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Zultys Advanced Communicator 7.0 – ZAC User Manual

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Revision/Date	Comments
Revision 2 June 2020	Initial Early Access release
Revision 3, July 2020	Initial GA release version
Revision 4/July 2020	Added ports for screenshare feature

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Getting Started

1.1 Description

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

1.2 PC Requirements

- **Version** –Windows 8 (32-bit or 64-bit), Windows 10 (32-bit or 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 (64-bit only)
- **RAM** – 1GB
- **Processor** – 1GHz Intel Core 2 Duo (64-bit)
- **Hard Drive Space** – 400 MB

1.4 Other Requirements

- MX software version 12.0.7 minimum. MX release 16.0.2 is recommended for full functionality
- Security certificate installed on the MX
- MXIE/ZAC license for each user
- MX Administration>Provision>System Settings>Web Services – enable HTTPS.
- Ports 443, 7779 open or mapped if behind firewall (screen sharing/external chat link)
- UDP ports 33000-35000 for screenshare
- Softphone RTP port ranges – 3000-3063
- Outlook version 2010 (or greater) required for Outlook integrations

Note: MXIE and ZAC should not be running at the same time. This may cause unexpected results in operation.

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1.5 What's new in ZAC 7.0

- Call Attached Data (**see Call Attached Data manual**)
  ***requires MX 16.0.2+**
- Agent Web Chat (**see Web Chat manual**)
  ***requires MX 16.0.2+**
- Screen Sharing
  ***requires MX 16.0.2+**
- Invite external user to chat session (user or group chat)
  ***requires MX 16.0.2+**
- Whisper-Monitor-Barge for non-ICC users
  ***requires MX 16.0.2+**
- Fax Cover Page
  ***requires MX 16.0.2+**
- Fax Receipt
  ***requires MX 16.0.2+**
- Multiple delete Fax option
- Import Contacts (.csv, vCard)
- Voicemail Transcription
  ***requires MX 16.0.2+**
- Multiple delete Local contacts
- Transfer call directly to voicemail
- ***requires MX 16.0.2+**
- Fax PDF documents directly from ZAC
- ***requires MX 16.0.2+**

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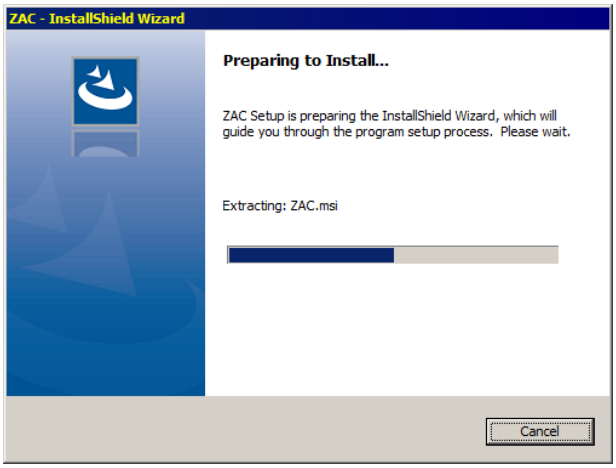
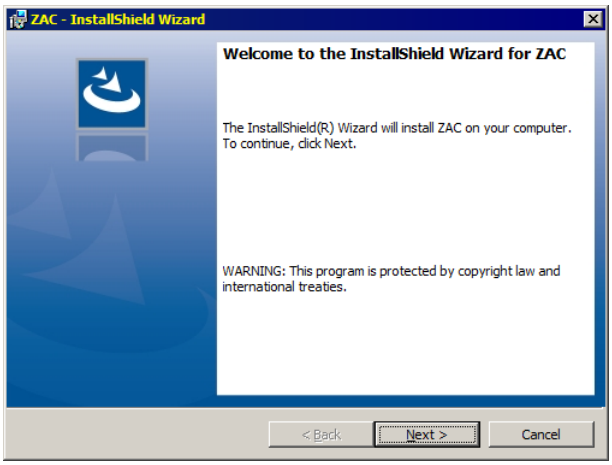
1.6 Installation

1.6.1 PC

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





Click the Next button to continue

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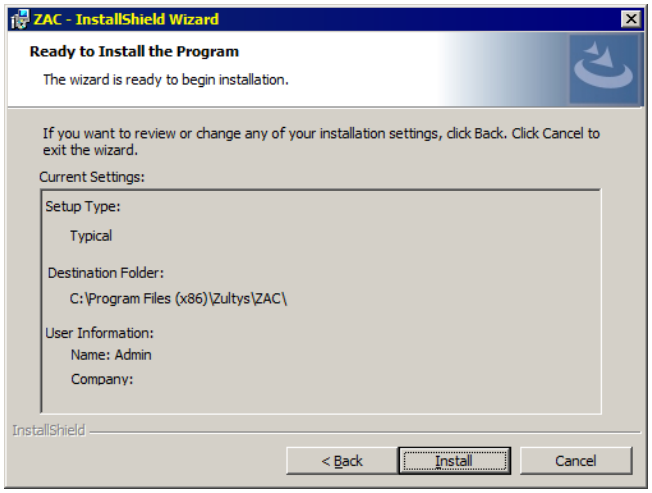
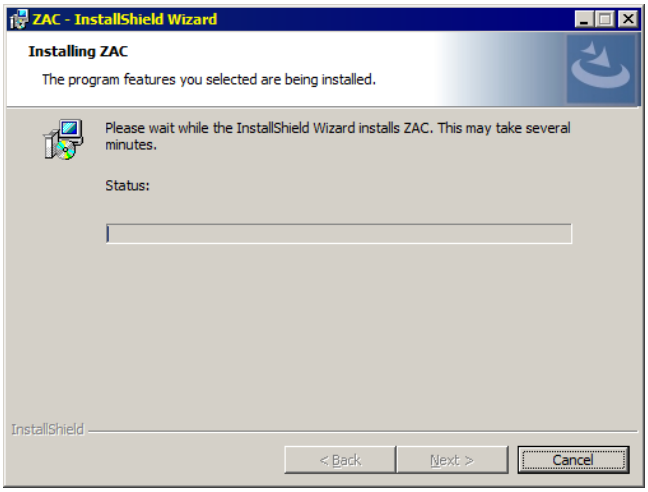


It is recommended to leave the default installation settings.

Click the Install button.



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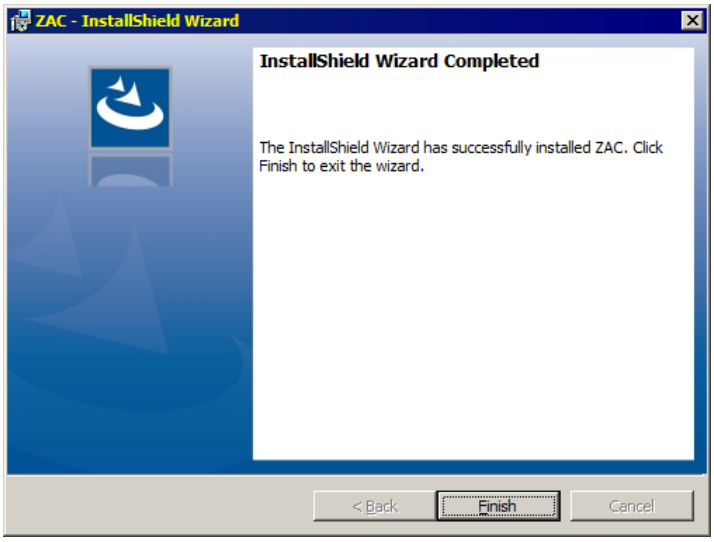

Click the Finish button to completer the installation.

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_x64-7.0.0.47.exe /S /v/qn** "- Install

"**C:\Users\xxxxxxxxxx\Desktop\ZAC_x64-7.0.0.47.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

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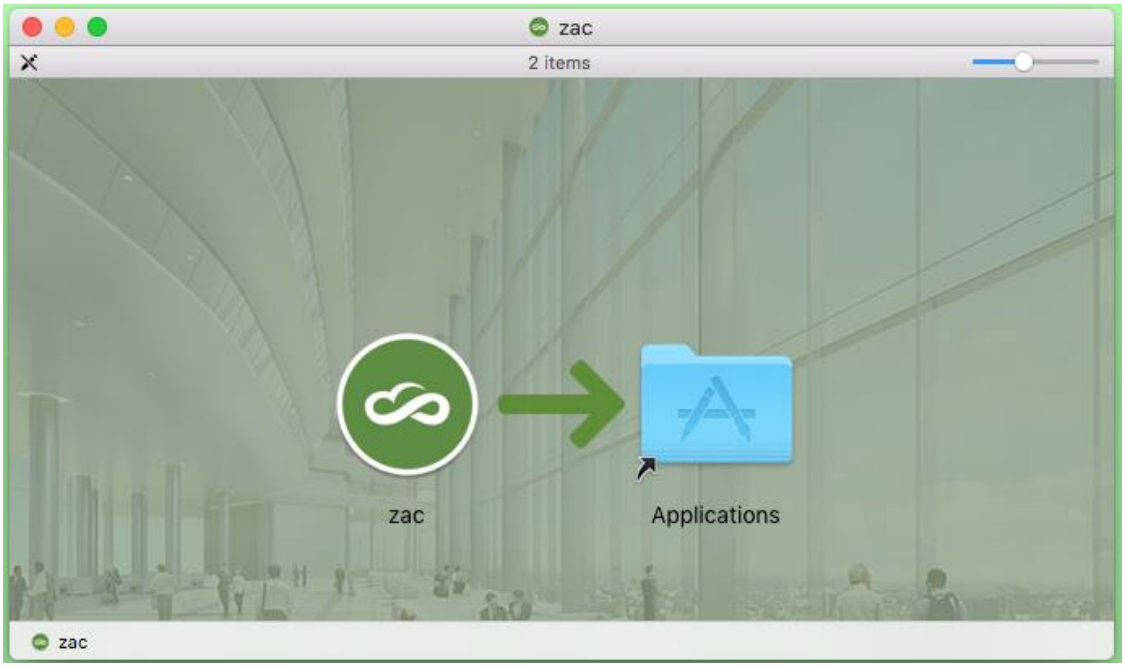

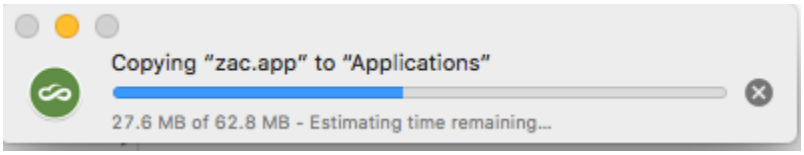

You may then open ZAC from the Applications folder.

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.

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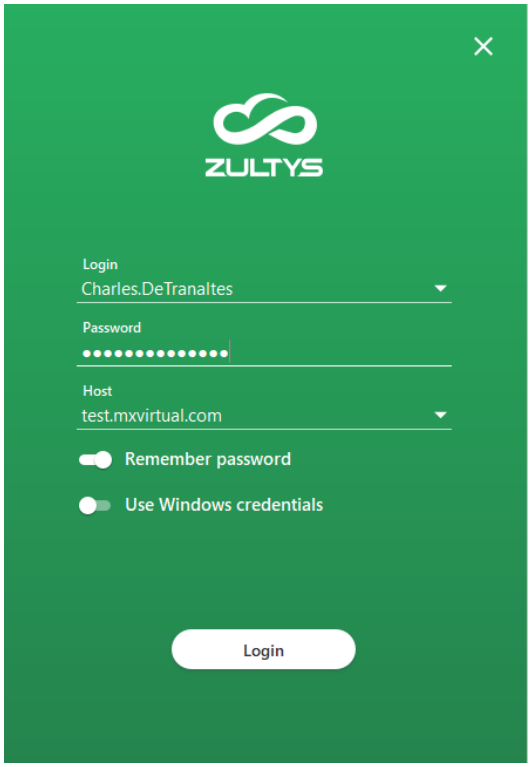
2 Operation

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.

Click Login to proceed

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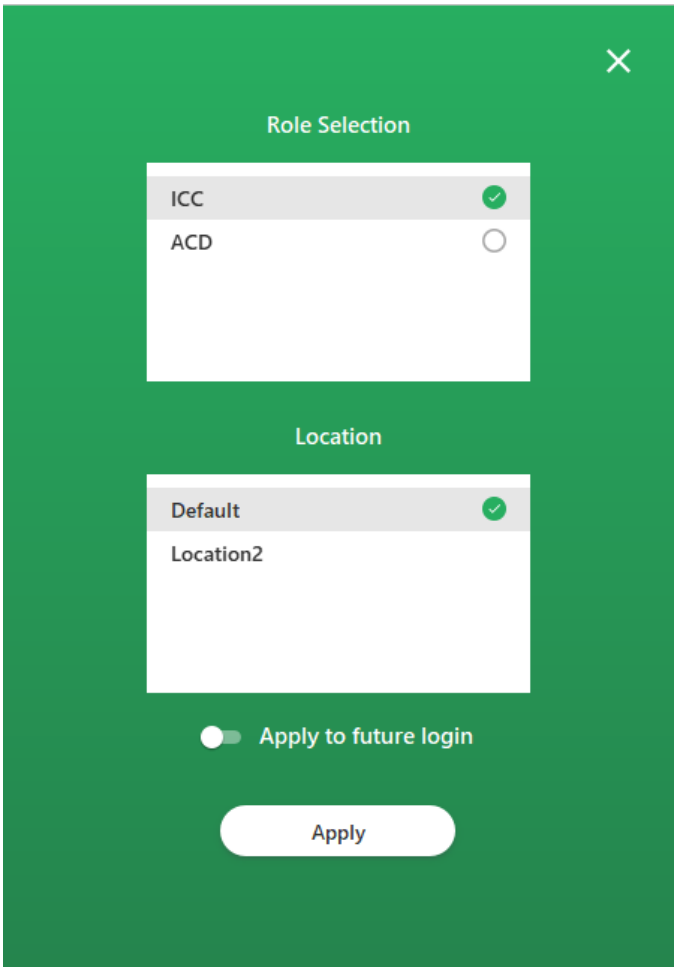
If you are a member of a call group, you will be prompted to select any group role for which you are a member of.

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, click the Apply to future login checkbox.

Click Apply to login to ZAC.

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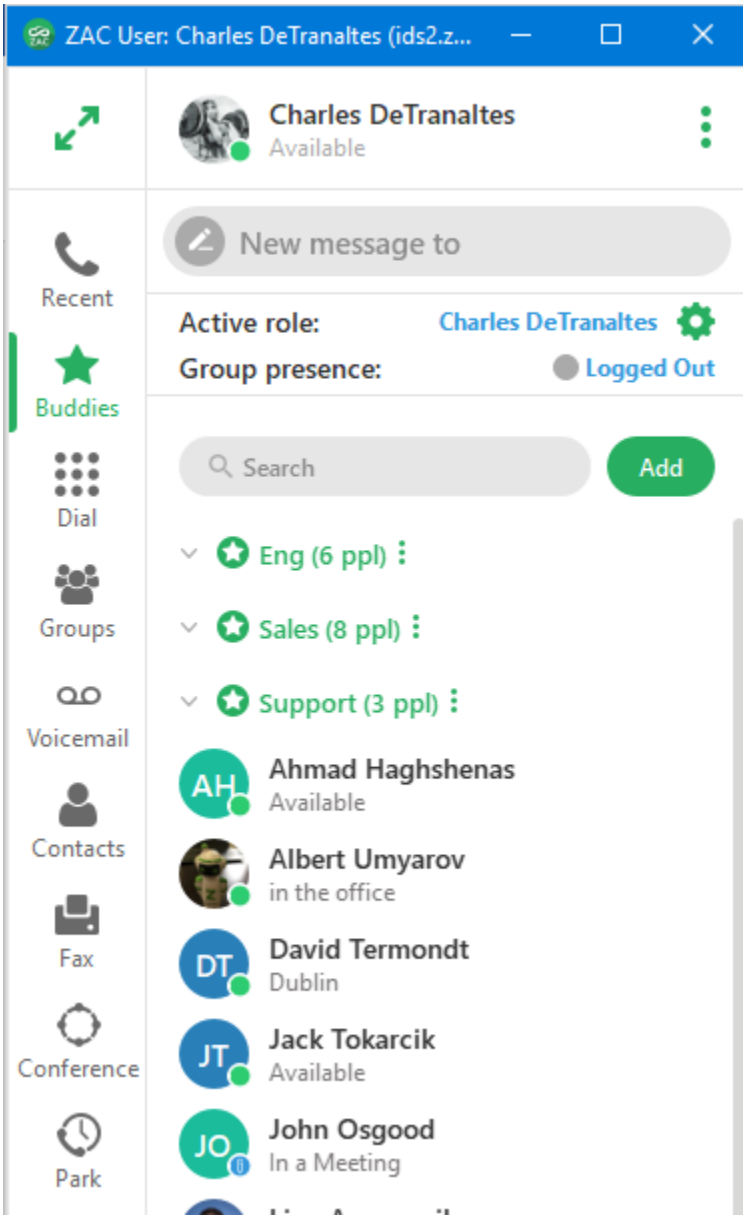
2.2 Main Screen

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



Minimized mode

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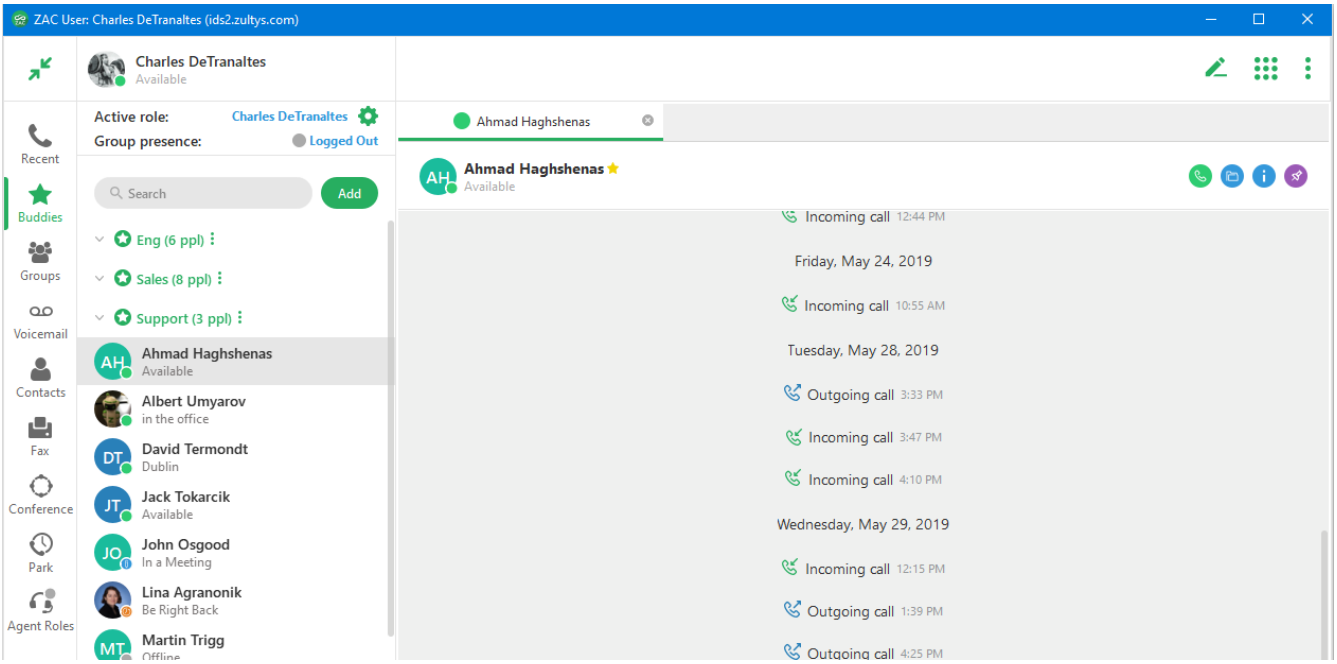
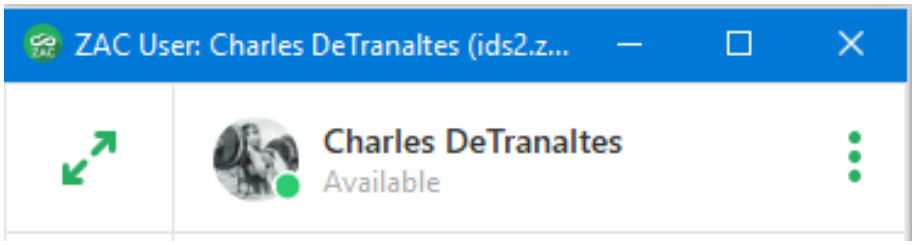


Expanded mode

- 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.

To delete a note remove the note and press ENTER. Or click the x next to the note.

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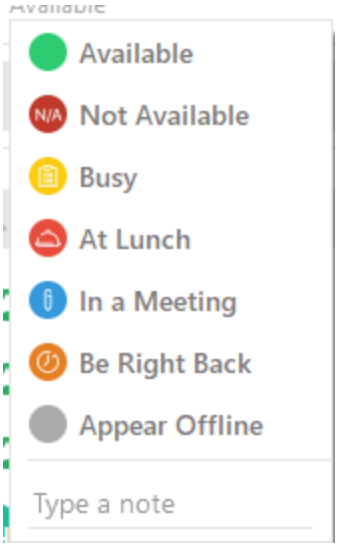
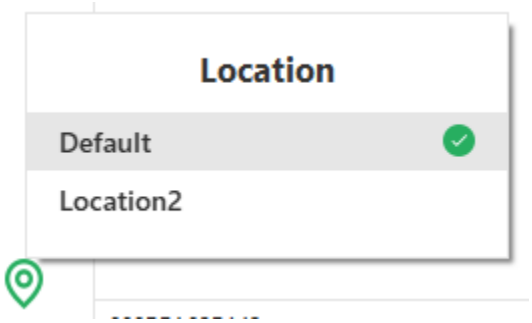


Users who are also logged into Zultys Mobile Communicator will have their presence as well as a mobile phoen indicator displayed.

- Locations

You may select which location you want to be logged into using the locations icon.

Click the location icon and select the desired location.



- User Information/Image

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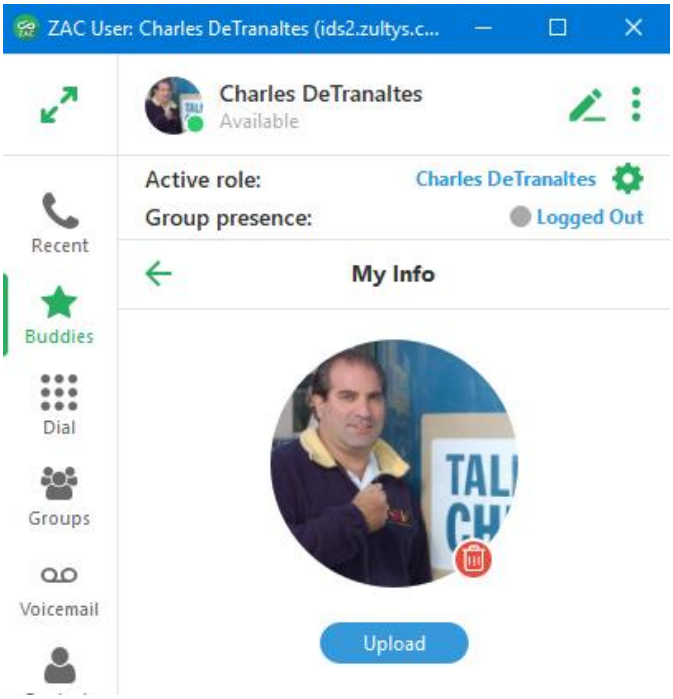
You may add an image that can be associated to you. You may also add/edit your contact information in this area as well.

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.

