Technical Publications

ZULTYS

November 2024

Mobile ZAC 1.2 Quick Reference Guide

Revision 1

Zultys Mobile ZAC 1.2 Quick Reference Guide

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Revision History

Date/Revision	Comments
October 2024/Revision p1	Early Access release
November 2024/Revision 1	GA release version

2 Description

This document provides a quick reference to using the Mobile ZAC application. The Mobile ZAC application allows users to take advantage of MX features on their mobile devices.
This document describes basic operation and includes the new features that were added with the version 1.1 update.

To view the new features that were added:

New Features Mobile ZAC version 1.2

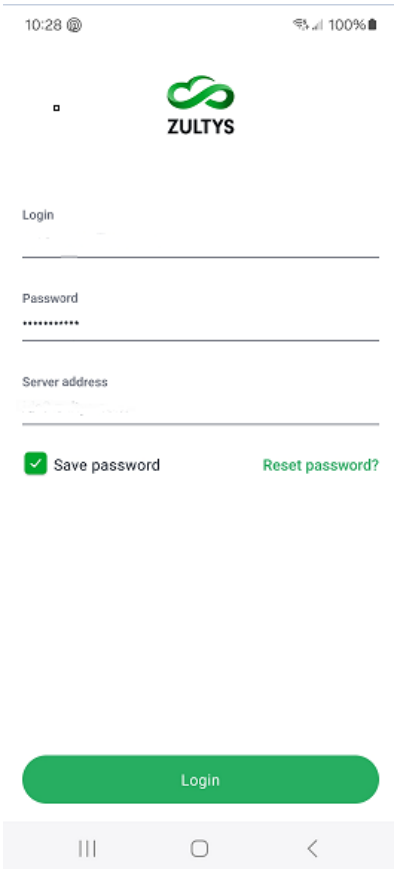
3 Basic Functionality

3.1 Starting the application

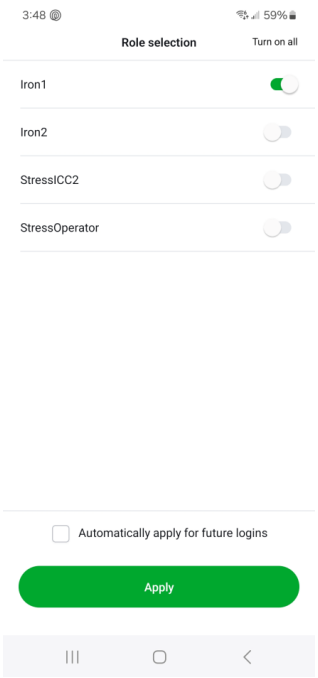
- Tap the mobile ZAC icon on your phone.

3.2 Log In

- Enter your Login username, password and MX IP address or domain name.
  Check the Save password option for subsequent log ins.
  Click the Reset password option to generate a password reset email.
  Click the Login button



If you are a member of a call group the group Role selection screen will appear:

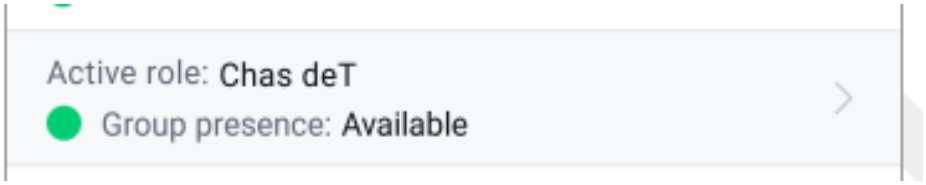


- Slide each group control or select turn on all to enable the role.
  TIP: Check the box to "Automatically apply for future logins" so that your settings are saved and will not need to be entered for subsequent logins
- Click Apply

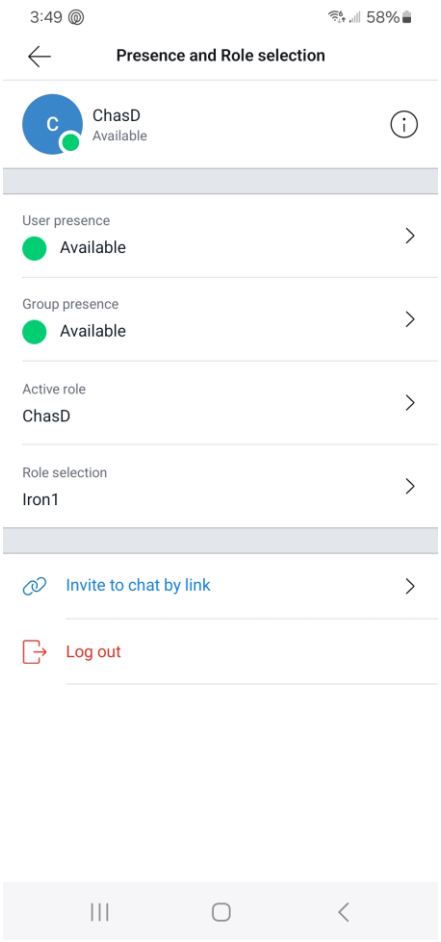
3.3 Log out

When finished using the application, perform the logout function to stop receiving notifications.

- Tap the presence area at the top of the application.



- Tap the Log out button.



3.4 Making and Receiving calls

To make a call to another MX user:

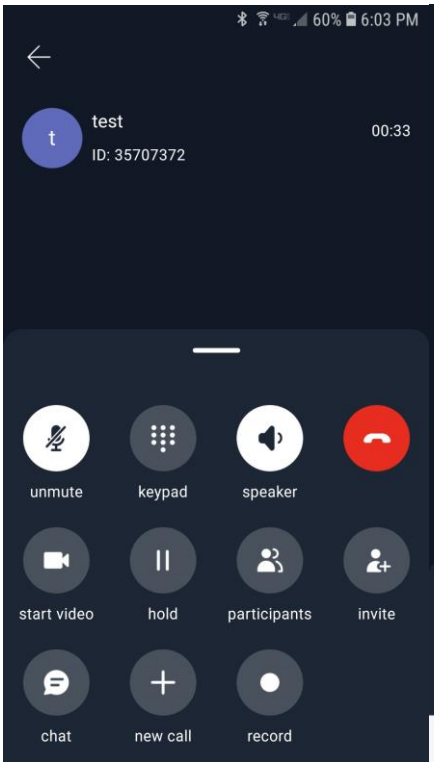
- Tap Buddies, Contacts/Address book, or Recent to locate and call another MX user.
  Swipe left in Recents to present the call option.
  Tap the handset icon for a user in Contacts and Buddies.

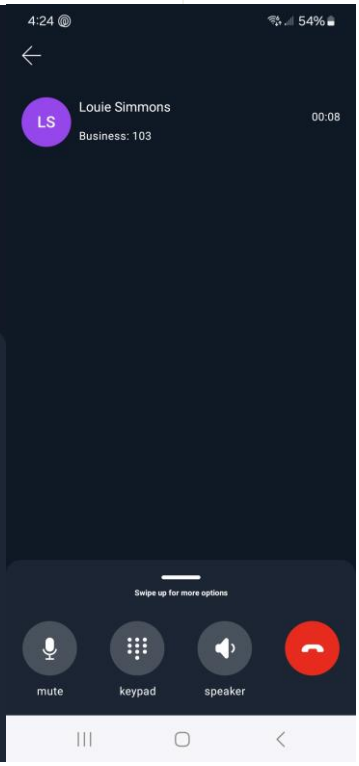
To make an external call:

- From either Recent or Contacts Tap the dialpad icon. Dial the phone number and tap the call icon.

Call options

- Expand or collapse the available options during a call by sliding the option panel up or down. Any options that are not available while on a call are greyed out.

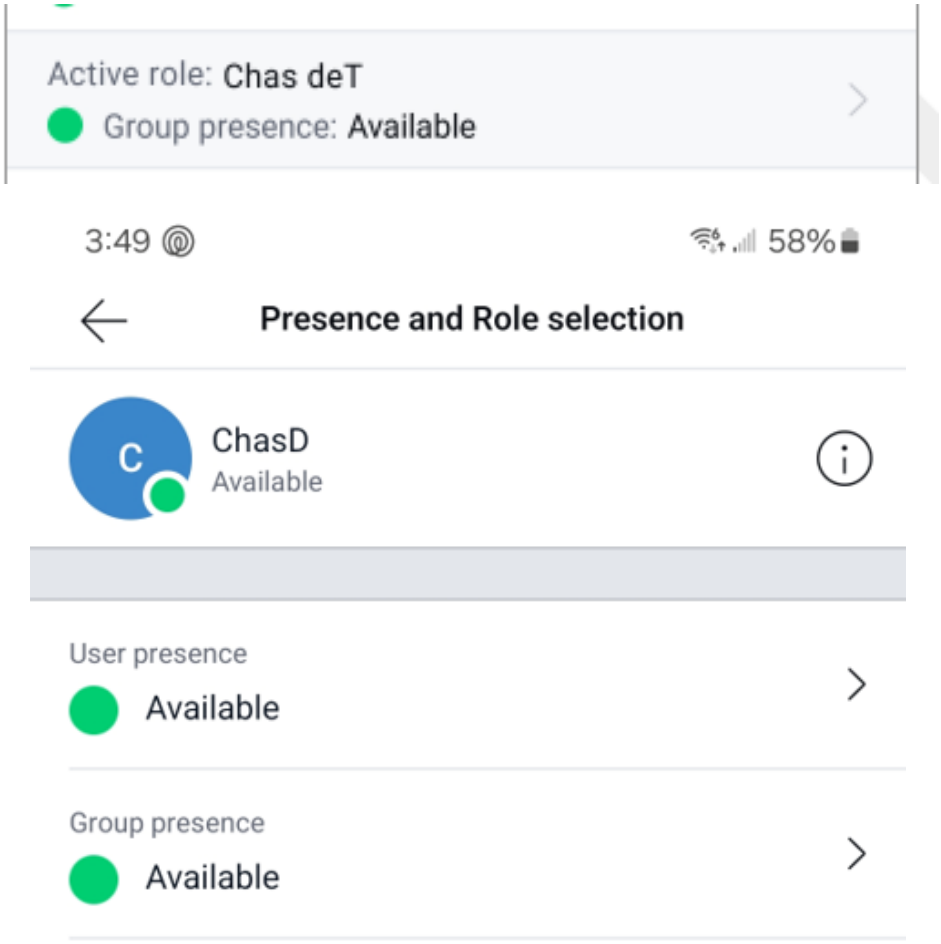

60% 6:03 PM
test
ID: 35707372
00:33
unmute
keypad
speaker
start video
hold
participants
invite
chat
new call
record


4:24
54%
Louie Simmons
Business: 103
00:08
Swipe up for more options
mute
keypad
speaker

3.5 Presence

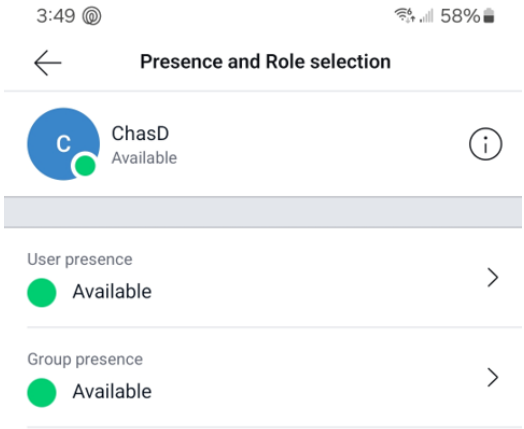
Both User and Group presence state may be changed.

