Zultys Advanced Communicator (ZAC) 9.4 User Manual

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Revision History

Date/Revision	Comments
October 2023/Revision P1	Initial release internal pre-EA review
April 2024/Revision 1	GA release. ZAC 9 Features added
November 2024/Revision 2	GA release ZAC 9.2 features added
June 2025/Revision 3	GA release ZAC 9.4 features added – sec 20, sec 2.1updated for SSO support,

Getting Started

1.1 Description

Zultys Advanced Communicator (ZAC) is a Unified Communications client that provides an easy to use interface to access all capabilities of the MX system.

1.2 PC Requirements

- **Version** – Windows 10 (64-bit), Windows 11 (64-bit)
- **RAM** – 256 MB standard
- **Processor** – 1 GHz minimum
- **Hard Drive Space** – 200 MB

1.3 Macintosh Requirements

- **Version** – OS X v10.13 or higher
- **Hard Drive Space** – 400 MB

1.4 Other Requirements

- MX software version 18.4.x is recommended for full functionality/compatibility.
  Version 17.0.10 is the minimum supported MX version. Not all ZAC 9.4 features are available when running ZAC 9.4 on an 18.0.4 or 17.0.10 MX system.
- Security certificate installed on the MX
- ZAC license for each user
- TCP Ports 443, 7778, 7779 and UDP Ports 33000-35000 open or mapped to the MX if behind a firewall
- MX must be able to access stn.zultys.com:3478 for screensharing and softphone to operate

1.5 What's new in ZAC 9.4

- Flex application incorporated into ZAC
- ZoHo click to call via TEL link
- Single Sign On (SSO) support
  Please refer to the MS Entra ID SAML Single Sign On Manual for configuration information.

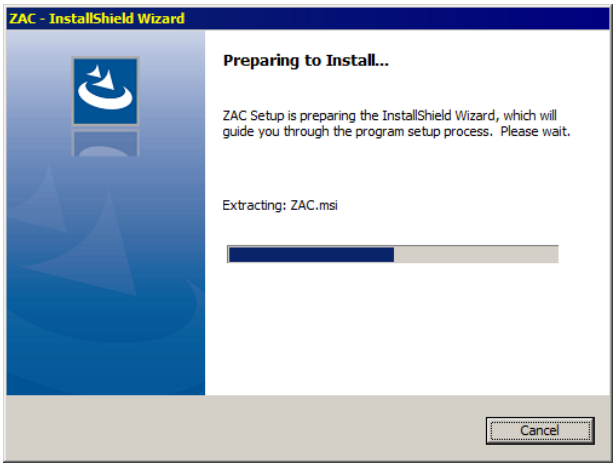
You may jump directly to the new features section here:

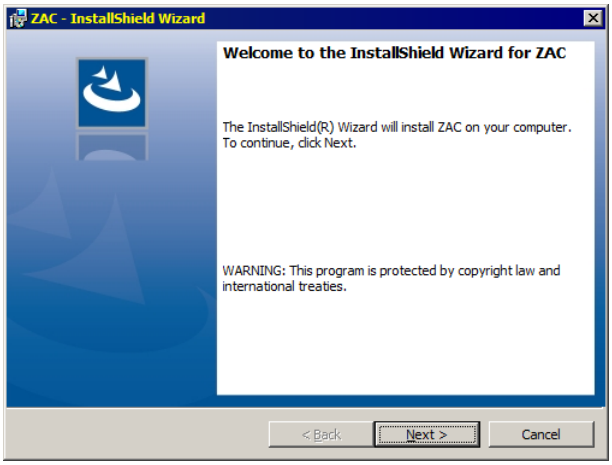
ZAC 9.4 Features

1.6 Installation

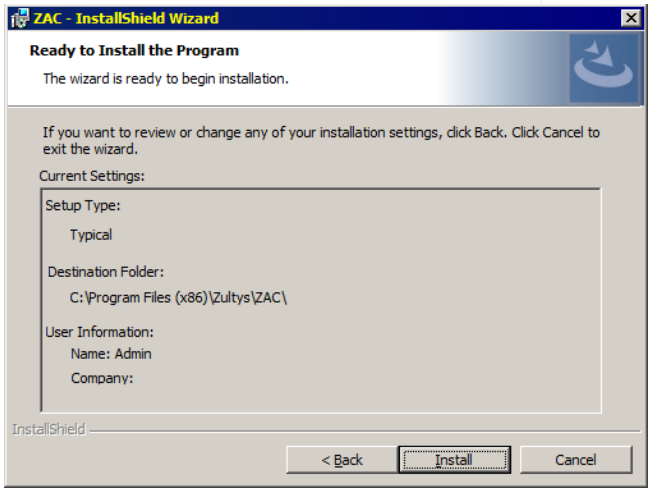
1.6.1 PC

- Double click the download ZAC installation file. The installation process will begin.



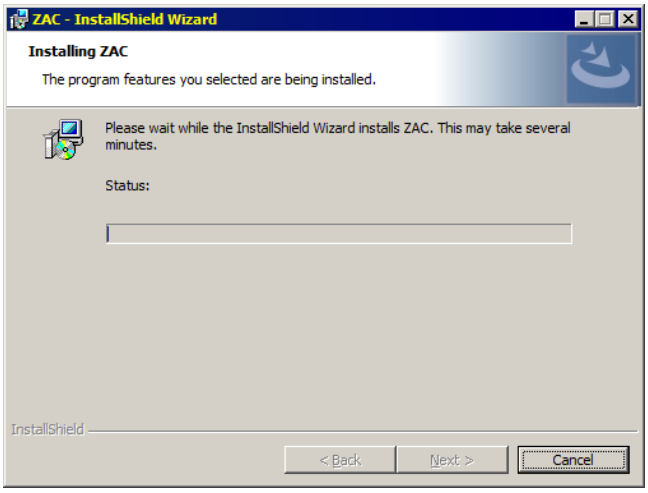


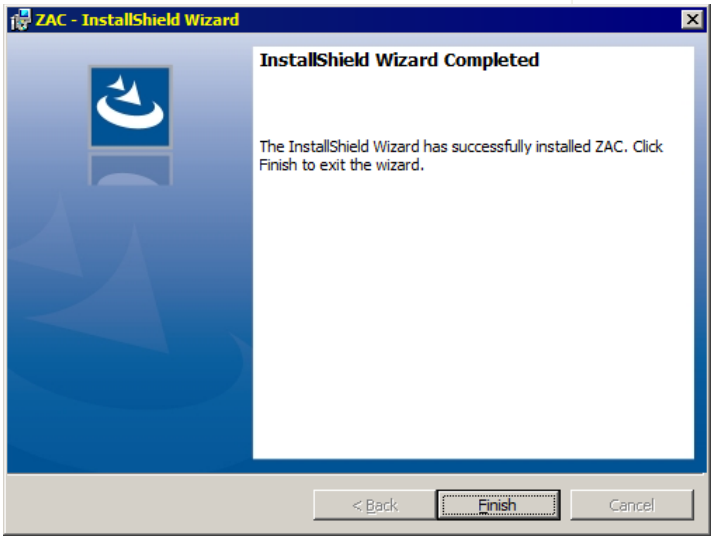
- Click the Next button to continue



It is recommended to leave the default installation settings.

- Click the Install button.





- Click the Finish button to completer the installation.

1.6.2 MSI Installation

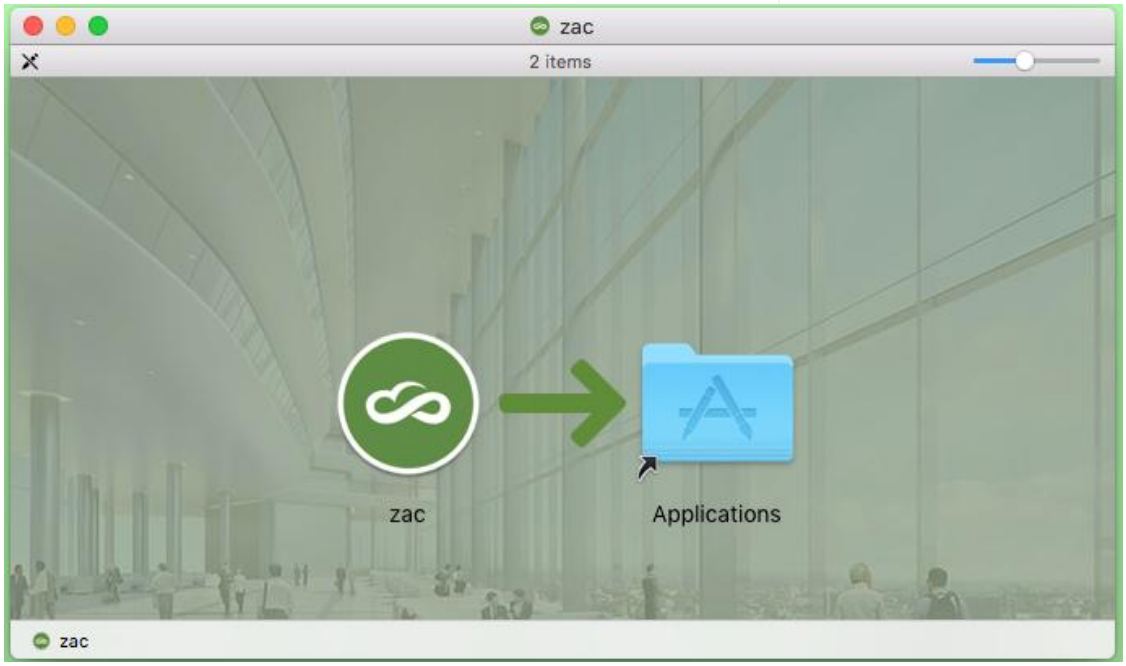
The ZAC installer contains .MSI logic that will facilitate group policy scripts for installation. This allows the ZAC installer to work silently from the command line parameter. An example of parameters:

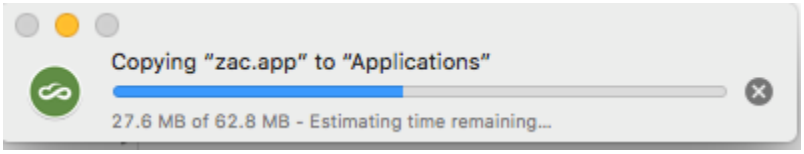
"**C:\Users\xxxxxxxxx\Desktop\ZAC_x64-9.4.11.0.exe /S /v/qn** "- Install

"**C:\Users\xxxxxxxxxx\Desktop\ZAC_x64-9.4.11.0.exe /S /x /v/qn**" – Uninstall

1.6.3 Macintosh

- Open the DMG file after downloading it.
- Drag the program icon into the Applications folder





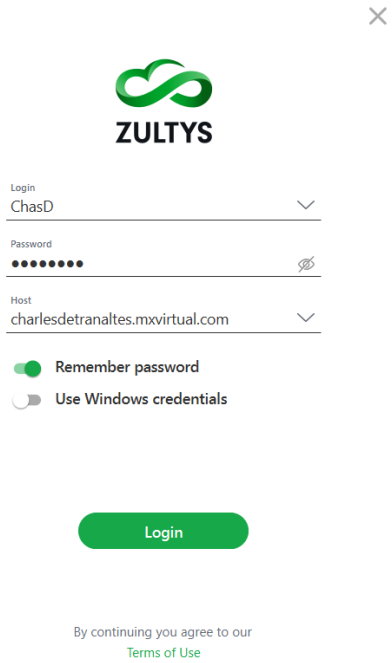
You may then open ZAC from the Applications folder.

Note: This process does NOT create an Alias in the Macintosh Dock at the bottom of the screen. The user will need to do that themselves.

2 Operation

2.1 Login Screen

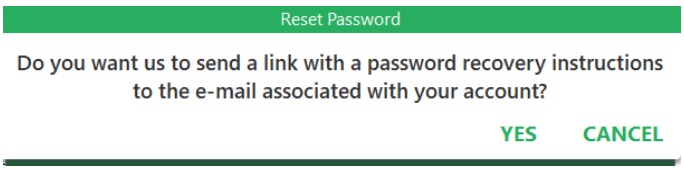
When you first start the program, the login screen will appear. You will need to enter your login information in order to login to the program.



- Enter your user name, password and the MX system address/domain name.

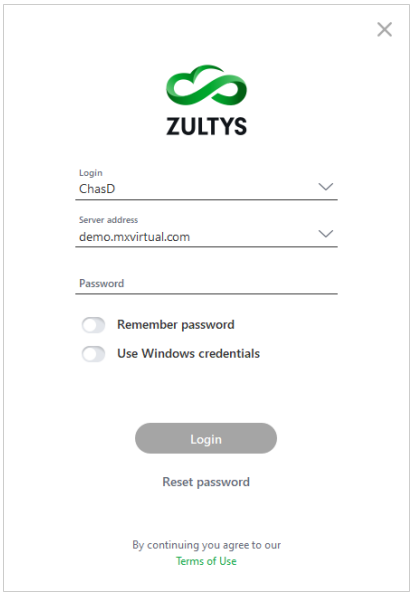
  You may also select Remember password to avoid re-typing each time.

- If you wish to utilize LDAP, enable the Use Windows Credentials and enter your Windows login/password information.
  Macintosh users can also utilize LDAP credentials for logging in.
- If you cannot remember or want to change your password, click the Reset password link to start the process if the link is visible.
  Click Yes to have an e-mail sent to you with password reset instructions.

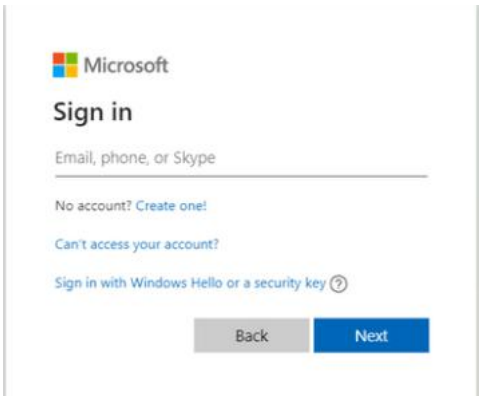


2.1.1 SAML Single Sign On (SSO)

- When logging in for the first time the login screen will initially prompt you to enter your 'Login' Username and the 'Server address' (IP address or domain name) of the phone system. Enter the details as advised by your system administrator.
- Upon pressing 'Continue' you will either be prompted to enter your password or taken to an additional login screen depending on how the system administrator has configured your user account. Complete the relevant steps.



- Example of secondary login screen if using SAML based Single Sign-On

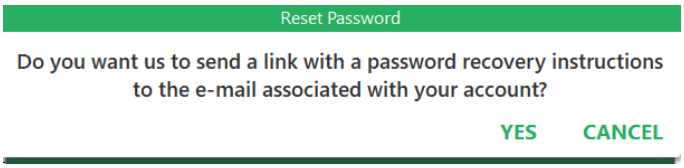


For system-based or LDAP password you may select Remember password to avoid re-typing each time.

- If you wish to utilize your Windows Credentials, enable the 'Use Windows Credentials' option and enter your Windows login/password information.
  Macintosh users can also utilize LDAP credentials for logging in.

- If you cannot remember your password or wish to change it and a 'Reset password' link is visible, click the link to start the process.

  Click Yes to have an e-mail sent to you with password reset instructions.



- Click Login to proceed

For system-based or LDAP password you may select Remember password to avoid re-typing each time.

- If you wish to utilize your Windows Credentials, enable the 'Use Windows Credentials' option and enter your Windows login/password information.
  Macintosh users can also utilize LDAP credentials for logging in.

- If you cannot remember your password or wish to change it and a 'Reset password' link is visible, click the link to start the process.

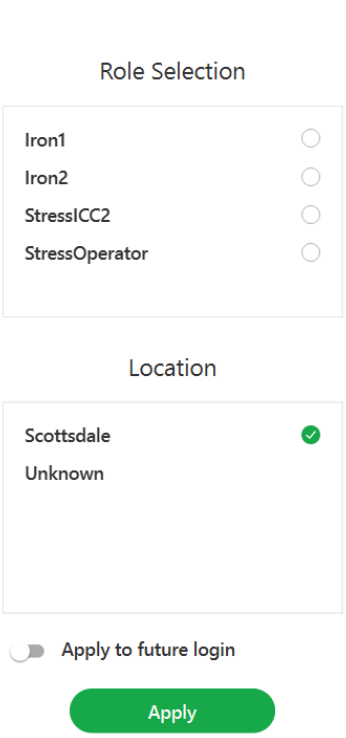
  Click Yes to have an e-mail sent to you with password reset instructions.

  Login screen with password field that will be displayed when using a system-based or LDAP password. This will become the first login screen for subsequent logins when using this method.

2.1.2 Logging in Call Groups

If you are a member of a call group, you will be prompted to select any group role for which you are a member of.

- You may also select the desired location to log into as well.

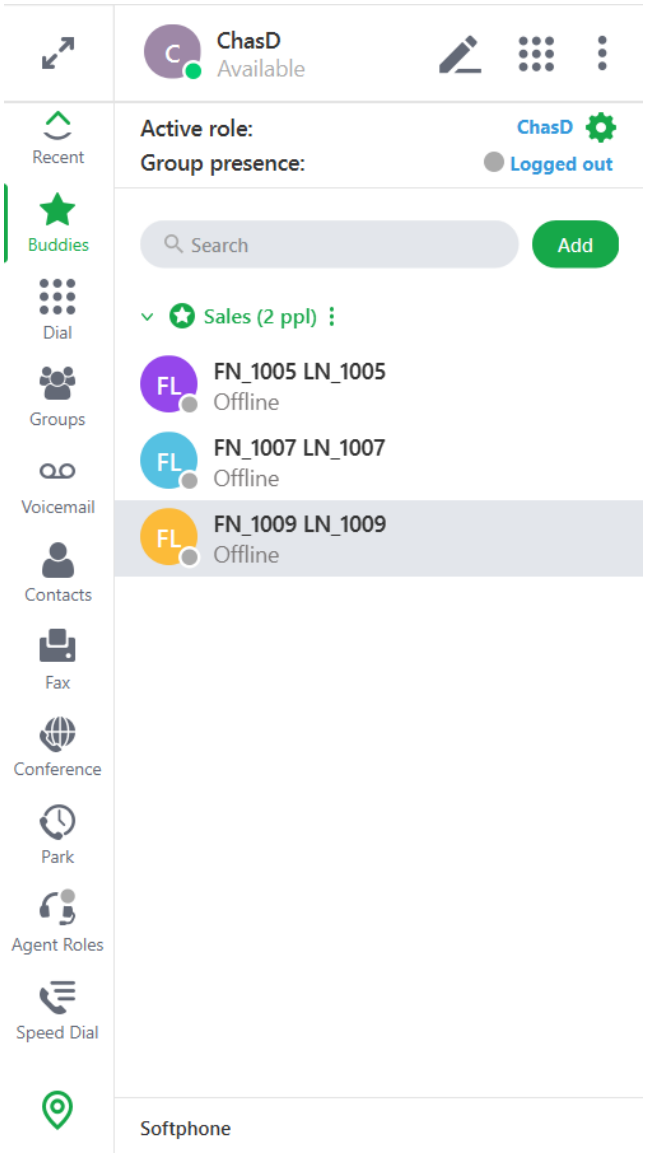


You may select any or all roles you want to login to. If you want to always login to specific roles and a specific location, click the Apply to future login checkbox.

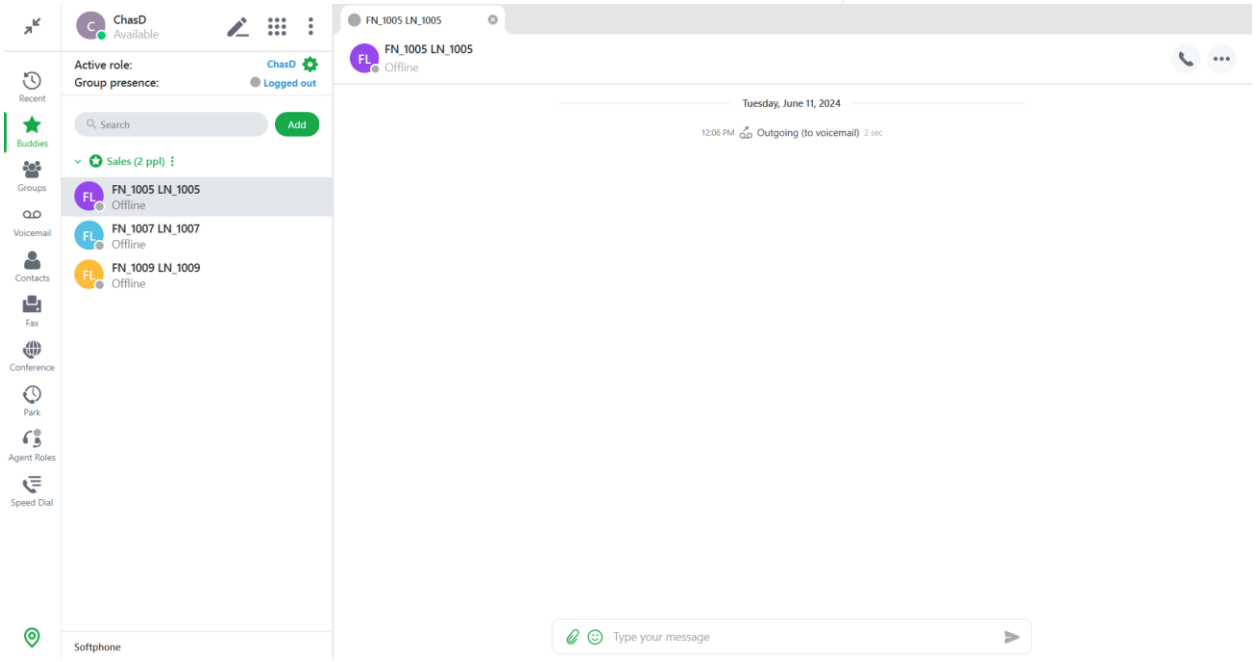
- Click Apply to login to ZAC.

2.2 Main Screen

Once you have logged in, the main screen will appear. ZAC has two basic screen layout options, compact mode or full screen mode.

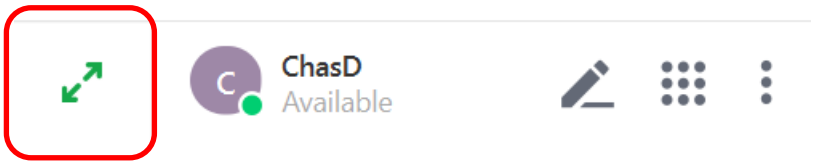


Compact mode

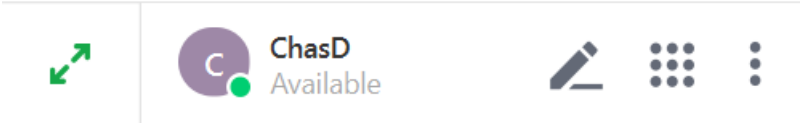


Full screen mode

To toggle between the two modes click the resize icon in the top-left corner

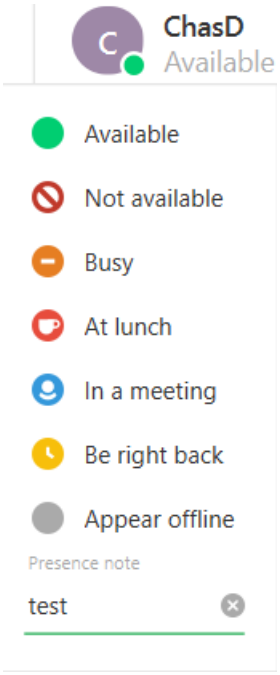


2.2.1 Presence Indicator/selector

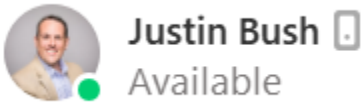


You may click on your current presence state to drop down the presence menu. Below the presence selection is an area to include a note that will be seen by users in addition to your presence state.

- Select the desired presence from the list.
- Type a note and press ENTER to save the note. You may click X to clear the note entry and retype.
- To delete a note remove the note and press ENTER.



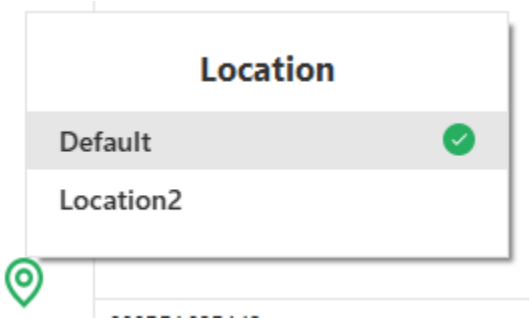
Users who are also logged into Zultys MX Mobile will have their presence as well as a mobile phone indicator displayed.



2.2.2 Locations

You may select which location you want to be logged into using the locations icon. Locations are configured on the MX system and determine how your emergency calls will be processed. Please consult with your administrator on which location you should select.

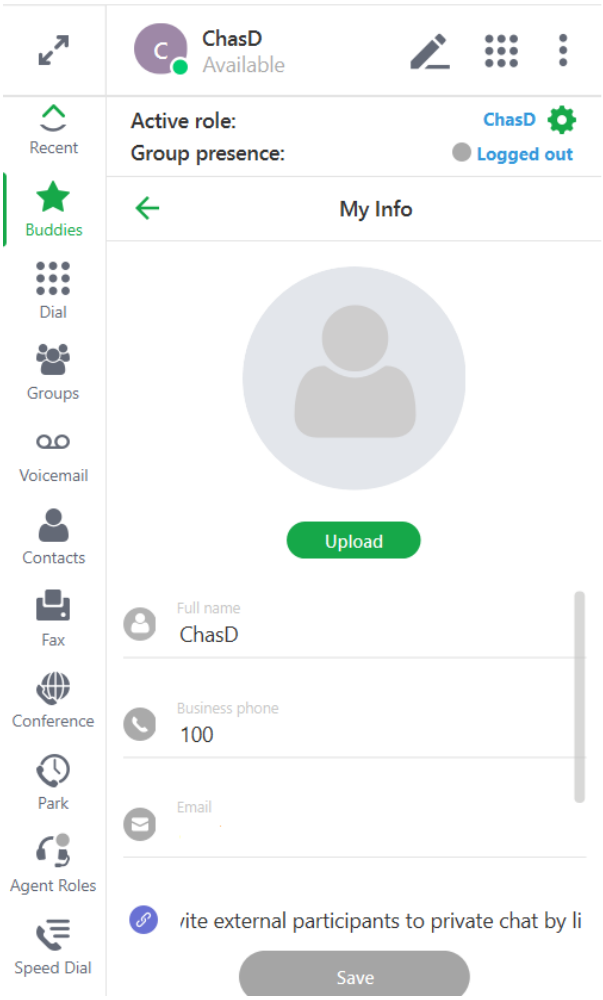
- Click the location icon and select the desired location.



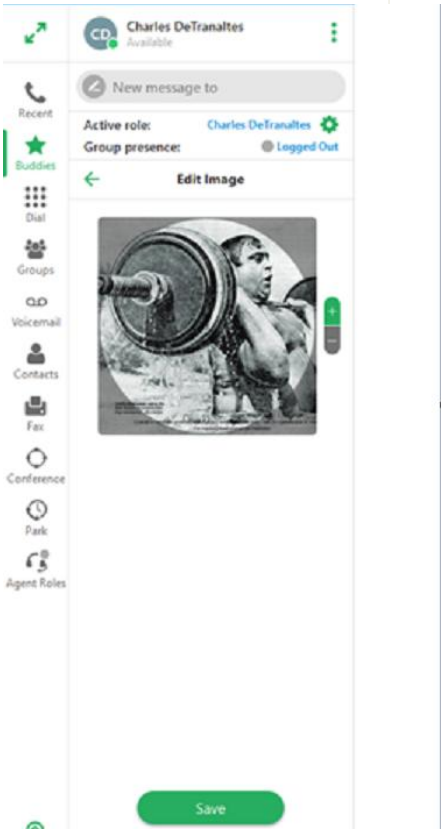
2.2.3 User Information/Image

You may add an image that can be associated to you. You may also add/edit your contact information in this area as well.

- Click your name in the presence indicator bar. The My Info screen will appear.



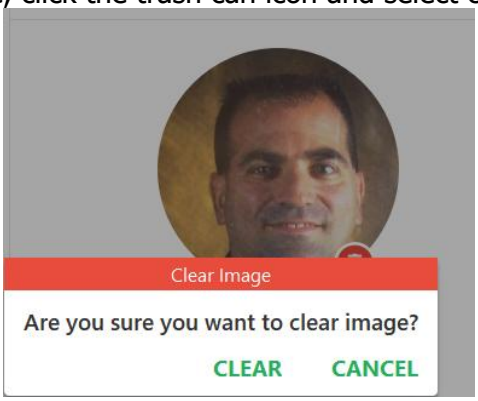
- Click the Upload button. The File Explorer window will open. Navigate to the location where your desired image is stored and double click on the image.



You may size the image using the controls to the right of the image.

- When you are finished, click Save.

- To clear an existing image, click the trash can icon and select clear.



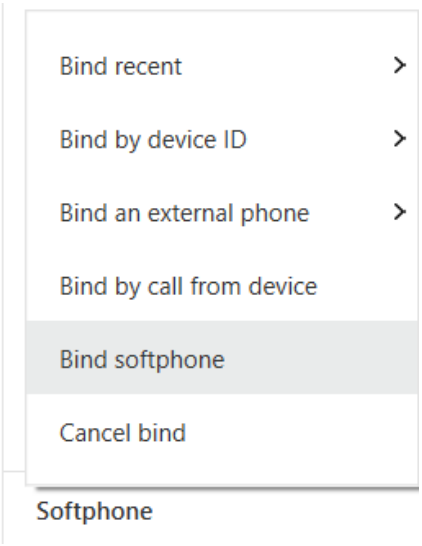
You may edit your contact information:

Full name
Mobile phone
Home phone
e-mail

2.2.4 Bind Area

ZAC can initiate voice calls and handle multiple voice calls through Zultys ZIP phones, generic SIP devices, external numbers or the internal softphone to which it is bound. ZAC instances can be bound to only one device at a time. The Bind window is used to select which device should be bound to ZAC.

- To access the Bind window click the Bind to or current device in the lower left corner of ZAC. A drop down menu will appear.

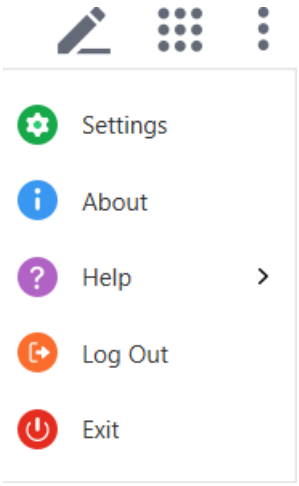


- **Bind Recent**: This option allows you to select from a menu of devices and registered contacts to which your ZAC was recently bound.
- **Bind Device by ID**: This option binds your ZAC instance to an MX managed device. When entering the MAC address, make sure you utilize **upper case** for any letters in the MAC address.
- **Bind to External Phone**: This option allows you to bind to a Cell Phone, Home Phone Line.
- **Bind by call from device**: This option binds your ZAC instance to an MX managed device that you designate by making a voice call.
- **Bind softphone**: This option binds your ZAC instance to the ZAC internal Softphone. You can bind only one instance to the Softphone.
- **Cancel bind**: This option cancels the current binding leaving ZAC with no bound device.

2.3 Option Menu

This menu contains the About screen, Setup screen, Log off function, and the Exit function.

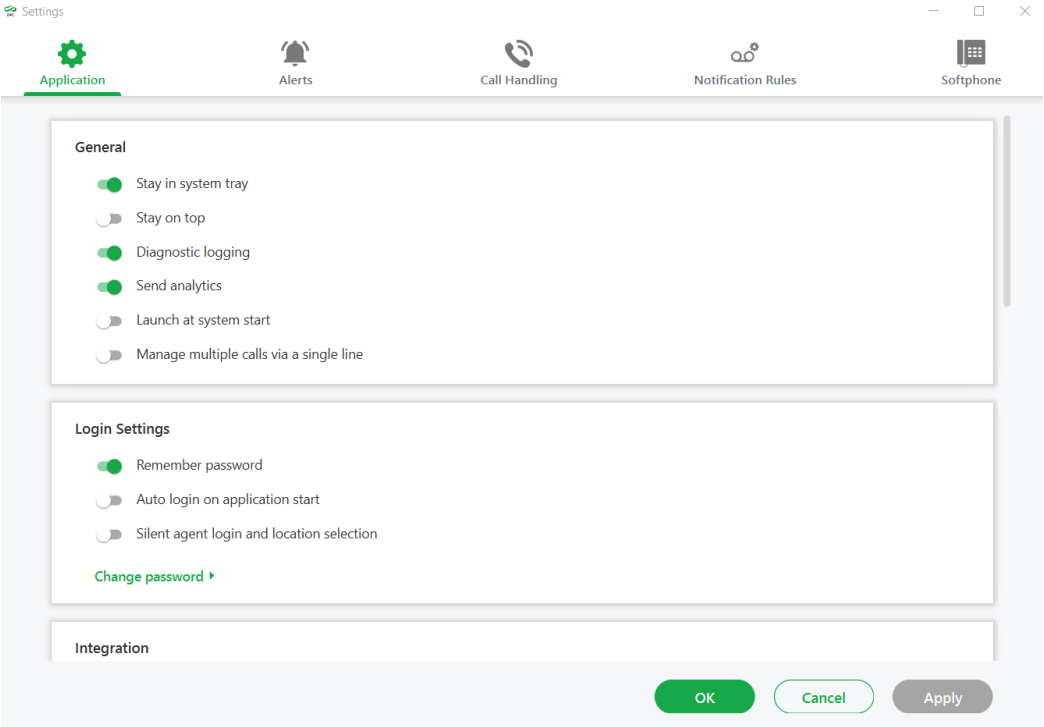
- It is accessed by clicking on the icon in the upper right corner.



- **Settings –** Provides access to programmable areas that users can customize. See Settings Menu section of this document for more details.
- **About –** Displays the version number of the program
- **Help –** Allows the user to report an issue with the application. A report form will present for the user to enter information about the issue.
- **Log Out –** This will log you out of the program but keep the program open. You must login again to utilize the program.
- **Exit –** This will close the program and log you off of the system.

2.3.1 Settings Menu - Application

- **General**



Stay in system tray – This option determines if the program logs the user off and closes if the X in the menu bar is pressed. If the option is enabled, the user/program remains and the program minimizes to the system tray. If the option is disabled, the pressing the X will exit the program.

Stay on Top – This setting allows the program to remain on the screen and in focus.

Diagnostic Logging – This enables the diagnostic log which is used by Zultys Technical support.

Send Analytics – Sends diagnostic information regarding the application.

Launch at System Start – This setting will start the program anytime the computer starts.

Manage multiple calls via single line – This setting determines how multiple calls are handled. The default setting is to have ZAC manage multiple calls through the ZAC interface. Disabling this setting creates a *Manage via device* and you will not be using ZAC call control features, but will use all the call control features of the device itself.

- **Login Settings**

Remember password –When the "Remember password" is unchecked, "Auto login" option should is unchecked and disabled as auto login is not possible without a stored password.

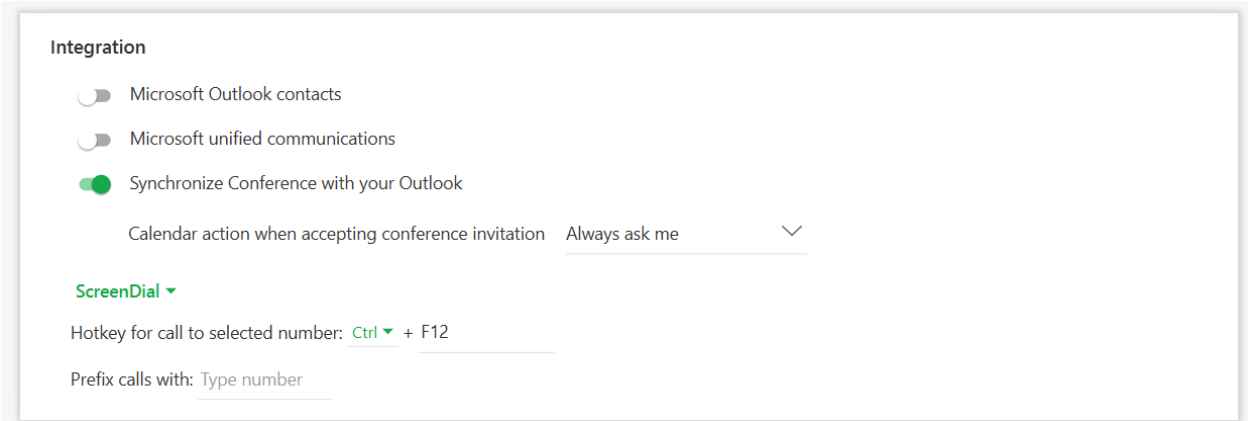
Auto Login on application start – This will perform an automatic login when the program is started.

Silent Agent login – This setting will log the user in and have their call group roles activated when the program starts. This bypasses the user having to select the role each time at startup.

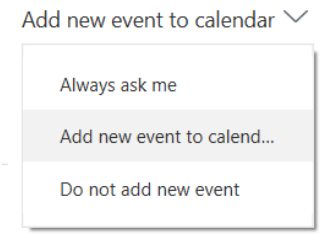
Change password – This allows you to change your user password. Click the icon. You then need to enter your old, new and then confirm the new password.

- **Integration**

This area allows you to select Outlook Contacts (32/64 bit), Microsoft Unified Communications (see section **12**), as well as the settings for the screen dial feature.
If you enable Outlook Contacts, Outlook contacts will display in the Contacts/Imported area.



You may also select if a ZAC conferences are synchronized with Outlook and what action should happen when you do:



Note: Outlook contact and Unified Communications are supported on Windows version only

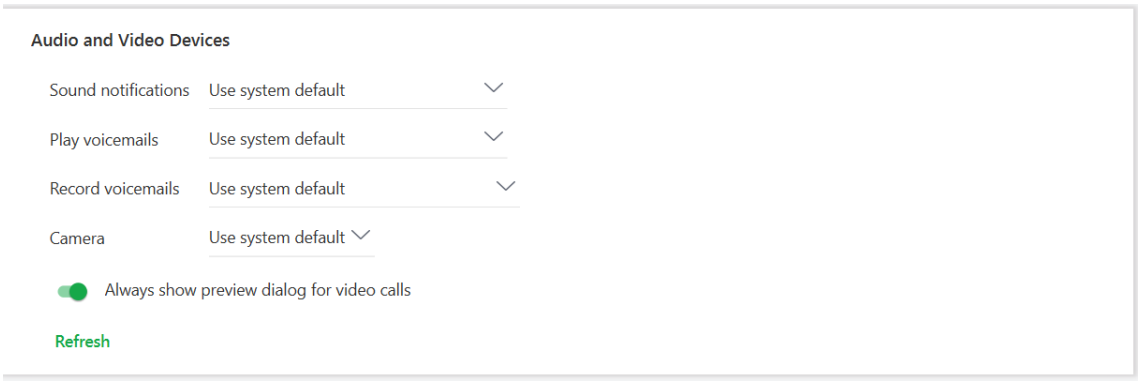
NOTE: ZAC synchronizes the default account Contacts folder (what is shown under My Contacts | Contacts folder in the People tab in Outlook), its' subfolders and from any Public Folders(if present).
If contacts are located in any other local folders different from the default Contacts, those contacts are not integrated into ZAC.

ZAC 8.0: allows synchronization of contacts from non-Exchange profiles (IMAP/POP) as well as synchronization of contacts from any Outlook (Exchange) folder containing contacts.

Screen Dial - You may define the hotkey combination that will be used to activate the ScreenDial feature. In addition, you may add a prefix to use with the screen dial feature. This is the number that will be inserted prior to the highlighted screen dial number to be dialed before making the call. By default, (CTRL+F12 on Windows, Command+F12 on Macintosh) invokes the ScreenDial feature.

- **Audio and Video devices**

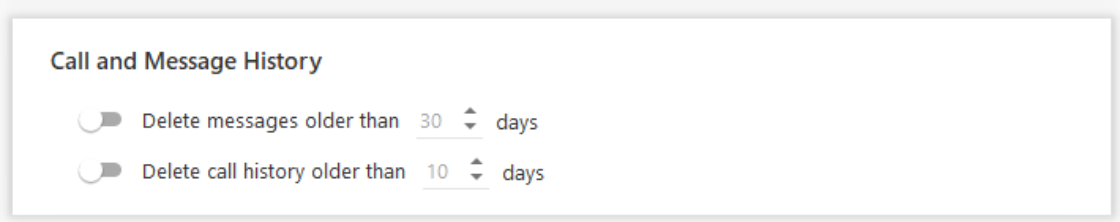
This area allows the selection of the audio/video devices on the PC that can be used for program audible notifications of various events. This area is also used to select headset audio devices connected to the PC. The camera selection allows you to specify which video device to utilize for video calling.



- **Call and Message History**

Delete messages older than - You may define the amount of time to store instant messages. Messages older than the specified number of days will be deleted automatically.

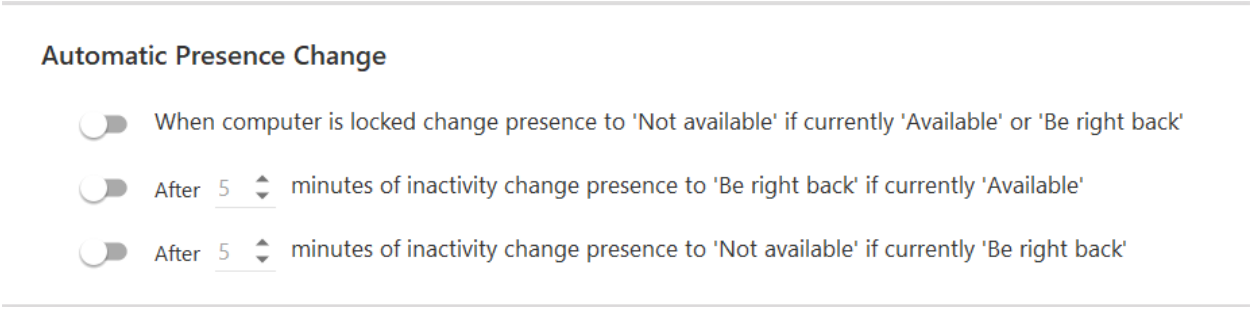
Delete call history older than – You may define the amount of time to store your call history data. Data older than the specified number of days will be deleted automatically.



- **Automatic Presence Change**

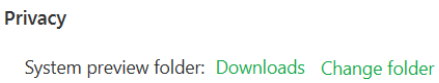
You may define how the application should automatically change presence based on several conditions:

- Change presence if computer is locked
- Change presence from Available to Be right back after a programmable time period of inactivity.
- Change presence from Be right back to Not Available to Be right back after a programmable time period of inactivity.

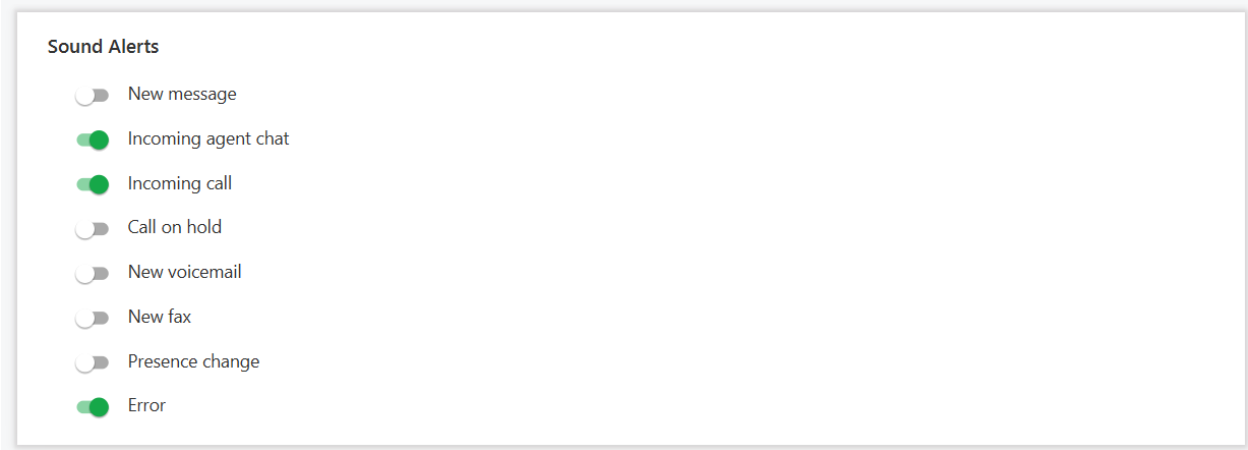


- **Privacy**

You may define where files you download in the application will be stored. For security, network drive paths can be configured.



2.3.2 Settings Menu - Alerts:

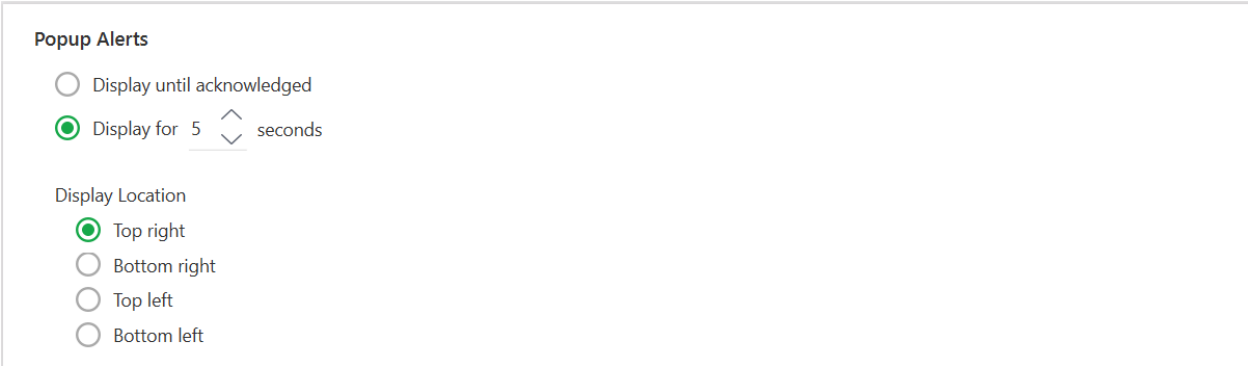


- **Sound Alerts**

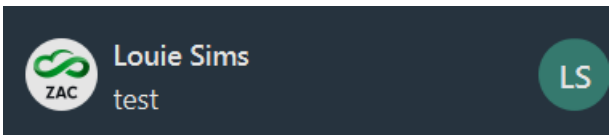
Allows you to select which actions have an audible alert associated with them.

- **Popup Alerts**

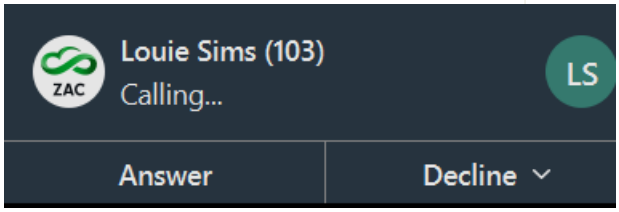
This allows the selection of actions associated with popup events. The duration and display location of popup alerts can be programmed here.



Please note that incoming call popups will remain until the call is answered, rejected, or the caller hangs up. The duration parameter does not apply to incoming calls.

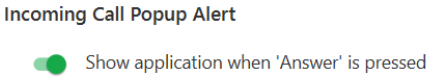


Popup alert for a message



Popup alert for incoming call

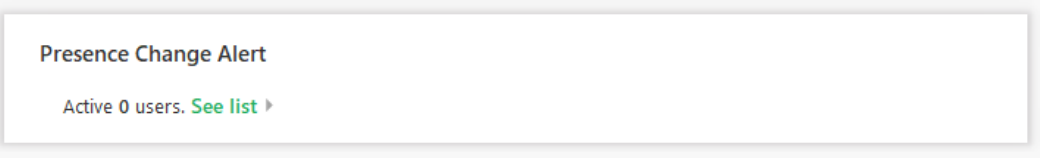
Incoming Call Popup Alert - This setting allows you to present the application while the call is ringing or only after the call was answered.



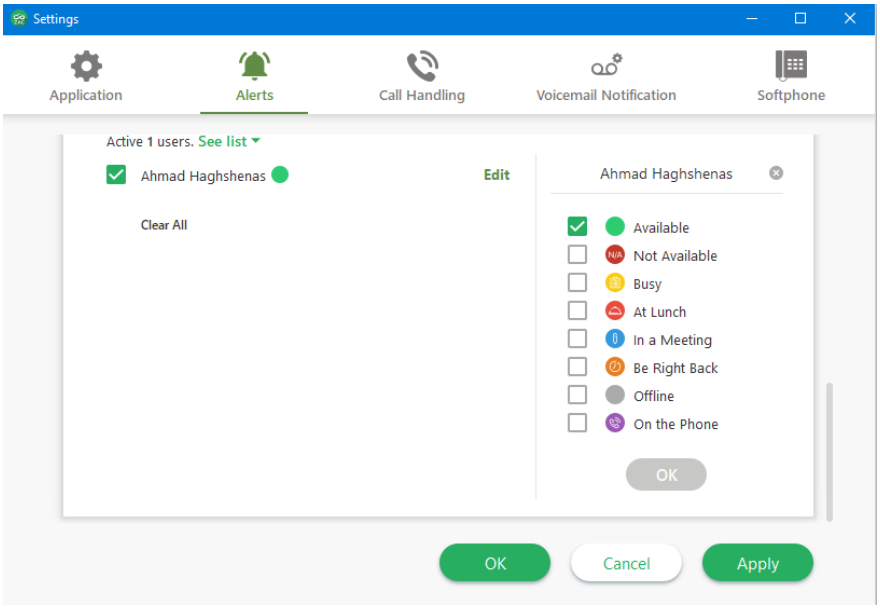
- **Presence Change Alert:**

This area is where all active Presence Change Alerts can be viewed, cleared, and edited.

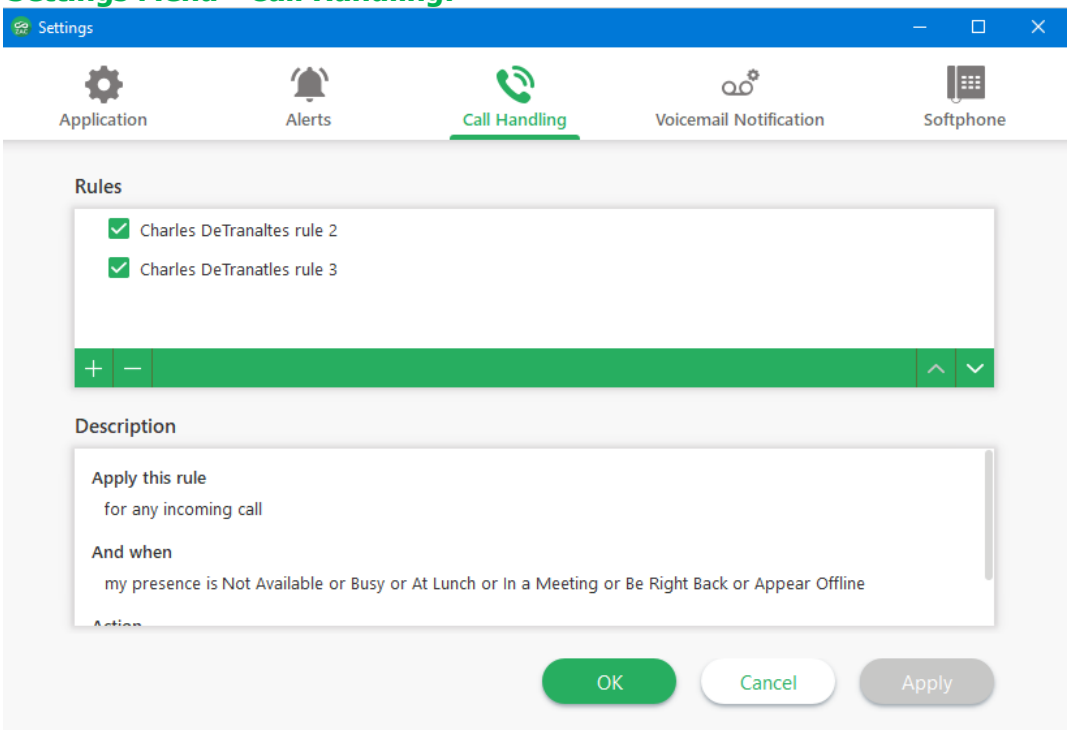
Click See List to view all active change alerts.



You may edit any or clear all active alerts by clicking the See list text:



2.3.3 Settings Menu - Call Handling:



This area allows you to setup individual call handling rules to control how calls are handled under different conditions. Rules can be created, edited, or deleted in this area. Call handling rules manage incoming calls that you do not answer.

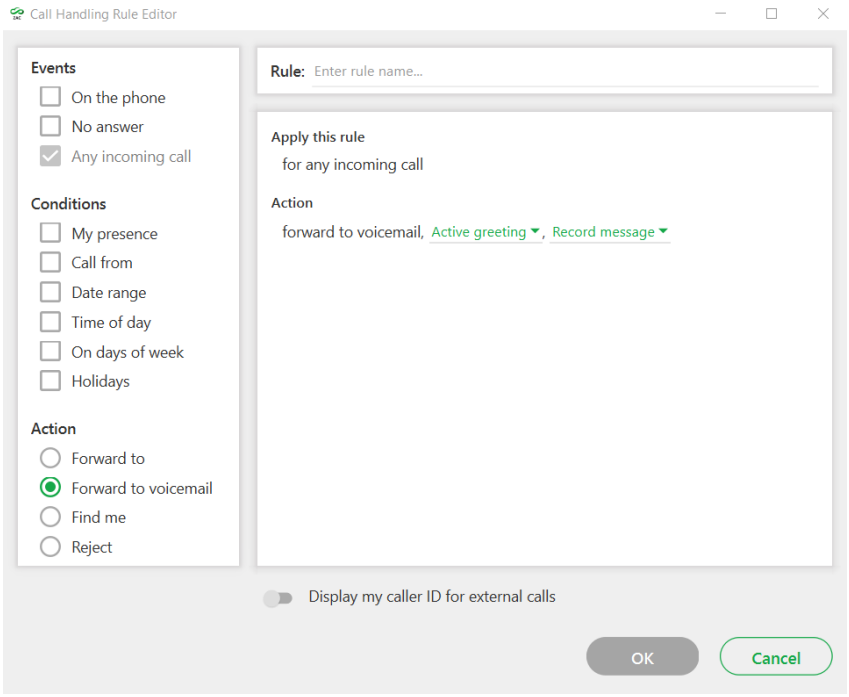
To add a new rule, click the icon at the bottom of the Rules area.

To delete an existing rule, highlight the rule and click the icon at the bottom of the Rules area.

After creating a new rule or to edit a rule (double click the rule), the call rule editor window will appear.

You may also enable/disable an existing rule by clicking the checkbox next to the rule .

Adding or editing a call handling rule:



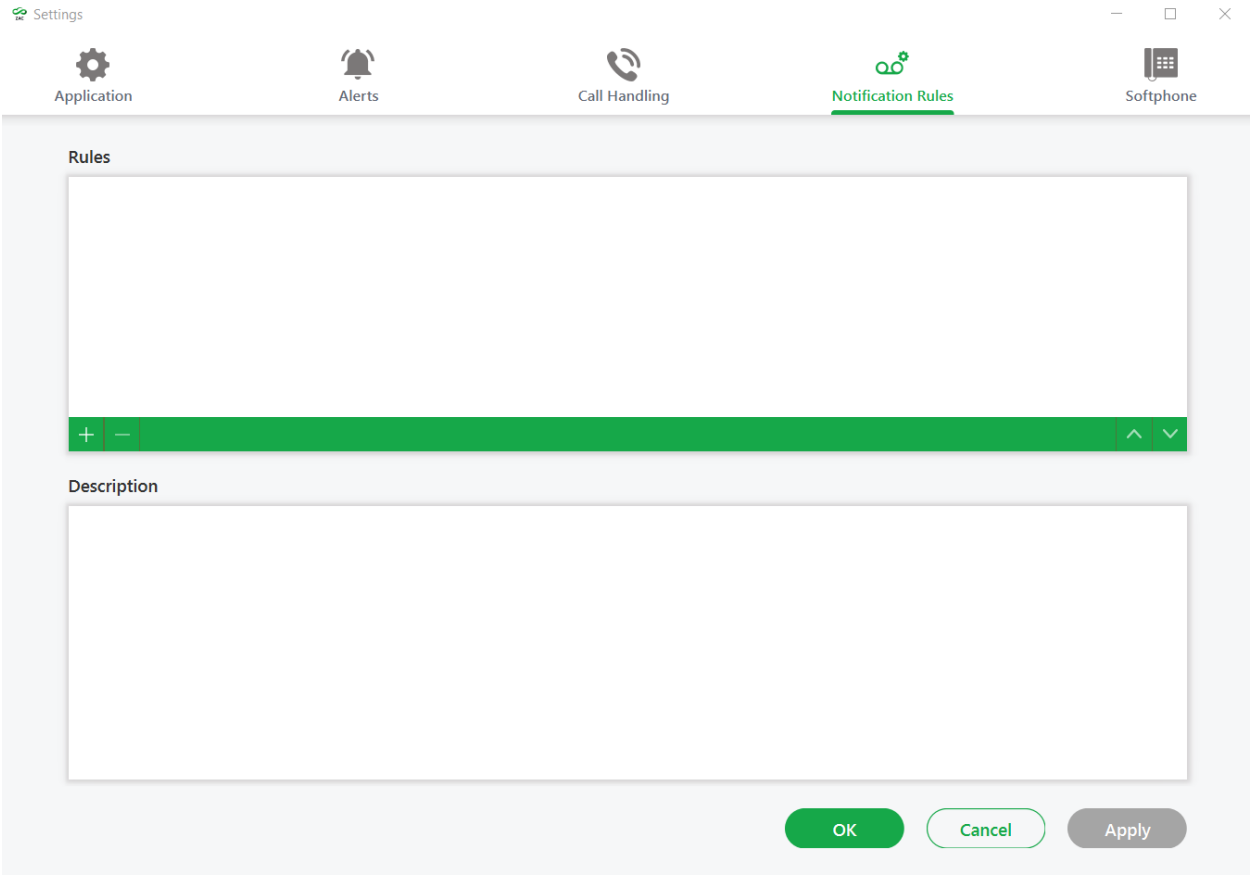
Rule – If you are adding a new rule, enter the rule name that you want associated with the rule.

Events – Allows you to select which events can trigger the rule. On the Phone, No answer, or any incoming call. Note that you may combine On the phone and No answer events in one rule.

Conditions – Allows you to select specific conditions that can be associated with the event. Options include, My presence, Call from, Date range, Time of day, Days of week, Holidays, or Location(MX system) are available.

Action – Allows you to select what action will be performed by the rule based on the selected events and conditions programmed. Forward to, forward to VM, find me, or reject the call area available actions.

2.3.4 Settings Menu – Notification Rules:



This area allows you to setup individual voice mail notification rules to control how voice mail notifications are handled under different conditions. Rules can be created, edited, or deleted in this area.

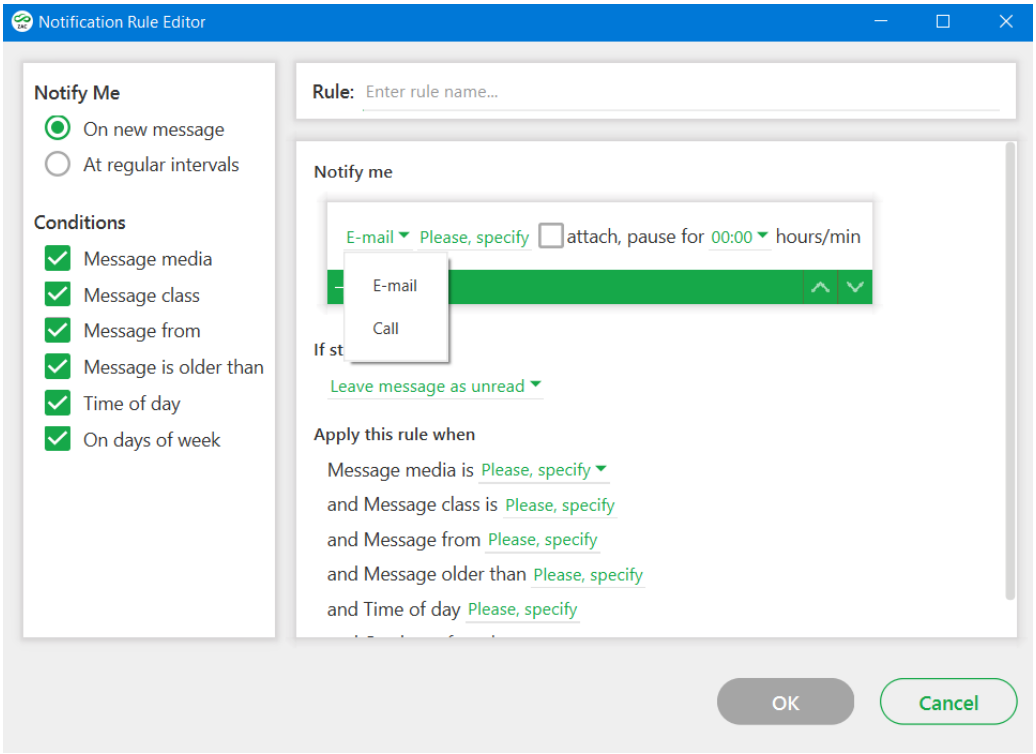
To add a new rule, click the icon at the bottom of the Rules area.

To delete an existing rule, highlight the rule and click the icon at the bottom of the Rules area.

You may also enable/disable an existing rule by clicking the checkbox next to the rule .

After creating a new rule or to edit a rule (double click the rule), the notification rule editor window will appear.

Adding/editing a voicemail notification rule:



Rule - If adding a new rule, enter the desired name to be associated with the rule.

Notify me – Allows you to select when notification occurs, with each new message or at a specified/regular interval.

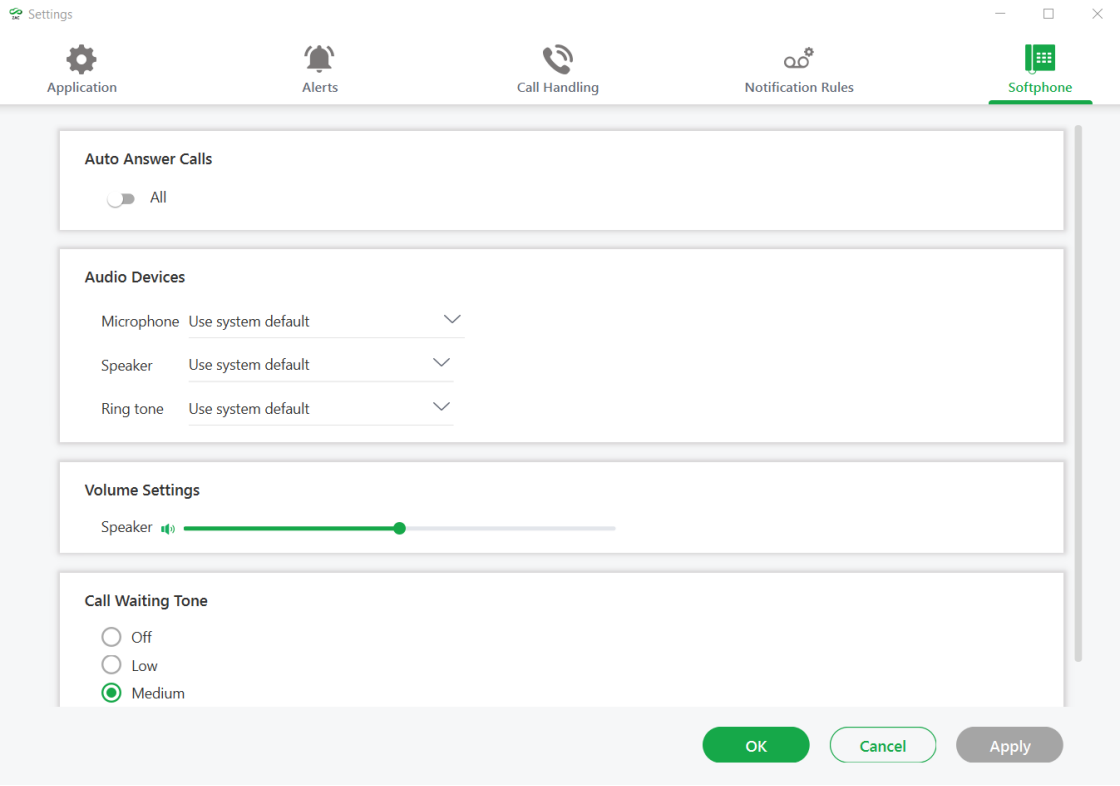
Conditions – Allows you to select specific conditions with the notification that will trigger the rule. Media type, class, from, older than, time of day, and days of week are available.

The attach option will send an email that contains the audio of the voicemail message.

2.3.5 Settings Menu - Softphone:

This area allows you to setup the parameters associated with the internal softphone provided by the program. The softphone allows you to utilize your PC audio to handle calls without requiring a desk phone.

Note: Softphone signaling is through a TLS Secured WebSocket connection. Media signaling is sent over DTLS, an encrypted UDP-based protocol and the media is sent via SRTP. There is no need to configure UDP/TLS as on previous versions.

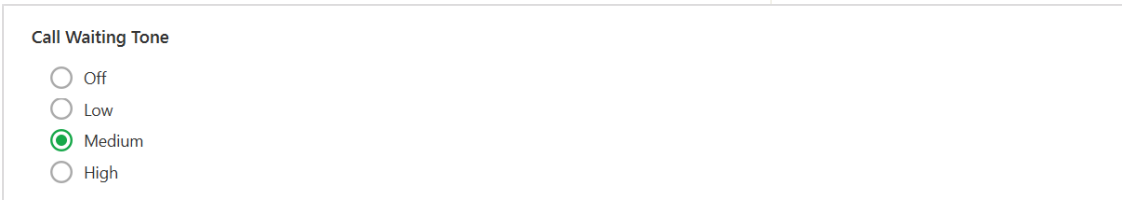


Auto answer calls – Allows you to select if calls are automatically answered when they ring your phone. Call types that can be selected are internal/external or both.

Audio devices – This area allows the selection of the audio devices the softphone uses for receive audio, ringtone, and transmit audio.

Volume Settings – This allows you to set the speaker volume of the audio device the softphone utilizes.

Call Waiting Tone –This setting adjusts the audio level of the call waiting tone when using ZAC softphone. Default setting is Medium.



2.3.6 Plantronics Headset Support

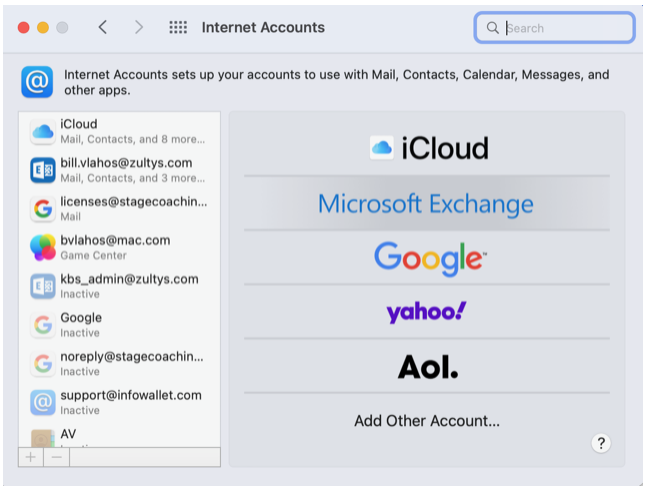
ZAC 3.2+ includes built in support for the most recent Plantronics SDK - HUB. There is no Plantronics driver software required. This allows ZAC to integrate with the most recent Plantronics headsets including the Bluetooth versions. All versions of Windows that support Plantronics HUB software are compatible with ZAC. On Macintosh OS, versions 10.13+ are supported with ZAC.

This support extends to call control of the Plantronics headset as well. Answering and disconnecting calls can be performed by using the headset answer/disconnect button. Plantronics Savi 710/740 and Voyager Legend Pro have been tested with ZAC. These headsets provide call control via the headset buttons.

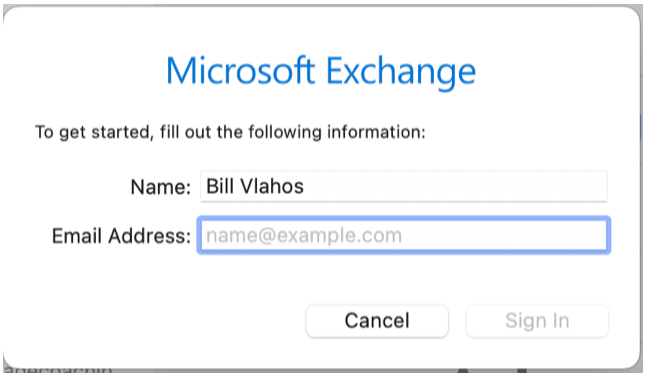
2.3.7 Macintosh Calendar Integration

To add scheduled conferences to the Mac calendar perform the following configuration steps:

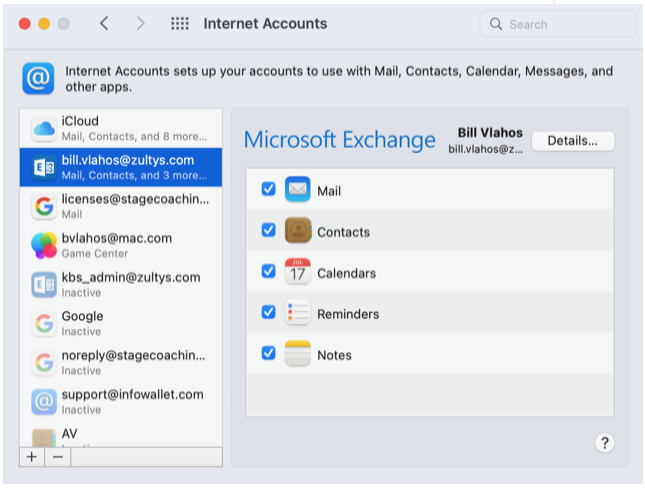
- Open **System Preferences**
- Click on **Internet Accounts**
- Click on **Microsoft Exchange**

1. 

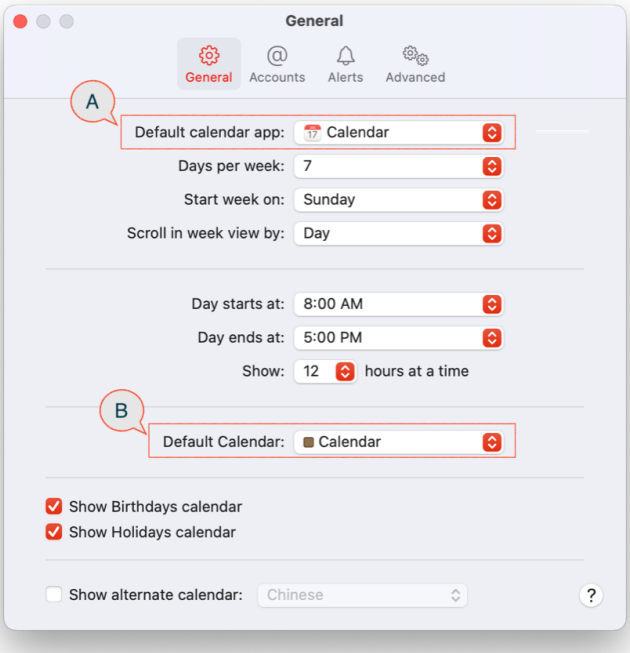
- Enter her name and Zultys email address

1. 

- Check the boxes for **Mail** and **Calendars**. The others are optional.

2. 

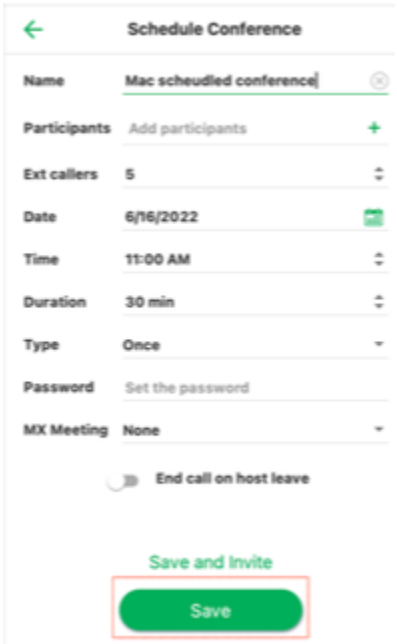
- Open the **Macintosh Calendar application**
- Open **Preferences…**
- Leave the **Default calendar app** (A): as **Calendar** (this is the built-in calendar app on the Mac.)
- Set the **Default Calendar (B)**: to the Zultys **Calendar** from the popup menu.



- Once this is done, the **Mail** and **Calendar** apps will have the **Outlook/Exchange** account info. The user can choose to use them or just ignore them and use **Outlook**.

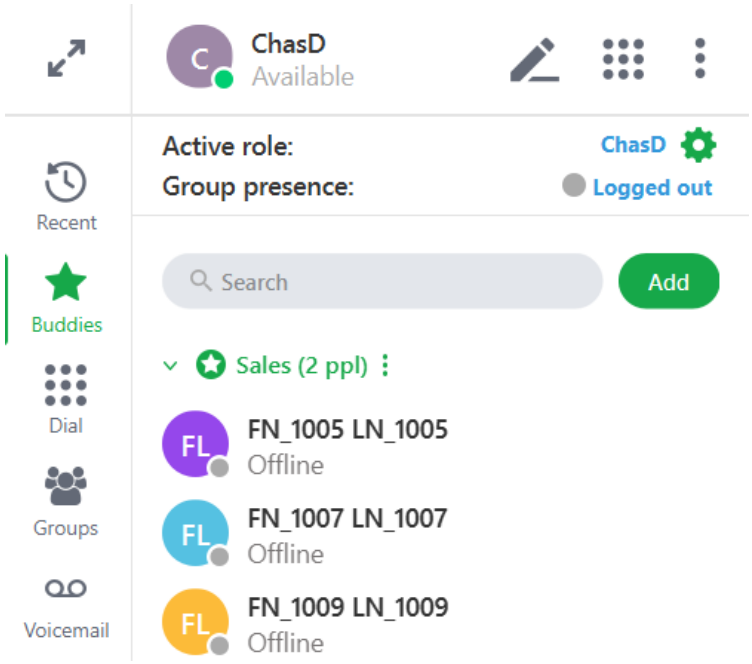
When the user schedules a conference in ZAC, click the **Save** button - not the **Save and Invite** link. The **Save and Invite** does something different which isn't as useful on the Mac like it is on Windows. It will add a vCAL file.