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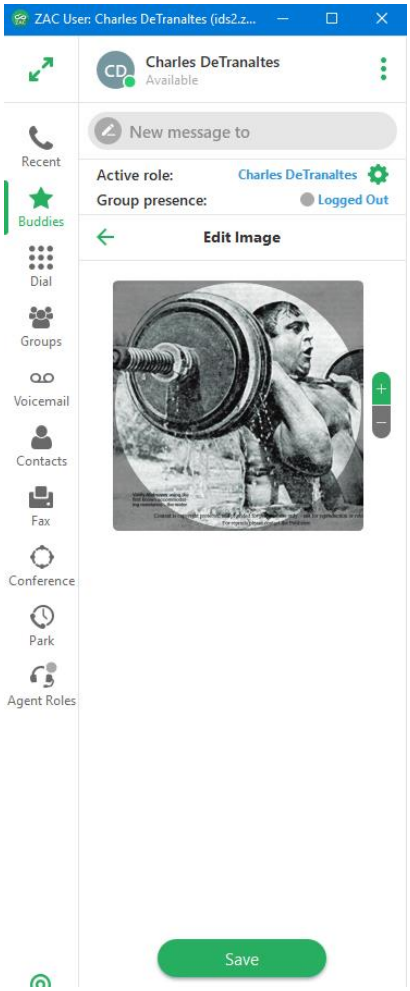

You may size the image using the controls to the right of the image. When you are finished, click Save.

You may edit your contact information:

Full name
Mobile phone
Home phone
e-mail

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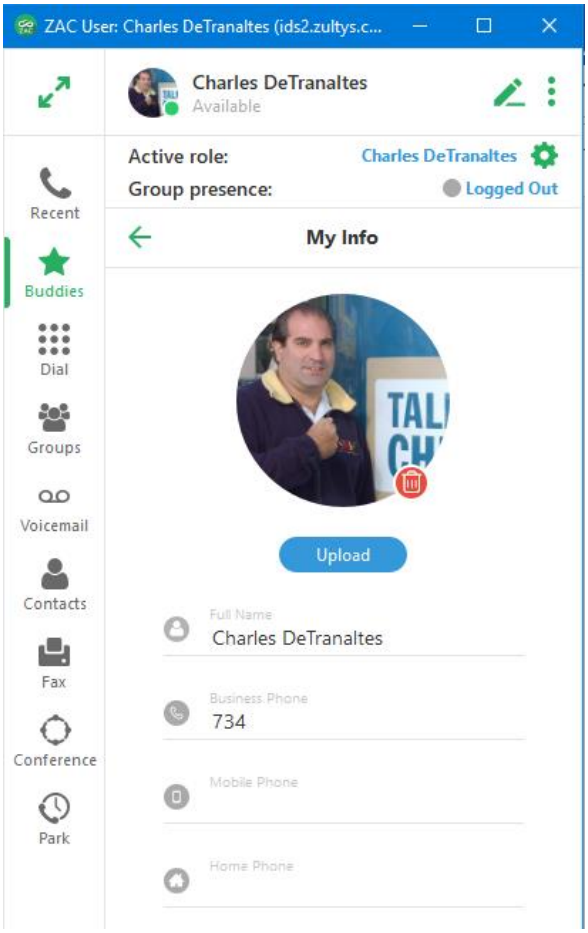
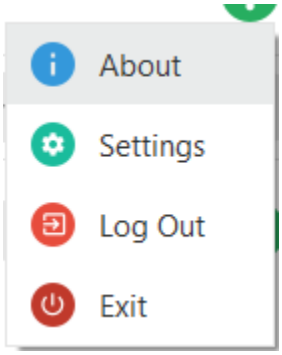


- Option Menu



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.

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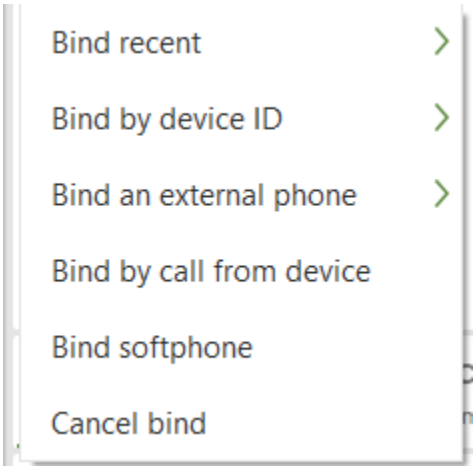
- **About** – Displays the version number of the program
- **Settings** – Provides access to programmable areas that users can customize. See Settings Menu section of this document for more details.
- **Log off** – This will log you out of the program but keep the program open. You must login again to utilize the program.
- **Exit** – This will close the program and log you off of the system.

- Bind Area

ZAC can initiate voice calls and handle multiple voice calls only through SIP devices, external numbers or 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 bind ZAC to a SIP device, internal softphone for PC audio usage, or an external phone number.

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.

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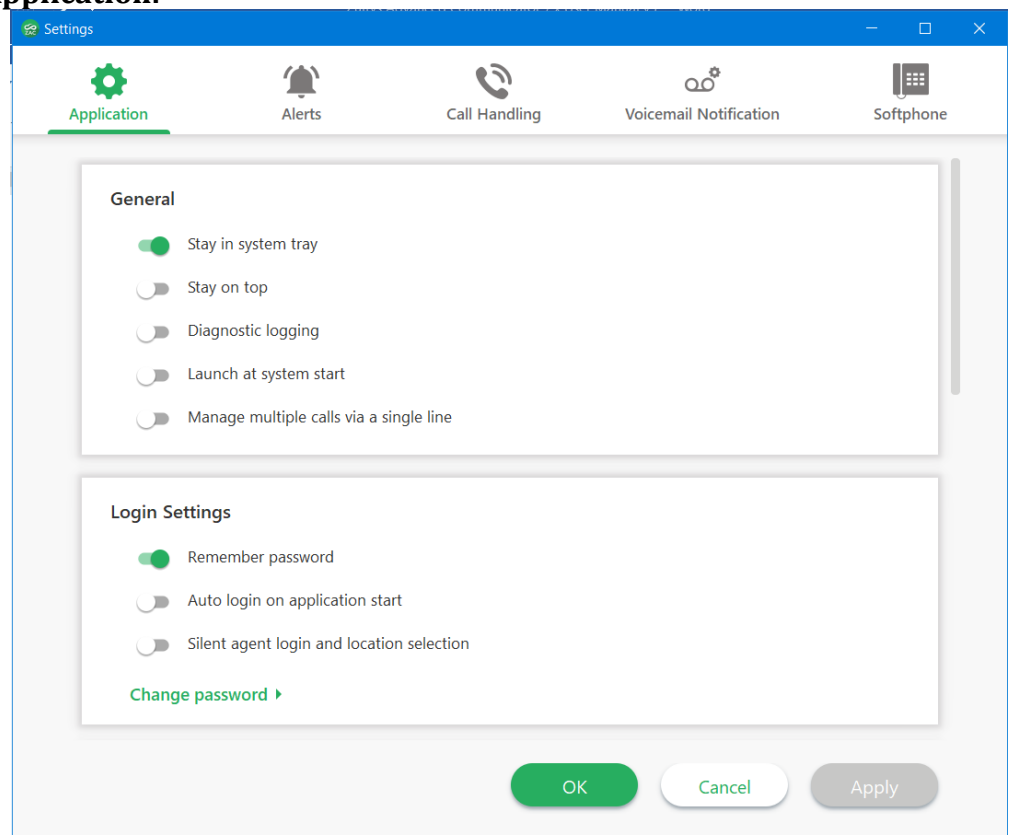
- **Bind to External Phone**: This option allows you to bind to a Cell Phone, Home Phone Line.
- **Bind by call from device**: This option binds your ZAC instance to an MX managed device that you designate by making a voice call.
- **Bind softphone**: This option binds your ZAC instance to the ZAC internal 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 Settings Menu

2.3.1 Application:



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.

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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 – This setting enables sending analytic data to Goggle analytics. Zultys utilizes this data to improve the ZAC program based on actual usage.

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.

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 confirm new passwords.

Integration – This area allows you to select Outlook Contacts (32/64 bit), Microsoft Unified Communications (see section **7**), as well as the settings for the screen dial feature.
If you enable Outlook Contacts, Outlook contacts will display in the Contacts/Imported area.

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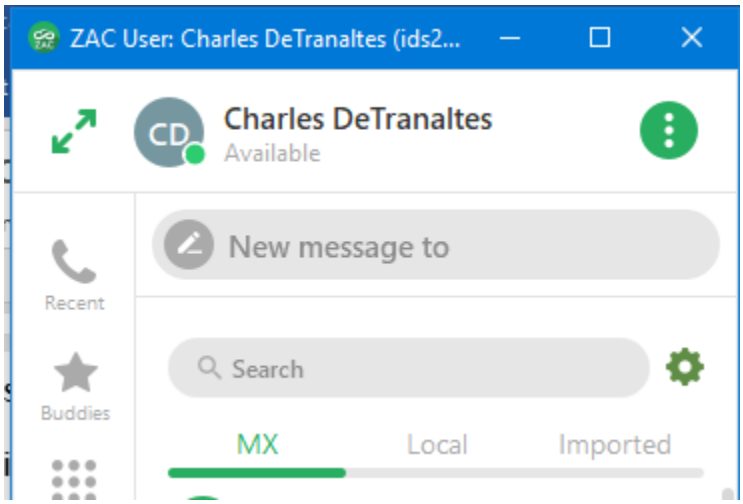
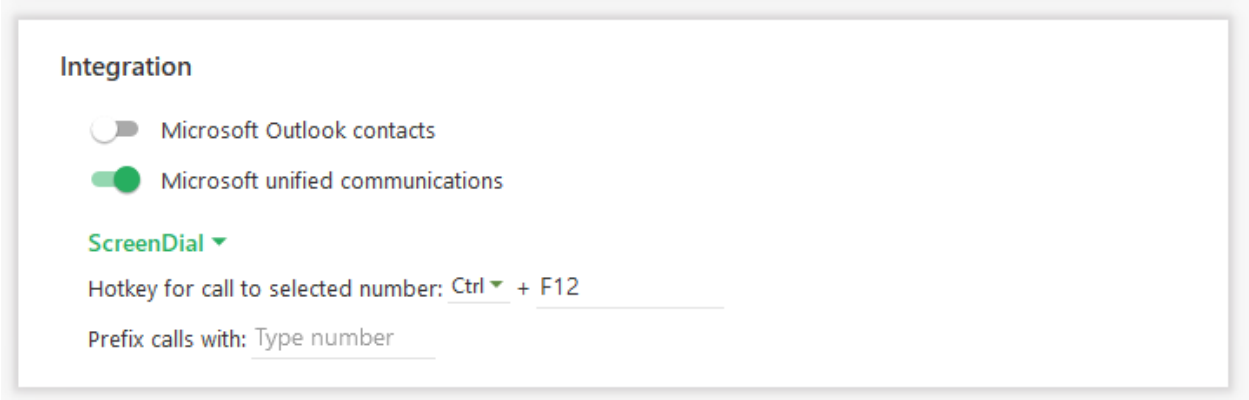
Note: Outlook contact and Unified Communications are supported on Windows version only





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

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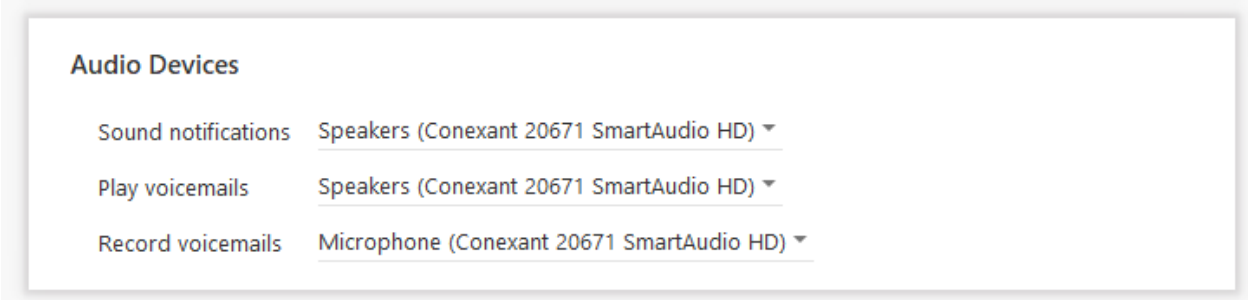
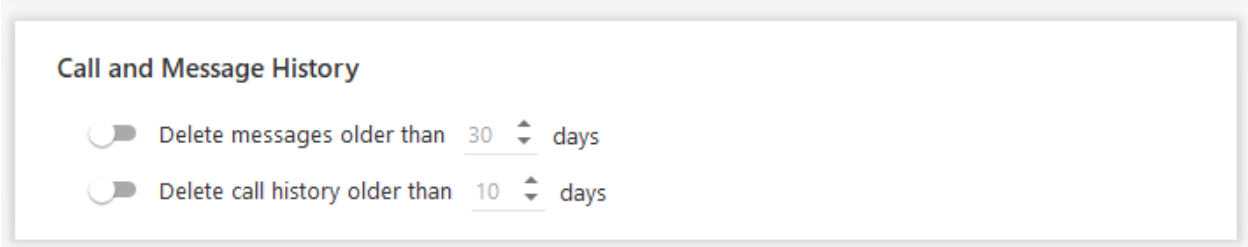
ScreenDial – You may define the hotkey combination that will be used to activate the ScreenDial feature. In addition, you may add a prefix to use with the screen dial feature. This is the number that will be inserted prior to the highlighted screen dial number to be dialed before making the call. By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

Audio devices – This area allows the selection of the audio 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.



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.



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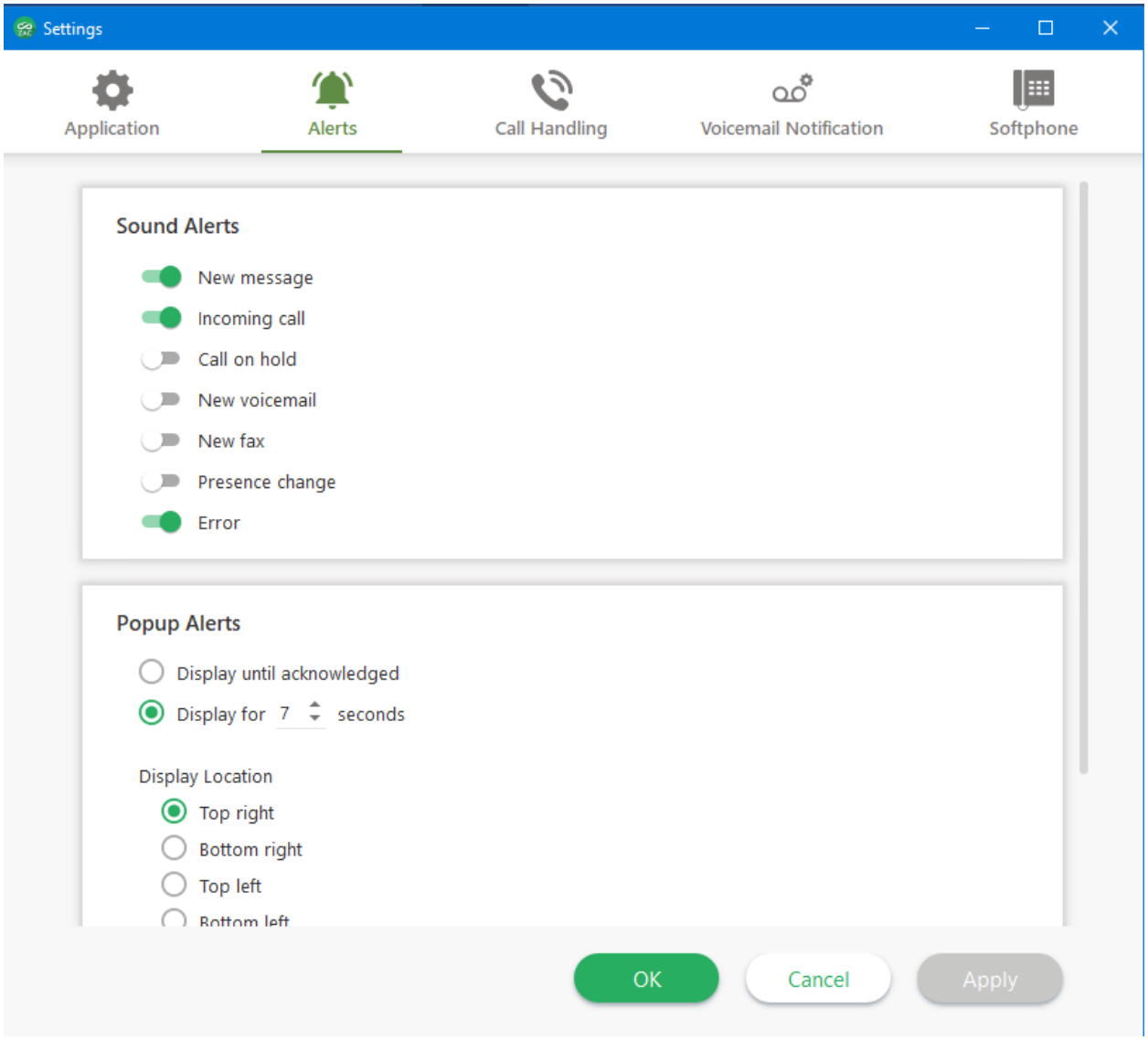
2.3.2 Alerts:



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.

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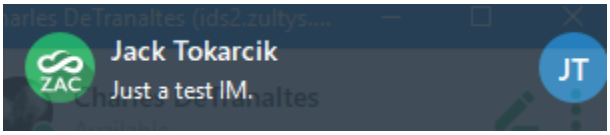
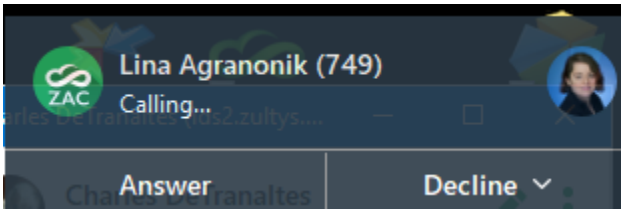
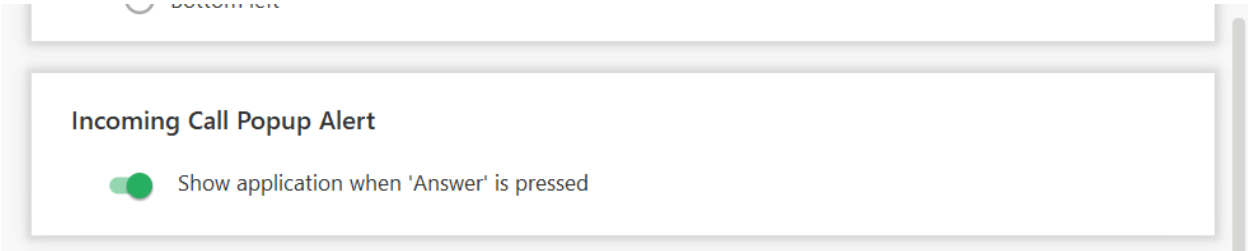


Popup alert for a message



Popup alert for incoming call

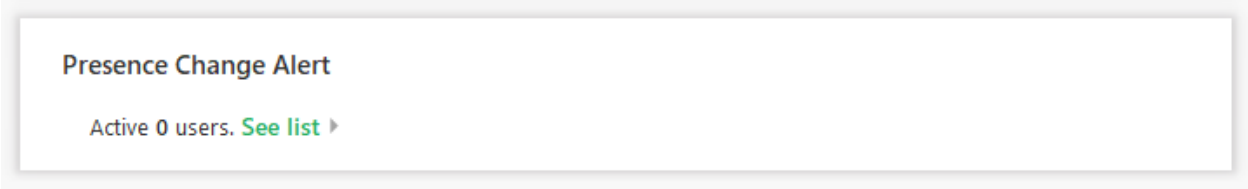
Incoming Call Popup Alert – This setting allows you to present the application while the call is ringing or only after the call was answered.



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:

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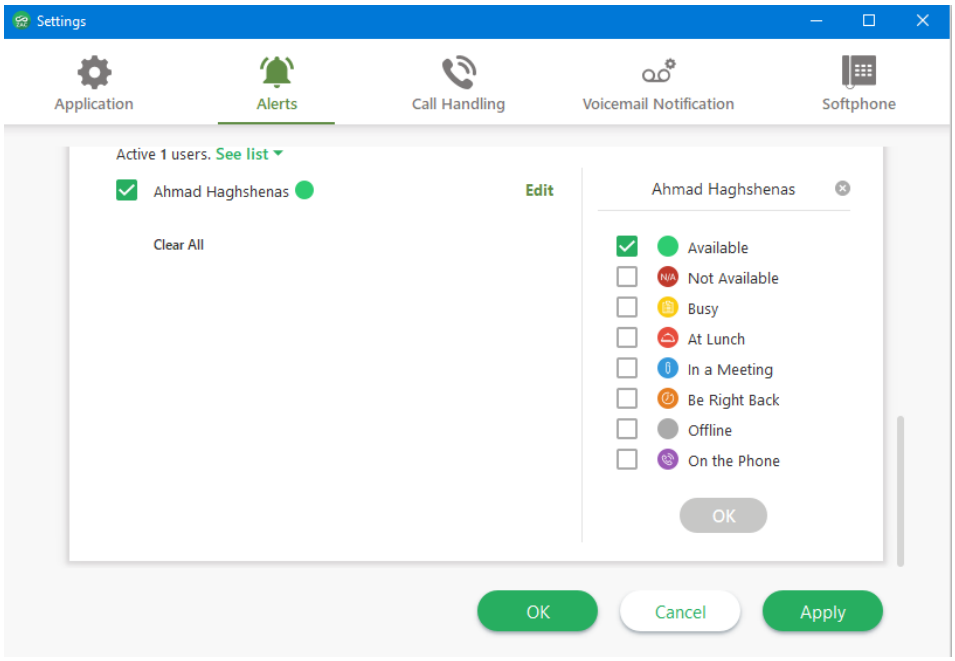
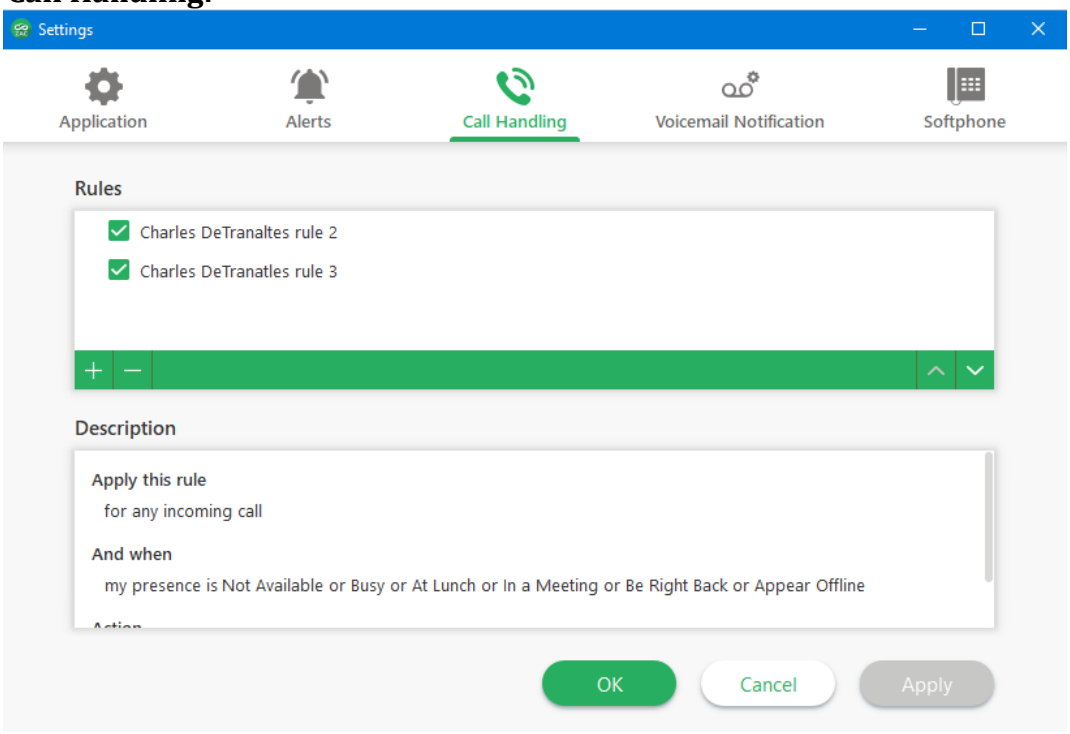


2.3.3 Call Handling:



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.