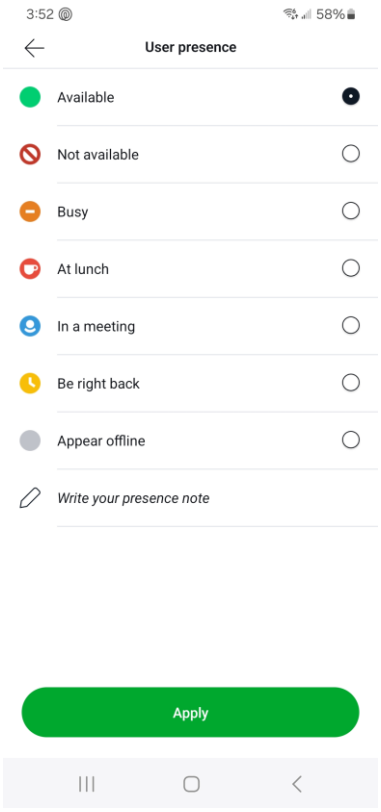
- Tap the presence area at the top of the application.



3.5.1 User Presence:

- Tap User presence

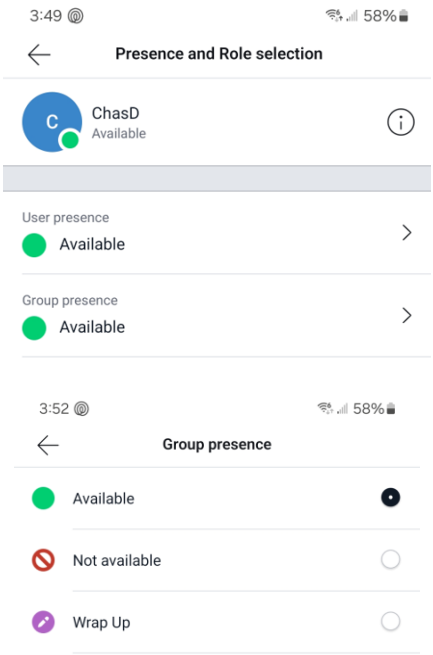


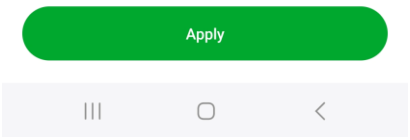
- 

- Tap the desired presence state. A note may also be added in the presence note area.
- Click Apply

3.5.2 Group Presence

- Tap Group presence:



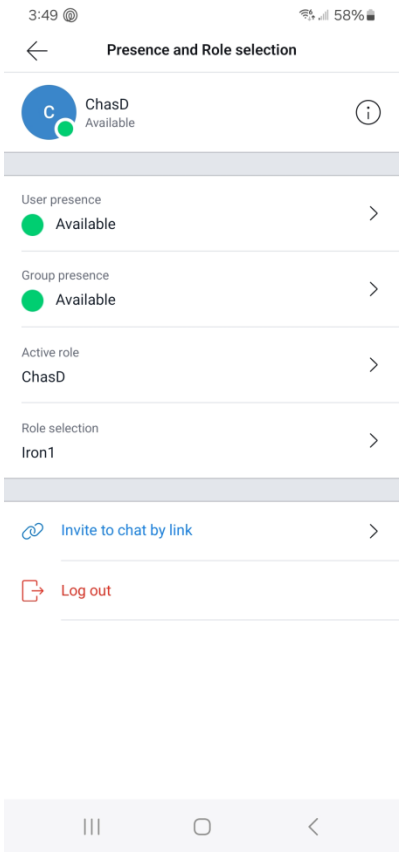


- Tap the desired presence state.
- Click Apply

3.6 Active Role

This allows the selection of a user or group as the main role.

- Tap Active role

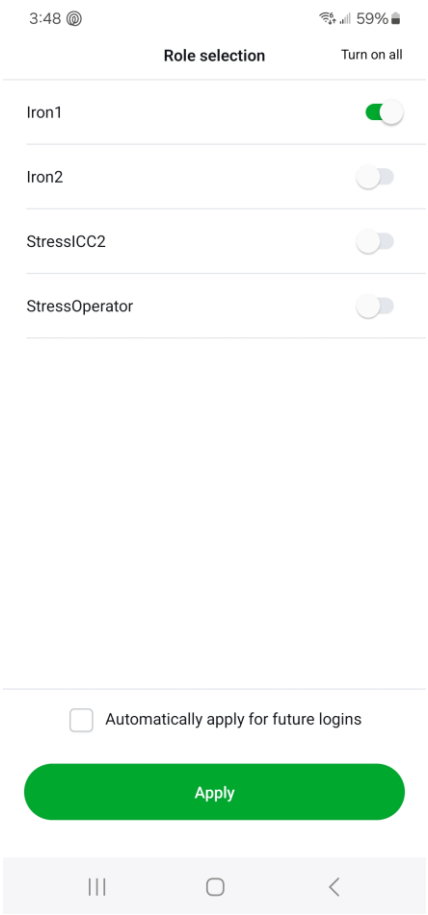


- Select the user or group role to make active.
- Click Apply

3.7 Role Selection

Allows the selection of call groups the user is to be part of.

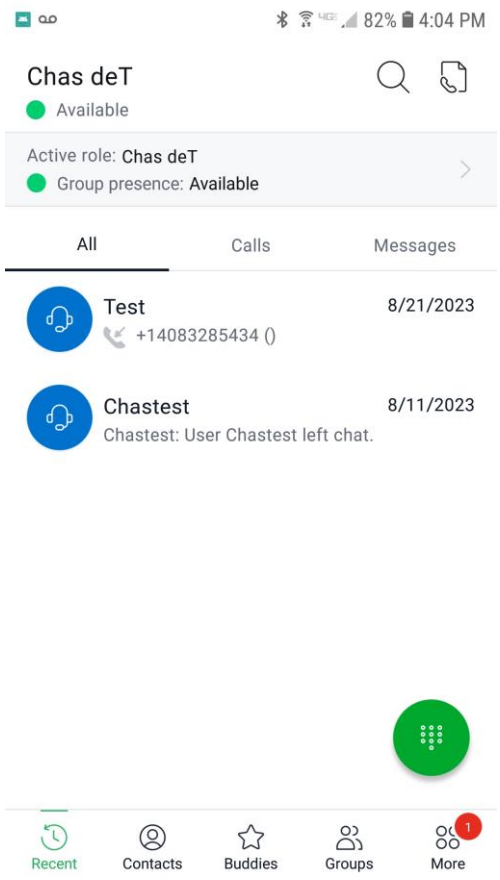
- Tap Role selection



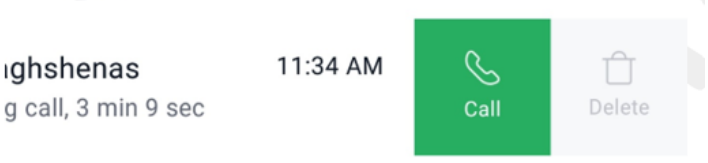
- Slide the control or select "Turn on all" to enable all group roles.
  You may also select Automatically apply for future logins" so Roles will be applied to subsequent logins.
- Click Apply

4 Recent

The Recent area displays recent call and message activity.
Tap All – Calls – Messages to filter by activity type.



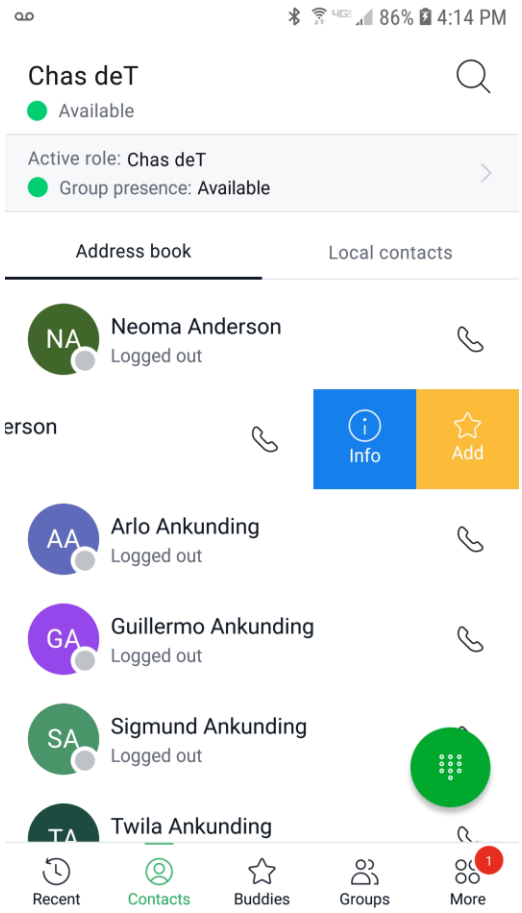
- Swipe left on an item to view the available options:



- Tap and hold to enter a chat session with another user.
  Tap and hold on a phone number to start an SMS session with the user.

5 Contacts

The Contacts area displays the address book of other users in your system. Local contacts (Outlook) can also be displayed as well.



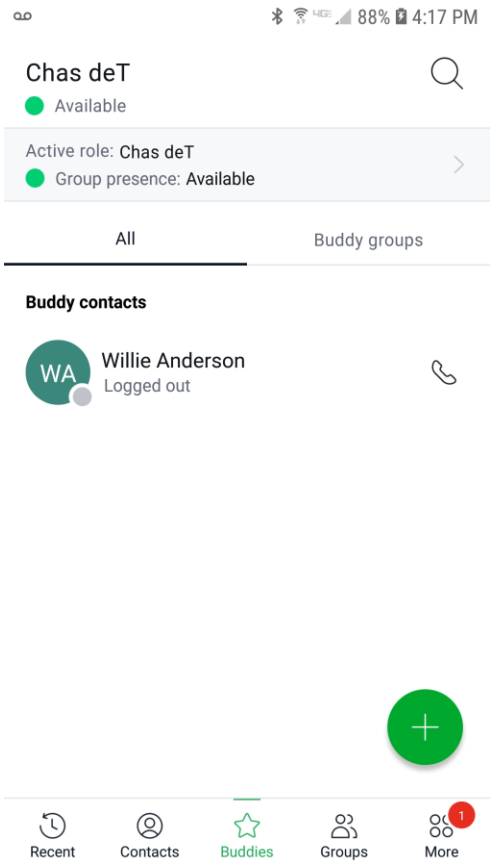
- Swipe left on an address book contact to view their information or add them to your buddy list.

- Tap a local contact to place a call or send a text message to the contact.

6 Buddies

The Buddies area displays users you have designated as a buddy. This area also provides access and management to the Buddy groups feature.

- Tap the buddy to initiate a chat session with the buddy.



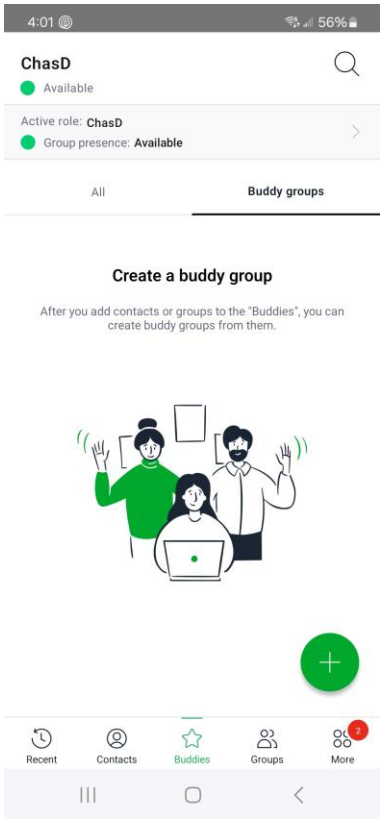
Swipe left on a buddy to view all the options with More. Remove will delete the buddy from your list:

6.1 Buddy groups

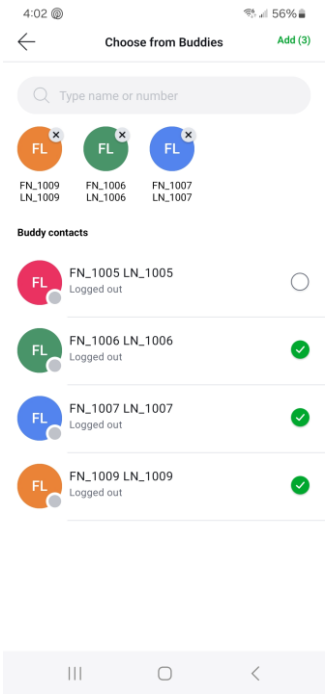
Buddy contacts may be organized into user defined groups (example, by dept Sales, Service, etc.).