The scheduled conference will show up on the Outlook calendar automatically in a few seconds. The user will then open the calendar event itself and invite attendees as normal.

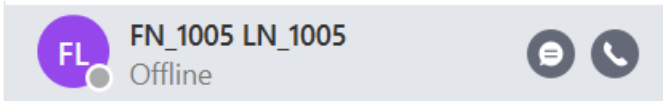


2.4 Buddies Screen

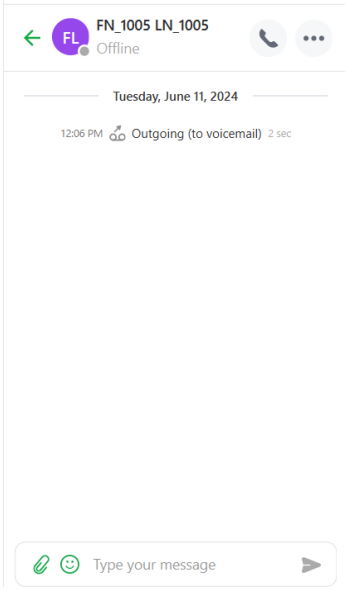
This is the screen where the contacts you designate as buddies and buddy groups are located. This provide easy access to users/groups of users you may frequently communicate with.



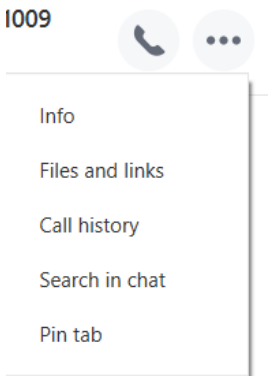
As you mouse over a buddy, the chat and call icons will appear. This allows you to start a chat session or call the user by clicking on the icon:



Clicking on a buddy will display the call and message history for the user.

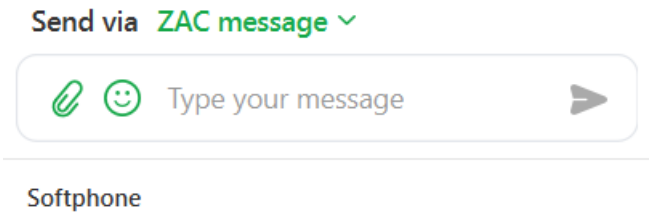


Clicking the Options icon will present a sub menu as:

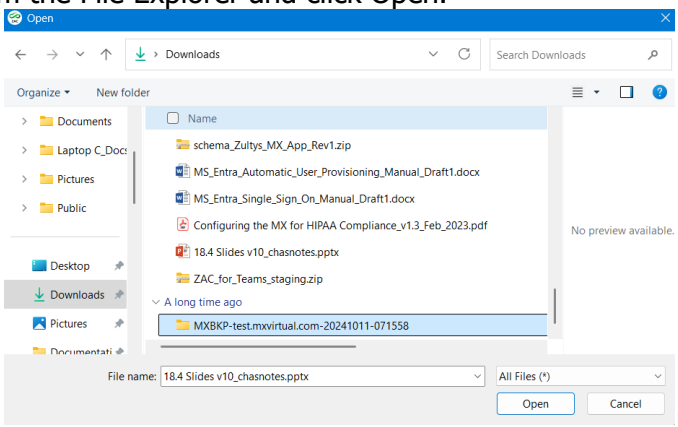


2.4.1 Chat (files and emojis)

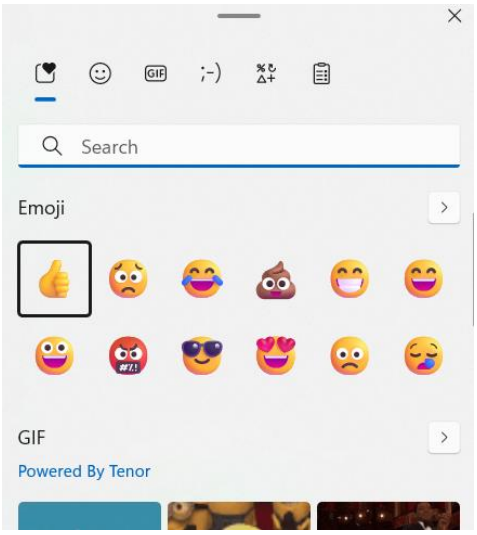
The chat window allows you to exchange messages with other MX users. These users can be Buddies, Contacts.



- Click the paperclip icon to insert a file to transfer to another user.
- Select the file from the File Explorer and click Open.

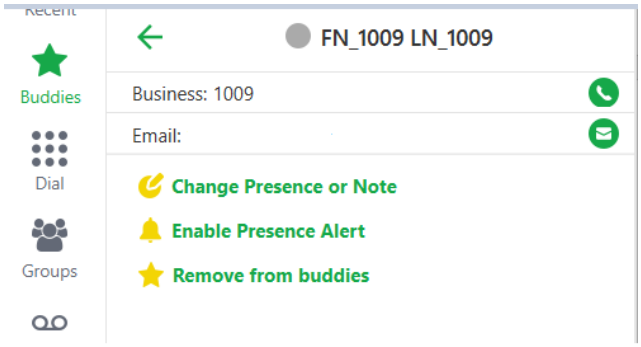


- +
- Click the emoji icon to insert an emoji.
- You may select recent, emoji, GIF, ASCII, symbols, or the clipboard as the source. These areas are at the top of the screen.



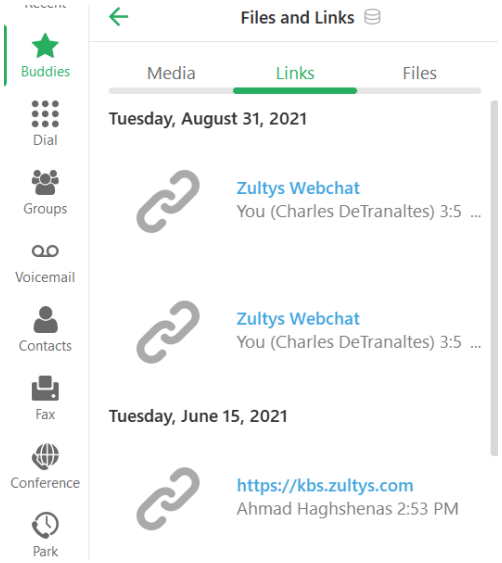
- Click the items to insert into the chat window.

- **Info**



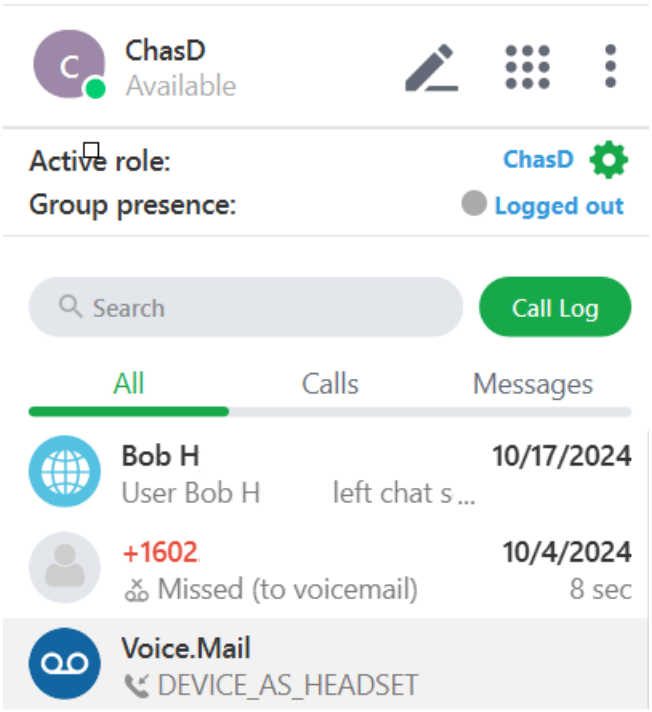
This will display the presence state, extension number, e-mail, enable presence alert action and remove from buddy list action.

- **Files and Links**



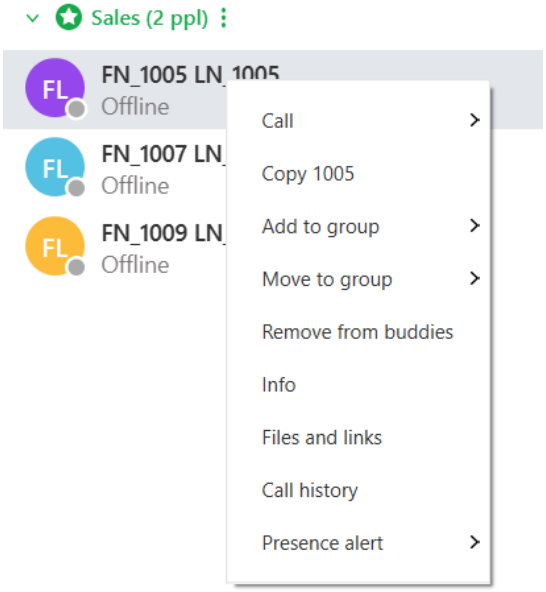
This area will display media, links and files that were shared with the user. You may sort by media type by clicking media, links or files. This will display all the media types exchanged with the user for the history period.

- **Recent**



This area will display a history of all recent calls, messages, or both with the user.

Right click on a buddy in the list to display the following options



Call – Will place a call the user

Copy Ext – This will copy the extension number to the clipboard.

Add to group – This action will allow you to add the user to an existing buddy group.

Move to group – This action will allow you to move the user to an existing buddy group.

Remove from buddies – This action will remove the user from you buddy list or buddy group.

Info – This will display the information screen about the user.

Files and links – This will display the file and link activity associated with the user. Media, Files and Links are supported.

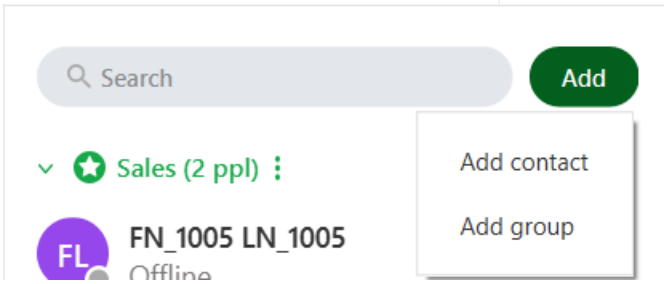
Call History – Will display your call history with the Buddy.

Presence Alert – Allows you set a presence alert for the Buddy.

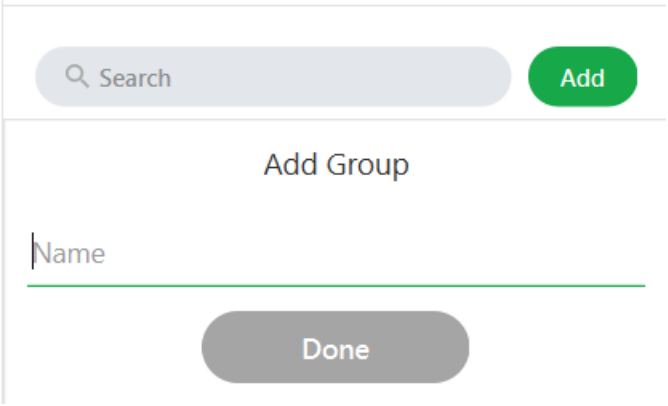
2.4.2 Buddy Groups

ZAC allows you to configure your buddies into groups for easy identification. For example, you may group your buddies by department Sales, Engineering, Operations etc.

- **Create a new group:**
  Click the Add button in the Buddies screen.

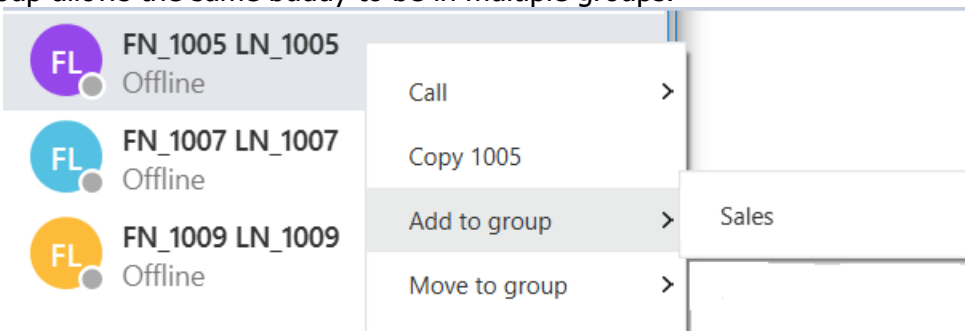


Click the Add group option.



Enter the desired name and click Done. You will see the newly created group appear in your list.

- **To add buddies/contacts to a group:**
  You may add existing buddies to a group simply by dragging the buddy into the group.
  You may right click on a buddy and use the Add or Move a buddy to a group. Adding to group allows the same buddy to be in multiple groups.



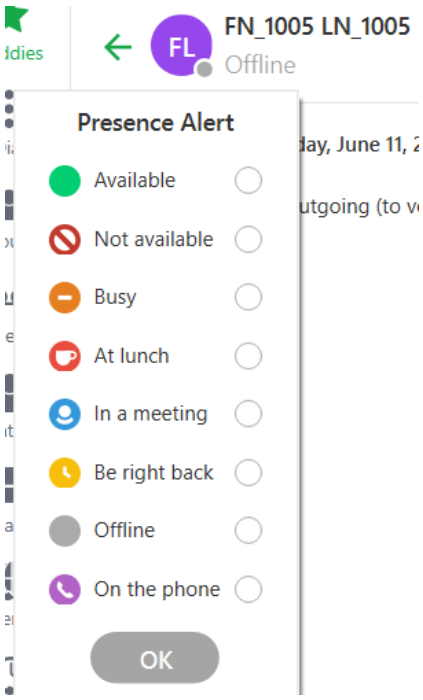
2.4.3 Presence Change Alert:

This allows you to set an alert based on a users' presence change. For example, you may want to know when a user goes from Not available to Available. Two methods are available for the user:

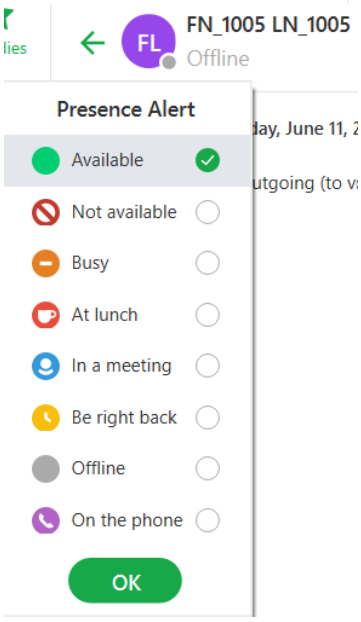
- **Option 1:**

  Click on the desired buddy/contact.

  Click on their presence status. A dropdown will appear.

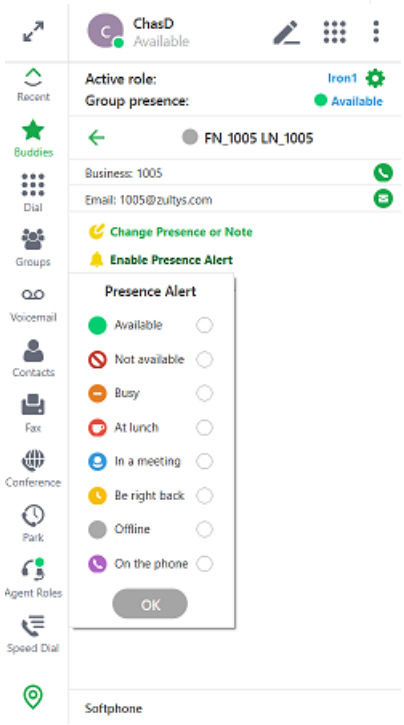


  Select the desired presence state and click OK

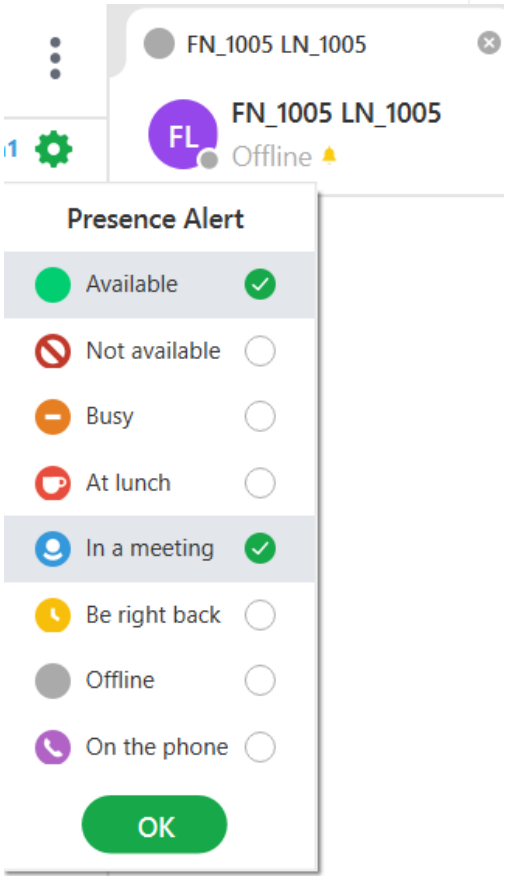


- **Option 2:**

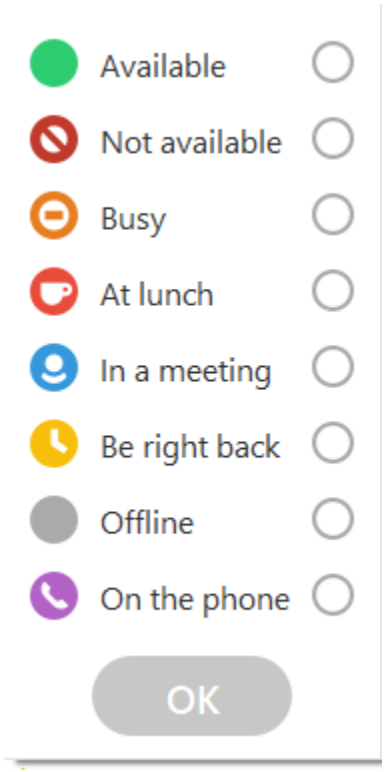
  Right click on the desired buddy/contact and click Info. Click the Enable Presence Alert, select the presence state and click OK.



If you are in expanded mode with the contact selected, you may select the info icon:

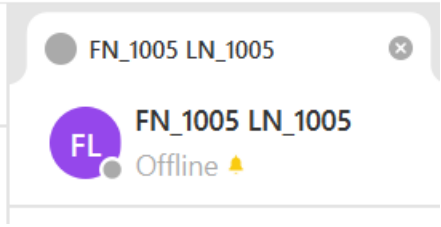


Click Enable Presence Alert or select Change presence alert

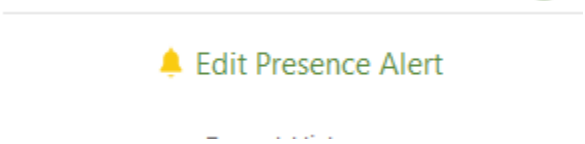


Select the presence and click OK

Once the alert is set using any option, an alert icon will appear on the current presence state of the user (compact/expanded mode shown):



You can edit/delete the alerts by clicking Edit Presence Alert



You may select another presence state or uncheck the current one and click OK to cancel the alert request.

Note: You may also navigate to Settings>Alerts to manage all your active presence change alerts.

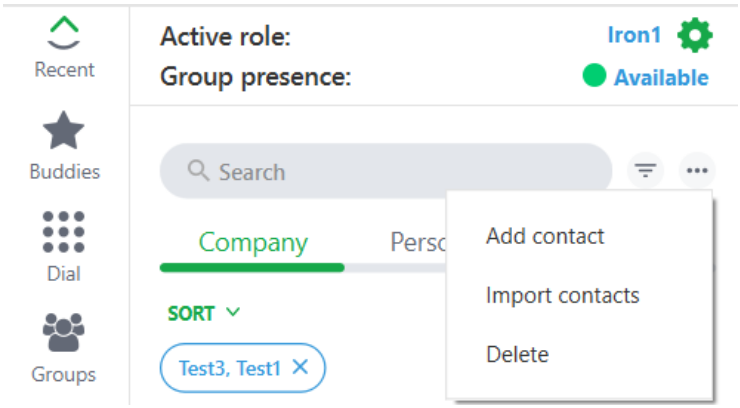
When the selected users' presence changes, an popup notification will appear and a sound will play.

2.4.4 My Contacts

In addition to Buddies, you may view all MX users, create your own local contacts and import contacts from Outlook, Vcard or .csv file types can be imported.

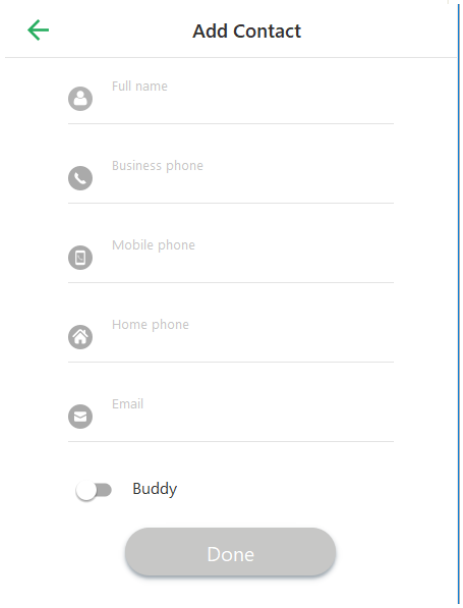
2.4.4.1 Adding contacts

Click the options button in Contacts>Local screen:



Click Add contact.

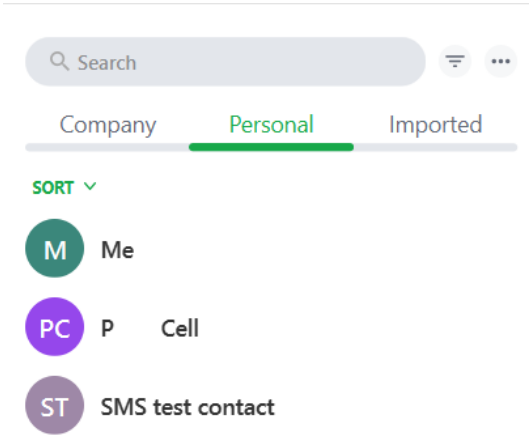
Enter the desired contact information:



Click Done

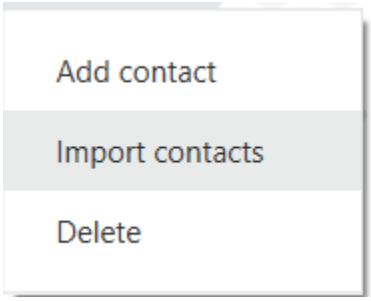
2.4.5 Personal

Store personal contacts of particular MX user on MX side to be able to use on any client and reference in Buddies. Currently this is local ZAC feature (local contacts) which is lost on move to different PC and to WebZAC/Mobile as well as with password change as local contacts are stored in encrypted (by user password) local DB.
Personal contacts can be added as a Buddy. The contact will display both in Buddies and Personal.
You may store up to 1000 personal contacts.

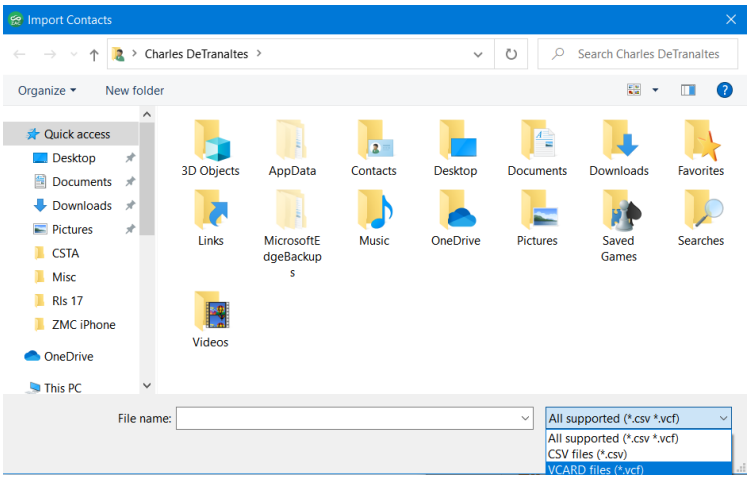


2.4.5.1 Importing contacts

Click the options button in Contacts>Imported screen:

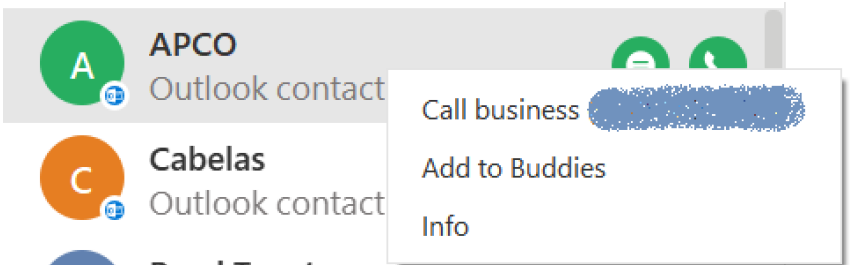


Use the File Explorer to navigate to the folder/file to import. Select the filename and click Open.



Contacts will display in the Imported area.

Right click to present option.



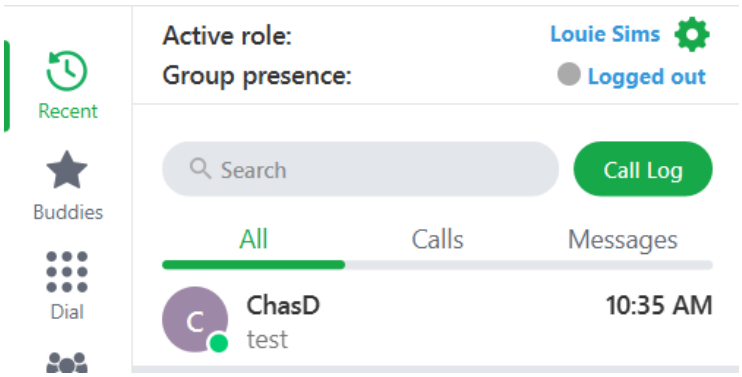
Call business – This will place a call to the callerID the MX received.

Add to Buddies – This will add the contact to your buddy list.

Info = This will present the information screen for the contact.

2.5 Recent Activities Screen

The recent activities screen displays a list of the most recent activity you have had. In addition, the Call Log can be accessed from the Recent screen.



You may filter Recent activity by All, only Calls, or only Messages. Simply select the All/Calls/Messages header items to select that particular filter.

Recent activities>ALL - displays all calls (inc/out/missed) and all messages the ZAC user handled grouped by contact. If there are multiple entries for the same contact, only the most recent entry is displayed.

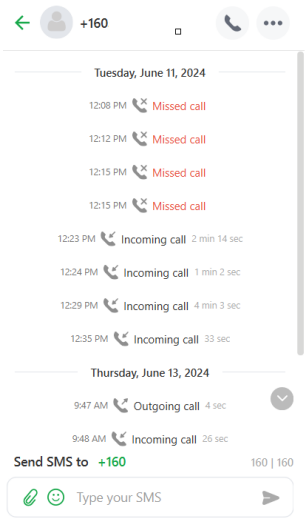
Recent activities>CALLS - displays all calls (inc/out/missed) the ZAC user handled

Recent activities>MESSAGES - displays only the messages the ZAC user handled

Moving your mouse over the contact will display the call and message options.

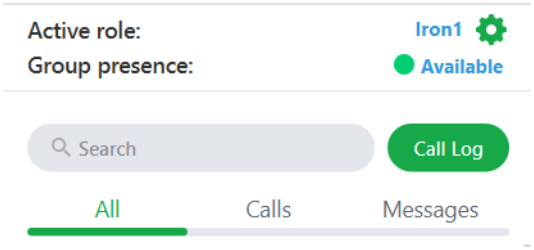
The history for that contact is also available by clicking the contact.

Additional options are presented by a mouse right click.

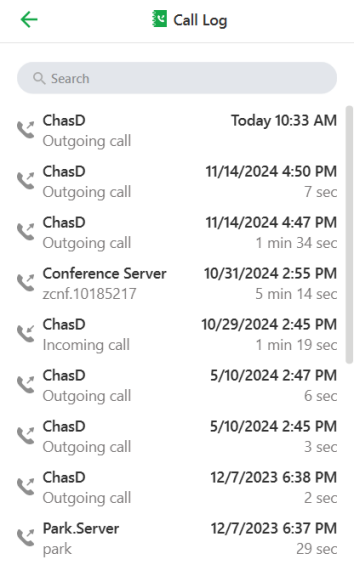


2.5.1 Call Log

You may access the Call Log from the Recent activity area by clicking on the Call Log icon.

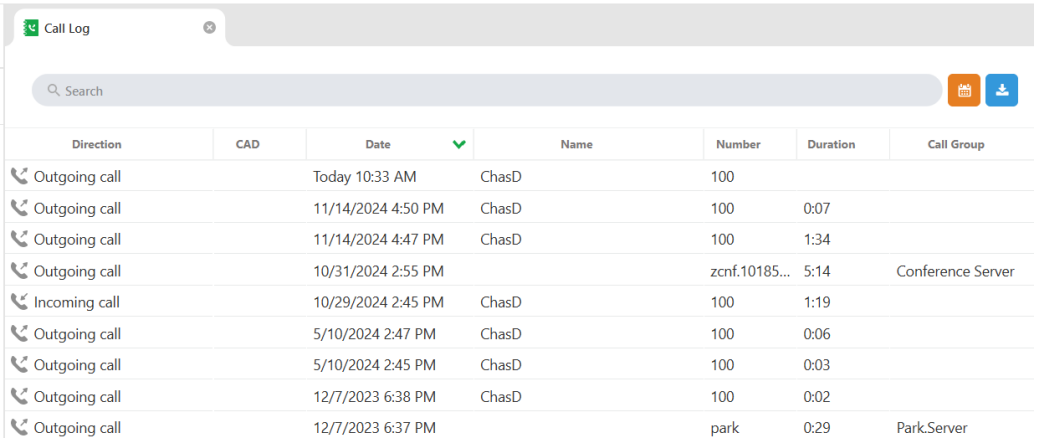


A list of calls will be displayed.



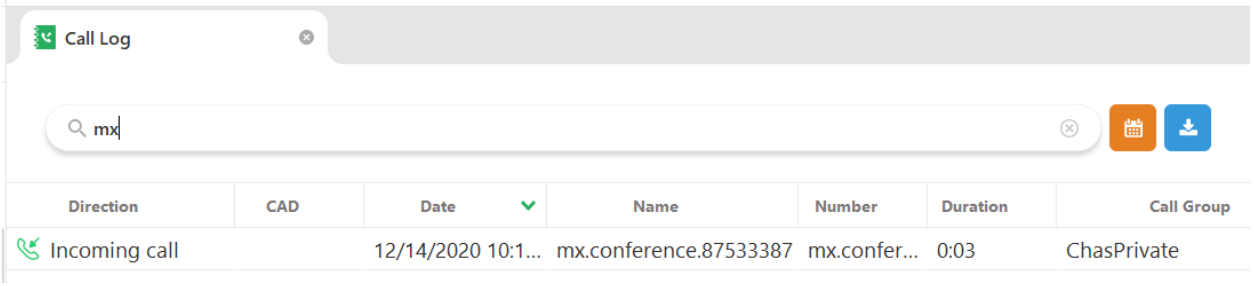
You may select a specific call log entry and click Call Back to call the party.

In expanded mode, the Call Log will display additional log information.



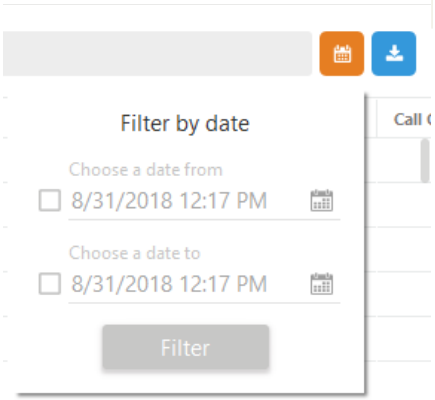
You may sort the entry order of columns by clicking on the column heading.

You can utilize the search function to locate a number, name, etc. The example below shows a search for "mx" returns all MXconference items to the top.



You may also filter the Call Log by date and time:

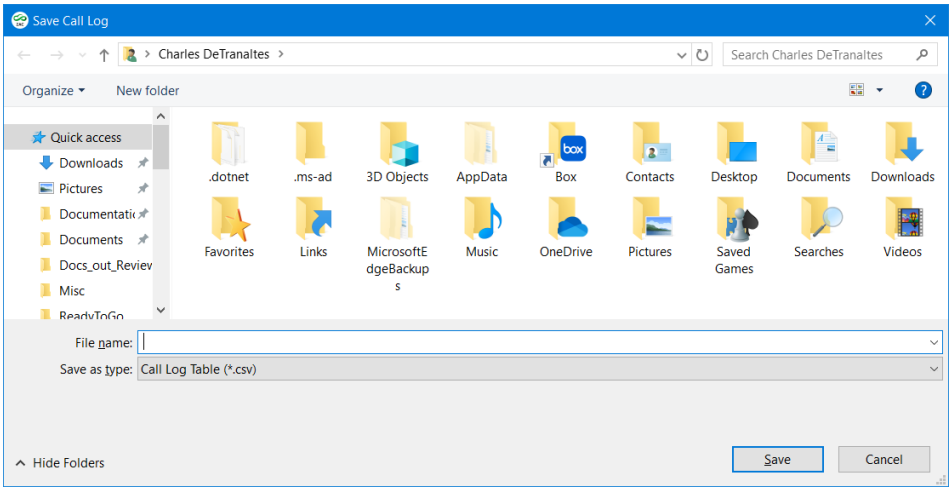
- Click the filter by date icon



- Check the box and enter the desired From date/time
- Check the box and enter the desired To date/time
- Click Filter

The Call Log entries may be exported in a .csv file format.

- Click the Save to .csv icon
- Navigate to the desired drive/folder
- Enter the desired filename



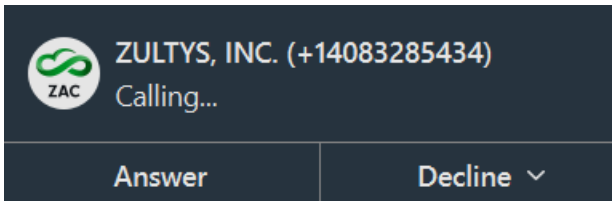
- Click Save

2.6 Dial Screen

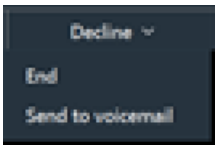
This is the screen in which you make and receive calls as well as manage active calls.

2.6.1.1 Incoming calls:

If you have popups enabled, a popup with call information and the ability to answer/decline will be presented on your screen.

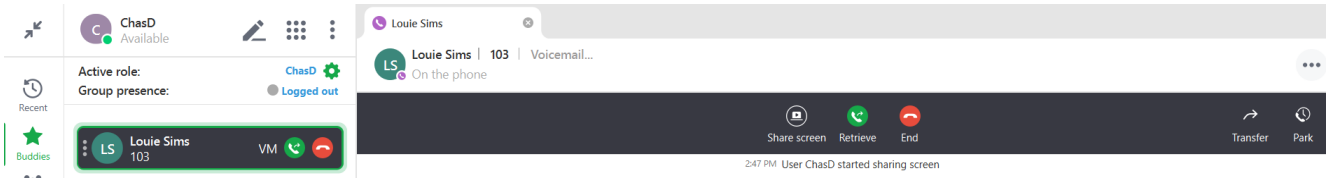


Clicking decline will allow you to end the call or send the call to voicemail.



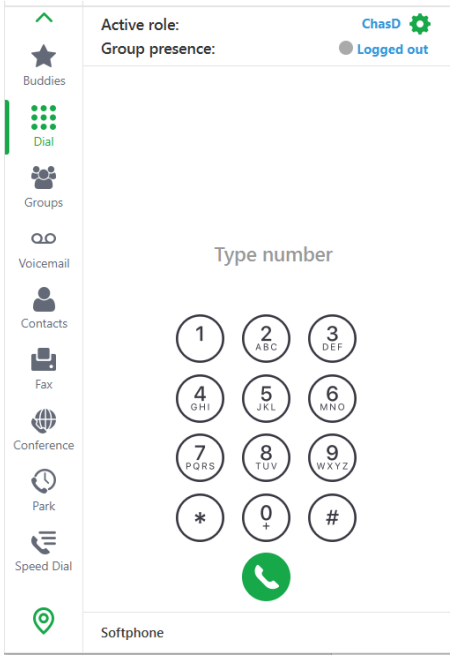
2.6.1.2 Retrieving a call that went to voicemail

You may retrieve a call that has forwarded to voicemail. In the call session window, click the answer button to retrieve the call from voicemail. In full mode you may click Retrieve.
A voicemail message will not be left if the call is retrieved from voicemail.

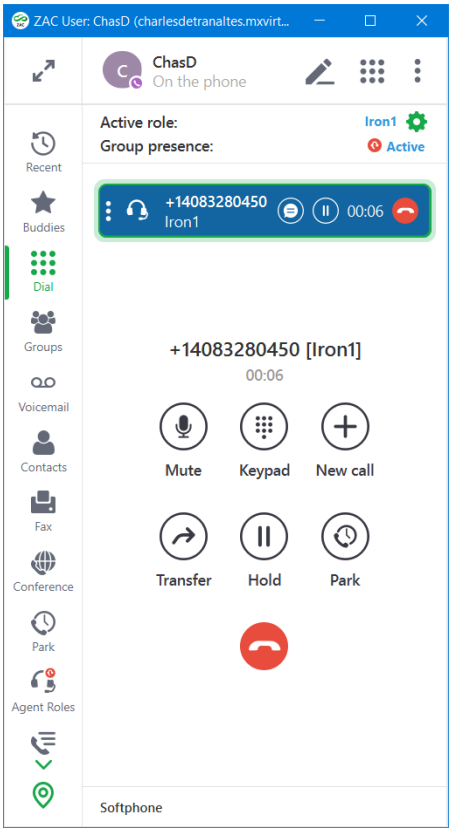


2.6.1.3 Outgoing calls

Dial screen, ready to enter phone number

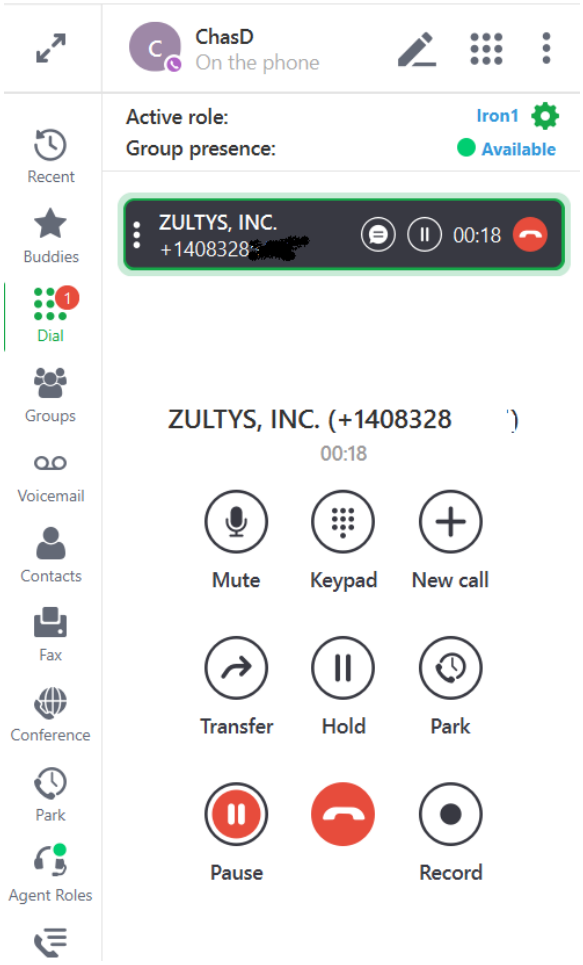


External outgoing call session

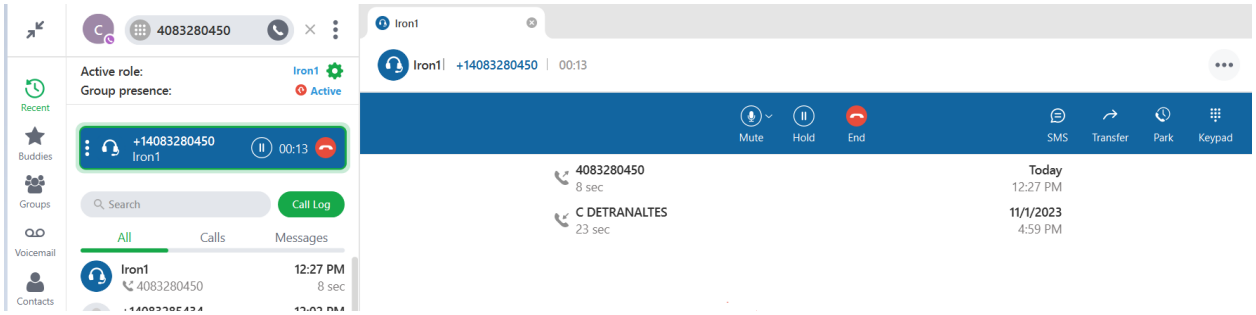


Note: The Mute and Keypad options are only available when you are bound to the internal Softphone. If you are bound to a desk phone, you utilize the mute/keypad of the desk phone.

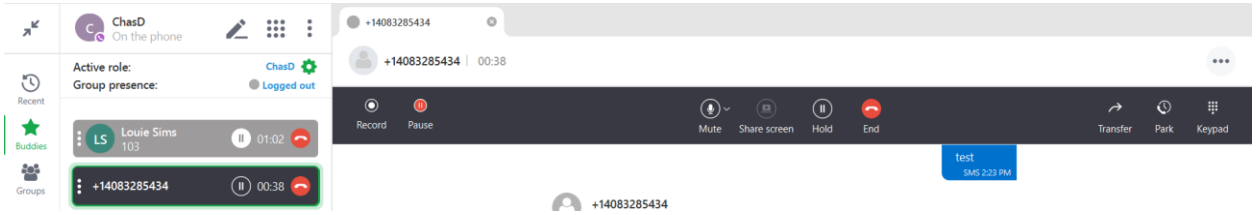
External incoming call session



Single call session in full mode:



Multiple call sessions in full mode:



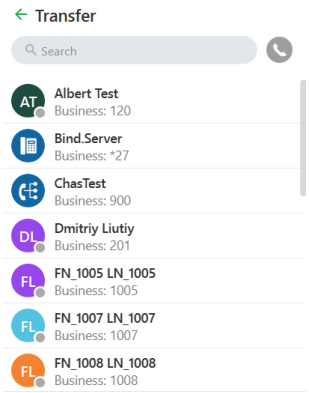
Switching between call sessions will display the corresponding tab associated with the selected call session.

Call transfer

While on a call, click the transfer button

Search for the user to transfer the call to.

Mouse over the user and click the transfer icon. You may also transfer the caller directly to the user's mailbox by clicking the voicemail icon.

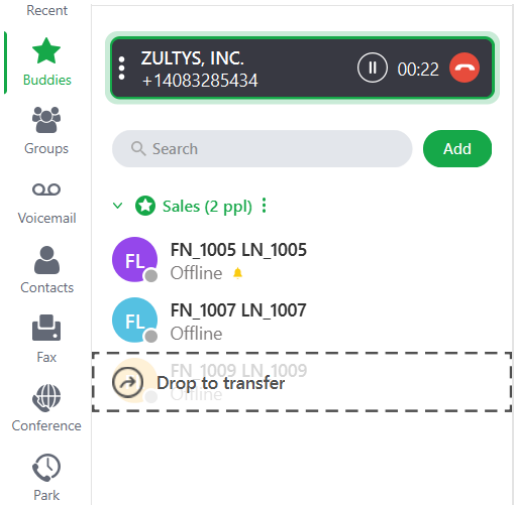


2.6.2 Drag and Drop Operations

ZAC allows many drag and drop operations to be performed to make call processing operations simple. Drag and drop operations will display context sensitive information during the operation. If a drag and drop operation is NOT allowed, the 🚫 icon will display.

2.6.2.1 Call transfer

- While on a call session, drag the call session to the buddy or contact user you wish to transfer the call to and release the mouse button.



- Attended transfer of calls by dropping one call onto another in the calls area or to call tab.
- Add a call to a conference by dropping it into the conference call in the calls area or conference tab.
- When a drag and drop operation is available, the icon will change to indicate the action to complete the drag and drop operation.

- If a drag and drop operation is NOT allowed, the 🚫 icon will display.

2.6.3 Attended Transfer

In an attended transfer, you speak to the party to whom you are transferring the call prior to the transfer. This may also be referred to as attended, or supervised transfer.

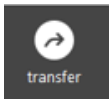
- Call the first party.
- Place the first party on hold by pressing the hold button on ZAC or simply call another user.
- Call the second party

To transfer the call:

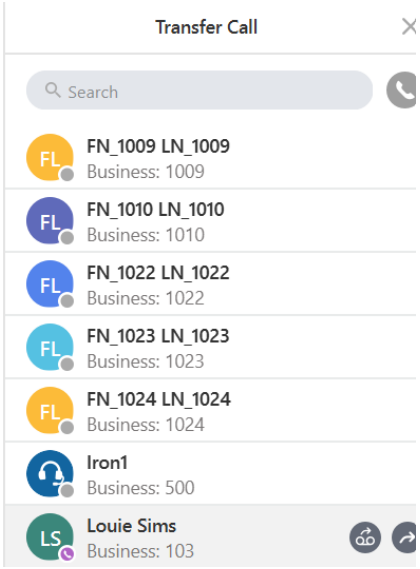
- drag and drop the session control block to the recipient's address book or buddy list contact.

2.6.4 Transfer to Voicemail

A user may transfer a call directly to another user's mailbox.

- While on a call, clicks the transfer icon 

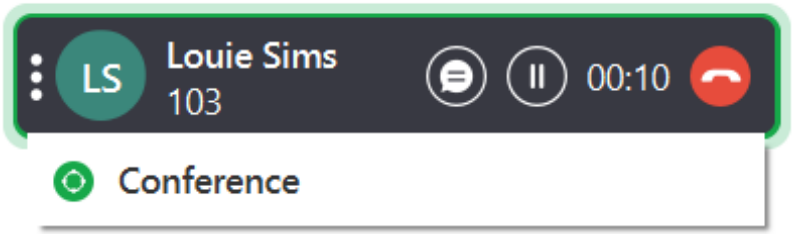
- Locate the desired individual in the Transfer Call area.
- Click the transfer to voicemail icon



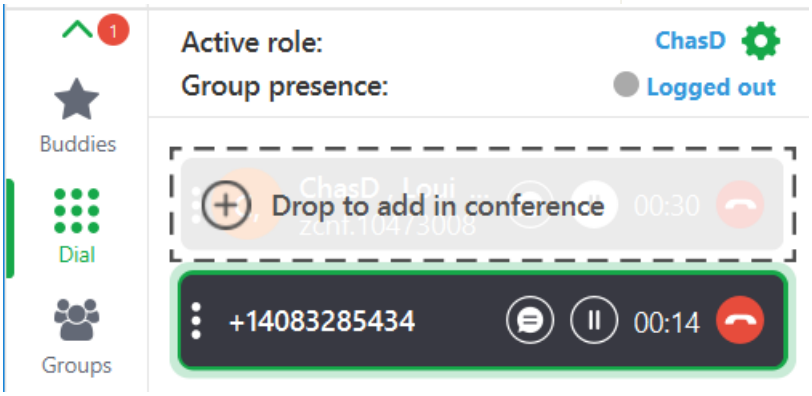
2.6.5 Ad Hoc Conference

You may add a party to an existing conference using drag and drop operation.

- When talking to a user, click the option icon on the left side of the call session window.



- Click the Conference
- Call the desired party to add to the conference:
- When the party answers, drag their call session window into the conference window.



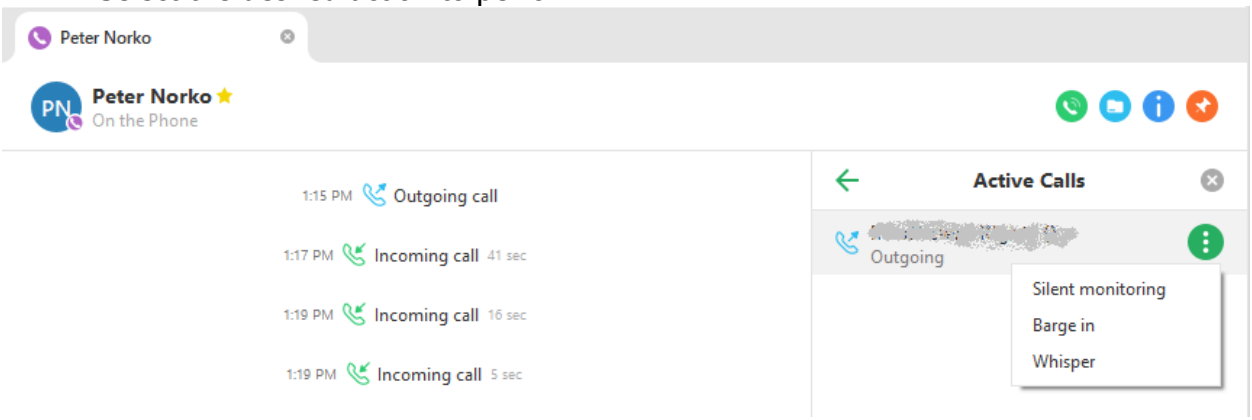
- Place the called party on hold and return to the conference.
- The called party is now added to the conference.

2.6.6 Whisper/Monitor/Barge

This feature allows users with proper administrative privileges to perform monitor/barge-in/whisper operations on user calls.

To monitor/barge-in/whisper to another user:

Right click on the desired user that is on an active call.
Select the desired action to perform.



Silent - This allows you to monitor the conversation of the user without them knowing they are being monitored.

Barge-In – This allows you to enter the call and listen/converse with both parties of the call. Effectively a conference is created.

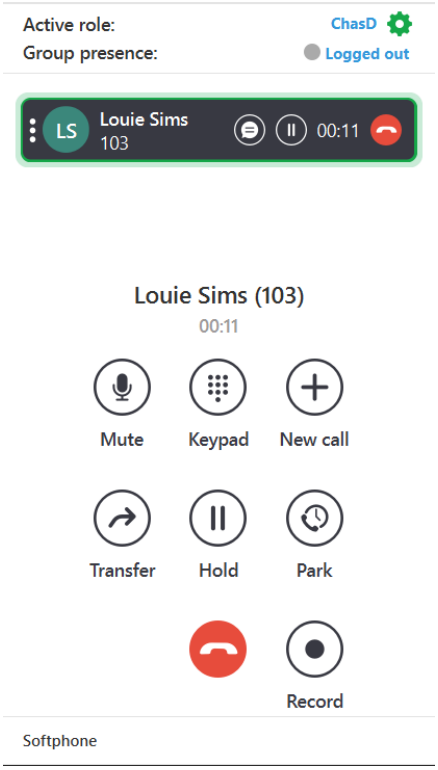
Whisper – This allows you to speak with the user without the outside/third party hearing what you say.

- Users must be configured to access the feature in MX Administrator
  [Can Monitor] If this setting is checked, this allows a user to monitor other users that have the "can be monitored" setting enabled in their profile.
  [Can be Monitored] If this setting is checked, users that have the "can monitor" setting enabled can perform the monitor function(s) on this user.
- Users cannot utilize this feature across an MXnetwork. Users can only monitor other users within their own system.
- Call group agents may only be monitored by Supervisors of the call group. Standard users are not able to monitor any call group agent with this feature.

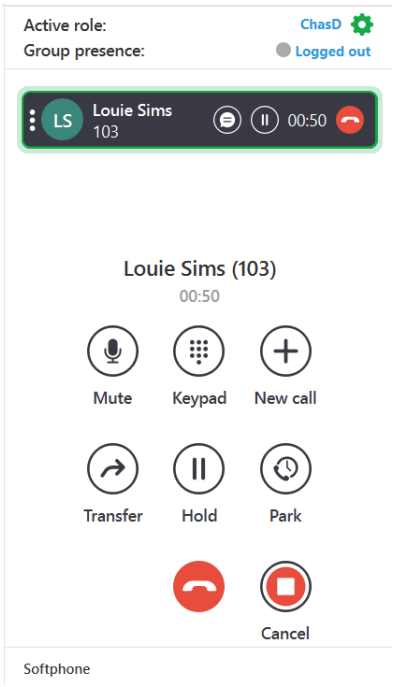
2.6.7 On demand call recording

This feature allows users to record calls and have them saved in their voicemail box. Calls are recorded from beginning to end even if the user started the recording after the call started. Users must be properly configured for access to on demand call recording to utilize this feature.

- While on a call click the Record button



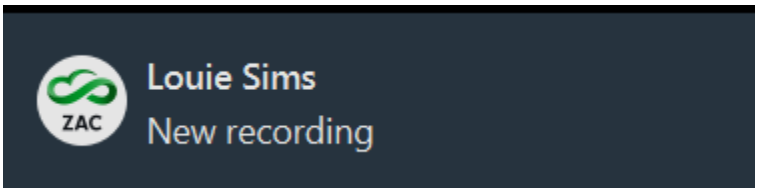
- The screen will change to:



- Continue the conversation. When finished, hang up the call.
- If you want to cancel the recording, click the Canel icon. The recording is cancelled and will not be saved.

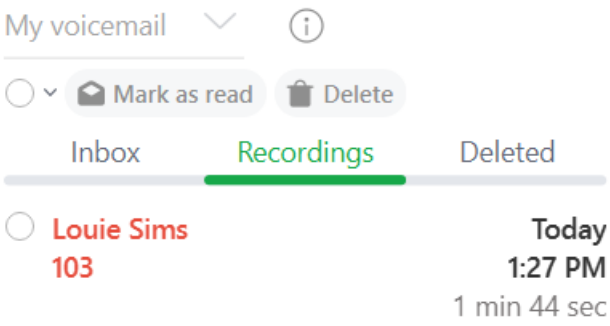
Once you have ended the call, several notifications will appear indicating you have a new call recording.

- Popup notification



- New voicemail indication

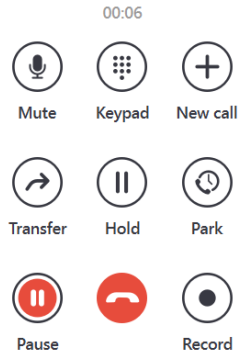
- Click on the recording to view available options.



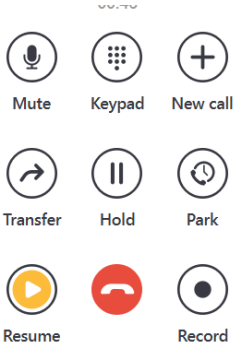
2.6.8 Pause/Resume Automatic call recording

This feature (if configured) allows a user to pause and resume an automatic call recording. This can be used to omit sensitive information that a user does not want included in a voice recording.

- To pause an automatic call recording, while on a call click the icon in the call session window.

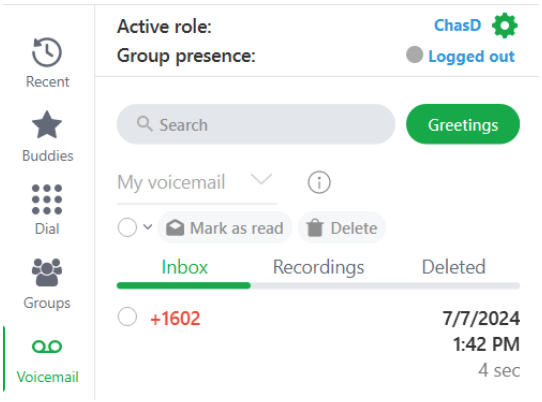


- To resume an automatic call recording, click the icon in the call session window



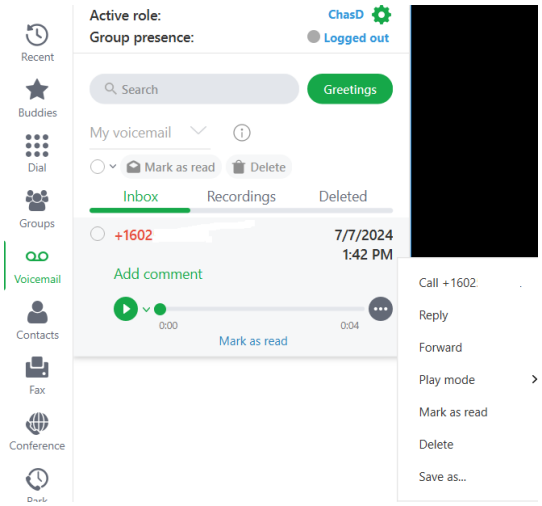
2.7 Voicemail Screen

This screen is where your voice mail, on demand call recordings, and mailbox greetings are accessed/managed.



You may choose to view your inbox or deleted box. A list of the voice messages will be displayed in each. Selecting the Recordings item will display a list of on demand call recordings you have.

When you right click or select the options on a message or recording, the options for the message will be presented:



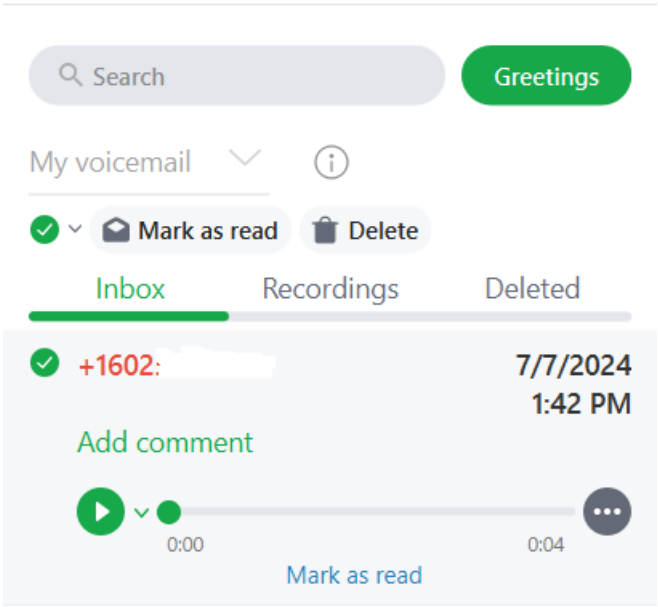
Add comment – Allows you to type a comment to be associated with the voice message. This comment will follow the voice message if you choose to forward the message.

Play/Replay/Pause – Allows you to listen or pause the message. You may also click on the sound bar to jump to any point of the message.

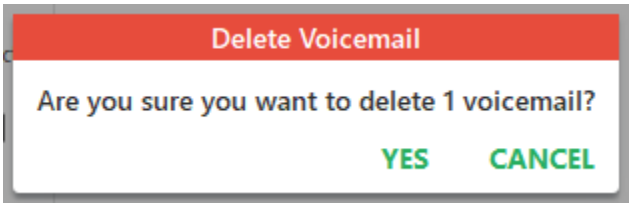
Delete – Deletes the message from the current box. If you are deleting from the delete box, you will be asked for a confirmation.

Delete multiple or all voicemails – You may delete multiple or all voicemail messages at one time. To do this, perform the following:

- At the voicemail screen, select the message(s) to delete using the checkbox. To select all, check the box at the top:

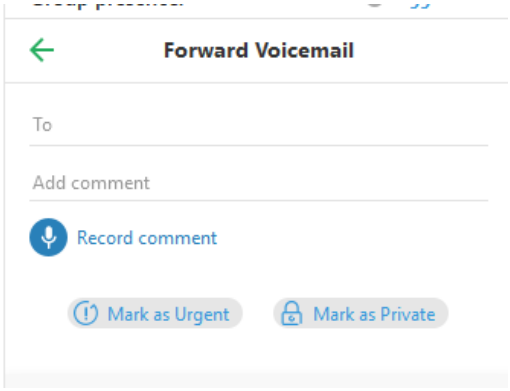


- Click the Delete Selected icon
-
- Click Yes at the confirmation window.



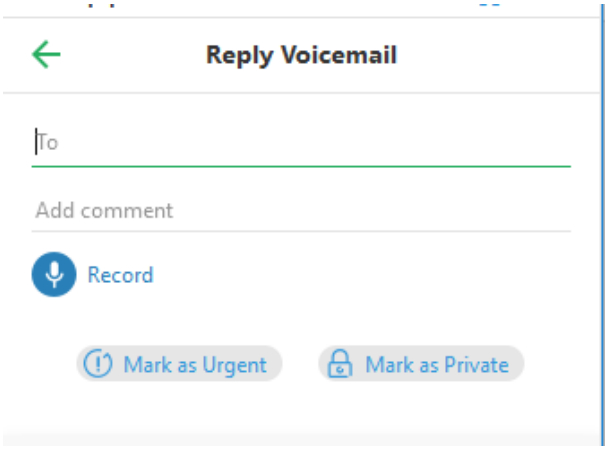
Call – This allows you to place a call back to the party that left the message.

Forward – This allows you to forward the message to another mailbox user. You may optionally record a pre-amble message to the forwarded message.
When you forward a message, you can start typing the intended forward party in the To field. ZAC will display matching names in the directory as you type.



Mark as unread – This allows to store the message in a unread/new state.

Reply – This allows you to reply to another mailbox user that left you the message.
When you reply to a message, you can start typing the intended reply party in the To field. ZAC will display matching names in the directory as you type.

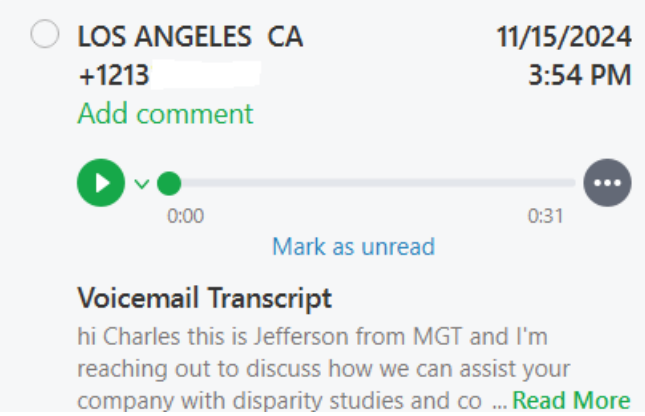


Play via Bound – This allows you to listen to the message on your desktop phone instead of your PC if you desire.

Save as – This allows you to download a copy of the voice message onto your local PC.

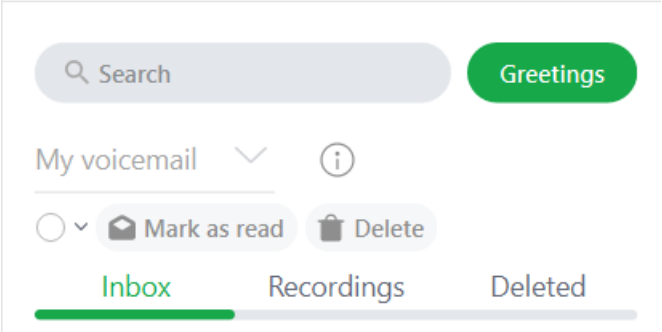
2.7.1 Voicemail Transcription

This feature will display the text of a voicemail that was left for a user. This service must properly be configured by your MX Administrator. Once configured, transcription is displayed as:

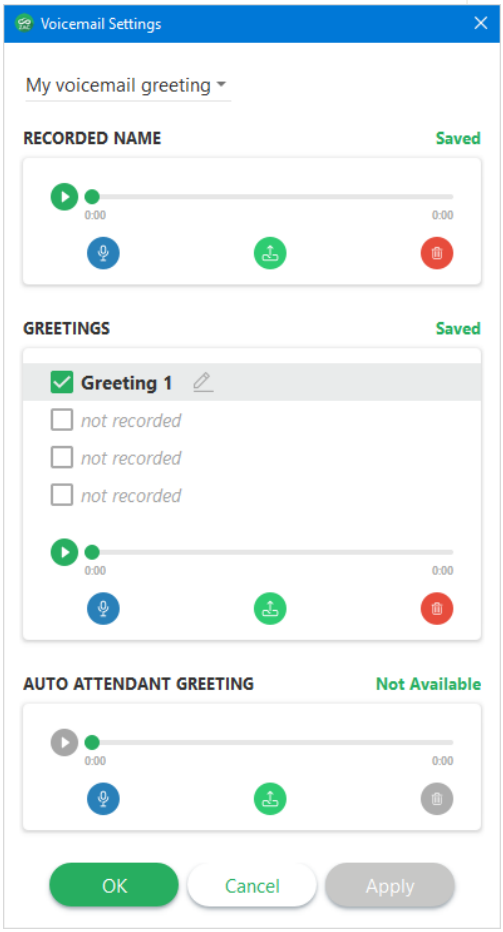


2.7.2 Voicemail Greetings

This menu is accessed by clicking the Greetings in the Voicemail screen. This screen is where you manage your greetings, name, and auto attendant greeting.



You may select your personal voicemail greeting or if you are part of a call group you may select the call group greeting.



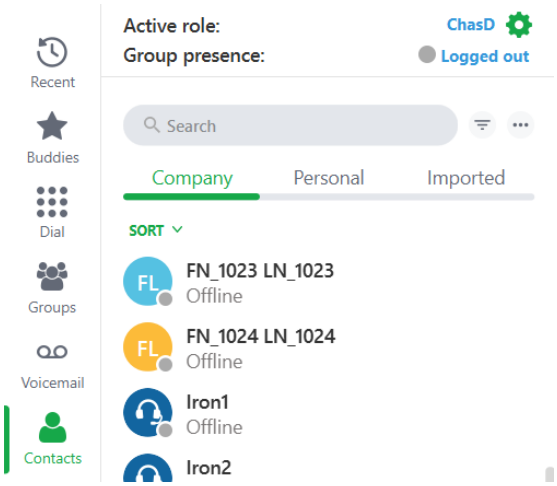
Recorded name – This allows you to import, record, or delete a user name that is associated with your mailbox.

Greetings – This allows you to import, record, or delete a greeting that is associated with your mailbox. You may have up to 4 unique greetings associated with your mailbox. To make a greeting active, click the checkbox next to the desired greeting.

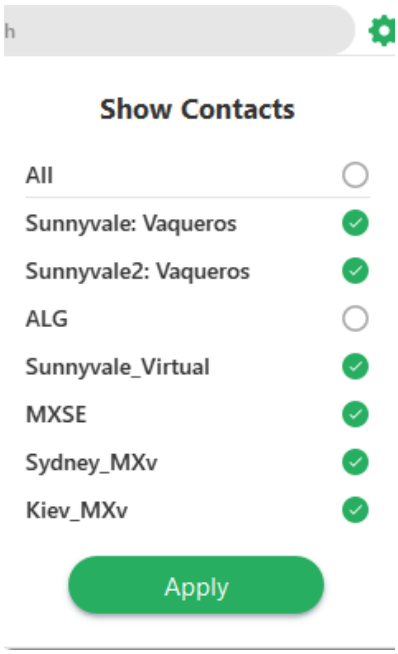
Auto Attendant Greeting – This allows you to import, record, or delete an auto attendant greeting that is associated with your mailbox.
The MX auto attendant routes calls to system users. Prior to routing a call to your phone, the auto attendant can play your greeting, recorded name, or extension to the caller. The auto attendant greeting is the greeting played by the auto attendant to a caller prior to routing the caller to your extension.

2.8 Contacts Screen

This is the screen where all the MX system contacts are located. This includes contacts in multiple locations if you are part of an MXnetwork.

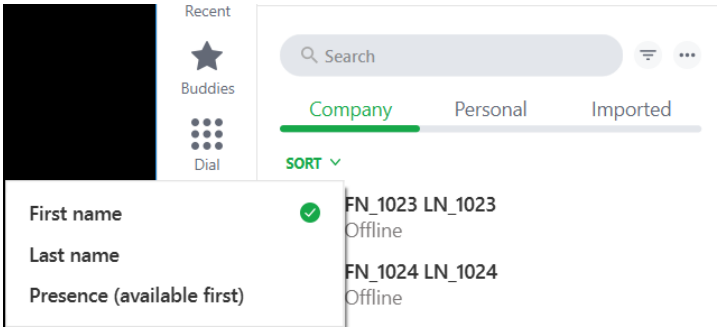


You can filter the contacts by locations when in an MXnetwork by clicking the Filter contacts icon . Select the desired locations you want to display. All the contacts from that location will be added to your contact list.



To add a contact as a buddy, highlight the desired contact and click the star icon on the desired contact: . The icon will change to:

You may sort Contacts by first name, last name, or presence by clicking the sort button:

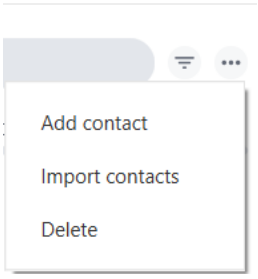


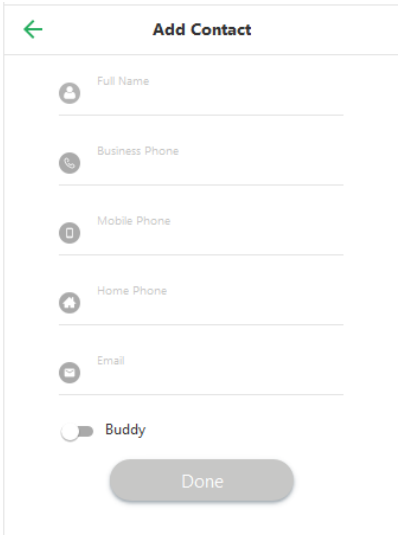
Contact Notes:

ZAC introduces the approach of showing local contacts - both old MXIE buddies and contacts created in ZAC are displayed in Contacts | Personal screen. Only contacts that are mentioned as buddies (same as for MX contacts) are displayed in the Buddies screen. There is still the ability to un-buddy a contact from the Contacts screen.

2.8.1 Adding Personal Contacts

- Click the More icon
- Click the Add contact options icon:
- Select Add contact



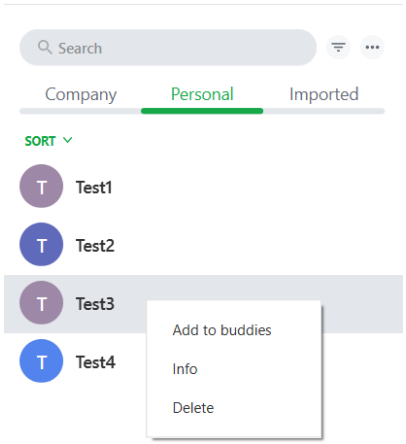


- Enter the desired information and click Done when finished.

2.8.2 Deleting Personal contacts

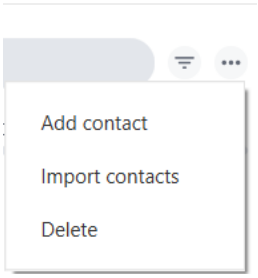
2.8.2.1 To delete a single contact:

- Right mouse click on the contact.

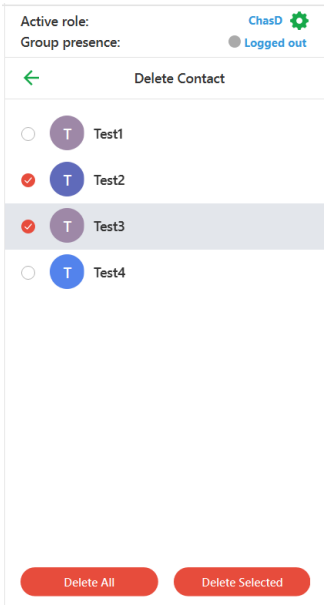


2.8.2.2 To delete multiple contacts

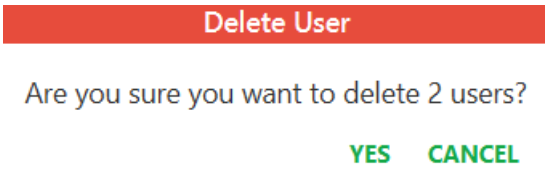
- Select Delete from the More menu



- Select the individual contacts to be deleted.
- Click Deleted Selected.

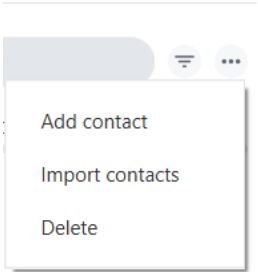


- Click the confirmation button to delete.

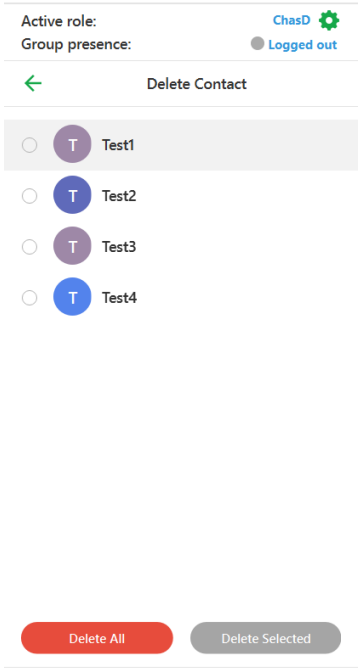


2.8.2.3 Delete All Contacts

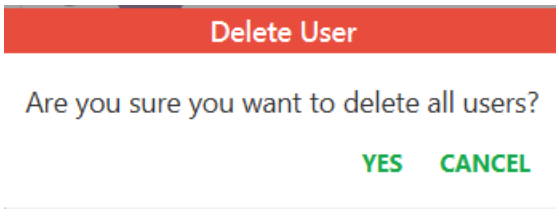
- Select Delete from the More menu



- Click Delete All.