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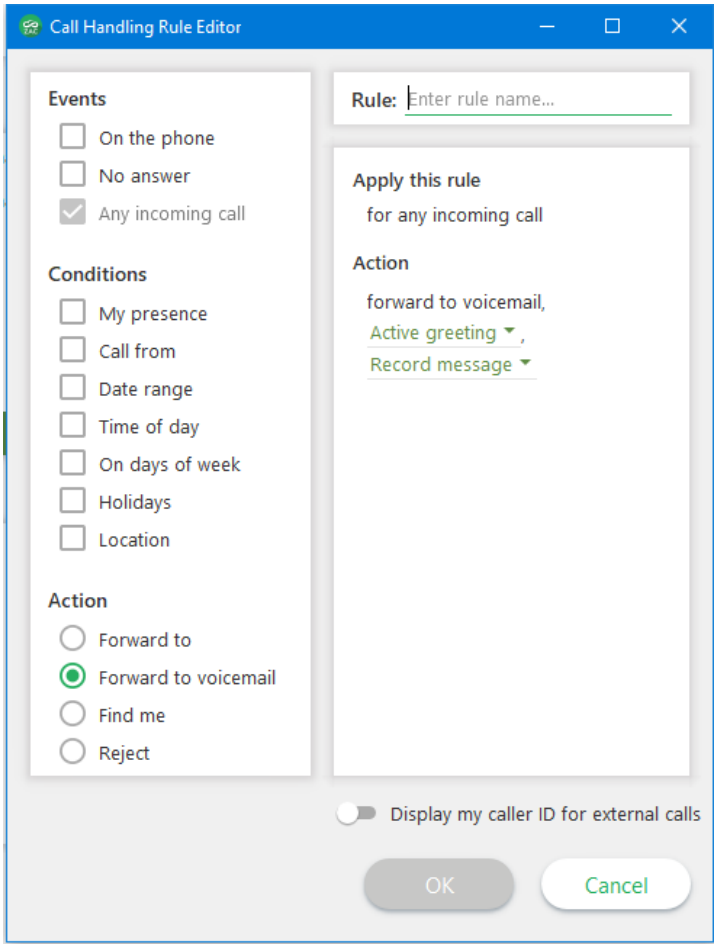
To add a new rule, click the icon at the bottom of the Rules area.

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.

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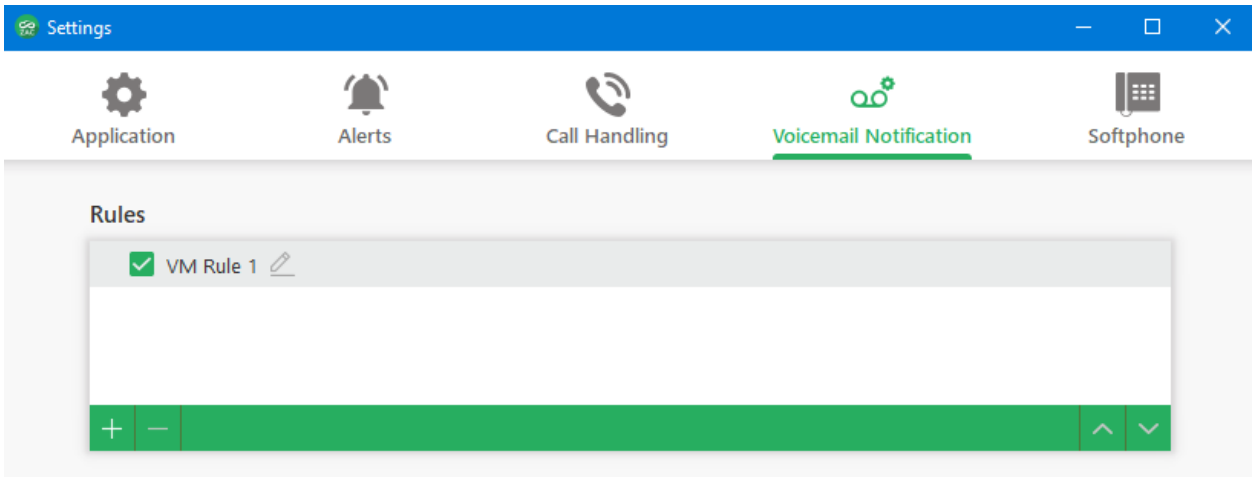
Events – Allows you to select which events can trigger the rule. On the Phone, No answer, or any incoming call.

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 Voicemail Notifications:



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 .

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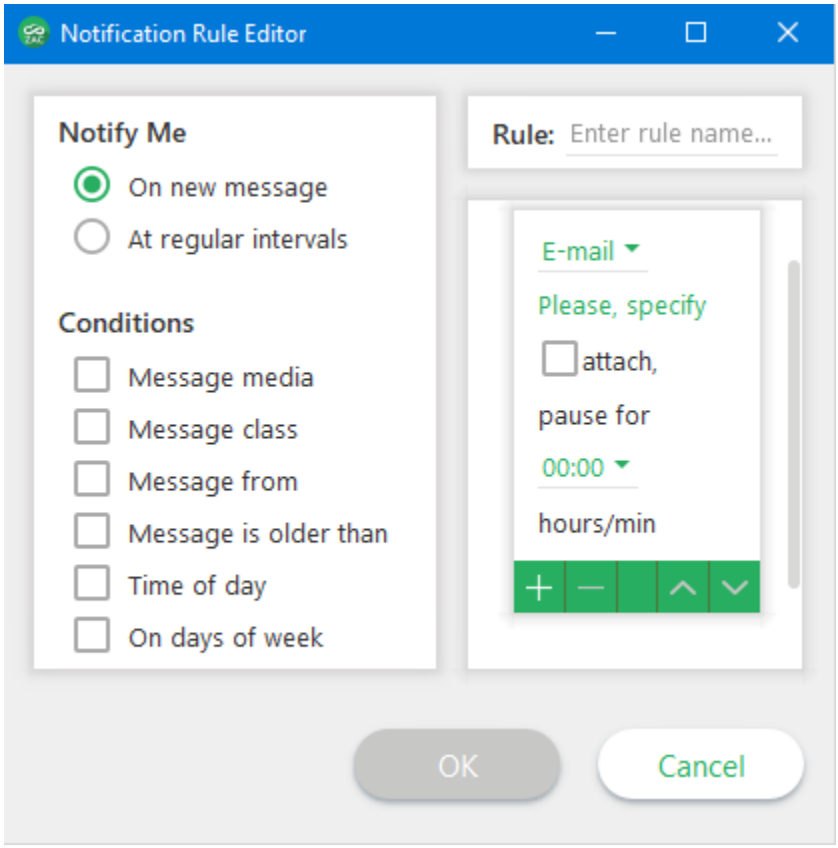
After creating a new rule or to edit a rule (double click the rule), the notification rule editor window will appear.

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.

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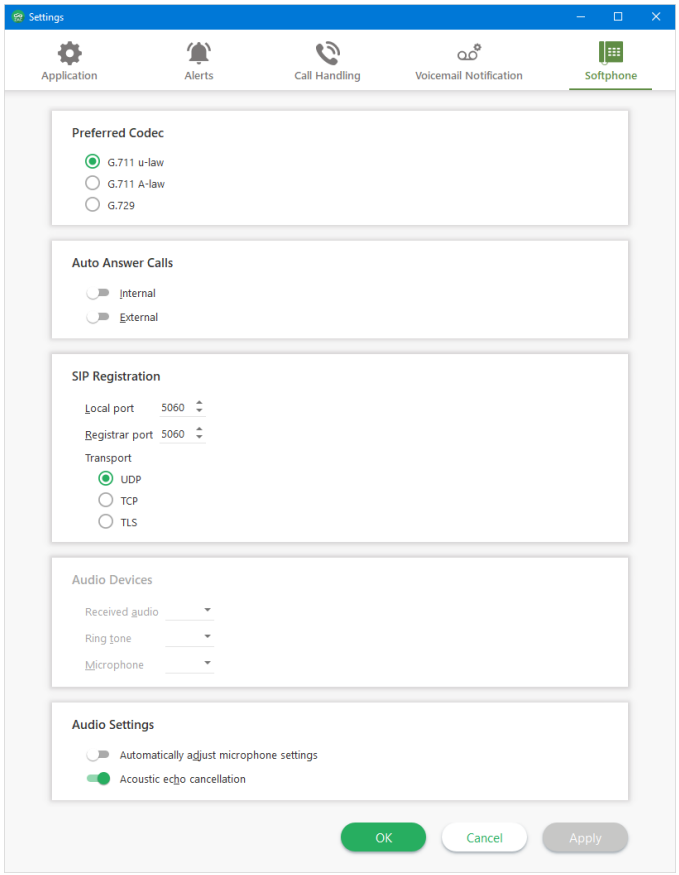
2.3.5 Softphone:

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.



Preferred Codec – Allows you to select which audio codec type to utilize. Please consult with your administrator for proper setup.

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.

SIP Registration – Defines the SIP registration information, ports, PIN, and transport type. Please consult with your administrator for proper setup.

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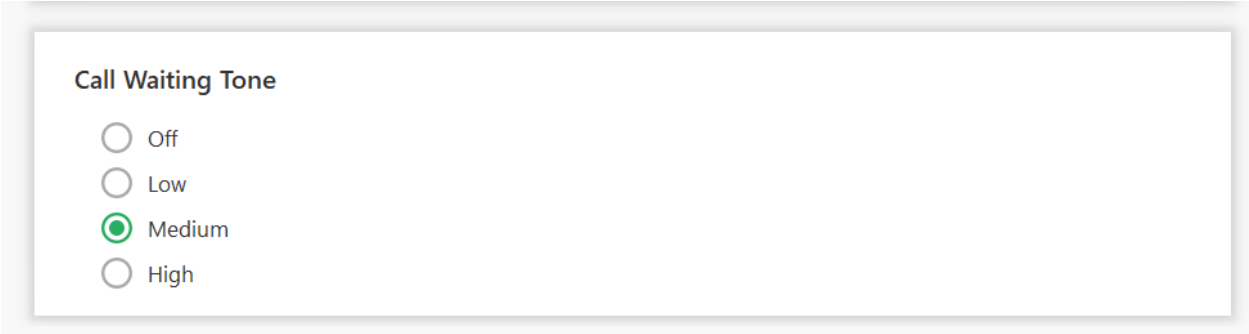
There is no need to set the PIN when running MX firmware 12.0.7 or greater.

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

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.

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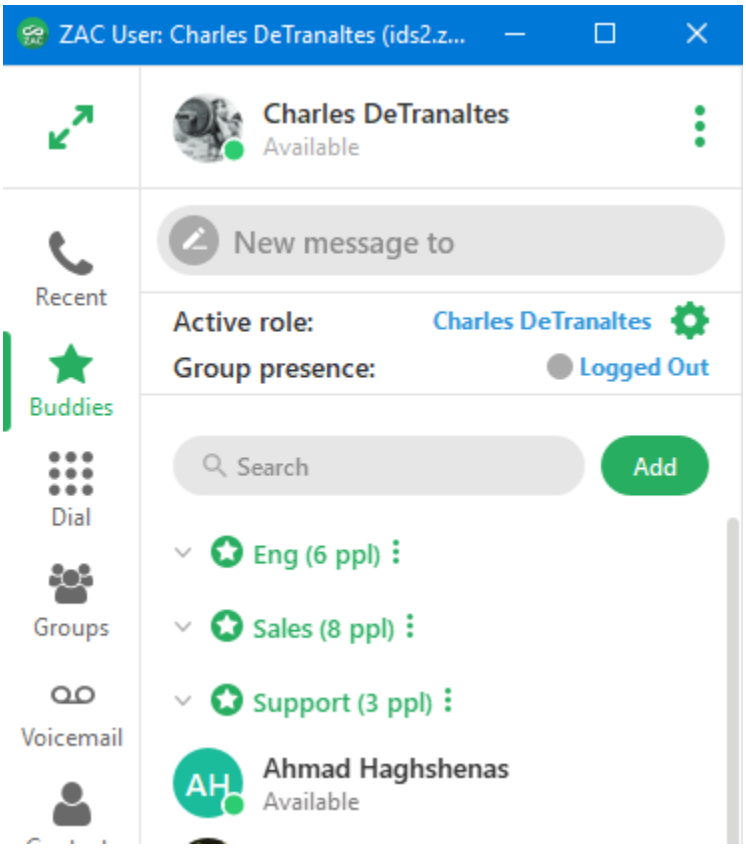
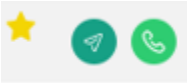
2.4 Buddies Screen

This is the screen where the contacts you designate as buddies and buddy groups are located.



You may click on a buddy to display the options that are available(some options may not be available based on what contact information the user has entered):



Designate/undesignated the contact as a buddy

Start a message session

Call the user

In addition, the following actions are available :

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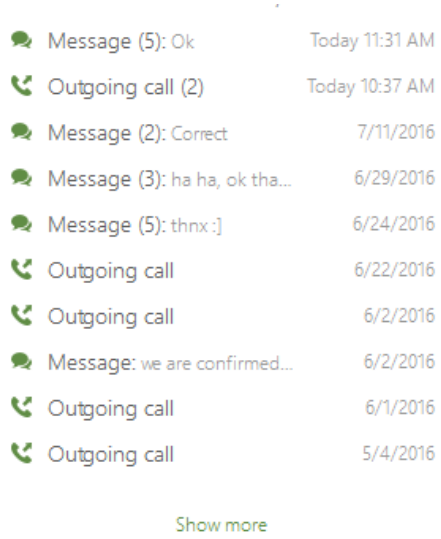
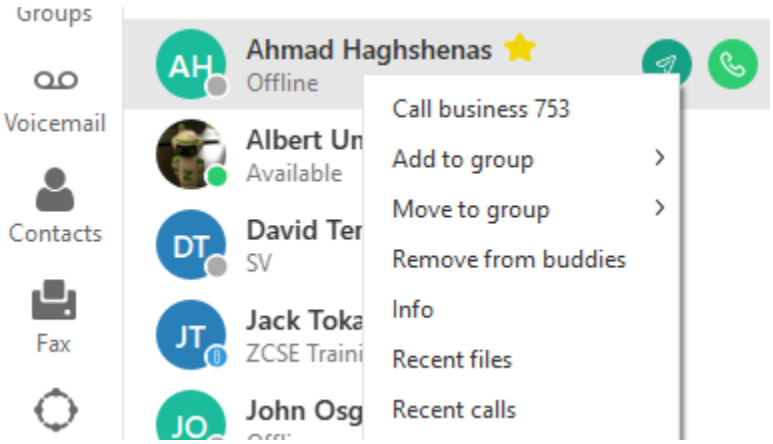
Display recent files/images shared with this user

Display additional information of the buddy and set presence change alert.



You may also right click on a buddy to present an option menu:



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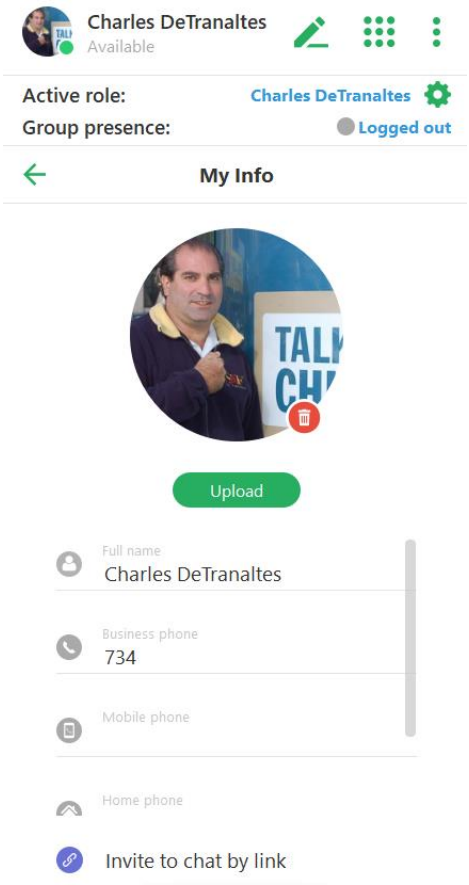
2.4.1 External user invite to chat

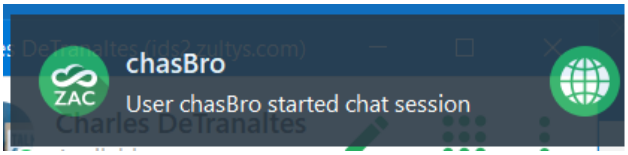
You may invite an external party to a Chat session. To do this:

Click your name to present the My Info screen:



Click the Invite to chat by link option. A link URL will be copied to the clipboard. The external user will click the link, enter their name and join the chat session.

When they enter the session you will receive a popup notification:



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

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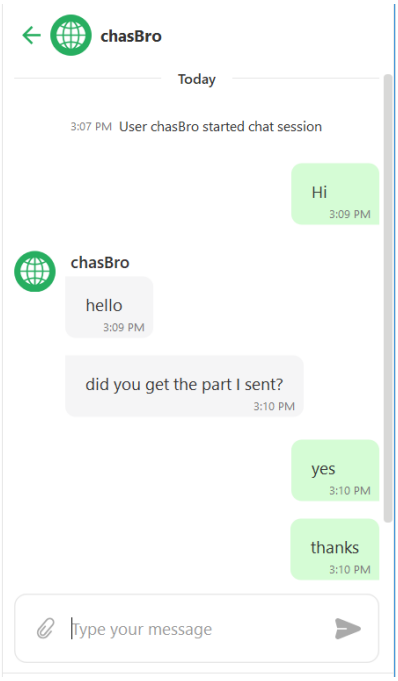
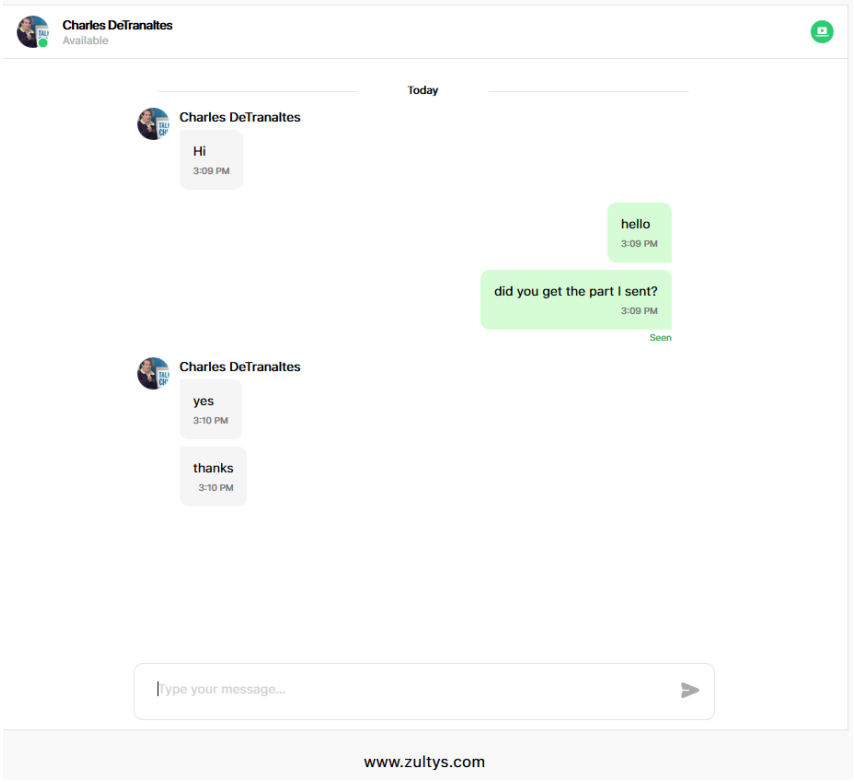


ZAC view



External user view

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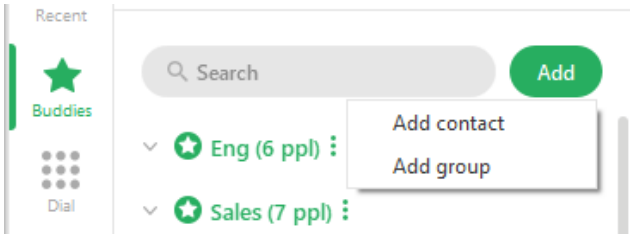
2.4.2 Buddy Groups

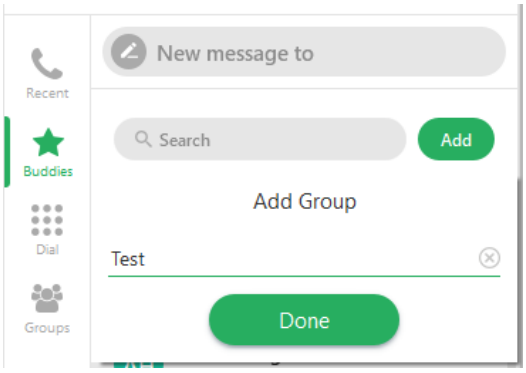
ZAC allows you to configure your buddies into groups for easy identification. For example, you may group your buddies by department Sales, Ops, Eng, etc.

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

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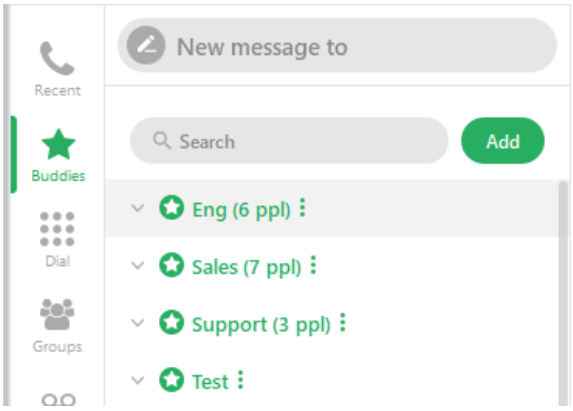
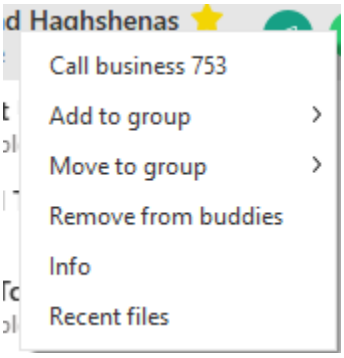


To add buddies/contacts to a group:

1) You may add existing buddies to a group simply by dragging the desired buddy into the group.
2) 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.