6.1.1 Create a buddy group

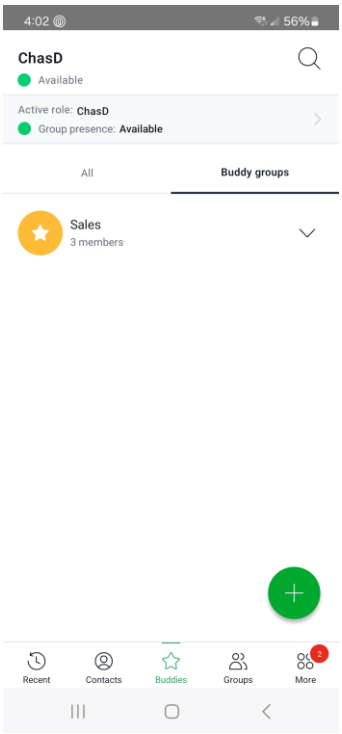
- Tap the Buddy groups area
- Tap the Add icon



- Enter a group name and select the Buddy contacts to be included in the group.
- Click Add in the right corner

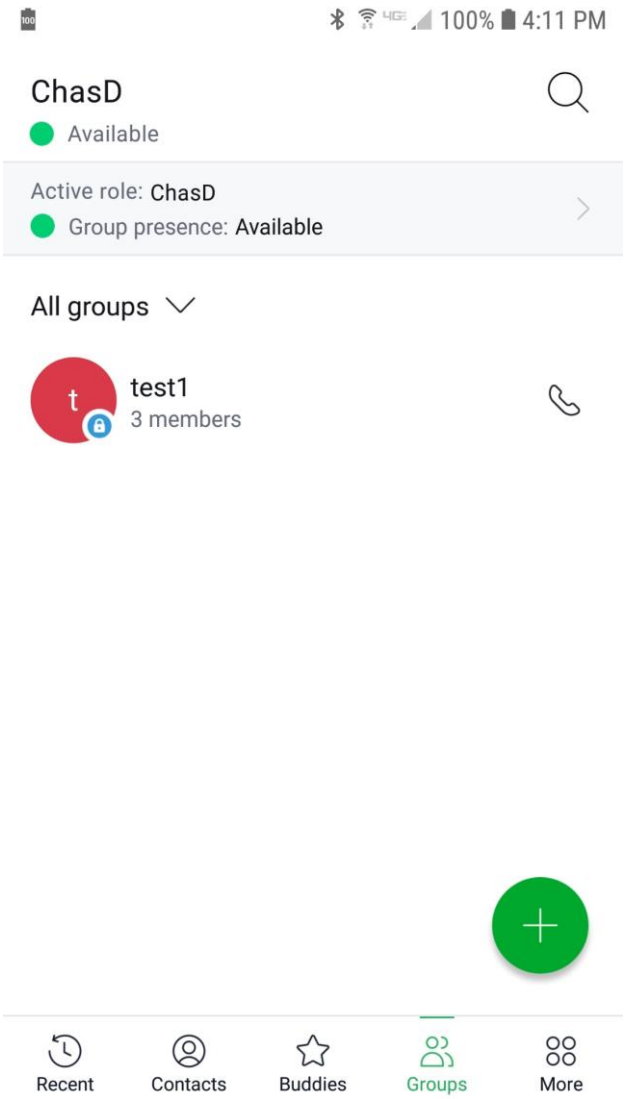


- The Buddy group will appear in the Buddy groups area.

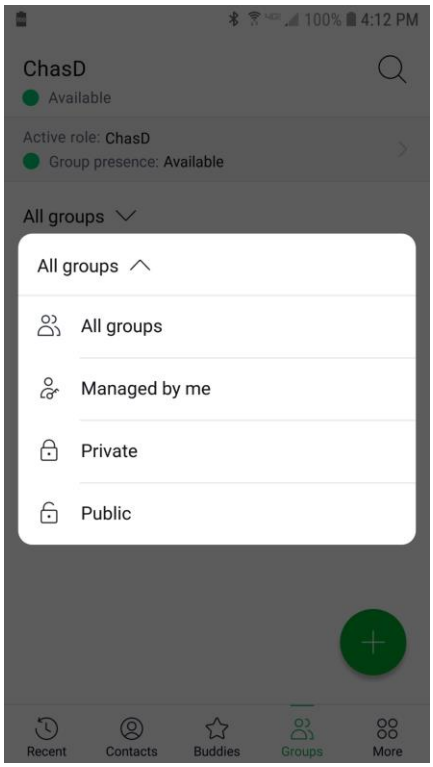


7 Groups

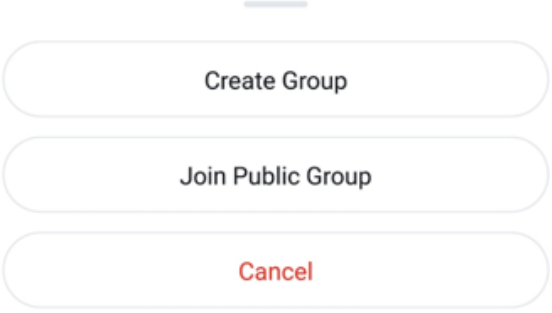
The Groups area displays all Chat Groups that are available in the system. This area also allows the creation and management of Groups.
The main screen will display a list of All chat groups.



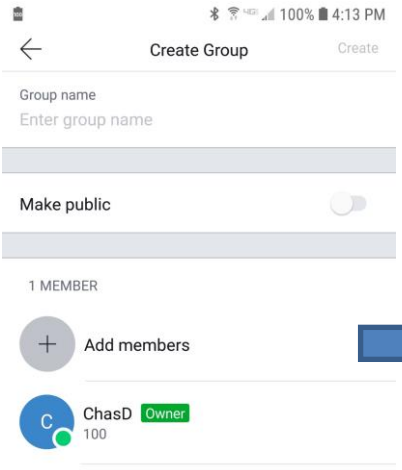
- Tap All groups to filter the group types displayed in the list. Select the group type to apply the filter to. Once selected, only those group types will be displayed.

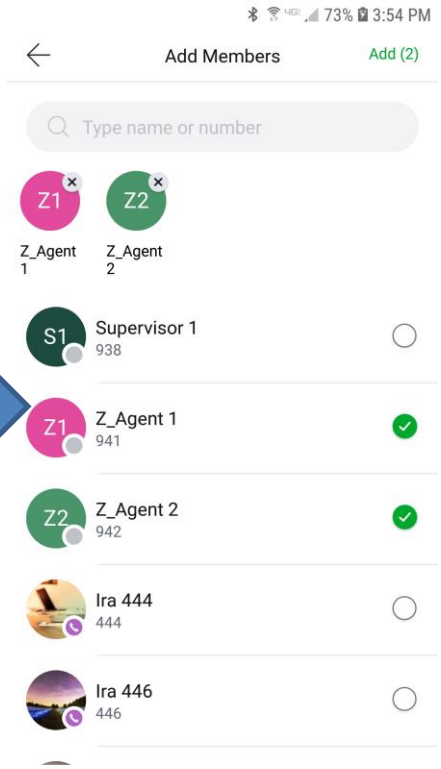


- Tap the icon to view group options at the group screen.

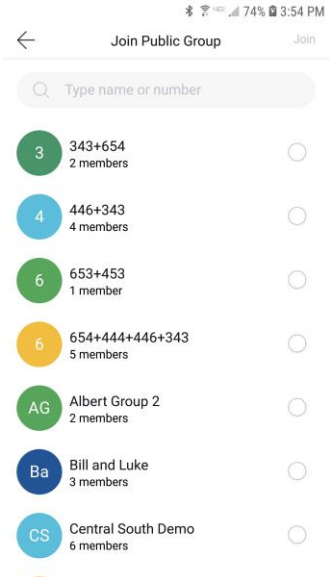


- Tap Create Group

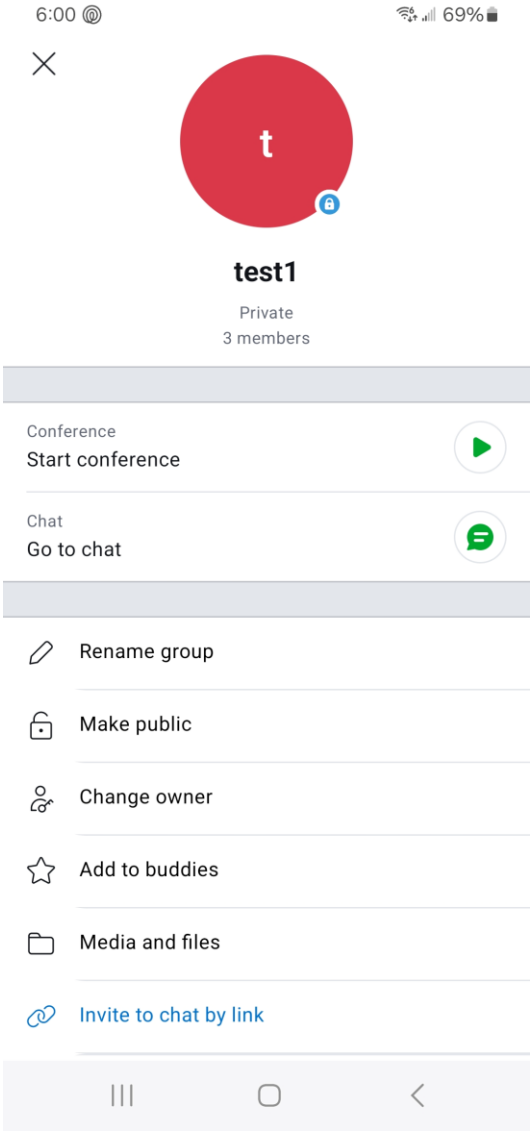




- Tap Join Public Group:



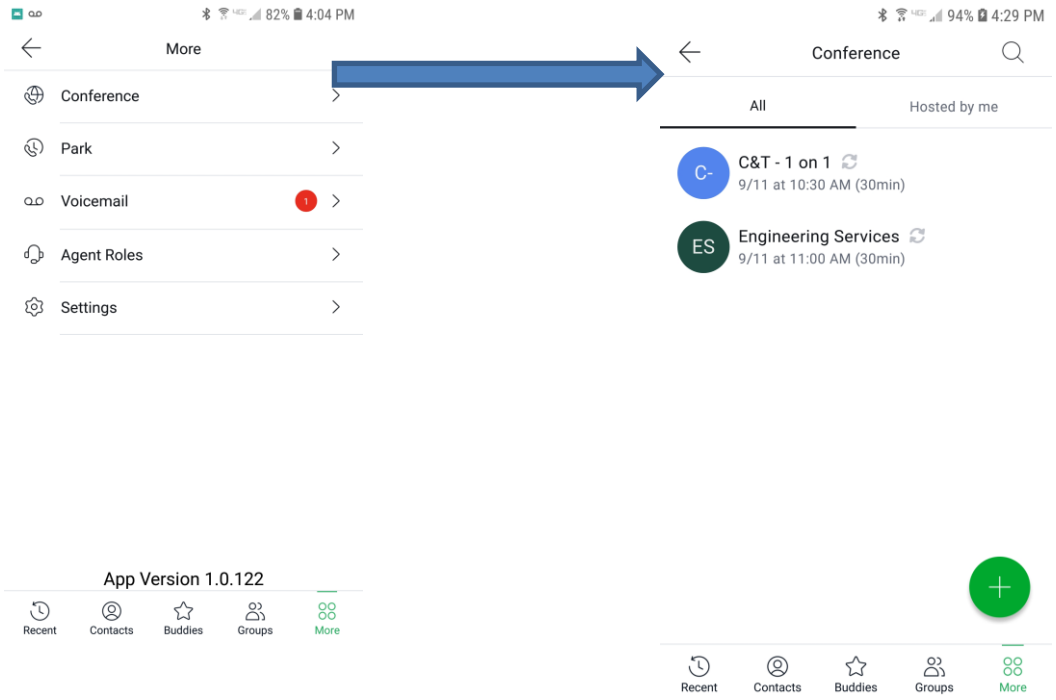
- Tap a group in the list and then tap the group icon to present the Group options screen.