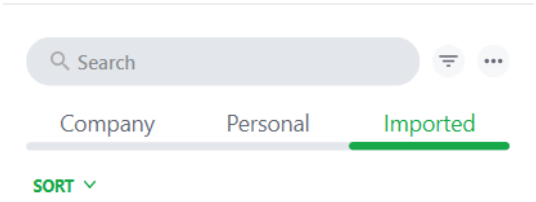


- Click Yes to delete.

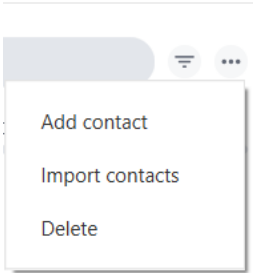


2.8.3 Importing Contacts

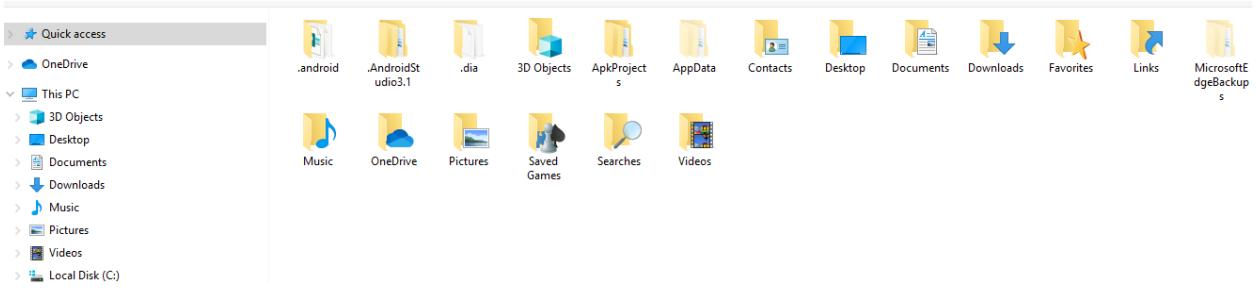
ZAC allows the importing of contacts into the Imported area of ZAC.



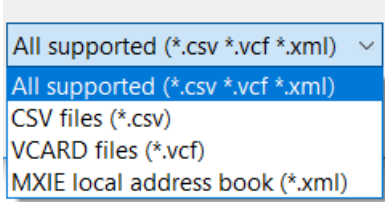
Select Import contacts from the More menu.



Navigate to the desired folder/file



You may import vCard, .CSV, or MXIE local address book file types.



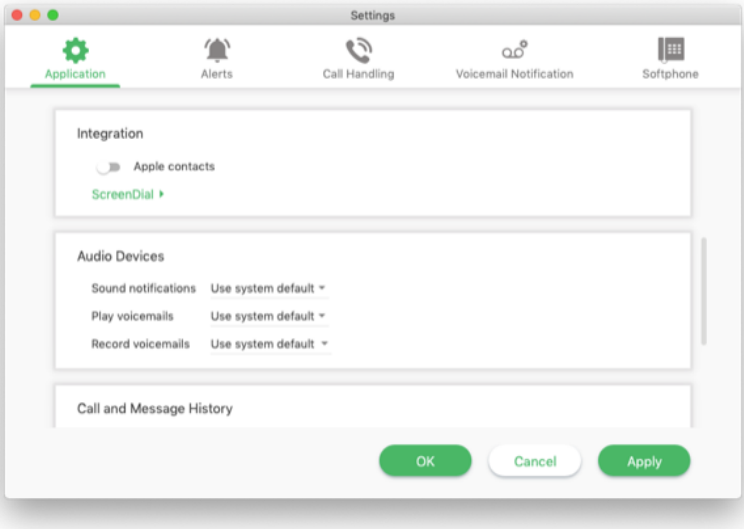
For the .csv import, the format should be as follows:

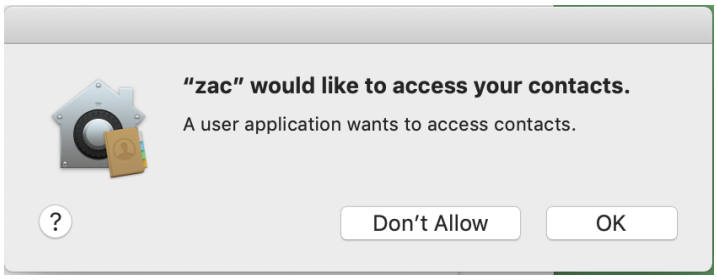
	A	B	C	D	E	F
1	First Name	Last Name	Business Phone	Mobile Phone	Home Phone	Email
2						
3						

NOTE: If a user sends a file via Chat that is a vCard type with a single contact, an "Add to contacts" item is available which will result in adding the vCard to Address Book.

2.8.4 Macintosh Contacts

You may enable support for native Macintosh contacts. In Settings>Application>Integration>Apple Contacts



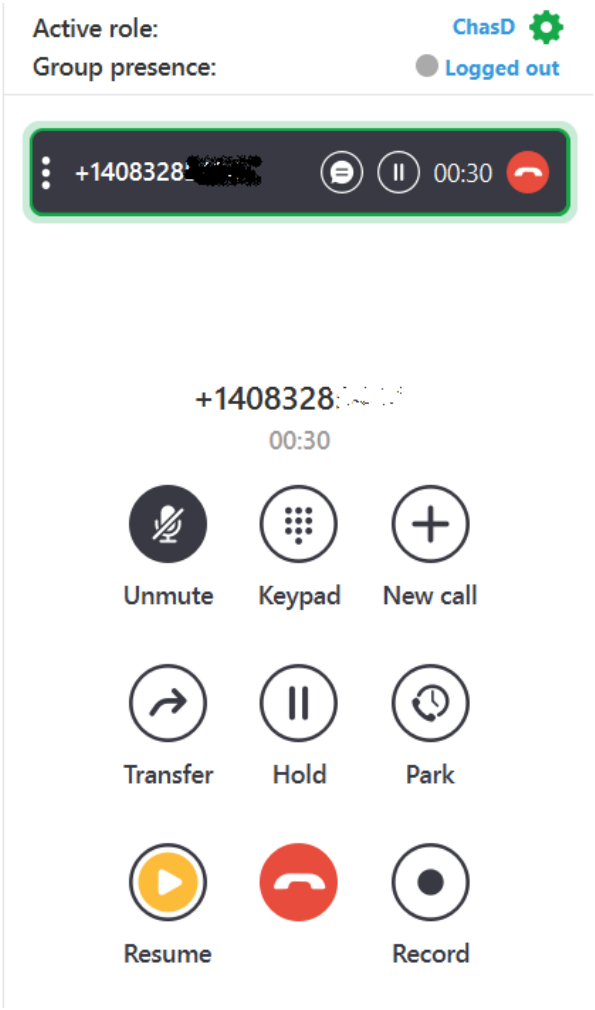


Click OK.

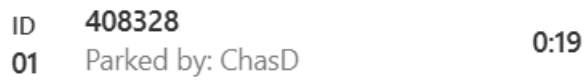
2.9 Parked Calls Screen

This is the screen where calls that are parked can be managed. This area allows the users to place/retrieve calls that are in call park locations.

To park a call, click the park icon while on a call:



When a call is parked the screen will display:



ID – The park slot ID

Caller – The caller that was parked

Parked by – The user who parked the call

Duration - Indicates the amount of time the call has been in park

To retreive a parked call:

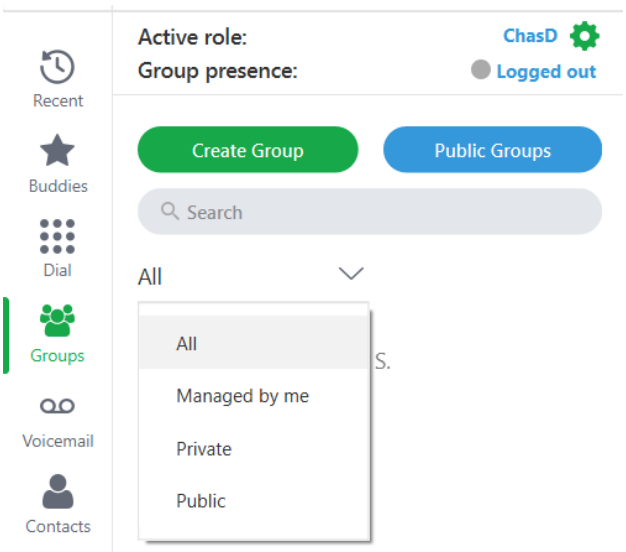
Click the handset icon on the parked call.

3 Groups

This is the screen where the Chat Group function is accessed and managed. Chat Groups allow users to have group chat, group audio and video calls, file sharing and desktop screen sharing while in a group chat or group chat conference.

Group members will receive notifications and can respond to any chats that come to the group. Any member of the group can send a message and all other members in the group will receive the message.
Starting in ZAC 5.0+, group chat members can send files to other members as well as create an audio conference with members.

You may filter Chat Groups by All, Managed by you, Private, Public.



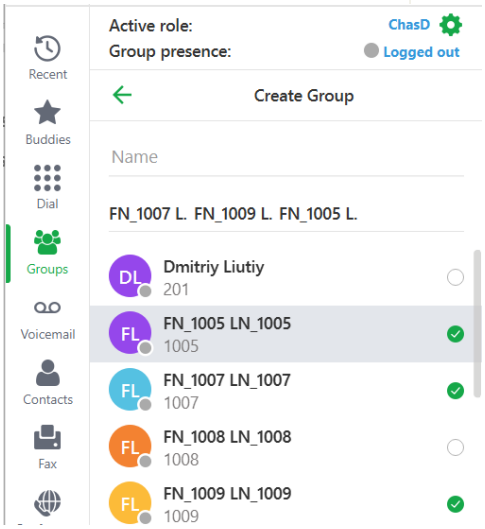
Public groups allow any user to join the group without requiring approval. Private groups require the owner of the group to add members to the private group.

3.1.1 To create a new group:

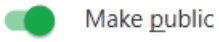
Click

- Enter the desired name of the group.

  Select the desired members by clicking on the member in the directory or typing their name.



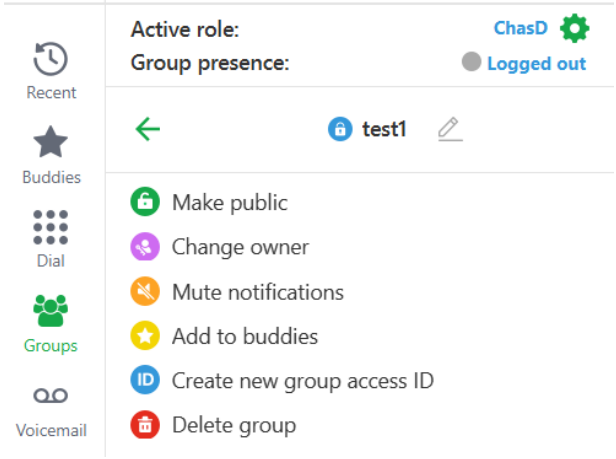
- Check the box if the Group is to be a Public type group. By default, newly created groups are private.



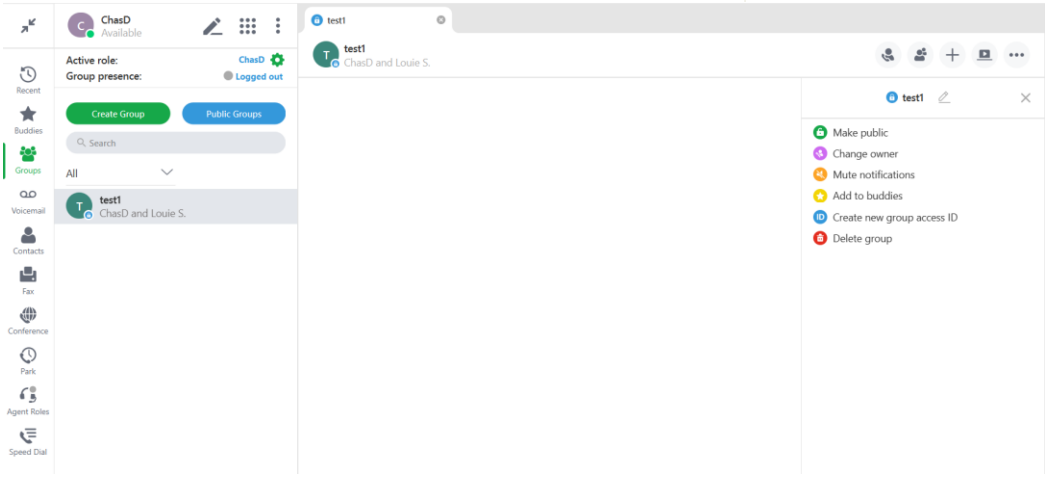
- Click

3.1.2 To edit a group:

Right click on the desired Chat group and select Info:



Compact mode



Full mode

Select the desired option you wish to perform on the group.

Rename(pencil icon) – Allows you to rename the group

Make Public – Changes the group from a private type to a public type.

Change Owner – You may transfer the ownership of groups you created to other users

Mute Notifications – This allows the user to mute popups and missed activity indications in the navigation panel. This can be useful for extremely active groups with a large number of messages exchanged.

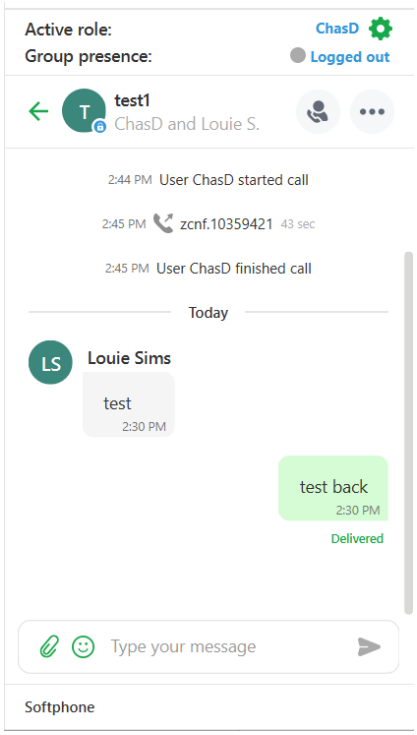
Add to Buddies – This action will add the group to your buddy list.

Create new group access ID – This allows the user to change the access ID that is associated with the group.

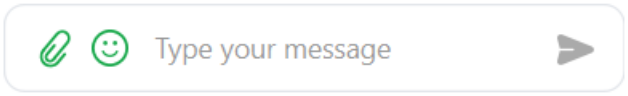
Delete Group – This action will delete the existing group. You will be prompted for a confirmation to delete.

3.1.3 To view/converse the group chat:

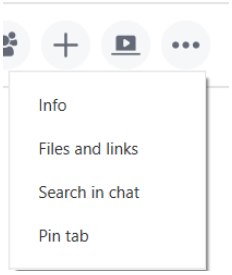
- Open the desired Chat group by clicking on the group. The group chat screen will appear.

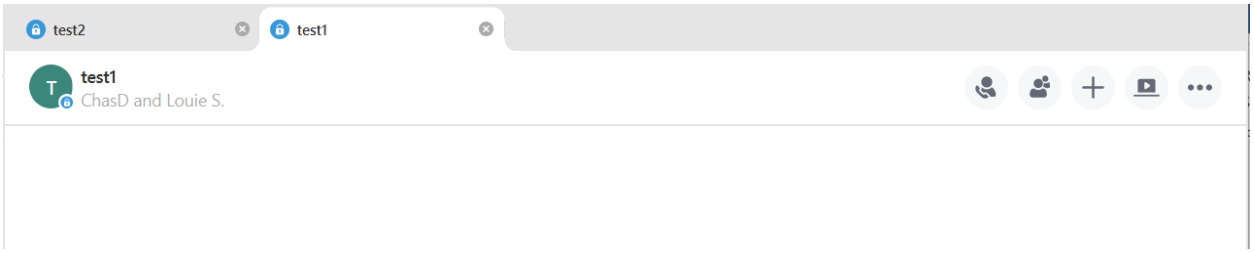


You will see the most recent message threads. Type your text in the text box and press to send or press ENTER key on the keyboard.



In expanded mode, each group will open as a separate tab. You may pin the tab to keep it on the screen and move from tab to tab.



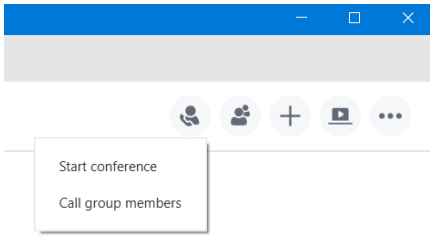


Group notifications will appear in non-focused tabs so you are aware of activity.

3.1.4 To create an MXconference when in a group chat:

3.1.4.1 Start conference

While in the desired group, select



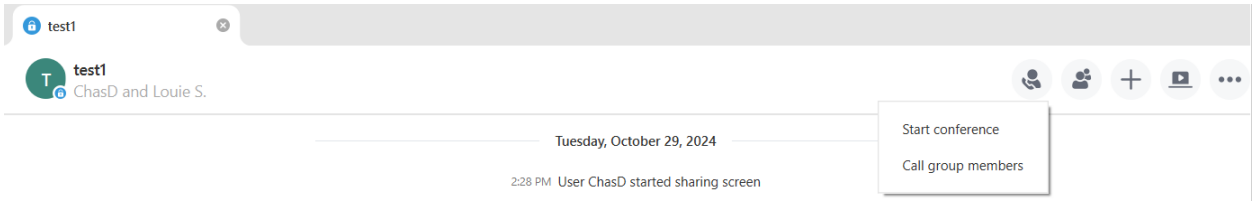
Click the Start conference option.

A conference call will begin. Your audio device will ring indicating a conference call. Answer the call to start the MXconference.
A group text will be sent stating the conference call has started. When the call ends, a group text stating call ended is sent.

3.1.4.2 To create an MXconference by calling group participants first:

While in the desired group, select

Select the Call group memebers option.

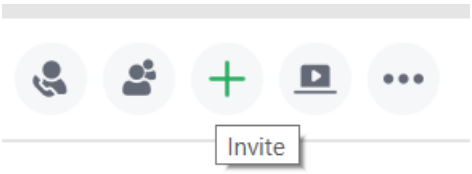


An MXconference is created and each participant is called by the MX system.
When they answer, they will hear "connecting now" and be placed into the MXconference.

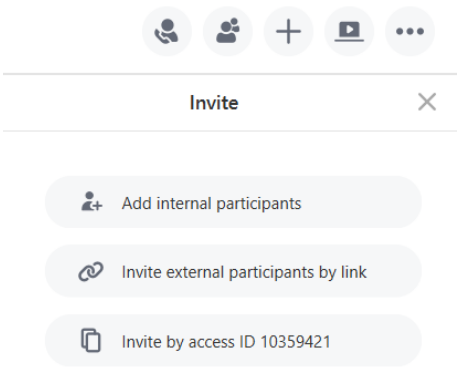
3.1.5 Invite external guest users to Chat session

This feature will allow you to send a link to an external guest and have them join the Chat session. Guest users may chat, participate in audio/video conferences, file share and screen share with group members.

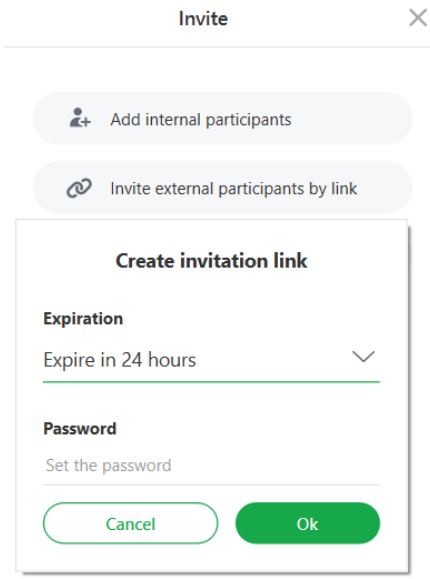
Click the Invite button in the Chat group session:



Select Invite external participants by link:



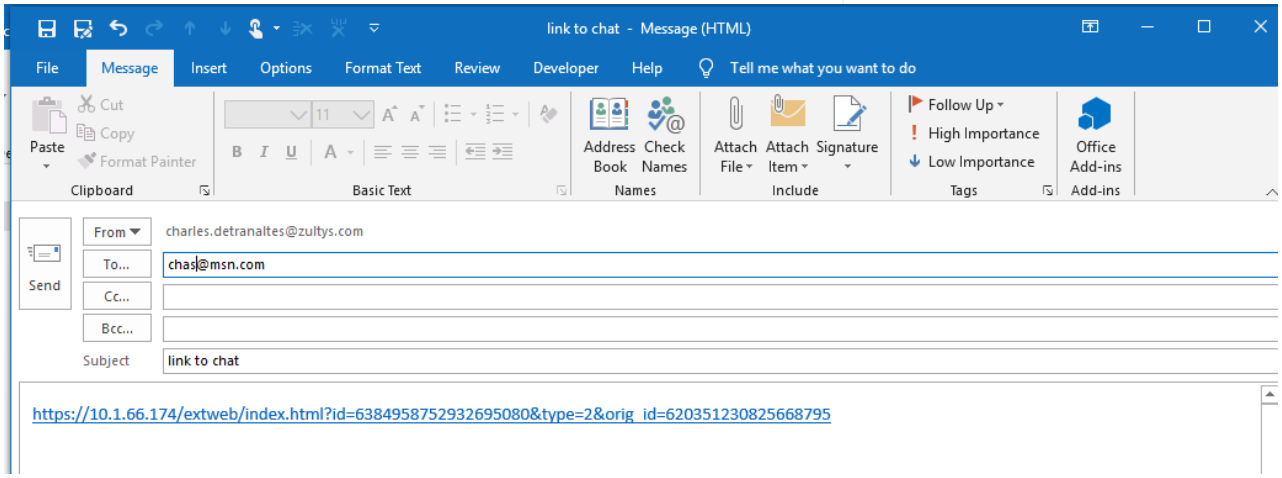
Set an expiration time for the link (default = 24 hours) and enter a password (optional).



Click OK

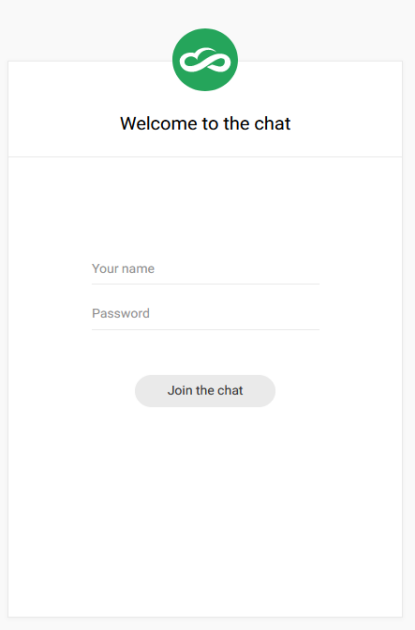
Note: The link is now copied into the clipboard.

Paste the link into an e-mail and send the link to the external party:

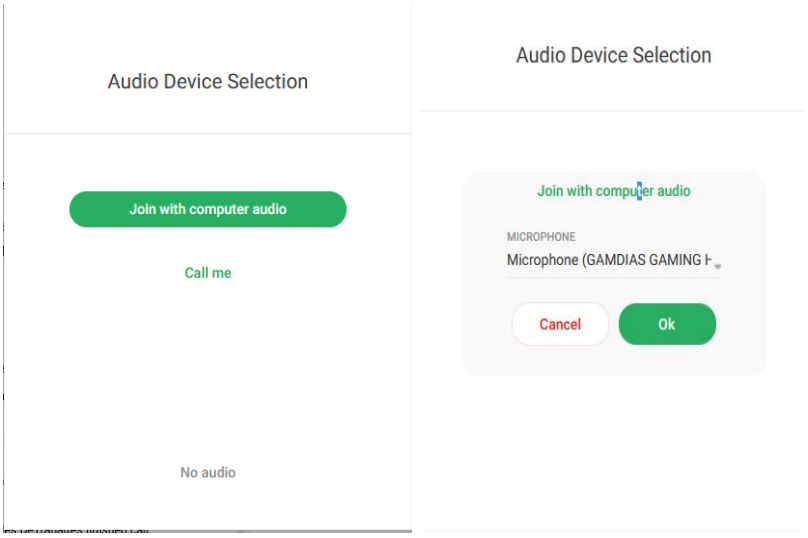


3.1.6 External Guest operation

When the external party clicks the link, they will receive an invite in their web browser.



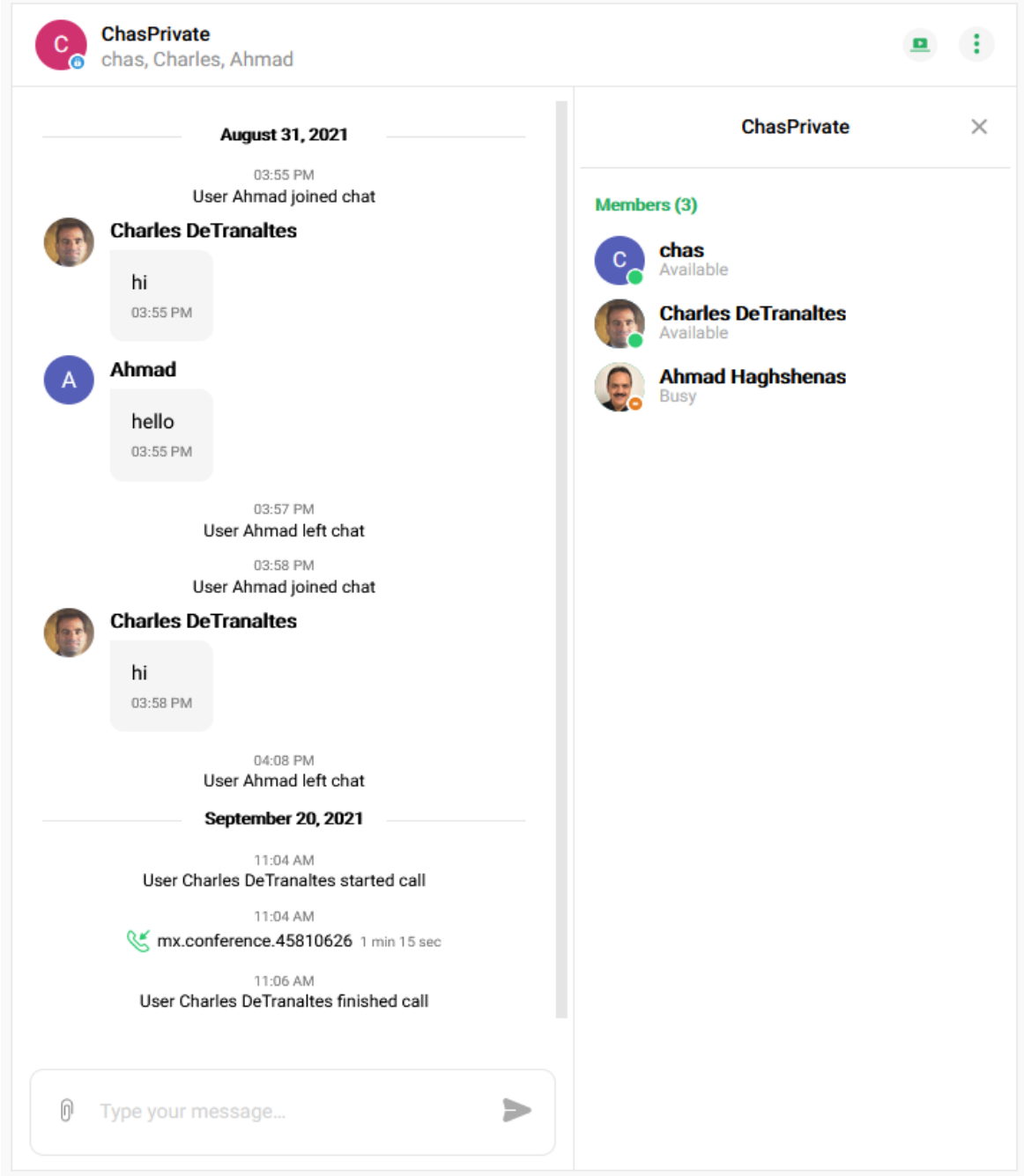
They enter their name, password (if configured) and click Join the chat.



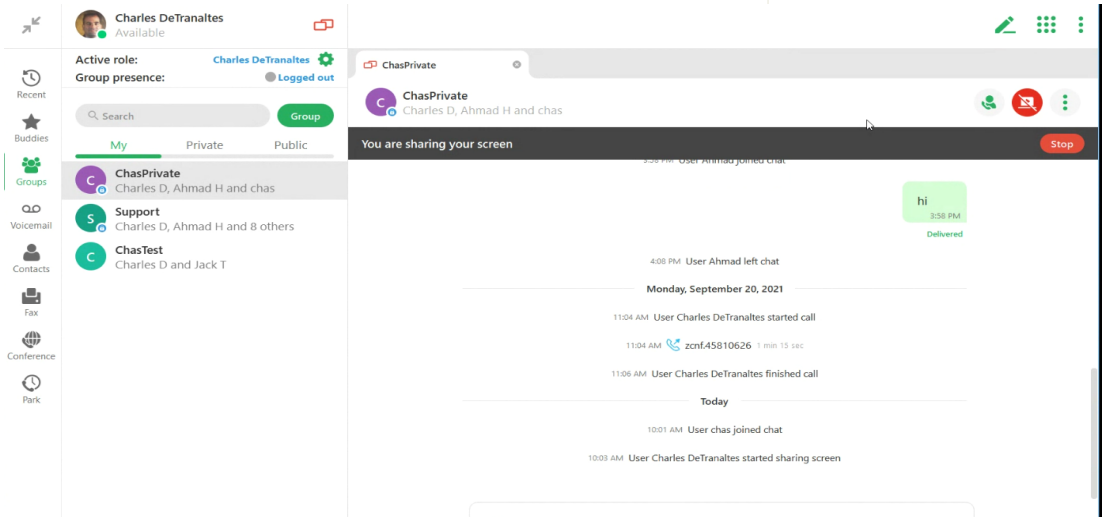
They can select their audio device **(only computer audio is supported**). They may have to select some additional options based on the audio devices installed on their computer.

- **Main guest screen**

The external user will receive a web based Guest screen. This screen provides all the controls for the guest user to collaborate with group members.

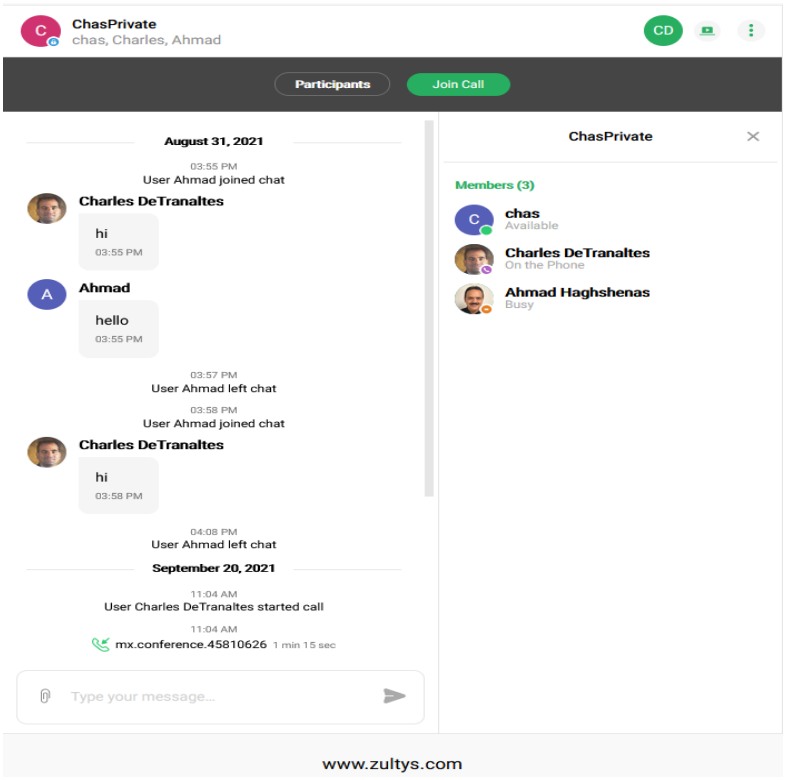


- **Guest viewing a screen share**

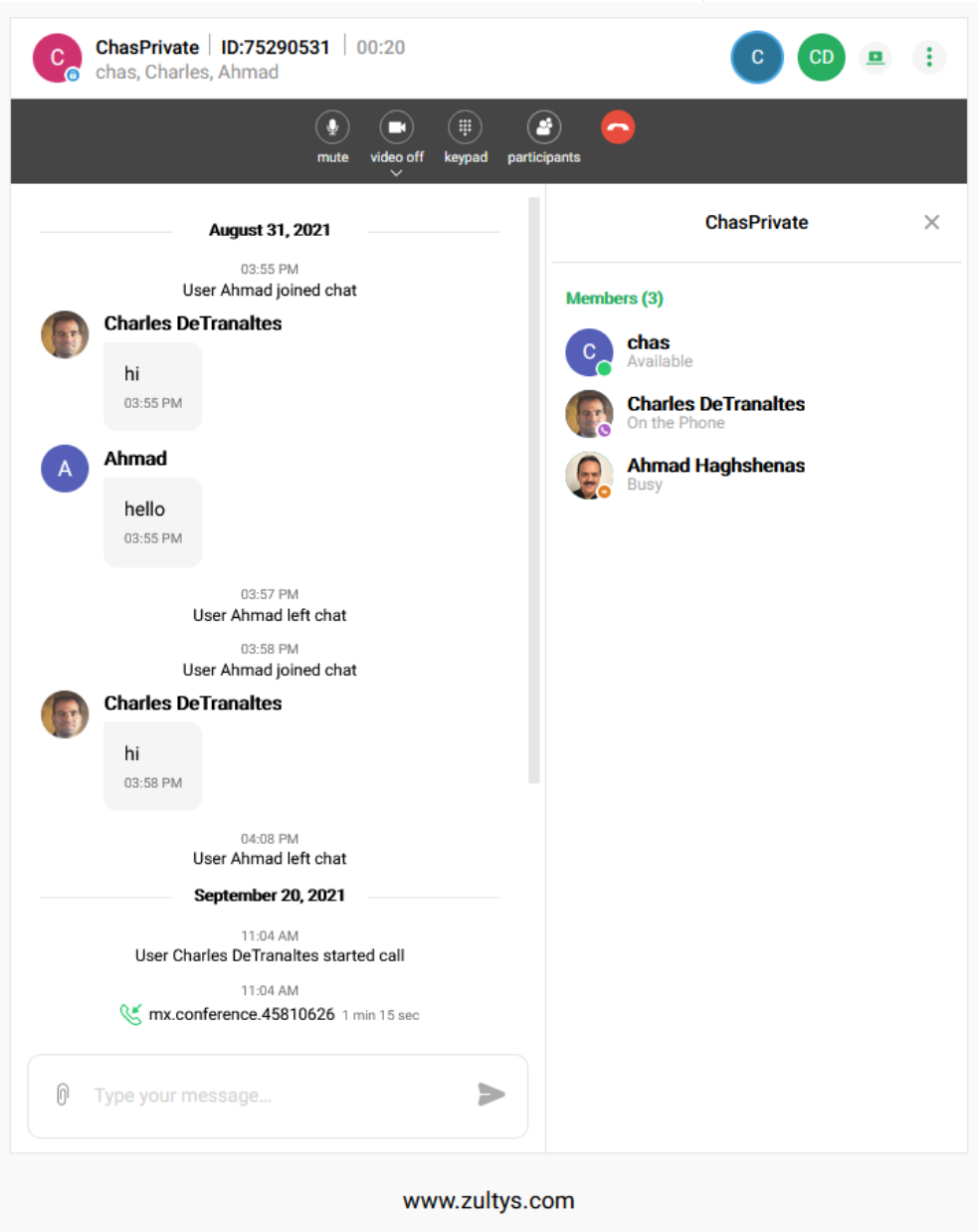


Click Stop to end the viewing session.

- **Joining a conference call**

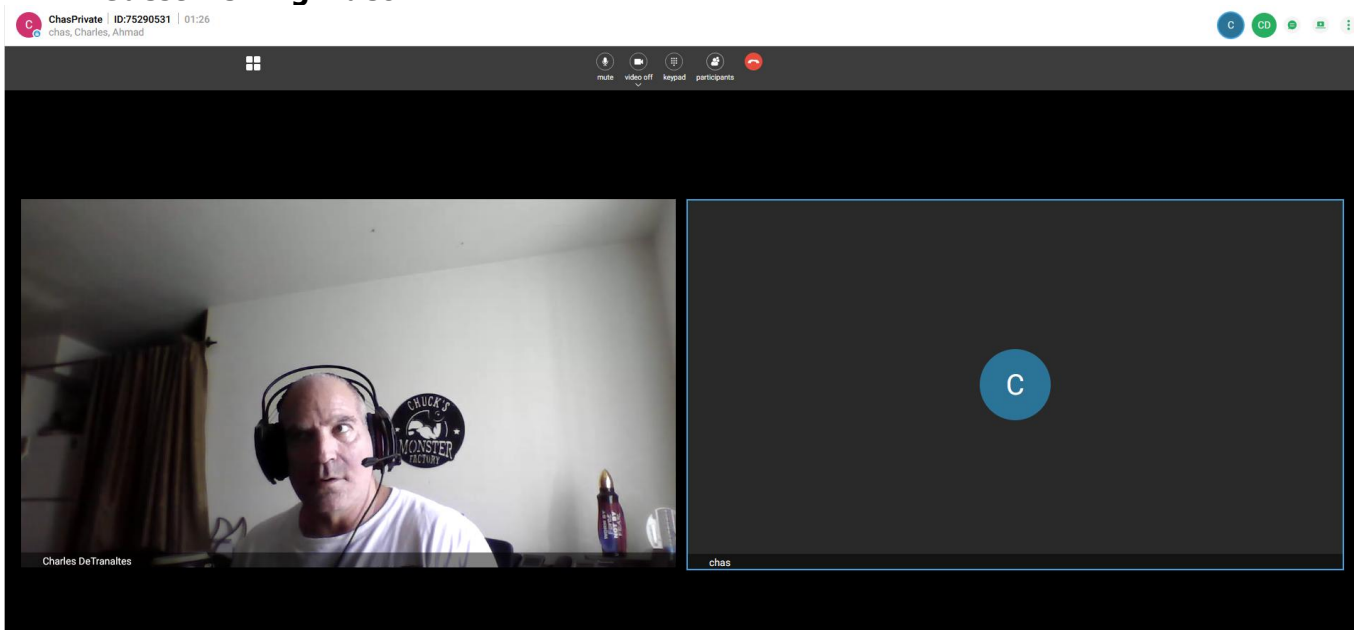


Click the Join call button. You will be placed into the MXconference with other members.



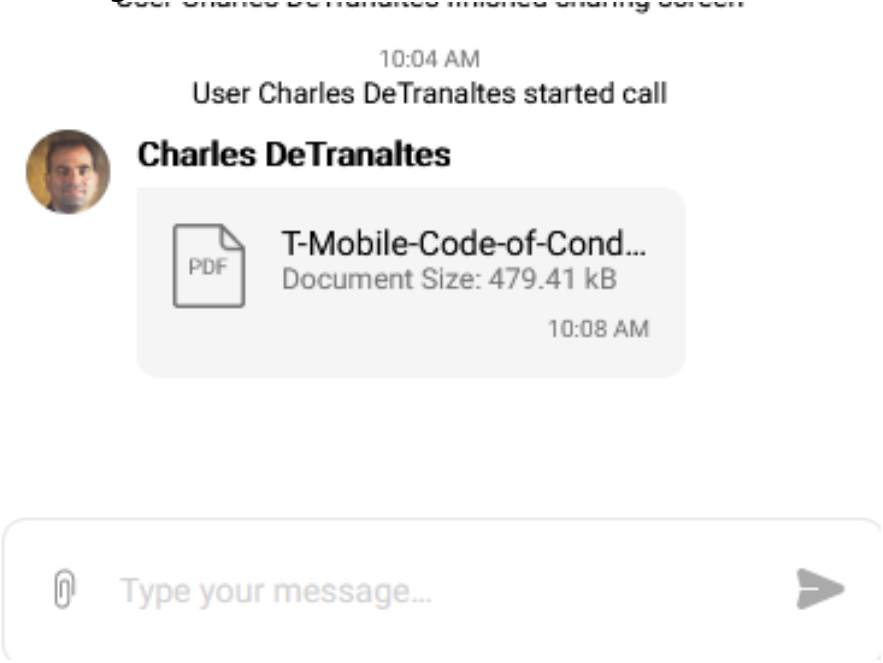
www.zultys.com

- **Guest viewing video**



Click the video on/off button in the control menu to enable/disable the camera.

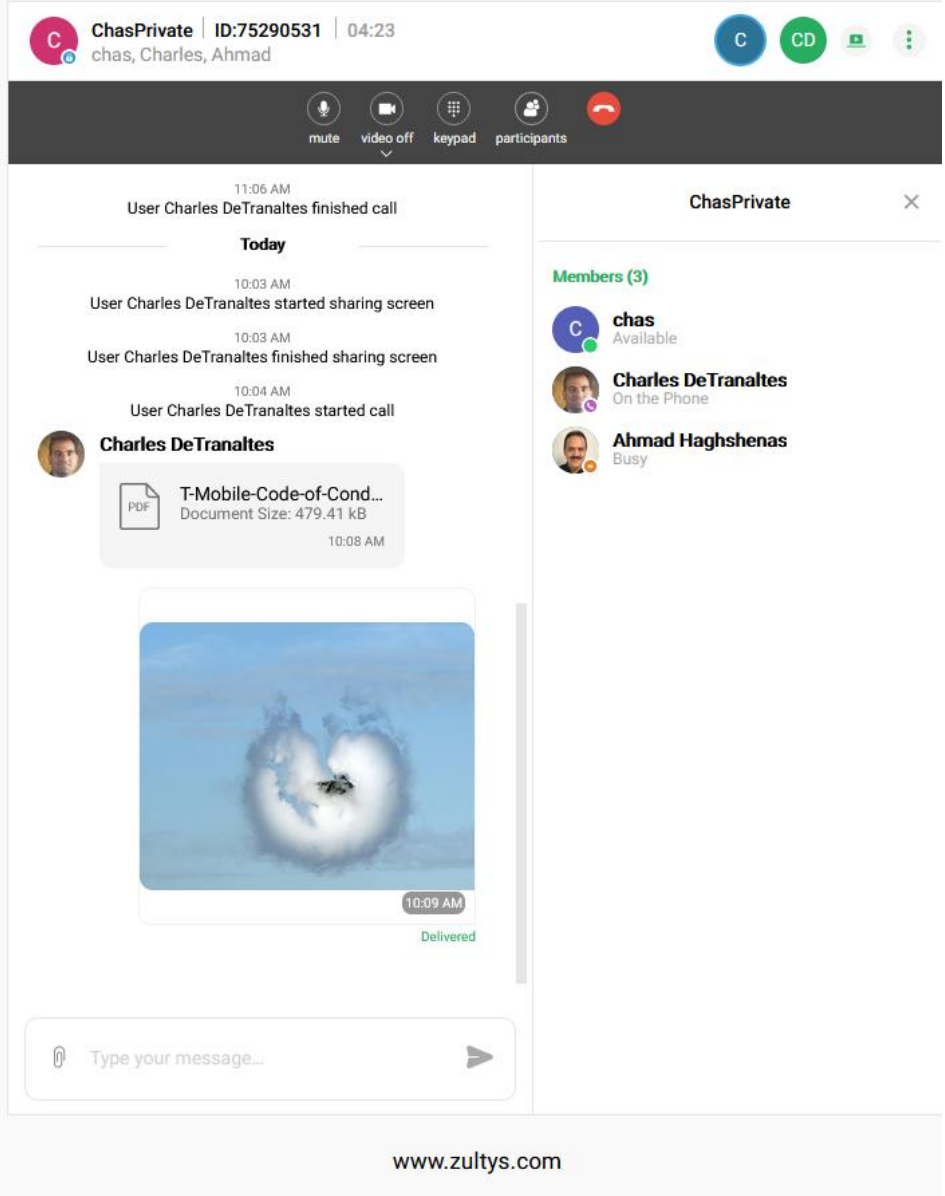
- **Guest receiving file share**



- **Guest sending a file**

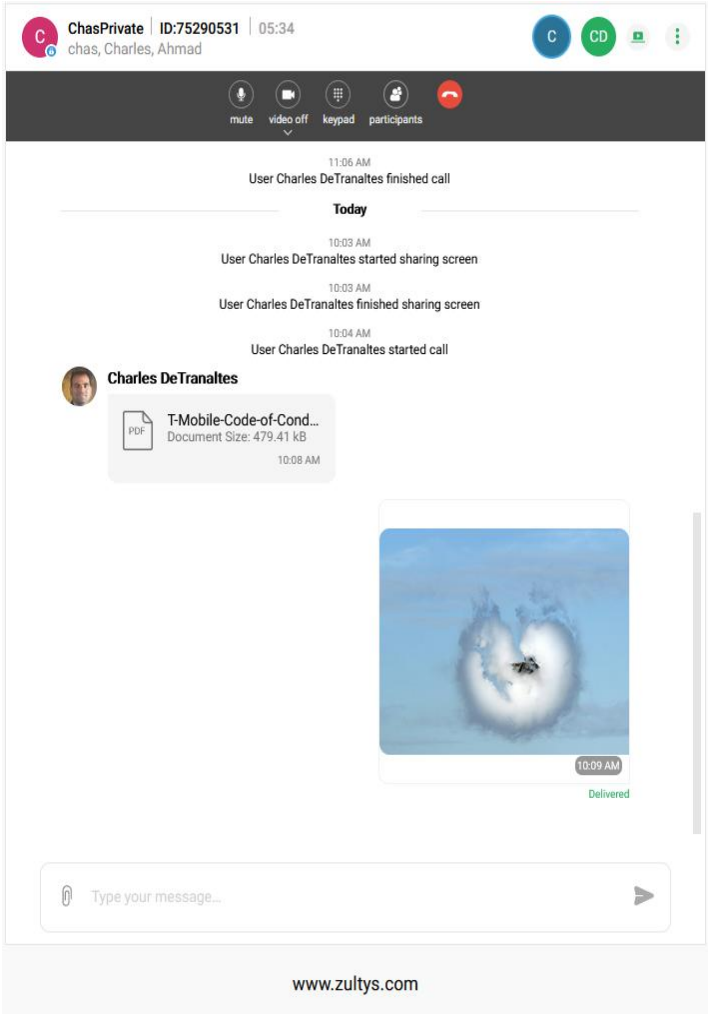
Click the paperclip icon in the chat area.

Navigate to the desired file and click open. The file is sent to all group members.



- **Minimizing participant screen**

Click the X next to the group name /member list to hide the participants.



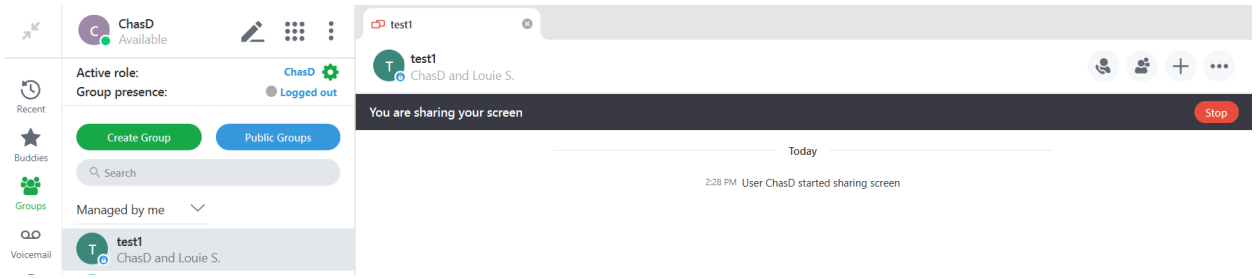
3.1.7 Screen Sharing

You may share your screen with other group members in a Chat session (internal and external) or when you call a user.

NOTE: You must be in expanded screen mode to utilize this feature.

3.1.8 Chat session

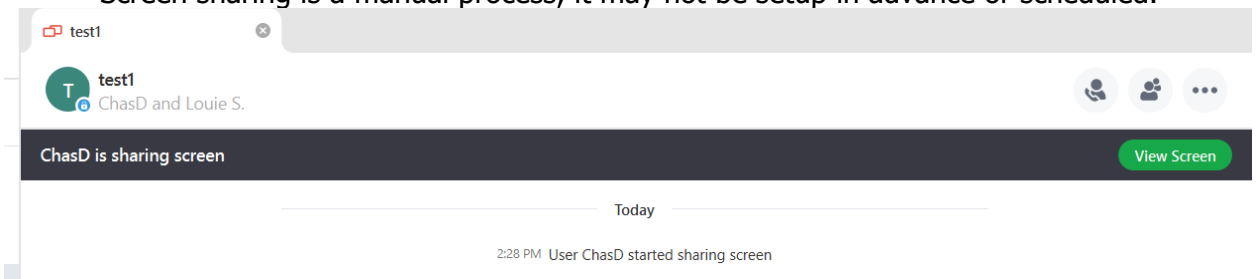
- While in the Chat group or user chat, click the share screen icon. Participants' are notified that you started your screen share and will be viewing your screen.



- Users in the Chat select the Join screen sharing session to view the presenter's screen:
- When you are finished sharing your screen, click the Stop button. Participants' are notified that you stopped your screen share.

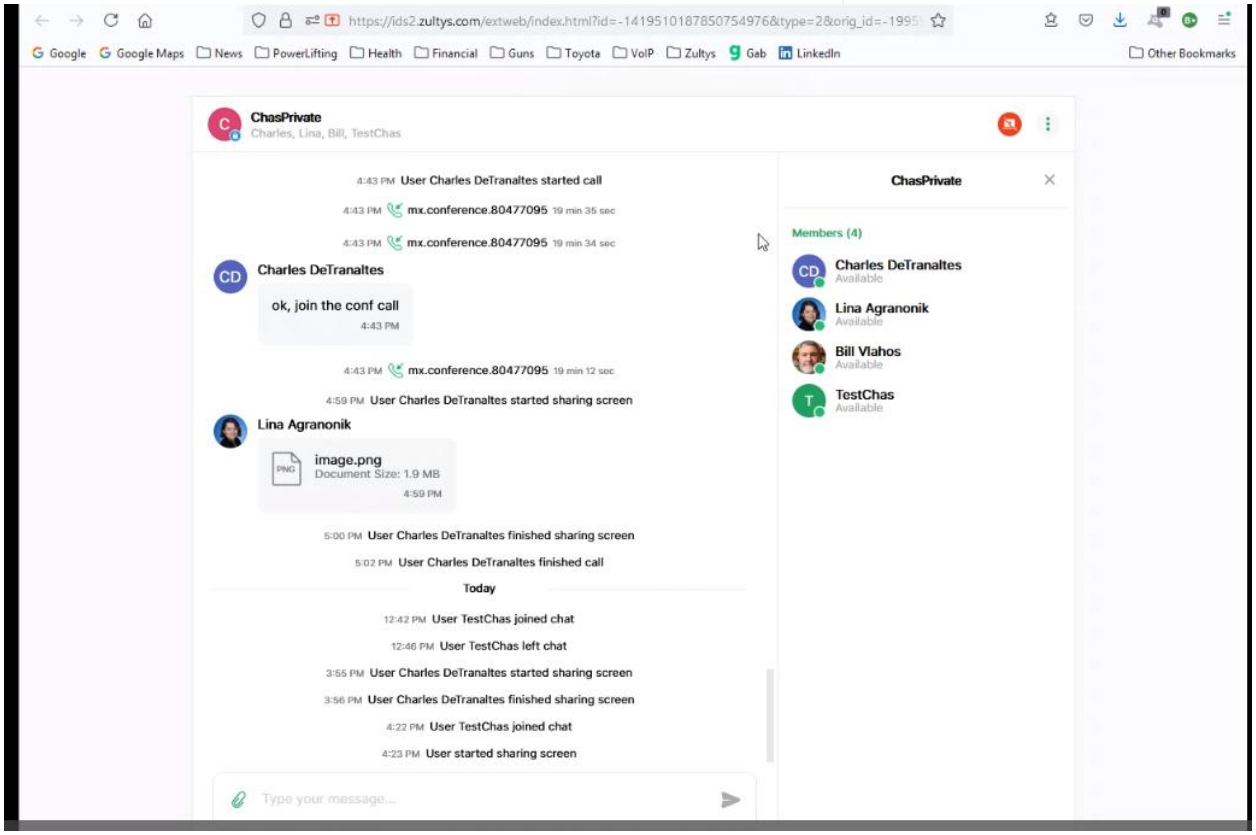
Not that the screen share supports from one presenter to other members in the chat only.

- Presenters cannot be changed
- Screen sharing is a manual process, it may not be setup in advance or scheduled.



External user share

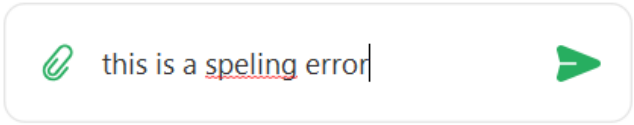
Viewing ext user screen:

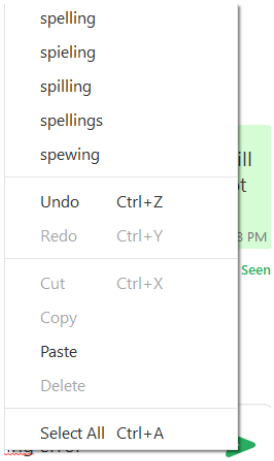


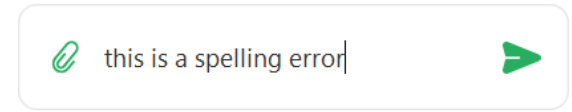
3.1.9 Spell check

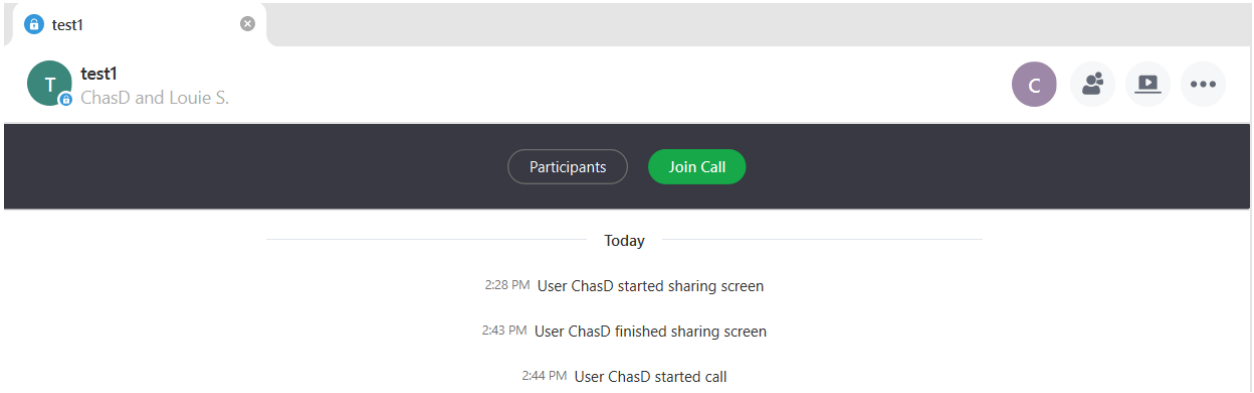
You may utilize a spell check while in user or group chat.

Right click on the mis-spelled word and select a replacement:



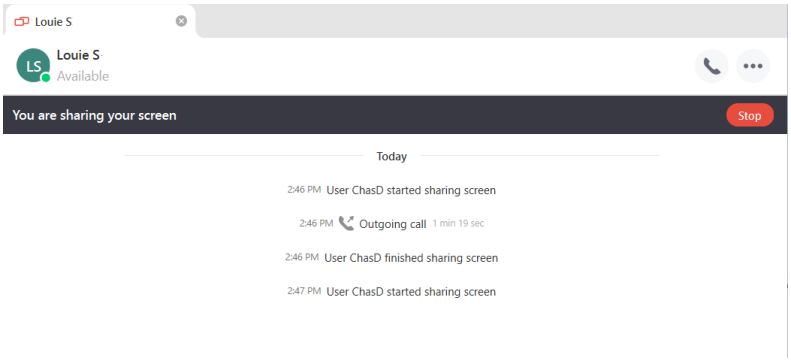


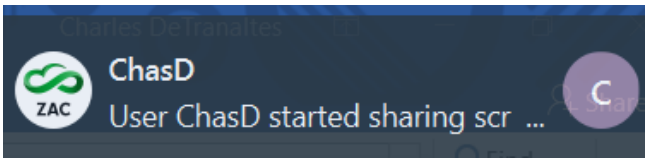




3.1.10 Call session

While on a call, click the Start screen sharing:





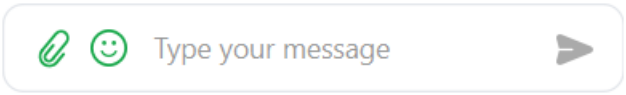
The user can click View Screen to view your screen.

When you are finished, click the Stop icon to stop the screen sharing.

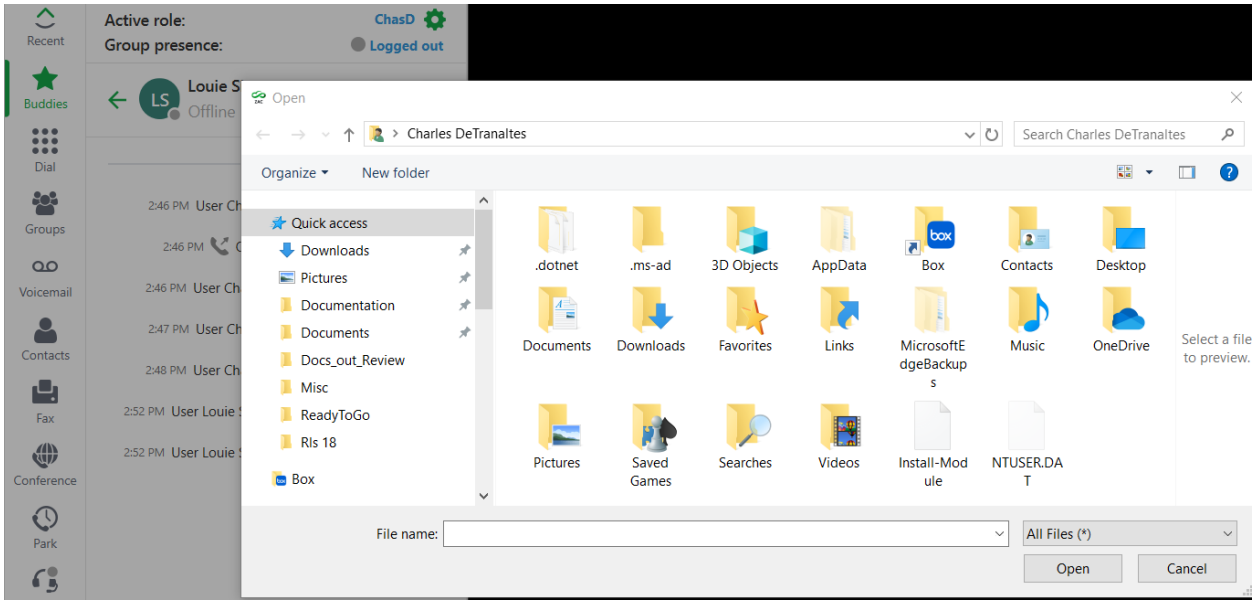
4 File Transfer

File transfer can be used in private (user to user) and group chat sessions. File transfer allows you to send a file to another user/group members. Users can download or view the file after they accept the file from you.

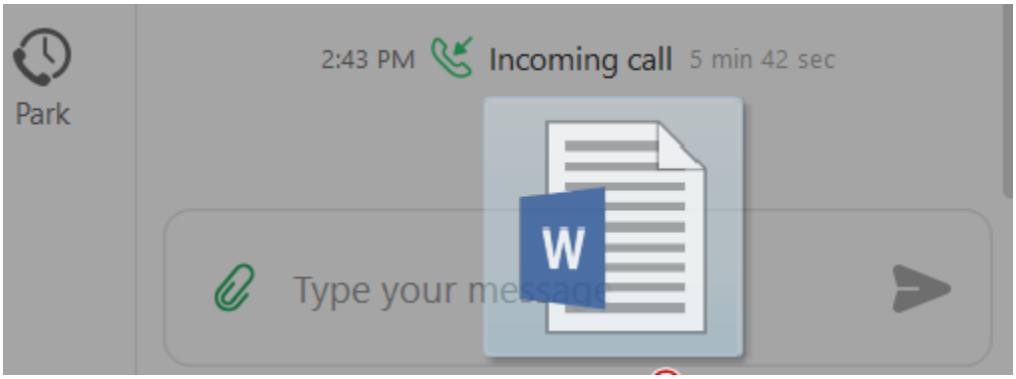
While in a Chat session with another user, select the Attach file icon in the text box window.



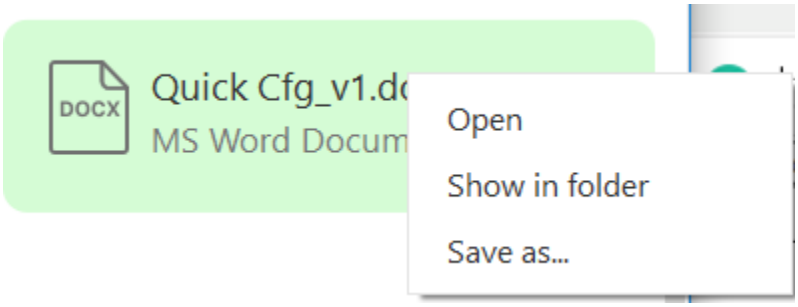
A file explorer window will open. Navigate to the desired file.



You may utilize drag and drop the file to the chat window to send the file.



The user will receive the file.



Right mouse click will display the option menu:

Open – Opens the file in the native program.

Show in folder – Displays the file in the Windows file explorer screen.

Save as – Saves the file to the storage location the user chooses.

4.1.1 Screenshot

You may paste screenshots you captured to the clipboard into a user chat.
After you capture the desired screenshot and while in a user chat, press CTRL-V(Windows) CMD-V(Macintosh) or right mouse click to display the context menu and select Paste.

Note: File Transfer limits:

System	Limit
MX-SE, MX-E,MX-E+,MX-E++	10Mb
MXvirtual	50Mb

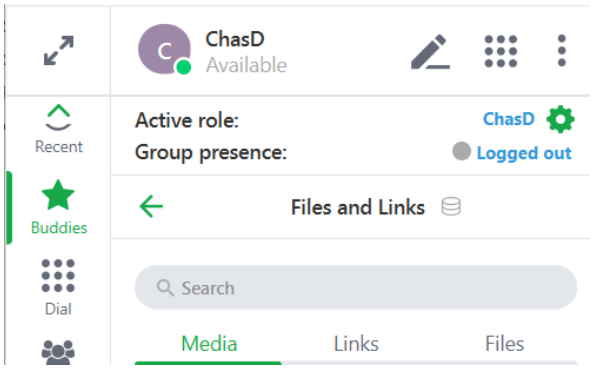
Note: File transfer in ZAC 8.0 is NOT compatible with previous versions of ZAC (7 and below) as well as MX systems running 16.04 (and below).

4.1.2 Recent Images/Files

When you view a Buddy or Contact, you may display images/files you have shared with that contact.

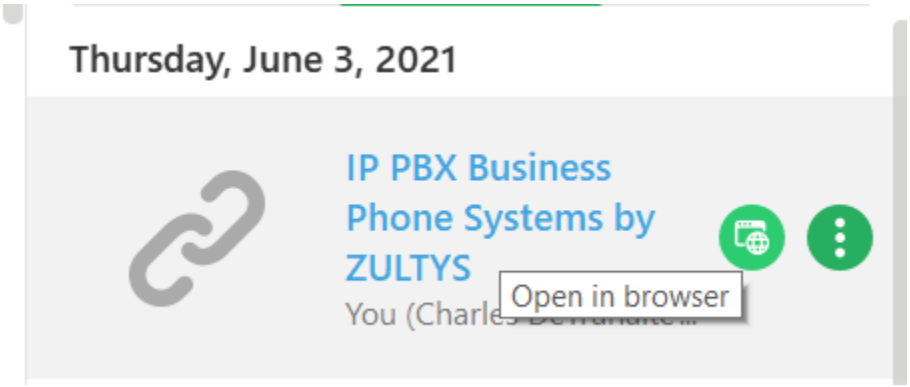
Right click on the buddy/contact

Click Files and Links

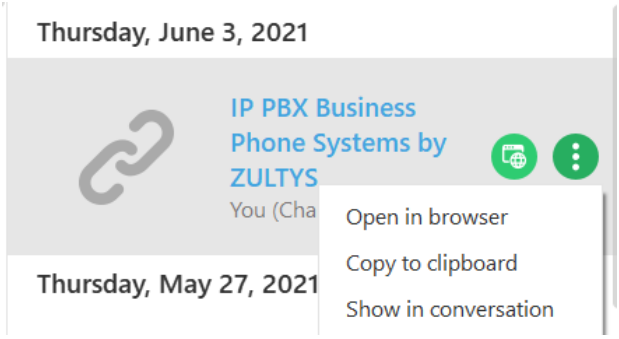


A list of all shared files will appear. You may select to view either media, Links, or Files.

You may open the Link in a browser or preview the link in this screen if the link is capable of providing a preview.



Click the more options icon to display additional options.



Open in browser – Opens the link in a web browser.

Copy to clipboard – Copies the link to the clipboard.

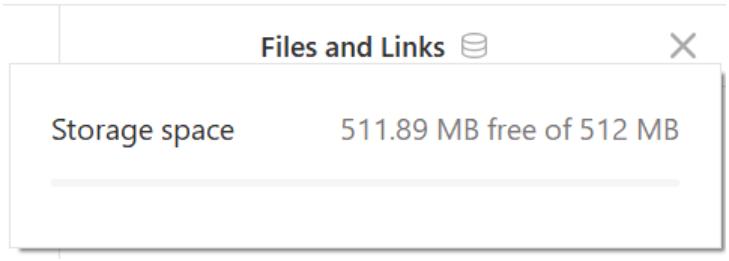
Show in conversation – Places the link in the conversation thread associated with the user.

4.1.3 File/Link storage display

You may view the amount of storage space in use and remaining for files and links for each user in the system. This may be done from compact or expanded mode.

Compact mode:

Right click the user and select files and links.
Click the storage icon next to the Files and Links title.
The storage space will be displayed.



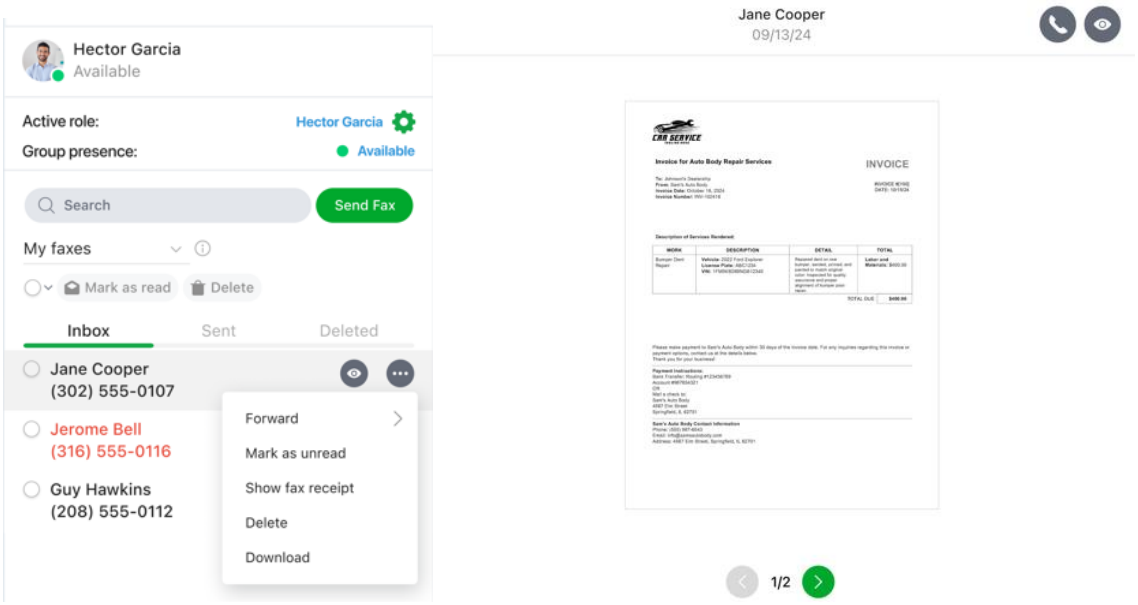
5 Fax

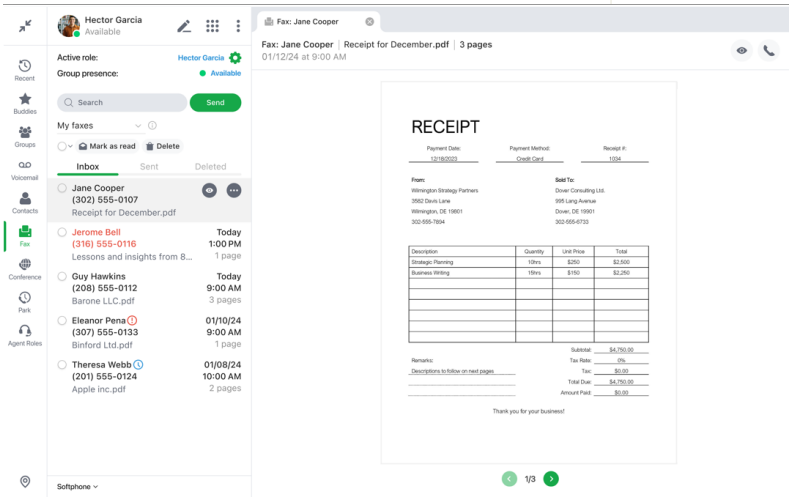
This area allows you to view, send and manage the faxes you have.

5.1.1 View:

You may view faxes in your inbox, sent, and Deleted tabs.

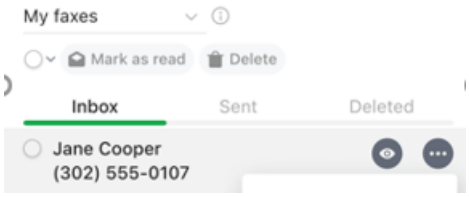
Click Fax from the menu bar.
Click the folder Inbox-Sent-Deleted
Right mouse click on a fax to present options.





5.1.2 Bulk Fax operation

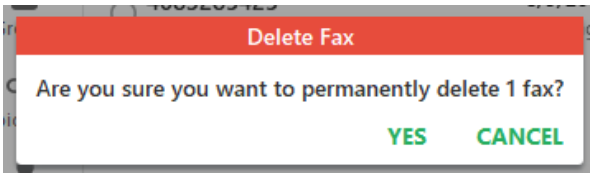
You may mark faxes as read or delete using the quick action icons at the top of the fax list.



Mark as read –
To mark all faxes as read/unread click the faxes you want to mark and then click the Mark as read icon.

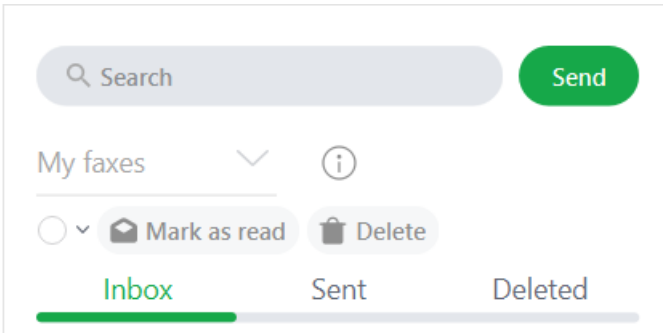
Delete multiple or all faxes –
To delete multiple click the faxes you want to delete and then click the Delete icon.

Click Yes to confirm the deletion in both cases.

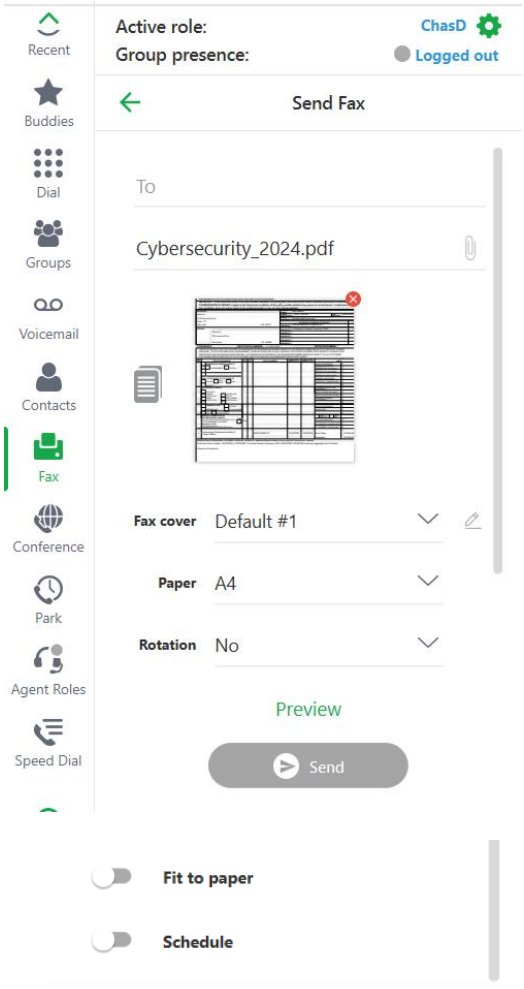


5.1.3 Send

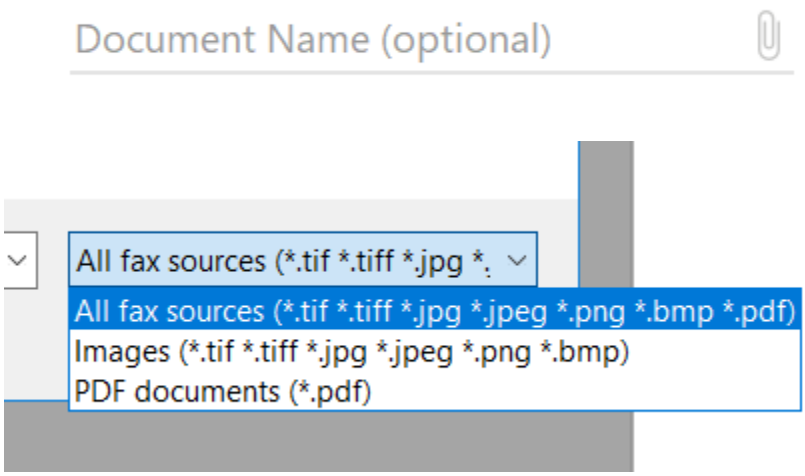
Click Send to create a new fax.