Right click on the desired buddy/contact and click Info. Click the Enable Presence Alert to set an alert:

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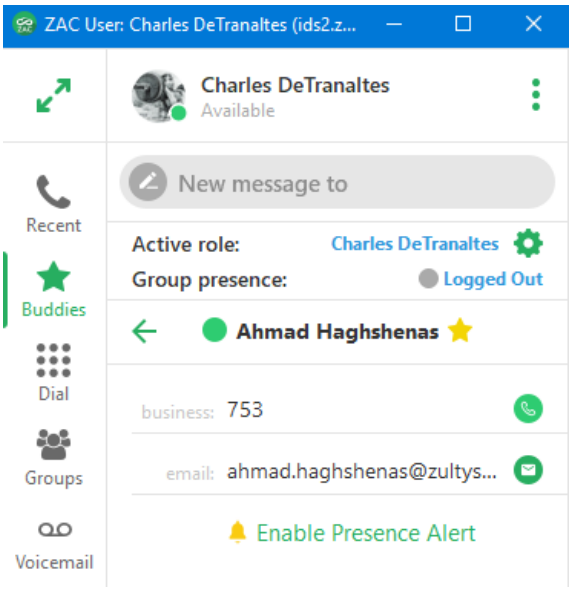
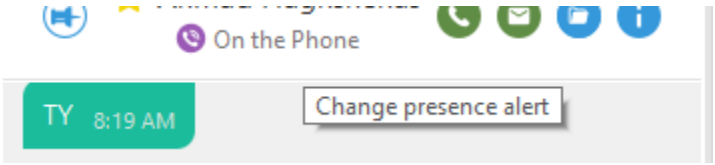
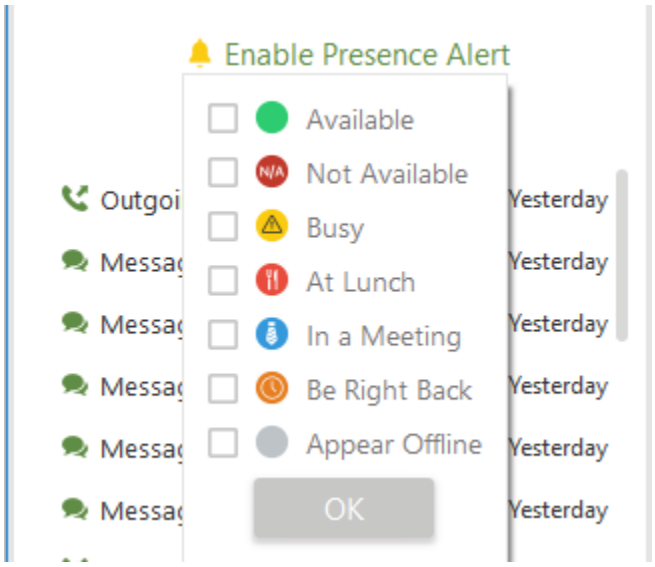


If you are in expanded mode with the contact selected, you may select the info icon:



Click Enable Presence Alert or select Change presence alert



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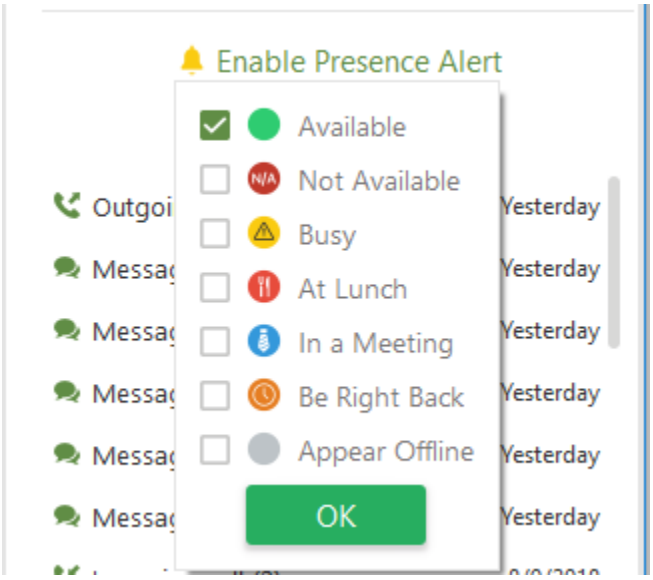
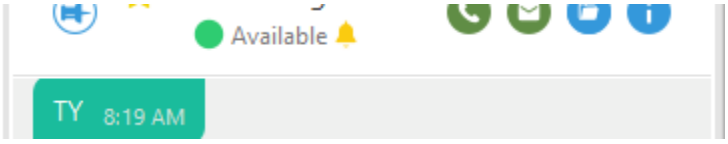
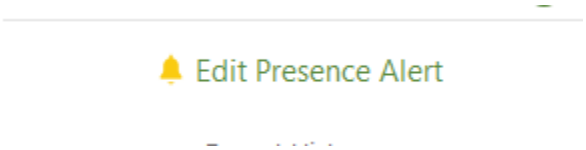
Select the desired presence and click OK



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



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



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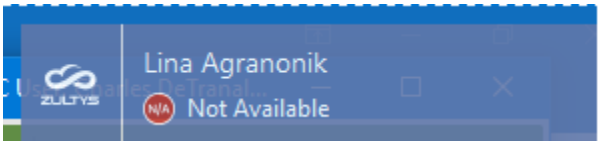
You may select another presence state or uncheck the current one and click OK to cancel the alert request.
You may also navigate to Settings>Alerts to manage your active presence change alerts.

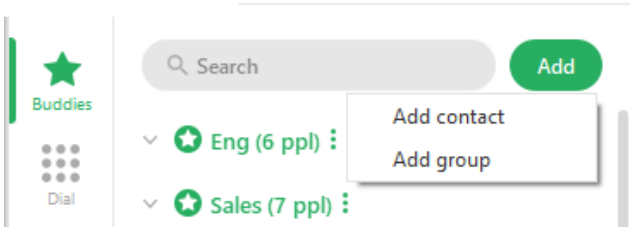
When the selected users' presence changes, an alert notification will appear and a sound will play.



2.4.4 My Contacts

In addition to Buddies, you may create your own local contact list.

Click the Add button in the Buddies screen.



Click Add contact.

Enter the desired contact information:

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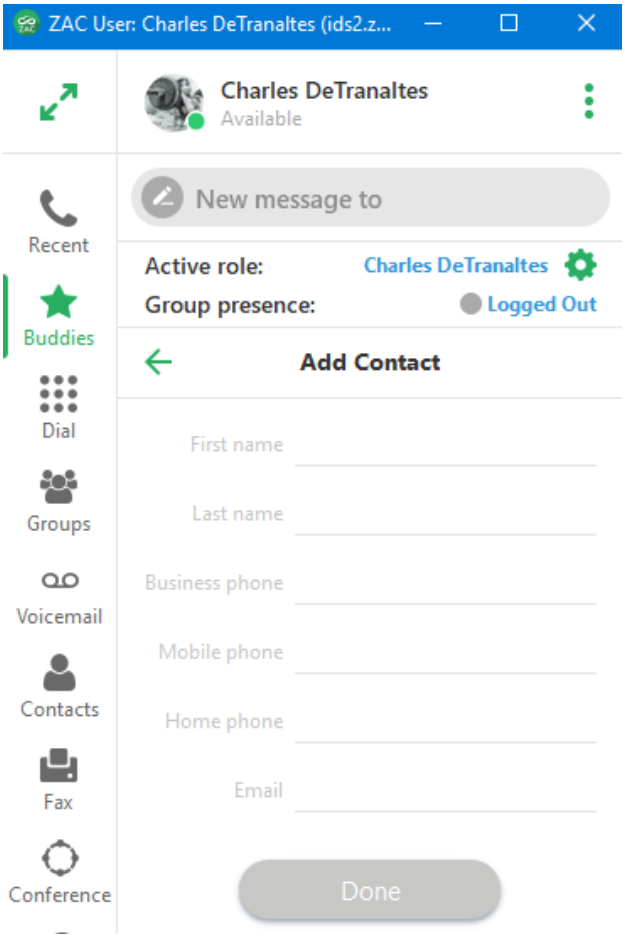

Click Done

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.

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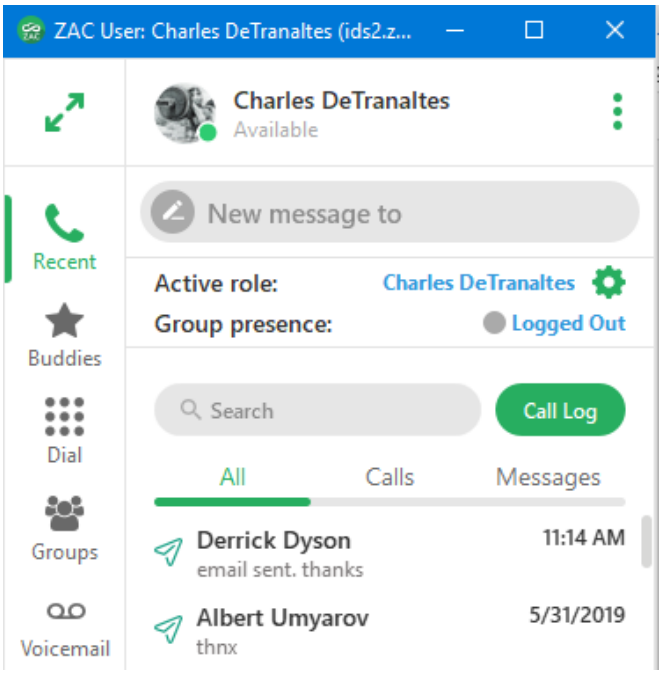

You may filter Recent activity by All, only Calls, or only Messages. All includes both calls and messages. Simply select the All/Calls/Messages header items to select that particular filter. Moving your mouse over the contact will display the call and message options.

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

2.5.1 Call Log

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

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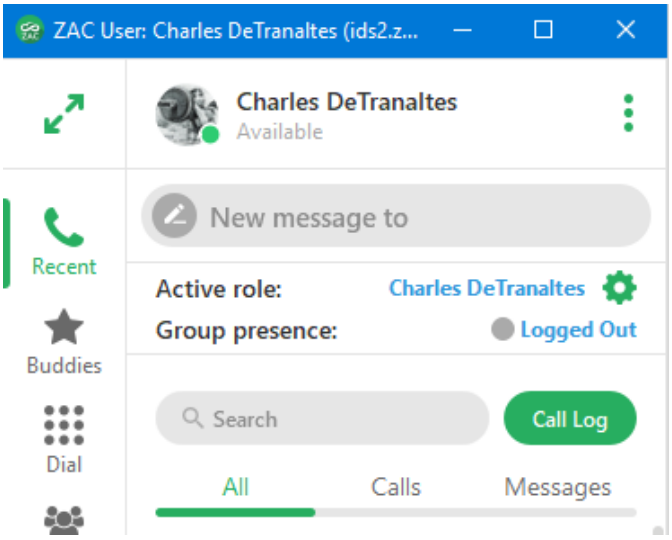
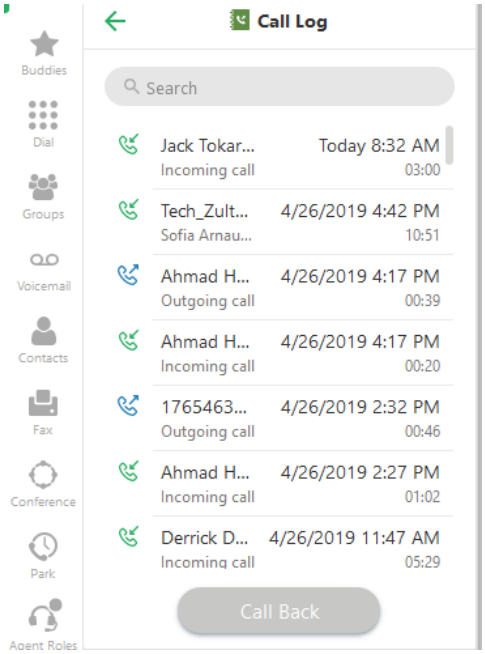


A list of calls will be displayed.



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.

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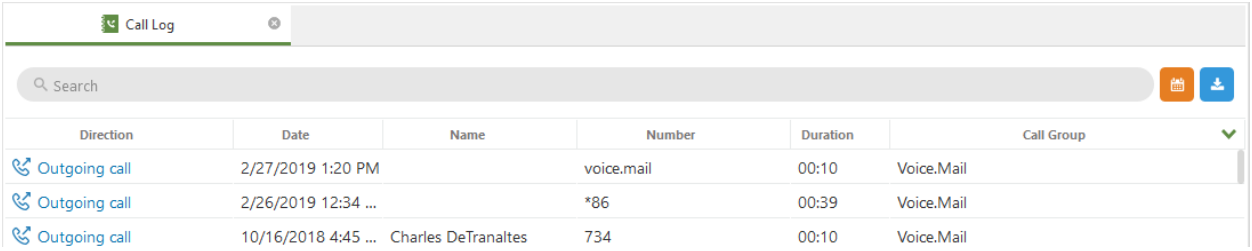
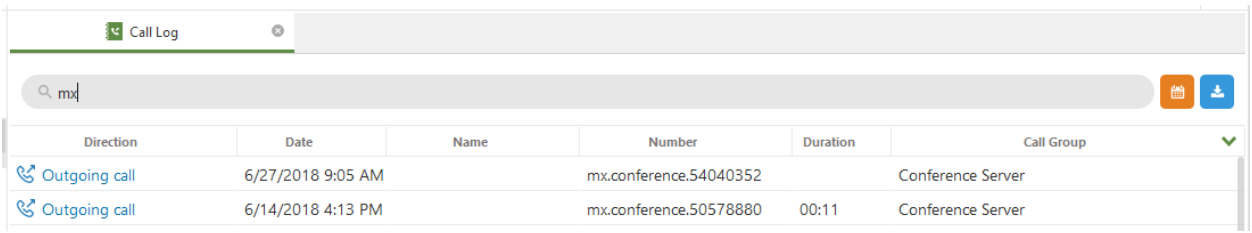


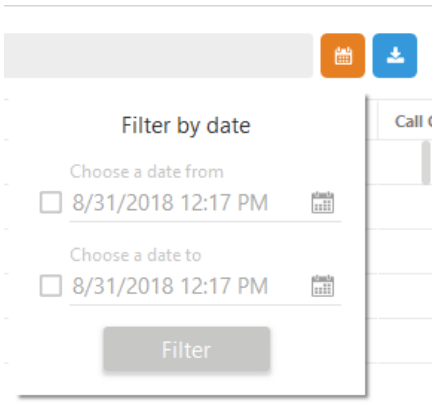
You may sort the entry order of columns by clicking on the column heading.

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.

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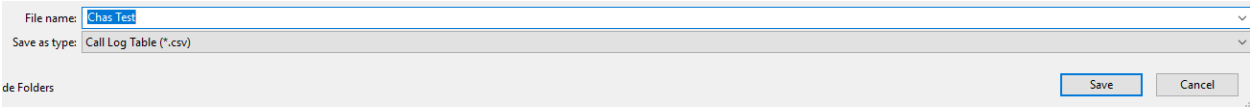
- Click the Save to .csv icon
- Navigate to the desired drive/folder
- Enter the desired filename



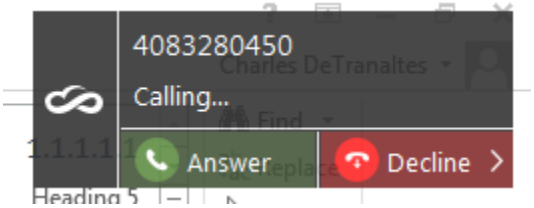
- Click Save

2.6 Dial Screen(minimized mode)

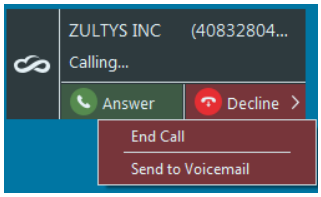
This is the screen in which you make and receive calls as well as manage active calls while you are in minimized mode.

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.



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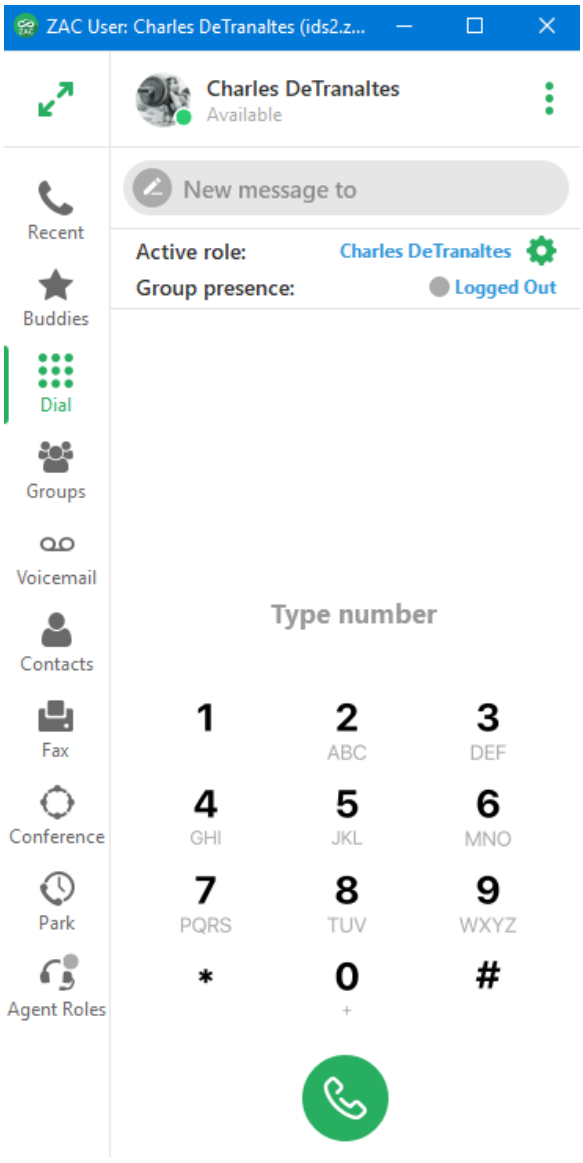
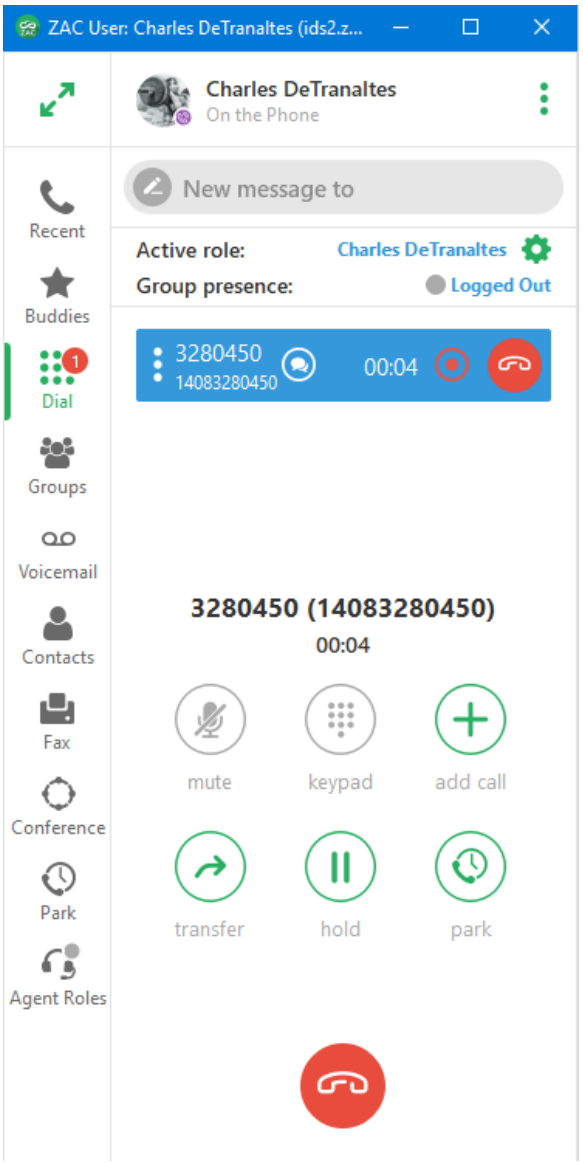
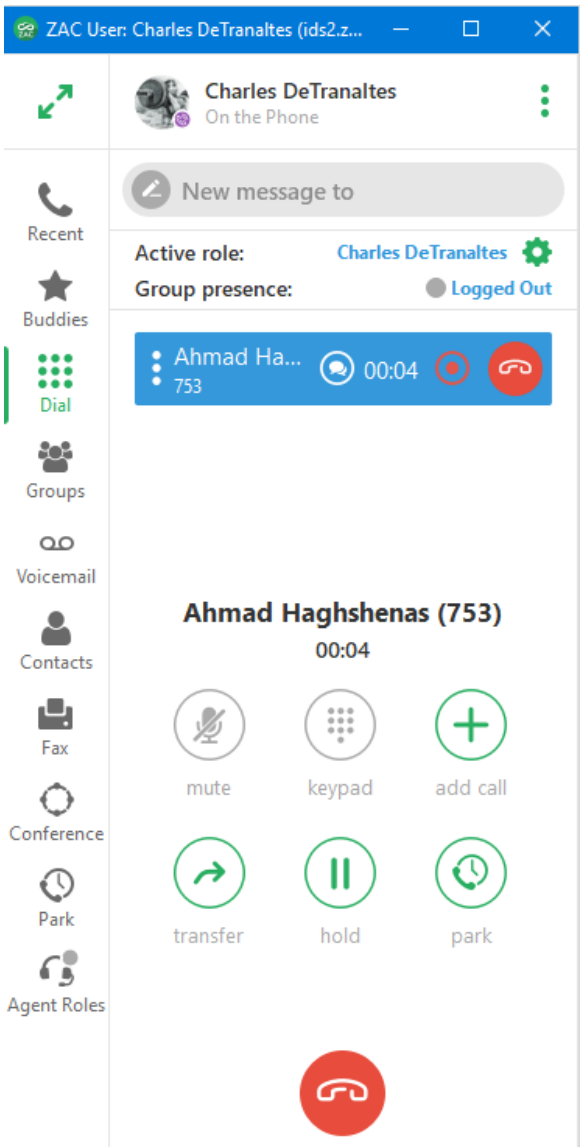


Dial screen, ready to enter phone number



Active call session, external call

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.



Active call session, internal call

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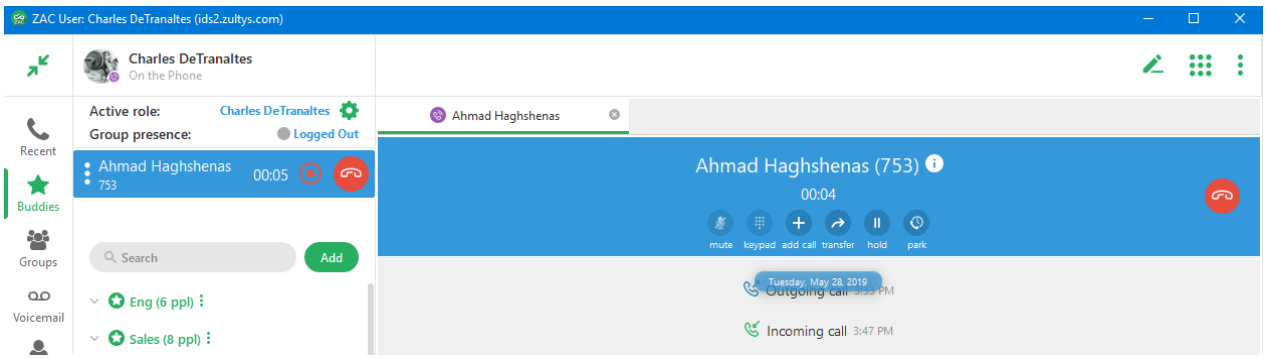
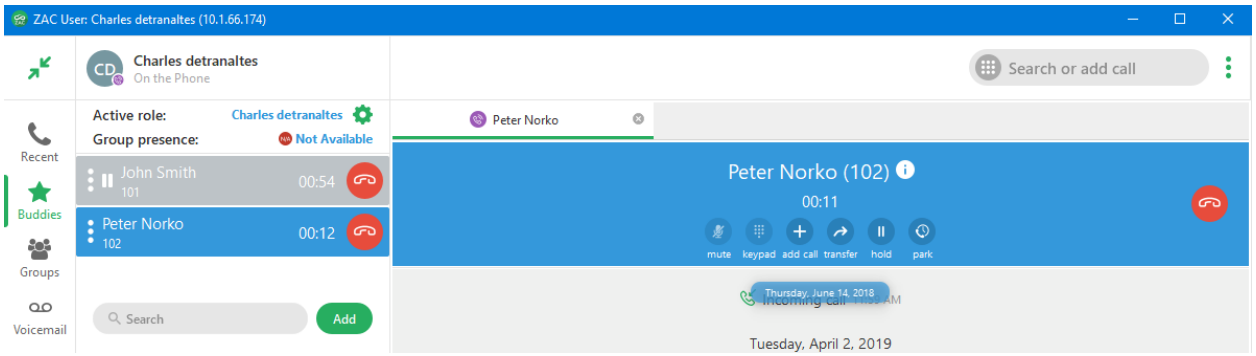
Single call session in expanded mode:



Multiple call sessions in expanded mode:



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

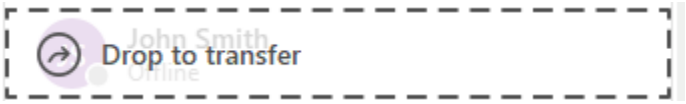
2.6.1 Drag and Drop Operations

ZAC allows many drag and drop operations to be performed to make call processing operations simple.

- 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.
- Blind transfer a call to a user/number by dragging it from the calls area or call tab to one of the contact views (Recent/Contacts/Buddies)
- Blind transfer a call to a user/number by dragging the contact/number from one of contact views (Recent/Contacts/Buddies) to a tab with a call or call in the calls area on top.

- Auto opening an inactive view (to be able to drop on its contact) by dragging a call over its button.

- When a drag and drop operation is available, the icon will change to indicate the action to complete the drag and drop operation.



2.6.2 Blind Transfer

When performing a Blind Transfer, you do not speak with the party to whom you are transferring the call, but simply send the call to the intended transferee. This also may be referred to as unattended, or unsupervised transfer.

Drag and drop the session block to the Contacts or buddy list contact that is to receive the transferred call. Once the desired contact is found, drop the call onto the contact. This may be done in minimized or expanded mode.
-or-
Press the Transfer icon in the dial screen. Start typing the desired contact. Once found, click the transfer icon to complete the transfer.