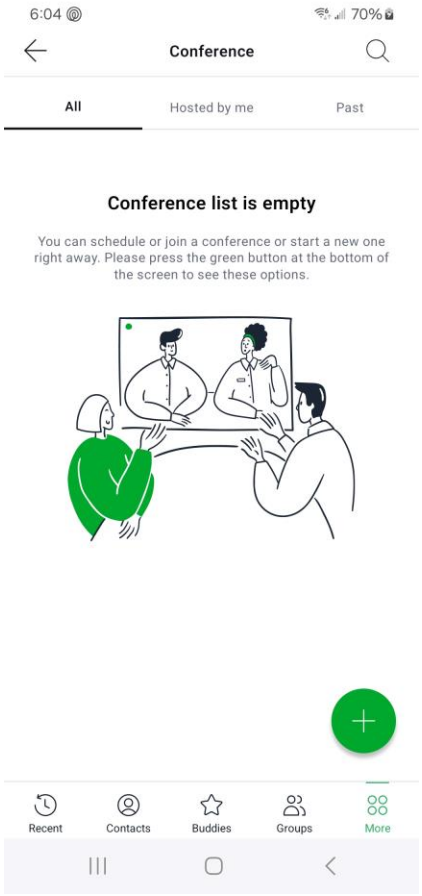

6:00
69%
t
test1
Private
3 members
Conference
Start conference
Chat
Go to chat
Rename group
Make public
Change owner
Add to buddies
Media and files
Invite to chat by link

8 More - Conference

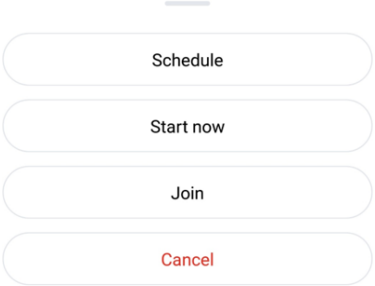
The Conference area displays all Conferences available in the system. This area also allows the creation and management of Conferences.
The main screen will display a list of All Conferences configured or the empty list.

- Tap the More icon and then tap the Conference icon:





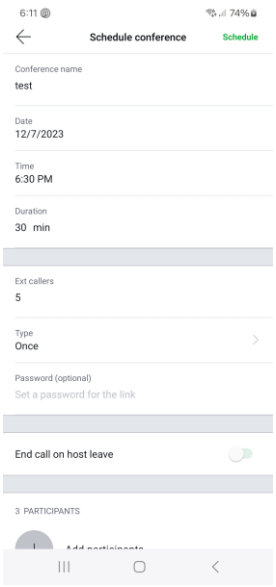
- Tap the icon to view group options



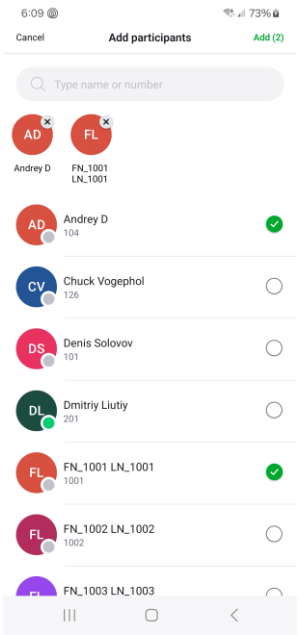
8.1.1 Schedule

To schedule a conference call

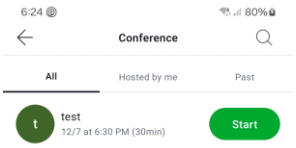
- Tap Schedule. Enter the conference information.

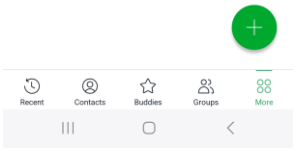


- Adding participants

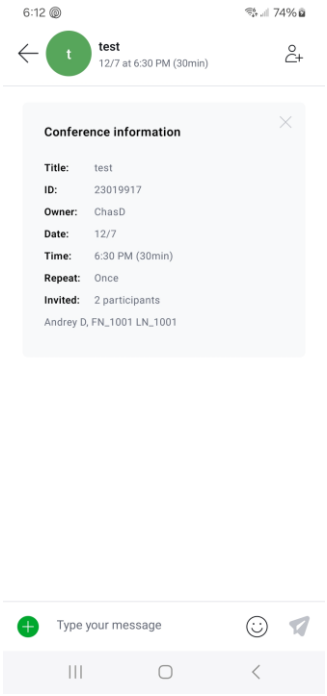


- Click Schedule in the upper right corner. The conference will appear in the conference list.





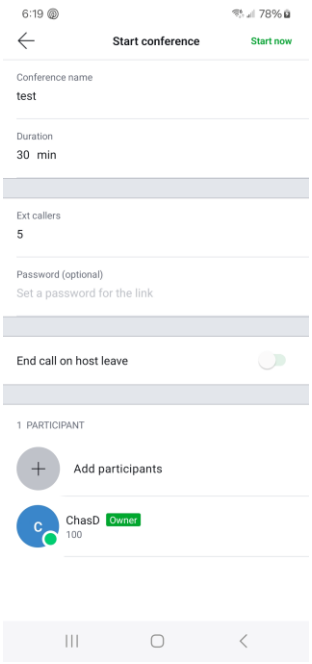
- Tap the conference to view the invitation

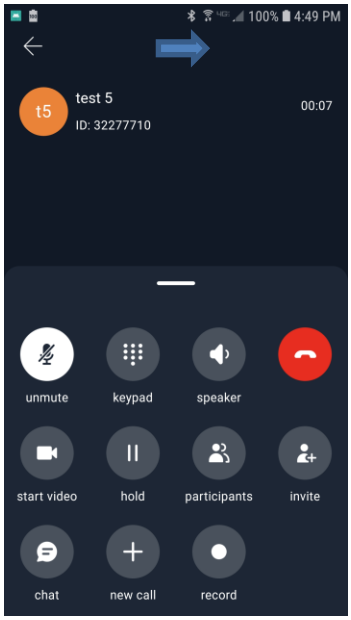


8.1.2 Start now

- Tap the Start now option

- Enter the desired conference information.
- Click Start now in the upper right corner to immediately start the conference.

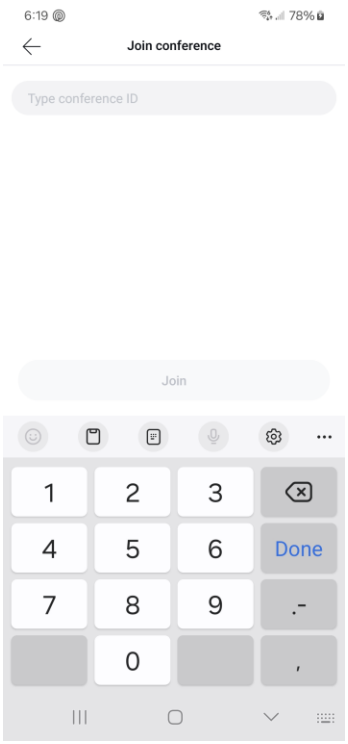




8.1.3 Join

- Tap the Join icon
- Enter the conference ID of the conference to join.

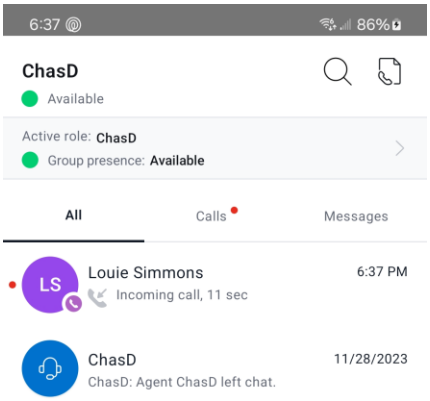
- Click Done

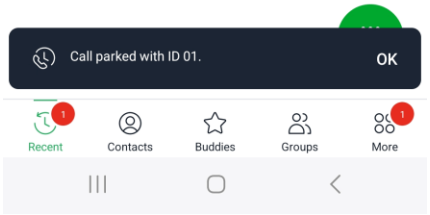

6:19
78%
Join conference
Type conference ID
Join
1
2
3
4
5
6
Done
7
8
9
.-
0
,

9 More – Park

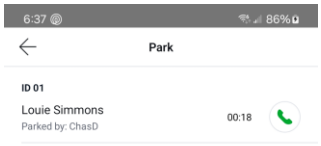
This area is where calls that are placed in park are handled. The user may place and retrieve a call in park or may retrieve a call another user has placed in park.

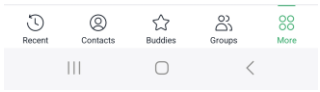
- Tap the Park button to place the call in park. The application will present a confirmation.



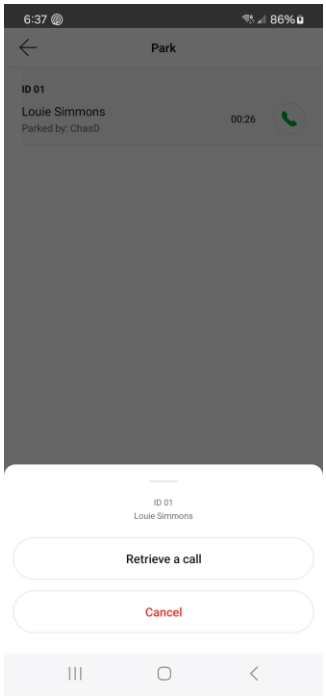


- Tap more-Park to access the park list.





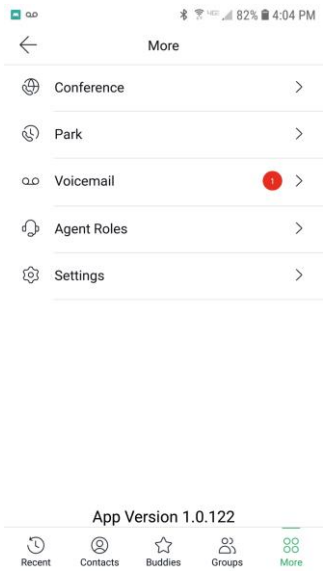
- Tap the handset icon and then Retrieve a call.



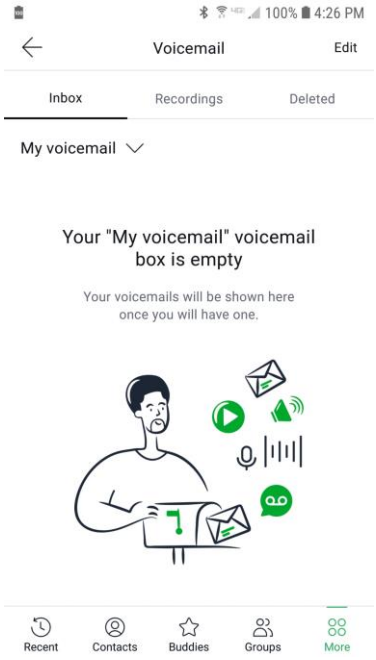
10 More - Voicemail

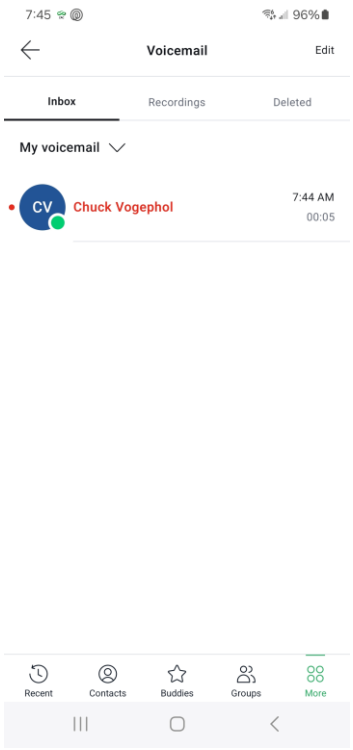
The Voicemail area displays all voicemails that are in your mailbox as well as notifications. This area also allows configuration functions of your mailbox.