Enter the fax number to send to and press ENTER.

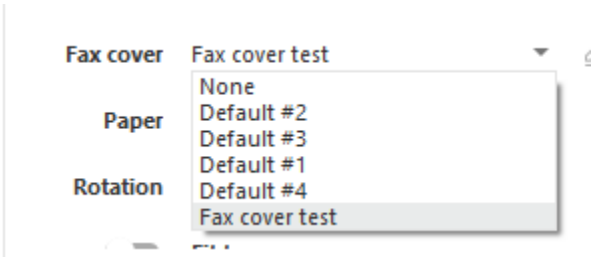


Attach the desired file.



Note that only (.jpg, .jpeg, .png, .bmp, .tif, .tiff, and .PDF file types are supported).

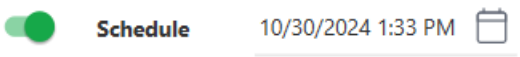
Select a fax cover page if desired from the list.



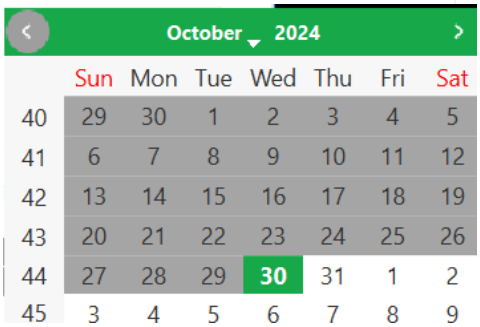
Click Send

You may also schedule a fax to be sent at a predetermined date/time.

Click the Schedule checkbox.



Enter the desired date/time and desired parameters.



Click Schedule.

5.1.4 Fax receipt

You may view a fax receipt after sending a fax that displays sender information, date, type, number of pages, and the fax result.

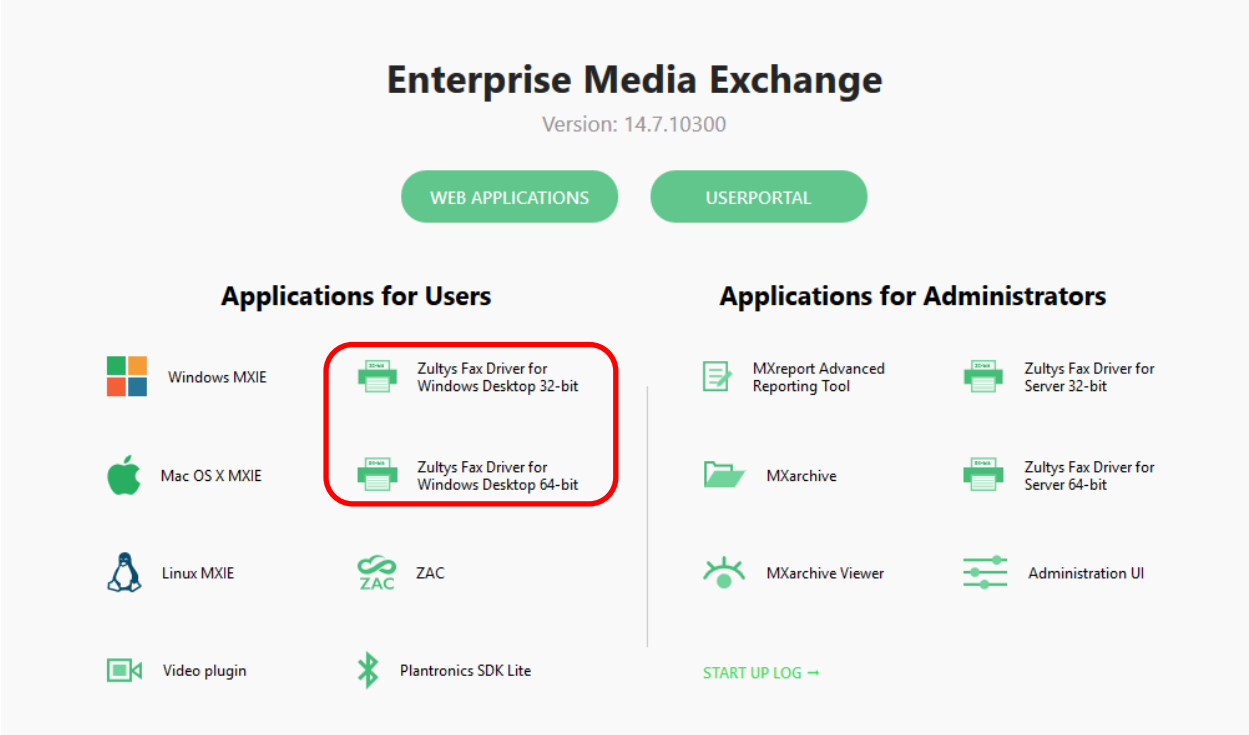
Right click on a fax item
Select Show Fax Receipt

The receipt information is presented in a separate window

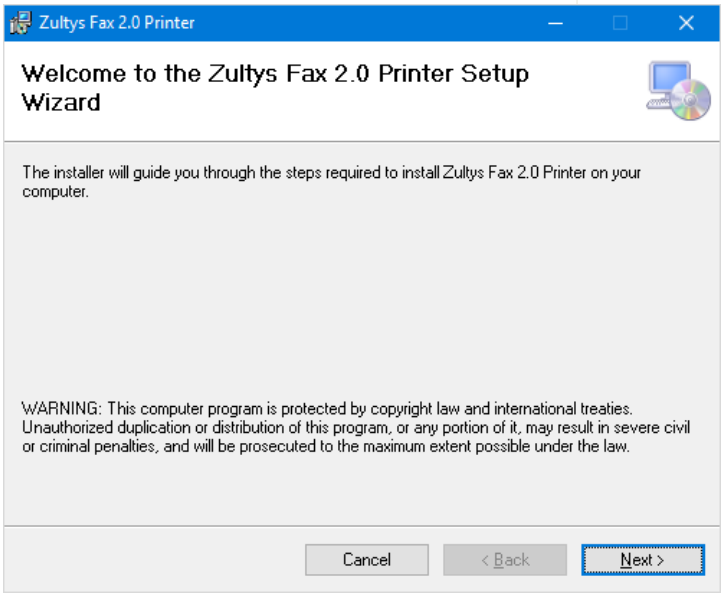
5.1.5 Print to Fax (Windows only)

The Zultys Fax Driver will be used to install a printer on your Windows PC. The Zultys Fax Driver will install a printer named Zultys Fax to your PC. This printer will be available from your applications to be used to send the document to ZAC as a properly formatted fax file. Before installing the Zultys Fax Driver, you must download the software from the MX system through the MX browser interface.

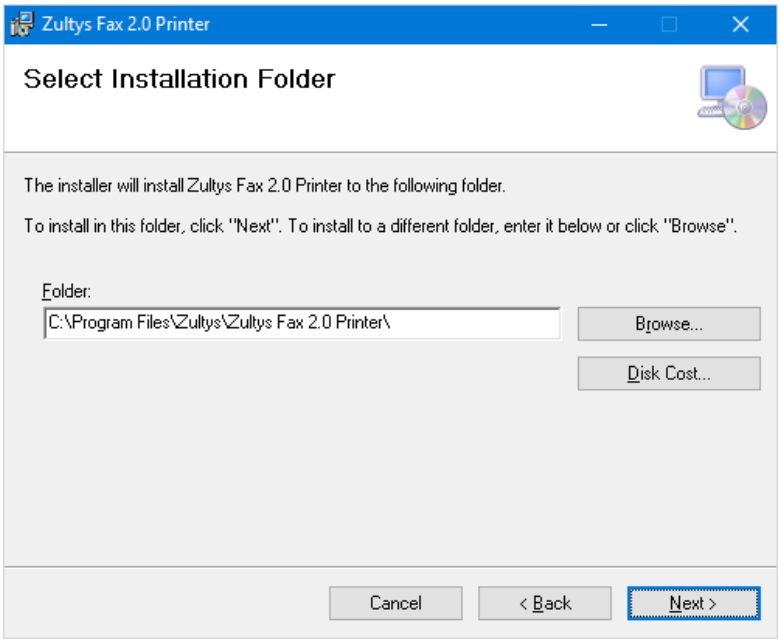
- Close ZAC completely prior to install the FAX driver in Windows.
- Open a browser on your PC (such as Firefox or Internet Explorer) and enter the IP address/domain name of your MX system. This accesses the MX landing page of the system (unless that access has been disabled by the system administrator).
- Select the correct fax driver as shown below(32 or 64 bit). The browser downloads the Zultys Fax Driver software. You may the then install the driver on your computer. Press the Next buttons until application is installed. At the end of the installation press the OK button to complete the installation of the Zultys Fax Driver.



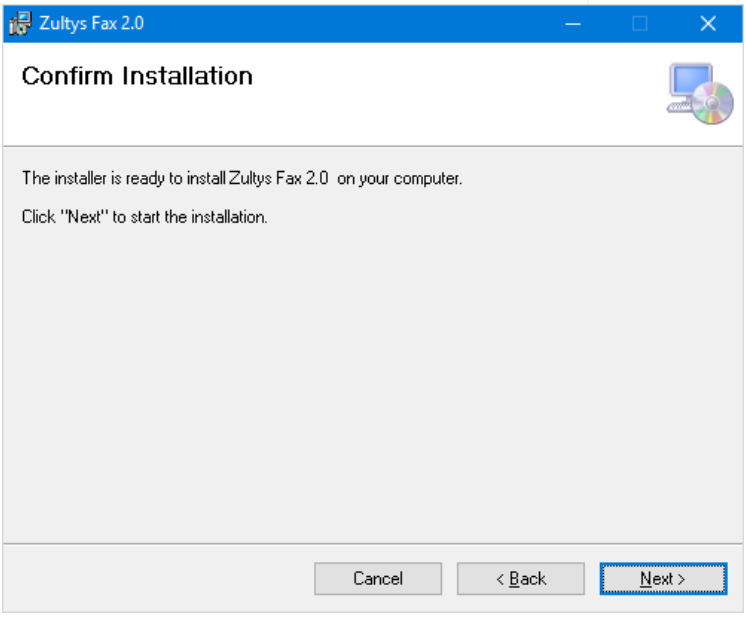
After selecting the appropriate driver, in this example we will use the Windows 64bit driver, double click on the downloaded file:



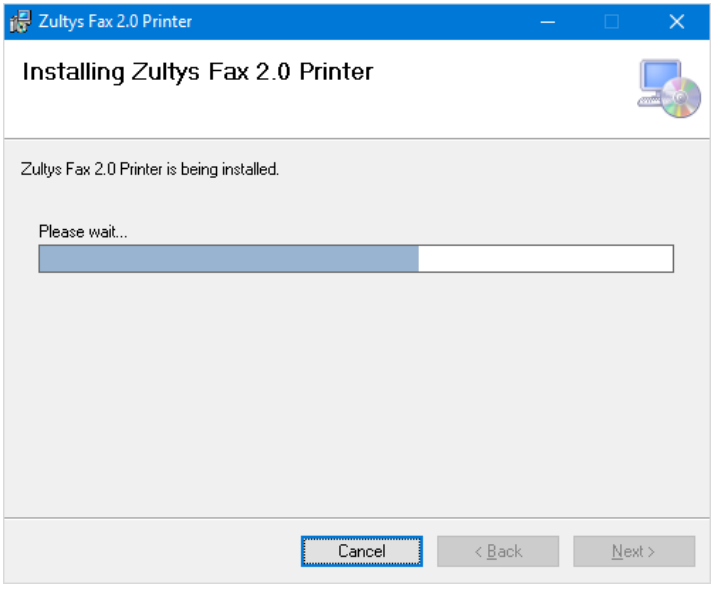
Click Next



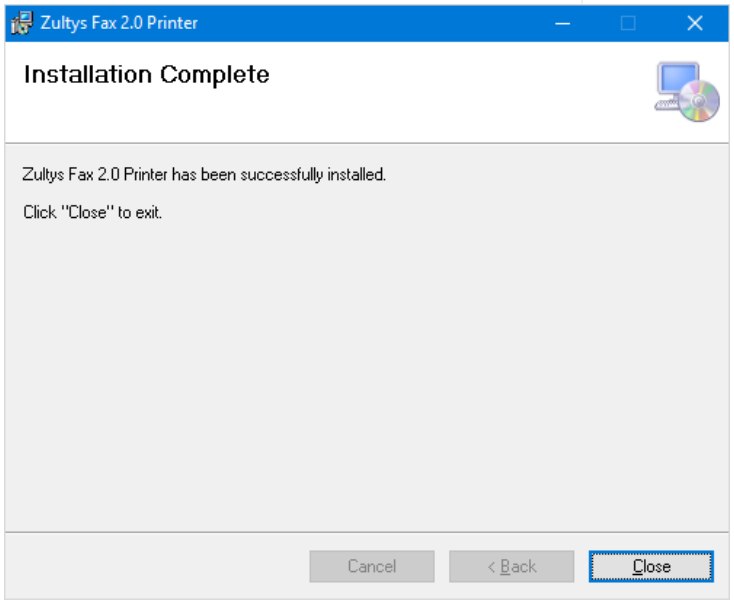
Choose a location, the default location is suggested, click Next



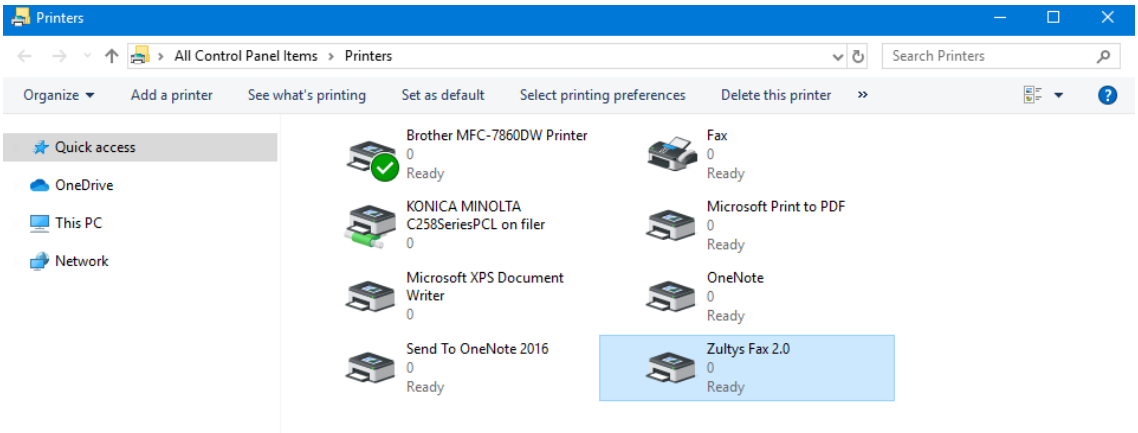
Click Next to confirm installation



After installation a confirmation screen is presented.



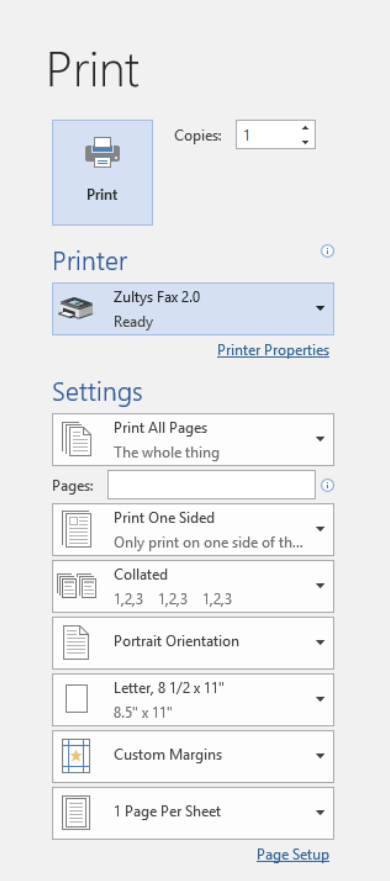
- After installation of the fax driver, you must re-open ZAC.
- To send a fax ZAC must be running.
- After the installation is completed, the **Zultys Fax** printer will be added to your system printer as shown in below.



5.1.6 Sending a fax from the Fax Driver:

Ensure you have configured a MX interface to use the MX fax server to originate and terminate faxes.

- The **Zultys Fax** will be available to all applications that support printing.
- To fax a document, select the **Zultys Fax** as shown using Microsoft Word to fax a word document.

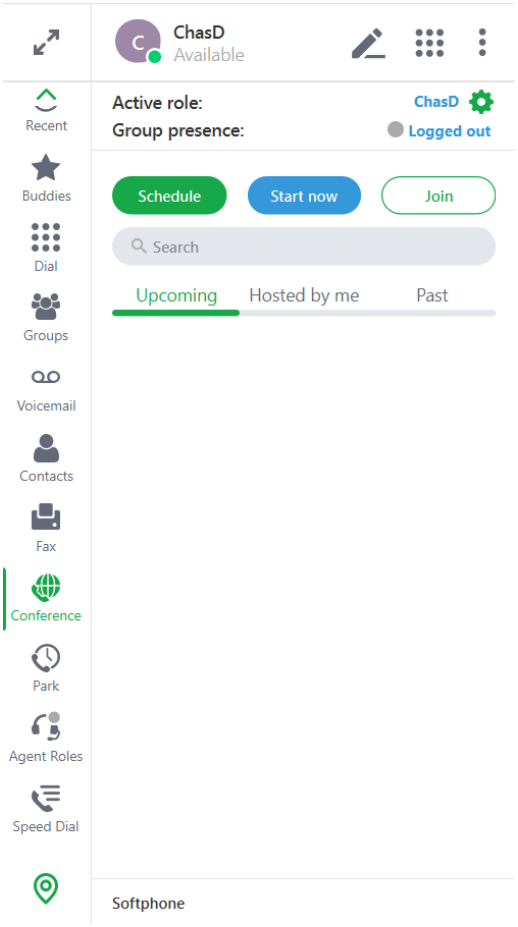


- After the document has been processed ZAC will notify you of additional steps required to send the fax as shown below.

- The fax recipient, schedule, format, and confirmation steps to send the fax are shown below. These steps are performed in sequence and are required to send the fax.
  Enter in the Fax number. You may type to locate contacts in the address book.

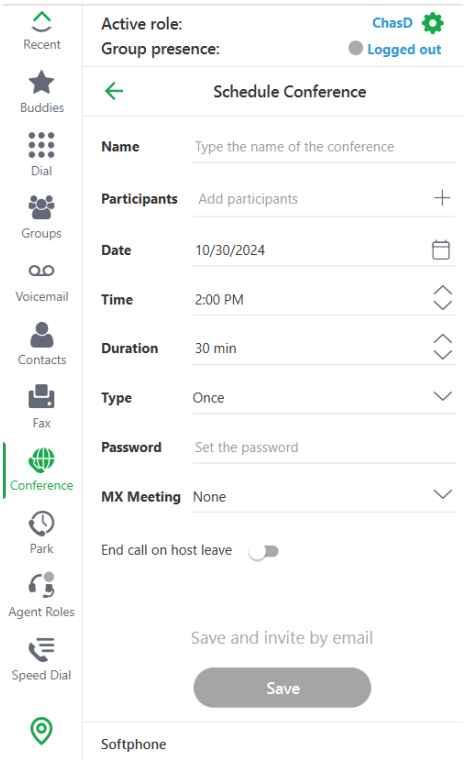
6 Conference

This area allows you to schedule an MXconference as well as utilize an MX external guest link for external guests to join. In addition, you may utilize the MXmeeting application as well.

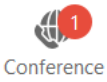


6.1.1 Create an audio conference:

1. Click the conference icon.
2. Click Schedule.



3. Enter the following information about the conference:
Name – The name of the conference participants will see.
Participants – You may select other MX users directly by clicking on the + icon. Check all conference participants and click Save.
Note: Participants will be notified via ZAC of the conference. The conference will also be placed in their Outlook calendar. They click the Join option to enter the conference when it starts. There is no need to e-mail internal users the conference information.

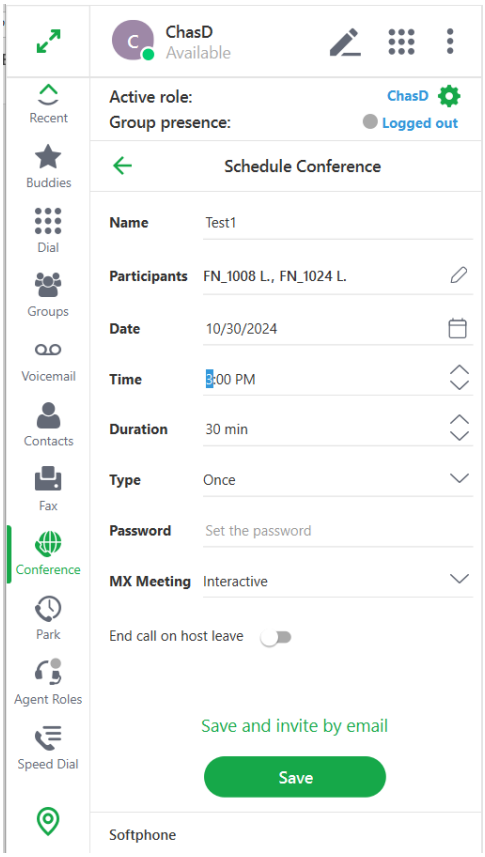


Date – The date the conference will commence.
Time – The time the conference will commence.
Duration – The duration the conference will last.
Type – Select once, recurring, or ongoing.
Password – Enter a password for the conference. The default (empty) entry is no password required.
MX Meeting – Select this option if MXmeeting will be utilized for collaboration. Leave None if MX collaboration (external Guests) is to be utilized for collaboration.
4. Check if the conference is to end when the host leaves. The conference is ended and all parties are disconnected.

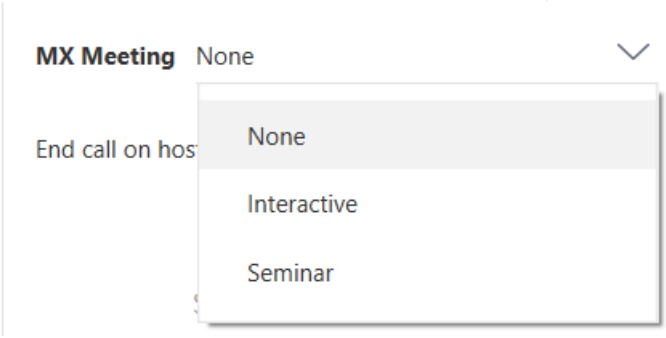
5. Click **Save and invite** to save the conference and generate an Outlook e-mail invite.
6. Click **Save**. This will save the conference. The conference should appear in the conference list:

6.1.2 Creating a conference with MXmeeting collaboration

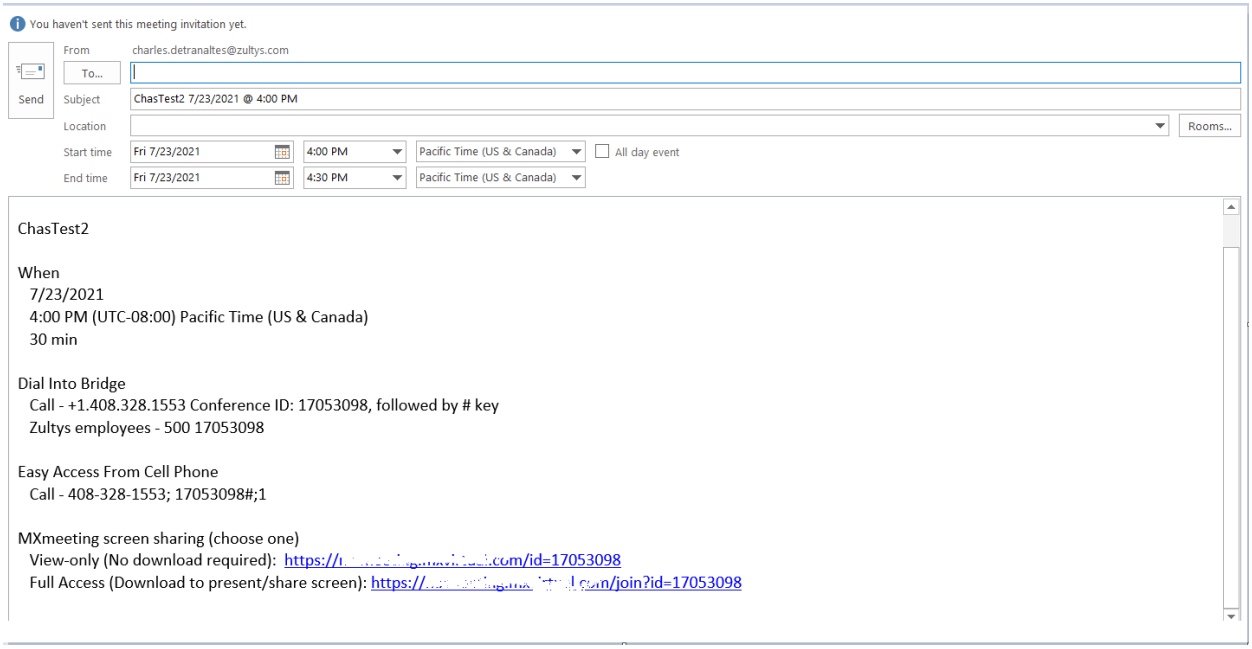
1. Click the conference icon.
2. Click Schedule.



3. Enter the basic information as in the audio conference procedure. To add the MXmeeting collaboration functionality you will edit:
MX Meeting – Select the interactive or seminar options if MXmeeting will be utilized for collaboration.

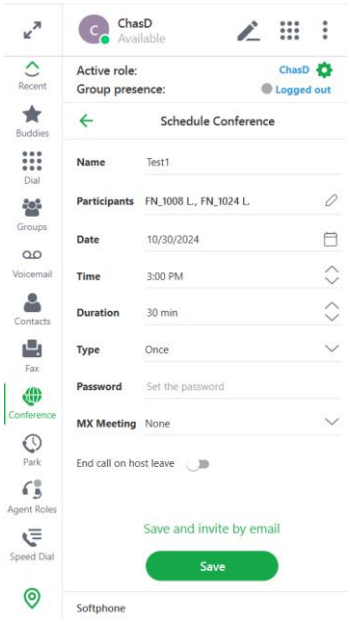


E-mail invitations sent with MXmeeting collaboration set will include the link to join the MXmeeting in the e-mail body:



6.1.3 Creating a conference with MX Guest user collaboration

4. Click the conference icon.
5. Click the options icon and select Schedule.

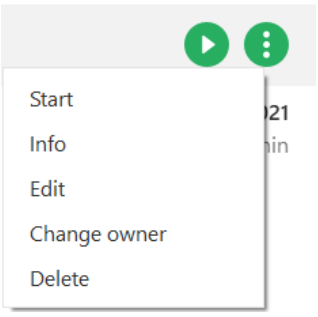


Enter the basic information as in the audio conference procedure. Make sure MX Meeting is set to None.

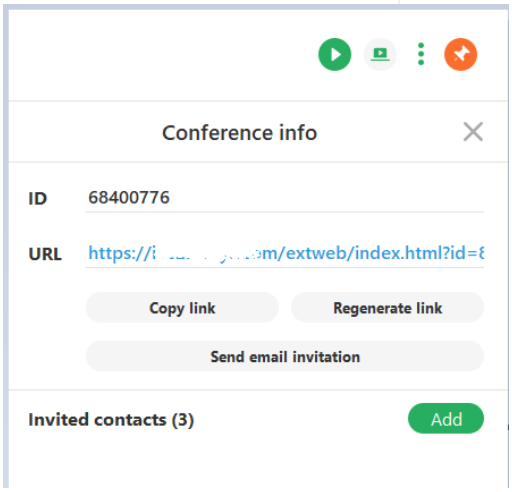
Click Save.

- **Generating and Adding guest link to conference invitation**

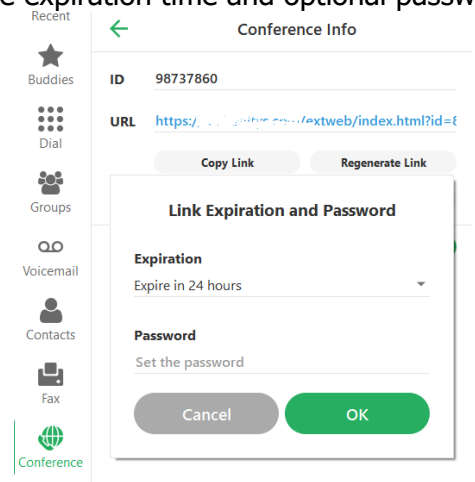
1. Click the desired conference from the list and select the more options icon.



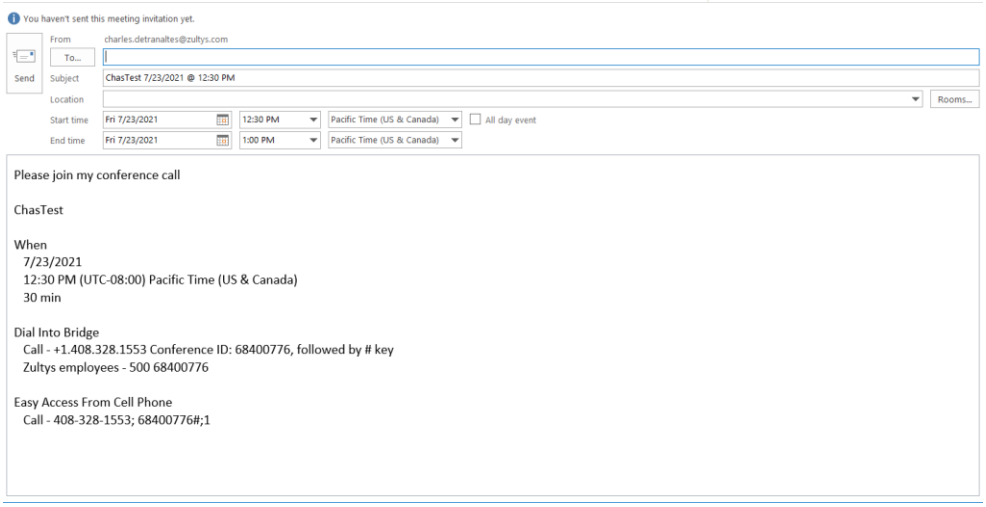
2. Select Info from the options menu.



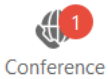
3. If configured, click the Send email invitation button. An invitation will be created and the link associated with the conference is automatically inserted into the body of the e-mail.
   If this option is not configured (check with your administrator) you can manually insert the link as follows:
4. Click Copy link. Enter the expiration time and optional password. Click OK.

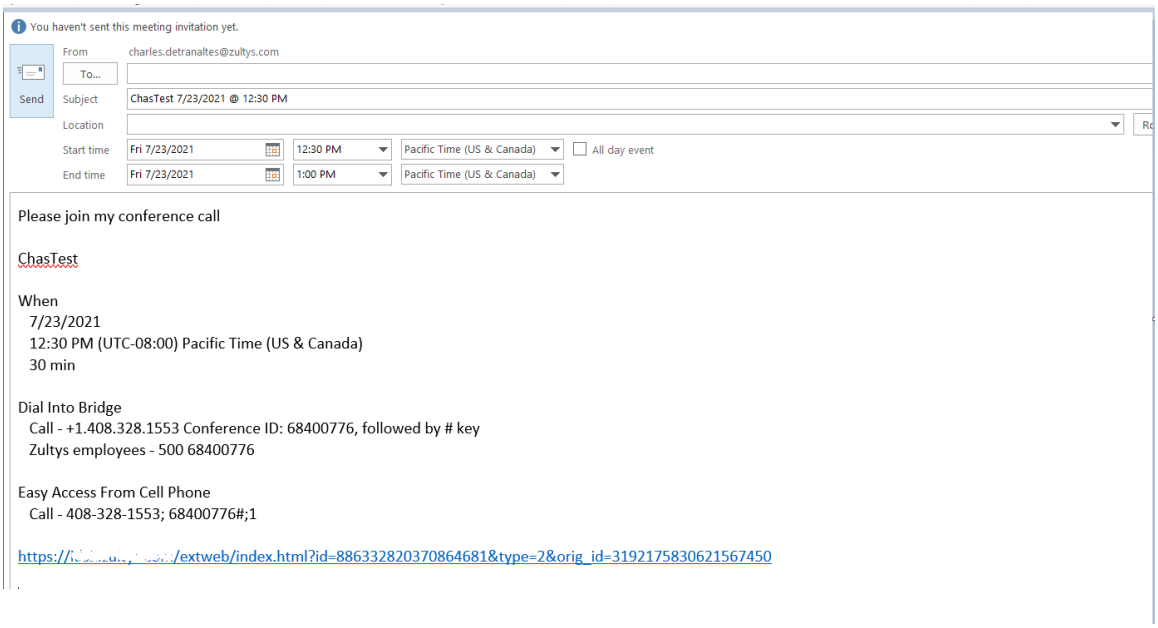


5. Click Copy link. The link is copied to your clipboard.
6. Click Send e-mail invitation. An e-mail invitation is created and displayed.



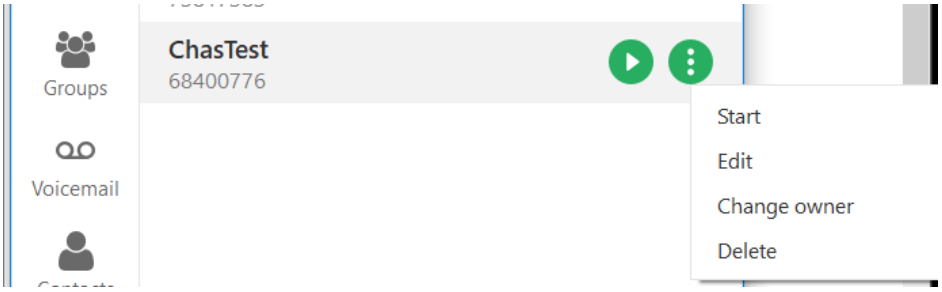
7. If an external Guest link is to be included Paste the link into the e-mail invitation. Send to all participants.
Note: There is no need to include internal participants in the e-mail. Internal participants are notified and can join the conference without the need for access codes.





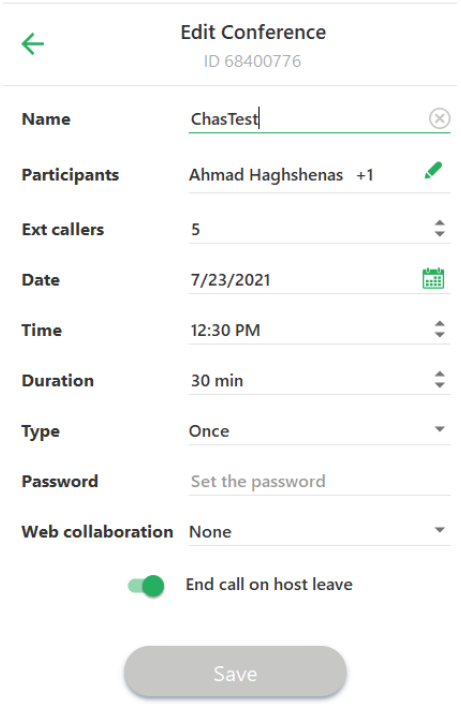
6.1.4 Starting and conference options

1. Click the start button or the options menu and select start to start the conference.

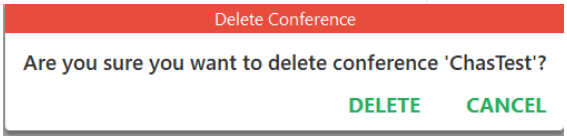


Start – Starts the conference call by accessing MXconference, enable Guest users to join, start MXmeeting if configured.

Edit – It is recommended to be in Expanded mode when choosing the Edit option.

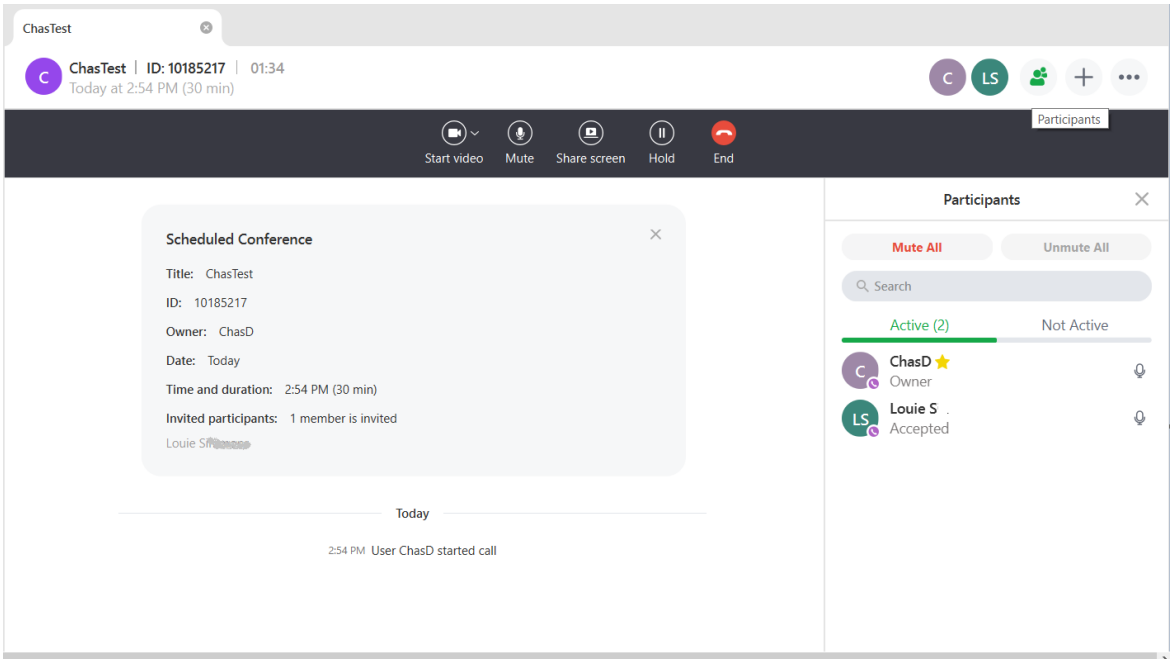


Change owner – Allows designation of another participant to be the owner of the conference. Check the desired participant from the list and click Save.
Delete – Remove the conference from the list and the MX system. MX will prompt for confirmation.



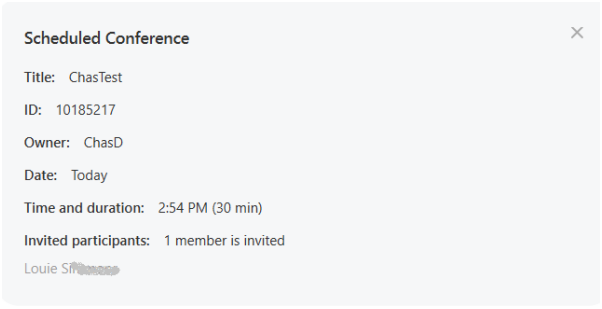
6.1.5 Host options

By displaying the Participants in a conference, the host has access to muting/unmuting all or individual participants. The host can also disconnect a user
Active indicates the quantity and individual user who is active in the conference.
Not Active indicates invited users who have not joined the active conference.



6.1.6 Conference description

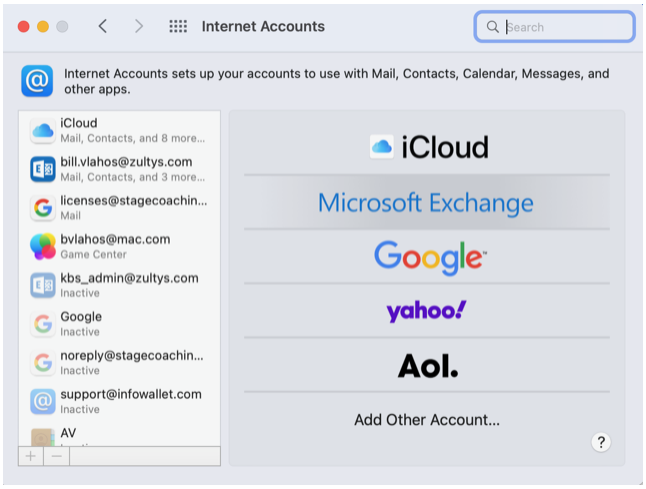
When a conference is started, a description form will be displayed that provides conference information



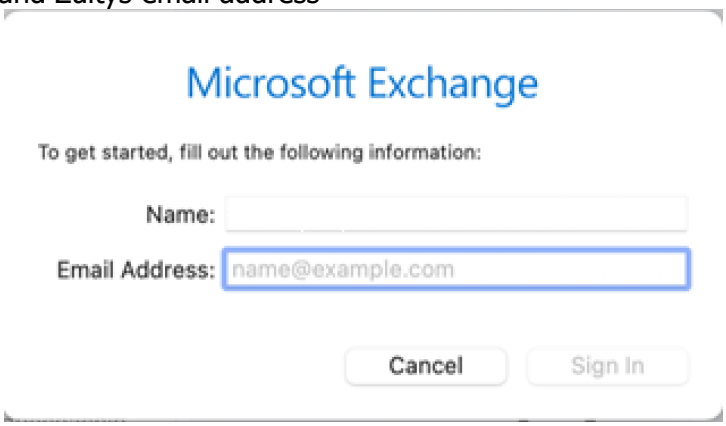
You can remove the form by clicking the X.

6.1.7 MAC Calendar Integration

1. Open **System Settings**
2. Click on **Internet Accounts**
3. Click on **Microsoft Exchange**

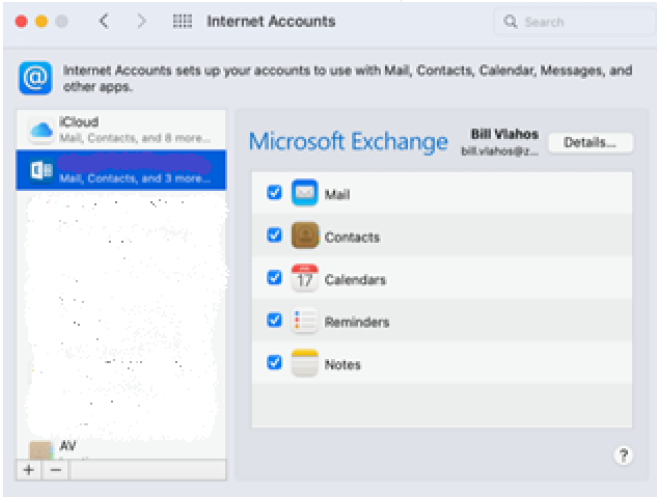


1. Enter the name and Zultys email address



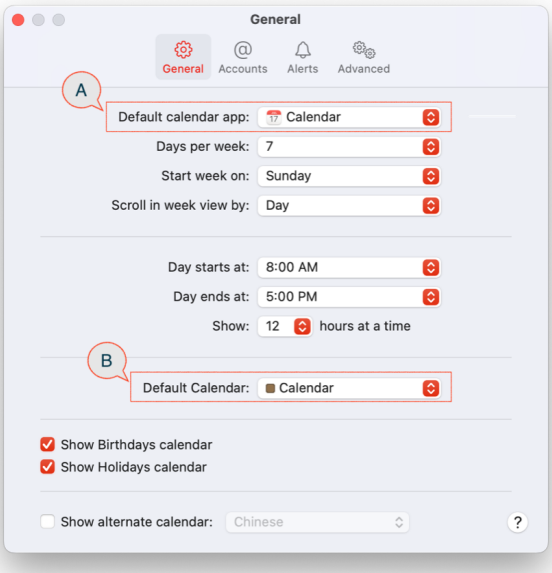
1.

2. Check the boxes for **Mail** and **Calendars**. The others are optional.

1. 

3. Open the **Macintosh Calendar application**
4. Open **Settings…**
5. Leave the **Default calendar app** (A): as **Calendar** (this is the built-in calendar app on the Mac.)

7. Set the **Default Calendar (B)**: to your Exchange **Calendar** from the popup menu.



8.

Once this is done, the **Mail** and **Calendar** apps will have the **Outlook/Exchange** account info. The user can choose to use them or just ignore them and use **Outlook**.

6.1.8 Adding scheduled conferences to Mac calendar

To add scheduled conferences to the Mac calendar perform the following configuration steps. These instructions assume the integration is with the Microsoft Exchange calendar system. The Zultys integration can also work with iCloud, Google G-Suite, etc.

- Open **System Preferences**
- Click on **Internet Accounts**
- Click on **Microsoft Exchange (or select Google, iCloud, etc.)**

    1. Enter your name and email address

- Open the **Macintosh Calendar application**
- Open **Preferences…**

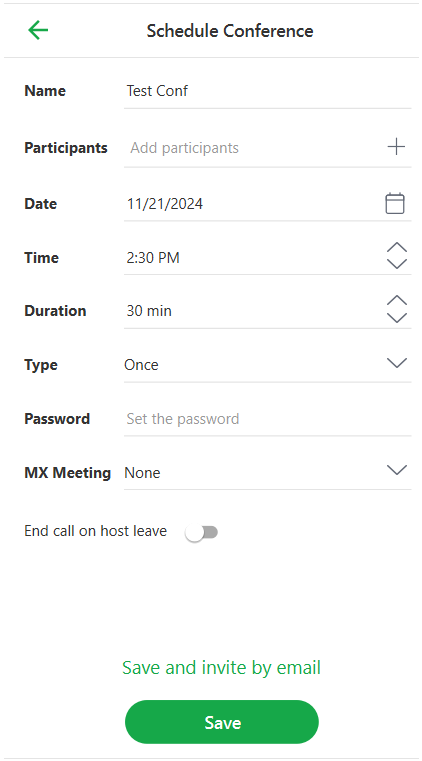
Leave the **Default calendar app** (A): as **Calendar** (this is the built-in calendar app on the Mac.)

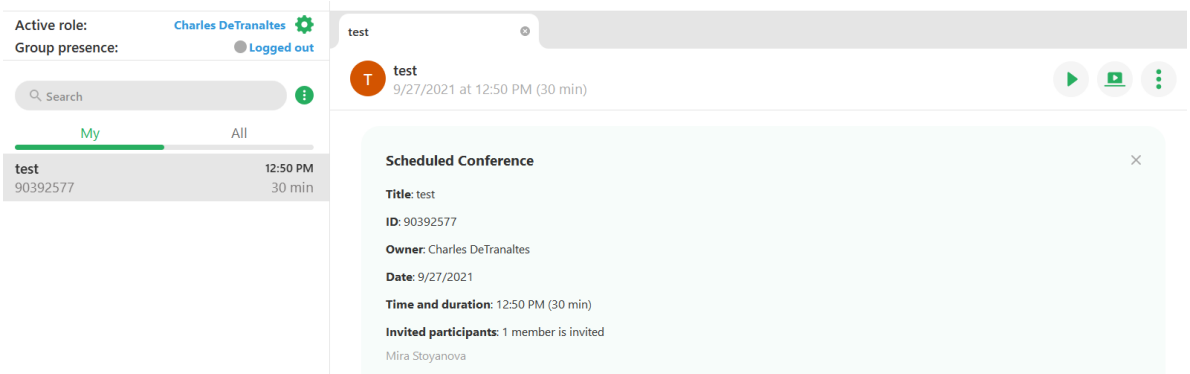
- Set the **Default Calendar (B)**: to the target **Calendar** from the popup menu. The default value is probably the iCloud calendar. Match the calendar name in the calendar application (Microsoft Exchange, iCloud, Google, etc.)

6.2 ZAC

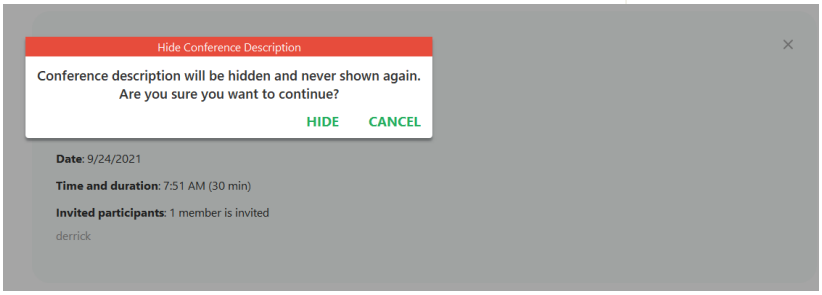
When the user schedules a conference in ZAC, click the **Save** button - not the **Save and Invite** link. The **Save and Invite** does something different which isn't as useful on the Mac like it is on Windows. It will add a vCAL file.

The scheduled conference will show up on the Outlook calendar automatically in a few seconds. The user will then open the calendar event itself and invite attendees as normal.





The screen will remain until the X icon is selected.


Hide Conference Description
Conference description will be hidden and never shown again.
Are you sure you want to continue?
HIDE
CANCEL
Date: 9/24/2021
Time and duration: 7:51 AM (30 min)
Invited participants: 1 member is invited
derrick

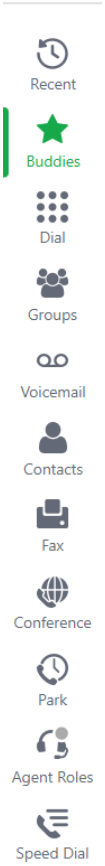
7 Notifications

The notification area indicates new/current/missed activity in the specific areas of the program. This provides an indication to the user that that area has had activity.
If a specific area has activity, a notification will be presented indicating the total amount of activity for that area. Clicking on that area will reset the activity notification.

Note: Park notifications were removed in 18.0.4.

Activity notifications apply to the following areas in the program:

- Recents
- Dial
- Voicemail
- Groups
- Fax
- Conference



Notifications are displayed by the filter selected within an area. For example, in Recents you can filter by All, Calls, Messages. If you have the Messages filter selected, the notification screen will display notifications for messages. If the Calls filter is selected, notification will display notifications for calls only.
This functionality applies to all areas where filters are provided.

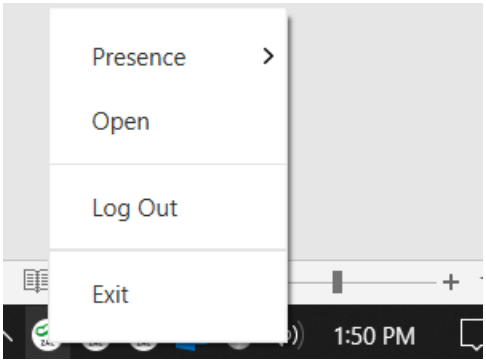
Notifications may also appear when in expanded mode. If there is activity, the tab associated with that activity will display a notification if it is not in focus at the time of the notification event.

7.1 System Tray and Taskbar Options:

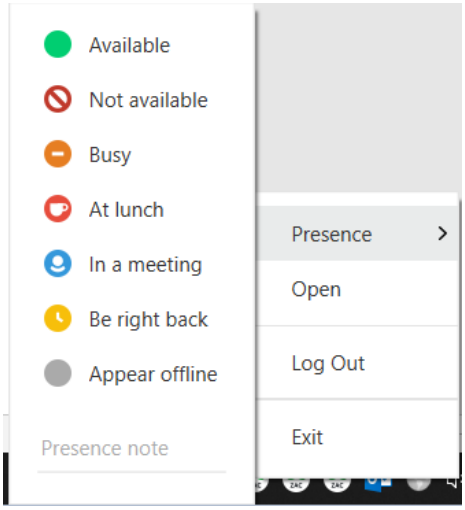
A user may access certain features of the program directly from the System Tray or taskbar. Features that can be accessed from the taskbar are:

- Presence state**(System Tray only)**
- Presence note**(System Tray only)**
- Log out
- Open
- Exit

Right click on the ZAC icon in the system tray:

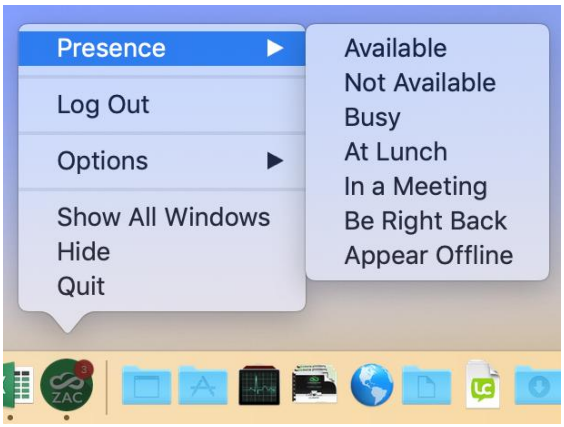


Click Presence and select the desired presence. You may also add a presence note.



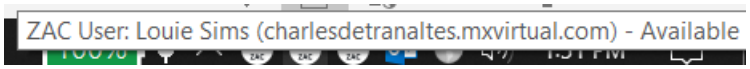
The icon will change to reflect the current presence status (on the phone shown)

Windows



Macintosh

You may mouse over the icon to display user name, MX system, and presence state



8 Guest Users – External Collaboration

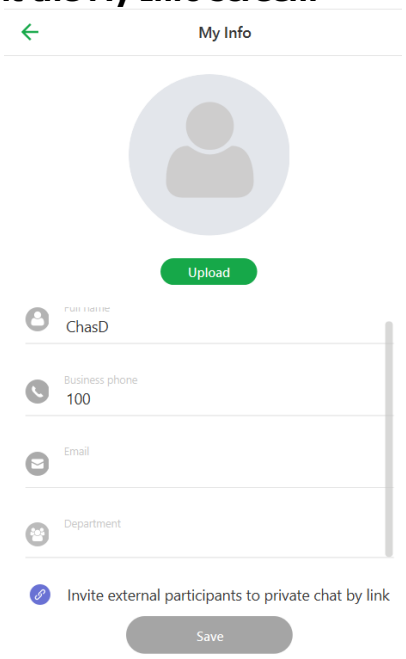
The Guest user feature allows MX users and MX group hosts to send a link to an external party so they may collaborate with MX users/groups. Guest users may chat, participate in audio/video conferences, file share and screen share with group members. Guests may also call hosts directly and vice versa.

Note: The Guest user feature requires configuration on the MX system. Users will not have access to the invite by external link feature if the MX is not properly configured. Check with your Administrator.

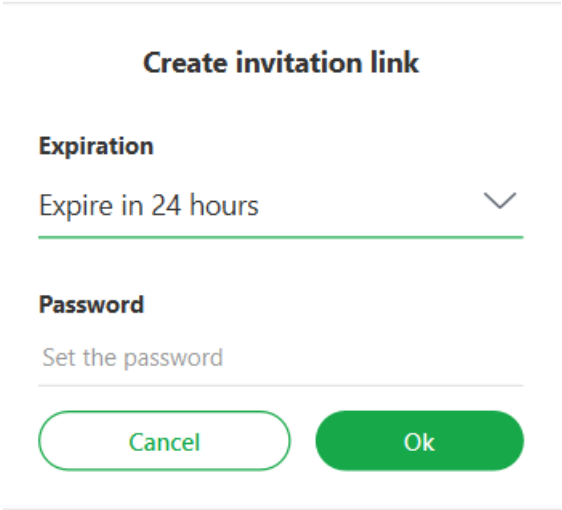
8.1 Guest users (invite external party)

You may invite an external party to a user Chat session. To do this:

- **Click your name to present the My Info screen:**



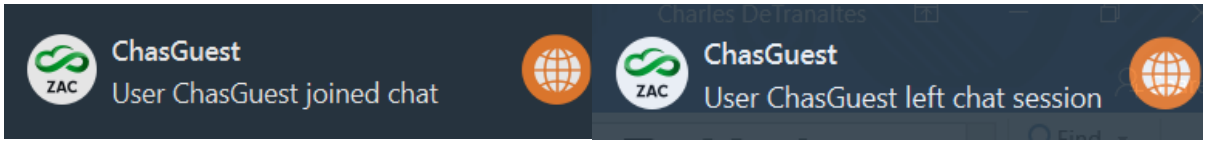
- Click Invite external participants to private chat by link.to chat by link option.



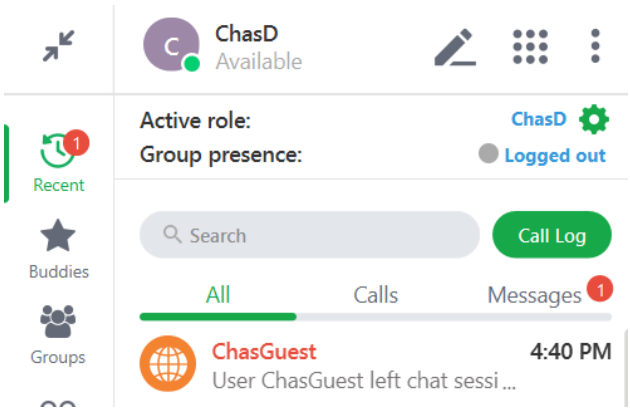
Enter an expiration time (default=24 hours) and password (optional).
Click OK.

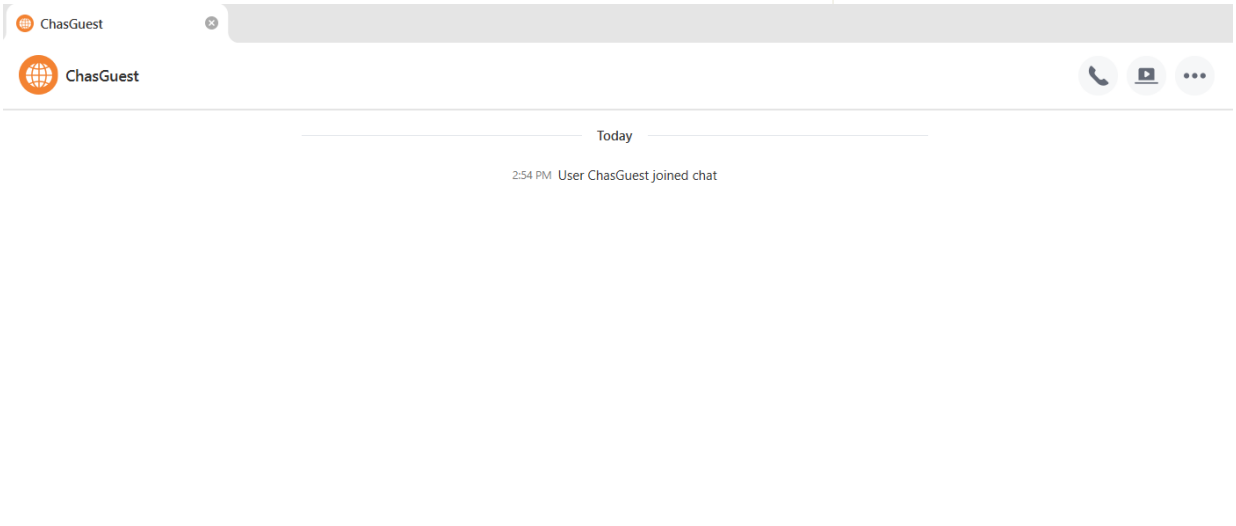
The link will be copied to the clipboard. Send the link to the external participant (email/SMS, etc.).

When they enter (and leave) a session you will receive a popup notification and chat area notification.



You will also see notifications/events in the Recent area.

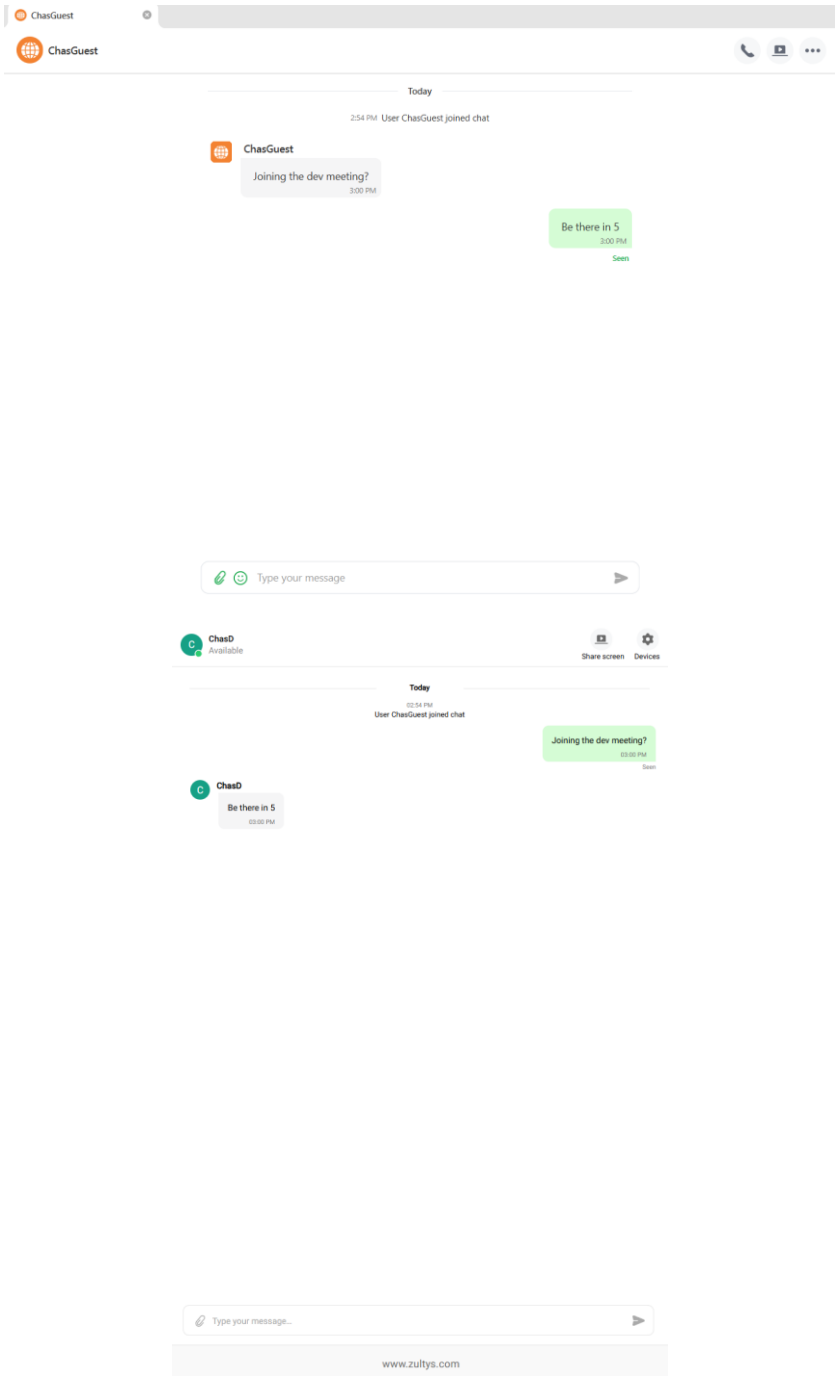



ChasGuest
ChasGuest
Today
2:54 PM User ChasGuest joined chat
Type your message

Chat area

Guest user view

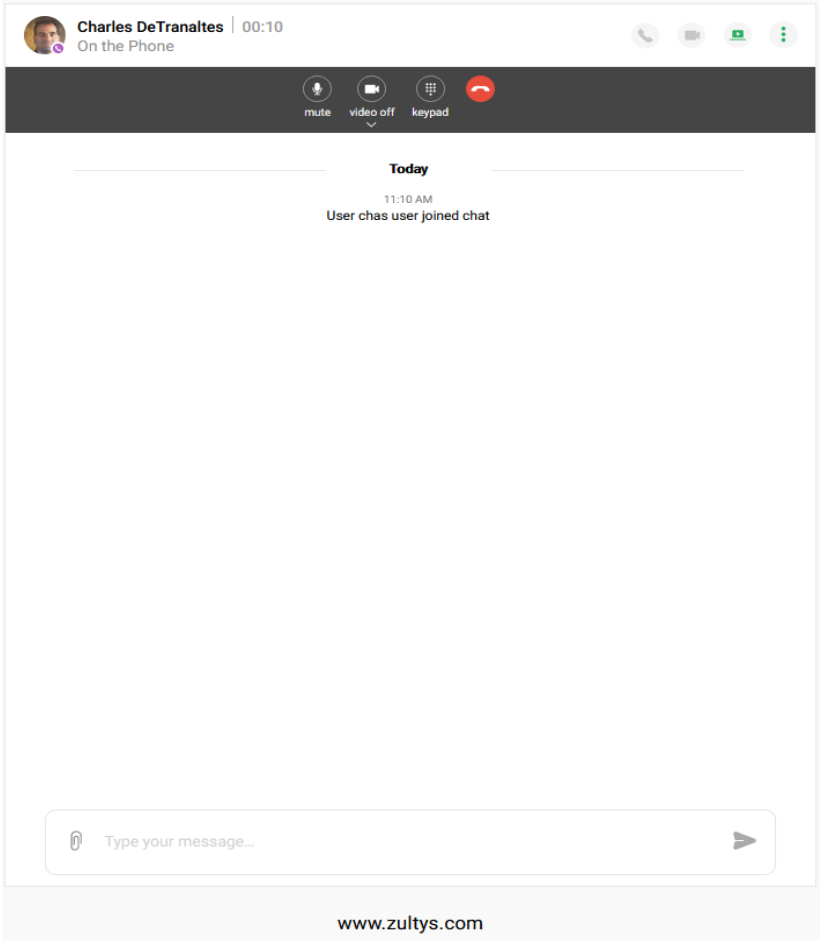
You may converse in the chat area with the external user:

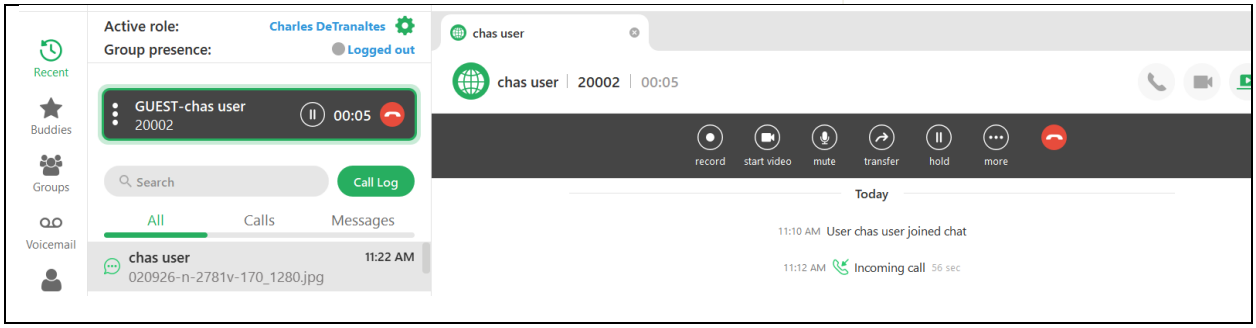


Guest

8.1.1 Guest calling host

The guest may click the handset icon to place a call to the MX user.

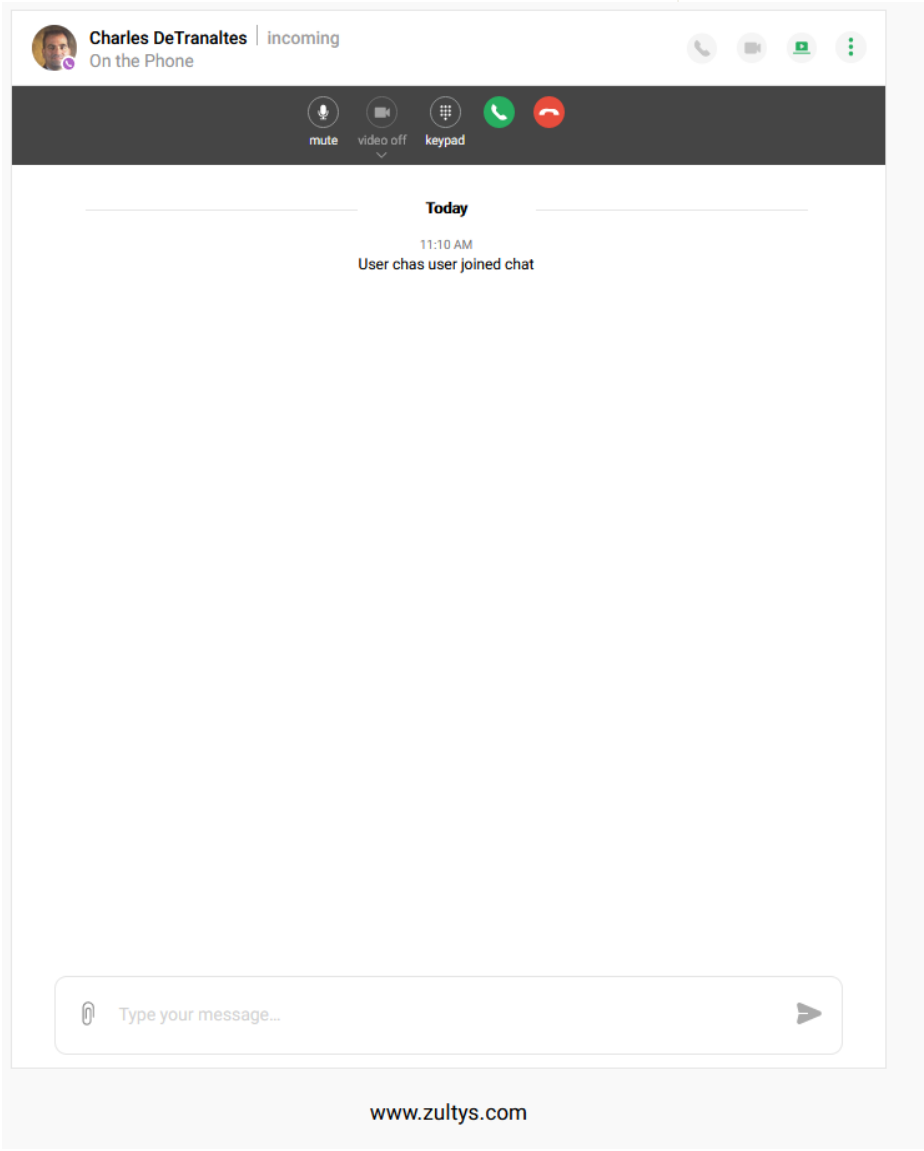


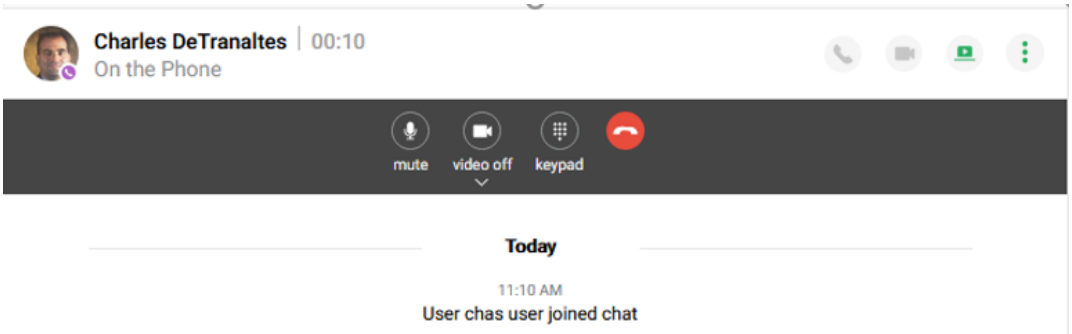


ZAC view of guest call in progress

8.1.2 Host calling Guest

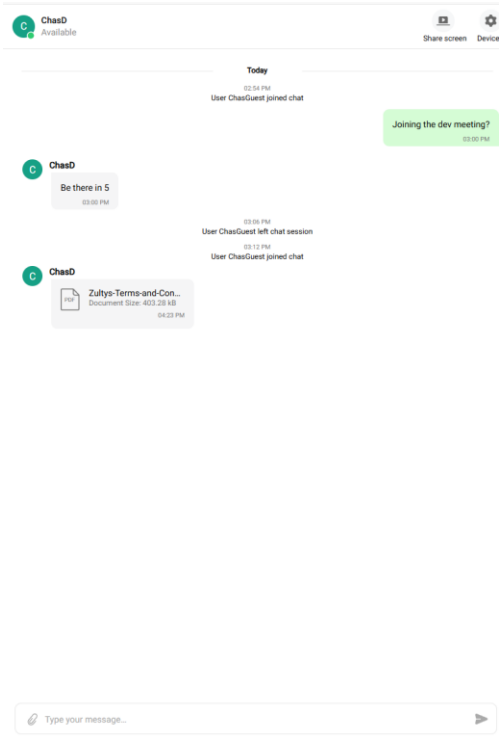
The MX user may click the handset icon or dial the extension number assigned to the guest to place a call to the guest.