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

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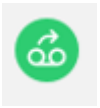
2.6.4 Transfer to Voicemail

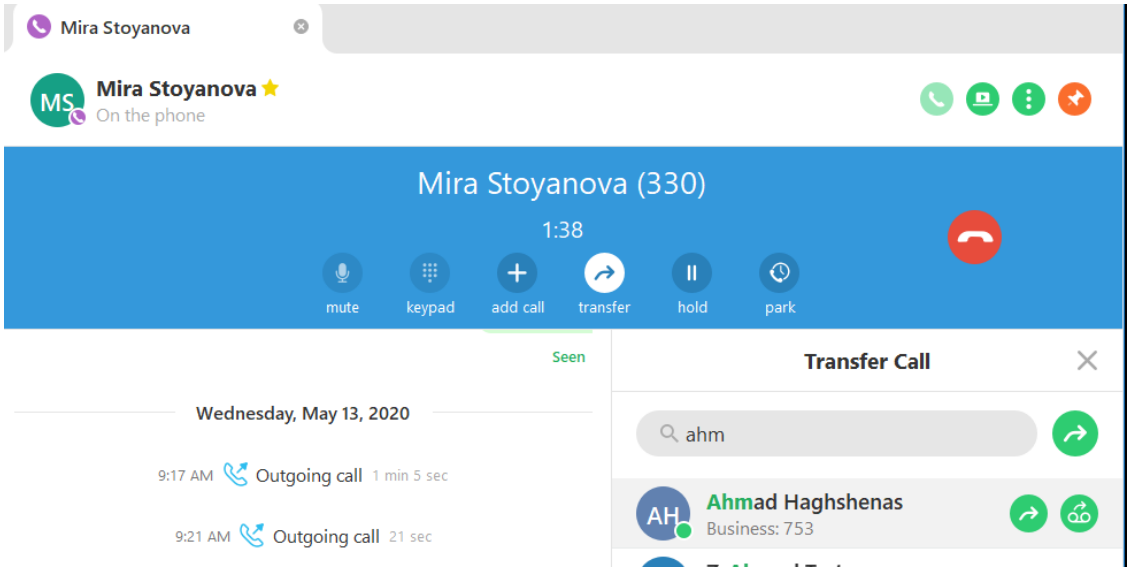
A user may transfer a call directly to another user's mailbox.

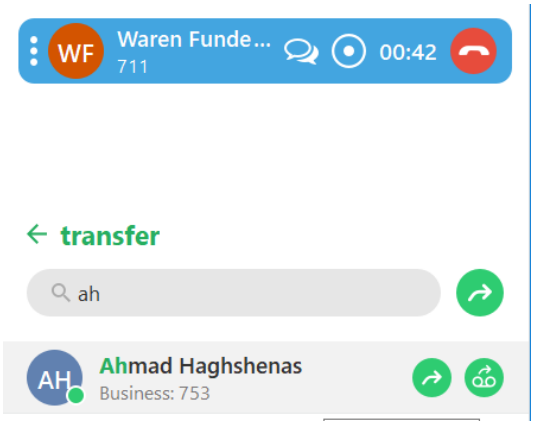
While on a call, press the transfer icon

Locate the desired individual in the transfer call area.

Click the transfer to voicemail icon 

The call is transferred directly to that user mailbox.





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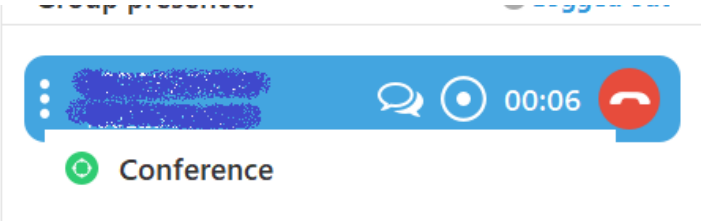
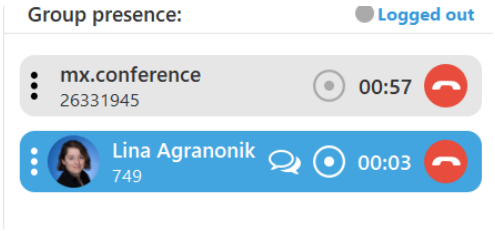
2.6.5 Ad Hoc Conference

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

Establish the MXconference session by clicking the icon and selecting Conference.



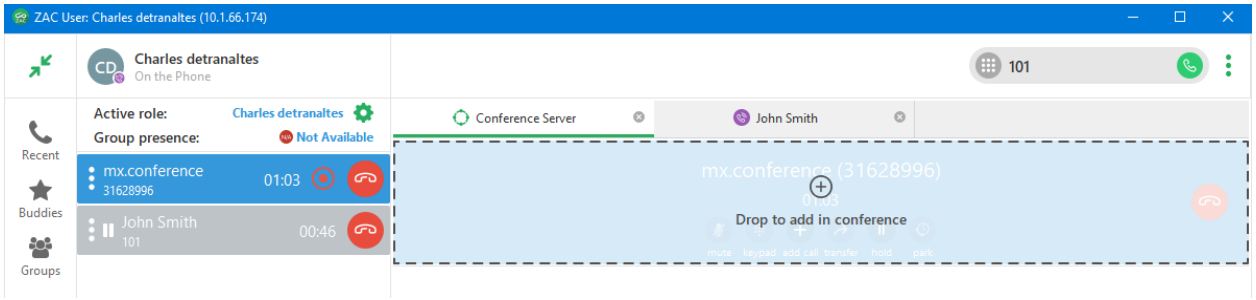
Call the desired party to add to the conference:



Place the called party on hold and return to the conference.

Drag the held party call session into the conference call session or the conference tab and release.

The called party is now added to the conference.



You may view the participants by clicking the 3 dot icon while in the conference:

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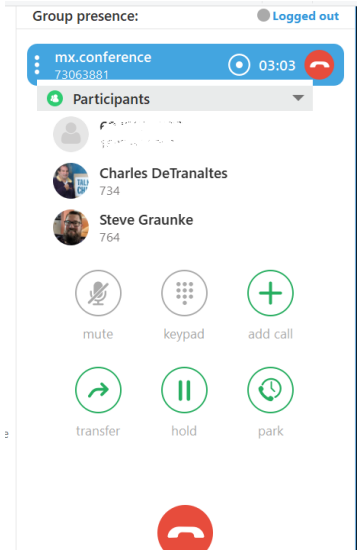


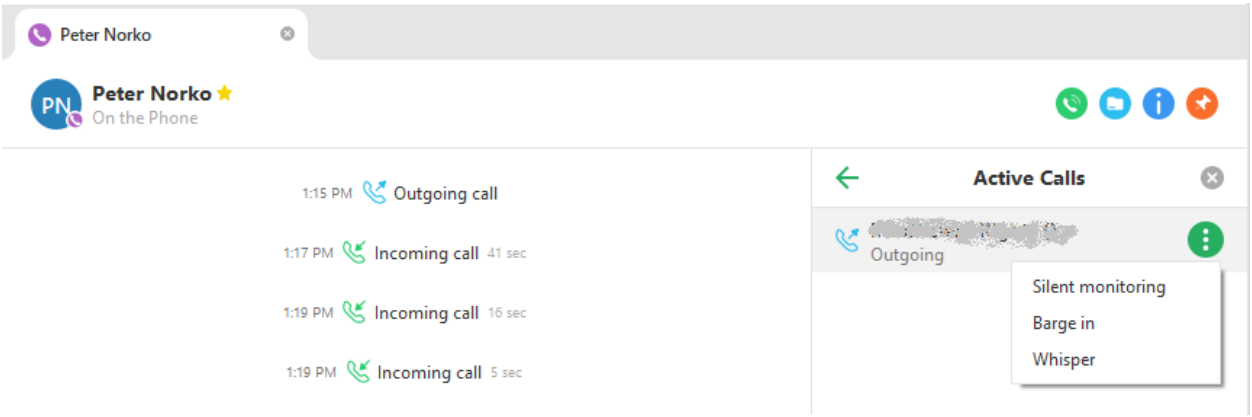
2.6.6 Whisper/Monitor/Barge

This feature allows users with proper administrative privileges to perform monitor/barge-in/whisper operations on user, ICC, ACD, and Hunt group 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.

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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.
- The system must be licensed for monitoring sessions. The monitoring session license is a concurrent license type.

2.7 Voicemail Screen

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

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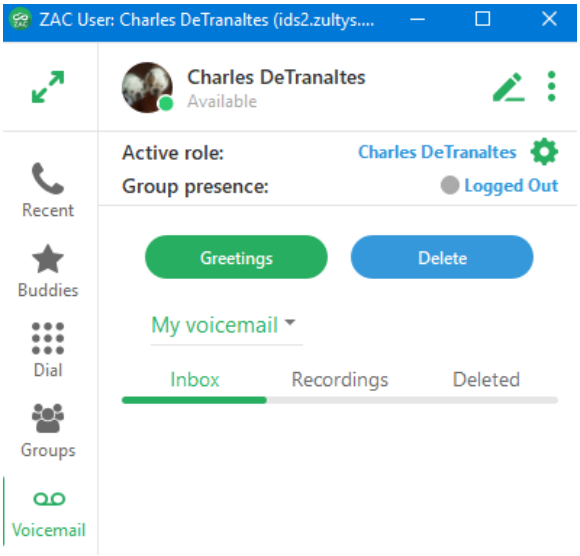
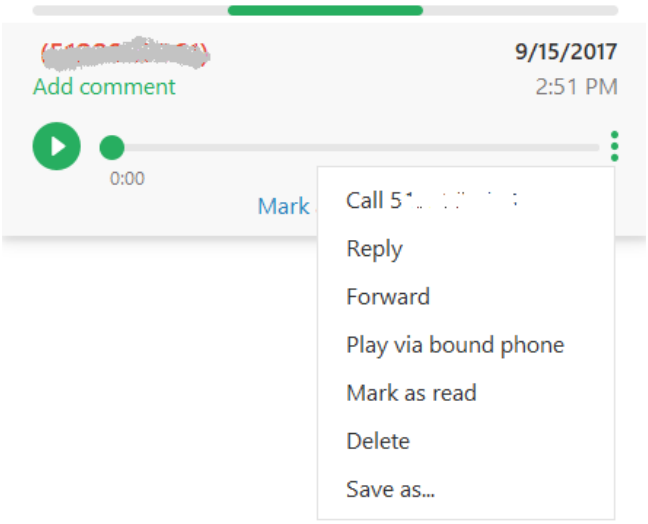


You may choose to view your inbox or deleted box. A list of the voice messages will be displayed in each. Selecting the Recordings item will display a list of on demand call recordings you have.

When you click 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.

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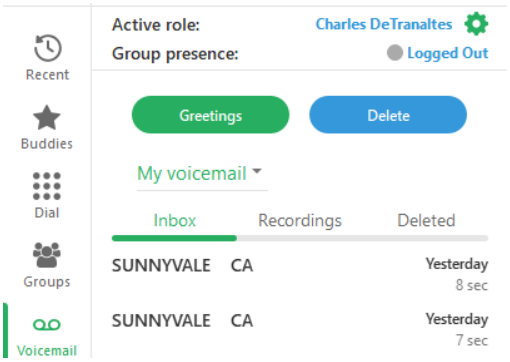
Play/Replay/Pause – Allows you to listen or pause the message. You may also click on the sound bar to jump to any point of the message.

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, click the Delete icon:



Select the desired voicemail messages to delete.

Click the Delete Selected icon

To delete all voicemail messages select the Delete All icon.

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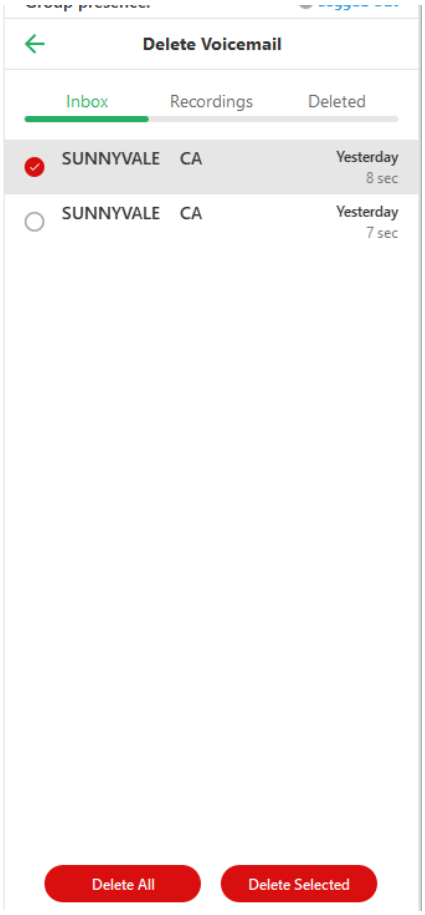
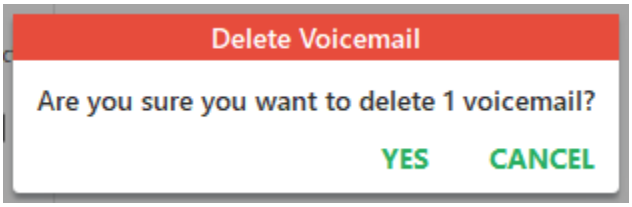


Click Yes at the confirmation window.



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.

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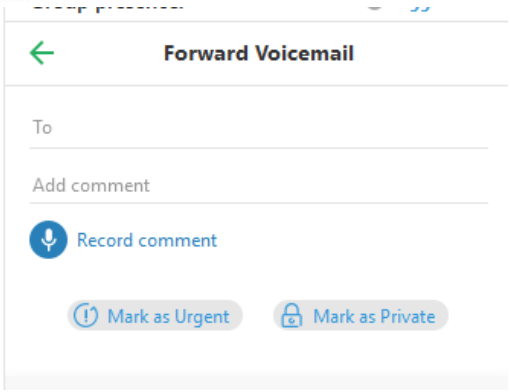
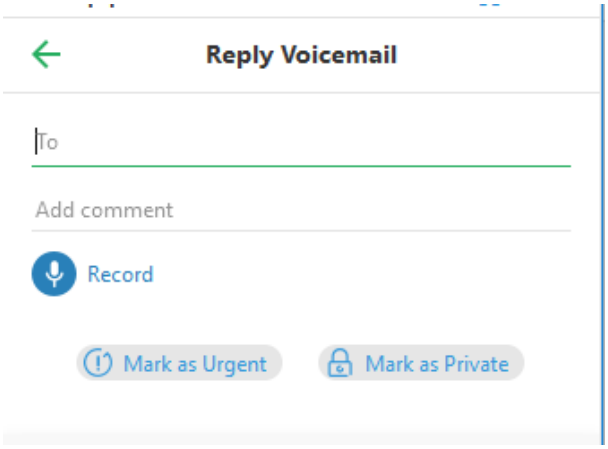


Mark as unread – This allows to store the message in a unread/new state.

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.

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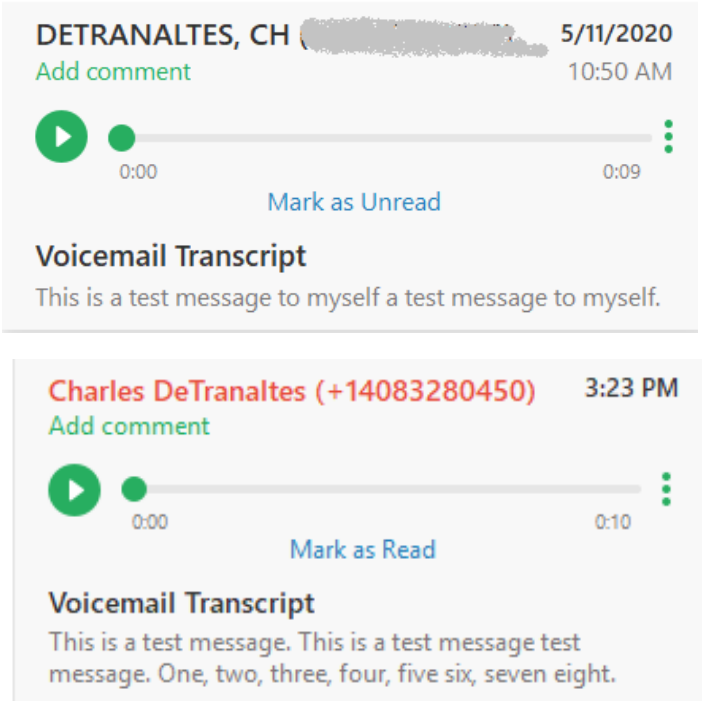
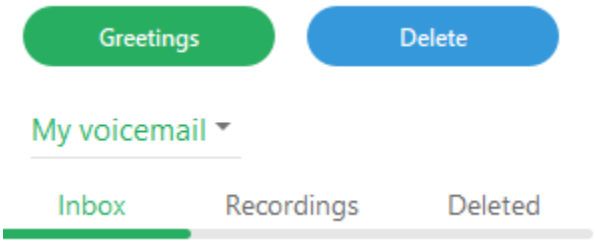
2.7.1 Voicemail Transcription

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.

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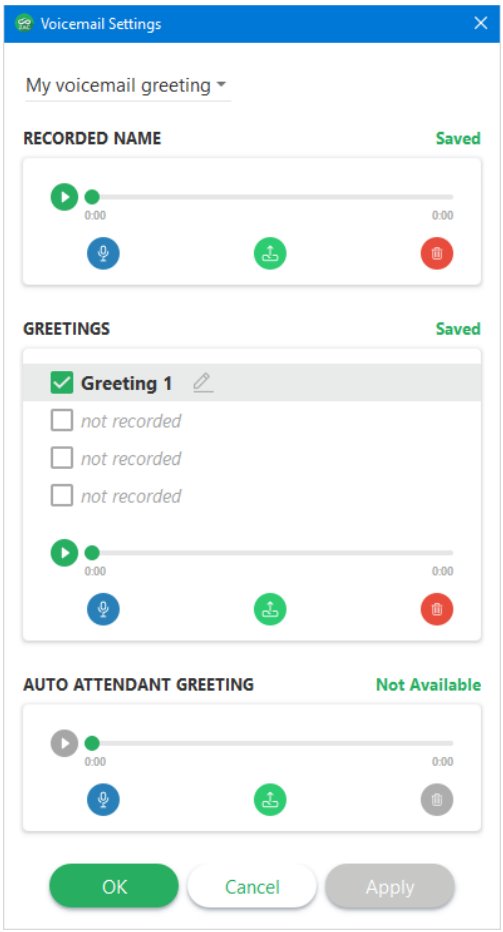

Recorded name – This allows you to import, record, or delete a user name that is associated with your mailbox.

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.

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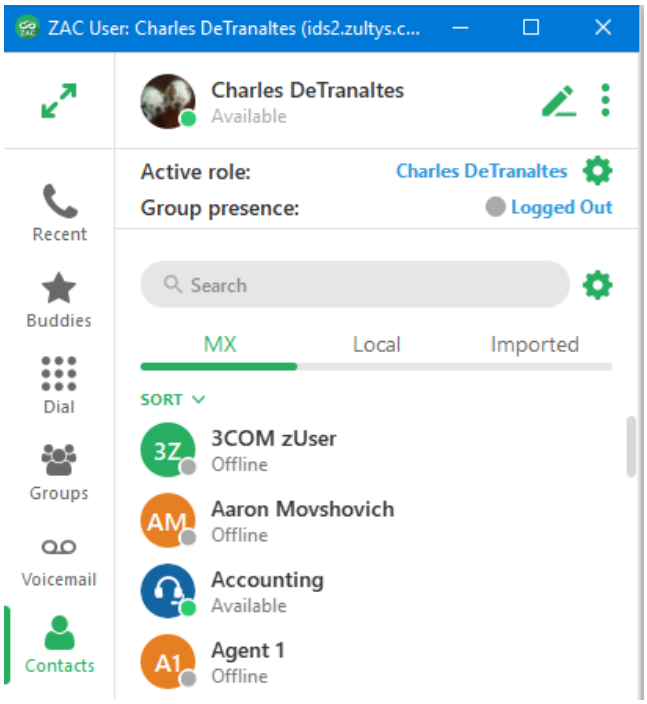
2.8 Contacts Screen

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 Contacts Settings icon . Select the desired locations you want to display. All the contacts from that location will be added to your contact list.

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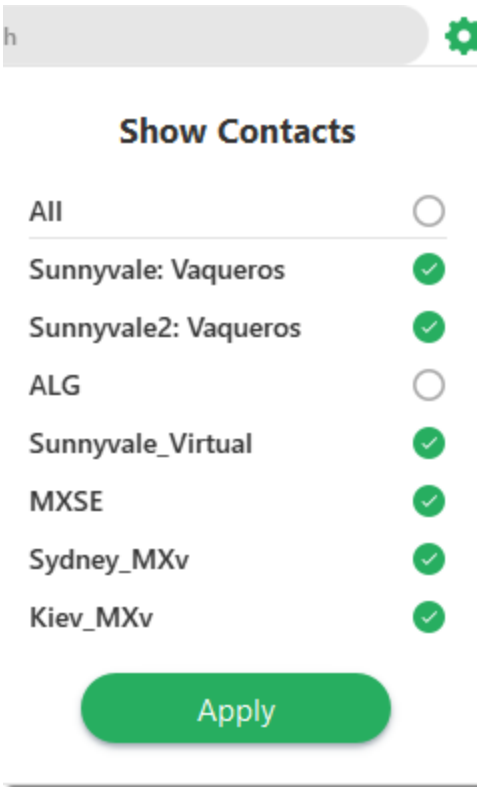
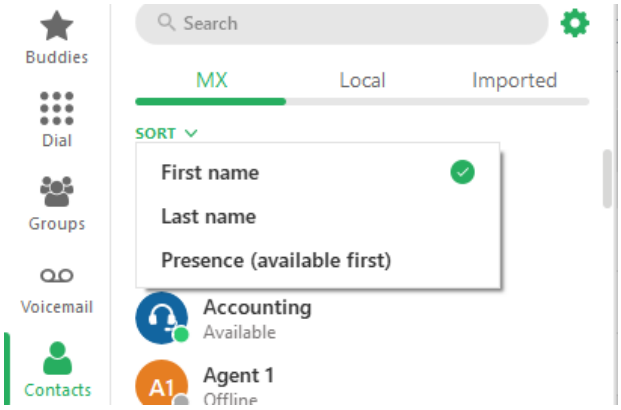


To add a contact as a buddy, highlight the desired contact and click the star icon on the desired contact: . The icon will change to:

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



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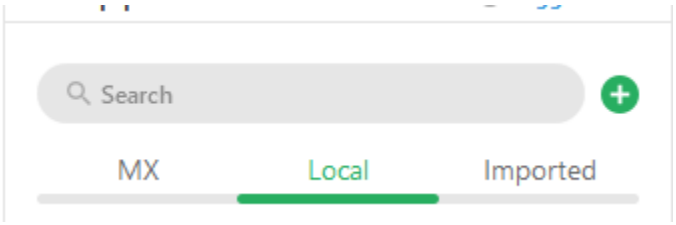
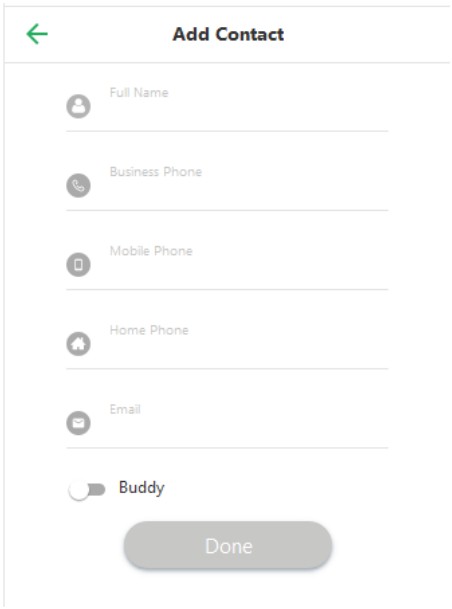
Contact Notes:

ZAC introduces the approach of showing local contacts – both old MXIE buddies and contacts created in ZAC are displayed in Contacts | Local 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 Local Contacts

Select the Local tab and click the Add contact icon:





Enter the desired information and click Done when finished.