- Tap the More icon then tap Voicemail:

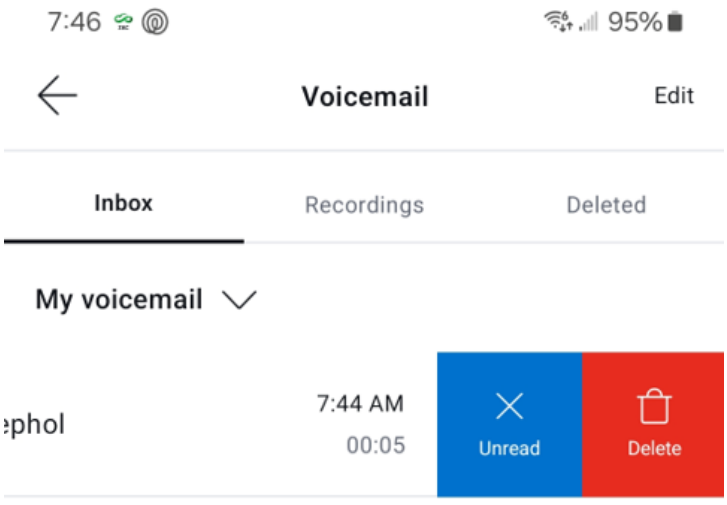


The main screen will display a list of All voicemails in your mailbox or the empty display.

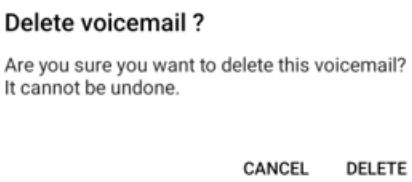




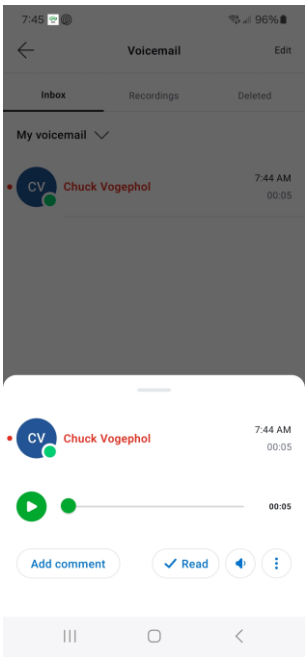
- Swipe left to access quick options for the voicemail. Mark read/unread or delete.



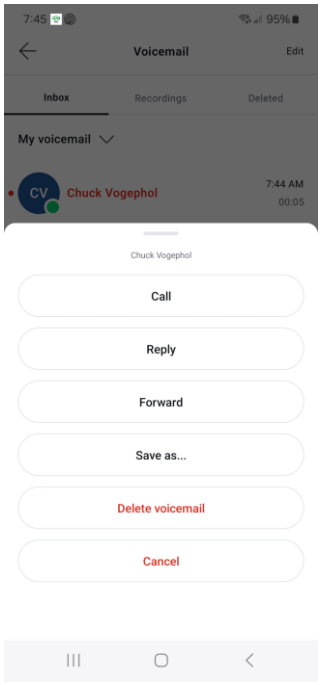
Deleting the voicemail will present a confirmation prompt prior to deletion.



- Tap the voicemail to open.



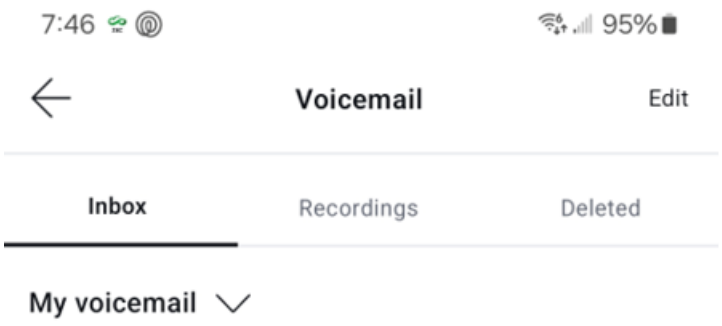
- Tap the more icon with the voicemail open to display available options.

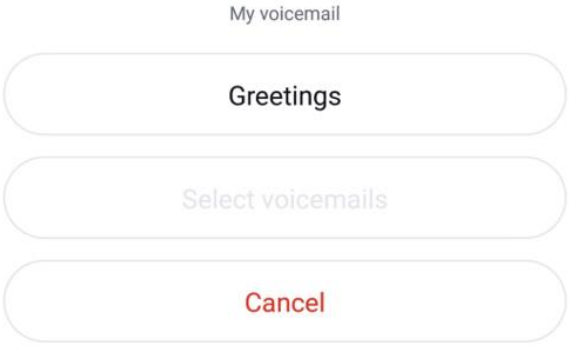


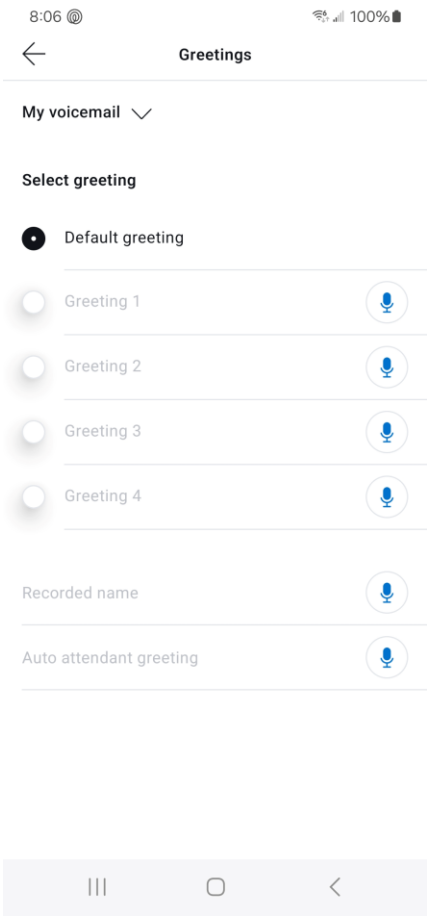
10.1.1 Edit

This area provides access to manage voicemail greetings.

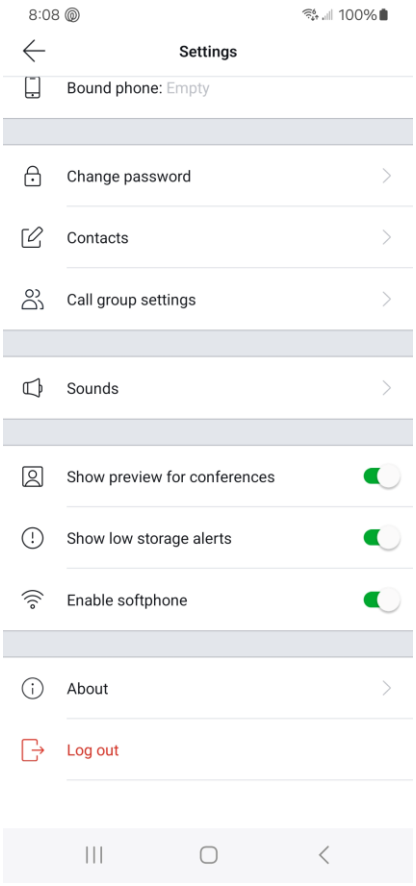
- Tap the Edit icon.




My voicemail
Greetings
Select voicemails
Cancel


8:06
100%
Greetings
My voicemail
Select greeting
Default greeting
Greeting 1
Greeting 2
Greeting 3
Greeting 4
Recorded name
Auto attendant greeting

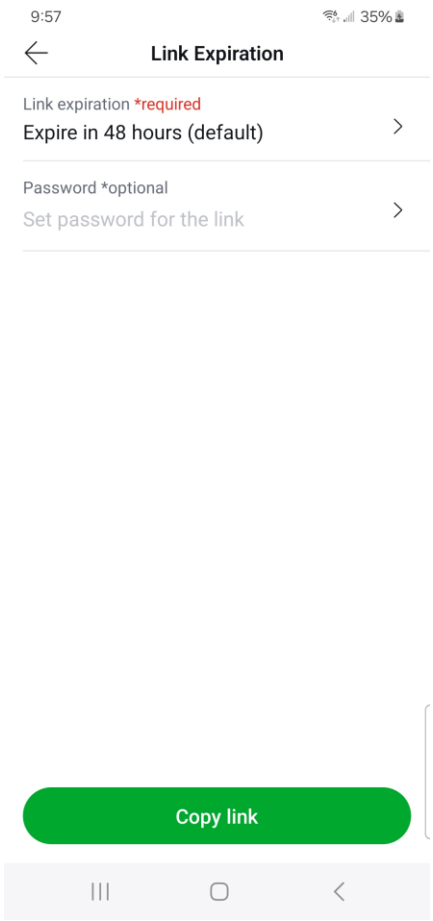
11 More - Settings



11.1 Invite to chat by link

Creates an external link that can be sent to external guests to join a collaboration session.

- Tap Invite to chat by link.
- Select the desired expiration time.
- Enter a password (optional)
- Select Copy Link and the link will be copied to the clipboard.



You may now email or send the link via chat/SMS to other users. They will join as a Guest and you may collaborate with them during the session.

12 New Features version 1.1

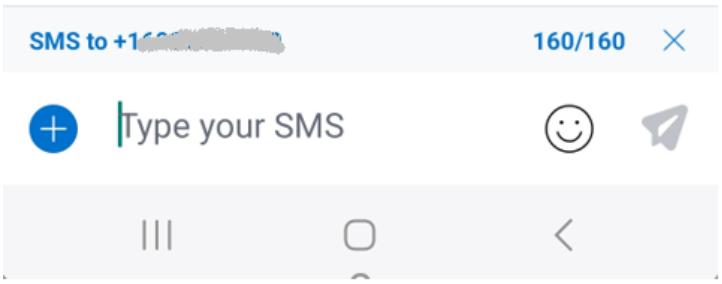
This section describes the new features added with the version 1.1 maintenance release.

12.1 MMS

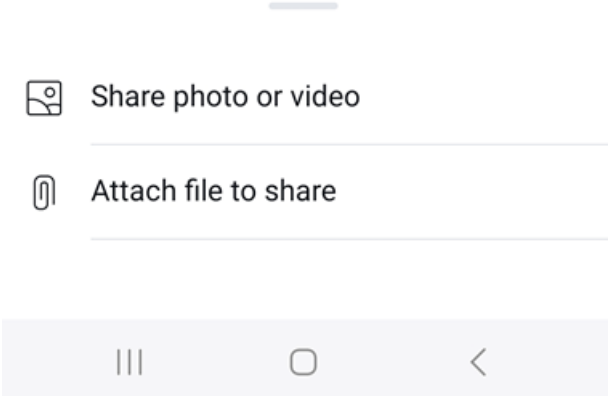
This functionality allows the Mobile ZAC user to attach media files when they send an SMS message to an external user.

12.1.1 Operation

- Tap the ⊕ at the SMS message screen.

