clip,** and **End.**

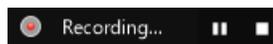 Select **Stop Share** to exit screen sharing.

RECORD YOUR MEETING
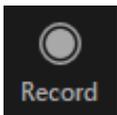
 Select **Record** to start recording the Meeting.

Select **Pause/Resume** on the toolbar or at the top left of the screen to pause or resume the recording. Select **Stop** to end the recording.

When the Meeting ends, you see a pop-up saying that the Meeting recording is being saved and converted to mp4 format.


The directory containing the saved recording automatically opens showing the recorded file, and the Meeting also appears in your list of recorded Meetings within the Meeting application.

You can specify the directory to save recorded Meetings to using the **General** tab in the Meeting **Options** window.

*Note: The **Record** option may not be visible if the Meeting host has disabled recording for the Meeting.*

BREAKOUT ROOMS
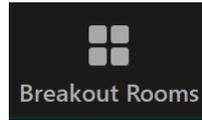
 The Meeting host can select **Breakout Rooms** to split the Meeting into separate rooms, allowing groups to work separately before returning to the main Meeting.

In the **Create Breakout Rooms** window, select the number of Breakout Rooms you want to create. Tick **Automatically** to evenly split your participants into the number of rooms or **Manually** to assign specific participants to each room.
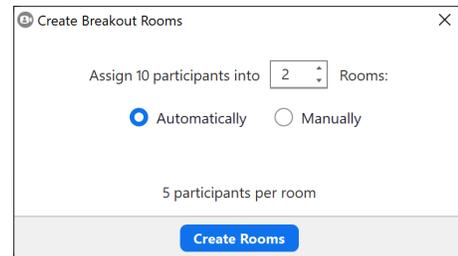

Select **Create Rooms** and use the on-screen options to prepare the Breakout Rooms. Select **Open All Rooms** to start the Breakout Rooms. Participants move to their assigned Breakout Room once they accept the on-screen Breakout Room prompt.

While Breakout Rooms are in progress, the host can select **Join room** or **Leave room** to move between Breakout Rooms. The host can also rename rooms, broadcast a message to all rooms, and move Meeting participants between rooms. Close All Rooms stops all Breakout Rooms after a 30 second countdown and returns all participants to the main Meeting.

REACTIONS

Select **Reactions** and:

– Choose an emoji to display on your video for ten seconds.

– On macOS, select an icon to provide non-verbal feedback to the Meeting Host. The icon displays on your video and opposite your name in the Participants panel until dismissed. *On Windows OS, you can find the non-verbal feedback icons at the bottom of the **Participants** window.*
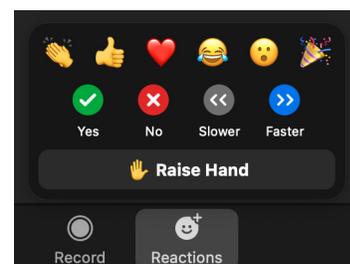
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ADDITIONAL OPTIONS

Enter Full Screen extends the Meeting display to full screen.

Exit Full Screen exits the full-screen display.

Gallery View shows all participant's videos.

Speaker View shows the video for the person speaking.

Select the **Information** icon to view the Meeting ID, Host, Invitation URL, and Participant ID.

A shield shows that the Meeting is encrypted.

A green shield shows that the Meeting is using enhanced encryption.
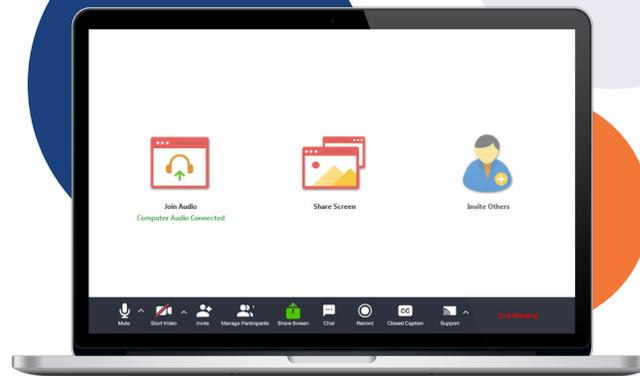
LEAVE THE MEETING

Leave — Participants can select **Leave** to leave the Meeting.

End — The Meeting host can select **End** then:

- **Assign and Leave** to assign a new host after leaving the Meeting.
- **End Meeting for All** to end the Meeting for all participants.

MORE QUESTIONS?

If you have any additional questions, please contact us:

- via email: support@phoneware.us
- via phone or text message: (602) 445-7777
- via web chat: https://phoneware.us