2.8.2 Deleting Local contacts

You may delete 1 or more local contacts.

In the Local Contact screen select the icon and click Delete.

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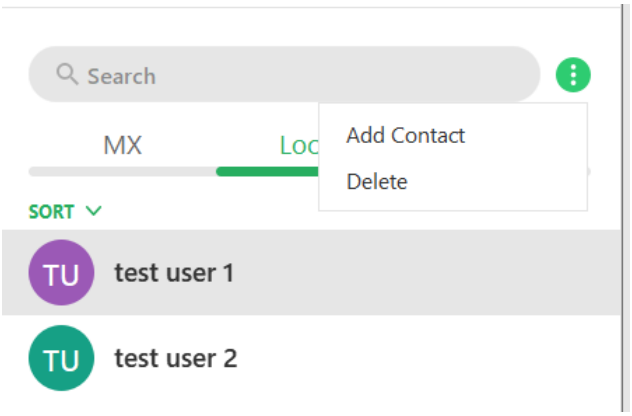
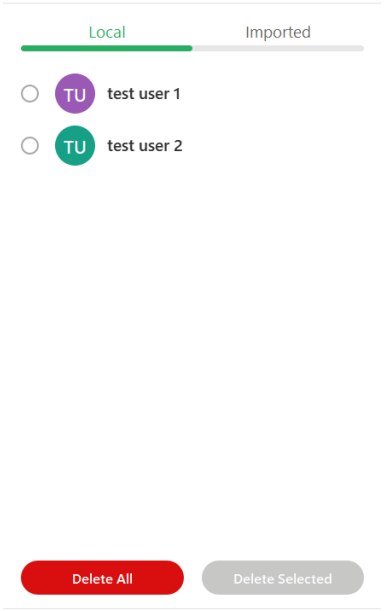
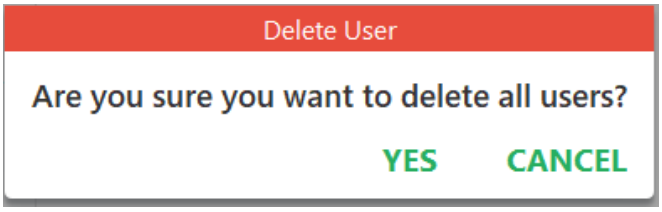


Select the desired contacts to delete or select Delete All:



Click the Delete Selected if only selected contacts are to be deleted.

Click the confirmation button to delete.



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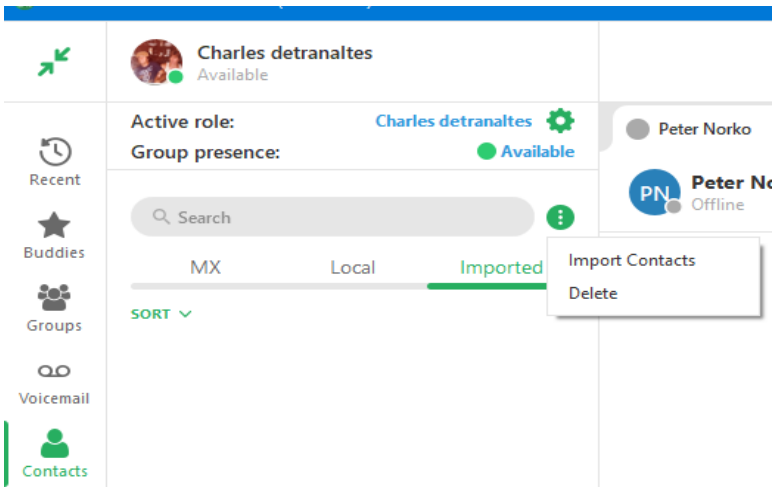
2.8.3 Importing Contacts

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

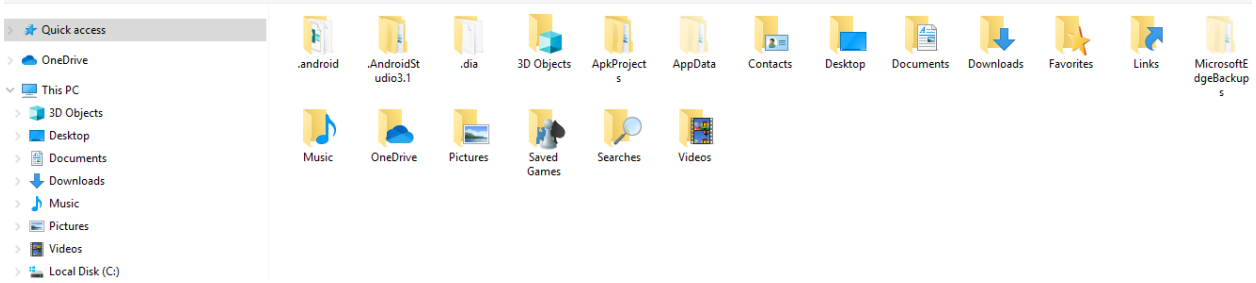
Click the Imported tab

Click the icon

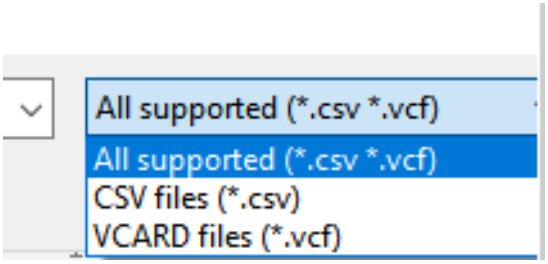


Select Import Contacts

Navigate to the desired folder/file



You may import vCard or .CSV file types.



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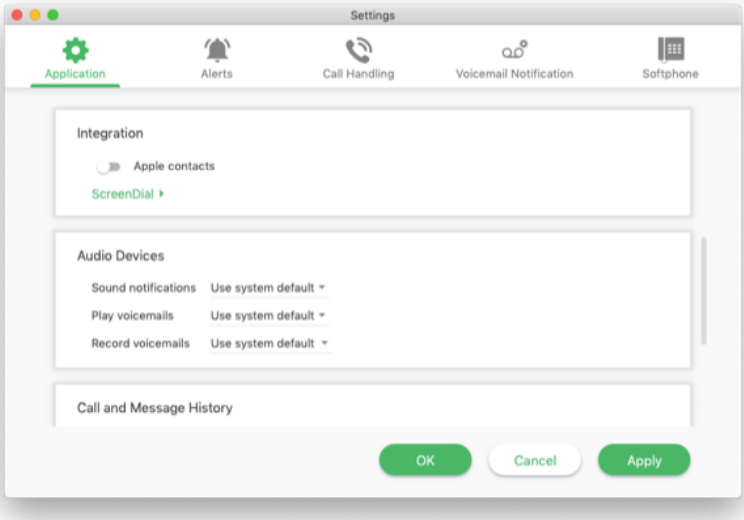
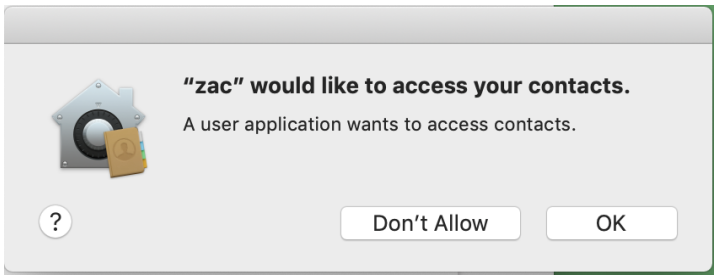
NOTE: If a user sends a file via Chat that is a vCard type with a single contact, an "Add to contacts" item is available which will result in adding the vCard to Address Book.

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:

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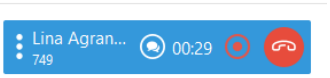
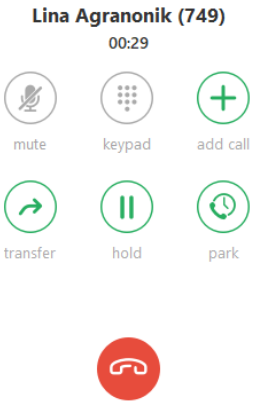
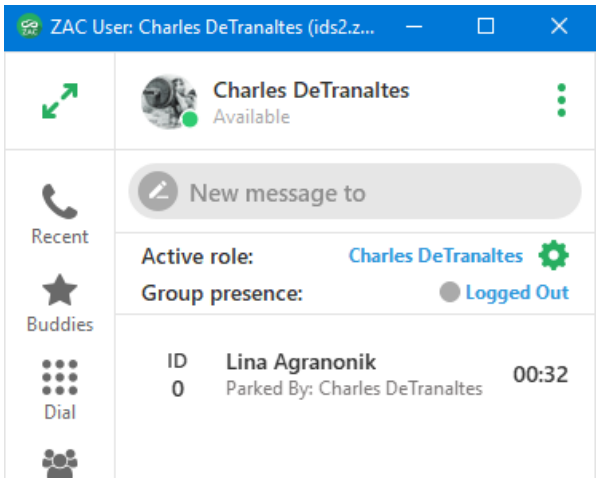




When a call is parked the screen will display:



ID – The park slot ID

Caller – The caller that was parked

Parked by – The user who parked the call

The screen will indicate the amount of time the call has been parked.

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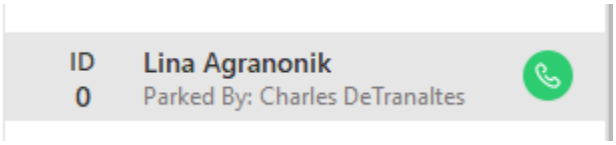
The Park notification area will also indicate that a call is parked.

To retreive a parked call:

Click the handset icon on the parked call.



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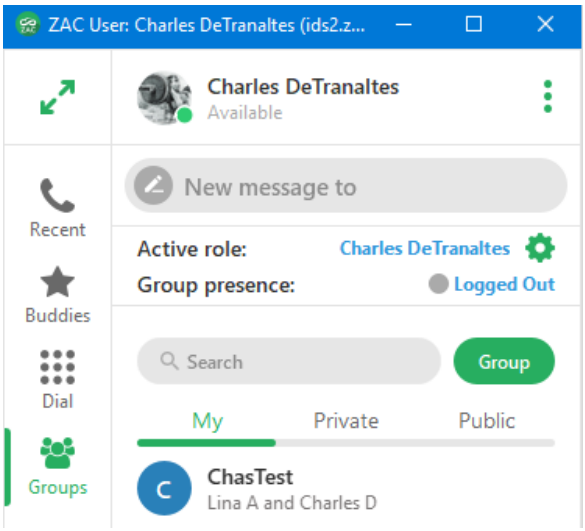
2.10Team Messaging – Chat Groups

This is the screen where the Team Messaging (Chat Group) function is accessed and managed. Team Messaging allow users to have group chat conversations similar to a conference call. 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 My, 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.

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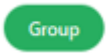
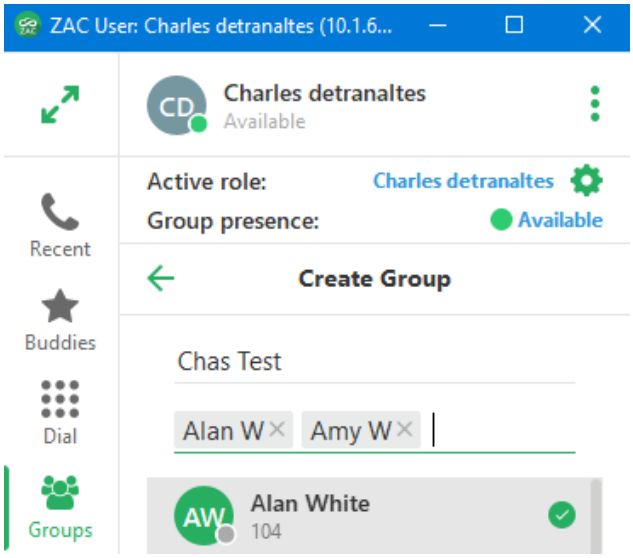
To create a new group:

Click the Group icon 

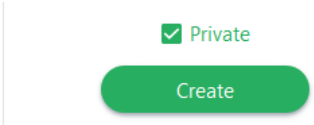
Select Create Group.

Enter the desired name of the group.

Select the desired members by clicking on the member in the directory or typing their name.
Once a member is added, you may remove them by clicking on the X next to their name



Check the box if the Group is to be a Private type group. If this is not selected, the group will be a public group for all users to view/join.



Click Create.

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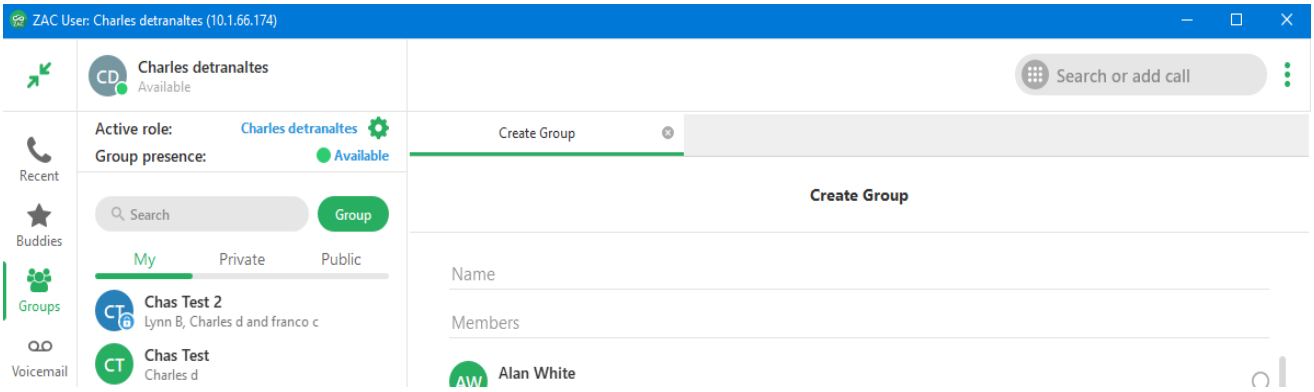
In expanded mode click the Create Group tab.

Enter the desired group name and select the users you want to be part of the group. Each time you click a user, they will appear in the Members area at the top of the screen. You may delete a member by clicking the X next to their name.



Check the box if the Group is to be a Private type group. If this is not selected, the group will be a public group for all users to view/join.

Click Create.

To edit a group:

Right click on the desired Chat group and select Info:

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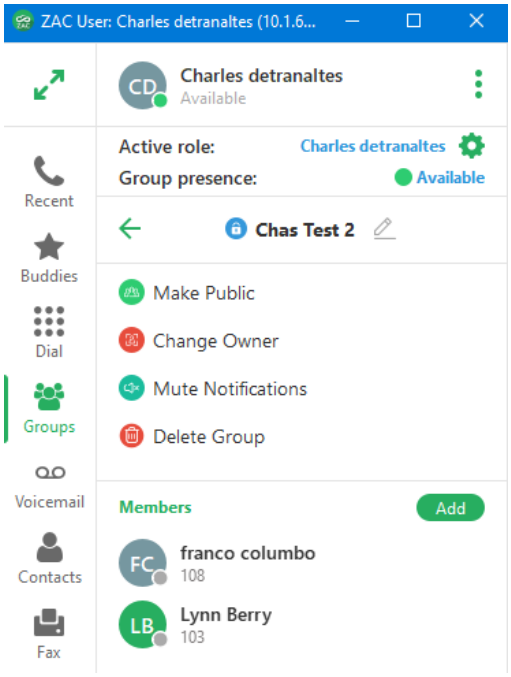

Select the desired option you wish to perform on the group.

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.

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

Add Members – This action allows you to add additional members to the group.

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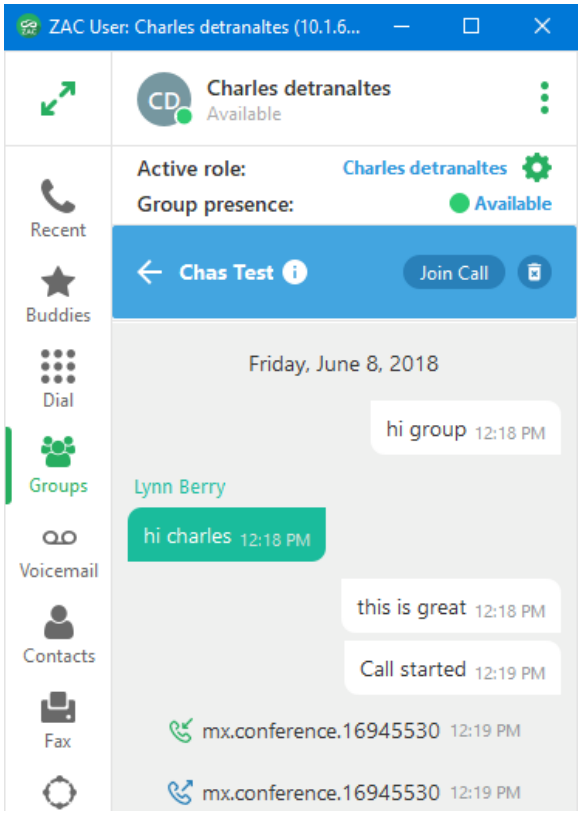
To view/converse the group chat:

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.

To create an MXconference when in a group chat:

While in the desired group, select the start audio conference icon

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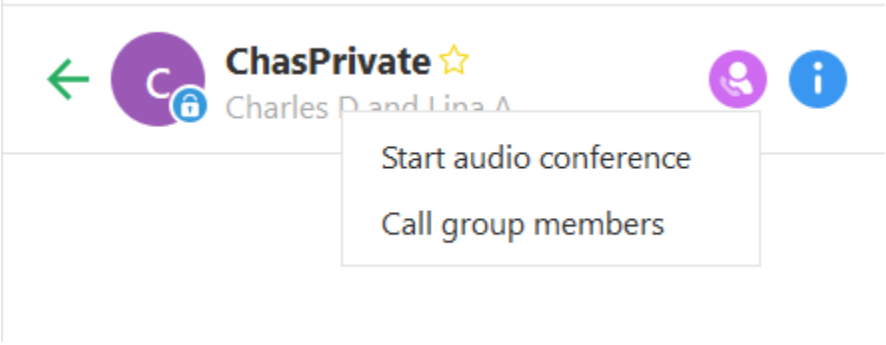


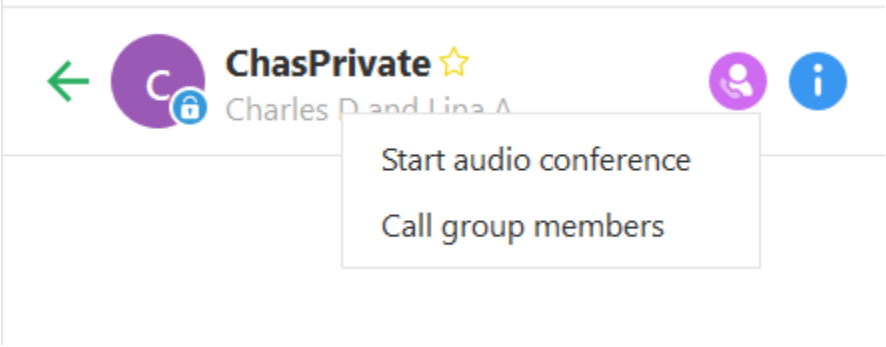
Click the Start Audio conference option.

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.

To create an MXconference by calling group participants first:

While in the desired group, select the Start audio conference icon

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.

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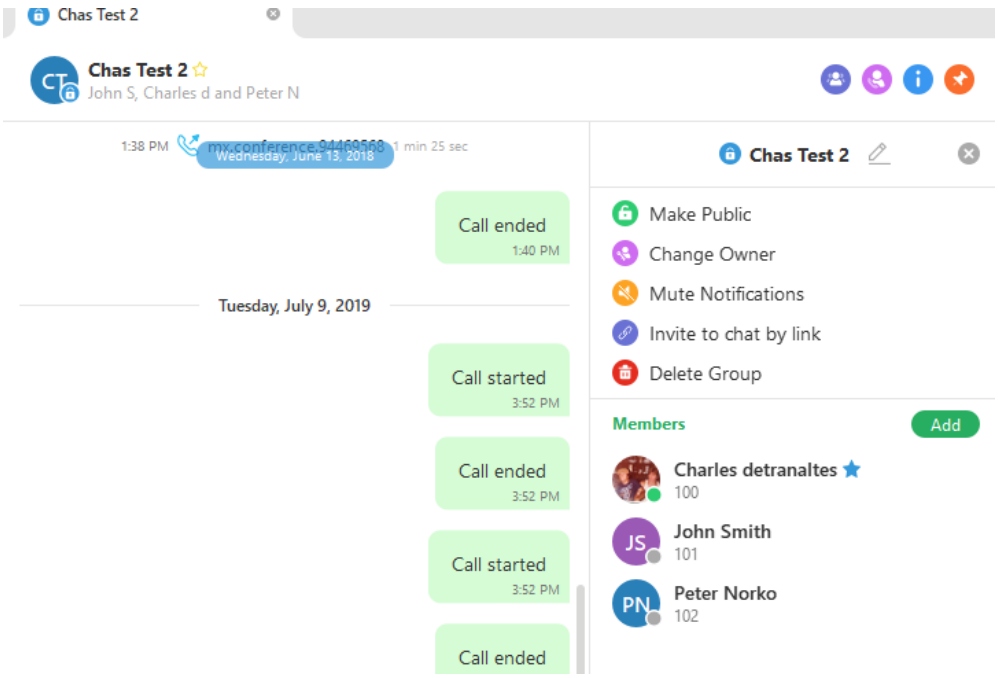
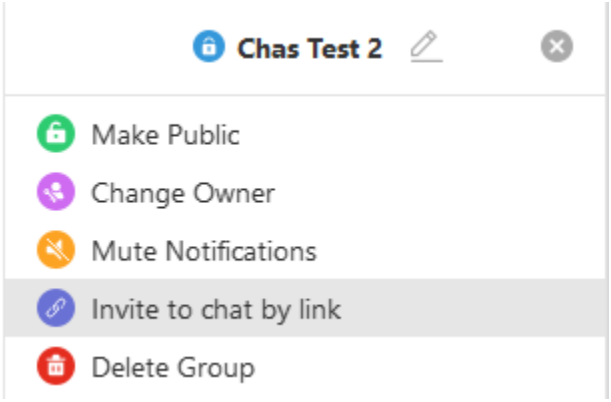
2.10.1 Invite external party to Chat session

This feature will allow you to send a link to an external party and have them join the Chat session.

Click the Info button in the Chat session:



Select Invite to chat by link: (the link will be copied to the clipboard.



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

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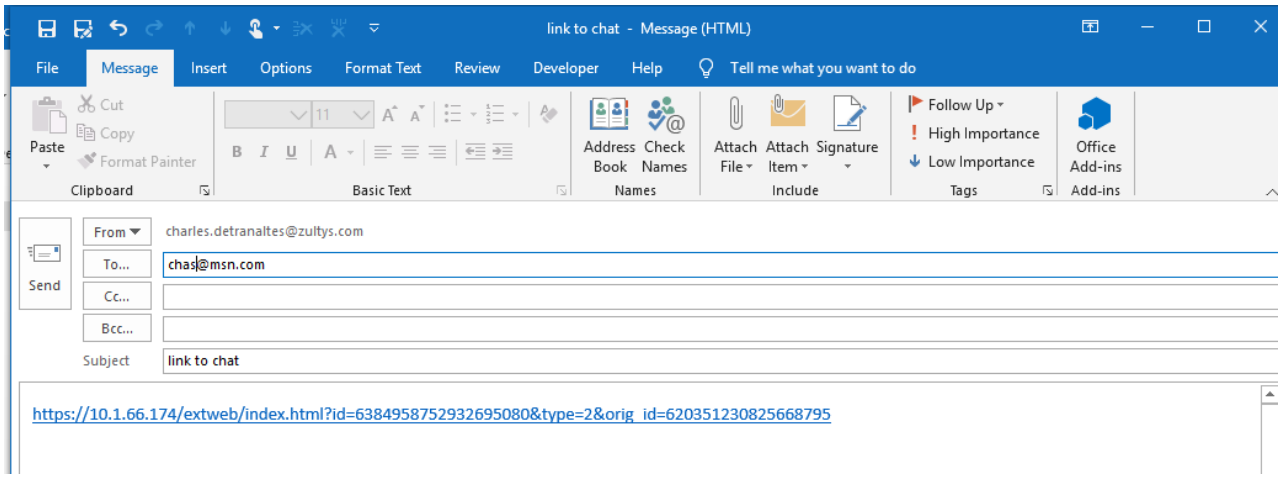
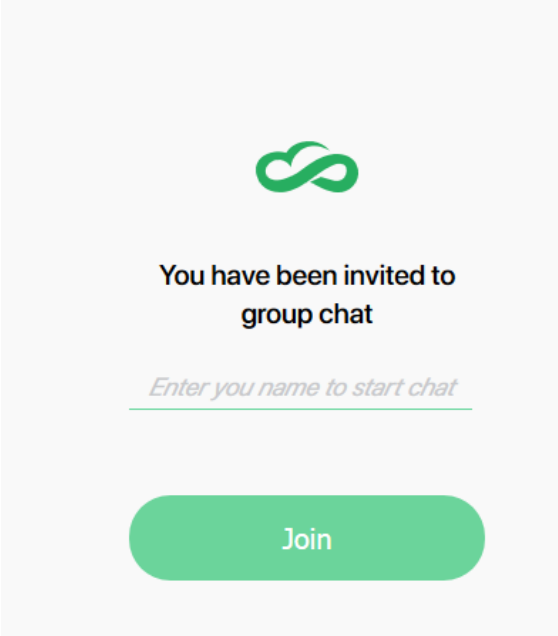


When the external party clicks the link, they will receive an invite in their web browser:



Enter their name and click Join.