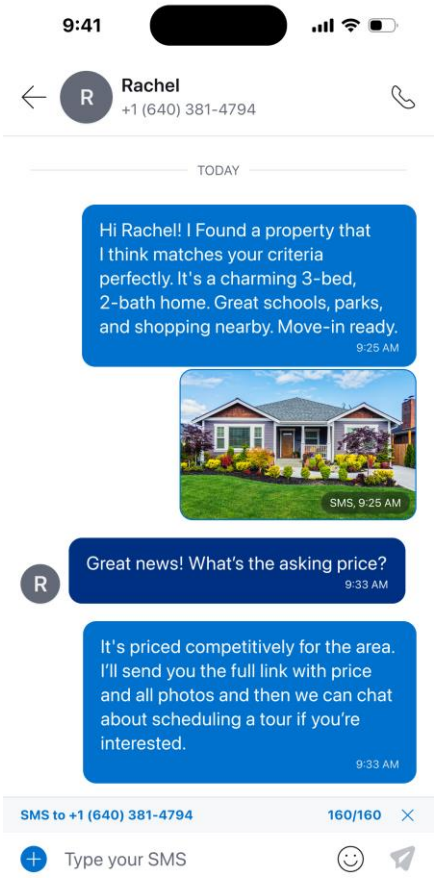


- Select photo/video or attach file.



-

- Tap Send when finished.

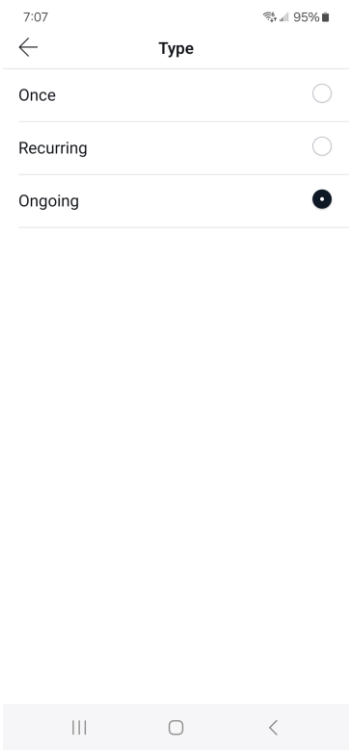


12.2 Conference Improvements

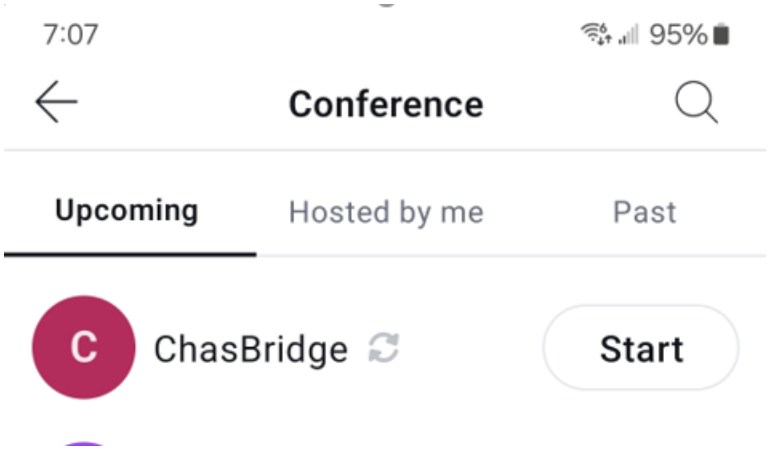
12.2.1 Ongoing Type

The ongoing conference feature has been added to Mobile ZAC allowing users to create a personal conference that has a persistent conference ID. This conference type can be started on the fly or be included in an email invitation for a scheduled conference.

- When scheduling a conference, select the Ongoing type at the Type field selection and then save the conference.

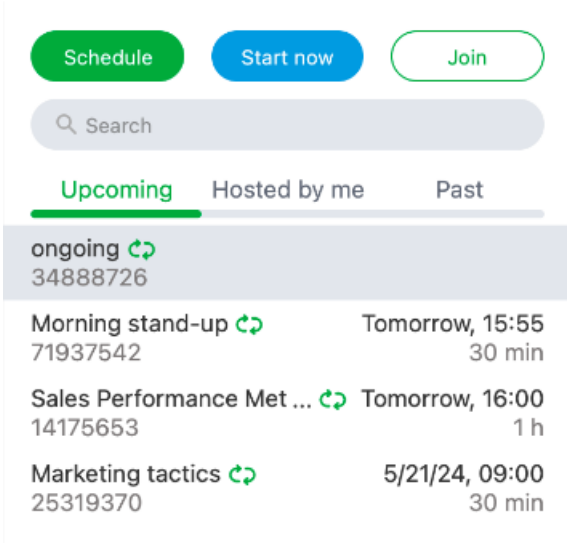


The ongoing type will appear in the conference list:



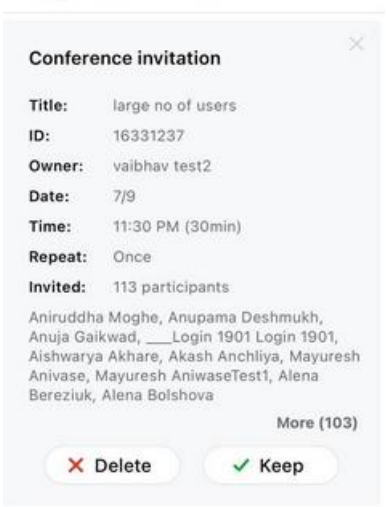
12.2.2 Conference List

The list screen now reflects Upcoming in the conference list.



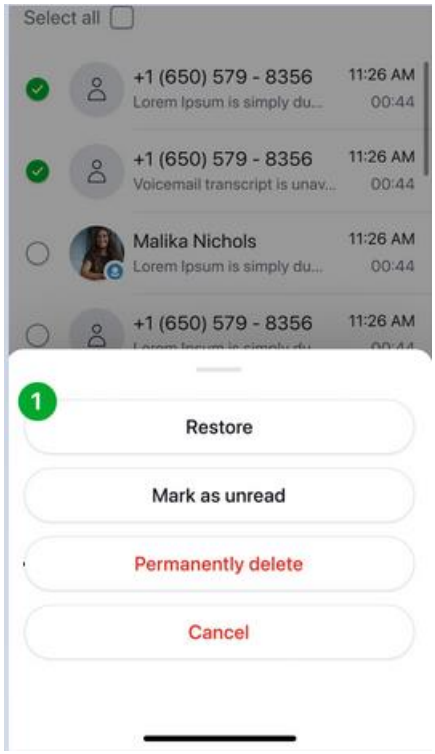
12.2.3 Keep/Delete conferences

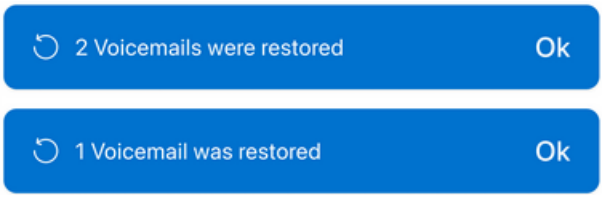
Users now have Keep/Delete options for past conferences description on chat



12.3 Voicemail Improvements

12.3.1 Restore deleted voicemails





12.4 Miscellaneous Improvements

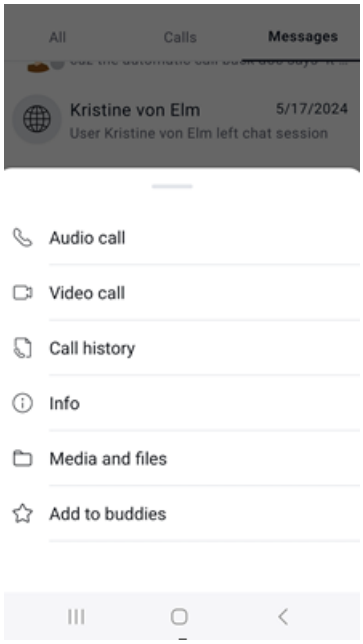
12.4.1 Self-video window

The self-video preview is displayed & Expand view is now displayed on right side.

12.4.2 Recents Call History improvement

The More option when swiping on an entry now reveals an enhanced More option icon. This option displays detailed actions that can be taken for the selected entity type.

- Swipe left on any of the entries from Recent screen.
- Tap on the 'More' option.



Note that the actions that are presented will vary based on the type of entry selected (internal user, external users, etc.)

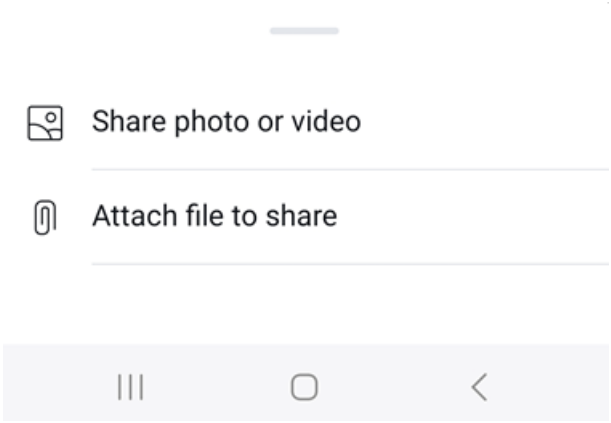
12.4.3 Show call history for Agent Groups in contact screen

Users are now able to see Call history for Agent Groups after tapping on an Agent Group entry from 'Recent'. The information is presented in a new screen.

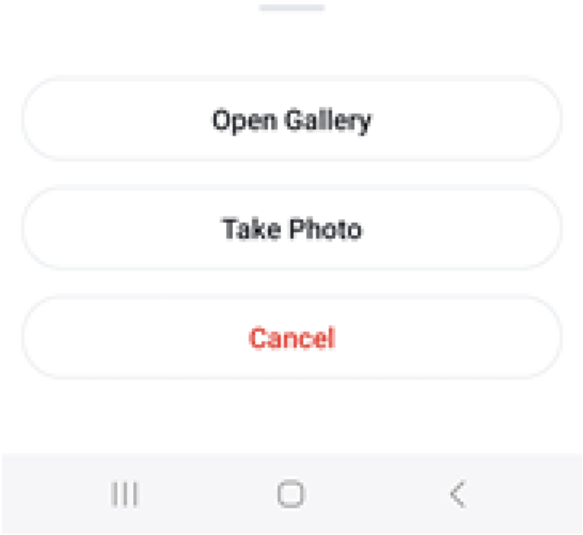
12.4.4 Take Photo option

Users may select the option to take a photo when they send a message.

- Tap the ⊕ at the message screen.



- Tap Share phot or video.

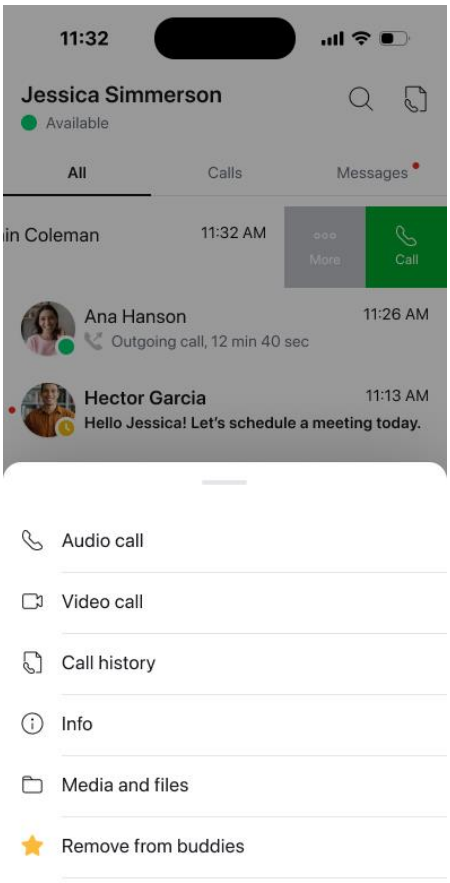


- Tap Take Photo.

12.4.5 More option for Recent

Added swipe functionality for entries in the Recents table. Swipe reveals actions, including a "More" option to display a detailed action card tailored to the entity type (MX users, chat groups, and conference records).

- Swipe left
- Tap More



- Available actions in the more screen will differ based on the entry type selected.