Charles DeTranaltes | incoming
On the Phone
mute
video off
keypad
Today
11:10 AM
User chas user joined chat
Type your message...
www.zultys.com


Charles DeTranaltes | 00:10
On the Phone
mute
video off
keypad
Today
11:10 AM
User chas user joined chat

8.1.3 Guest receiving file from MX user

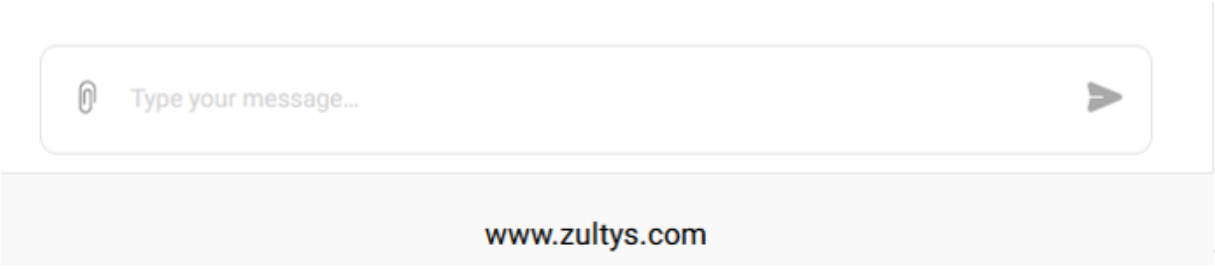
Files may be exchanged between MX users and guests.



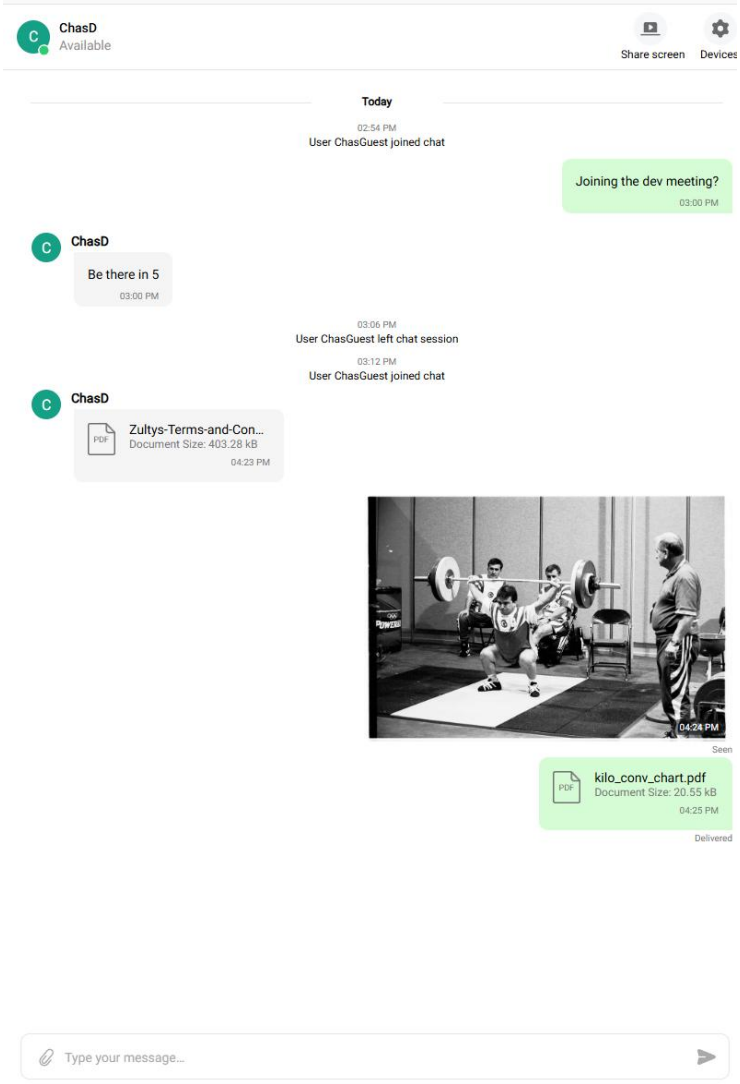
8.1.4 Guest sending a file to the MX user

The guest can send files and images to the MX user.

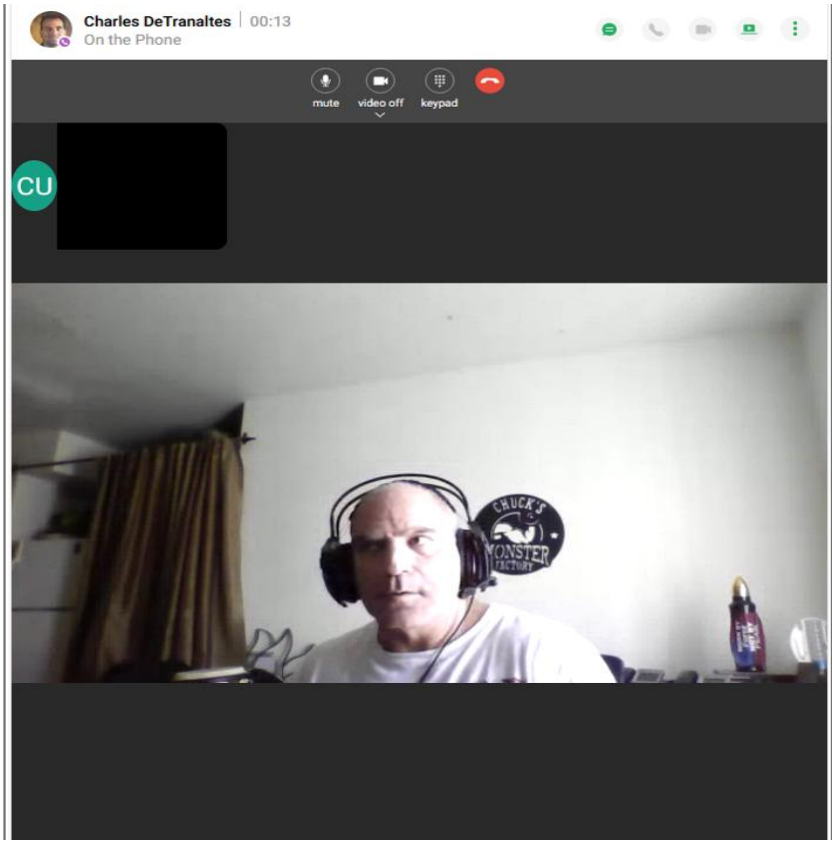
- Click the paperclip icon in the chat area.



- Navigate to the desired file and click Open.

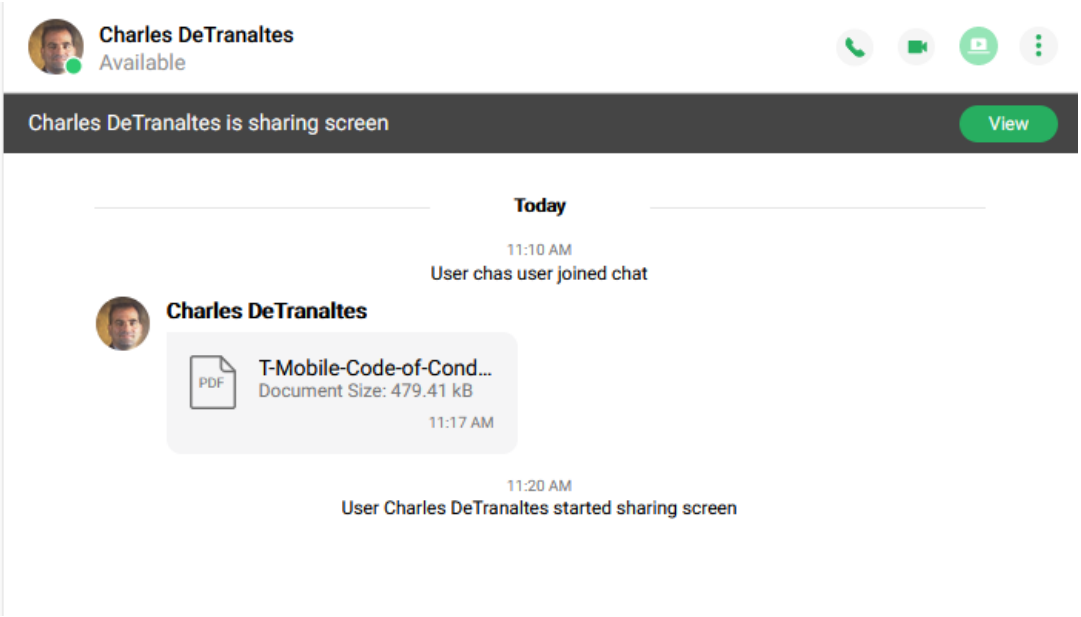

ChasD
Available
Share screen
Devices
Today
02:54 PM
User ChasGuest joined chat
Joining the dev meeting?
03:00 PM
ChasD
Be there in 5
03:00 PM
03:06 PM
User ChasGuest left chat session
03:12 PM
User ChasGuest joined chat
ChasD
Zultys-Terms-and-Con...
Document Size: 403.28 kB
04:23 PM
04:24 PM
Seen
kilo_conv_chart.pdf
Document Size: 20.55 kB
04:25 PM
Delivered
Type your message...

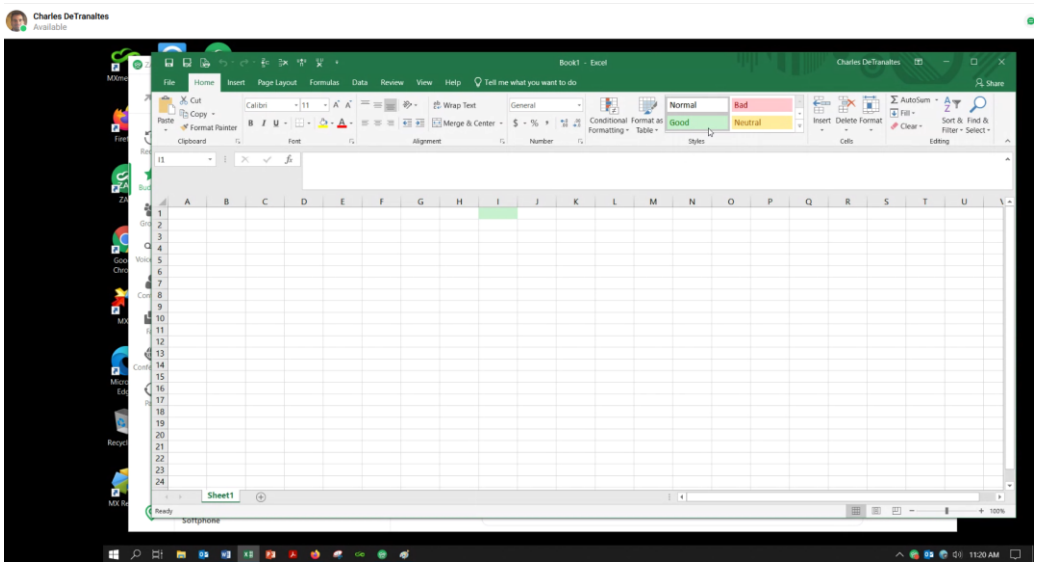
8.1.5 Guest video



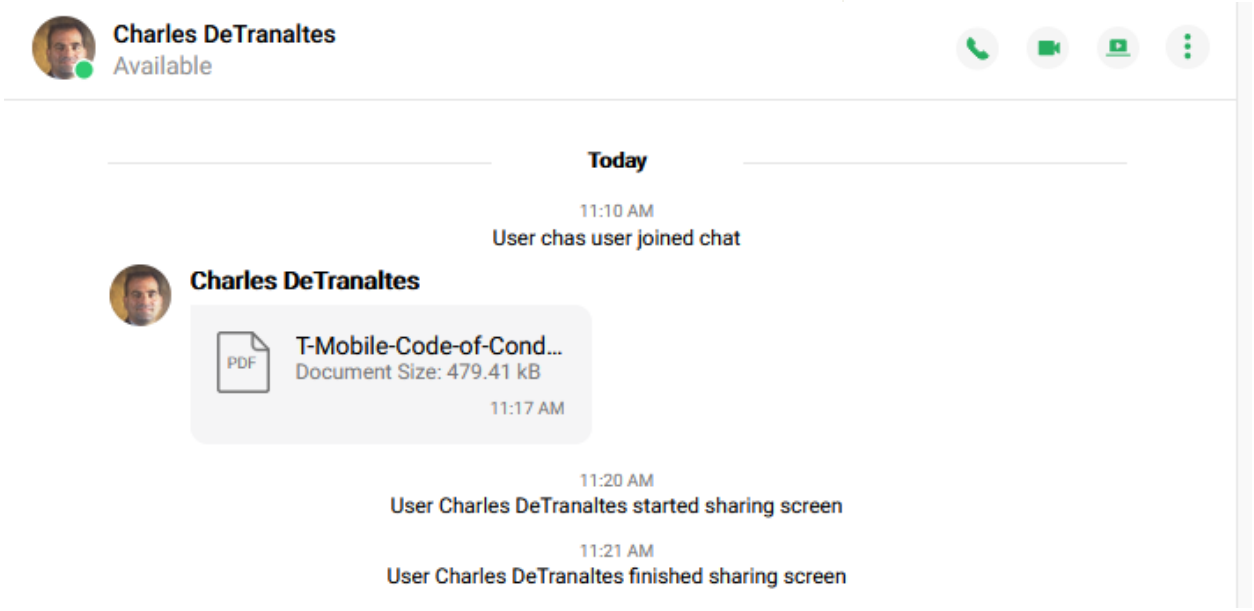
8.1.6 MX user screen share with guest

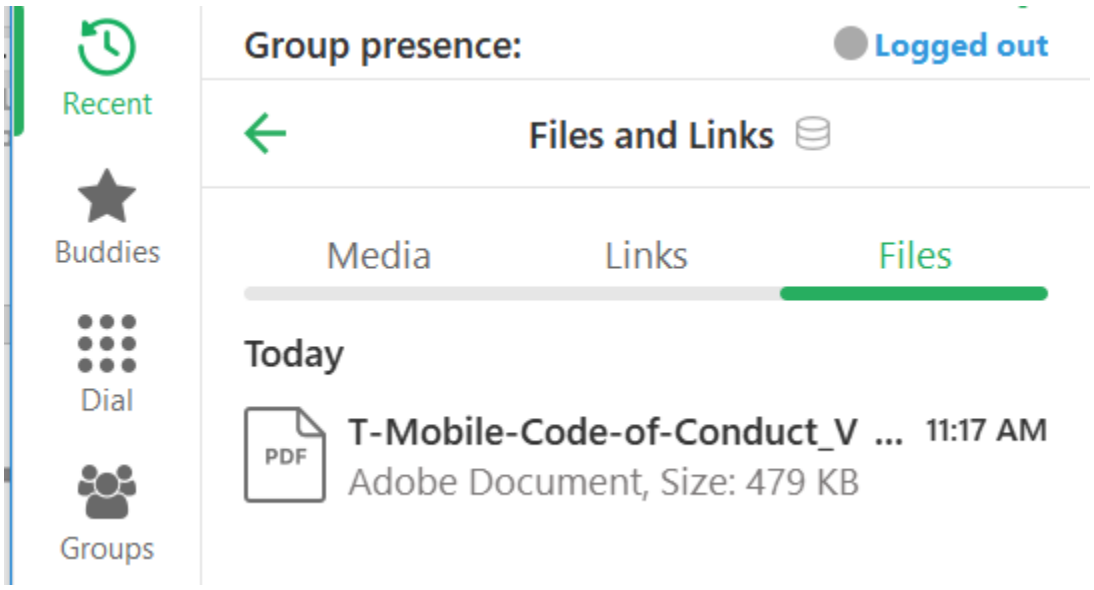
Click the View button to start viewing the MX user screen that has been shared.



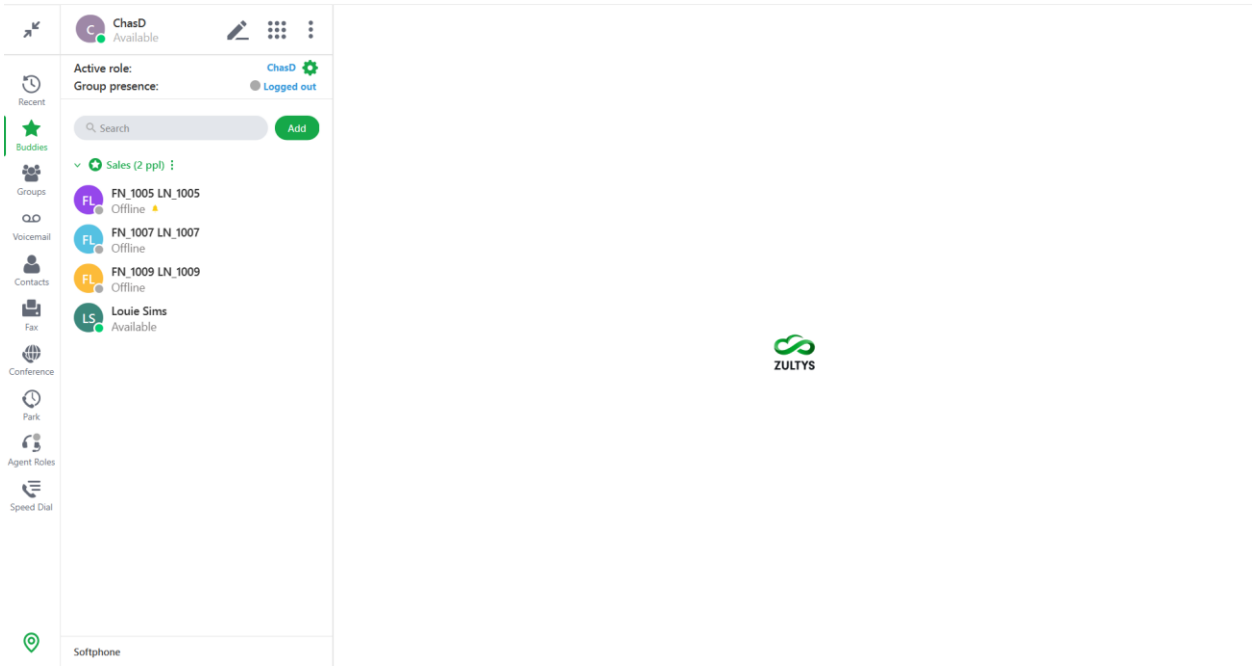


Click the stop viewing screenshare icon to stop the sharing.

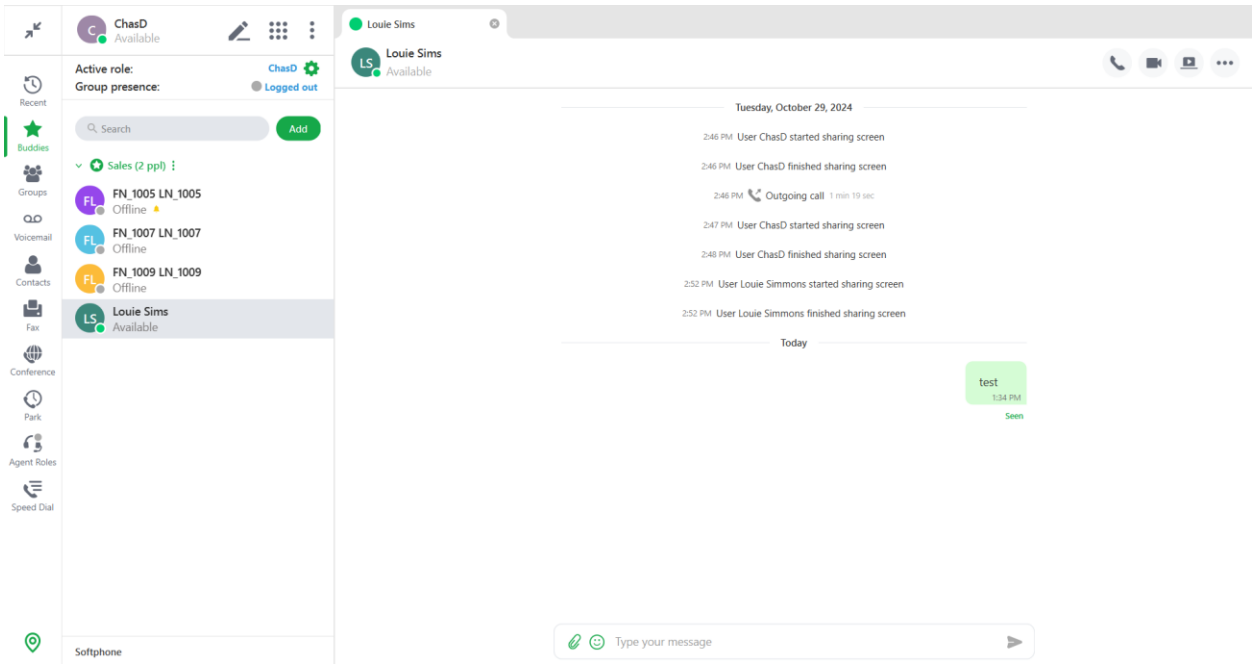

Charles DeTranaltes
Available
Today
11:10 AM
User chas user joined chat
Charles DeTranaltes
PDF
T-Mobile-Code-of-Cond...
Document Size: 479.41 kB
11:17 AM
11:20 AM
User Charles DeTranaltes started sharing screen
11:21 AM
User Charles DeTranaltes finished sharing screen


Recent
Buddies
Dial
Groups
Group presence:
Logged out
Files and Links
Media
Links
Files
Today
PDF
T-Mobile-Code-of-Conduct_V ...
11:17 AM
Adobe Document, Size: 479 KB

9 Full Screen Mode



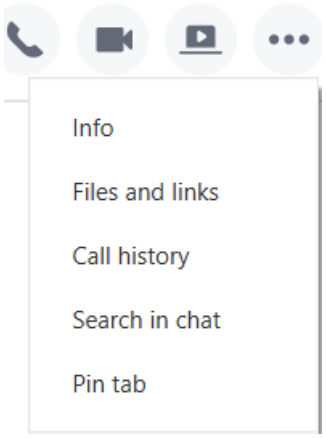
When you click on a buddy/contact, the activity screen for that contact will display in a tab in the work area.



Clicking another contact/buddy will display the activity screen for the selected contact. The previous contact/buddy is replaced.

You may pin the activity screen so that it remains on the screen.

To do this, click the pin

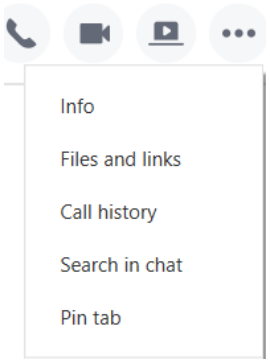


If you close the activity screen after pinning it, you will need to re-pin the screen.

The pinned tab will remain on the screen and you may select the tab by clicking on it.

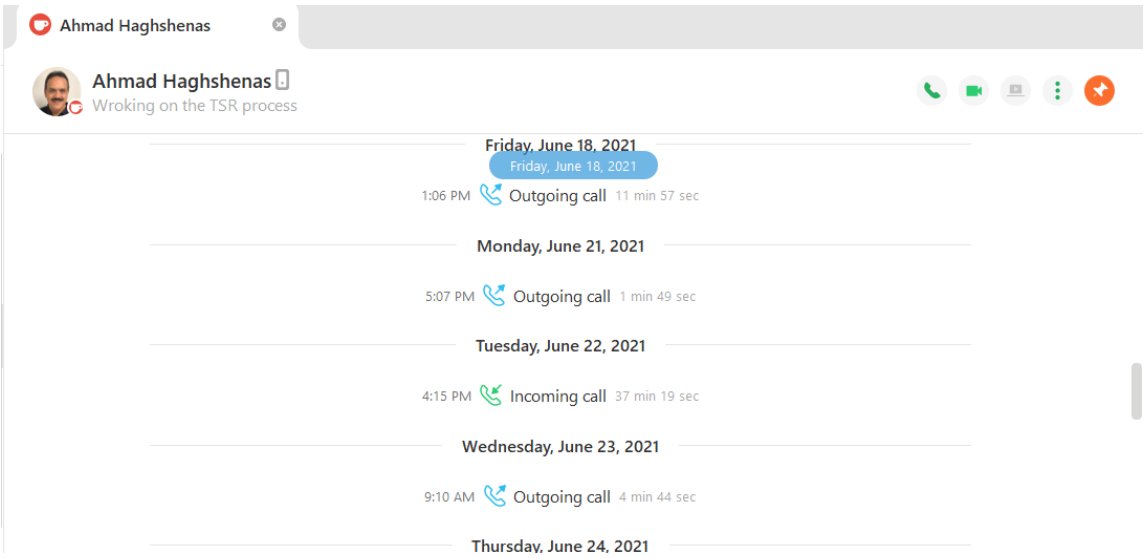
When the activity tab is open, you have the following actions available:

- Call the contact
- Start video
- Start screen sharing
- More



There may be other options based on what information the contact has made available.

The recent activity screen will expand and display the recent history for the selected contact. This will include calls as well as instant message activity.



You may close the recent activity screen by clicking the X next to the contact name in the tab area.

10 Agent Roles/Call Group Operation

In addition to logging into ZAC through your user role, you can also log into any of the ACD, ICC or Operator Groups to which you belong. ZAC opens a role partition for each group to which you are a member of, and are logged into. ZAC provides features for ACD, ICC agents and Operators that based on the call group functionality, and may differ from those features that are available to users. Call group operation operates in expanded mode.

10.1 Presence for Operators

The following conditions may trigger transitions between operator presence states based on the user's defined preferences:

- **Available to On the Phone** triggers when an ACD agent or operator initiates or accepts a call. This rule cannot be removed or changed.
- **On the Phone to Available** triggers when an operator terminates a call.
- **Available to Not Available** triggers when the user changes to a state specified by the ACD and Operator User Preferences window.

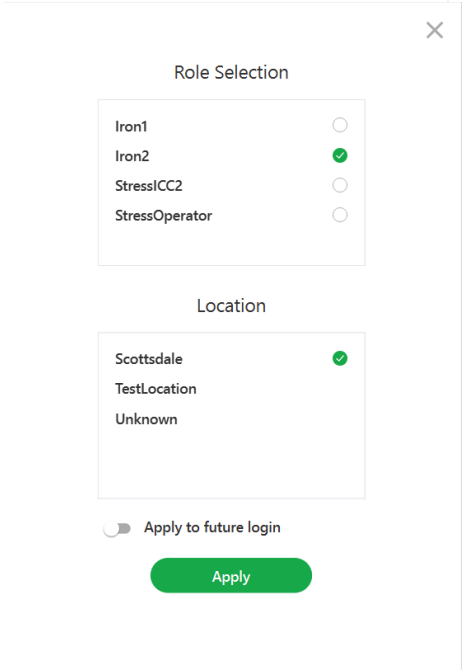
10.2 Presence for ACD Agents

The following conditions may trigger transitions between Agent presence states based on the user's defined preferences:

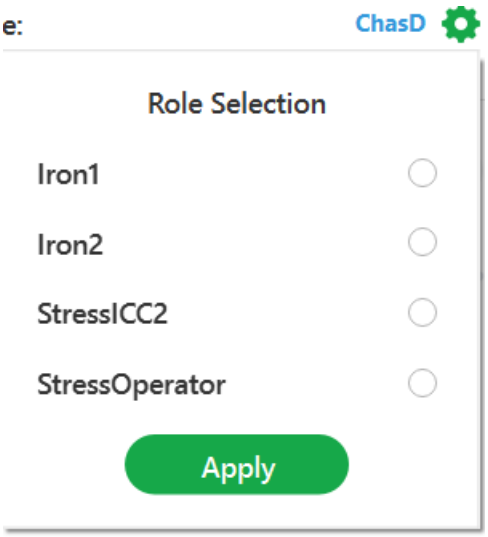
- **Available to Active** triggers when an ACD agent initiates or accepts a call. This rule cannot be removed or changed.
- **Active to Wrap up** triggers when an agent terminates a call.
- **Wrap up to Available** triggers after remaining in the wrap up state for a period specified by the ACD and Operator User Preferences window.
- **Available to Not Available** triggers when the user changes to a state specified by the ACD and Operator User Preferences window.

You may select a Role(s) when logging into ZAC.

Click the "Apply to future login" to have role selection performed automatically at each login.



You may also select a role after you are already logged in in the Agent Active Role/Role Selection area.

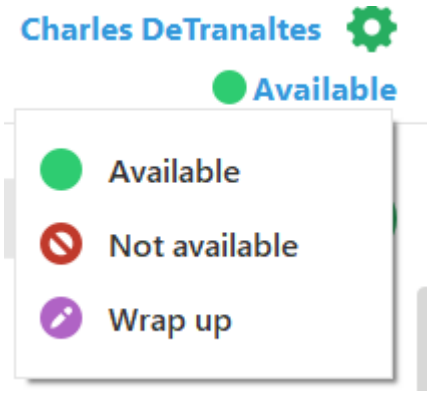


You may also select an Active role prior to placing an outbound group call.

Click on the displayed Active Role
Check the desired role to make it active

Place the outbound call.

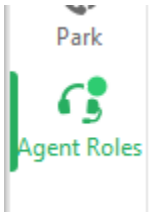
You can change your Group presence by selecting the desired presence state from the list.

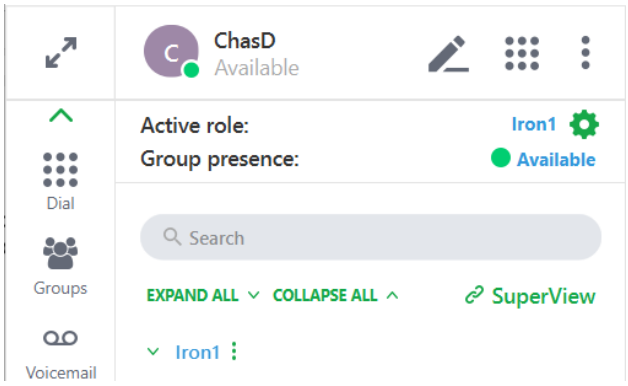


The presence state will change after selecting a presence.

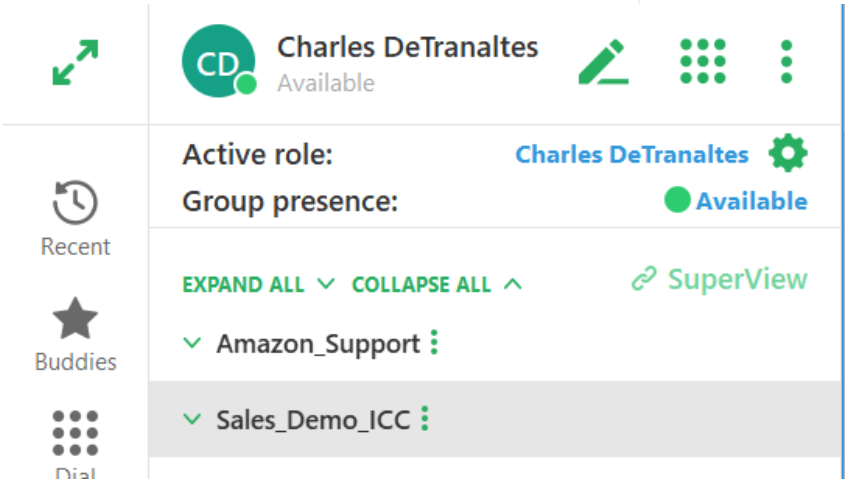
10.2.1 Agent Roles

You may display the presence state of other Agents in the Call group. After selecting all desired Roles, each group you selected for a Role will display. You may expand or collapse each group to view the agent status of each by selecting the Agent Roles area:





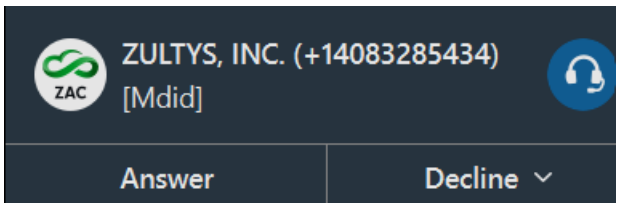
You may use Expand or Collapse all to view all agents for all groups.



Please note blue stars indicate that member is a supervisor of that ICC call group. The star will indicate dark blue when the supervisor is logged in and light blue when the supervisor is logged out.

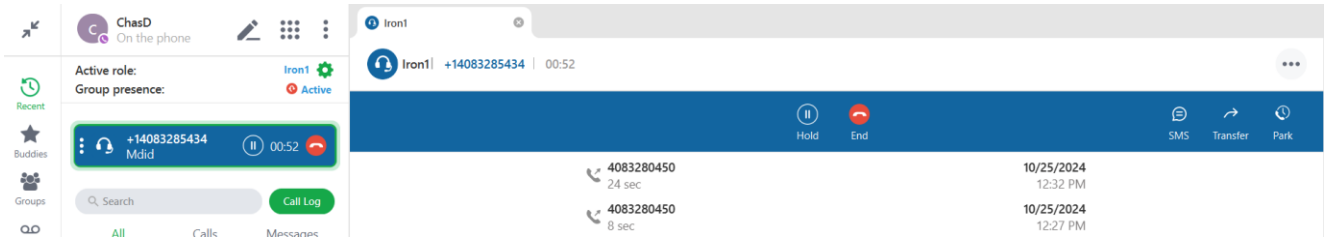
- **Incoming group call notification:**

Incomings calls to a group agent will contain the incoming callerID and the call group name that was called.



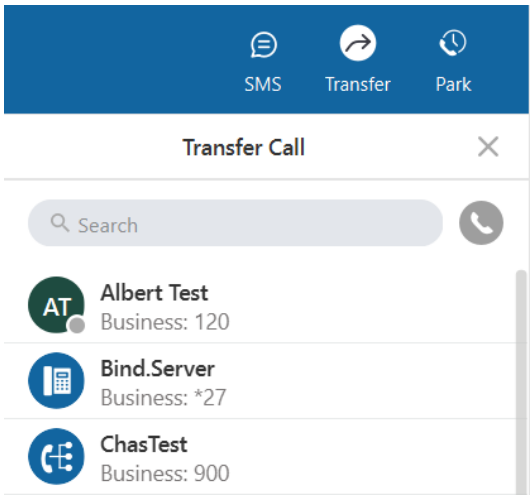
- **Call group session**

When an agent answers a group call, the call session will display.



- **Transfer call**

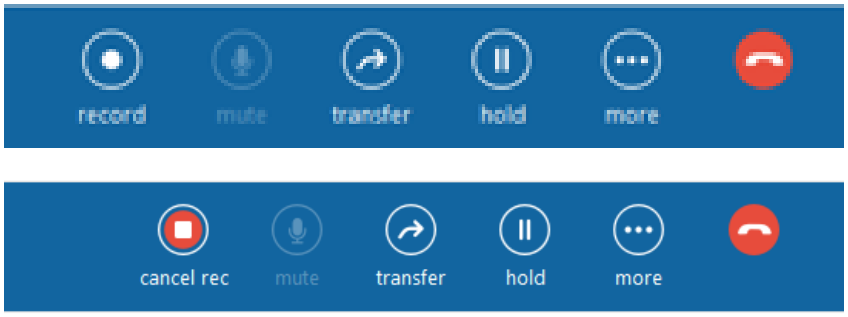
To transfer the call to another user click the transfer icon in the call session.



Select the desired contact and click the call icon.

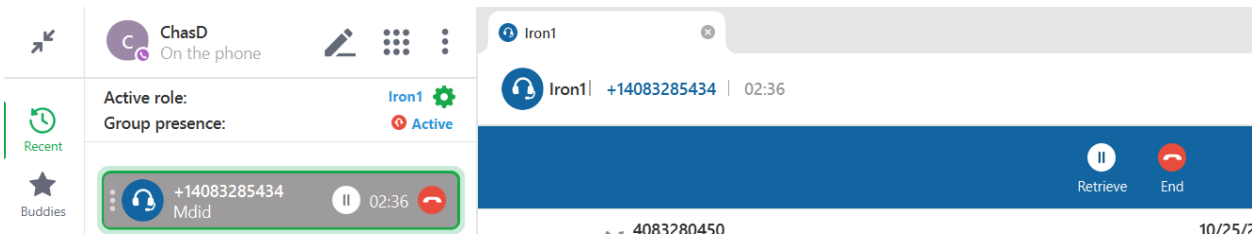
- **Record a call**

If call recording is configured, you will have capability to record the call. During the recording, you will also have capability to pause/resume the recording. No call recording audio is present during this pause period.



- **Hold**

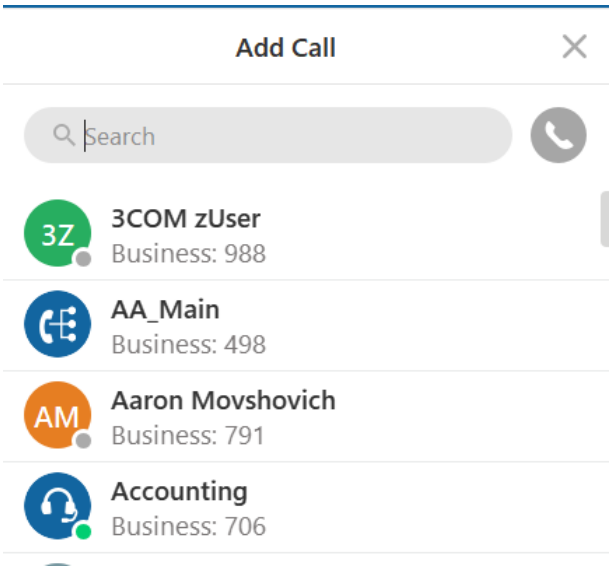
This will placed the call on hold. Only the agent may retrieve the call from hold.



Click retrieve to resume the call.

- **Add call**

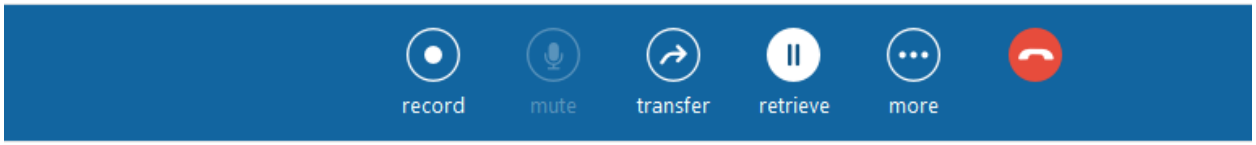
Select the desired contact to add.



- **Retrieve**

In case a transfer or conference does not complete, you may retrieve the original call from hold.

Click the retrieve icon.



- **Park**

You may place the group call in system park. The call will be placed in a hold state and is available for all MX users to retrieve.

Select Park from the More menu.

MX users receive a notification that a call is in Park.

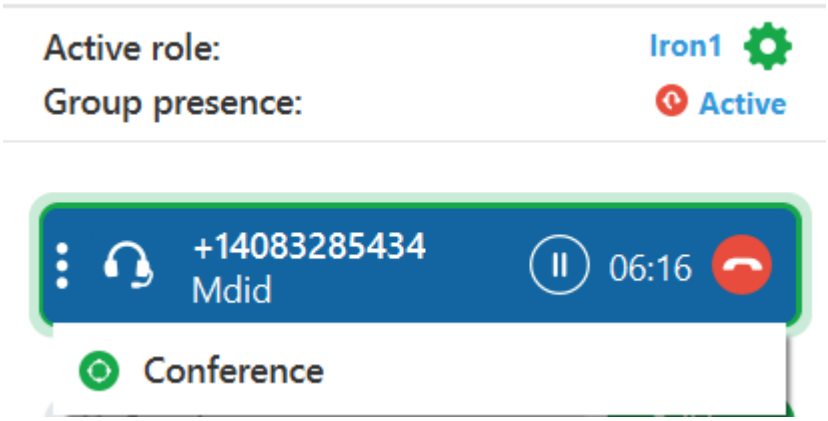
The parked call will display the following

Mouse over and click Pick up to resume the call.

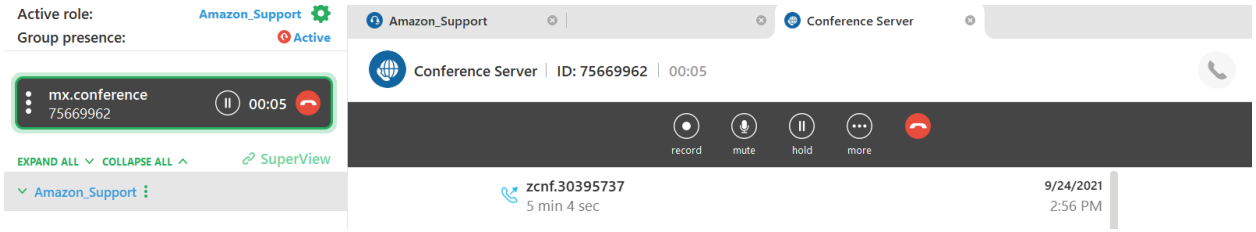
- **Conference**

You may create an ad hoc conference call to include other MX user in the conference call.

Click the options icon in the left call session and select Conference.

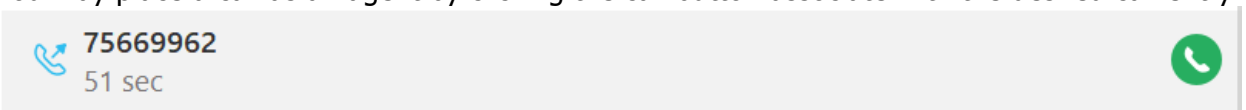


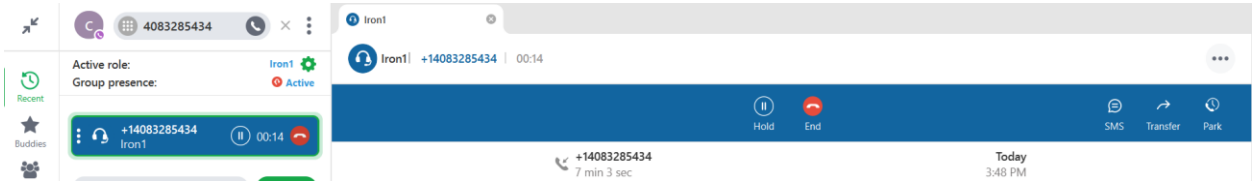
MXconference will begin between you and the caller. You may add additional parties to the conference after it has started.



- **Placing outbound in group role**

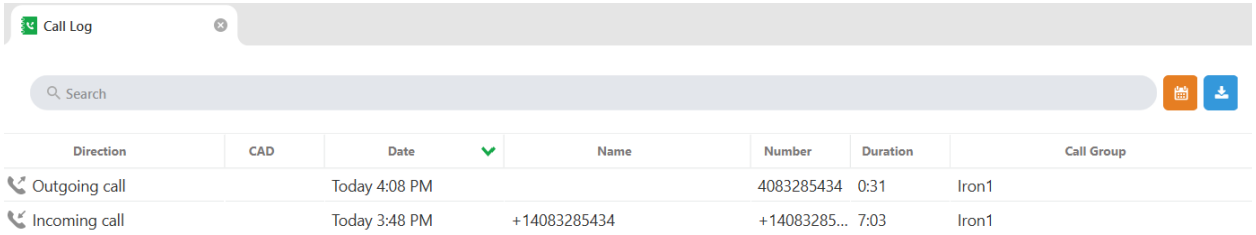
You may place a call as an agent by clicking the call button associate with the desired call entry.





- **Call log**

A group call log of all calls the group placed/received are included in the log.

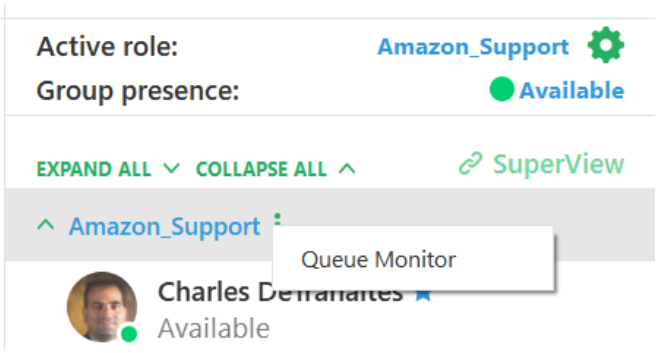


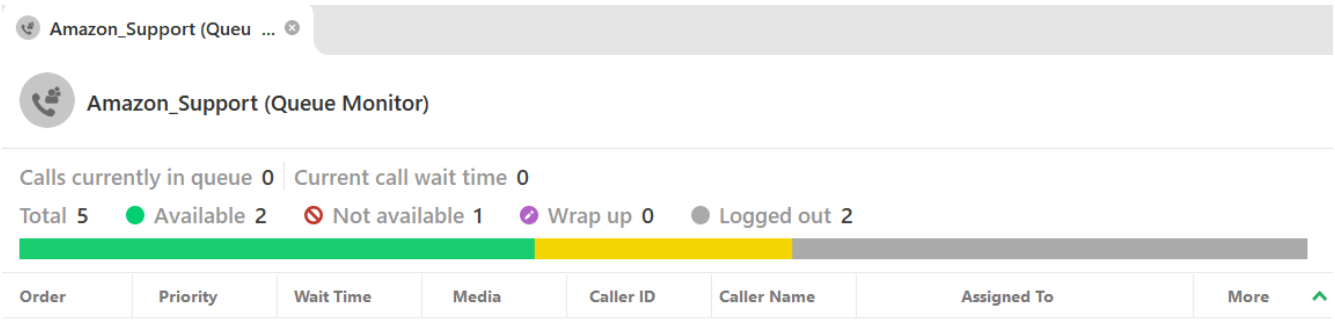
10.2.2ZAC 8 Queue Monitor

This screen is available to agents of a hunt, ACD, Operator or ICC call group type. This call monitor allows a group member to view information about the calls that are in queue for the group.

While in the Agent Role screen, click the options icon next to the call group name.

Select the Queue Monitor item.





The screen id defined from top to bottom as:

- Name of the call group
- Number of calls currently in queue and the current call wait time
- The fields in the Queue monitor are defined as:

Priority – The priority associated with the queued call.

Wait Time – The amount of time the caller has been waiting in the queue.

Media – The specific media type of that call in queue, call, automatic callback, webchat

CallerID – The callerID associated with the inbound caller.

Caller name – The caller name associated with the inbound caller.

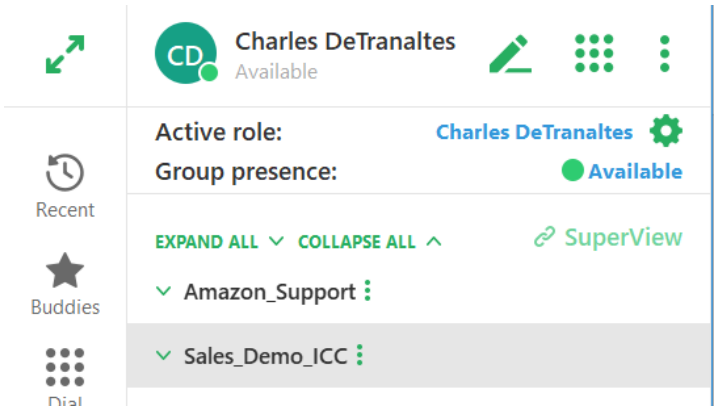
Assigned to – The agent that will handle the call.

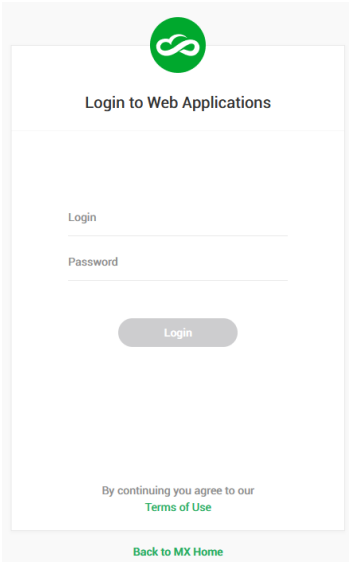
More – Presents CAD fields.

10.2.3 Supervisor functions

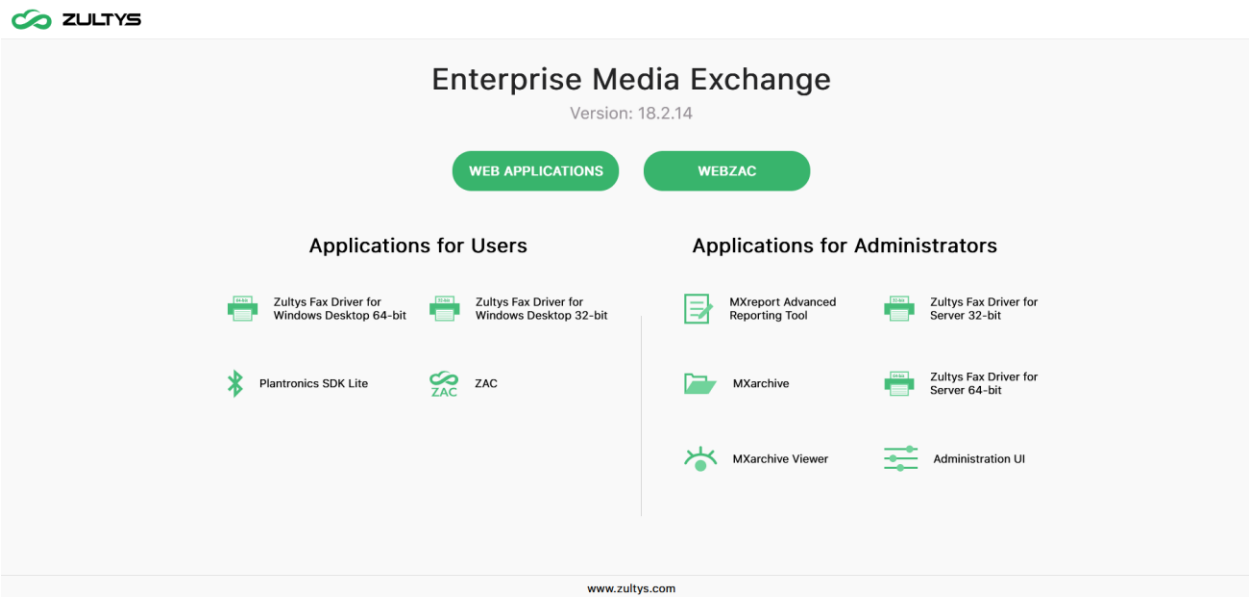
A Supervisor of a an ICC group may access the Web Based SuperView program directly from ZAC.

Click the SuperView icon:

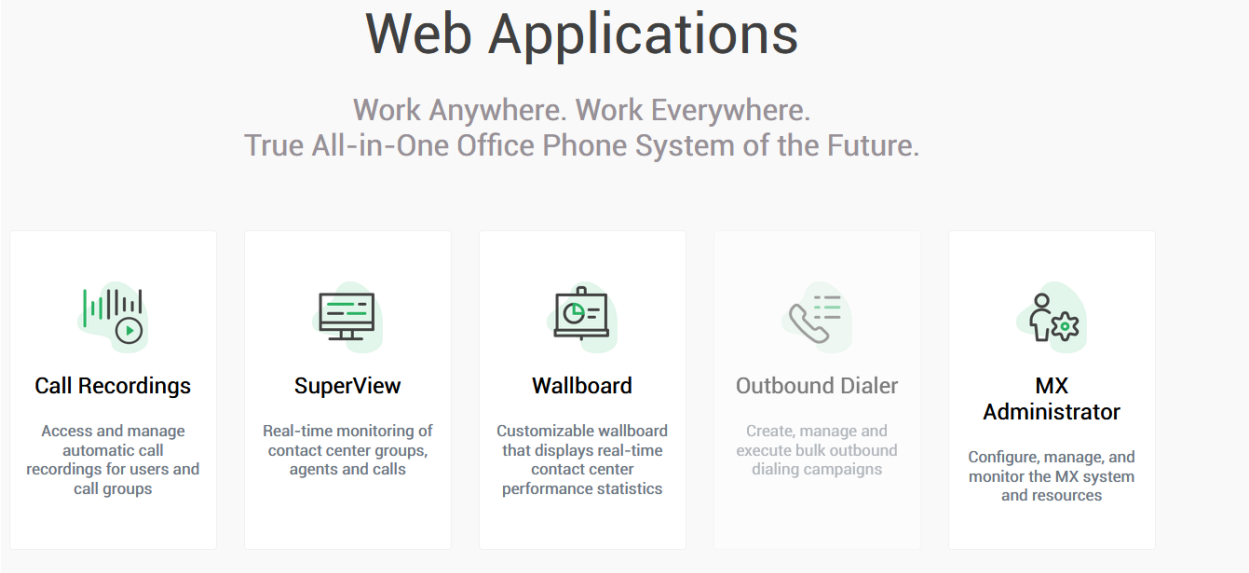




Enter your username and password at the web application page and click login:

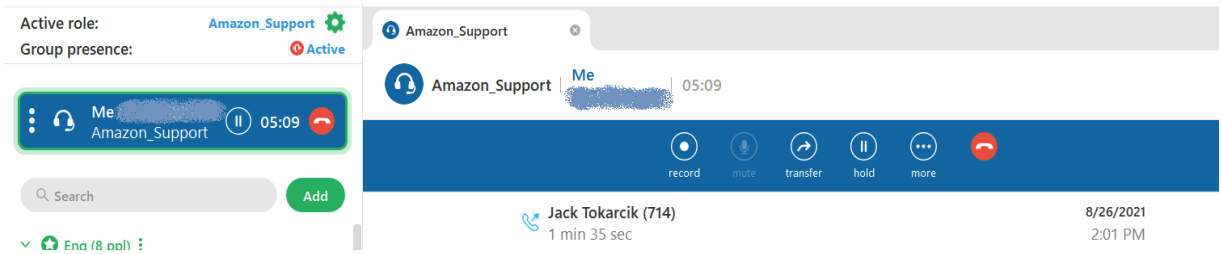


Click Web Applications.



Click the SuperView icon

Incoming group calls are identified in the call session area next to the callerID.



A history of the group calls is presented below the call session area.

11 SMS Service

11.1 Description

Zultys SMS option allows customers to initiate and receive SMS messages using ZAC The ZAC interfaces has been designed to streamline and make sending SMS messages easier and intuitive.

11.1.1 Requirements

- **ZAC Version** – Must be 9.0.36 (or greater) 9.2.4 (or greater) is required for all the group SMS features described within.
- **MX Version** – Must be 18.0.4 (or greater) 18.2.14 (or greater) is required for all group SMS features described within.

- **Voice DID** – User must have a SMS enabled voice DID assigned if user DID will be the number to be sent to recipients.
  Shared number – Shared number configured at a system, user profile, or call group level can be used instead of user DID. In this configuration, the shared number is sent to recipients.
- The DID number format assigned in MX Administrator **MUST BE** 11 digits. The 11 digits must be formatted as 1+10 digits. For example, a voice DID number of 602-555-1212 would be configured as 16025551212 in MX Administrator.
- If the user cell phone number is configured in the user area, users will not receive a text if they attempt to text themselves.

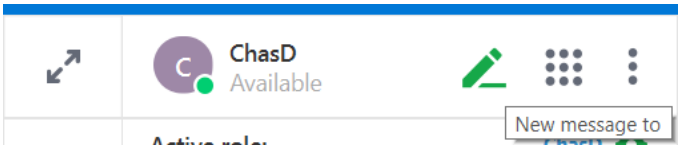
11.1.2 Overview Process

- SMS is an optional service that Zultys Cloud Service customers may order using part number 91-19301-V. This part number includes 1000 inbound/outbound SMS messages per month.
- All backend configuration is performed by Zultys personnel.
- Zultys Cloud Service customers who manage their customers system must enter the DID numbers or shared numbers as described above (11 digit entry) In MX Administrator. ***Backend configuration work in this scenario is still performed by Zultys personnel.***
- ***SMS short codes are not supported in ZAC.***

11.2 Operation

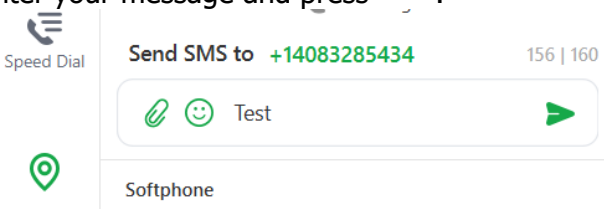
11.2.1 Sending SMS Messages - User Role

1. From the minimized or expanded mode click the New message to icon.

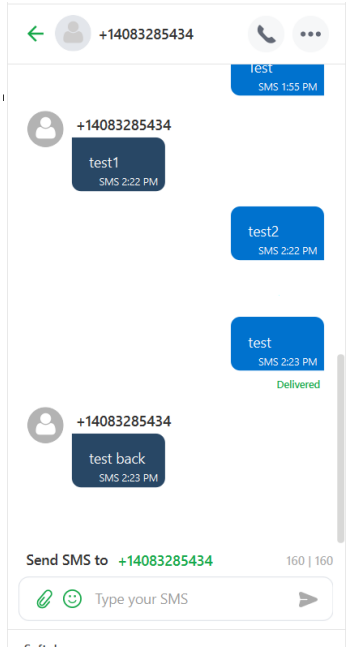


2. Enter the desired SMS number in the "New message to" field. You may click the X to cancel the operation.

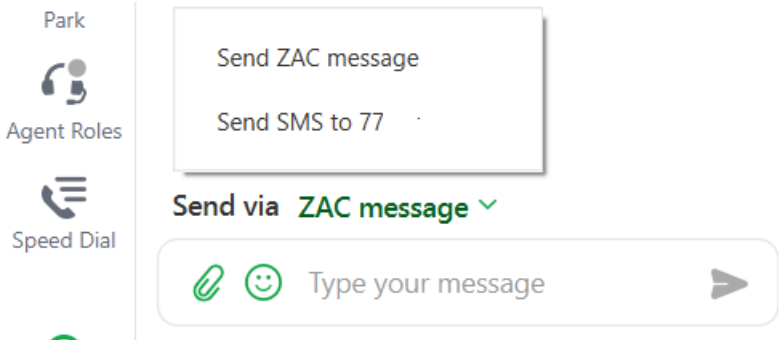
3. Click the icon.
4. At the chat screen, enter your message and press .



5. You will see the response in the Chat area. Continue to enter/receive responses in this area.

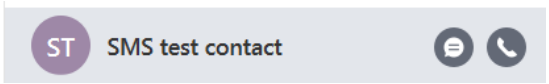


You may also start an SMS message with other MX users that have a mobile phone configured in the system. When you select a user and bring their history screen up, you will see an icon in the lower left corner.
Select via to send via the MX(internal) message or the SMS option to send to the users' mobile phone.

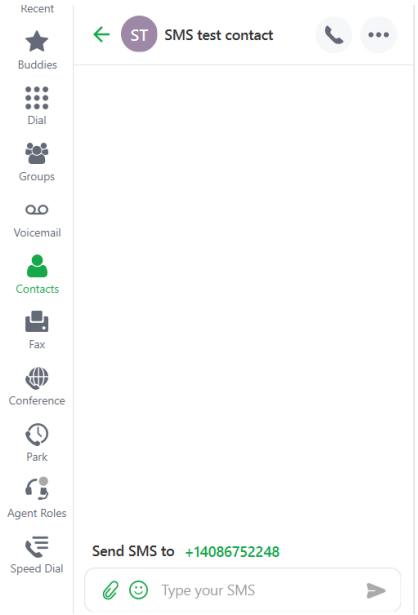


You may also start an SMS message with a contact have a mobile phone configured in the system
Select via to send via the MX(internal) message or the SMS option to send to the users' mobile phone.

Click the text icon in the contact record.



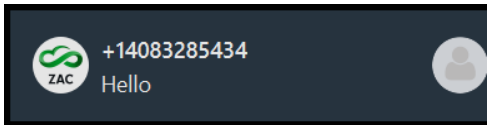
Enter the text and click Send.



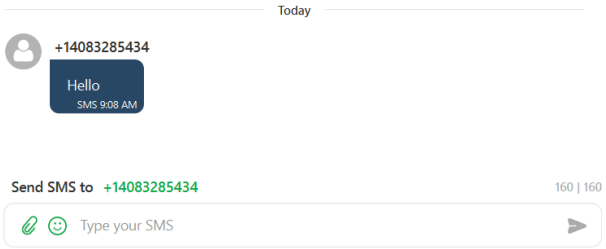
11.2.2 Receiving SMS Messages

A user may send and SMS message directly to your MX DID number.

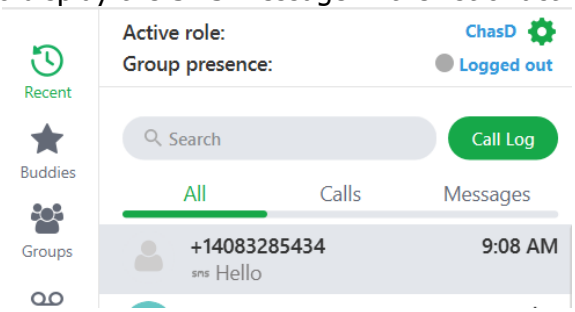
1. When you receive an incoming SMS message, a popup (if configured) will appear and the Recent area will display a notification (if you are not in the Chat screen).



2. Click the popup window to present the chat area.



3. Click the recent area to display the SMS message in the list of activities.



4. Click the entry to enter the Chat area.

5. View responses and type your responses in the Chat area.

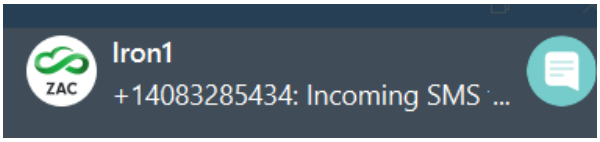
11.2.3 Call Group SMS – Agent Role

Agent Role SMS allows users who are agents of Operator, ACD, or ICC groups to receive and send SMS in their agent roles. Incoming SMS routing to an agent is controlled by your System Administrator. Outbound SMS allows an agent to send an SMS using their group phone number to present to the recipient.

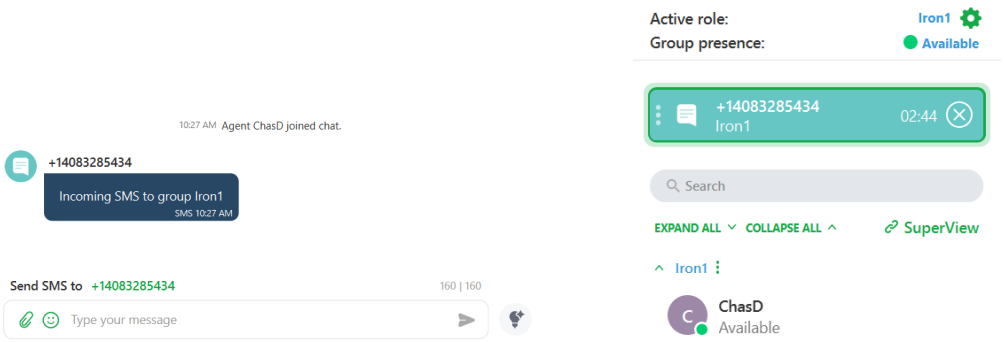
11.2.4 Operation

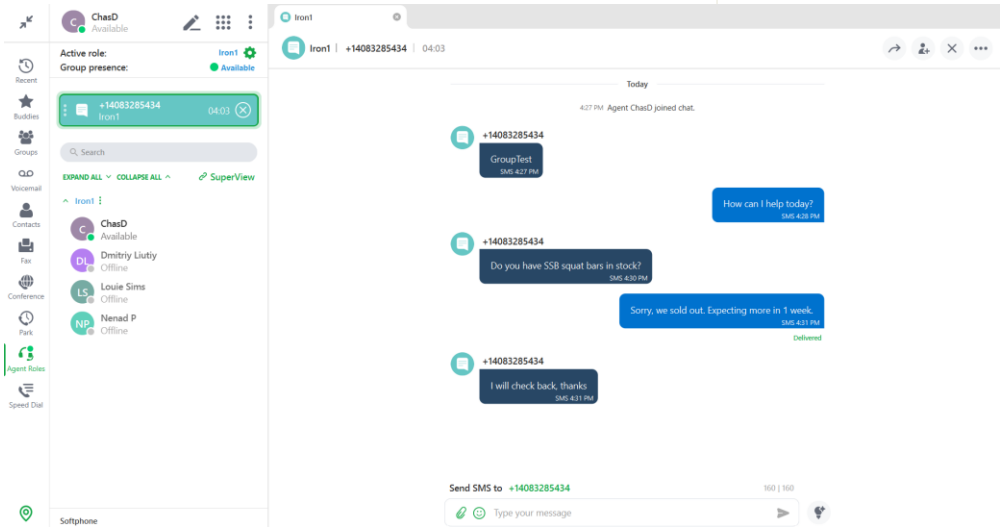
11.2.4.1 Notification of an incoming SMS to an agent:

A popup notification will appear.



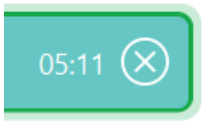
Text session after clicking Accept



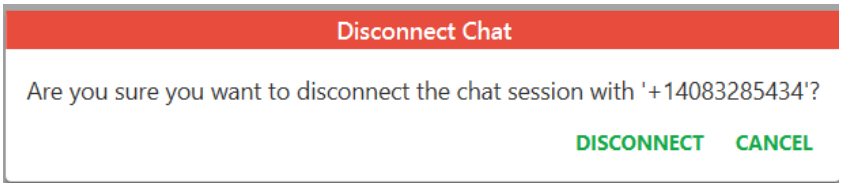


You may converse with the external user in the chat text entry area.

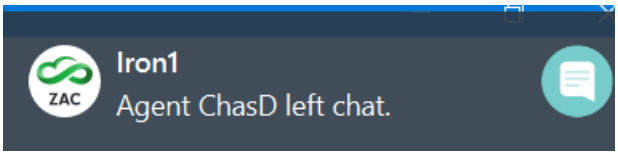
- Disconnecting the session:
  When you are finished, click the disconnect icon



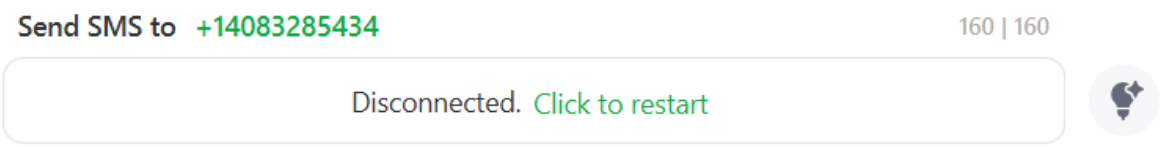
or
A confirmation will appear:



Click DISCONNECT to end the session.



An agent may restart a disconnected session:

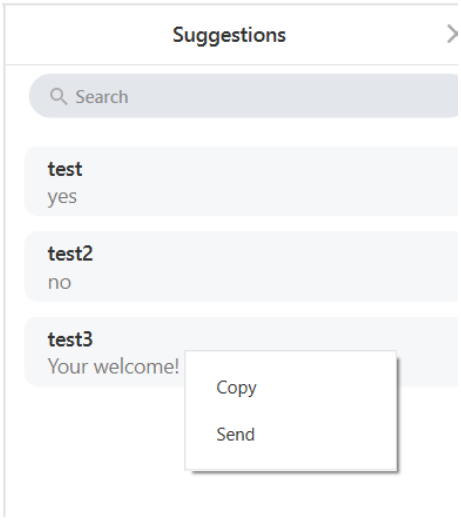


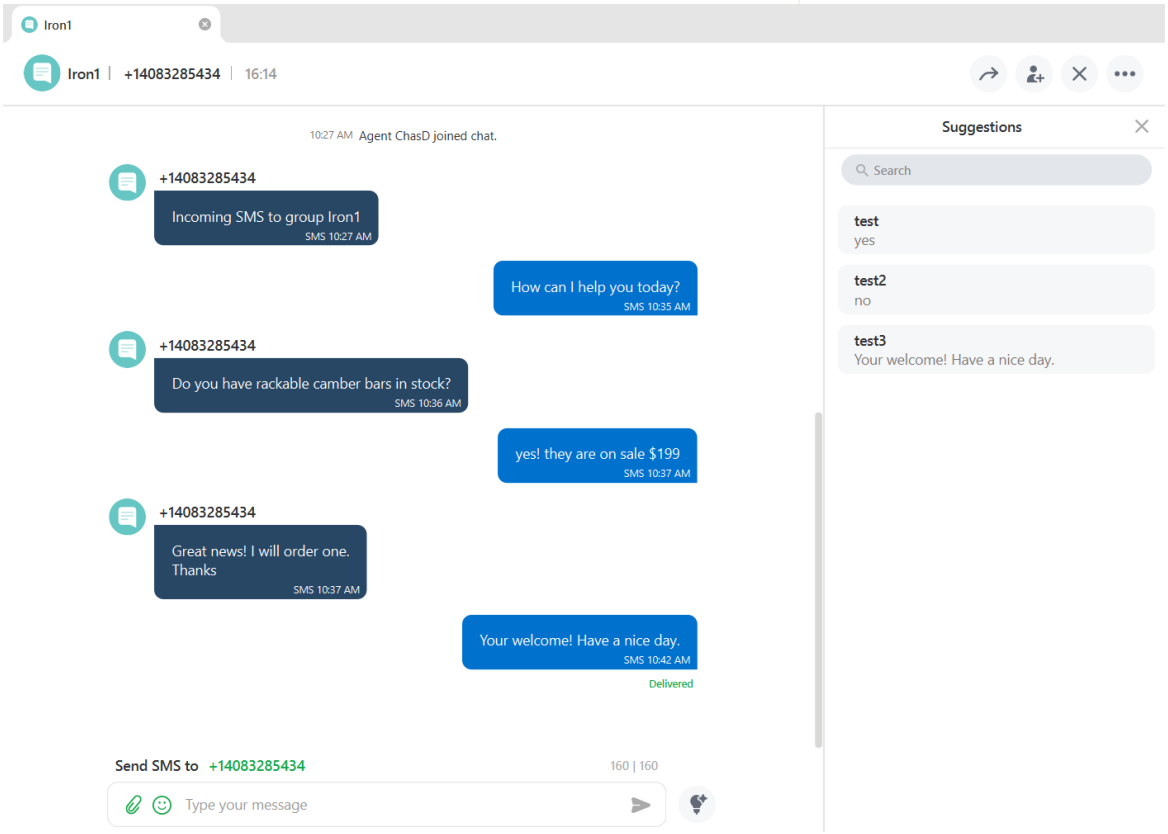
11.2.4.2 Session options

Suggestions – The System Administrator may have configured pre-programmed suggestions to make common conversation items easy to select.

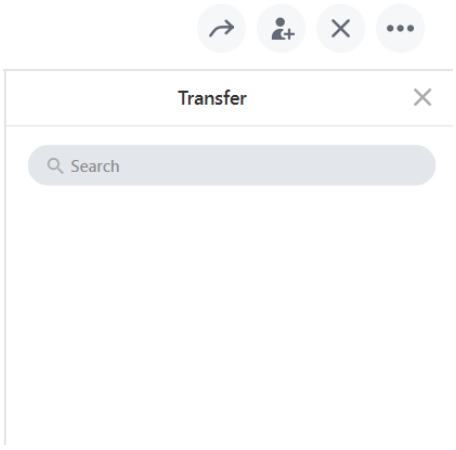
Click to display the list of suggestions.

Right click on the suggestion and click send.



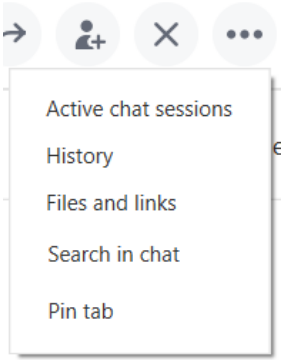


Transfer – Agents may transfer the SMS session to another agent in the group.

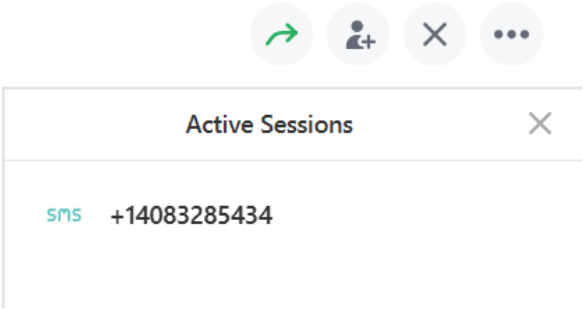


Disconnect – Click this icon to disconnect and stop the SMS session with the external user.

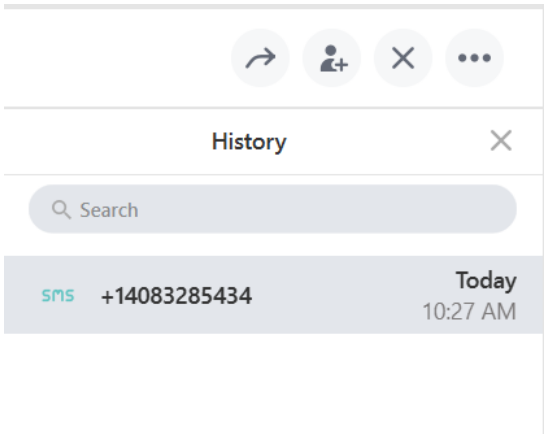
Click the More icon to reveal more session options.



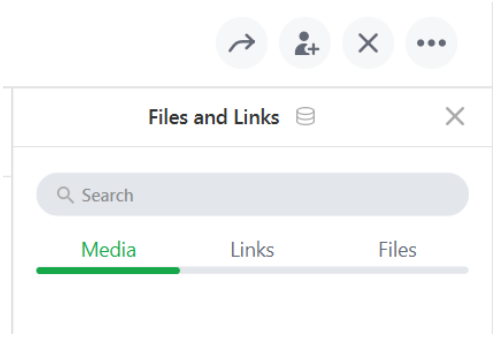
Active chat sessions – Displays a list of the active SMS sessions that an agent has.