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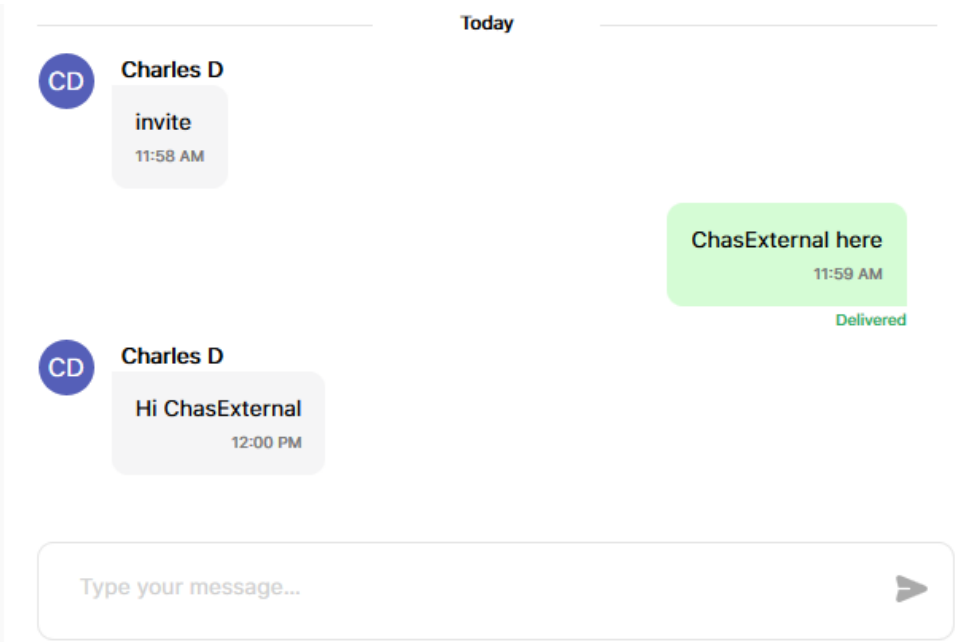
The external user will receive a web based Chat screen and will be able to send and receive Chats to the group:



NOTE: The external chat link remains active for 24 hours. You will be notified if an external party joins/leaves the group. If you need to disable the link you must delete the group and recreate it.

2.10.2 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.

2.10.3 Chat session

While in the Chat group or user chat, click the share screen icon

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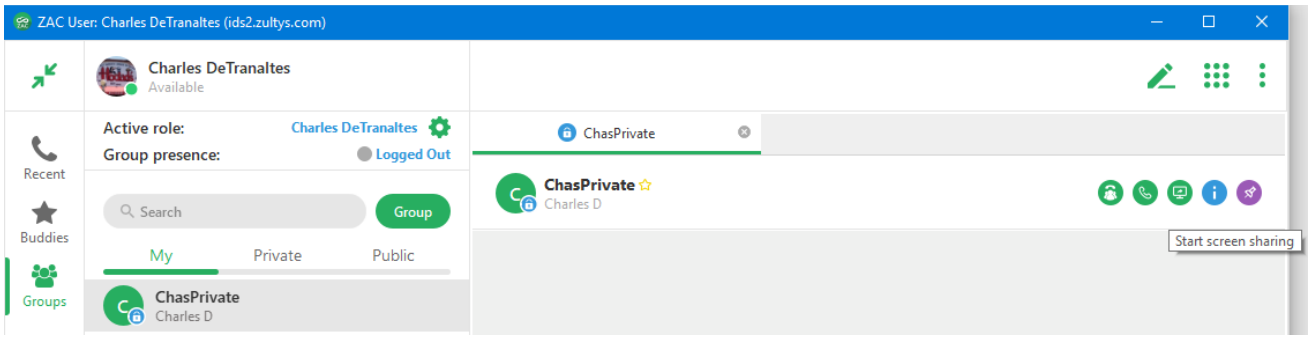

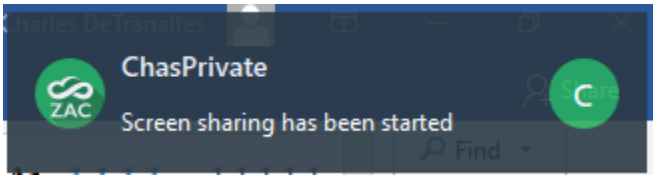

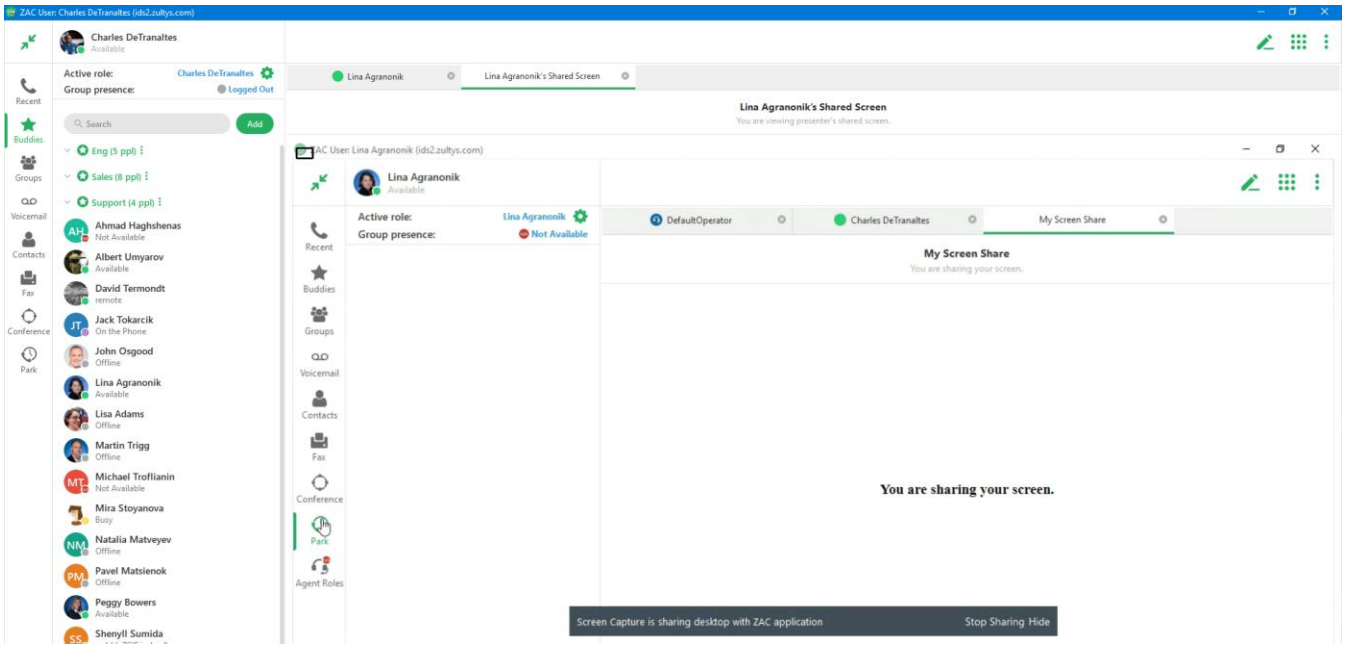

Users in the Chat select the Join screen sharing session to view the presenter's screen:

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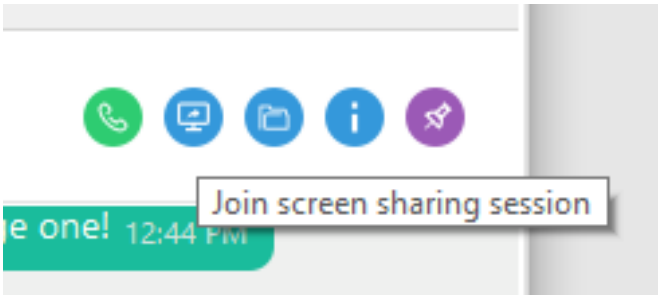
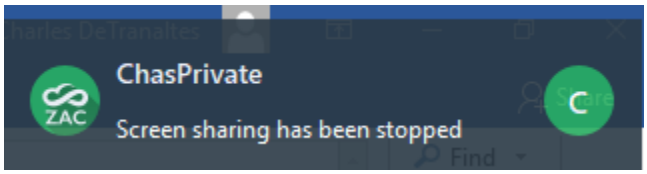


When finished, the presenter clicks the end screen share icon to stop the screen share session.

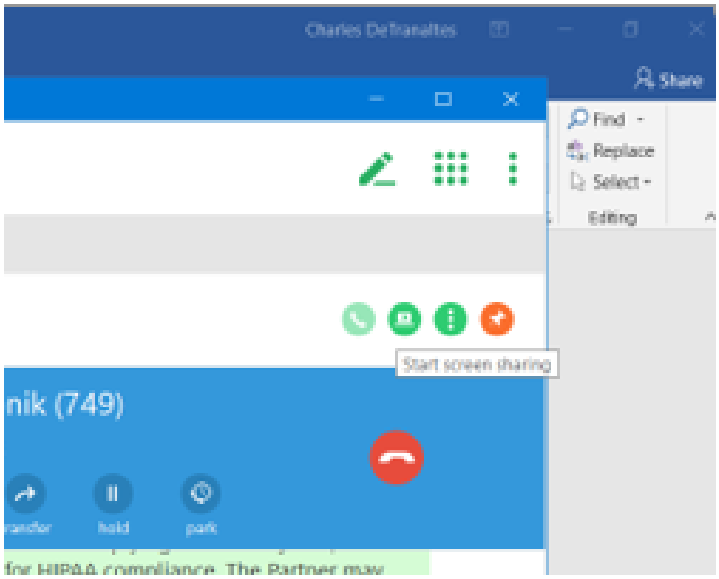


Not that the screen share supports from one presenter to other members in the chat only.

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

2.10.4 Call session

While on a call, click the Start screen sharing:



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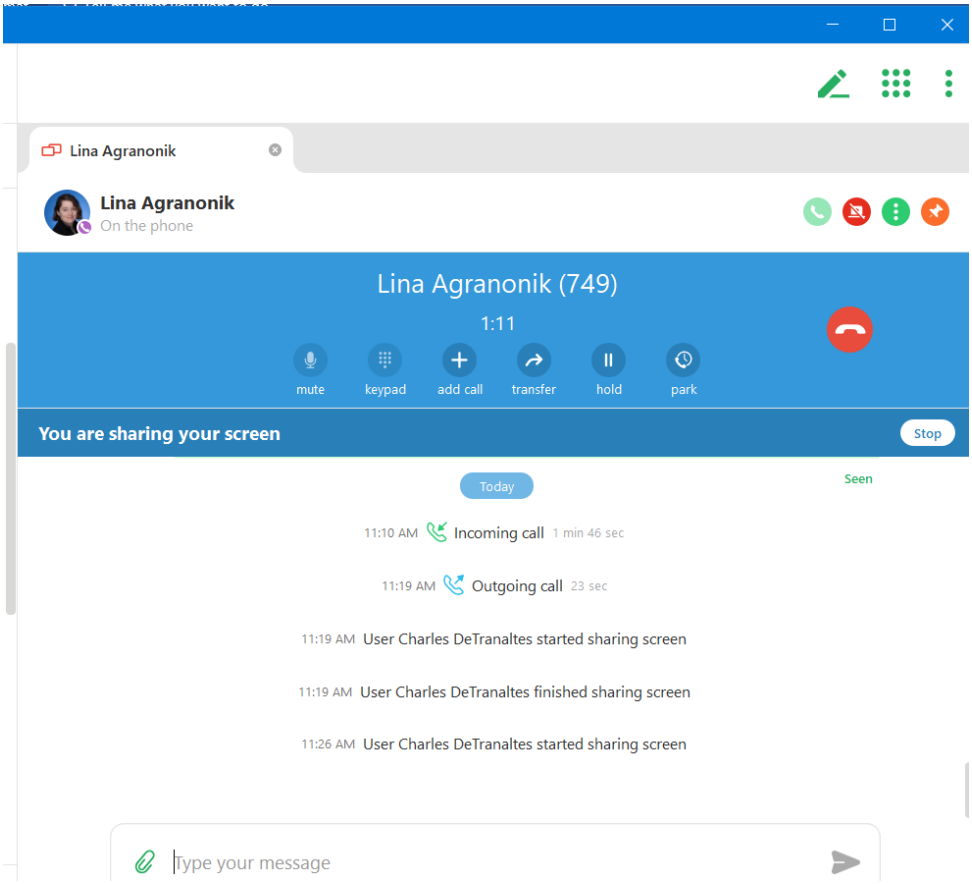
The user will be viewing your screen.



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

3 File Transfer

File transfer can be used in private(user to user) chat sessions. File transfer allows you to send a file to another user. 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.

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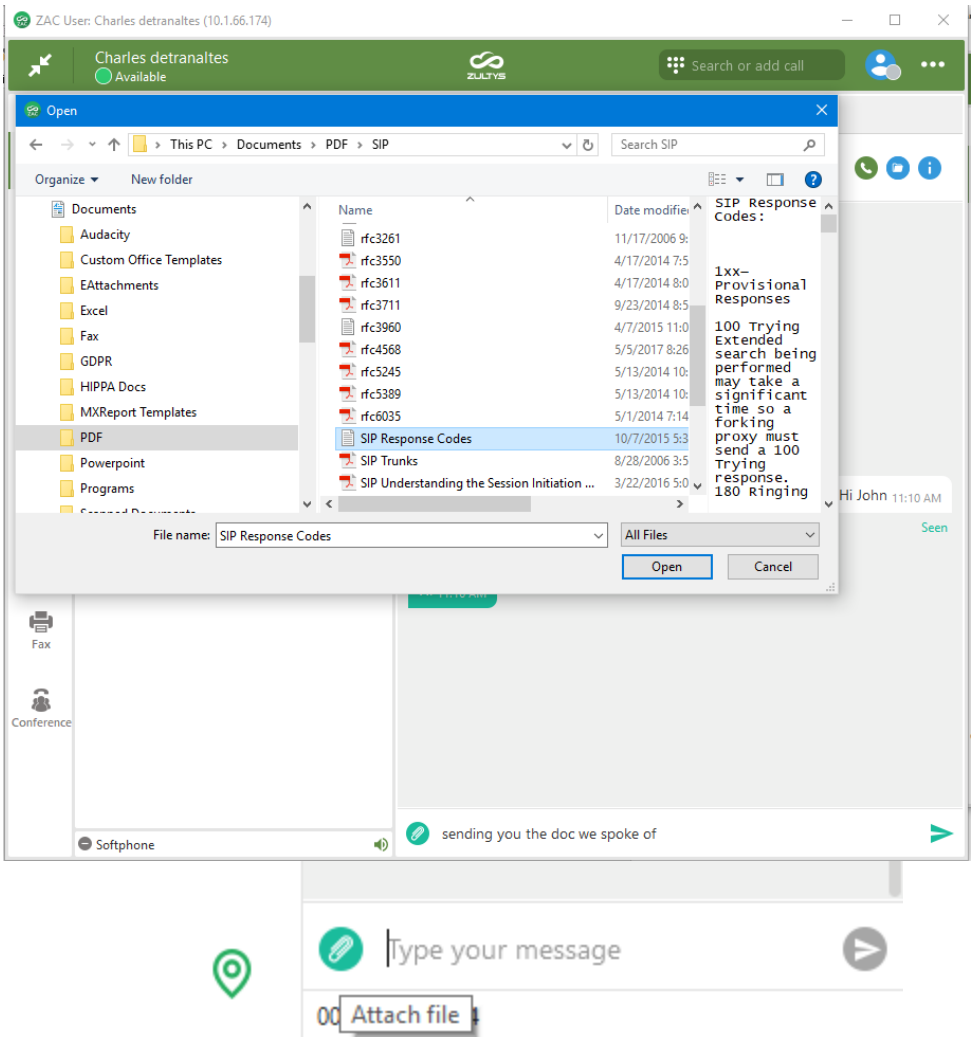

A file explorer window will open. Navigate to the desired file.

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

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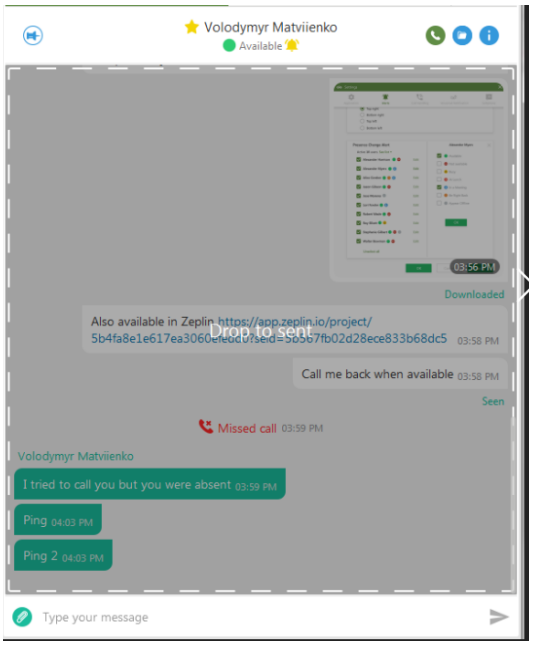
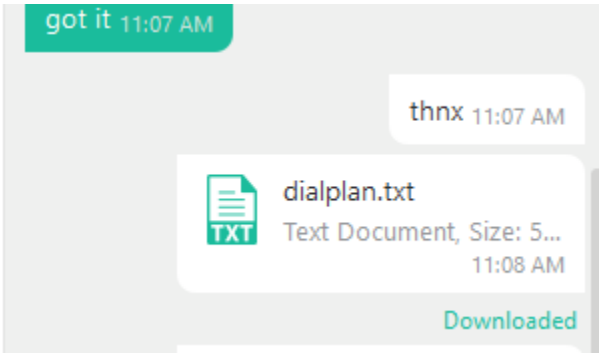


The user will receive the file.



The user can accept or decline the file.

If the user accepts the file:

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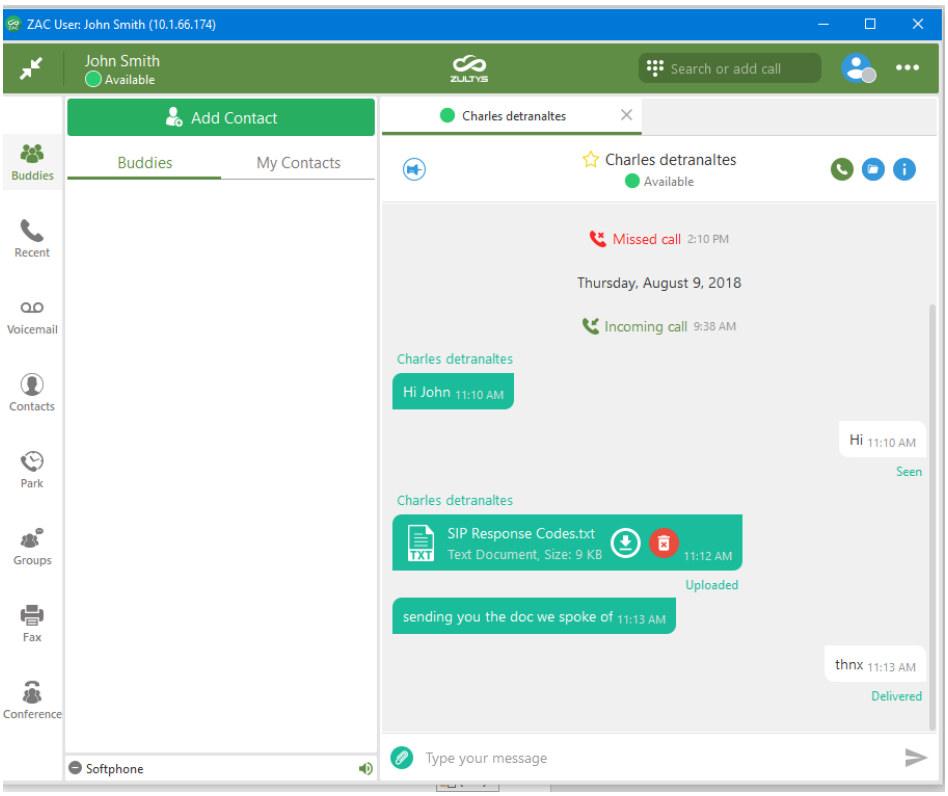
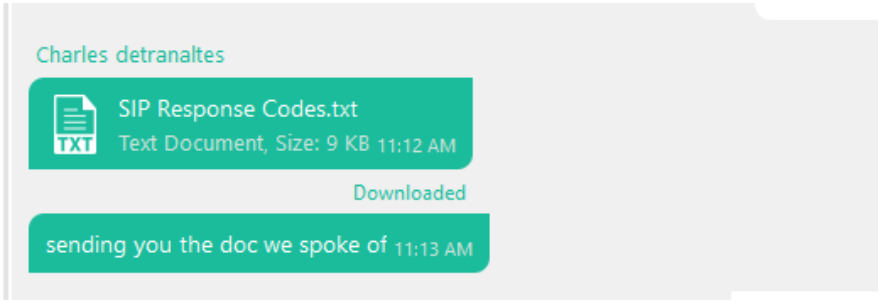
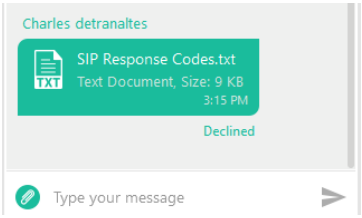




If the user declines the file:

Sending user decline message:



Receiving user decline message:

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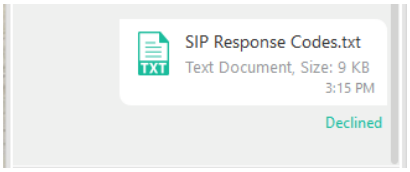
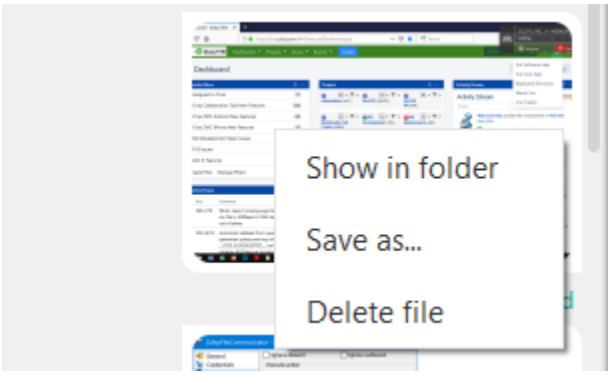
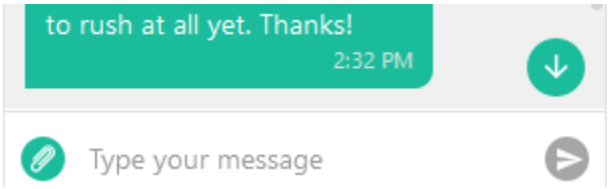


Once the user accepts the file, they can view the file in the saved default location, save the file on their local PC to a location of their choice, or delete the file.