13 New Features Mobile ZAC version 1.2

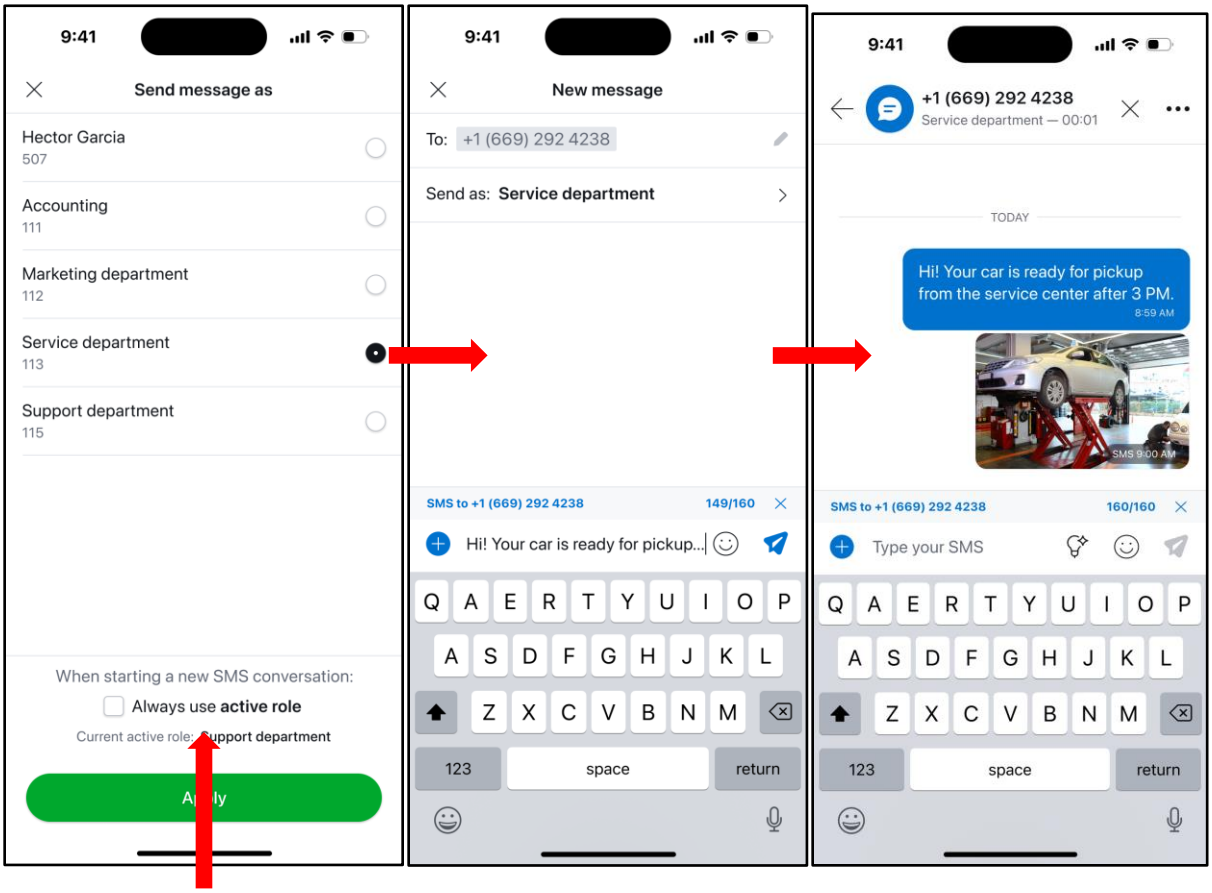
13.1 SMS Outbound Agent Role

Agents of call Operator, ACD, and ICC call groups can now initiate an outbound SMS in their active agent role. Messages the agent sends can reflect specific call group SMS or DID phone numbers that will be received by the recipient.

Note: This feature requires the MX to be at version 18.2 or greater.

13.1.1 Operation

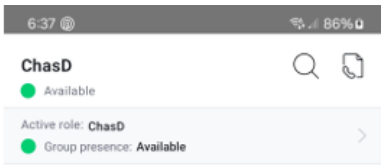
- Start an SMS chat session.
- Select the group role at the Starting a new SMS conversation screen.
- Enter the text and send the message.



Setting "Always use active role" will automatically use the group/user phone number associated with your current active role.

To cancel "Always use active role":

- Tap the Active role title bar



- Tap Active role.
- Uncheck Always use active role
- Tap Apply.

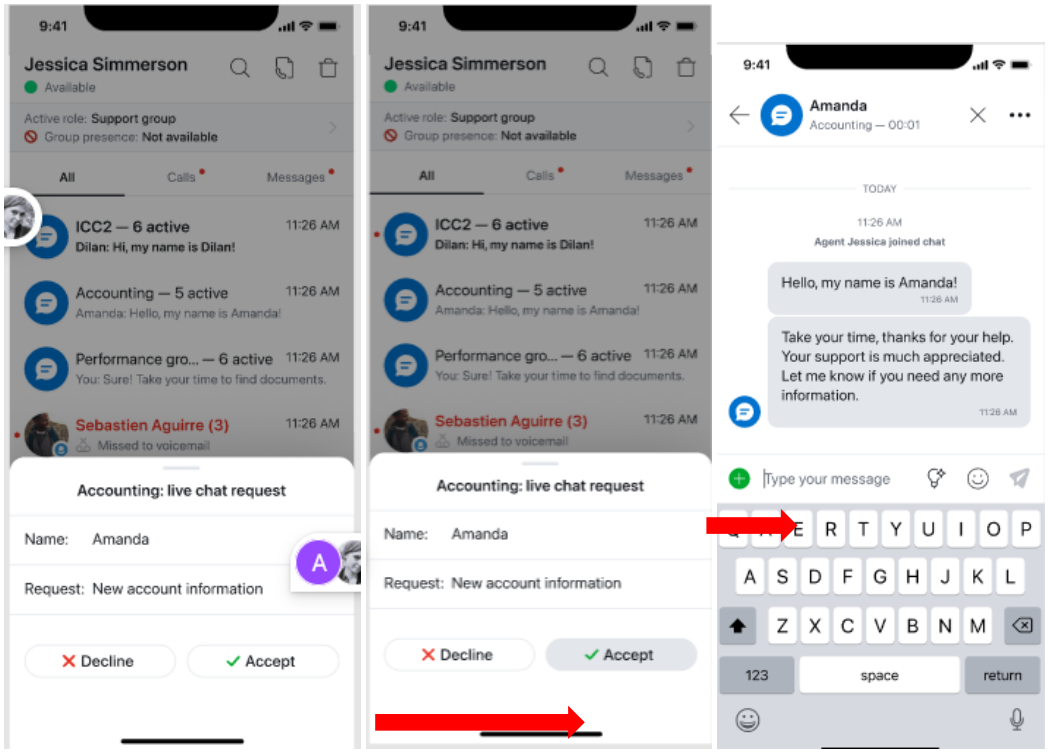
13.2 Webchat

Agents of an ACD, and ICC call groups can now handle webchats from website visitors via the MX Web Chat feature.

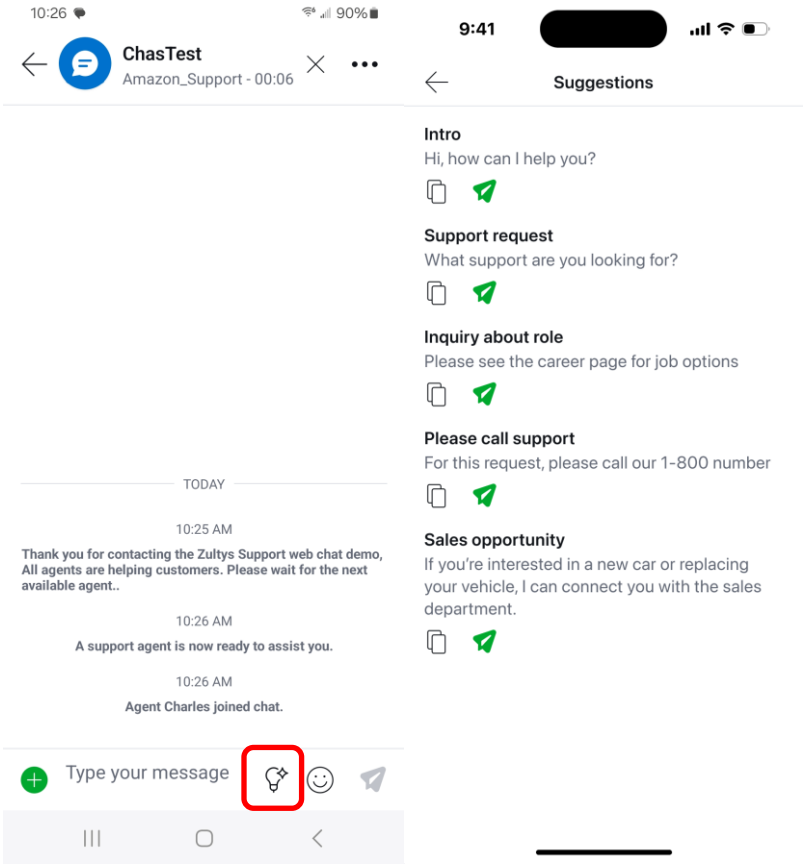
Note: This feature requires the MX to be at version 17.0.10 or greater.

13.2.1 Operation

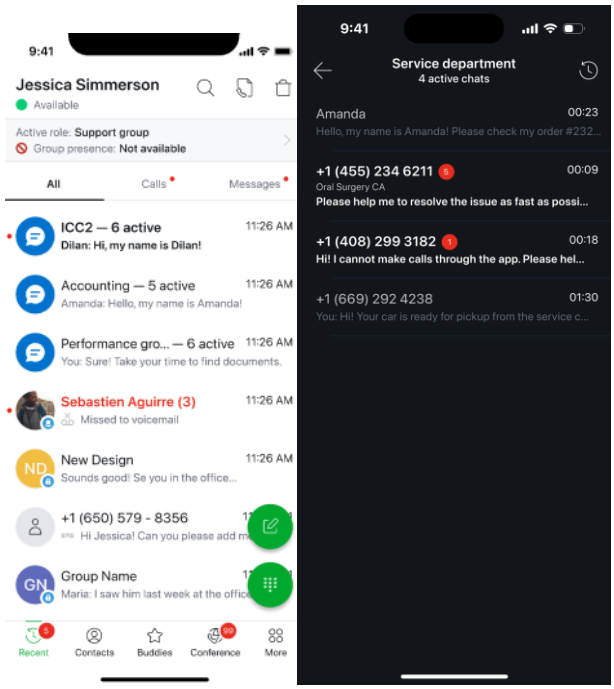
- Agent will receive web chat request via a popup notification.
- Tap Accept to start a chat session with the website visitor. The agent may see some text sent by the web visitor.



- Agents may select and send pre-configured reply suggestions to the web site visitor.
- Tap and hold the message to reply to.
- Tap Reply
- Tap the Suggestions icon to present the pre-configured suggestions
- Tap Send on the suggestion you want to send.



- Agents may view all chat requests by tapping the Recent icon.