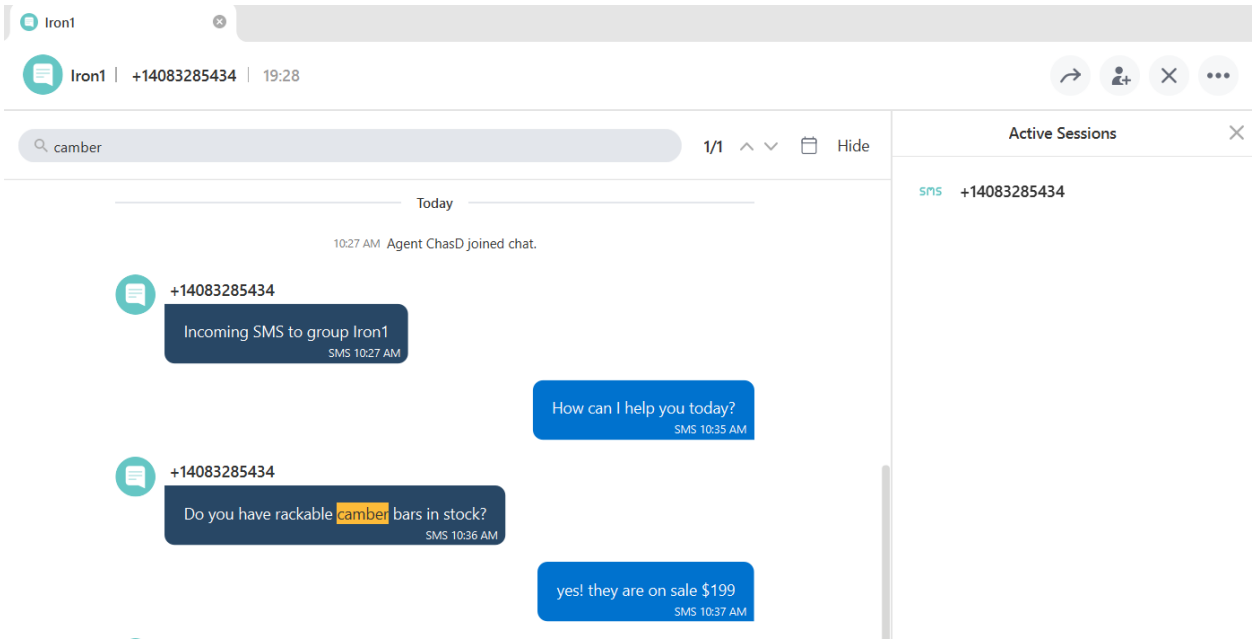
History – Agents can view their session history and select a session to review the exchanges. Click on the session to display the history.



Files and Links – The agent may display a list of media, files, and links that were exchanged in an SMS session.



Search in Chat – Allows an agent to search a SMS session based on specific keywords.

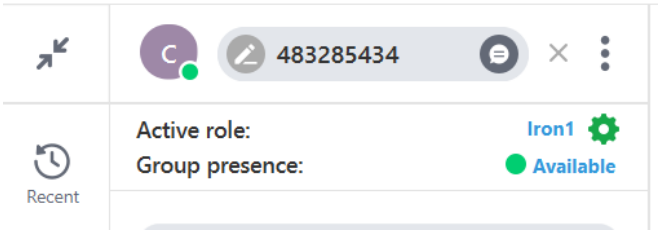


Pin tab – This option will pin the current session tab so that any new selections will not remove the tab form view.

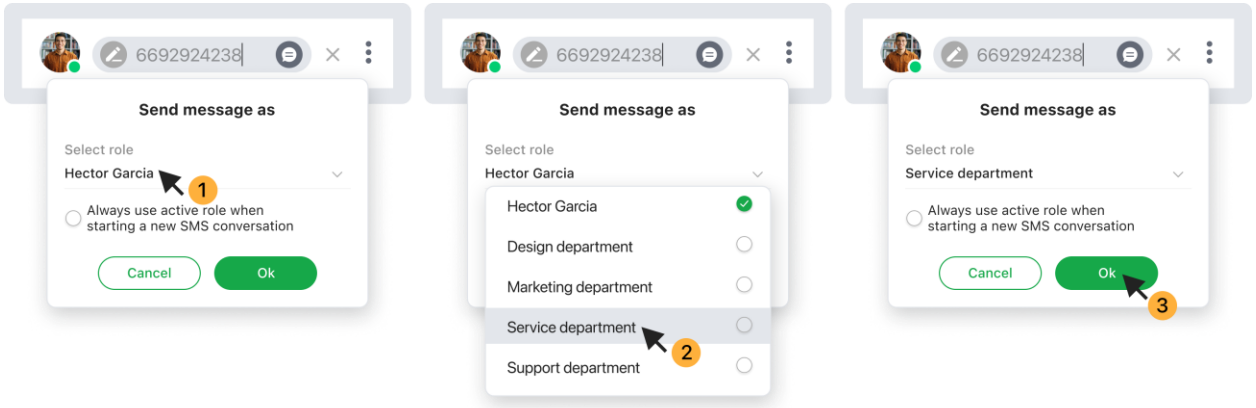
11.2.4.3 Outgoing SMS session – Agent Role

Agents can initiate outbound SMS messages in their agent role. This presents call group or other phone numbers to the external recipient.

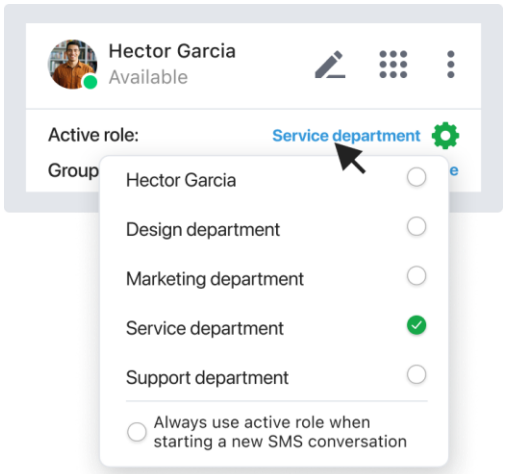
Enter the number to send the SMS to and press ENTER:



Select the role from the drop down menu and click OK.



NOTE: If you only use one role for outbound you may select the "Always use active role when starting a new SMS conversation". This will eliminate the need to select a role for each SMS conversation.



11.3 Conditions

- SMS to a call group utilizes WebChat as the infrastructure to deliver SMS messages to agents. The WebChat feature must be enabled and configured in the MX system.
- SMS is not applicable to Number Associations in the call group.
- Incoming messages are distributed to agents based on the Call distribution setting in the General tab of Operator and Call Groups in MX Administrator.
  In the case of a ring all type, all agents will receive the notification. Once an agent answers, notification is removed from other agents that did not answer the call.
- If an agent declines the SMS message, the message is routed to the next available agent in the group.

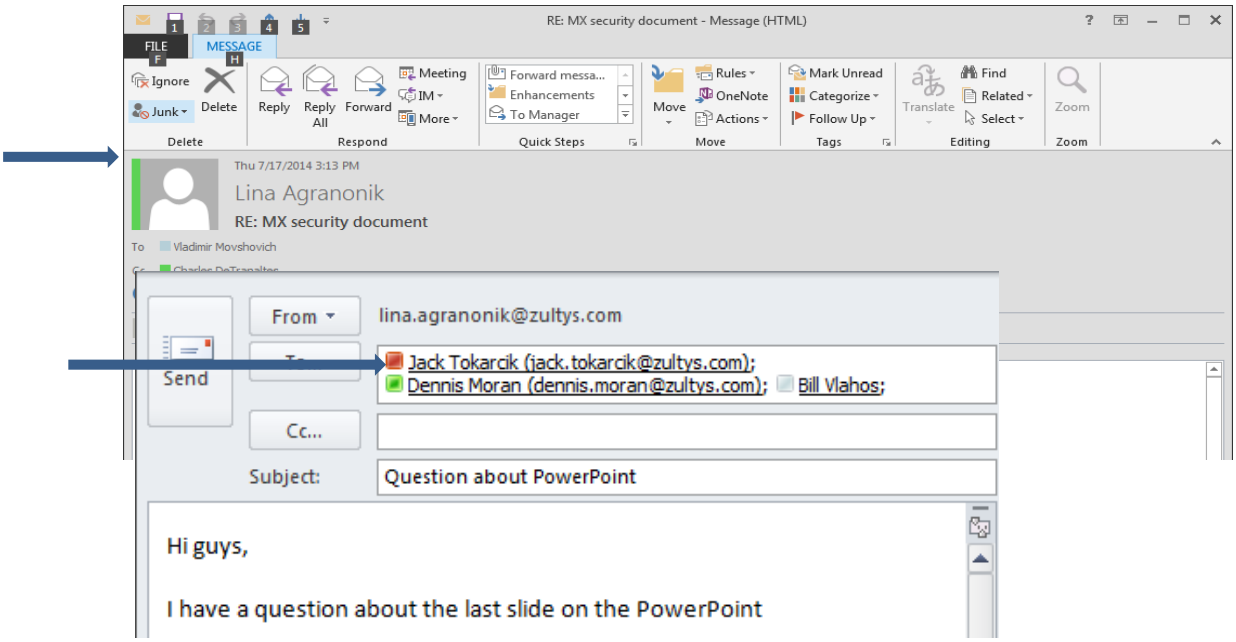
12 Microsoft Office Unified Communications

12.1 Description

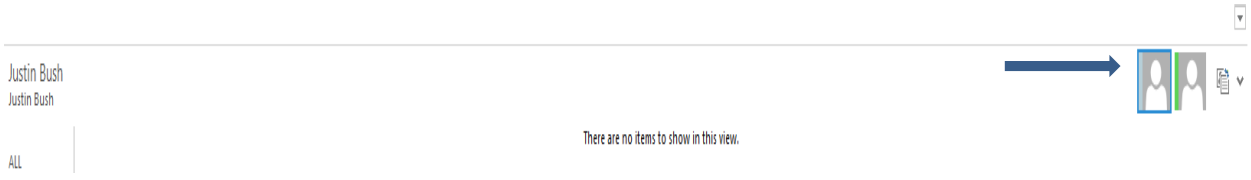
This feature allows Windows based ZAC presence information to be shared with Microsoft Outlook 2010+ versions. ZAC users' presence status can be viewed within the Outlook application without the need to view the ZAC application itself.
In addition, actions such as call, Instant Message can be initiated from Outlook as well.

12.2 Operation

Once the feature is enabled in ZAC Settings, operation is inherent. Presence status is shown for all e-mail recipients in Outlook:



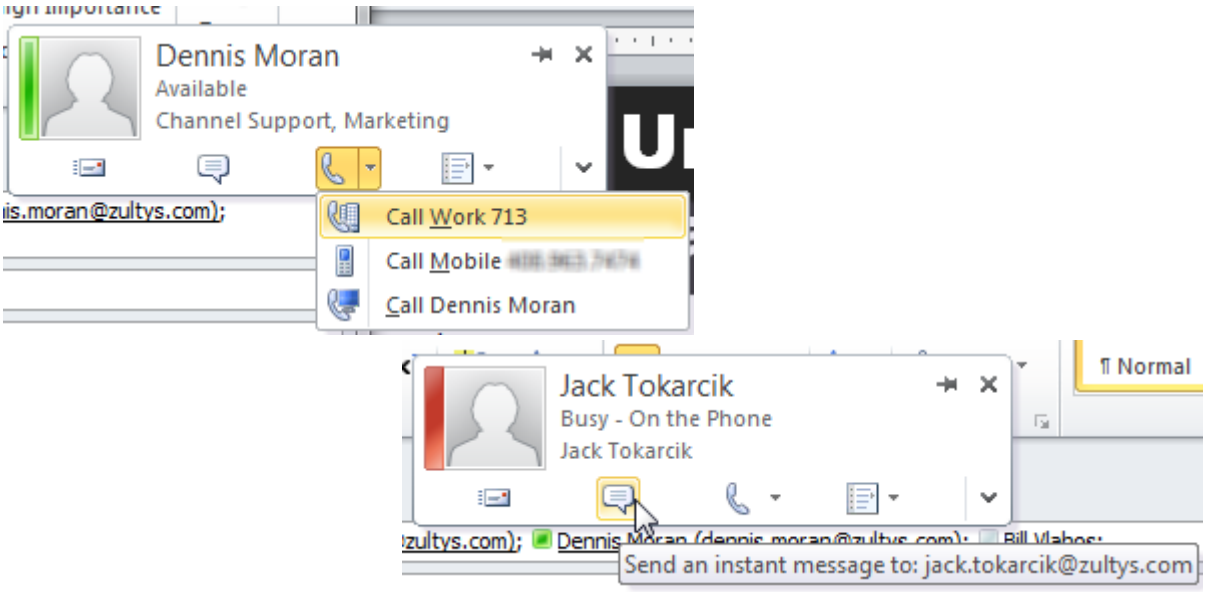
Presence Status is also shown in the People Pane of Outlook.



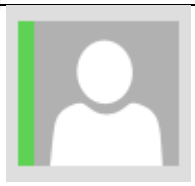
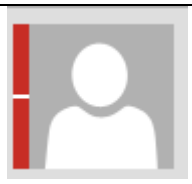
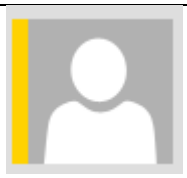
Moving your mouse over the presence area of a user will present the quick action menu:

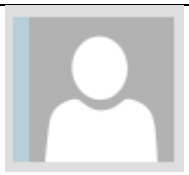
From the quick action menu you can:

- Initiate an IM session. ZAC IM window will appear. Depending on your ZAC settings, ZAC may appear.
- Place a call to the user. ZAC will be invoked. Depending on your ZAC settings, ZAC may appear.
- Send an e-mail using Outlook



MXIE Presence Status	Outlook Presence Status

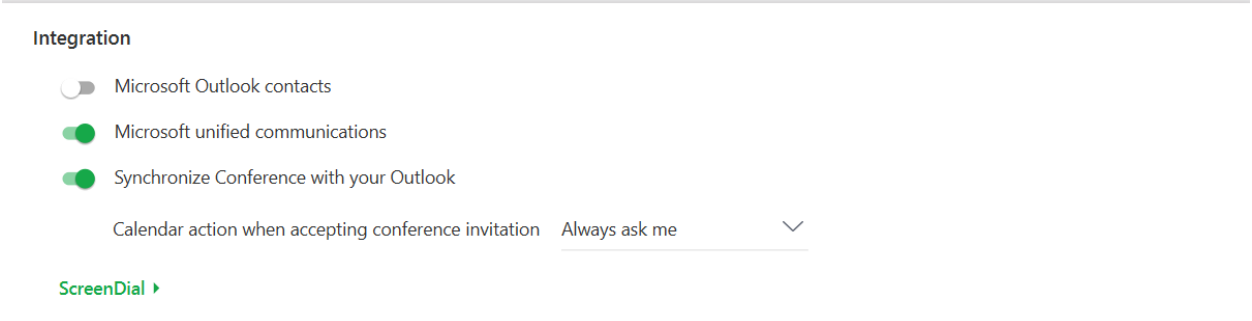
Available	 Available
Not Available	 Do Not Disturb - Not Available
Busy	 Busy
At Lunch	 Away – At Lunch
In a Meeting	 Busy – In a Meeting
Be Right Back	 Away – Be Right Back

Appear Offline	 Offline

12.3 Conditions

- Outlook 2010+ must be installed on the users' PC.
- This feature operates independently of Zultys Outlook Communicator or Microsoft Exchange Communicator (MSEC). Neither application is required for this feature to be utilized.
- This feature does not require an Exchange Server to be present.
- This feature does not require any additional license to operate. The only requirement is a valid user license and MXIE must be installed and running on the MX system.
- The Microsoft Web based application SharePoint must be run in Internet Explorer to view presence status. Firefox, Chrome, Safari web browsers will not support the Unified Communications integration.
- Outlook supports one direct connection presence application from external programs. If the user already has an external presence sharing associated with Outlook, Skype for example, enabling the Zultys feature will disable the Skype presence
- The e-mail address in Configure\Users in MX Administrator must be programmed.

ZAC/Settings/Application



Slide the control to enable the feature and click Apply.

- Microsoft .NET Framework 4 (or greater) must be installed/active on the users' PC in order for this feature to operate properly.
- This feature is only supported on Windows based Zultys Advanced Communicator.

13 Video Calling – User to User

13.1 Description

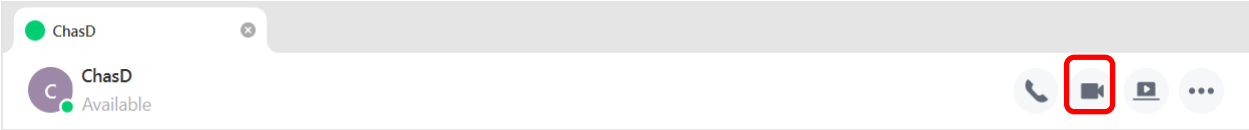
Zultys Advanced Communicator (ZAC) users can place video calls to other ZAC users.

13.1.1 Video Calling Requirements:

- ZAC 9.0.36 (or greater) required
- ZAC MUST be bound to the Softphone
- ZAC MUST be in full screen mode

13.2 Operation

While in a user tab, click the Start video icon:



A call will be placed to the user.

When the user answers, your video is displayed to that user.

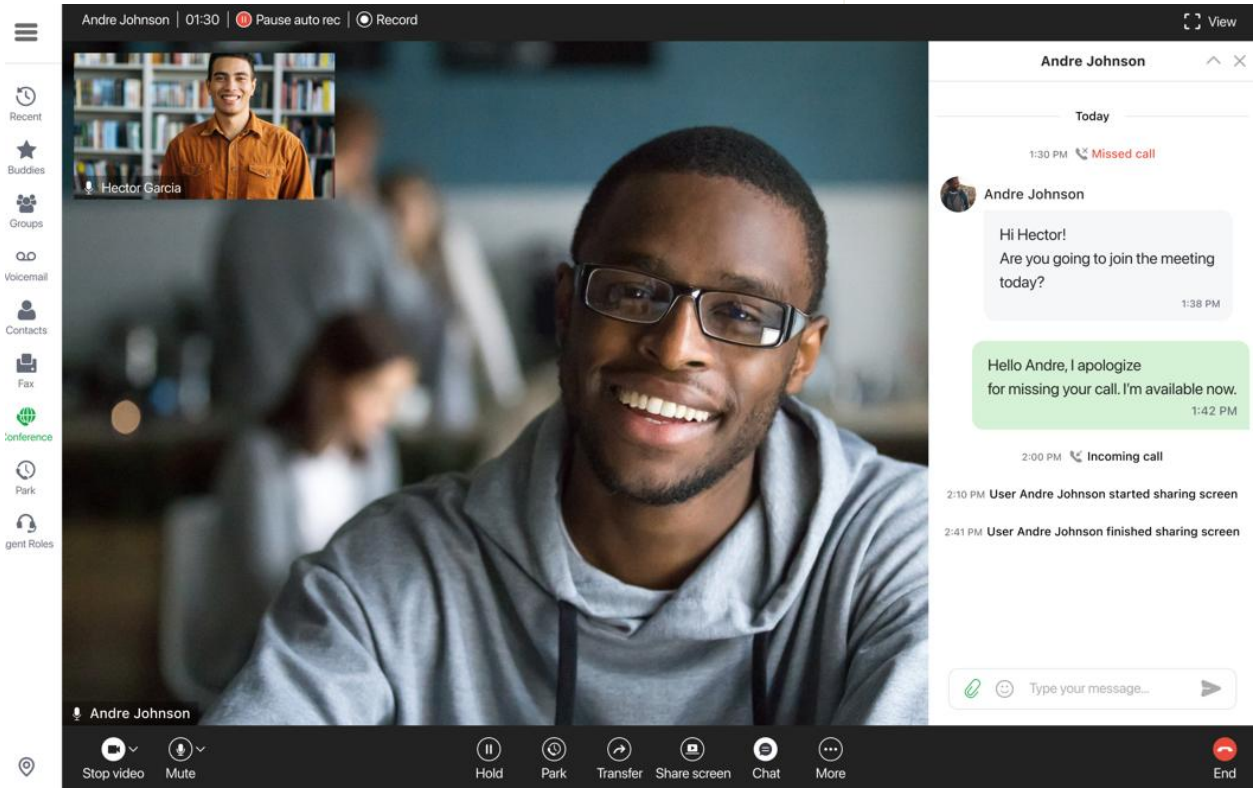
The called user clicks the Start video icon in the session bar to start their video.

Either party may start/stop their video portion of the call using the start/stop video icon, This icon toggles the start and stop states.

To maximize the video window, click the

icon and select the desired view.

To open a chat window, click the icon:



To end the call, click the end call icon in the session bar

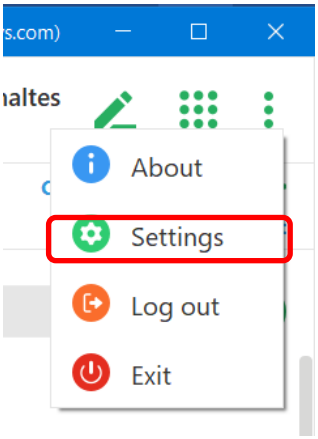
13.3 Camera selection

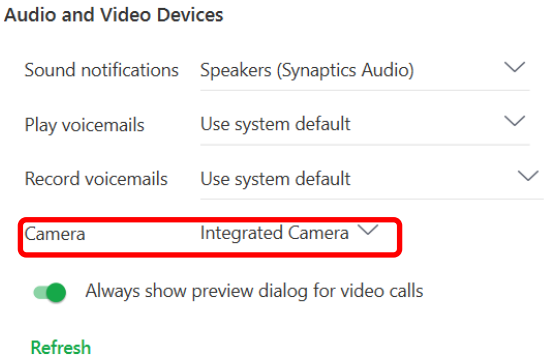
13.3.1 Description

This setting allows you to select the desired camera on the host PC to utilize for video calls.

13.3.2 Operation

Settings>Application>Audio and Video Devices





Use the camera drop down menu item to select the desired camera to use.

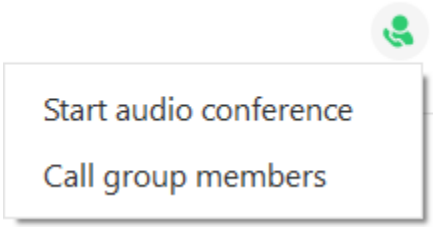
The preview dialog option allows you to select video prior to joining a video call.

14 Video Calling – Multi-Party

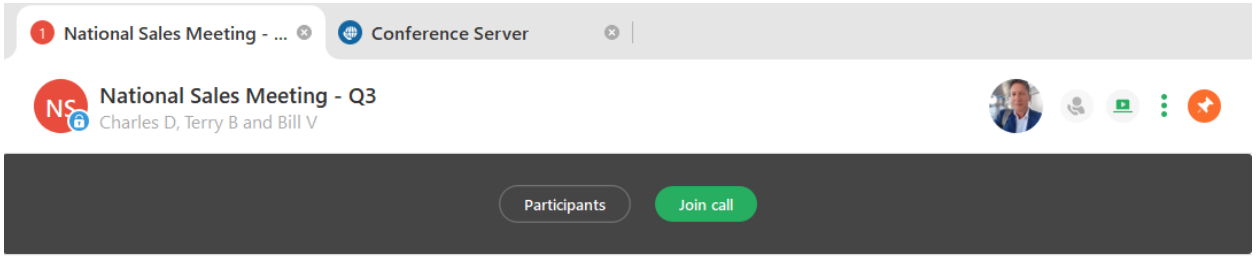
Zultys Advanced Communicator (ZAC) users can now place video calls to multiple ZAC users as well as external parties. This feature now allows video, screen share, and file transfer between the users/external parties in addition to voice and chat capabilities.

14.1.1 Starting a video conference

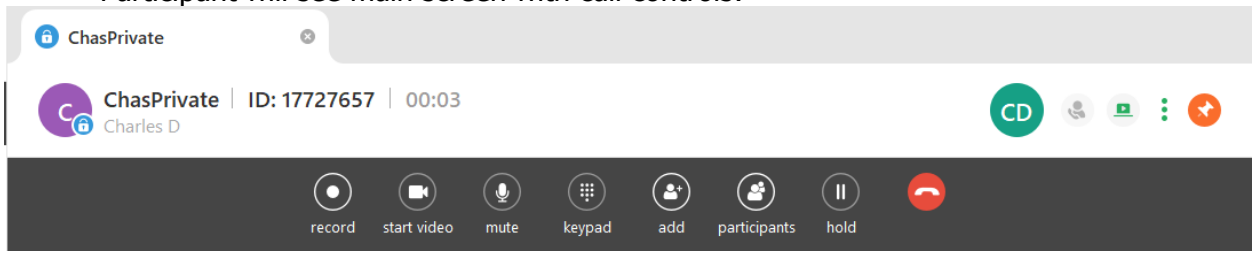
- While in a Chat group, start an audio conference call using either start option:

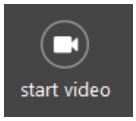


- Participant will click on join call.



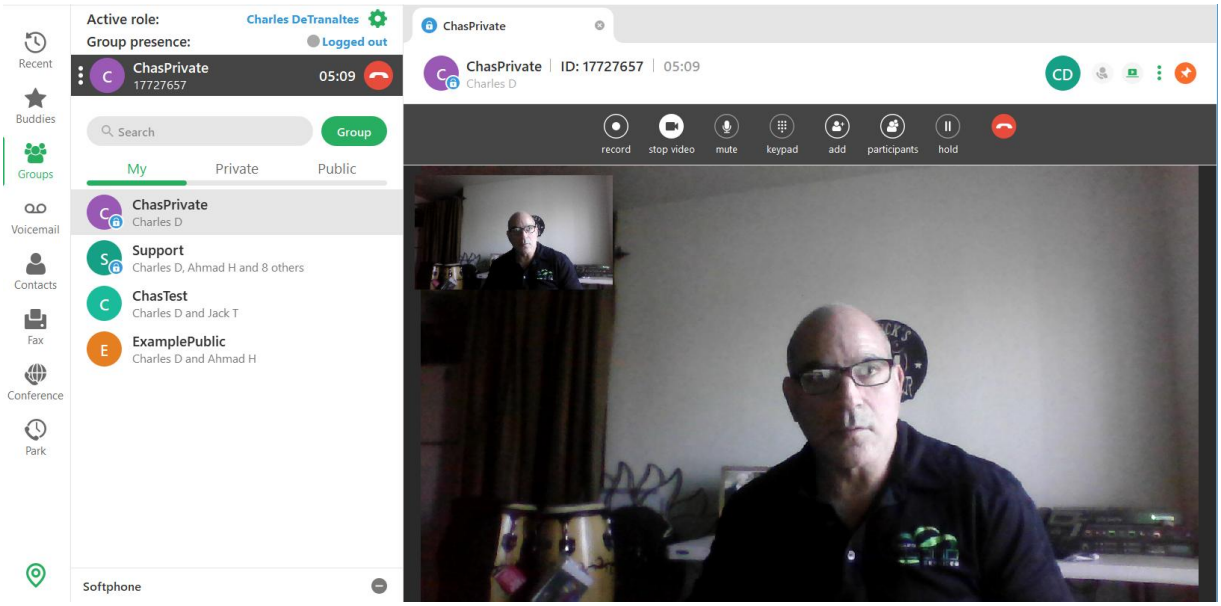
- Participant will see main screen with call controls:



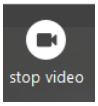
- Participants will click the 

icon to start their video stream:
- The collopased mode video screen is displayed:

14.1.2 Host view:



The default setting for a multi-party video conference is Speaker mode. This mode will always present the currently speaking participant as the main video screen for other participants.

- Participants may stop their video by clicking the 

icon in the upper toolbar.

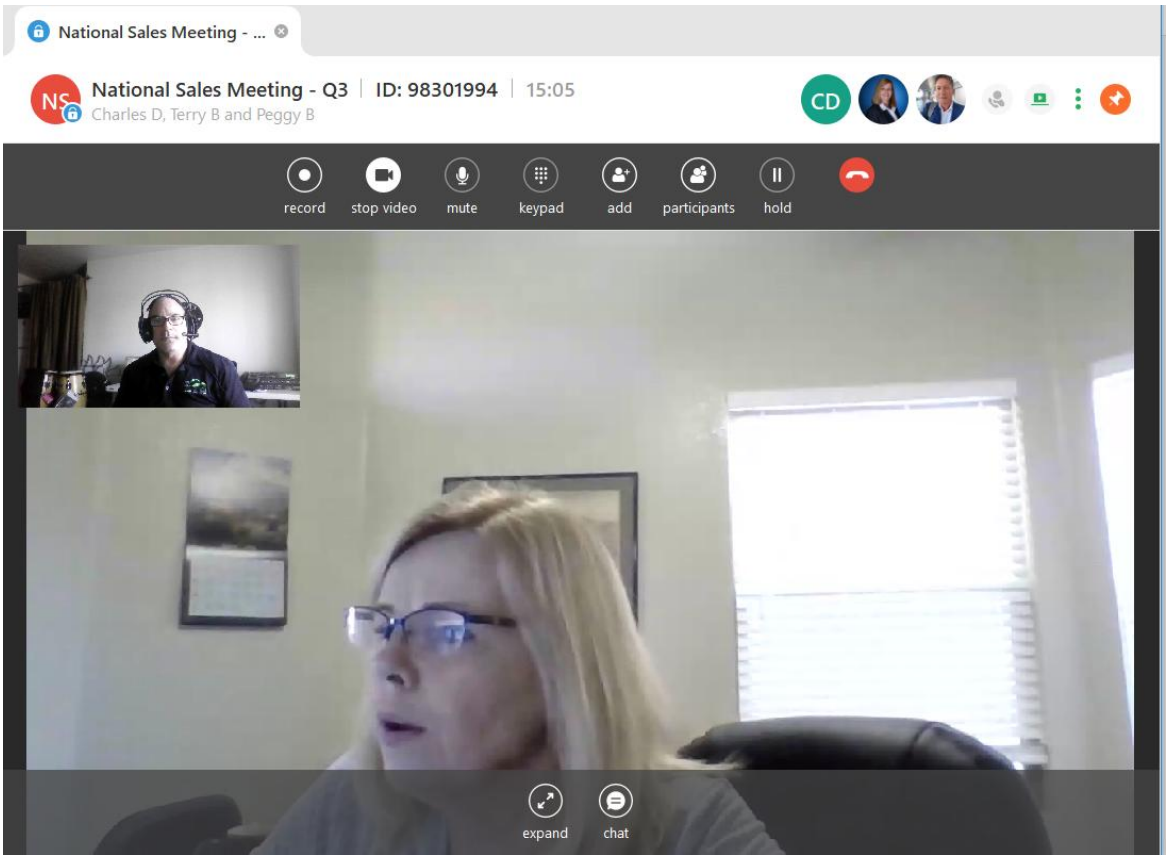
14.1.3 Collapsed - Expanded mode

Participants may choose between collapsed and expanded modes.

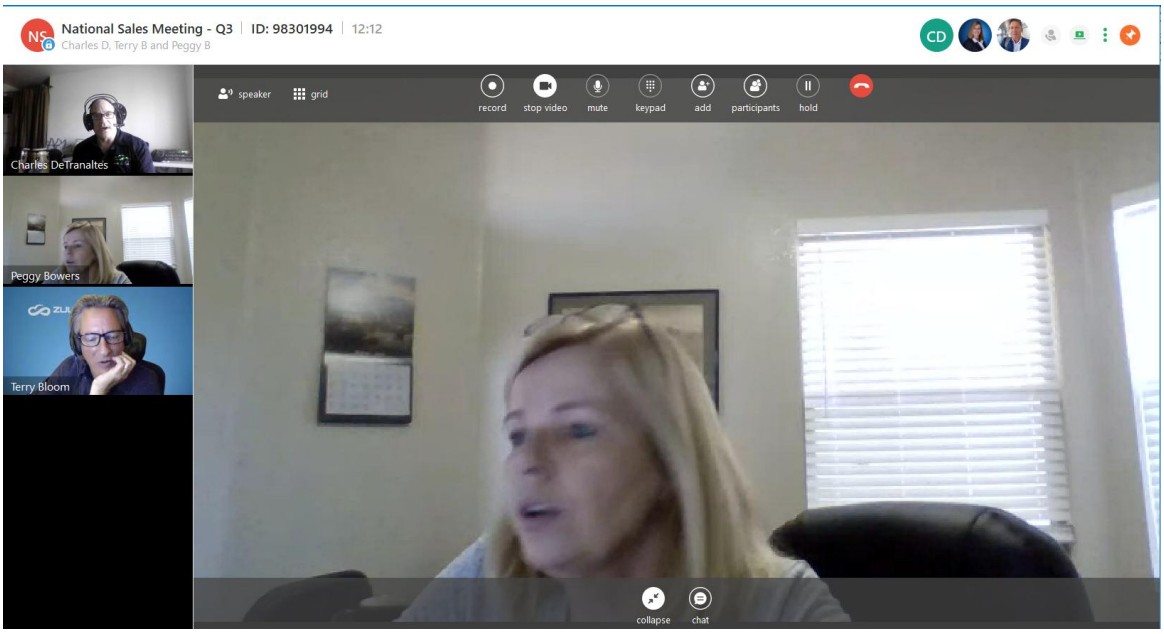
- To choose expanded mode, click the

icon in the bottom toolbar.

- Participant speaking in collopased/speaker mode:



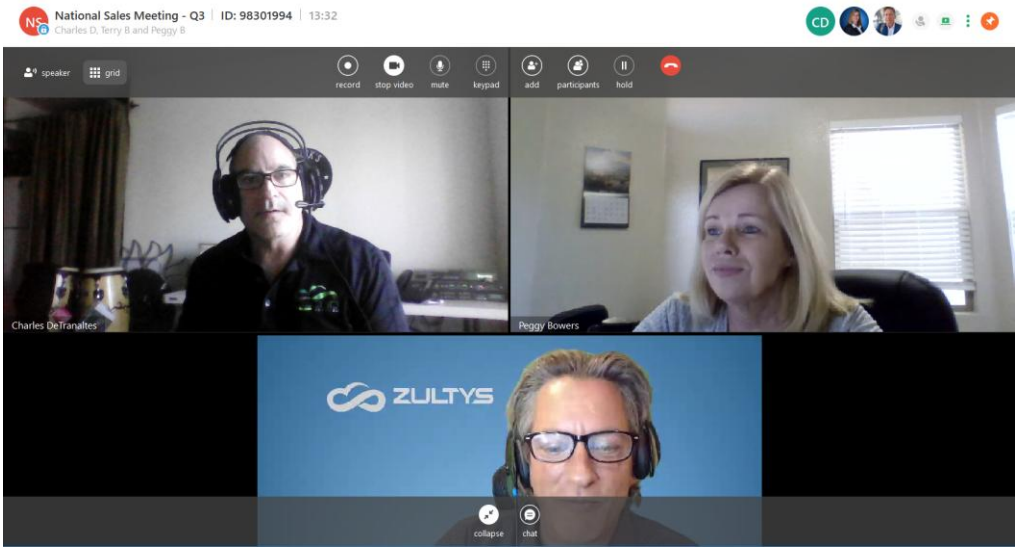
- Participant speaking in expanded mode/Speaker mode:



14.1.4 Speaker – Grid mode

Participants may choose between speaker and grid modes. Please note that Grid mode is only available when in the expanded mode.

- To choose the grid mode, click the icon in the top toolbar.

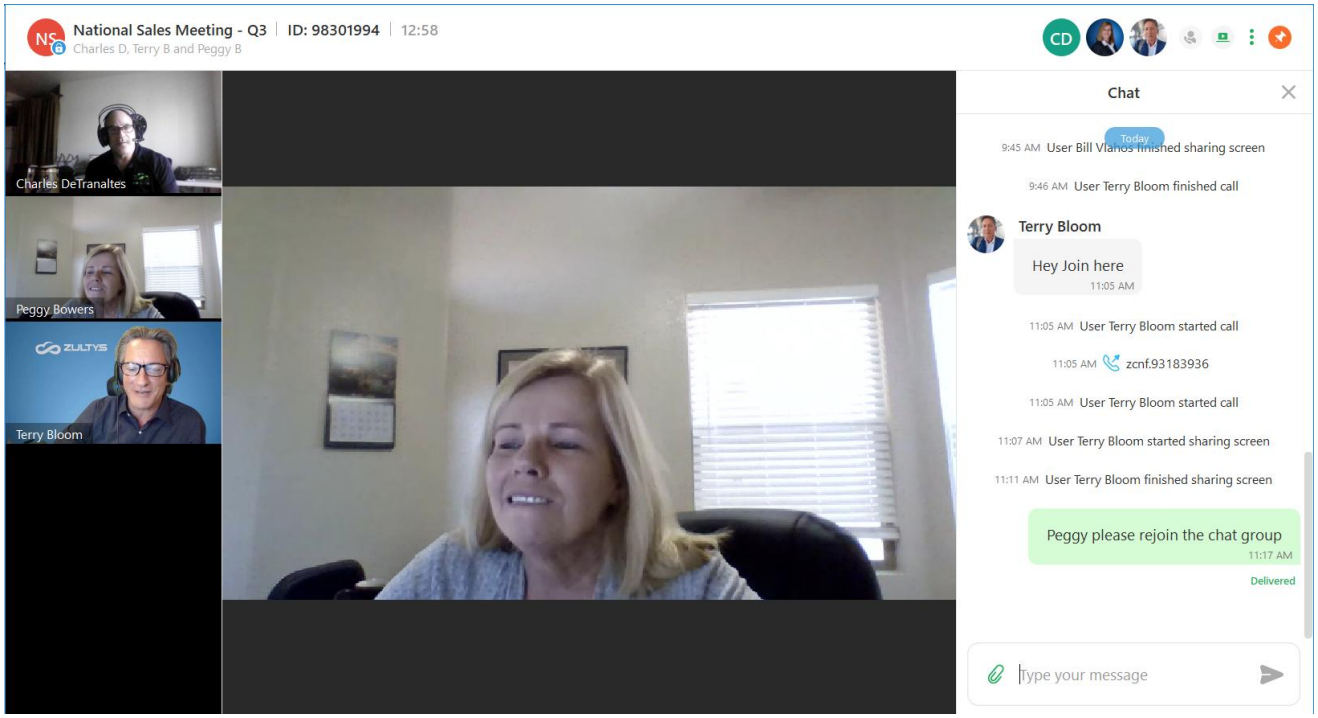


14.1.5 Chat session

Participants may also have a group chat session in the conference. Please note that Chatd mode is only aviailable when in the expanded mode.

- To open the chat session window, click the

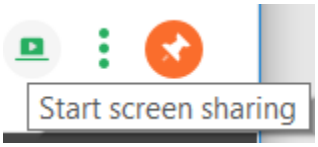
icon in the bottom toolbar. A chat window will open and you may send group chats to all participants. Click the X in the Chat window to remove the chat window form the screen



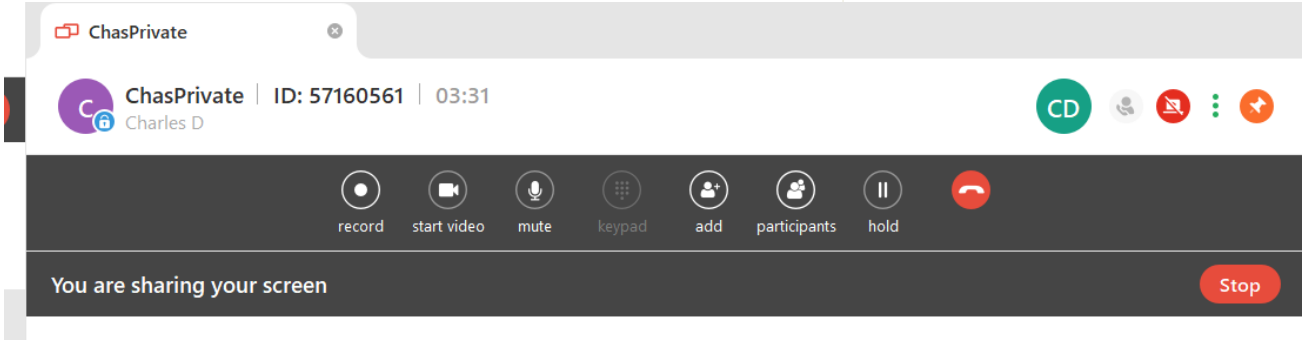
14.1.6 Screen share

Participants may also share their screen with other particpants. Please not there may only be one participant sharing their screen at a time.

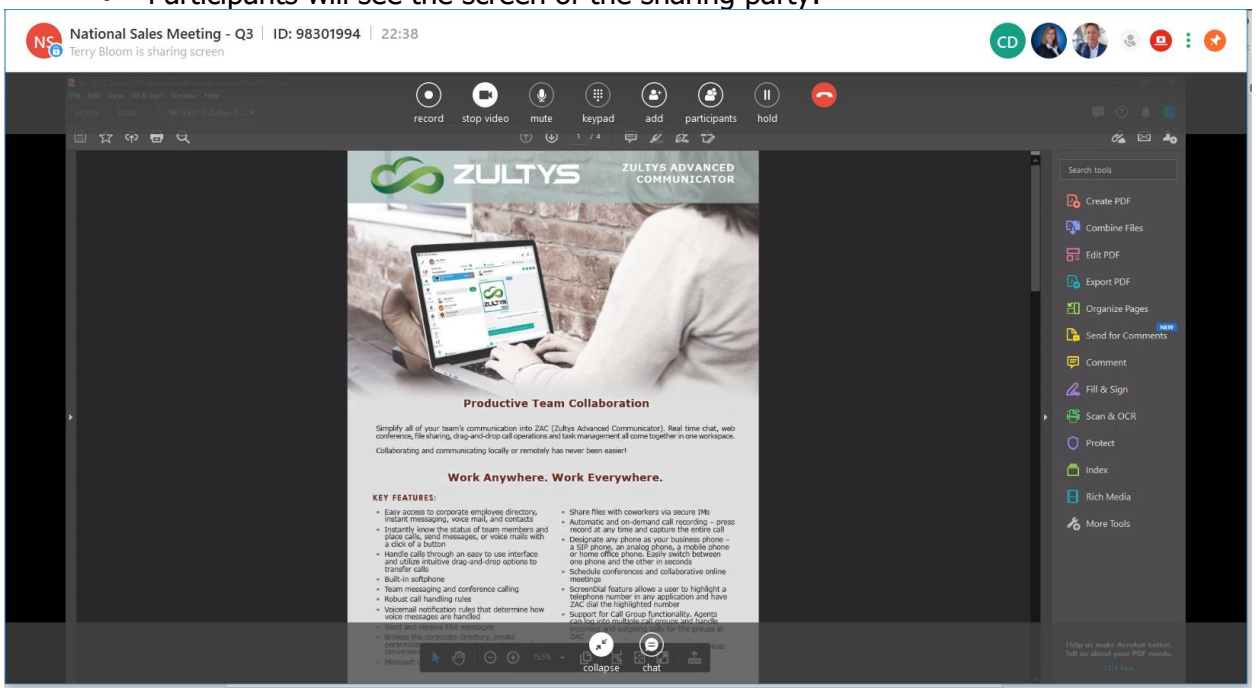
- Participant clicks on the Start screen sharing icon:



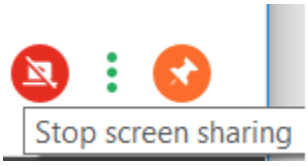
- Particpant who started screen share will see:



- Participants will see the screen of the sharing party:

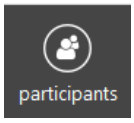


- Click Stop to end the screen sharing session.
- Participants viewing a screen share session may exit the screen share by clicking the Stop/Exit session icon:

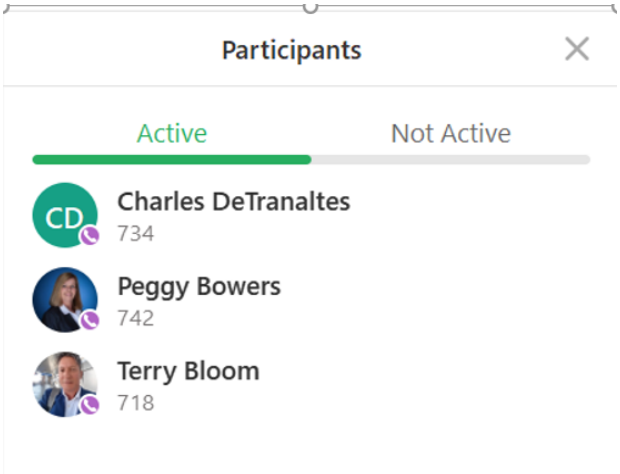


14.1.7 Participants

A user may view all the Participants of the video conference

- Participant clicks on the 

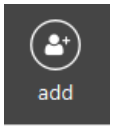
icon in the upper toolbar:



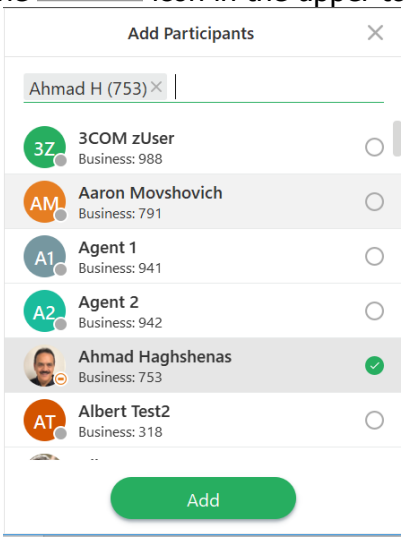
- Click X to close the Participant window.

14.1.8 Add party

You may add a party to an exiting video conference.

- Participant clicks on the 

icon in the upper toolbar:



- Select the desired users to add to the conference.
- Click add or X to cancel

15 Command line parameters

15.1 Description

ZAC supports a number of command line parameters.

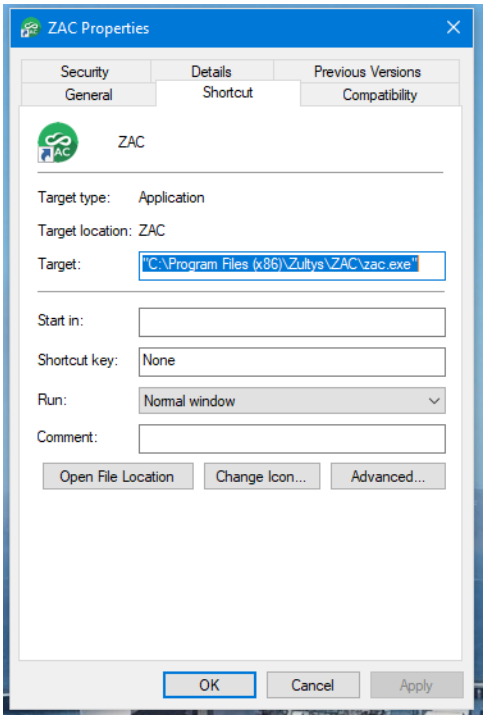
Upon installation of ZAC a default shortcut is automatically placed on the Windows Desktop, as well as in the 'Start Menu | Zultys folder. The simplest way to apply command line parameters is to create a copy of the default ZAC Shortcut and edit the target properties.

15.1.1 Steps to copy and edit shortcut:

1) Select Start | All Programs | Zultys – Right click on ZAC and select copy.

2) Paste the copied shortcut to the desired location and rename as required.

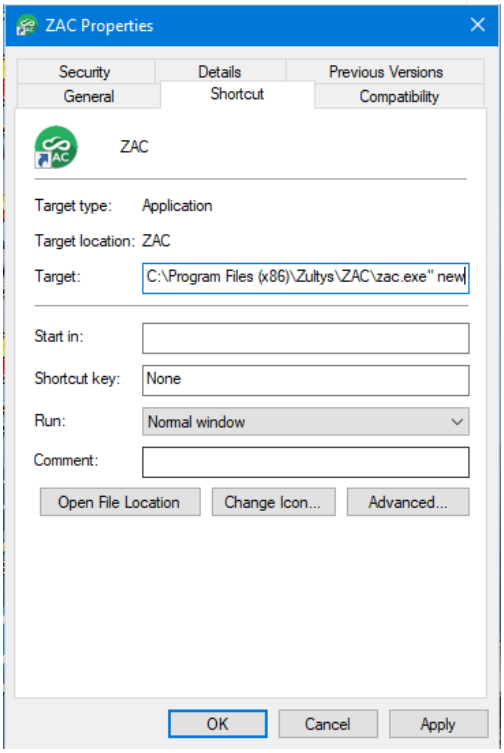
3) Right click new shortcut and select Properties, ensure that Shortcut tab is selected



Type the required command line parameters at the end of the target field. For example:

"C:\Program Files\Zultys\ZAC\Bin\zac.exe" new

Will start a new instance of ZAC



15.1.2 Macintosh

You can use AppleScript (which comes with all versions of the Mac OS) to run command line parameters.

You will need to create a new AppleScript and with the following single line statement. do shell script "open -n -a /Applications/zac.app --args new"

You may then save it as an Application.

15.1.3 Available parameters:

Function	Syntax	Example
Login Screen Parameters		

Function	Syntax	Example
Login Name	n=[User Name]	n=john.doe - Login as the user "john.doe".
Password	p=[Password]	p=1234 - Login with the password "1234".
MX IP Address/URL	u=[MX Address]	u=192.168.1.100 - Connect to the MX at 192.168.1.100.
Exit	exit	Exits ZAC
New Instance	new	Starts a new instance of ZAC
Logout	logout	Logs out the current user and presents the login screen
Force Agent Role	forceActiveRole=<agentGroupProperty>	If set will force all outgoing calls through agent group, provided in <agentGroupProperty> which is the value by extension or name. If cmd line set, active role change should is disabled in ZAC UI.
Roles	roles=[role_list]	• roles=[all] - Logs user into all their roles. • roles=[Main_Operator,Sales] - Logs user into call groups named "Main_Operator" and "Sales". Separate each call group with a "," (comma) and no spaces. **Note:** that the Role screen cannot be bypassed if multiple locations are defined on the MX. Specified roles will be checked, but the user must click *OK* to continue. Call Groups cannot be named "all" if there is a call group with this name the roles=all will not function properly, as a workaround use "all_roles" instead of "roles=all" or rename the call group.
Call	(call=<number>)	Start ZAC and place call to specified number

Function	Syntax	Example
Location	location=[location name]	Start ZAC and use the location specified in the command line
Bind to Device	b=[device_id]	For example: b=000BEA801234 - Binds to Device ID 000BEA801234

16 ZAC 8.2 Features/Functionality

This section describes the new features added starting in version 8.2.

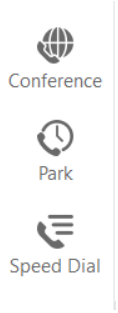
16.1 Speed Dial

16.1.1 Description

System Speed entries are now available directly from the ZAC interface. ZAC users may initiate a call to a pre-configured number using this feature.

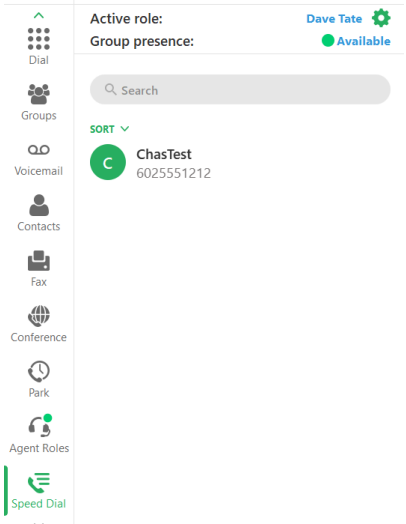
16.1.2 Operation

Click the Speed Dial icon in the left menu bar:



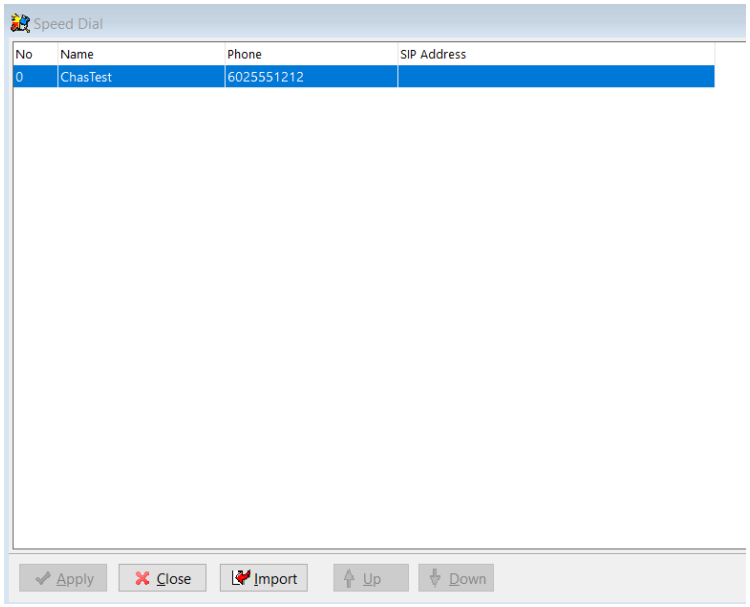
Note: If you have Agent Roles enabled, the Speed Dial icon is below the Agent Role icon. You may use the scroll arrow to display the Speed Dial icon.

Select the desired contact/number and click the call icon:



Conditions

- System Speed dial numbers are configured in the MX Administrator program. MX Administrator>Configure>System Speed Dials



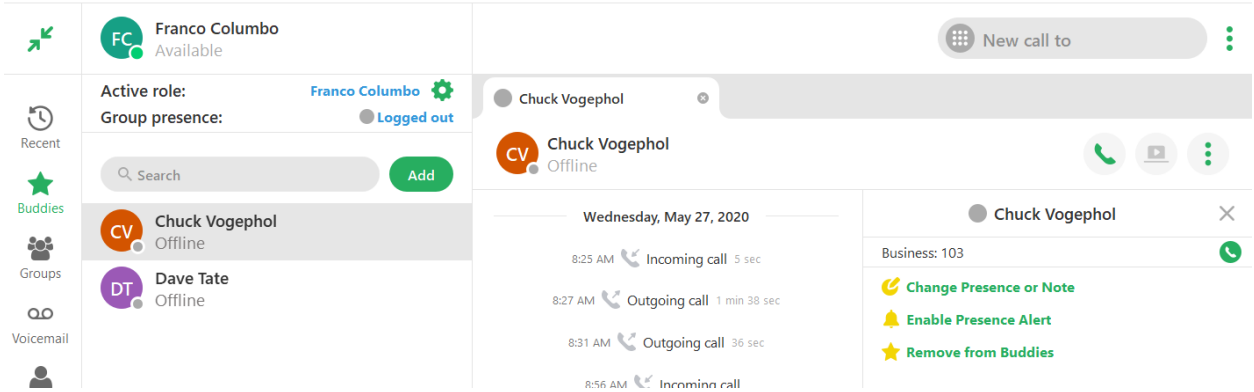
16.2 Change another user's presence

16.2.1 Description

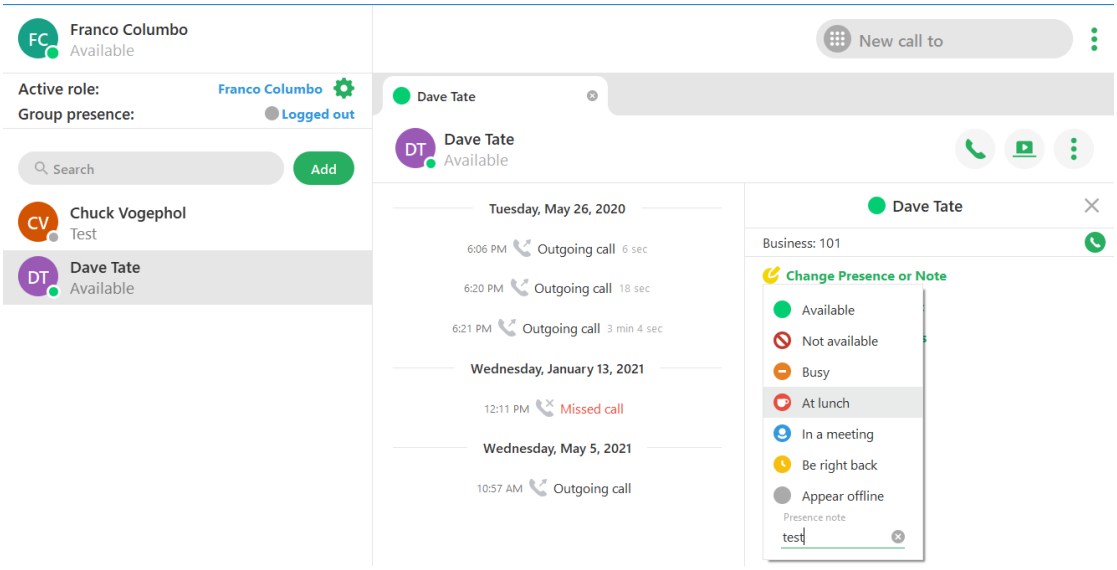
This feature provides a method for a user to change another user's presence and their presence note.

16.2.2 Operation

Click the desired contact/buddy and select Info from the more menu:



Click the Change Presence or Note option. Enter a note and select the desired presence for the user.

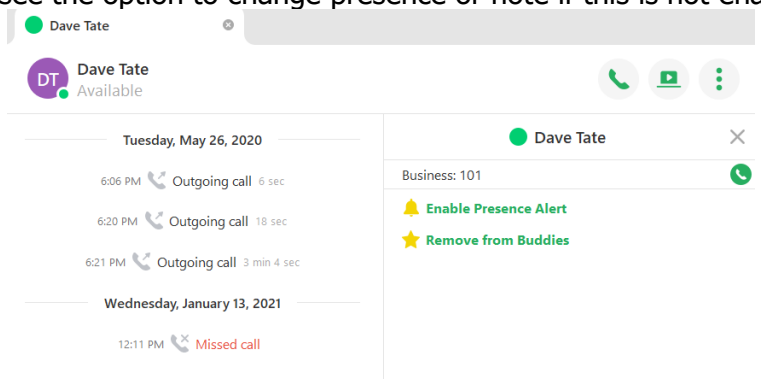


The user's presence and note are updated.

Conditions

- A user must have privileges to change another user's presence and note. This is configured in MX Administrator>Users>User Profiles>General tab.
  A checkmark indicates users with this profile may set other user's presence/note.
  ☑ Can set presence / presence note of other users

  A user will not see the option to change presence or note if this is not enabled:



- A user must be logged into ZAC in order for this feature to function. Users' may not perform presence change on a ZAC user that is not logged in.

16.3 User Profile Settings

16.3.1 Description

This feature allows administrators to enable/disable certain features in MX Administrator that are available to ZAC users. This allows a method to hide feature functionality from ZAC users.

16.3.2 Operation:

MX Administrator>Users>Profiles

Features in the General, Client settings and Misc tab can be configured. The items that may be configured are:

General tab:

- Enable voice mail
- Can view parked calls
- Enable ZAC usage

    Enable IM ***(please note conditions)***

    Enable video

    Can change presence/presence note of others

- Can return calls from voice mail

Client tab:

- Manage multiple calls via

Misc tab:

- Call Handling rules
- Softphone
- Call monitoring
- External Phone associations>Allow binding to ZAC

16.3.3 Conditions

- Disabling IM prevents the operation of IM and file exchanges for Webchat agents. User profiles configured for WebChat agents should always have IM enabled.
- ***Please note that Video capability is configured to OFF by default in User Profiles. Video must be configured to ON for ZAC users wanting to utilize video functionality. Please note that configuring video to ON when a user is on an active call will result in the user being able to start video immediately while on that call.***

16.4 ZAC Local File encryption

16.4.1 Description

ZAC will now encrypt files that are locally downloaded on a user's PC.

16.4.2 Operation

None. This operation is automatic and no configuration changes in MX Administrator or ZAC are required.
The following file types will be encrypted:

Voicemail
Call recordings
Faxes
Chat files
Greetings
Local database

16.4.3 Conditions

- The contents of these files cannot be accessed outside ZAC.

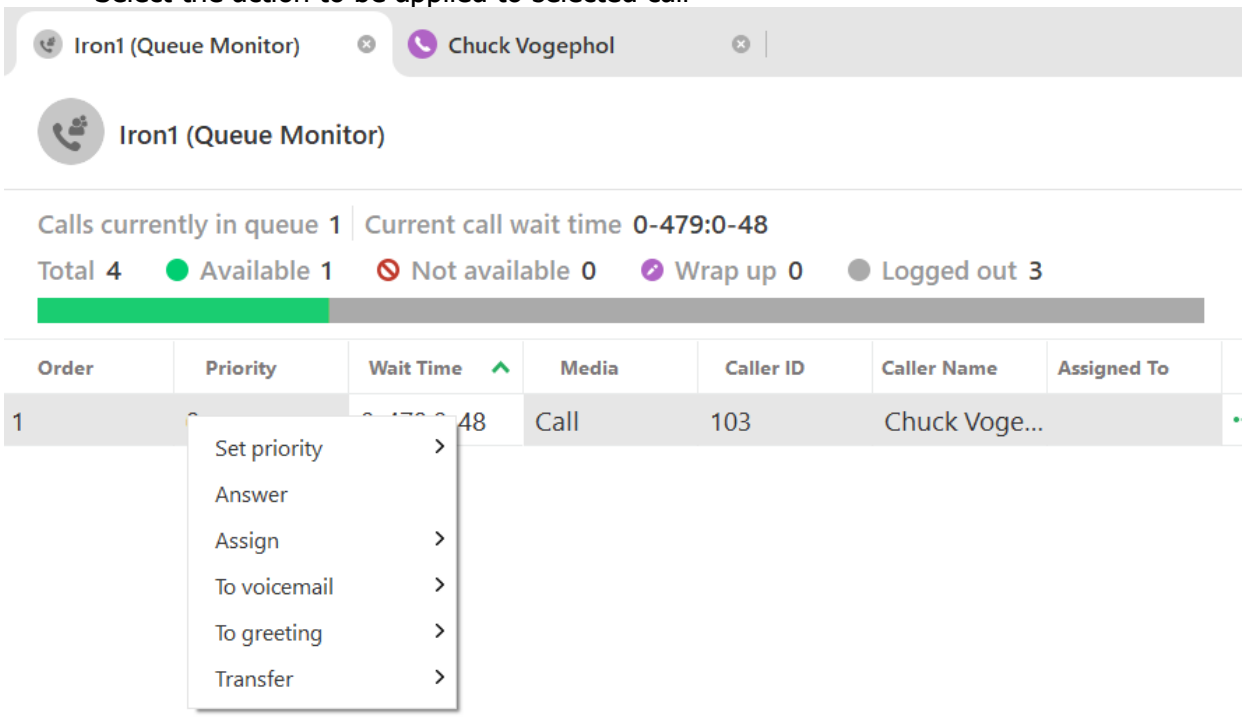
16.5 Queue Monitor Supervisor Commands

16.5.1 Description

This feature allows supervisor functions for calls in queue to be performed directly from Queue Monitor screen. Supervisors of ICC groups may now access these options directly from the ZAC Queue Monitor.

16.5.2 Operation

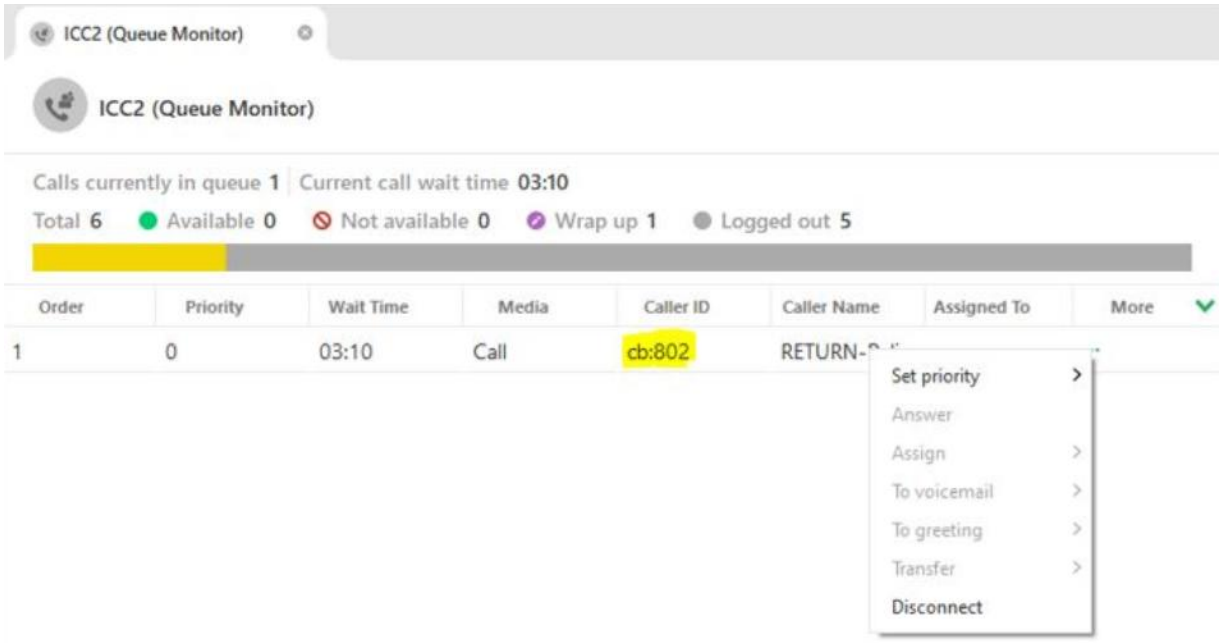
- Select call-in-queue
- Select the action to be applied to selected call



Note: For Automatic Call Back calls-in-queue, only the listed below options are available:

- Set Priority

- Disconnect



16.5.3 Conditions

- This functionality is only available to Supervisors of an ICC group.

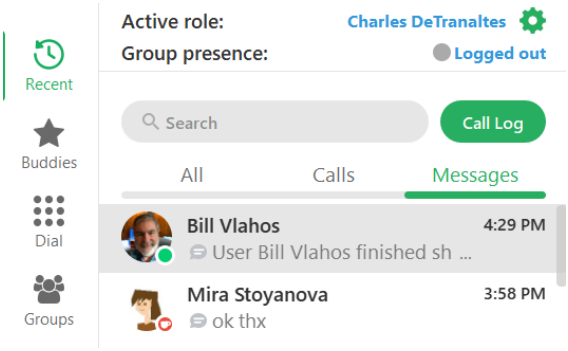
16.6 Recent Screen Improvements

16.6.1 Description

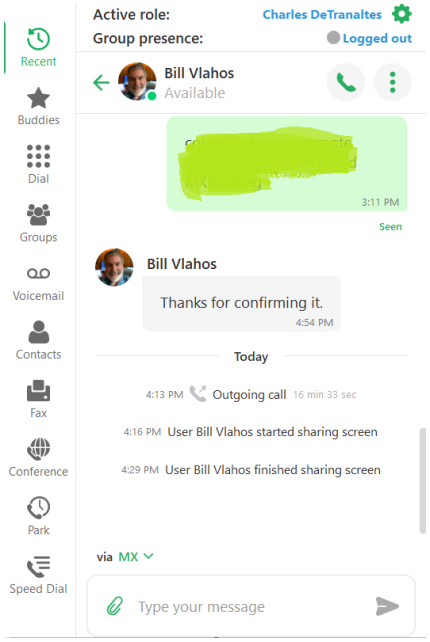
The Recent screen has been improved to include Avatars, user presence, user typing and draft functions.

16.6.2 Operation

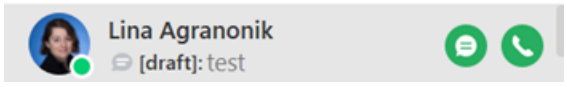
- Avatars and presence in the Recent list:



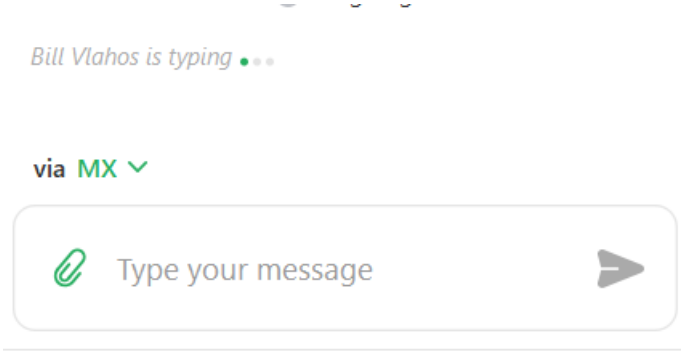
- Avatars and presence in the Recent list when engaged in a chat:



- Draft status displayed in a chat:



- User typing indication in a chat:



16.6.3 Conditions

- If there is a draft for a particular chat, the draft chat will appear at the top of the Recent list.
- Draft content is maintained on a ZAC re-login.

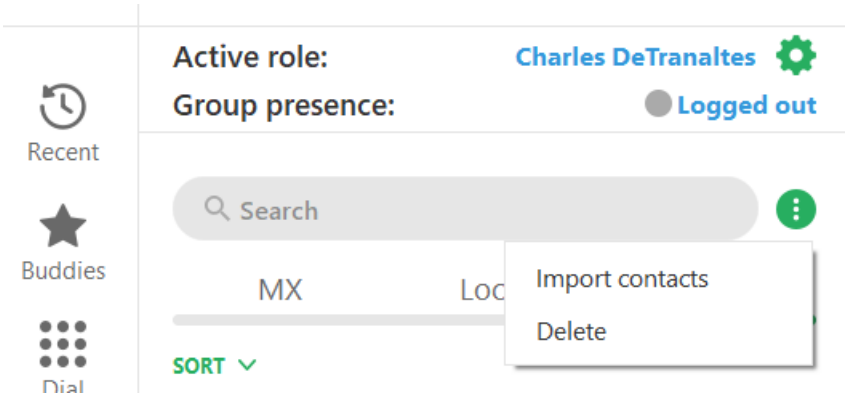
16.7 MXIE Contact Import

16.7.1 Description

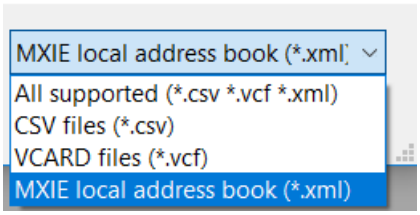
This feature allows ZAC users to import their MXIE local address book contacts. Contacts display in the Imported tab of the Contacts area.

16.7.2 Operation

- Navigate to Contacts>Imported.
- Click the more icon.



- Click Import contacts.
- Select the MXIE local address book file type.
- Use the File explorer to navigate to where the local contacts are stored.



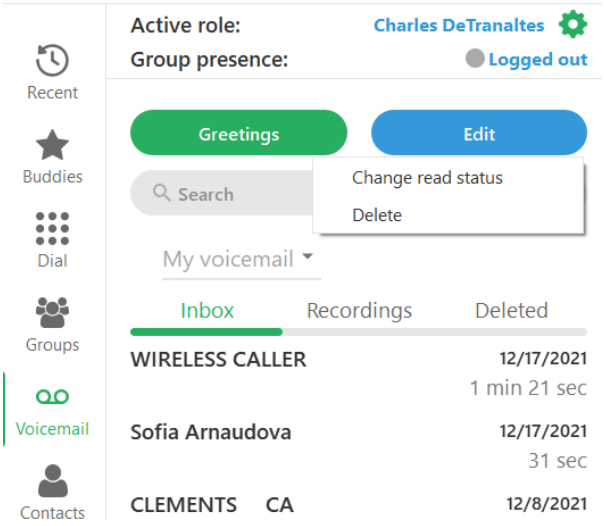
16.8 Read Status improvements of voicemail and call recordings

16.8.1 Description

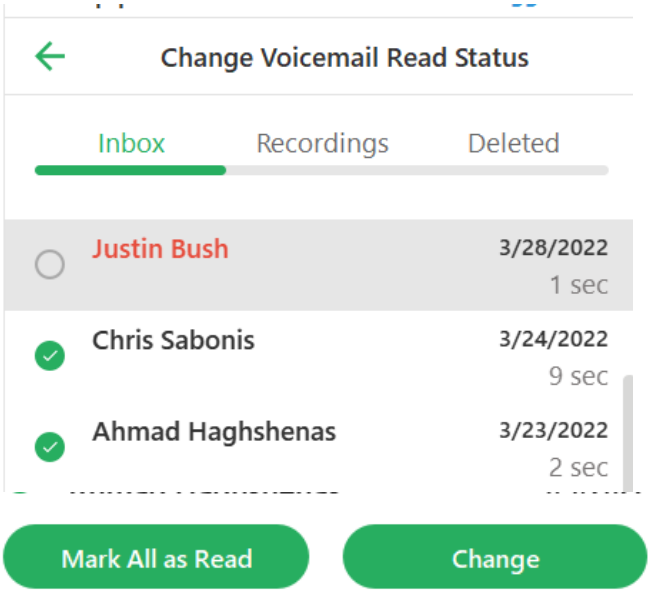
This feature allows the user to change the read status of voicemail and call recordings in a bulk fashion. Users can now change the read status of multiple or all message types.

16.8.2 Operation

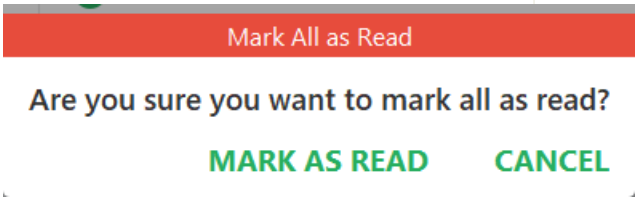
- From the Voicemail menu click the Edit button:



- Click the Change read status item:



- Click Mark All as Read:

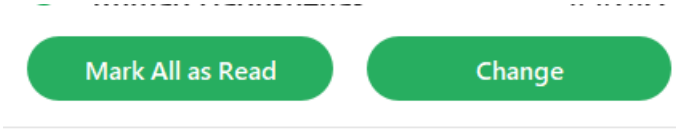


- Confirm the selection

You may also select/unselect individual messages to change the status.