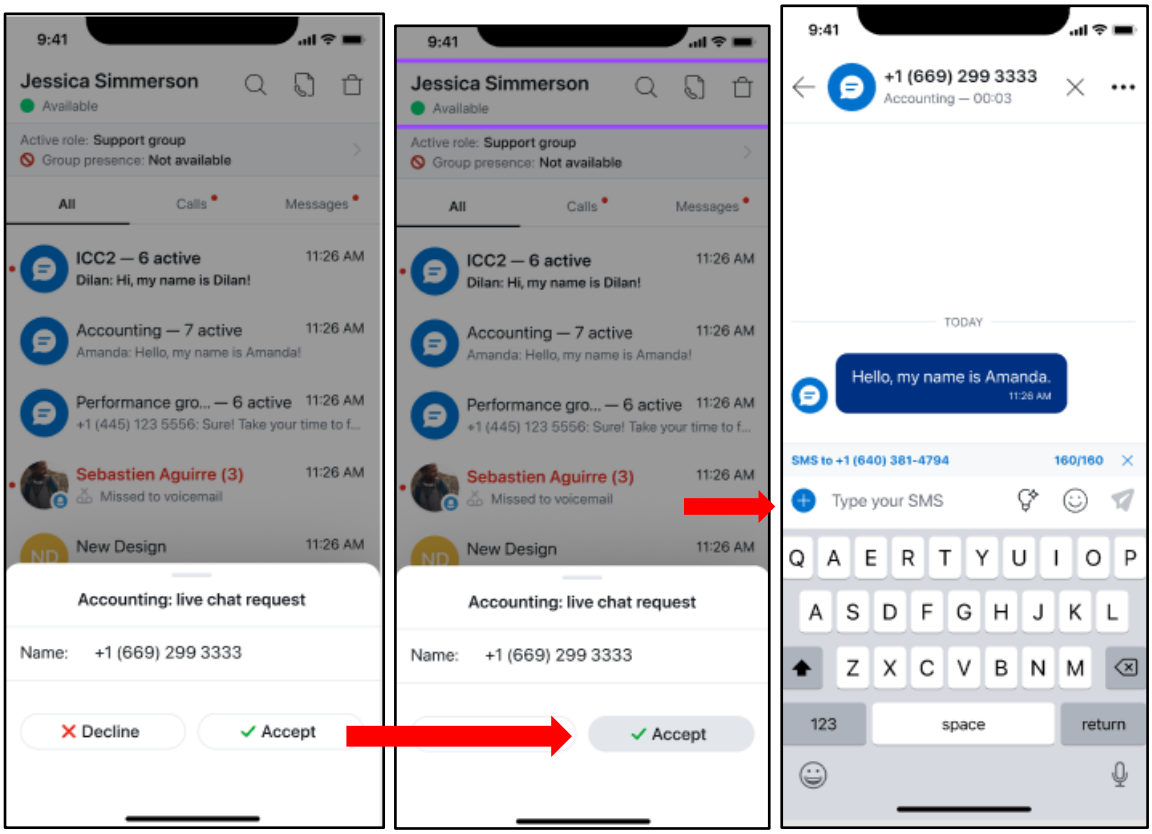


13.3 Incoming SMS to a call group

Note: This feature requires the MX to be at version 18.0.4 or greater.

13.3.1 Operation

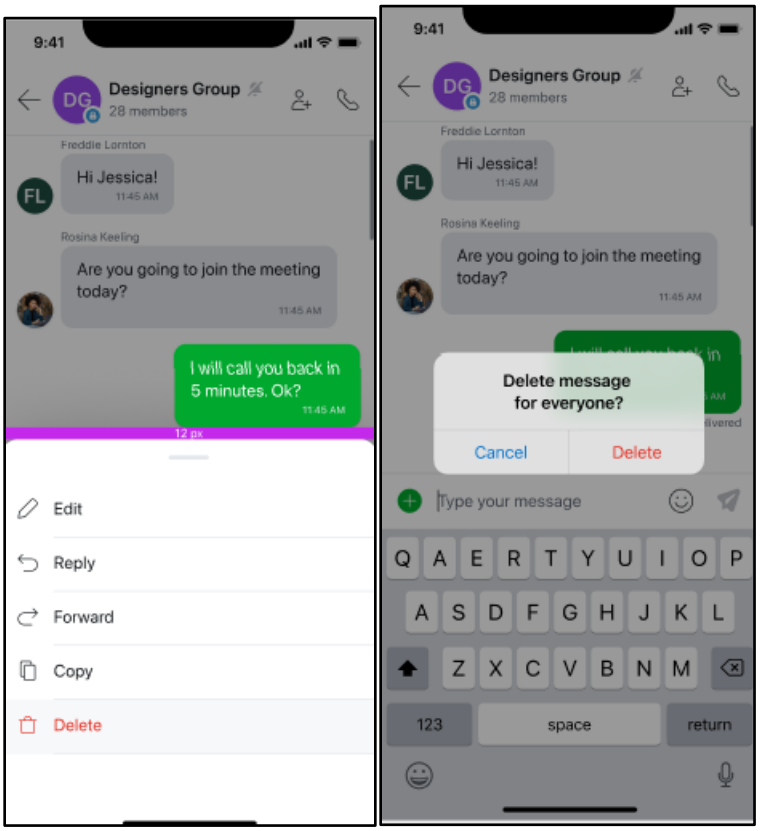
- Agent will receive SMS chat request via a popup notification. The phone number will be displayed.
- Tap Accept to start a chat session with the website visitor.



13.4 Delete

A user may now delete their own message at any time. An owner or administrator of a group or conference may delete another user's message that was in the group/conference.

Note: This feature requires the MX to be at version 18.0.4 or greater.



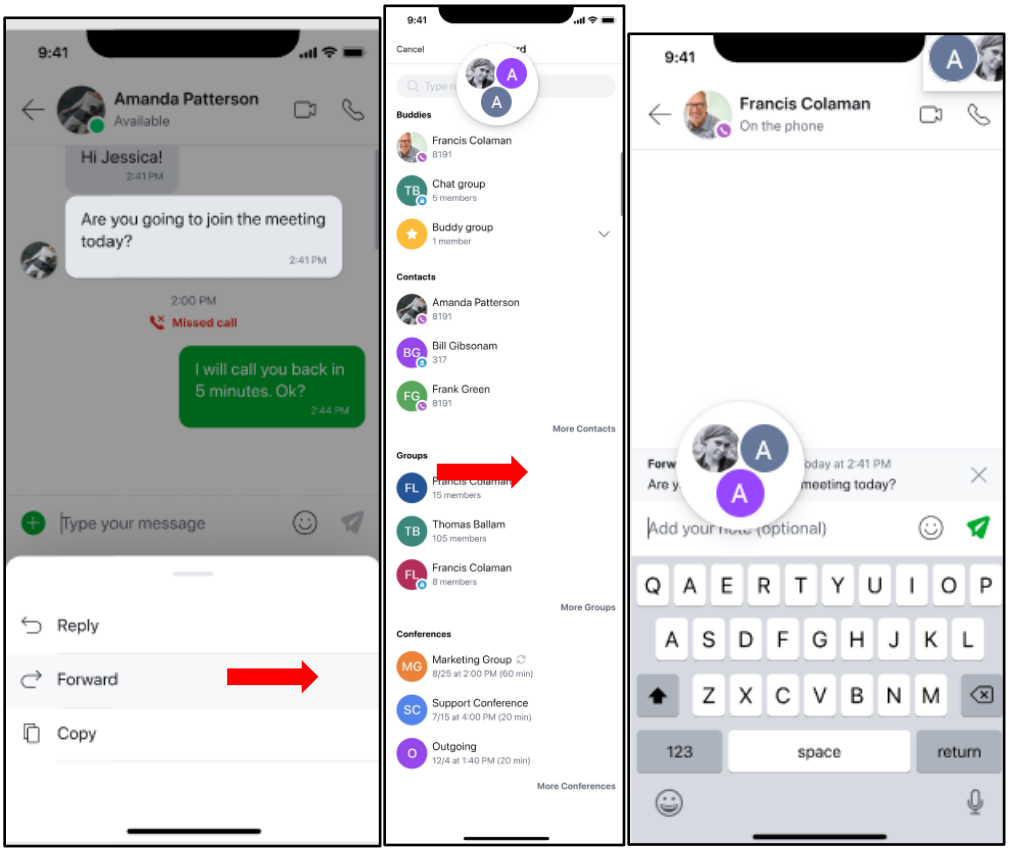
13.5 Forward

A user can forward messages from any conversation in Mobile 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.

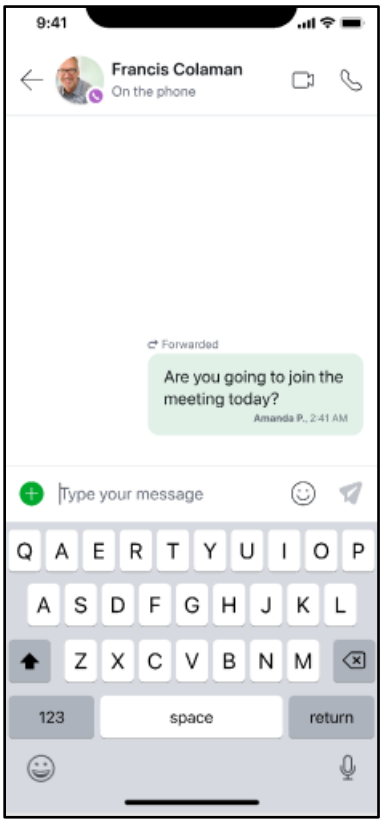
Note: This feature requires the MX to be at version 18.0.4 or greater.

13.5.1 Operation

- Tap and hold on the message to forward.
- Tap Forward.
- Select the user to forward the message to.
- Click Send.



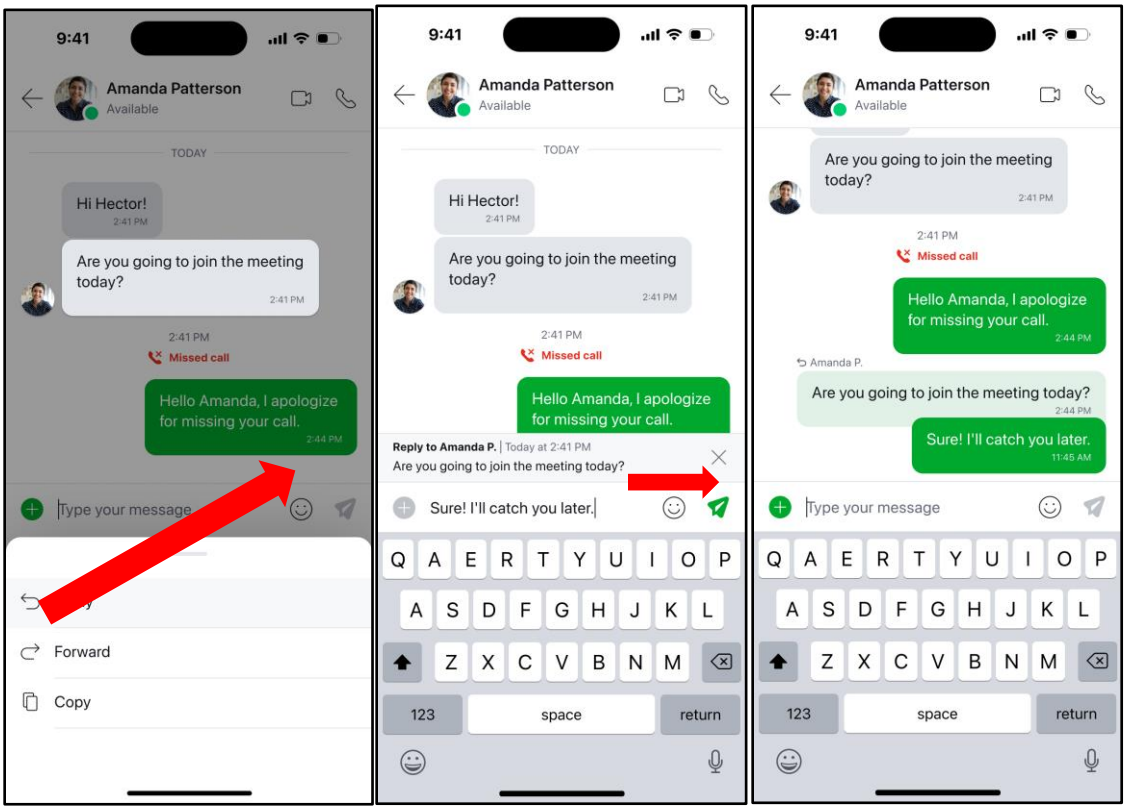
- The recipient will see the forwarded message.



13.6 Reply

A user may reply to someone else's or their own message.

Note: This feature requires the MX to be at version 18.0.4 or greater.

13.6.1 Operation

- Tap and hold on the message to reply.
- Tap Reply.
- Click Send.