- Check/uncheck the messages to change the status of:

- Click the Change button:



16.8.3 Conditions

16.9 Conference Accept/Reject Status

16.9.1 Description

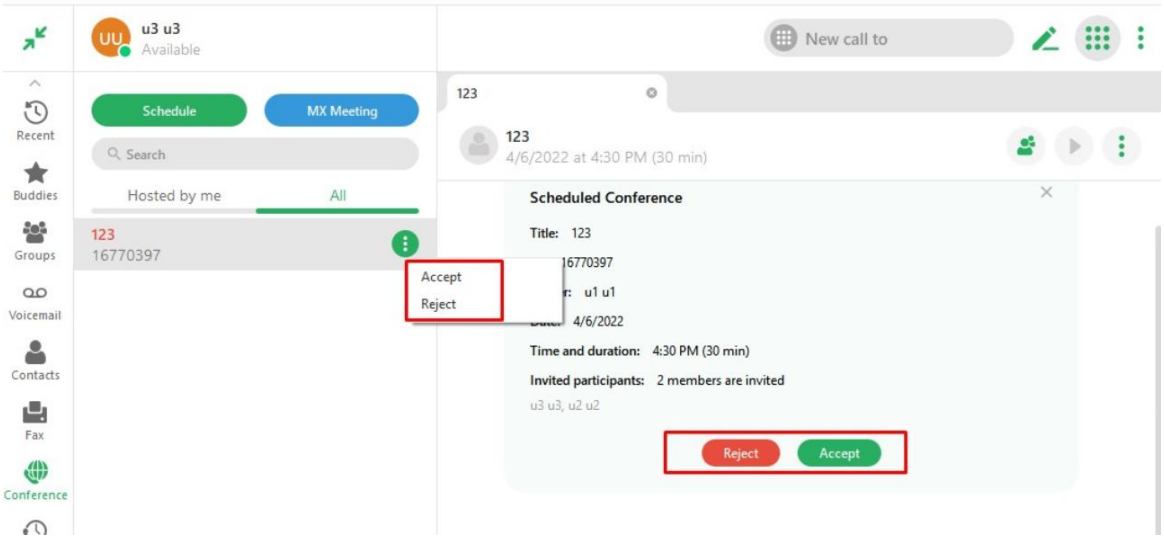
This feature allows conference participants to accept or reject a conference invitation. In addition, the conference owner may re-invite participants who initially rejected the conference once the conference has started.

16.9.2 Operation

Conference Participants:

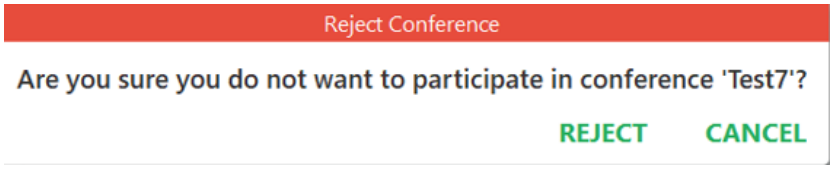
Internal participants who receive a conference invitation may click on the invitation to display the conference information.

The participant may select to Accept or Reject the conference invitation.



If the participant accepts the invitation, the conference is added to their calendar and they will receive the notification icon prior to the conference start time.

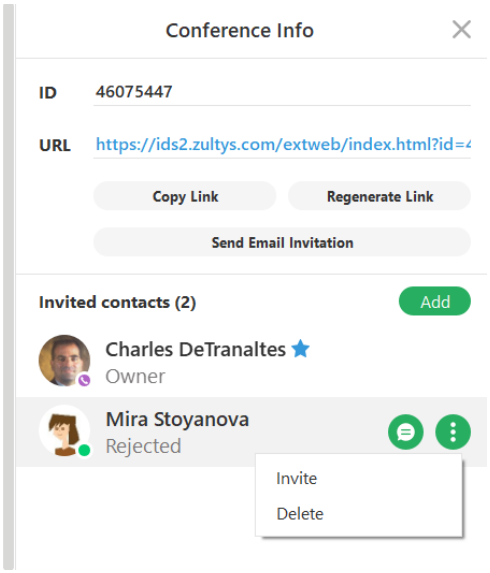
If the participant rejects the invitation, they will be prompted with a confirmation dialog:



Clicking Reject will delete the invitation, and no calendar invite is added. The user will not receive any notification when the conference starts.

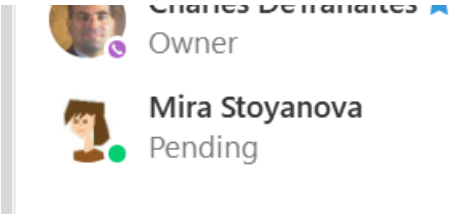
Conference Host:

Once the host starts the conference, they may navigate to the Info screen to view the participants and their status:

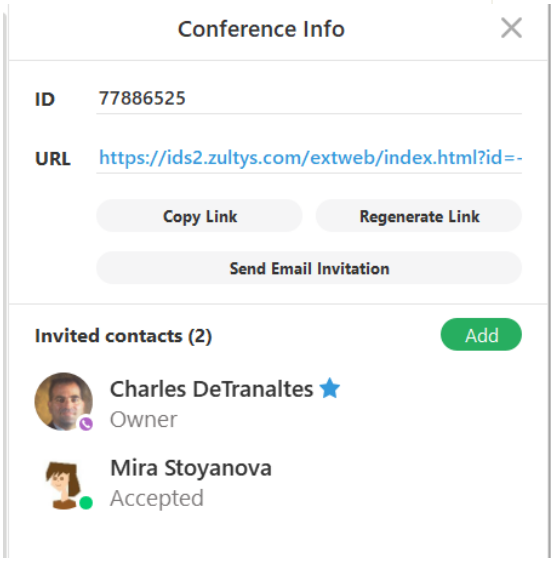


The host may invite participants who rejected the conference invitation. They do this by selecting the More icon and then selecting Invite.

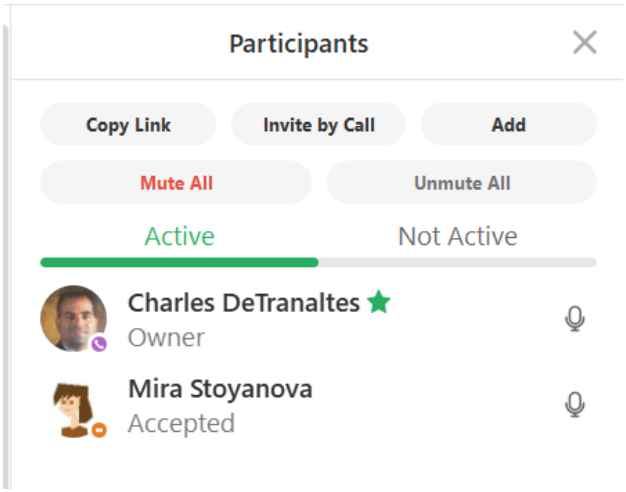
The user status will change form Rejected to Pending:



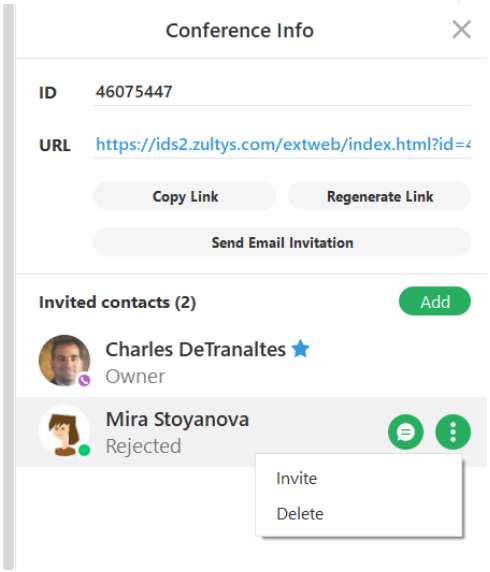
Once the participant Accepts the invitation, the Info screen changes to reflect the new status:



When the participant joins the conference the Participants tab will reflect their status as Active.

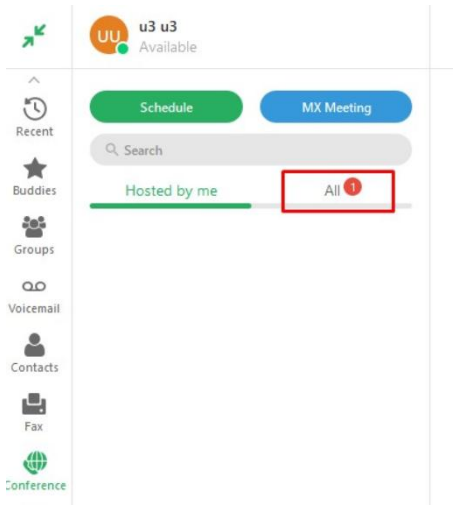


The host may also delete the participant who rejected the invitation by clicking on the Delete option. This will remove the participant from the Info screen.



16.9.3 Conditions

- Conferences with a "pending" status will be shown on the top of conferences list in the All tab. These conferences will also be marked with a "red" color.



16.10 Search Functions

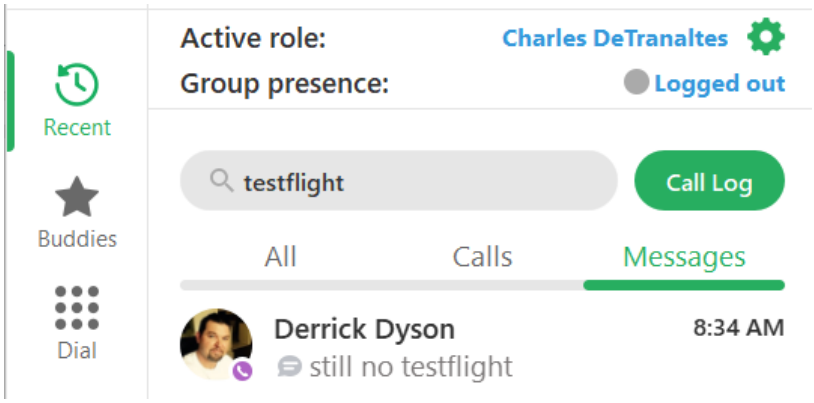
16.10.1 Description

Multiple areas of ZAC include new search functionality. Users may locate information by performing a search function. This search function is incorporated into the Recent, Voicemail, and Fax menu areas.

16.10.2 Operation

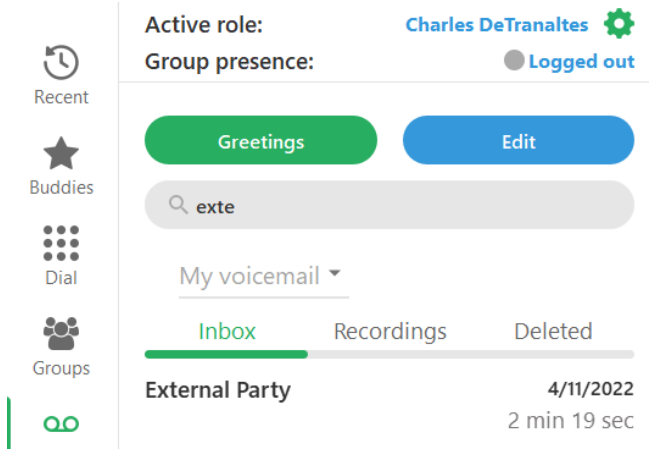
Recent>All, Calls or Messages

- Enter the desired text to search for in the search bar. All matching text will be presented.



Voicemail>Inbox

- Enter the desired text to search for in the search bar. All matching voicemail messages will be presented.



17 ZAC 8.4 Features

17.1 Full screen mode improvements

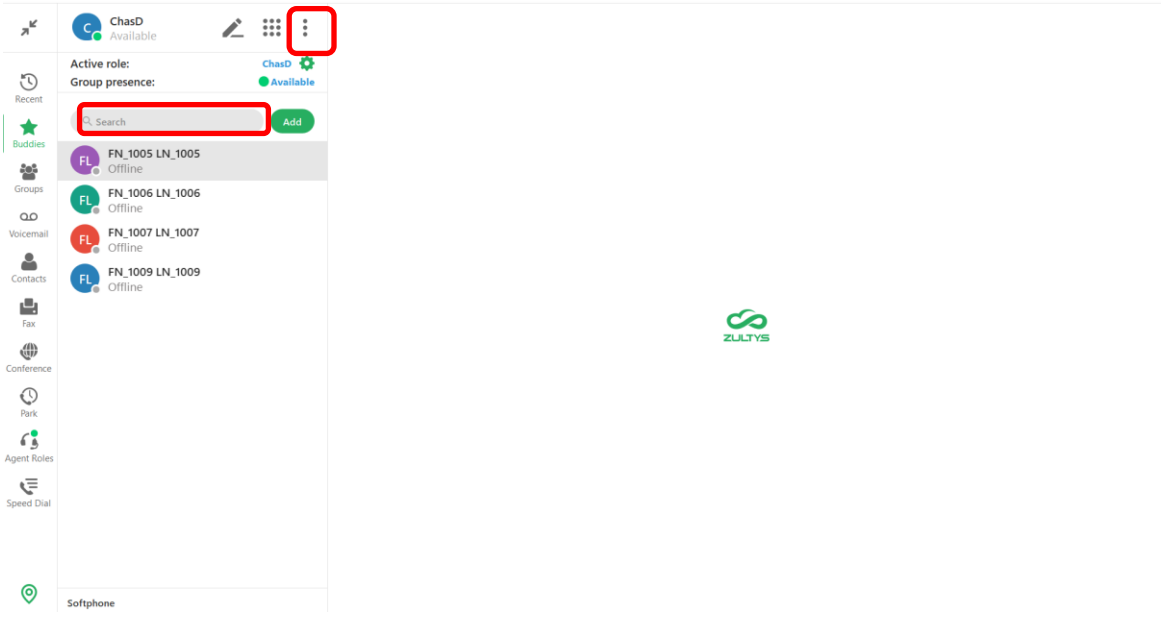
17.1.1 Description

ZAC 8.4 includes numerous improvements when the user is in the full screen mode. Improvements in control location, screen size, tab management as well as other improvements were added to full mode operation. The improvements make application activities (answer calls, messages, etc.) easier without having to explicitly switch tabs. Improvements also allow the user to maximize the screen area when using collaborative functions like screen sharing, video conferencing.

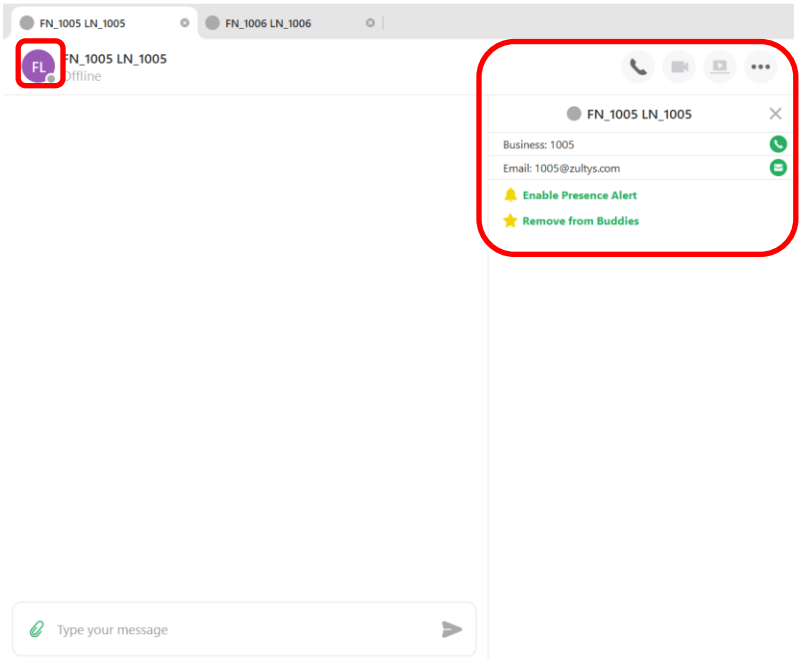
17.2 Operational Improvements

17.2.1 General

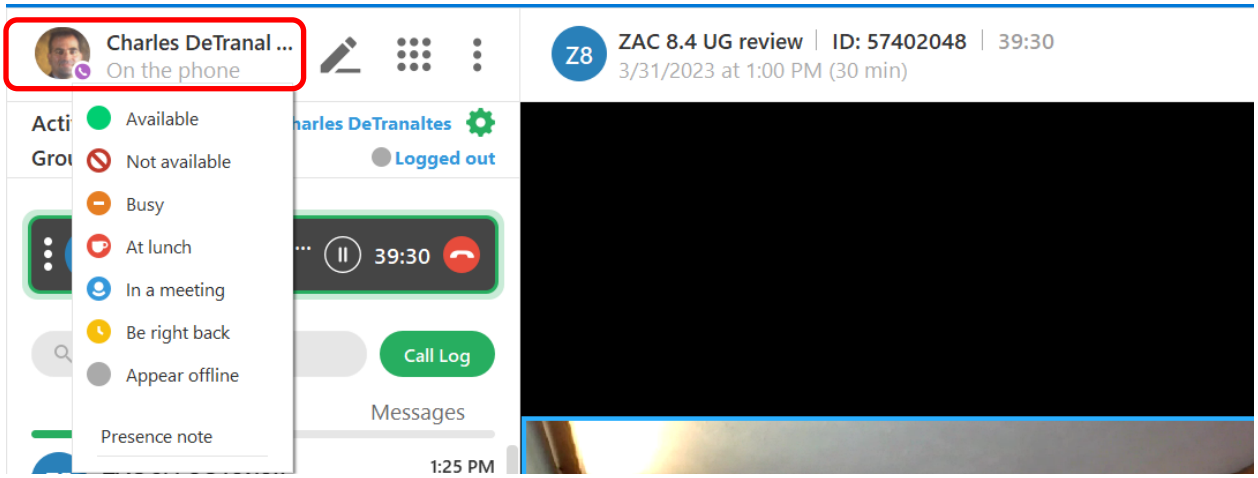
- The top level More button menu ⋮ (About, Settings, Logout and Exit options) has been moved to the Avatar/presence part of the screen. The button remains in this location throughout compact/full mode changes.
- Quick search is moved to the Avatar/presence part of the screen and remains constant there.



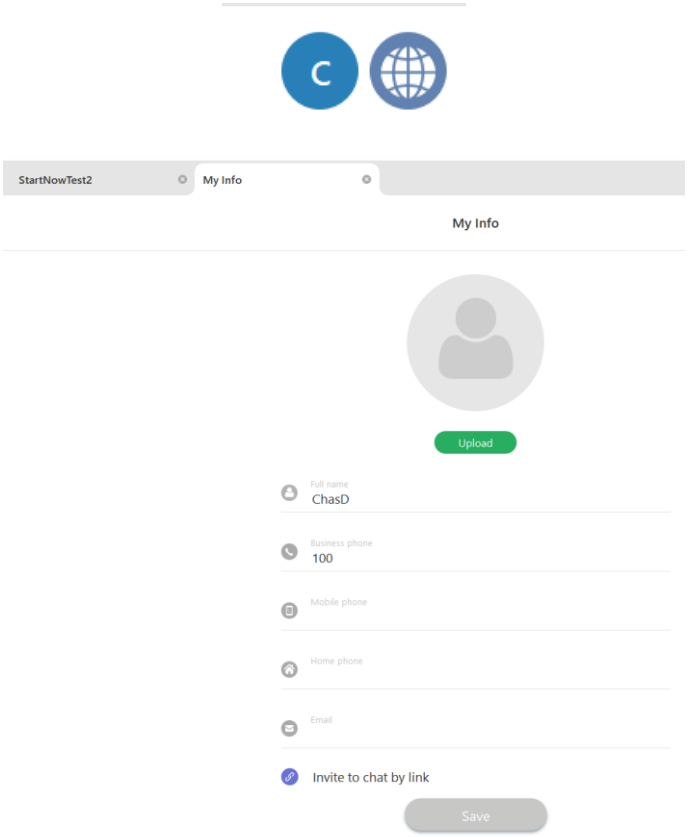
- Clicking an Avatar of an internal user will display the user's information and quick action tools.



- Presence can be changed when in tabbed mode on an active call or conference.



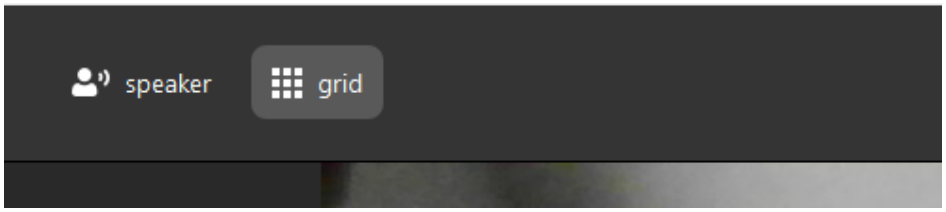
- Clicking on a user avatar will display the information tab for the user (internal user)



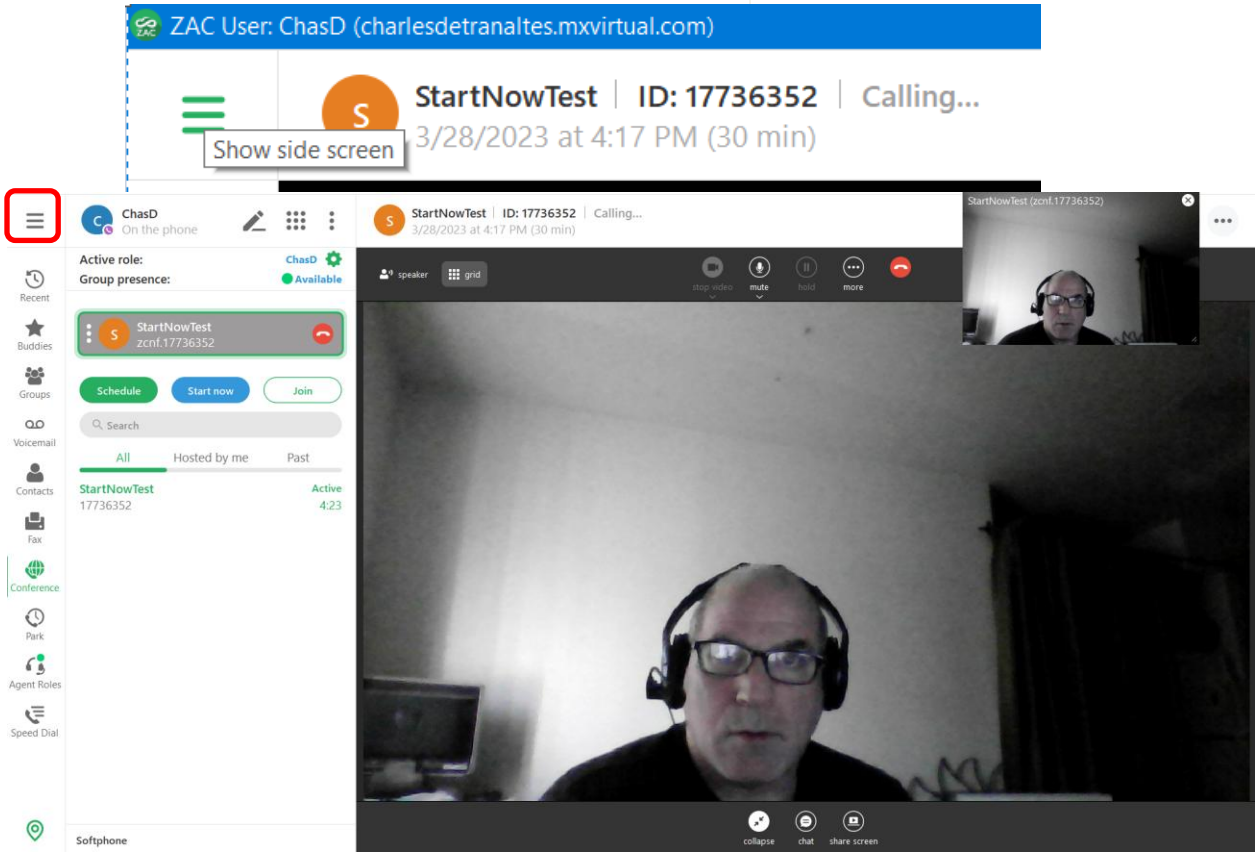
17.2.2 Conference:

There were numerous improvements when utilizing the Conference feature. The improvements were designed to maximize screen space and make utilizing collaboration tools easier.

- Grid mode is set by default for video conferences. The last mode (Speaker or Grid) utilized by the user is now retained.



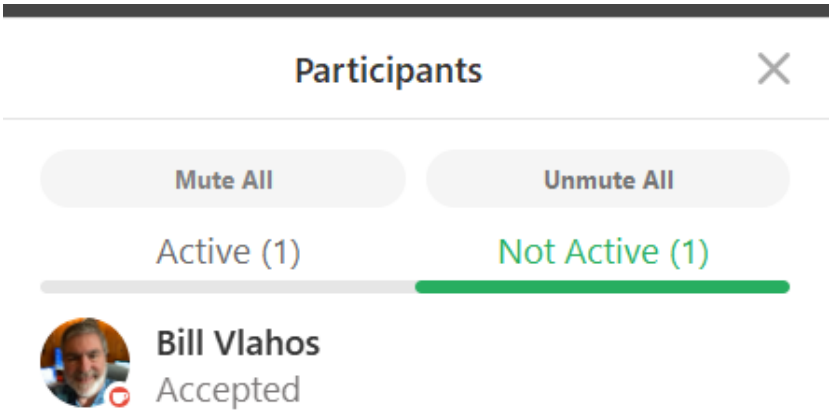
- Show/hide side screen – This option allows you to minimize the side screen to view more collaboration space and remove the left call/information screen.



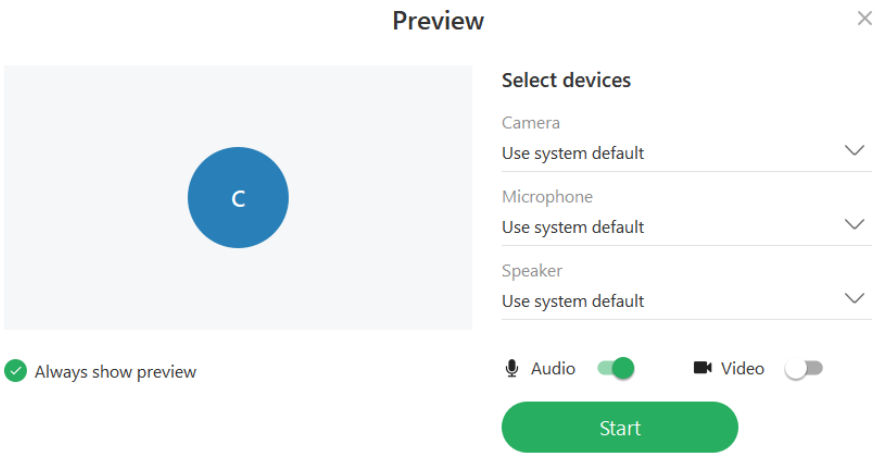
After clicking the button, the viewing space is maximized.

Click the show/hide side screen icon again to restore the side screen.

- Participant status displayed in the participants header.

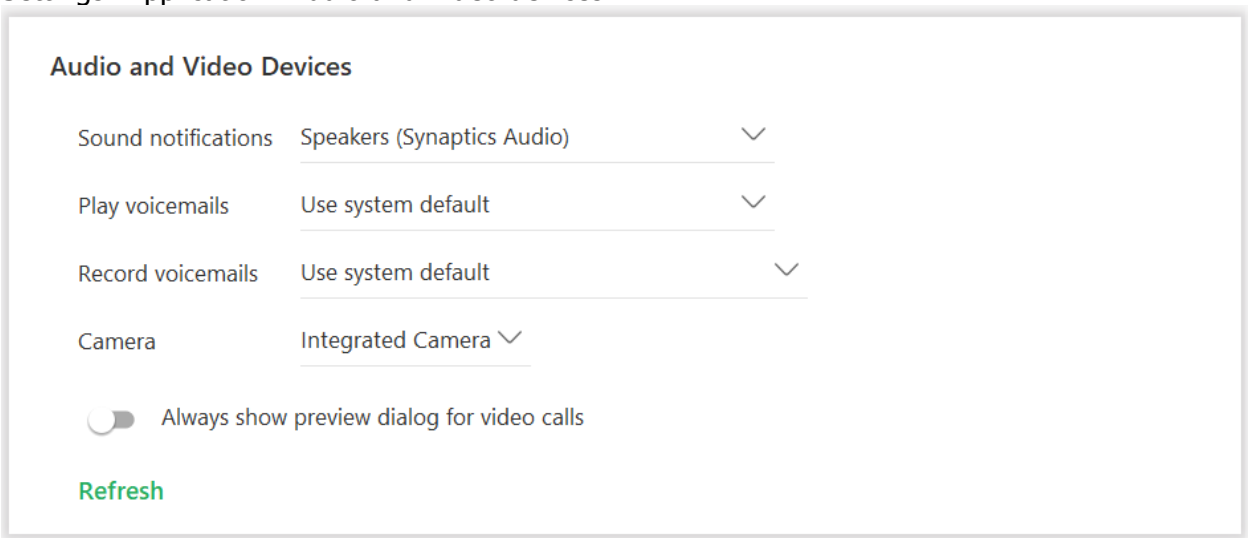


- Conference Preview window. This feature allows you to select audio and video devices prior to joining a conference.

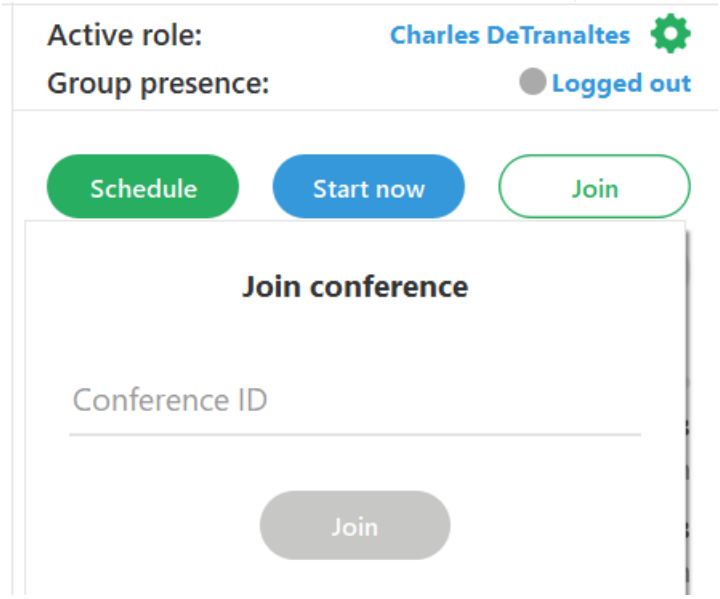


If the user disables Always show preview they can restore the functionality:

Settings>Application>Audio and Video devices>

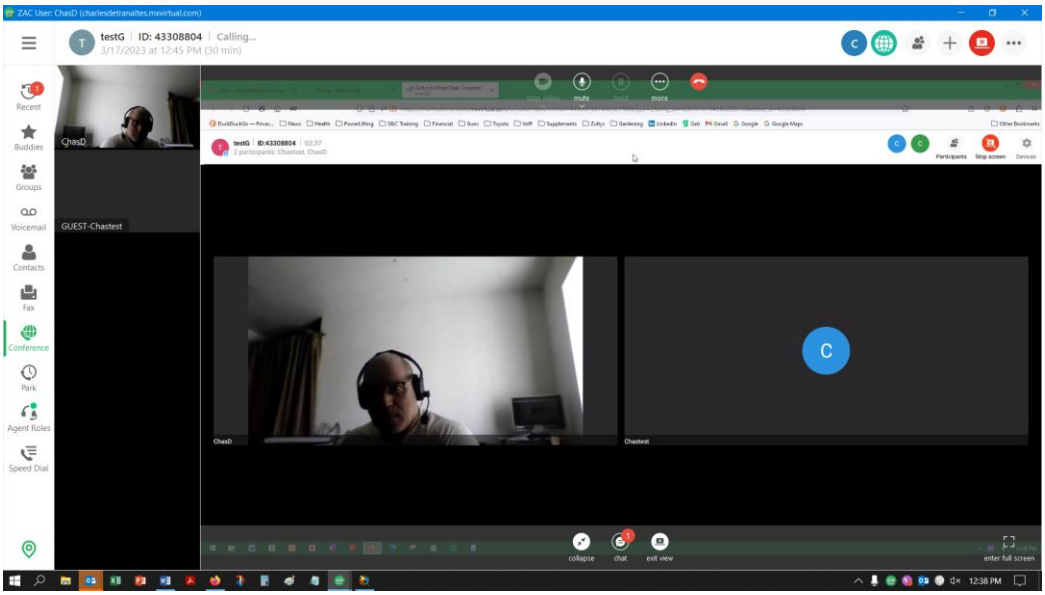


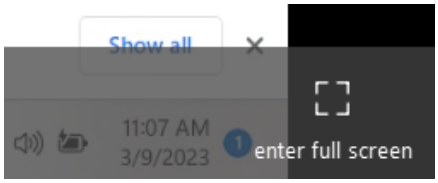
- Join conference by conference ID. This feature allows a user to join a conference simply by entering the conference ID.



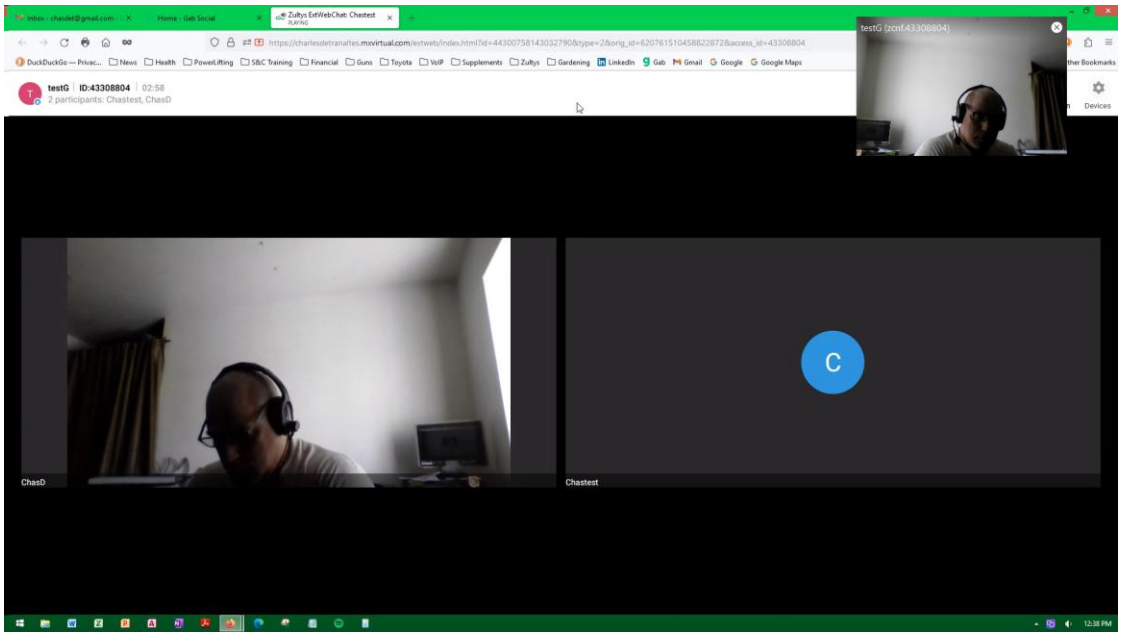
- Screen share full mode. A user viewing another user's screen may maximize the viewing window by the use of the full screen mode.

Click the enter full screen mode icon in the lower right corner during a screen share.





The window will expand to full screen mode:

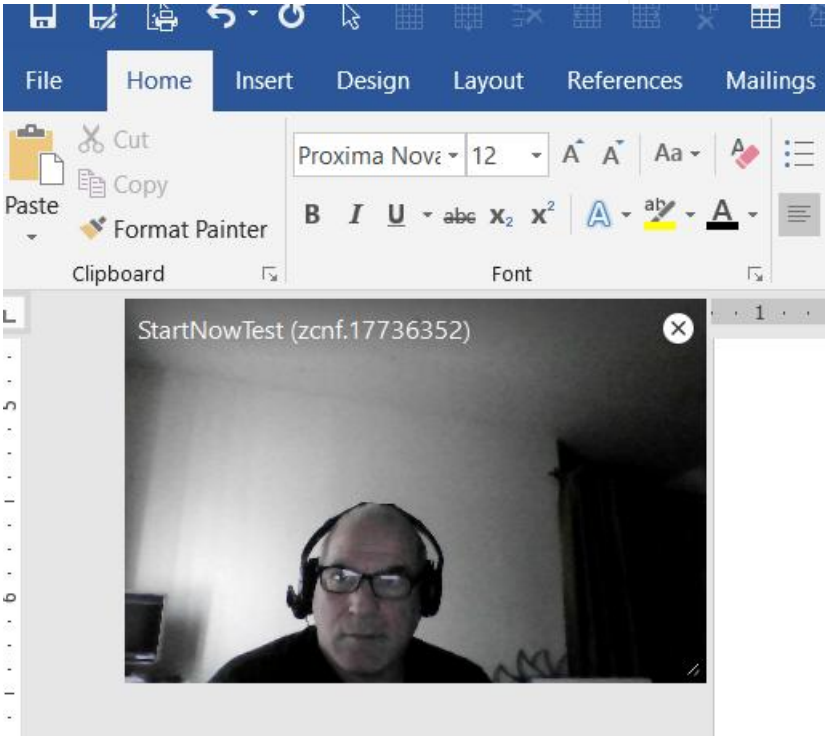


Click the exit full screen mode in the lower right corner to exit the full screen mode.

- Floating conference window. This feature allows a user that navigates away from their video conference to have a window that allows them to monitor the conference. They can also use the window to re-join the conference.

While on a conference call:

- Click outside the ZAC screen.
- You will see the selected screen as well as the floating conference window.
- You may move the window to any location on the screen.
- Double click the window to rejoin the conference.



Example: User in a video conference that clicked on the Word application. The floating window for the conference appears.

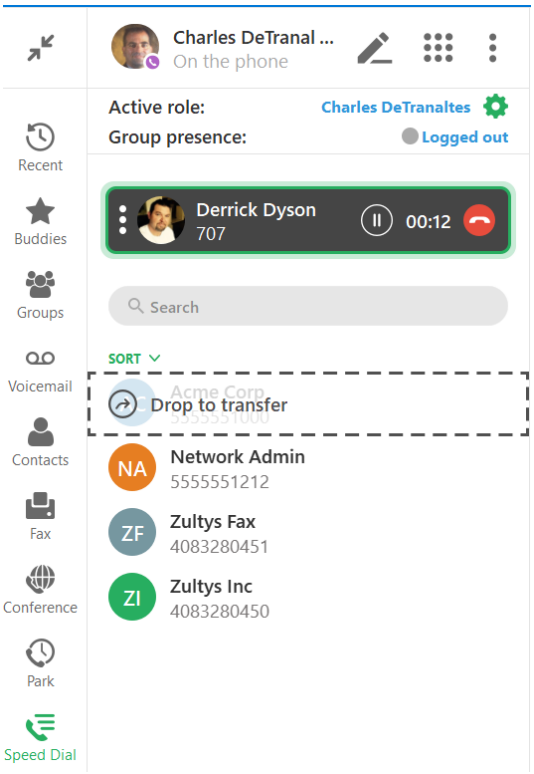
17.3 Drag and Drop call to a speed dial

17.3.1 Description

This feature allows a user on a call to perform a unattended transfer to a speed dial location by drag and drop operation.

17.3.2 Operation

- Click and hold the call session window.
- Drag the window to the speed Dial area. The area will expand.
- Drag the window to the desired speed dial entry and release the mouse.



17.4 Start Now Conference

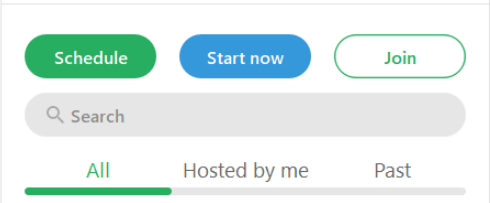
17.4.1 Description

This new conference type provides a user with a conference that can be started immediately. In addition to an immediate start, the organizer can invite participants via ZAC and/or e-mail invitations.

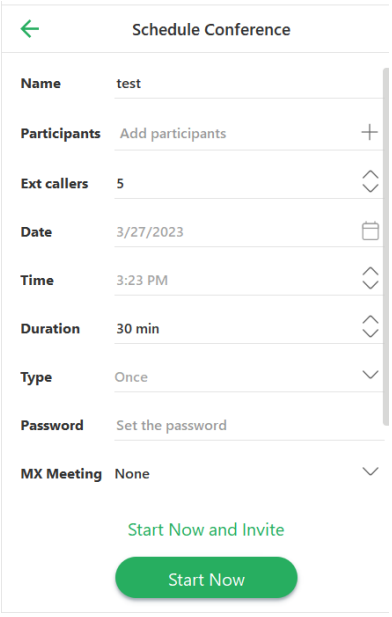
17.4.2 Operation

In the conference area:

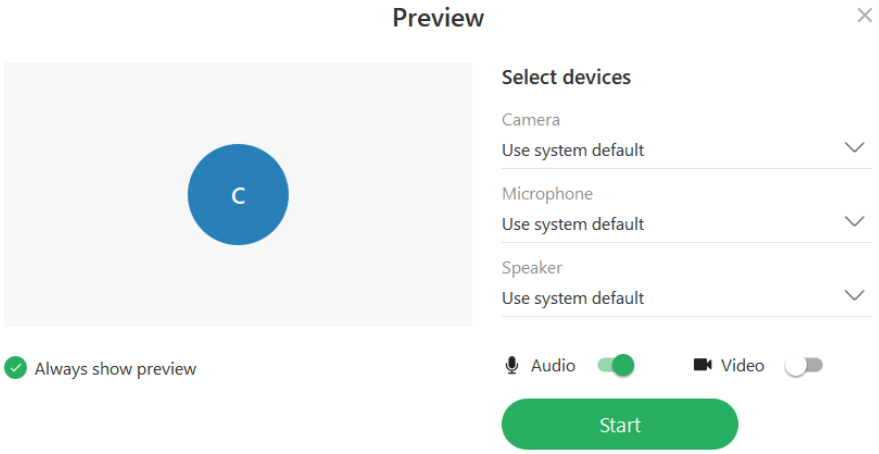
- Click start now



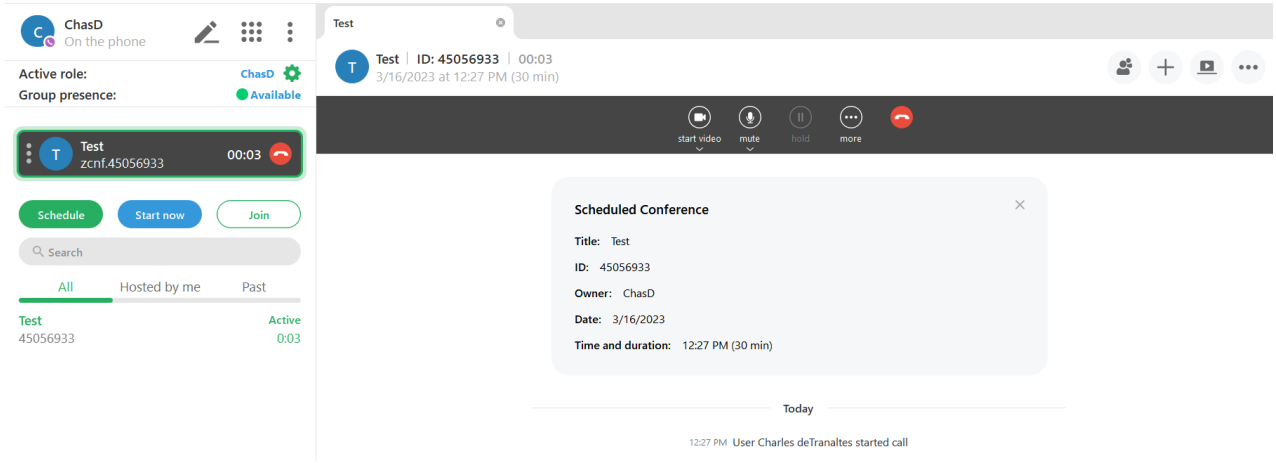
- Fill out the fields for name-internal participants-number of external callers-duration-password-MXmeeting-end call on host leave.



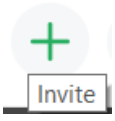
- Click either Start Now or Start Now and Invite
- Clicking Start Now will present the conference Preview window. Select the audio/video devices that will be used for the conference.



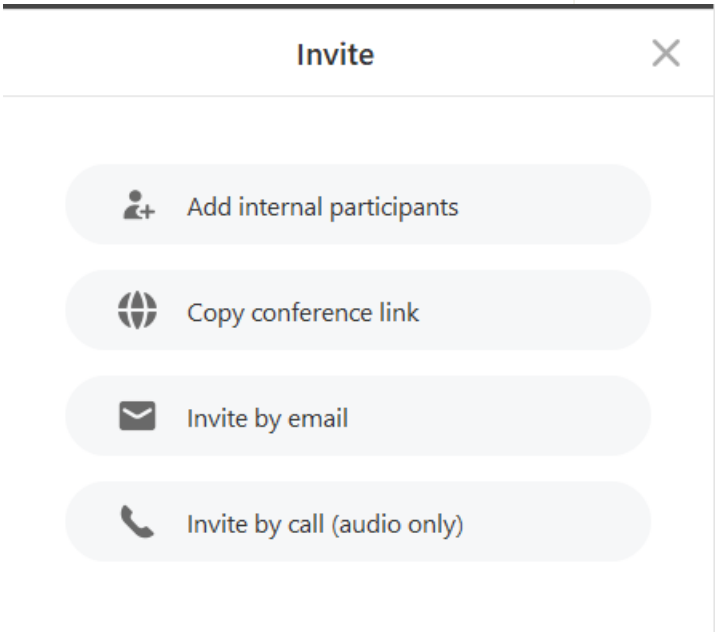
- The main conference screen will appear after starting the conference:



- To invite users to the conference after starting the conference:



- Click invite icon in toolbar
- Choose user types to invite:


Invite
Add internal participants
Copy conference link
Invite by email
Invite by call (audio only)

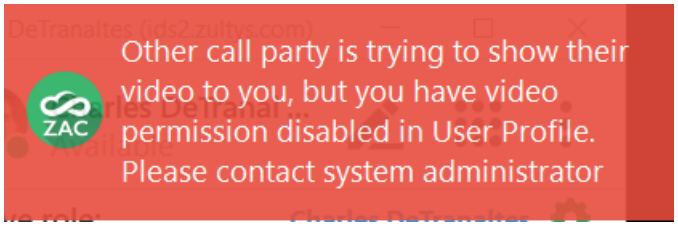
17.5 Video Warning

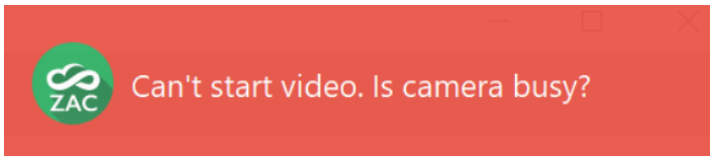
17.5.1 Description

This feature provides a pop up message that indicate a user is not configured for video services.

17.5.2 Operation

A user that attempts to utilize video services that is not configured will receive a pop up message indicating video is not available.





Pop up messages are also provided for a user to user video call

Pop up message is displayed for a camera busy condition

Click on the message to extinguish.

17.5.3 Conditions

- Video is configured in the User Profile section of MX Administrator.

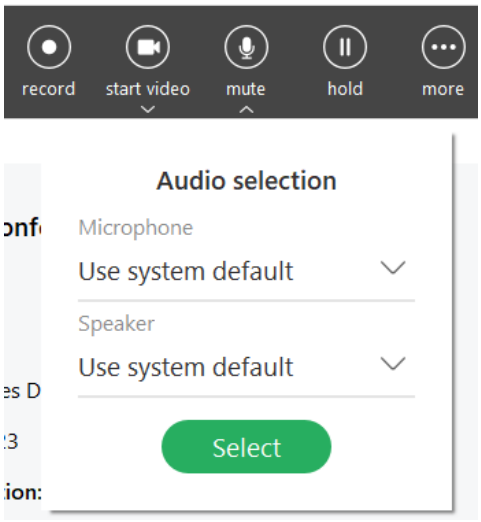
17.6 Audio and Video device selection while on a call

17.6.1 Description

This feature allows a softphone user involved on a call or conference to select/change their audio device while on the call.

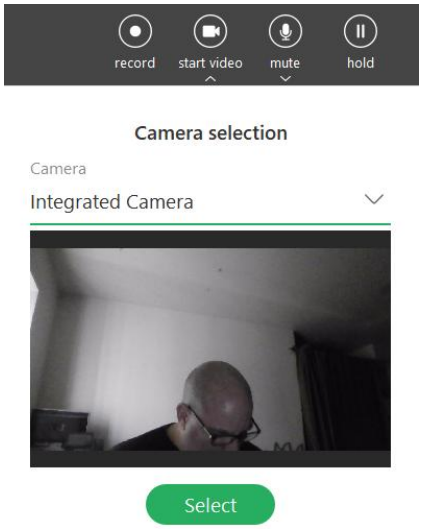
17.6.2 Audio Operation

- Click the arrow at the bottom of the mute icon.
- Select the audio device to be utilized.
- Click Select.



17.6.3 Video Device Operation

- Click the arrow at the bottom of the start video icon.
- Select the video device to be utilized.
- Click Select.



17.6.4 Conditions

- User must be bound to the softphone for the audio functionality to appear.

17.7 Presence note for Agent role

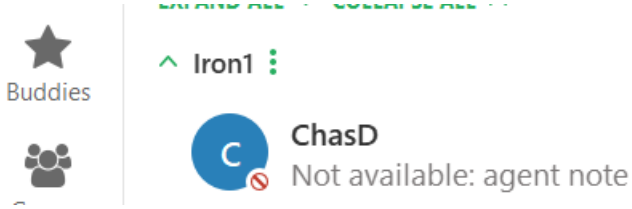
17.7.1 Description

Supervisors and agents will now see both an agents current presence status and any notes they have added when they are in the Agent Role screen.

17.7.2 Operation

Once the agent has set a presence and their note, the setting will display as:

Agent Role screen:



18ZAC 9.0 Features

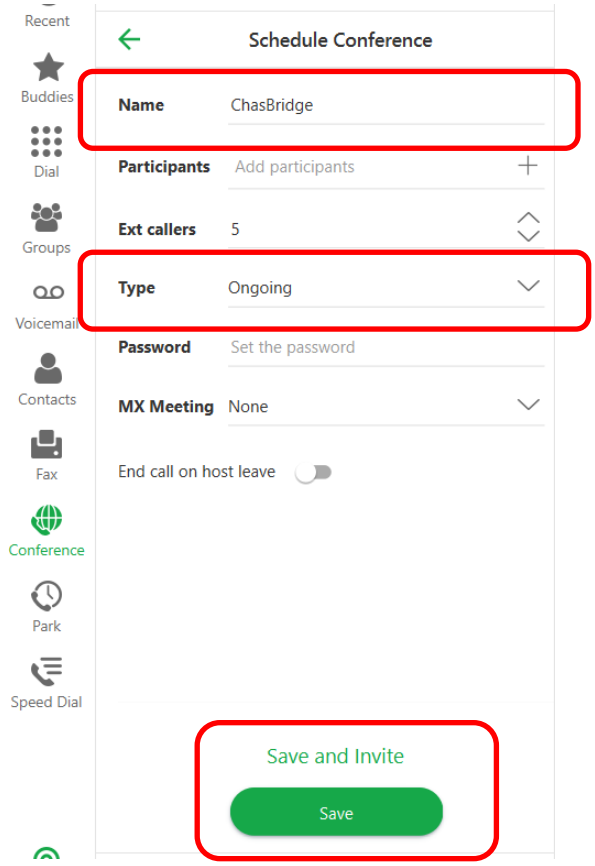
This section describes the new features that are introduced with ZAC version 9. Please note that some of the features described here only function when ZAC 9 is connected to MX systems that are Release 18.0.3 or greater.

18.1 Ongoing Conference

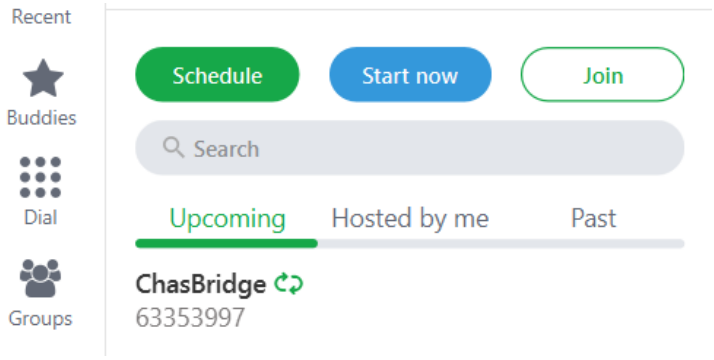
The ongoing conference type provides a conference bridge that has a persistent conference ID. This conference type can be used as a "personal" conference bridge.

18.1.1 Operation

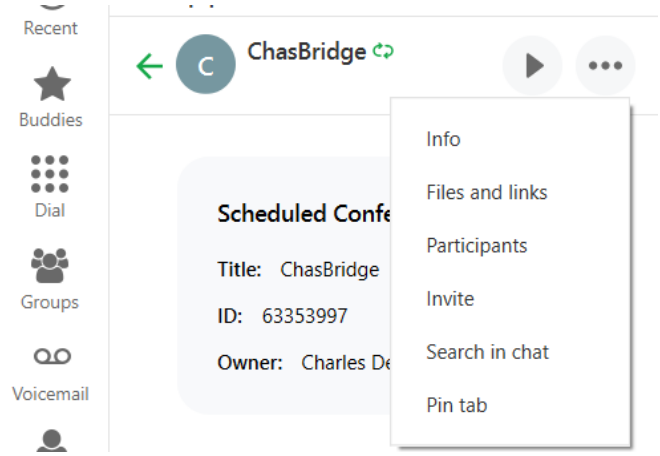
To configure an Ongoing type conference:



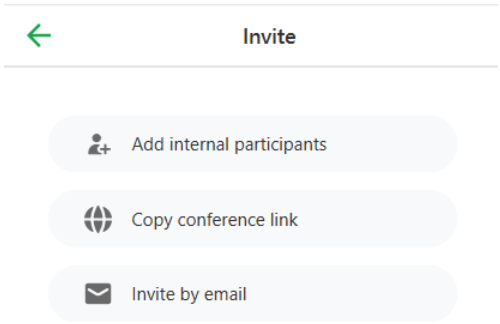
Once configured, the conference will display in the conference list area.



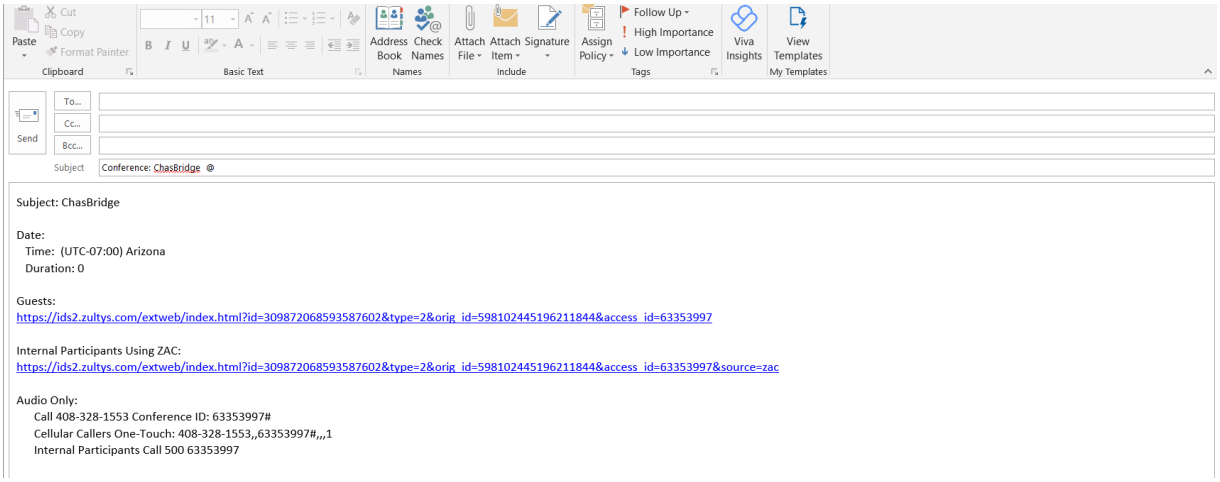
Clicking the conference will display the Options icon:



- Invite
  Click invite to display the invitation options for the ongoing conference type.



- Invite by email: (Schedule function)
  This will generate an email invitation with the ongoing conference bridge link for both internal and Guest users.

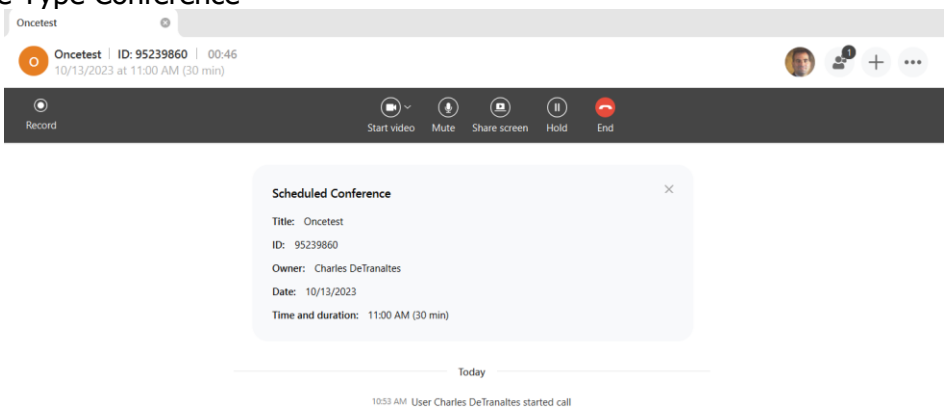


18.2 Conference improvements

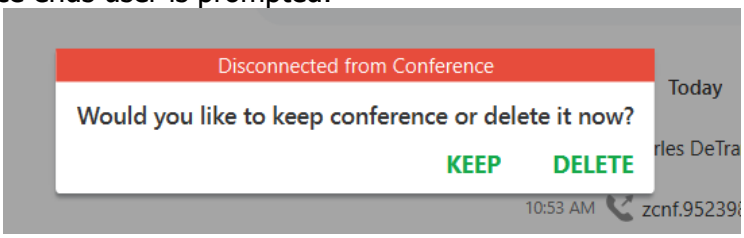
18.2.1 One time conference improvement

One time conference types now prompt the user to keep the conference information when it ends. This allows the user to keep the conference for future reference including all chat and files.

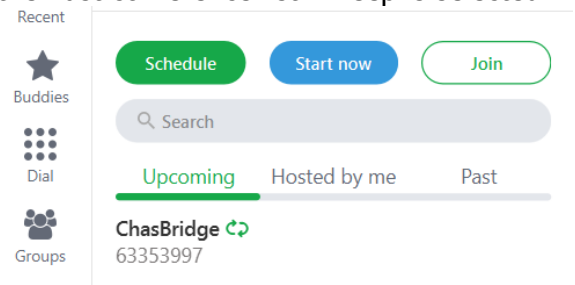
- Once Type Conference



When the conference ends user is prompted:



Conference will display in the Past conference list if Keep is selected:

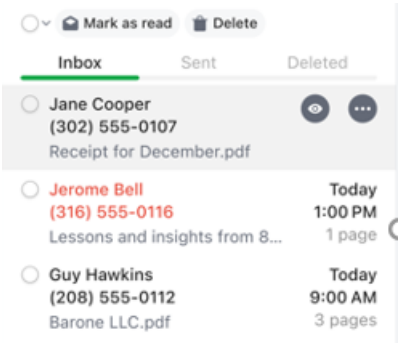


18.3 Voicemail/Fax Improvements

Several areas in the Voicemail menu were enhanced or new functionality was added for improved user functionality.

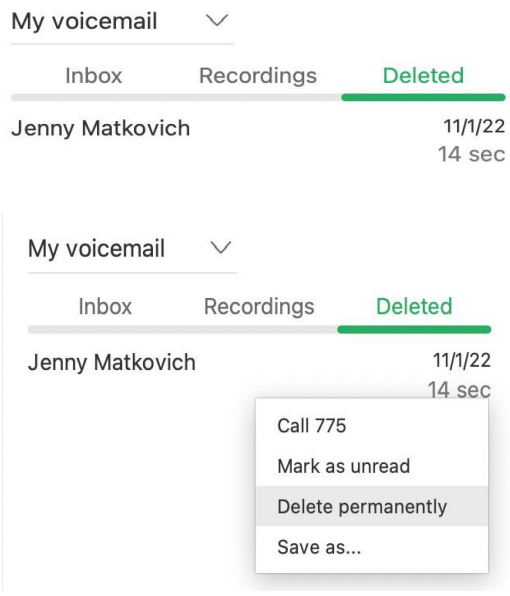
18.3.1 Voicemail/Fax CallerID

Both our voicemail and fax interface now show both name and number on two separate lines for better readability.



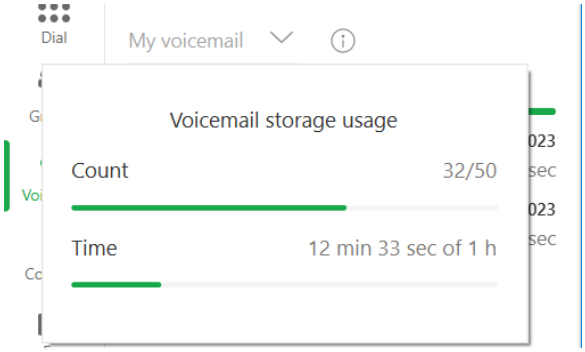
18.3.2 Deleted voicemail folder:

Users can manage their deleted messages in the deleted voicemail folder. This provides access to deleted messages for restore or permanent delete options.



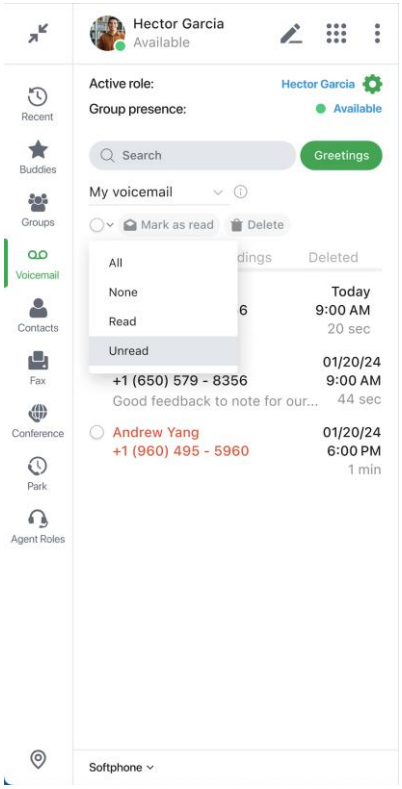
18.3.3 Storage display

Users can now view their mailbox storage time and message count.



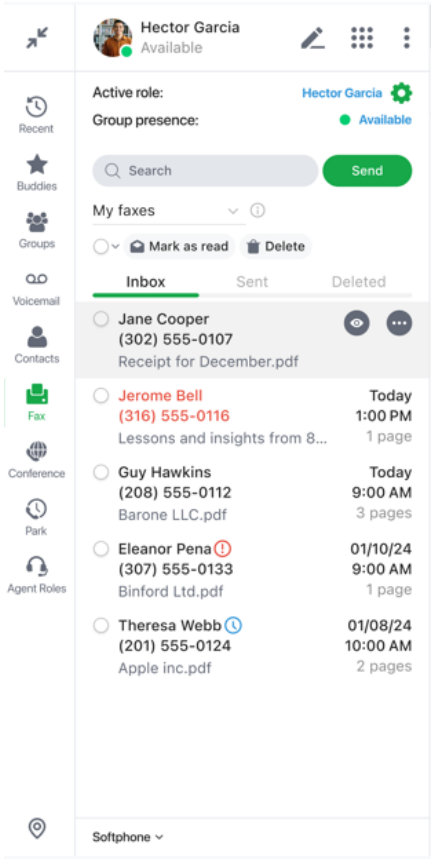
18.3.4 Mark Read/Delete Bulk operation

Users now have enhanced control over their voicemail and faxes, making it easier to manage messages by being able to conveniently select individual, all, all read, or unread items and either mark as read or delete voicemail or faxes.



18.3.5 Fax status indications

New red and blue icons accompanying faxes now provide status updates. indicating whether the fax failed to send (red icon) or if the sending process is currently in progress (blue icon).

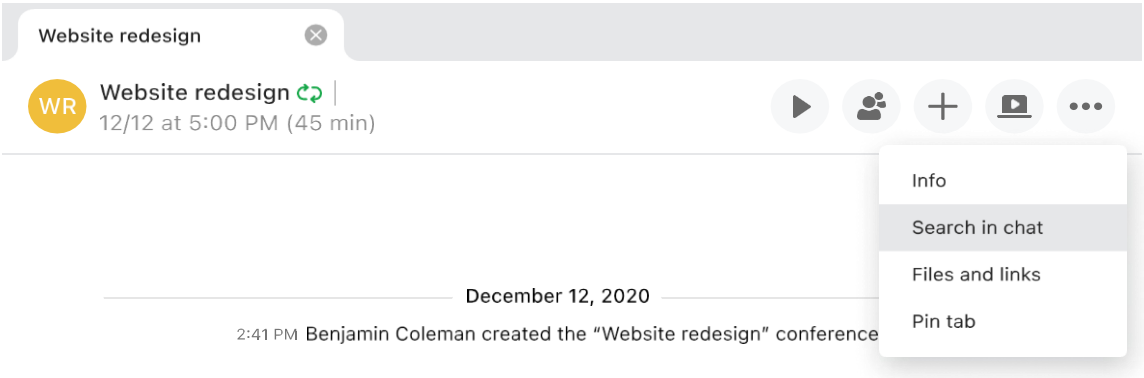


18.4 Chat Improvements

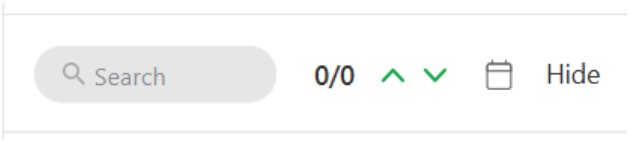
18.4.1 Search Chat

Users can now search for specific keywords, phrases, or even dates, pinpointing the exact information they're looking for. Search results include media, files, and links within their chat conversations.

- Click the More icon:

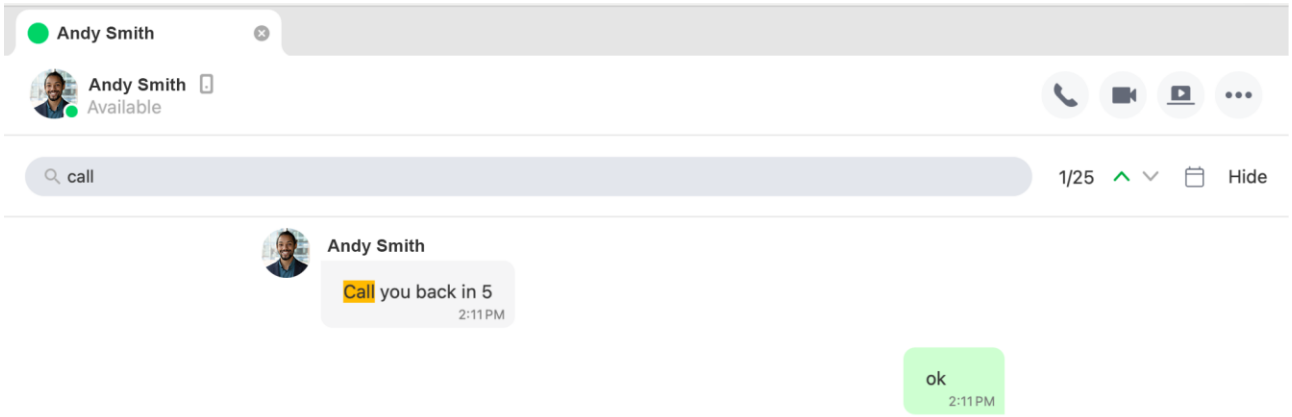


- Click Search in Chat and enter the text you want to search:



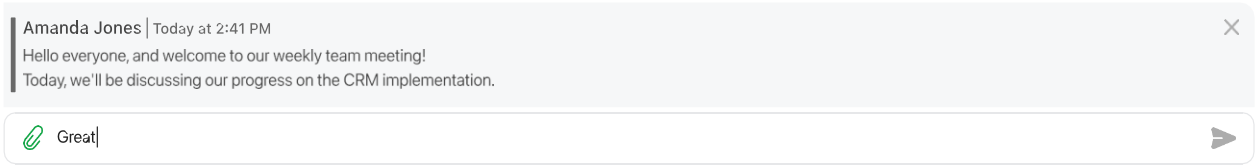
Note: Once you display the search chat window it will remain visible for all chats you access. To hide the search window click Hide.

Users can jump directly to the relevant message within the chat thread using arrows navigation.

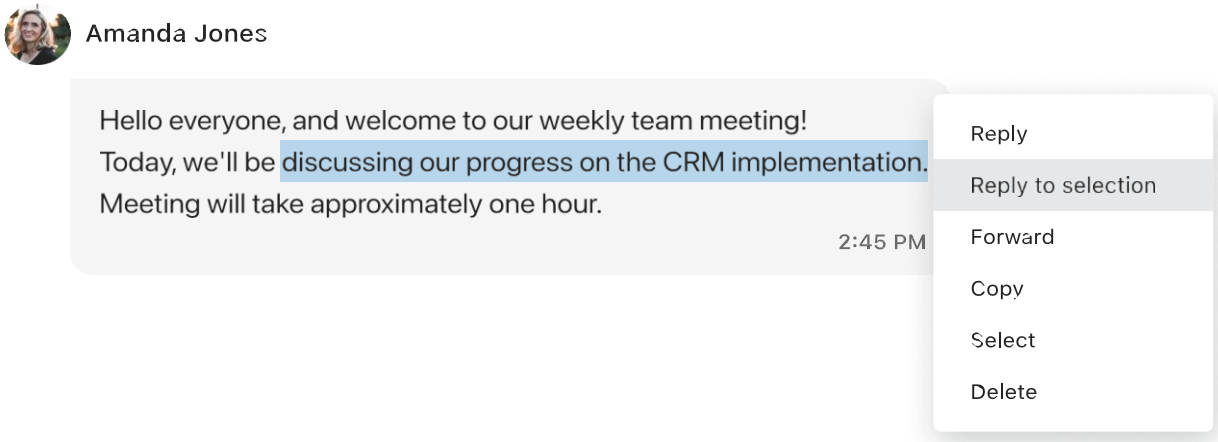


18.4.2 Reply Message

- Right click on a specific message in the thread. Click Reply message



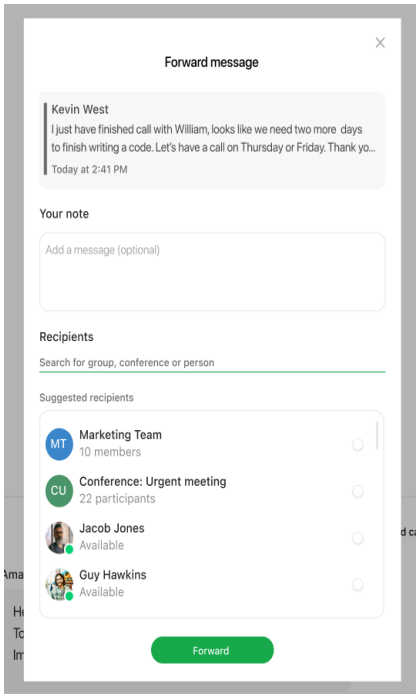
- You can also reply only to a specific selection in a message. Highlight the text, right click, and select Reply to selection to choose this option.



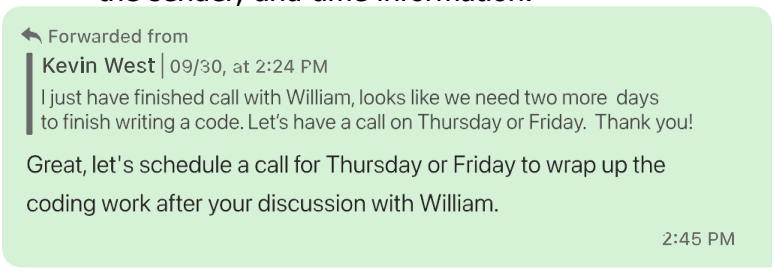
18.4.3 Forward message

A user can forward messages from any conversation in ZAC, including private groups and DMs. If the user is a part of that conversation, clicking on the message will redirect them to the original message.

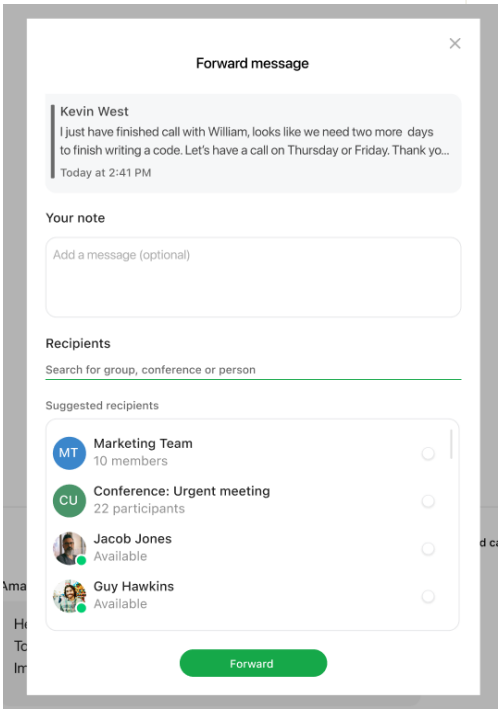
- Right click on the message and select Forward.



- The body of the forwarded message contains the entire original message, a note from the sender, and time information.



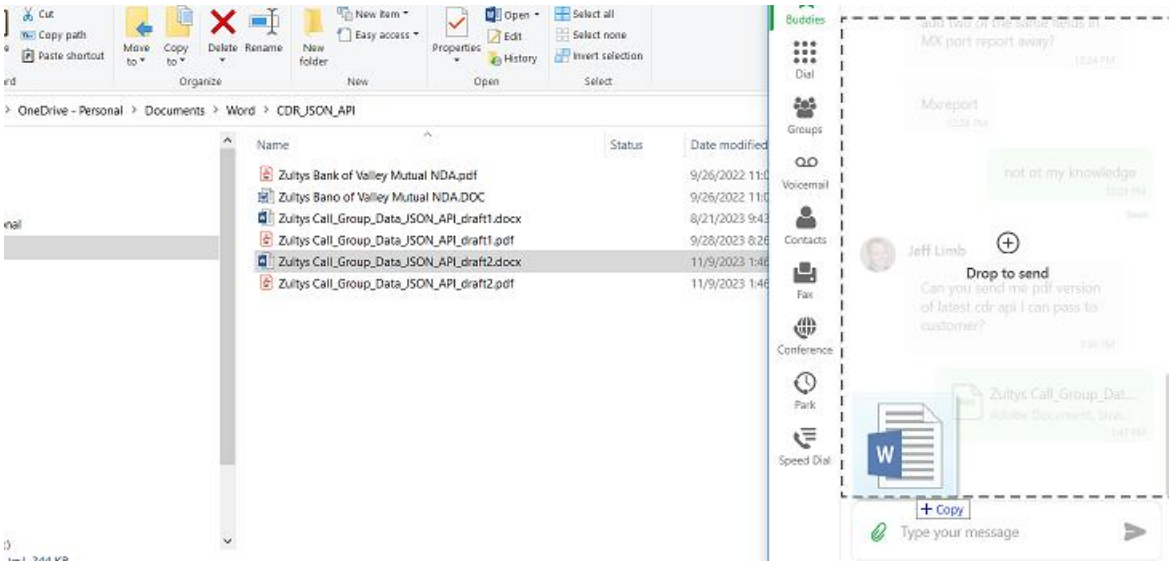
- Select the destination to forward the message to. Destinations can include other users, chat groups, or conferences.



- Click Forward when finished.

18.4.4 Drag drop file

This feature allows the you to drag and drop a file into a chat session. This will share the file to the recipient(s) in the chat session.



18.5 Conference Improvements

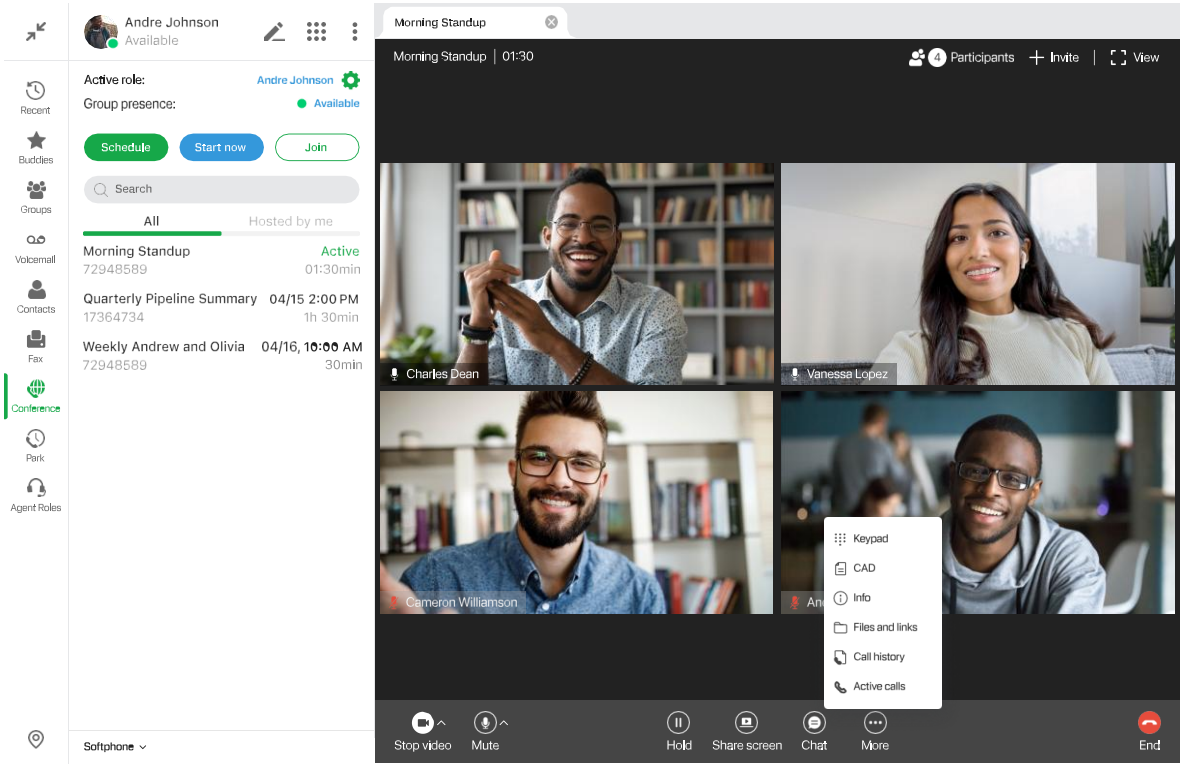
Redesigned call panel for audio and video calls. The new user interface (UI) now features clearer icons and simplified functionality, making it effortless to manage video and audio settings, screen sharing, and participant management

18.5.1 Top Call Panel

- While in a video conference, the top panel displays the group name, timer, list of participants, and invite options. By clicking the View button, users can easily change the video layout according to their preferences.

18.5.2 Bottom call panel

During video conferences, the bottom panel presents navigation buttons for video and audio control, placing the call on hold, sharing the screen, opening the chat panel, and ending the call. The "More" button reveals a personalized list of options based on each user's permissions. The image showcases the complete available list of options.

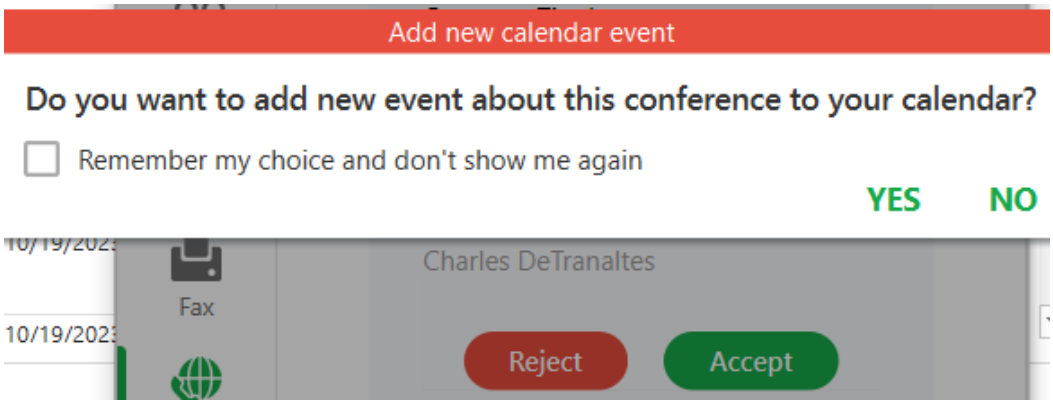


18.5.3 Pagination for video conferences larger than 20

During video mode, when users have more than one screen with participants, they can easily navigate through the screens using either the arrows located on the left and right sides at the bottom or the slideshow bullets at the top.

18.5.4 Internal Invitation - Add to calendar

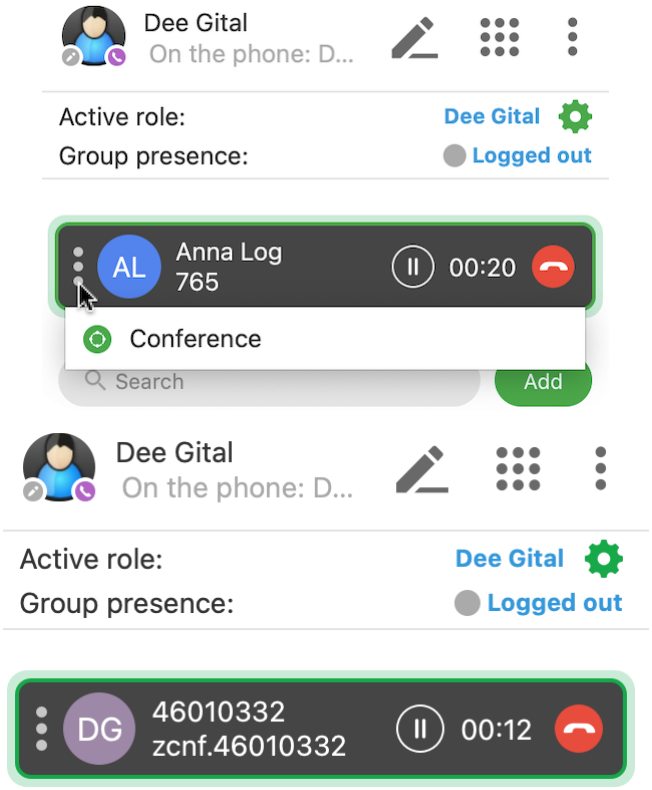
Accepting an internal invitation will prompt the user if they want to add the event to their calendar if you enable Calendar sync in Settings. The user may also select the option to save the choice.



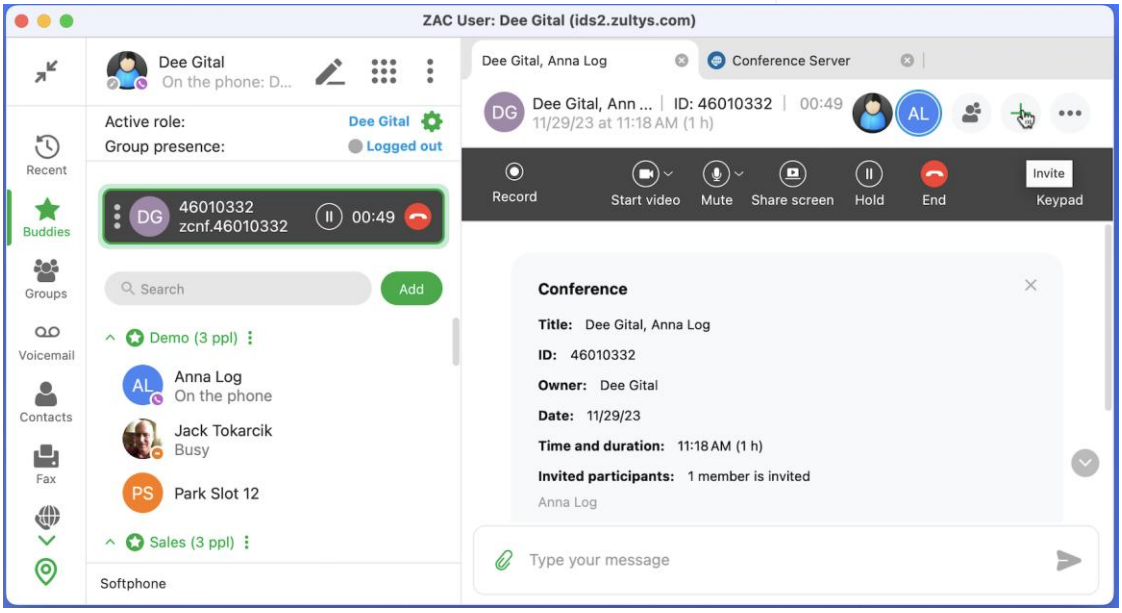
18.6 Ad Hoc Conference (invite participants)

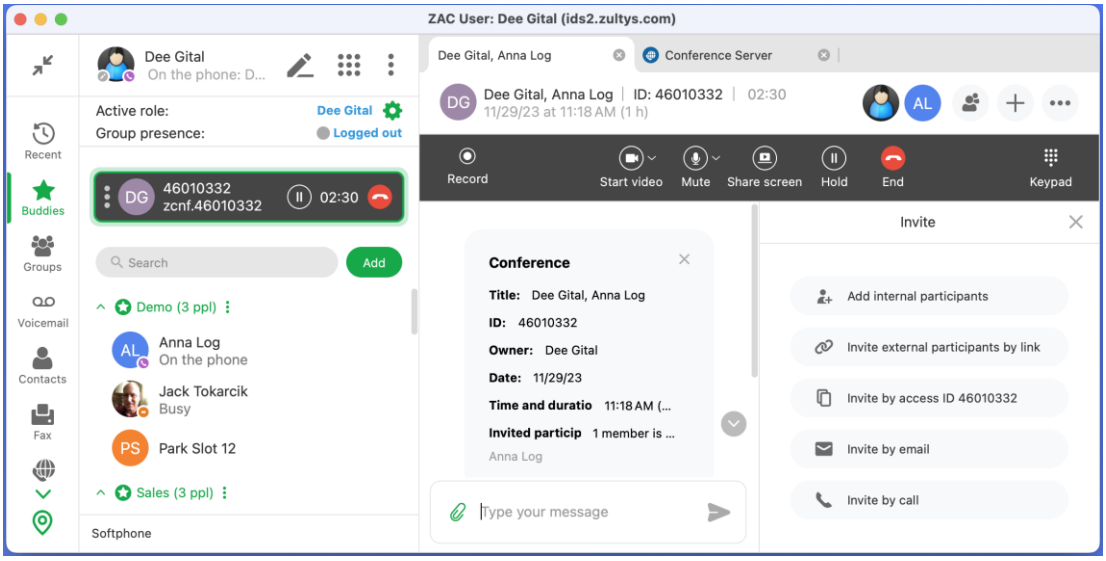
This feature allows a user to invite additional user to an existing ad hoc conference.

Convert an active call to a conference by clicking on the three dots and select Conference.



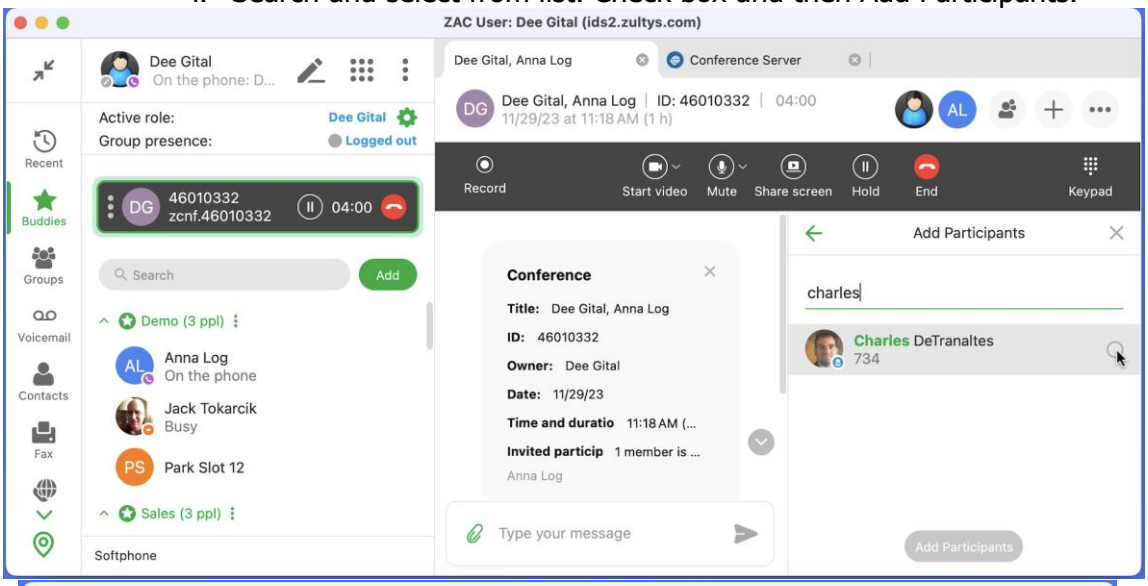
1. Click on the Plus sign to invite a user

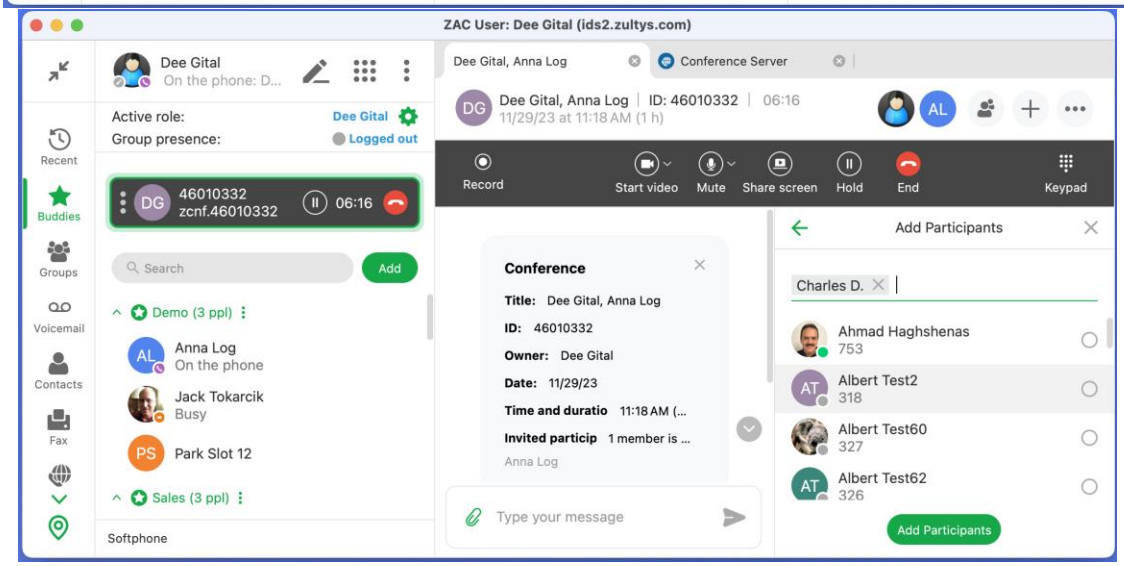

ZAC User: Dee Gital (ids2.zultys.com)
Dee Gital
On the phone: D...
Active role:
Dee Gital
Group presence:
Logged out
Recent
Buddies
Groups
Voicemail
Contacts
Fax
DG
46010332
zcnf.46010332
00:49
Search
Add
Demo (3 ppl)
Anna Log
On the phone
Jack Tokarcik
Busy
PS
Park Slot 12
Sales (3 ppl)
Softphone
Dee Gital, Anna Log
Conference Server
Dee Gital, Ann ...
ID: 46010332
11/29/23 at 11:18 AM (1 h)
Record
Start video
Mute
Share screen
Hold
End
Invite
Keypad
Conference
Title: Dee Gital, Anna Log
ID: 46010332
Owner: Dee Gital
Date: 11/29/23
Time and duration: 11:18 AM (1 h)
Invited participants: 1 member is invited
Anna Log
Type your message


ZAC User: Dee Gital (ids2.zultys.com)
Dee Gital
On the phone: D...
Active role:
Dee Gital
Group presence:
Logged out
Recent
Buddies
Groups
Voicemail
Contacts
Fax
DG
46010332
zcnf.46010332
02:30
Search
Add
Demo (3 ppl)
Anna Log
On the phone
Jack Tokarcik
Busy
PS
Park Slot 12
Sales (3 ppl)
Softphone
Dee Gital, Anna Log
Conference Server
Dee Gital, Anna Log
ID: 46010332
11/29/23 at 11:18 AM (1 h)
02:30
Record
Start video
Mute
Share screen
Hold
End
Keypad
Conference
Title: Dee Gital, Anna Log
ID: 46010332
Owner: Dee Gital
Date: 11/29/23
Time and duratio 11:18 AM (...
Invited particip 1 member is ...
Anna Log
Type your message
Invite
Add internal participants
Invite external participants by link
Invite by access ID 46010332
Invite by email
Invite by call

Add internal participants

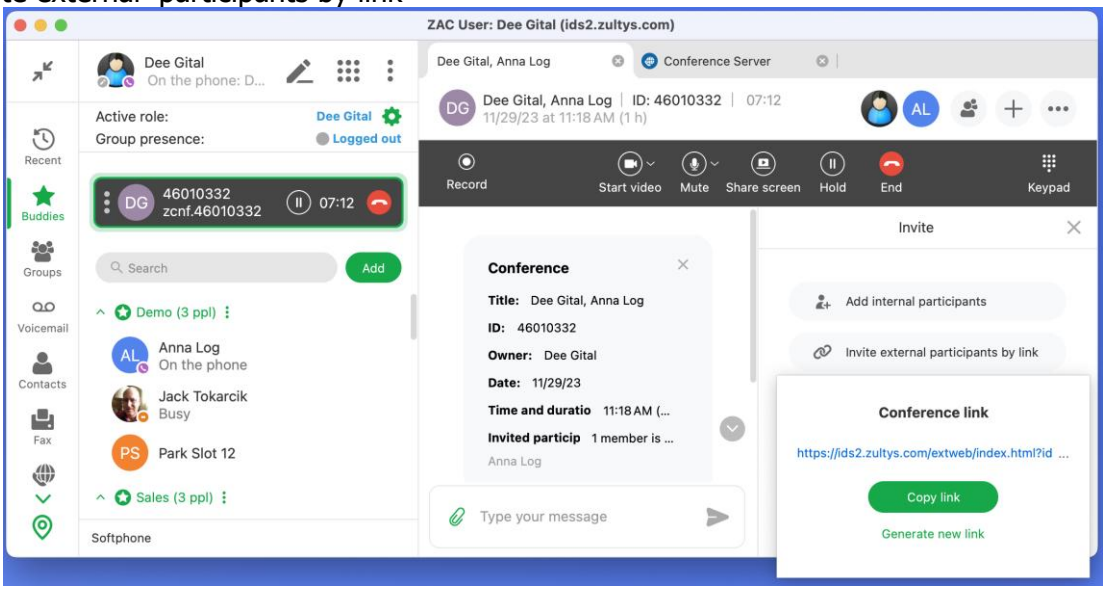
i. Search and select from list. Check box and then Add Participants.



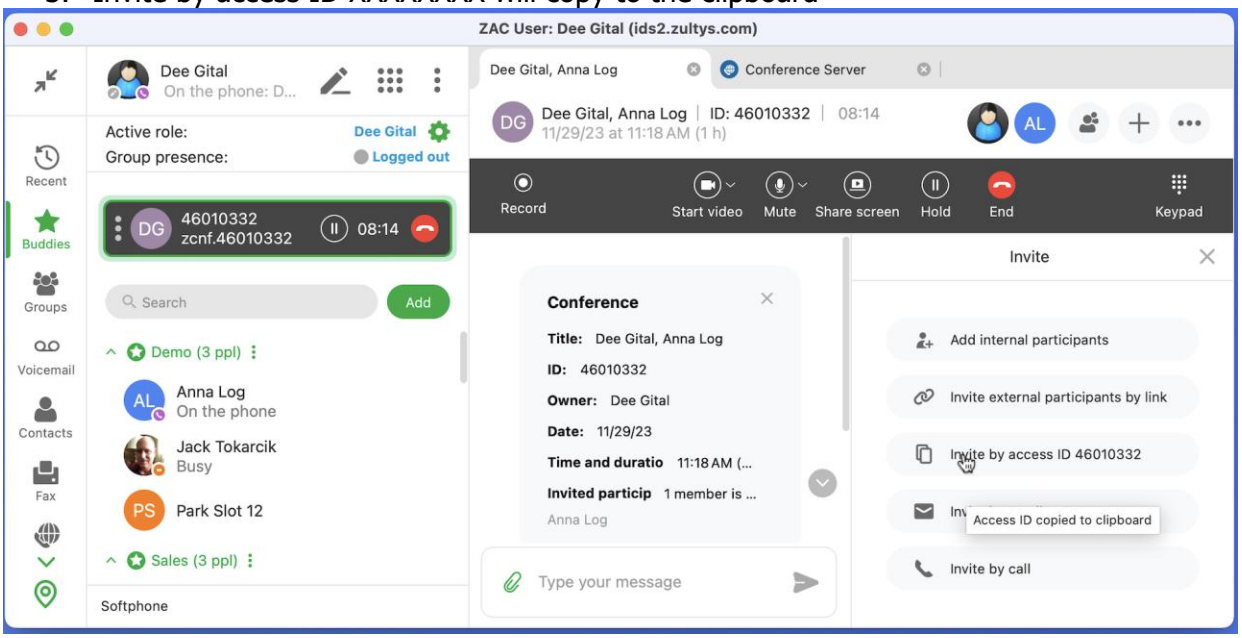


- The invitee will see the new active conference in their ZAC.

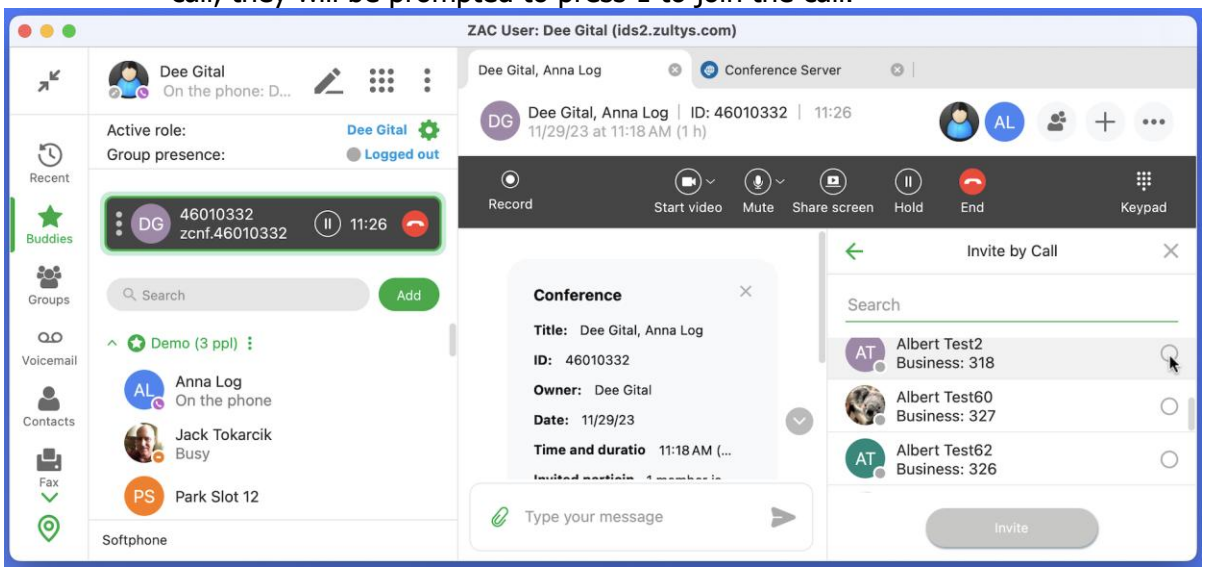
2. Invite external participants by link



3. Invite by access ID XXXXXXXX will copy to the clipboard



4. Invite by email. This just opens an email with the normal conference invite template.
5. Invite by call. Select and the MX will call them. When they answer the incoming call, they will be prompted to press 1 to join the call.

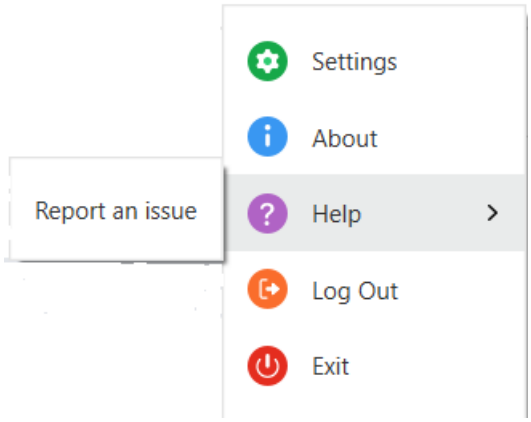


18.7 Report an Issue

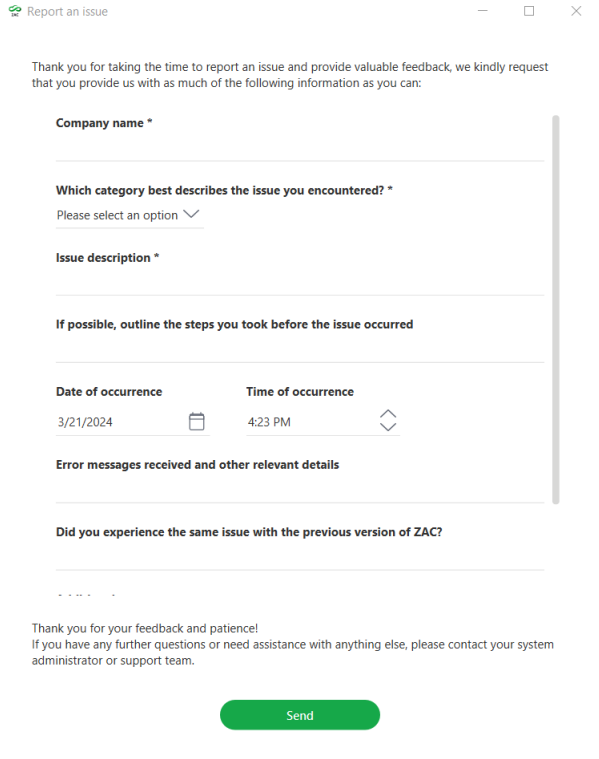
This allows users that encounter any application issues to report the issue. The report will include the diagnostic logs and the user may enter information and screenshots as well.

18.7.1 Operation

- Select More>Help>Report an issue



- Complete the form and include any information that may be related to the issue.

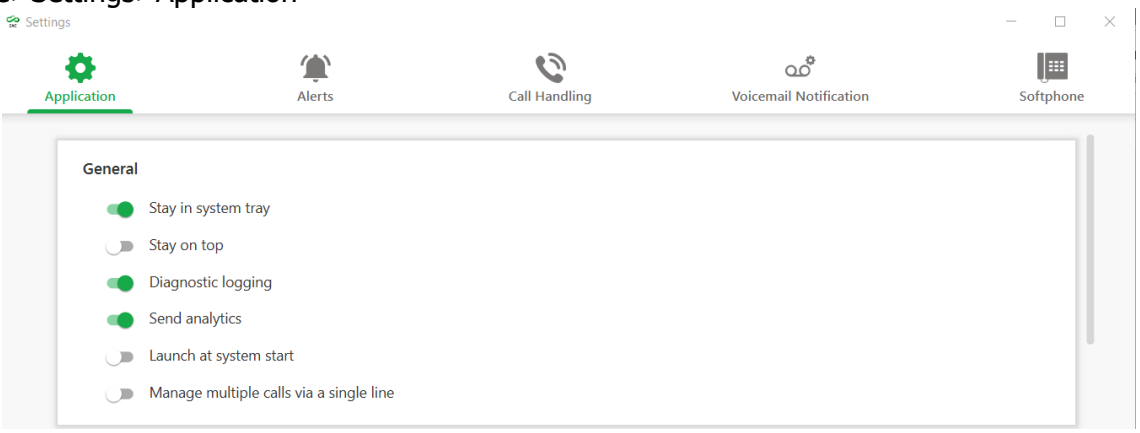


- Click Send.

18.7.2 Conditions

- Diagnostic logging must be enabled to include logs.

More>Settings>Application

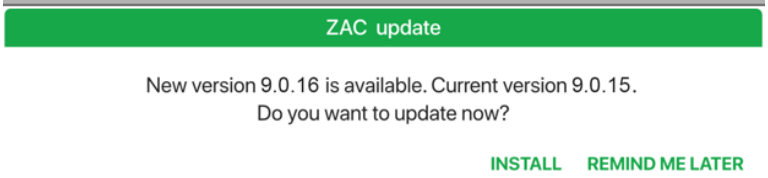


18.8 ZAC Auto Update

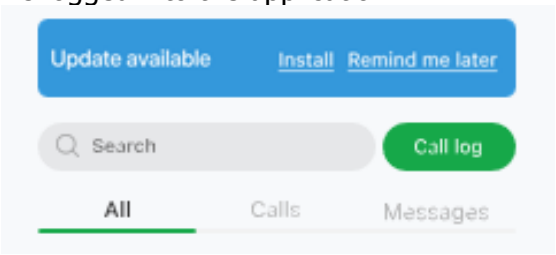
This feature provides a streamlined method of updating your ZAC application with new versions. The feature has flexible deployment options configured by your system administrators to control how ZAC users are updated.

18.8.1 Operation

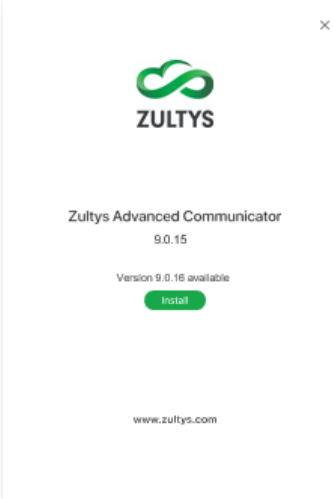
- Update at login - A notification pop-up appears when the user logs into the system, informing them about any updates that were released while they were logged out.



- Update during runtime - A notification will appear if a new ZAC version becomes available while the user is logged into the application.



- About screen – If you select remind me later, an option exists in the About screen to install the update.



18.8.2 Conditions

- ZAC users that are upgrading from ZAC version 8 to ZAC 9 must perform a manual installation from version 8 to 9.
- The ZAC upgrade feature is configured by your system administrator.

18.9 MMS

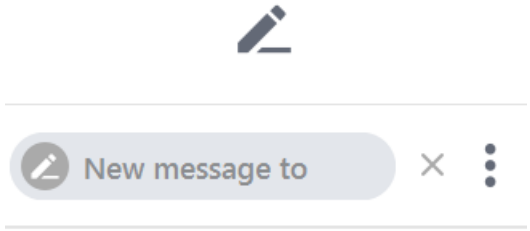
18.9.1 Description

This feature allows users to send and receive images/files when utilizing their SMS service.

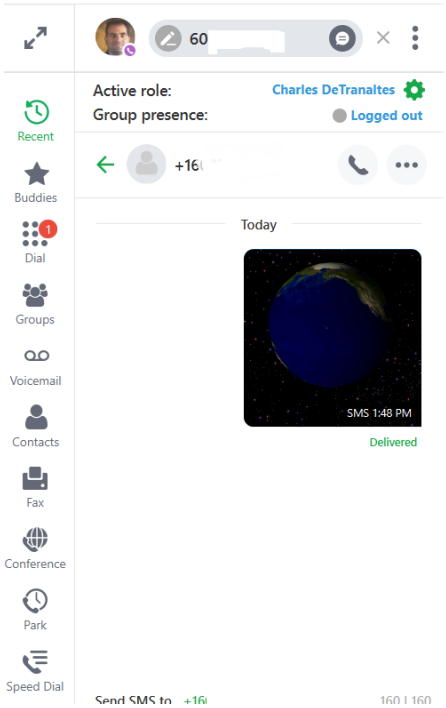
18.9.2 Operation

Sending

- Start a new SMS message by clicking the message icon and entering a phone number in the new message text box.



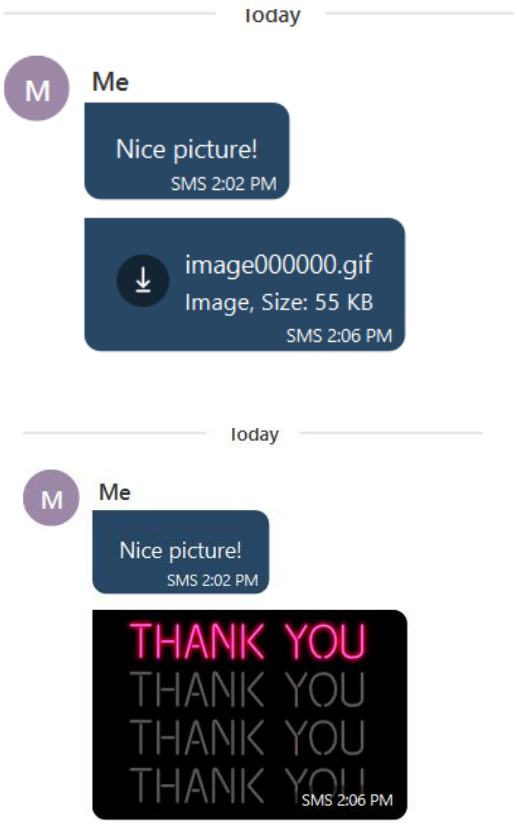
- Use the paperclip icon to add a file from a storage location or paste the image into the work area.



- Click Send

Receiving

When you receive an MMS attachment, you can click the download arrow to view the file.



The image is displayed in a thread once it has been downloaded by the user.

18.9.3 Conditions

- The maximum file size for an MMS file is 3.7Mb.

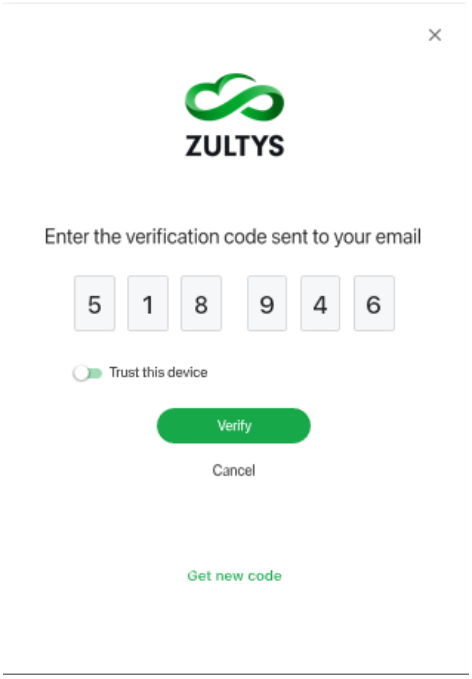
18.10 Multi Factor Authentication (MFA)

18.10.1 Description

MFA provides a second authentication method that requires verification prior to allowing the user to login to the application. This provides an additional security layer for the user. Authentication can be either via SMS or email notifications.

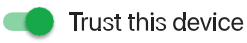
18.10.2 Operation

- Once configured, you will receive a verification code either via SMS or email.
- Enter the code in the MFA screen.
- Click Verify.



You may request a new code by clicking Get new code. This will send a new verification code either by SMS or email.

Users can skip MFA for future logins by switching on the toggle if the option is configured.



18.10.3 Conditions

- All MFA parameters are configured by your system administrator.

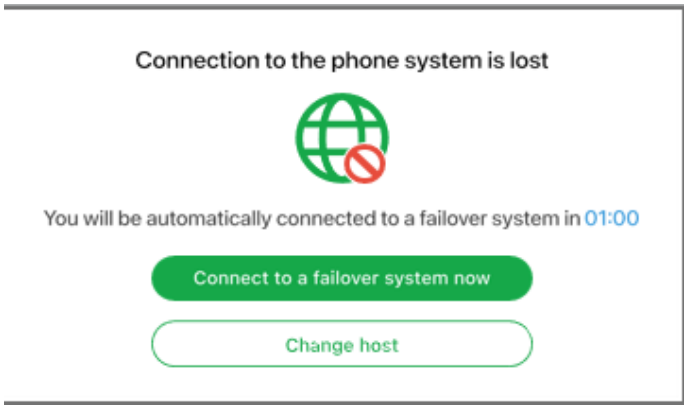
18.11 Failover/Redundancy

18.11.1 Description

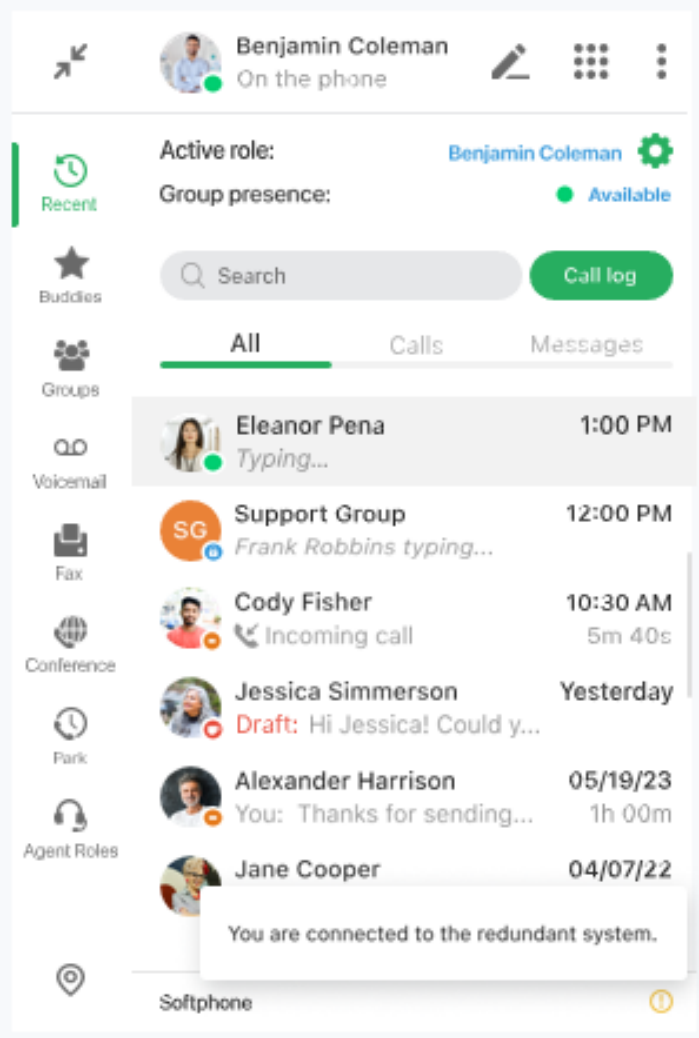
A ZAC user can now automatically failover to a redundant system in the event of a failure or outage of the primary system. The feature allows a seamless transition ensuring a reliable user experience.

18.11.2 Operation

- In the event of a system failure, a pop-up window is displayed informing that the connection is lost.
- You may:
  - Wait for the timer to expire and be connected to the redundant system
  - Click Connect to a failover system to immediately switch to the redundant system.
  - Click Change host to connect to another MX system.
    Changing the host allows the user to return to the main login window, where they have the ability to manually enter the new server address they wish to log into.



- You will see a notice icon at the bottom of the application that will display you are connected to the redundant system.



18.11.3 Conditions

- The system must be provisioned and configured for MXredundancy by the system administrator.

19 ZAC 9.2 Features

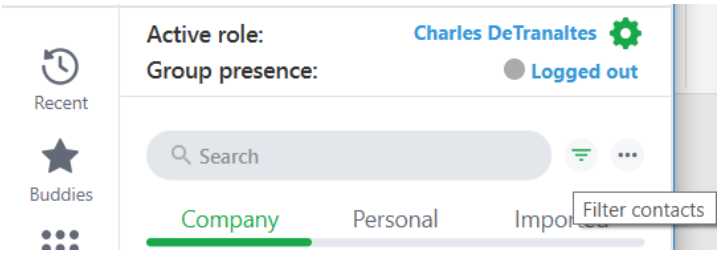
19.1 Departments

This features allows users to be configured into a Department. Within ZAC a user will be able to apply a filter to the Contacts list so that it only displays Users who are a member of the selected Department and any of its sub-departments (if there are sub-departments for the selected department).

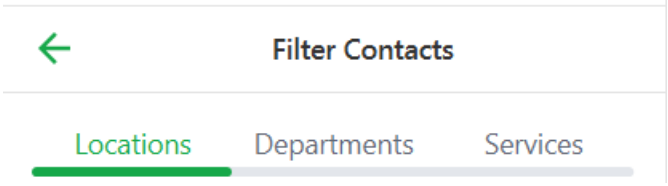
19.2 Operation

19.2.1 ZAC Client:

- Select Contacts and then click the Filter option:

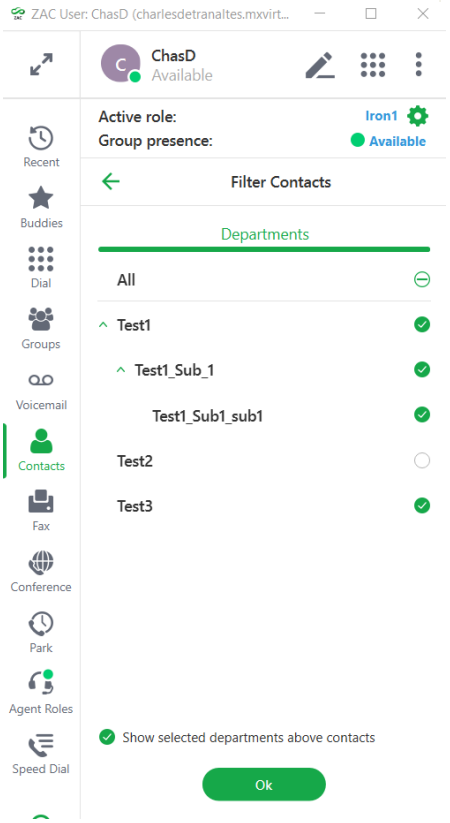


- Select Departments.

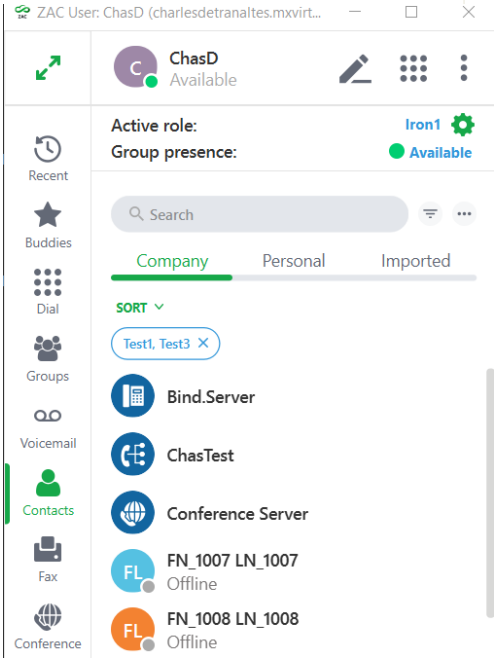


- Enable a department by clicking the circle next to the Department name.

  Enabling Show selected departments above contacts will display a department filter indicating which departments are active.



The contacts will now display only the selected departments:

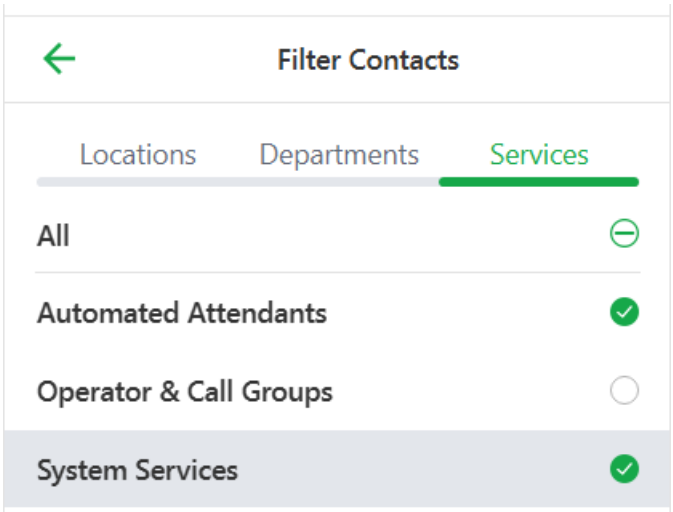


Only Test1 and Test3 department contacts are displayed

19.2.2 Services

You may also filter out services such as Auto Attendant, call groups, etc.

- Select the filter and select Services.
- Click the services to filter out and click OK.

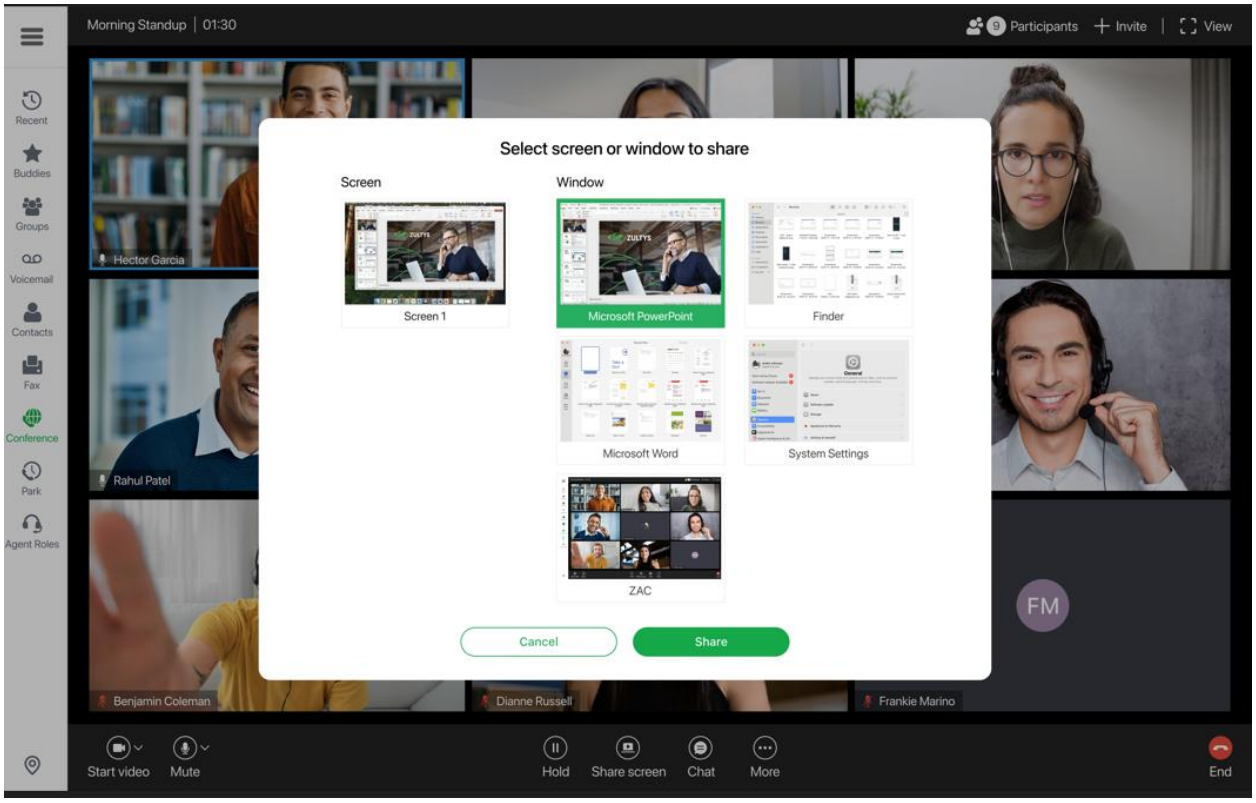


19.3 Screen Selection

19.3.1 Description

ZAC 9.2 allows you to select which screens (monitors) and window within each screen to share.

When you start a screenshare session you will be prompted as follows:



- Select a Screen (monitor) to share.
- Click the screen to share the entire screen or select a particular window to share.
- Click Share

20 ZAC 9.4 Features

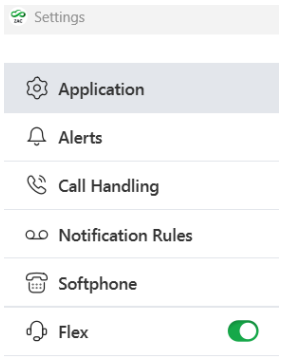
20.1 Flex Application

The Flex application is now included in ZAC 9.4 and available when connected to an MX 18.4 (or greater) system. The Flex application can launch a URL, execute an Application (command line), or connect to the Flex Plus application.

20.1.1 Operation

To enable/disable the Flex application:

- Settings>Flex

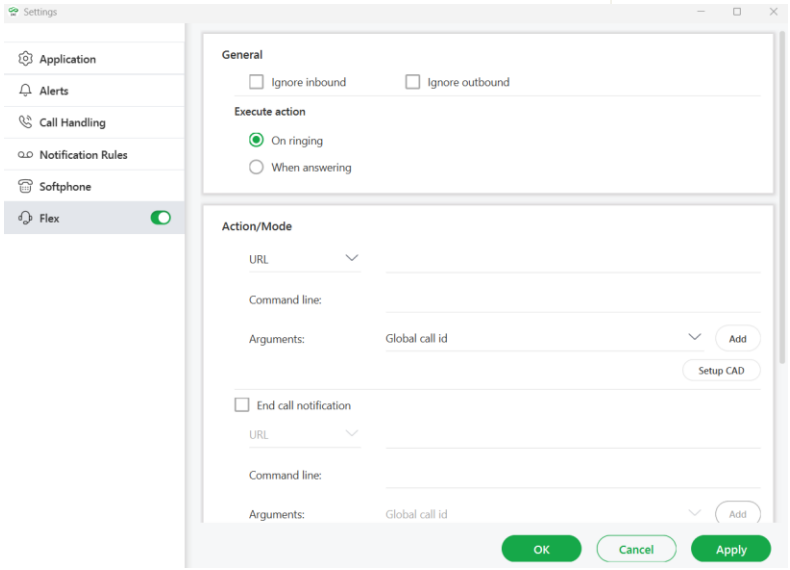


- Toggle the slider to enable/disable the Flex application.

20.1.2 Flex Configuration parameters

To configure Flex application parameters:

- Settings>Flex>Click Flex in the Settings menu to configure Flex parameters.



- **General>Ignore Inbound** and **Ignore Outbound** checkboxes determine whether the configured action is executed for inbound and outbound calls respectively.
- **Execute action>On ringing** – The Action is executed when an incoming call is offered to the User.
- **Execute action>?When answered** – The Action is executed when an incoming call is answered by the User.

The Action/Mode section determines the URL or Application that is executed upon receipt of a call as well as the parameters appended to the action.

Examples of URL and Application entries that can be used to initiate an Action with Flex are included in later sections.

- **URL** – When selected the defined URL with Command Line arguments appended is executed in the default web browser.
- **Application** – When selected the specified application with Parameters argumentsappended is executed. The full path to the application must be specified. For example: C:\Program Files\Internet Explorer\iexplore.exe
- **Command line/Parameters line:** This field defines the text and parameters to be appended to the URL or Application command.
- **Arguments:** Select an item from the drop-down list then press Add to insert it in the Command Line. When the Action is executed, the place holder is replaced with the

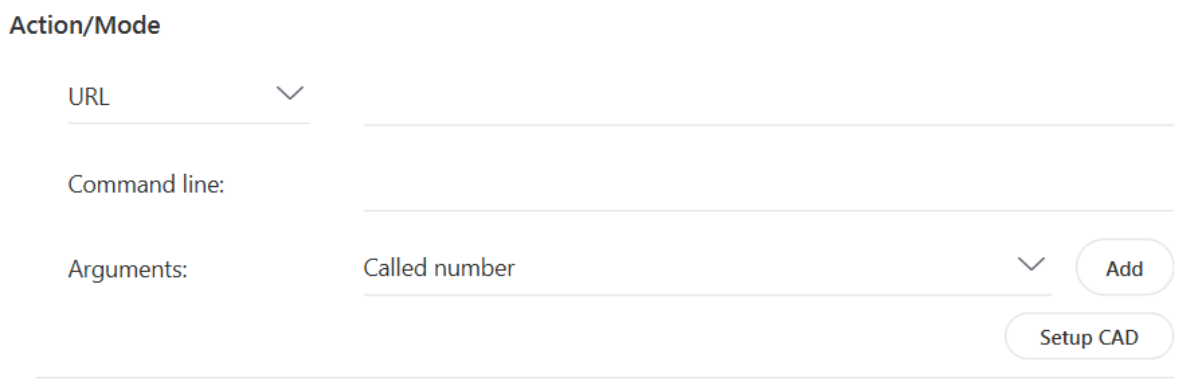
corresponding call specific information. Separate two or more items in the field with a blank space.

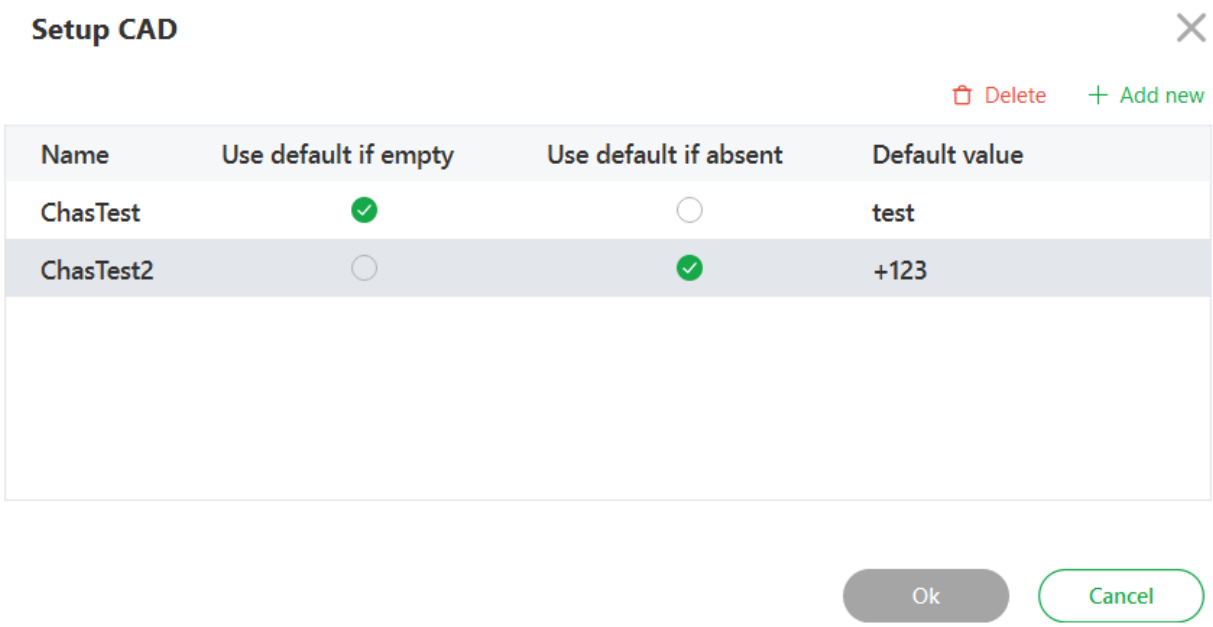
20.1.2.1 Using CAD fields in query

It is possible to include Call Attached Data (CAD) field values in the parameter line. The CAD feature is configured through the MX Administrator. It allows additional notes and call specific information to be attached to a call when it is forwarded to a user. CAD fields can be attached to a call via Auto Attendant and Call Attached Data Templates. CAD fields apply to both inbound and outbound calls.

Note that to enable the CAD fields for calls you must configure the Auto Attendant settings as well as Call Attached Data Templates in MX Administrator.

To use a CAD field as part of the parameter line, you must first setup the CAD field by pressing the *Setup CAD* button in the *Parameter* tab.

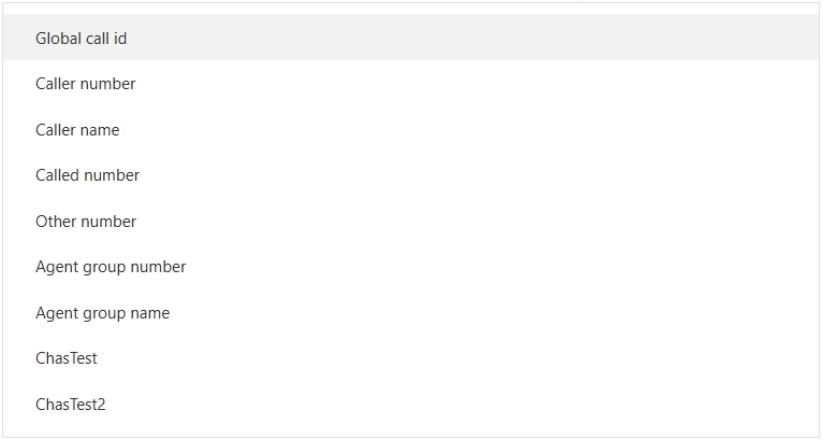




To add a new CAD field:

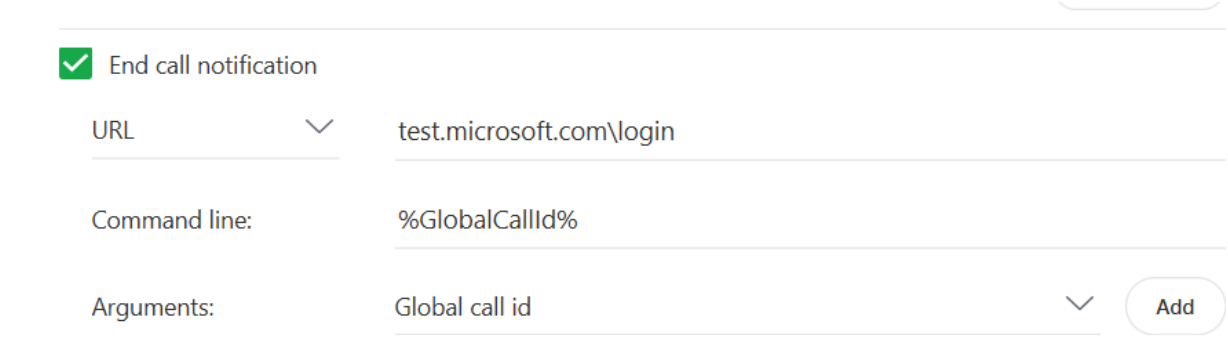
- Click Add new button. A new entry in the list box will appear.
- Specify the name of the CAD field in the *Name* column.
- The two other options on the list refer to how Flex interprets calls which contain the defined CAD field but the field is empty, or if the call does not contain the CAD field at all. When *Use Default if Empty* is enabled, Flex will use the value specified in the *Default Value* column when performing a query for calls that include this CAD field but the CAD field does not contain any value. When *Use Default if Absent* options is enabled, Flex Communicator will use the value specified in the *Default Value* column when performing a query for calls that do not contain this CAD field
- Click *Ok* when you finish configuring the CAD values.

The CAD field has been added to the drop-down list of *Arguments* options and can now be inserted into the parameter line.



20.1.3 End of Call Notification

The End of Call Notification Action section determines the URL or Application that is executed upon the completion of a call. The parameters (Global Call Id, Call Duration) can be appended to the action as well.



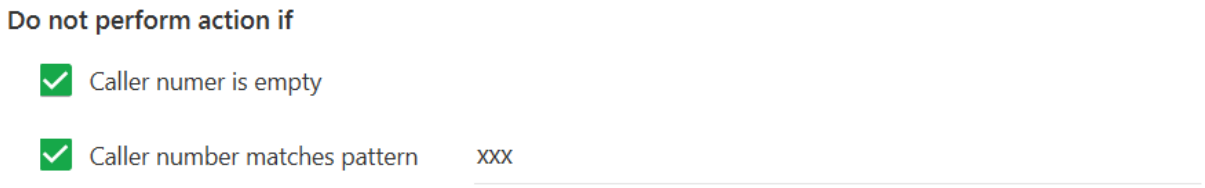
- By default, this function is not enabled. To enable, check the End call notification checkbox.
- Select the desired action parameter (URL/Application) from the drop down selection. Add any necessary command line parameters.
- Select an item from the Arguments drop-down list then press Add to insert it in the Command Line. When the Action is executed, the place holder is replaced with the corresponding call specific information. Separate two or more items in the field with a blank space.

20.1.4 Do not perform action if

This section allows calls with no caller ID and/or calls with a caller ID that matches a defined pattern to not trigger the defined Action. The Action section determines the URL or Application that is executed upon receipt of a call as well as the parameters appended to the action.

- **Caller ID is empty** – When enabled a call received without a Caller Number does not trigger the defined Action.
- **Caller ID matches pattern** – When enabled a call received with a Caller Number that has the same number of digits as the number of characters defined in the pattern will not trigger the defined Action.

  The example below would be appropriate for a company that uses 3 digit extension numbers.



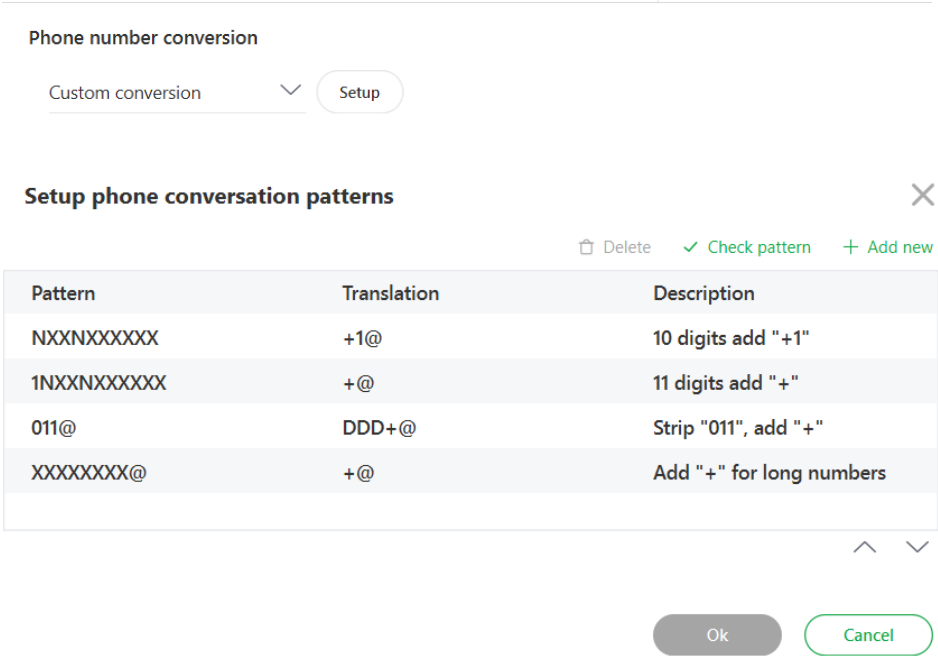
Note: Flex only takes into account the number of symbols entered when evaluating the pattern. It is recommended to use the character 'x' to symbolize each digit position. Only a single pattern may be entered.

20.1.4.1 Phone number conversion

This field allows you to select the number of digits that will be passed to the CRM application or select a Custom Conversion.

Digits

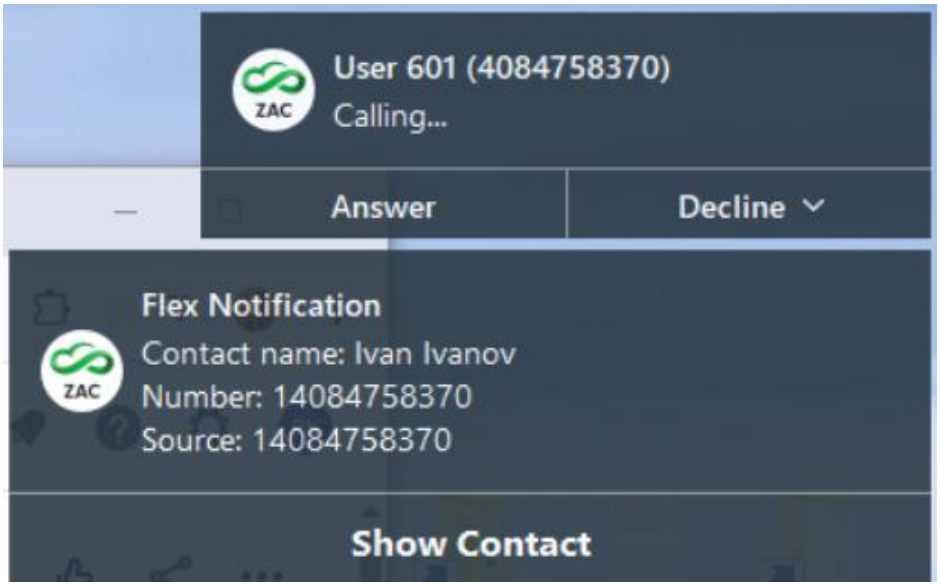
Custom – Click Setup after selecting Custom conversion



- Default settings will convert most phone numbers into E.164 format.

20.1.5 Flex Notification

The Flex notification popup will appear (if configured) when an incoming call is received.



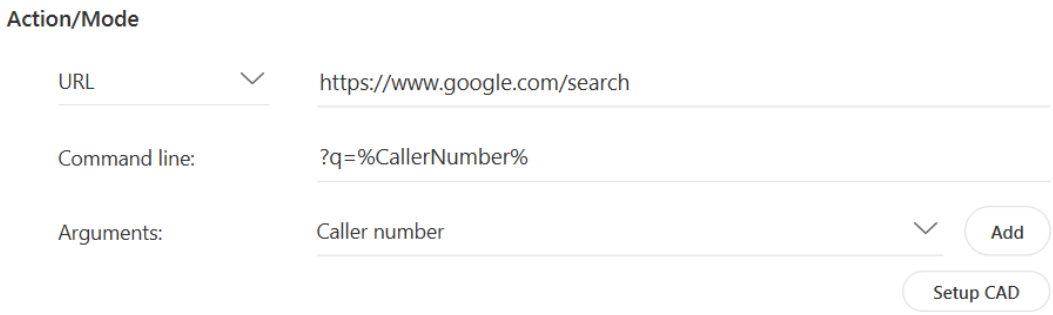
20.1.6 Examples of Action configurations

The Flex application provides a flexible interface between the Zultys MX phone system and 3rd party applications. It can be used with any web based system that can be accessed via execution of a URL or any Windows application which can be accessed via a command line. This section details several examples of using Flex.

- **Searching Google for the received Caller Number using the default Web Browser.**

  Select URL from the drop-down list and type the following web address:
  https://www.google.com/search?q=

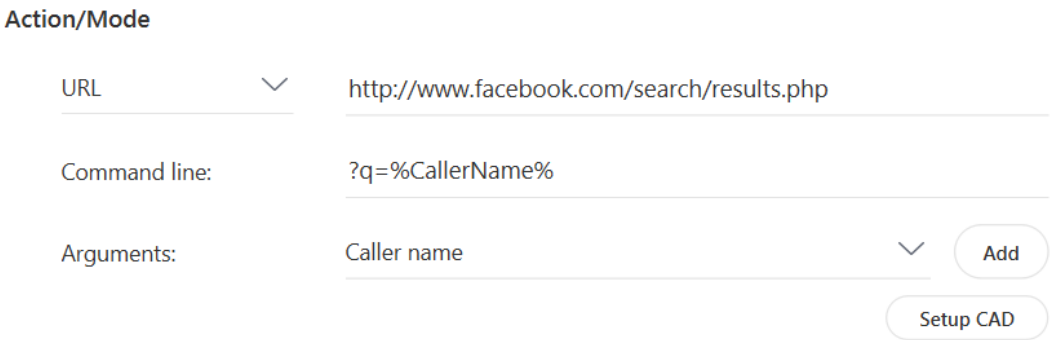
  In the Argument drop-down list select Caller Number and press Add.



- **Search Facebook.com for the received Caller Name using the default Web Browser.**

  Select URL from the drop-down list and type the following web address:
  http://www.facebook.com/search/results.php?q=

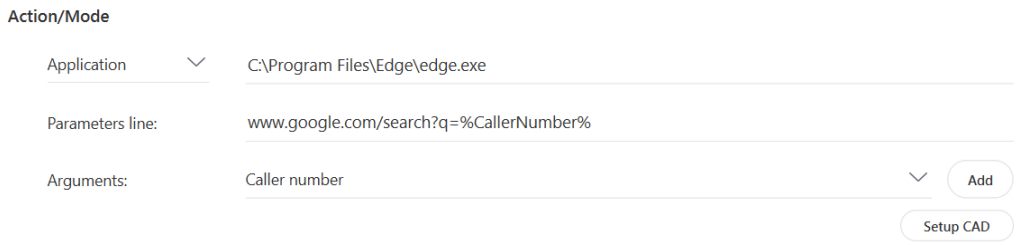
  In the Argument drop-down list select Caller Name and press Add.



- **Launch Internet Explorer application and search Google for the received Caller Number.**

  Select Application from the drop-down list and type the following application and path:
  C:\Program Files\Internet Explorer\iexplore.exe

  In the Parameters Line specify the following URL and argument:
  www.google.com/search?q=%CallerNumber%



20.1.7 Conditions

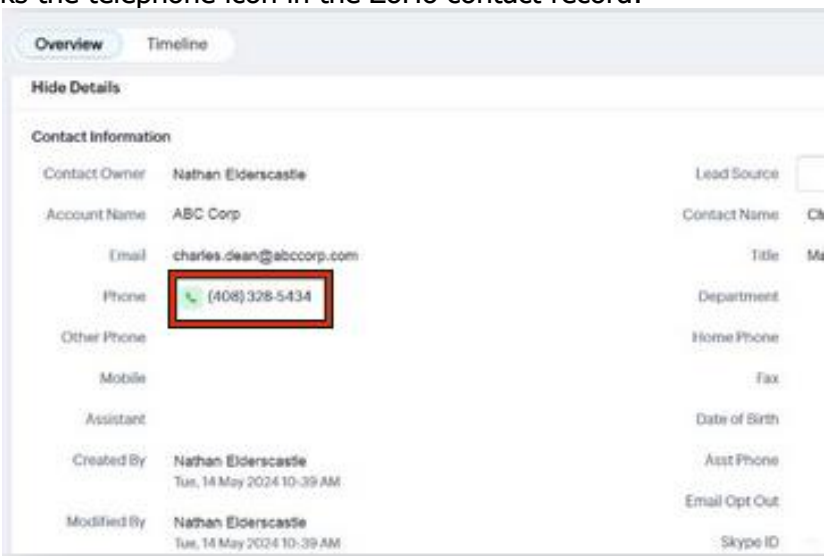
- The Flex application requires only the ZAC user license. No separate license is required to utilize the Flex application in ZAC 9.4.
- The MX system must be running Release 18.4 or later.

20.2 TEL click to dial from ZoHo

20.2.1 Description

ZAC 9.4 has been enhanced so that Contacts in the ZoHo CRM application can be dialed by clicking the phone number in the contact record. ZAC will be used to place the call.

20.2.2 Operation

- The user clicks the telephone icon in the ZoHo contact record:
- 

20.3 SAML based Single Sign-On support

ZAC 9.4 supports SAML based Single Sign-On (SSO) authentication starting from MX Release 18.4. By integrating an MX system with SSO ZAC may be authenticated via SAML ensuring that enterprise-wide security requirements and access controls are enforced.
ZAC 9.4 supports SAML based Single Sign-On when used with an appropriately configured MX system running Release 18.4 or later.

SAML SSO has been developed and tested with Microsoft Entra ID and ClassLink, with the potential to support other identity providers such as Okta, Duo, Auth0, and OneLogin.

With SSO, users can log into ZAC and connected apps using a single set of credentials, eliminating the need to juggle multiple passwords or perform repeated logins. This enhances security with options like multi-factor authentication (MFA) via the identity provider, while reducing password fatigue and streamlining access.

20.3.1 Operation

Once configured on your MX user account, refer to Section 2.1 for standard and SO login procedures.