Right clicking on the file will display the options:



If there is more content/information in the chat window, a down arrow will appear to allow you to display more conversations.



3.1.1 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.

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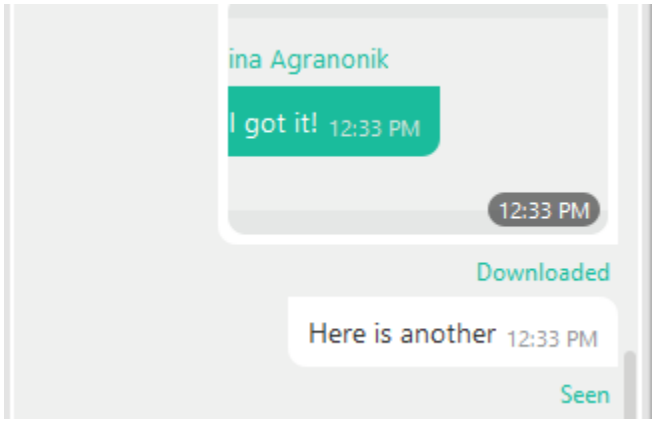
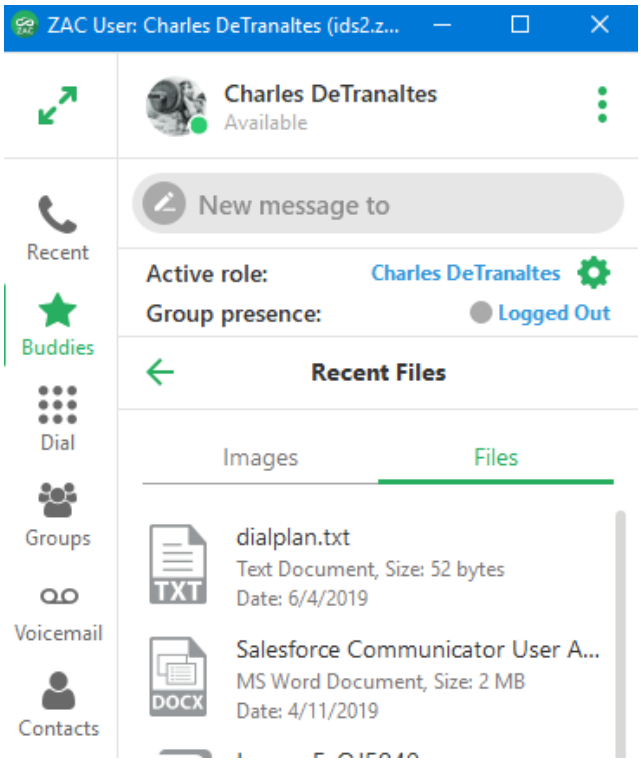


3.1.2 Recent Images/Files

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 Recent Files



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

Note: File transfer size limits:

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

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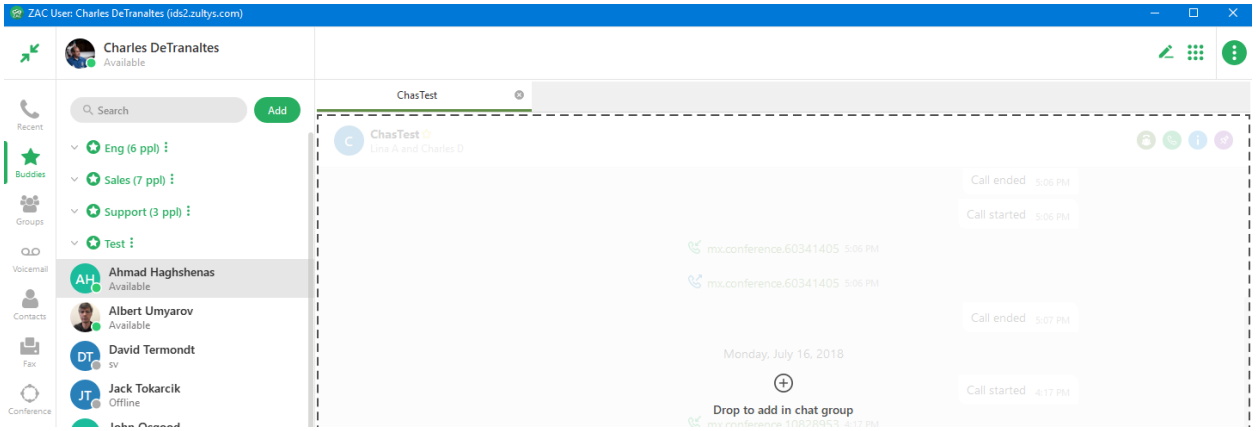
3.1.3 Drag and Drop Operations(full screen mode)

You may create a private chat group by dragging the 1st user to the 2nd user's tab (group will have 3 members and default name).

You may add a member to the chat group by dragging a user to the chat group tab.

You may add a member to a chat group by dragging the user to the Groups view.



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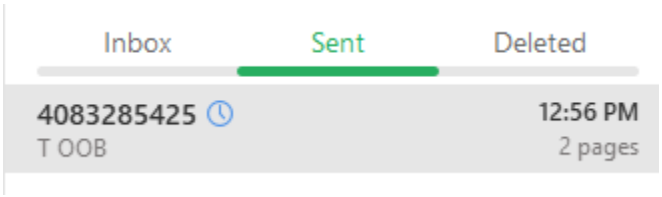
3.2 Fax

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

3.2.1 View:

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

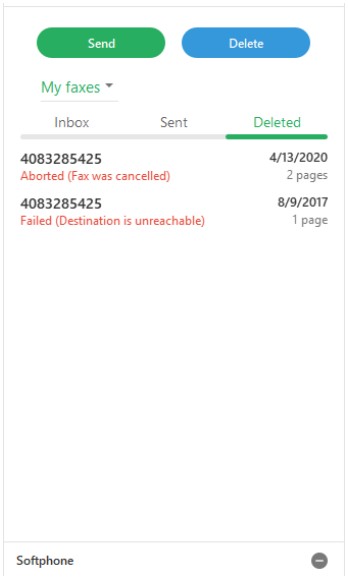


3.2.2 Delete

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

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

Click the Delete icon:



Select the faxes to be deleted or select Delete All.

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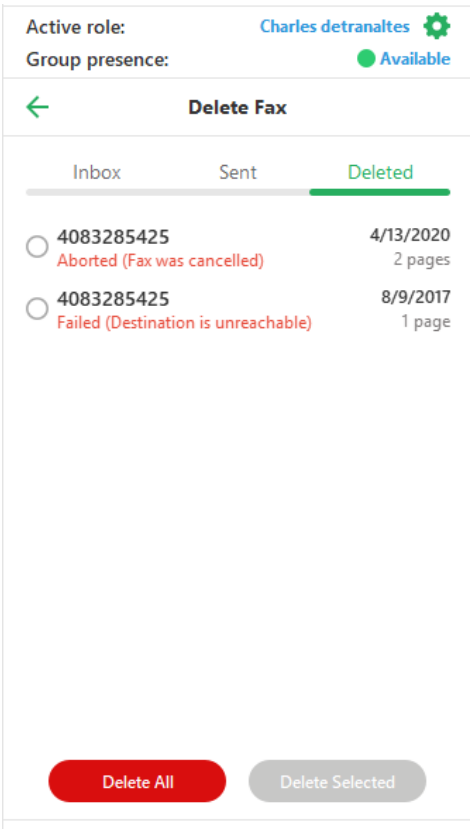
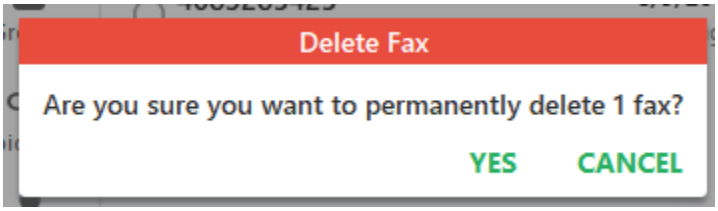


Click Yes at the confirmation:

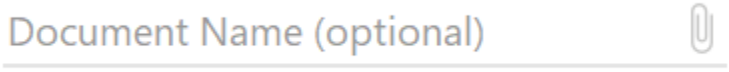


3.2.3 Send

Click Send to create a new fax.

Enter the fax number to send to and press ENTER.

Attach the desired file.



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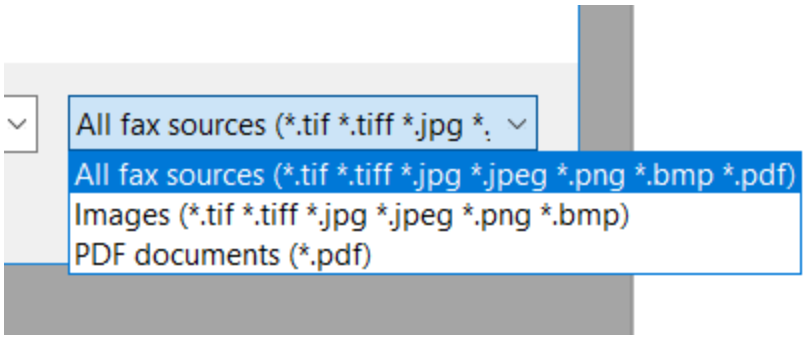
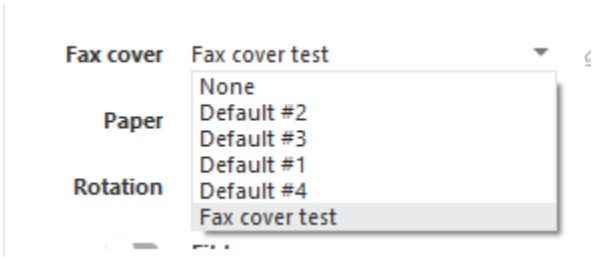


Note that only (.jpg, .jpeg, .png, .bmp, .tif, .tiff, and .PDF file types are supported).

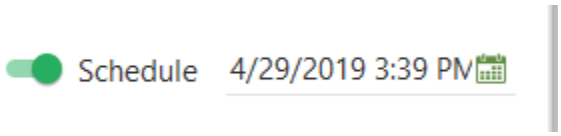
Select a fax cover page if desired from the list.



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.

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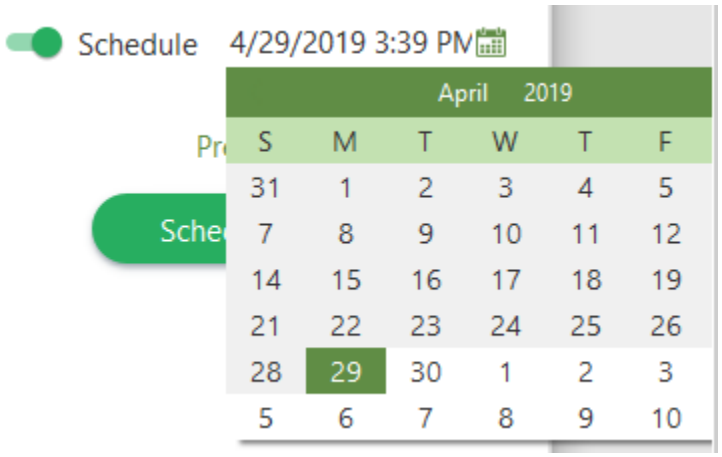


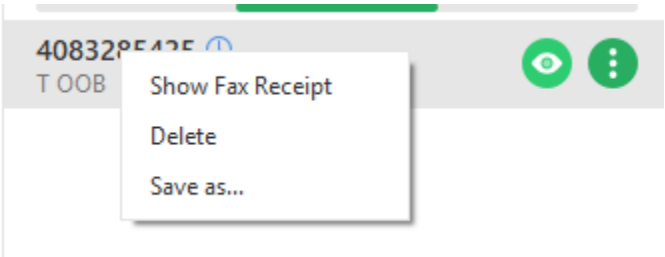
Click Schedule.

3.2.4 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

3.2.5 Print to Fax (Windows only)

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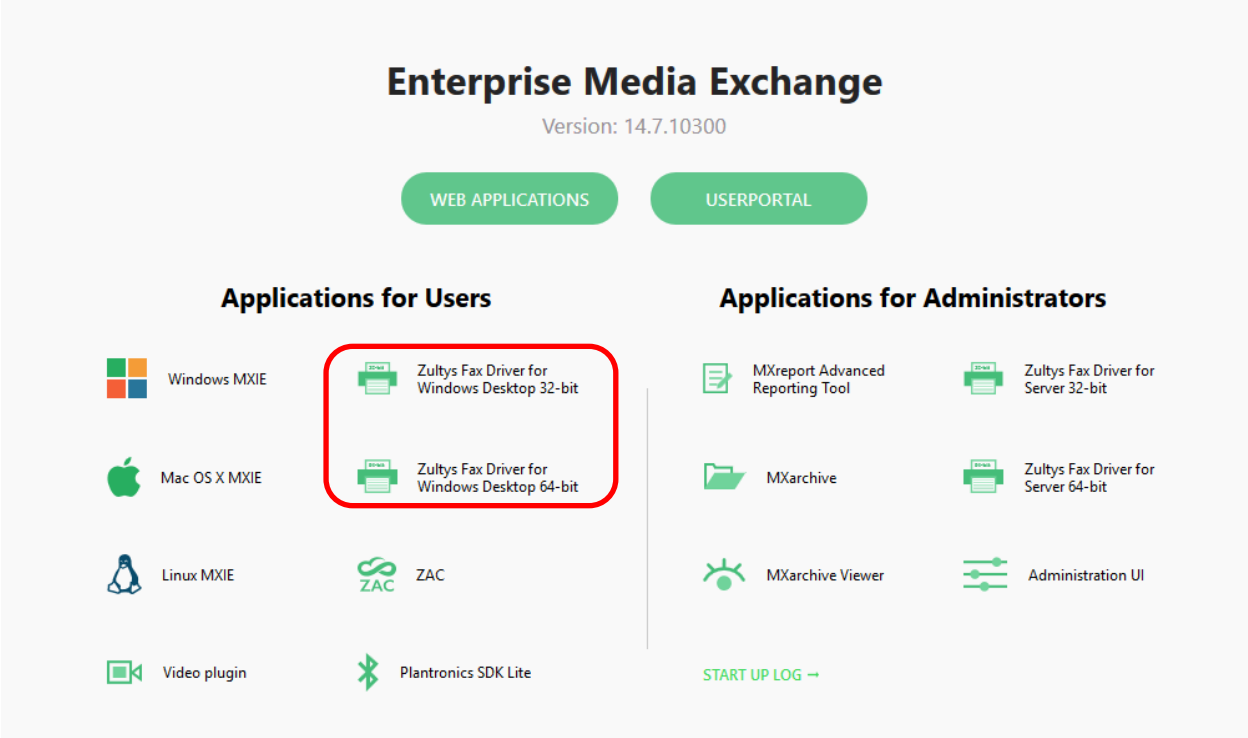
The Zultys Fax Driver will be used to install a printer on your Windows PC. The Zultys Fax Driver will install a printer named Zultys Fax to your PC. This printer will be available from your applications to be used to send the document to ZAC as a properly formatted fax file. Before installing the Zultys 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.



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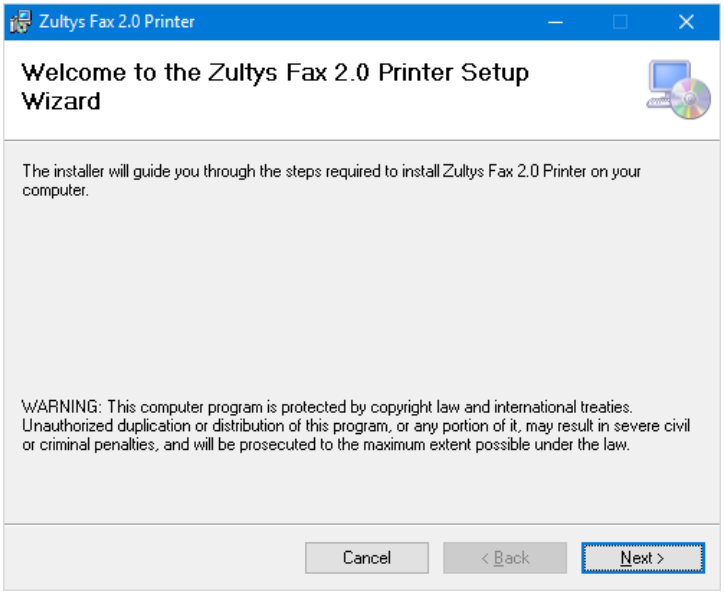
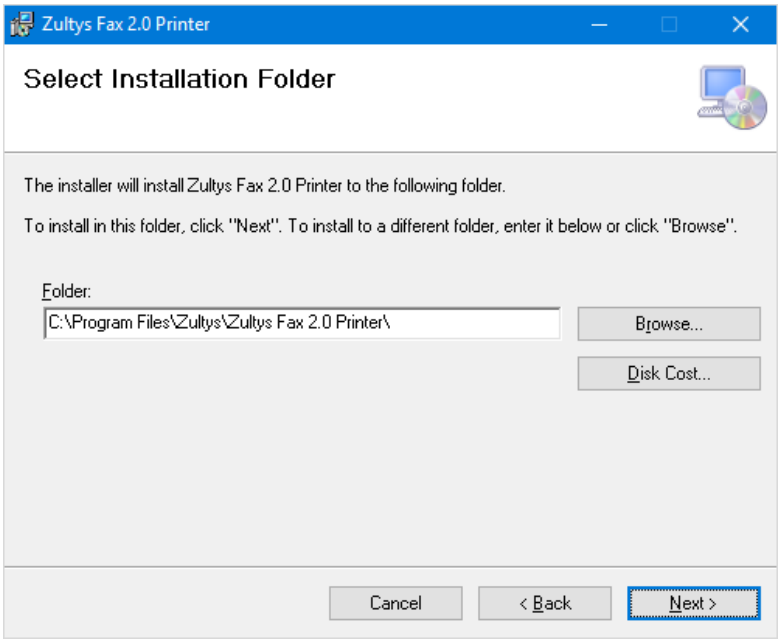
After selecting the appropriate driver, in this example we will use the Windows 64bit driver, double click on the downloaded file:



Click Next



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

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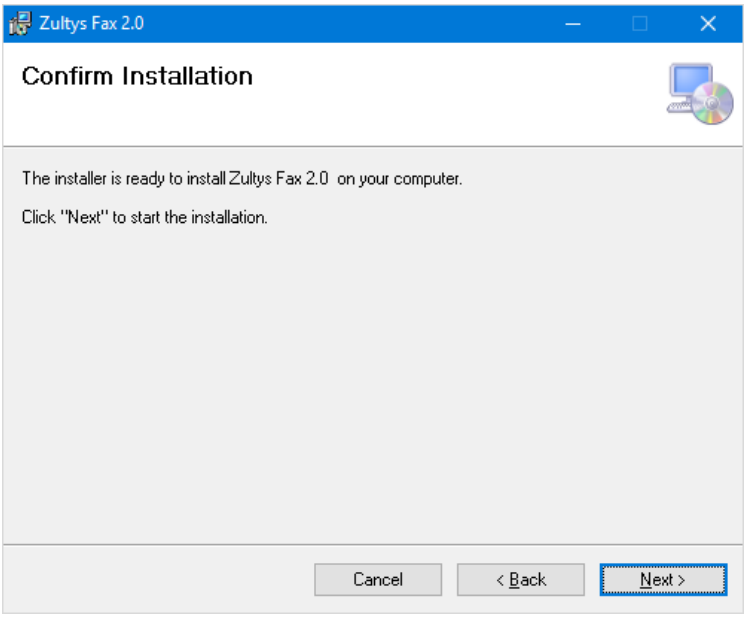
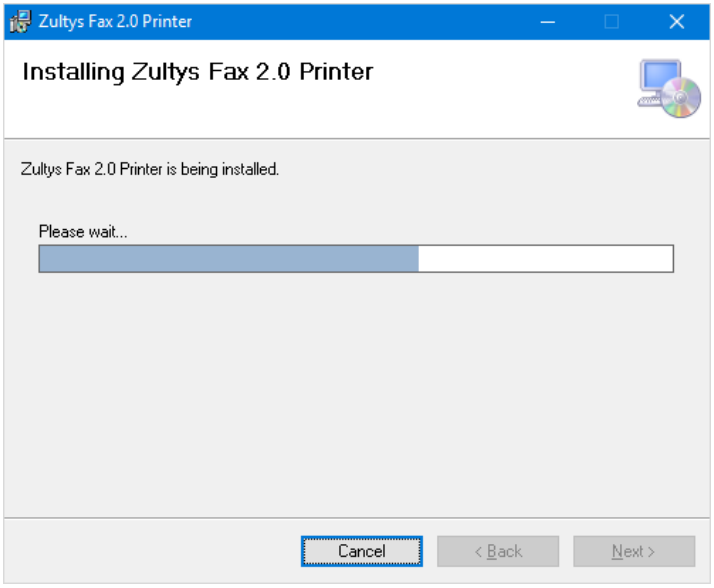


Click Next to confirm installation



After installation a confirmation screen is presented.

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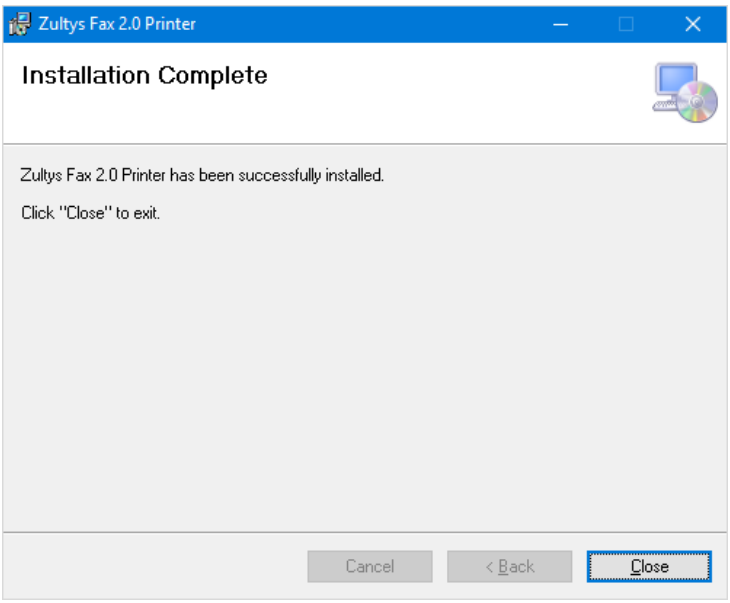
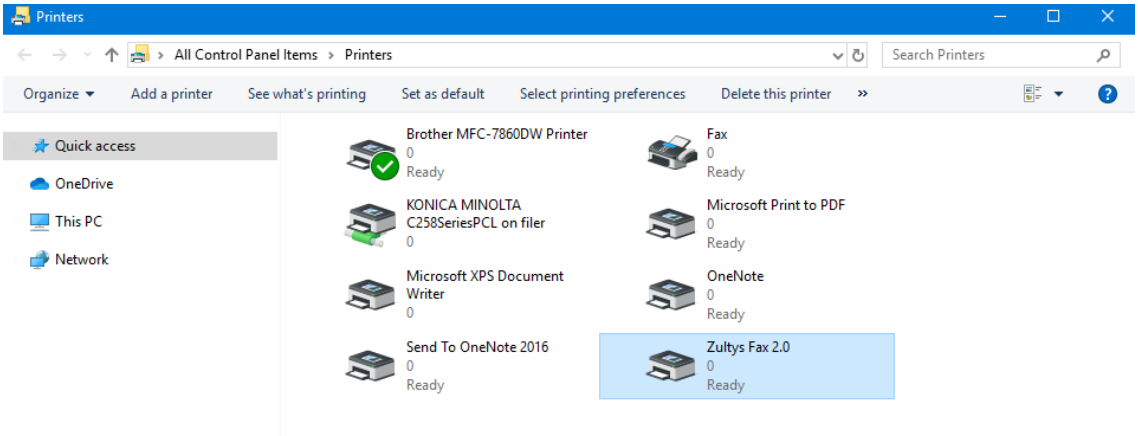


- After installation of the fax driver, you must re-open ZAC.
- To send a fax ZAC must be running.
- After the installation is completed, the **Zultys Fax** printer will be added to your system printer as shown in below.



3.2.6 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.

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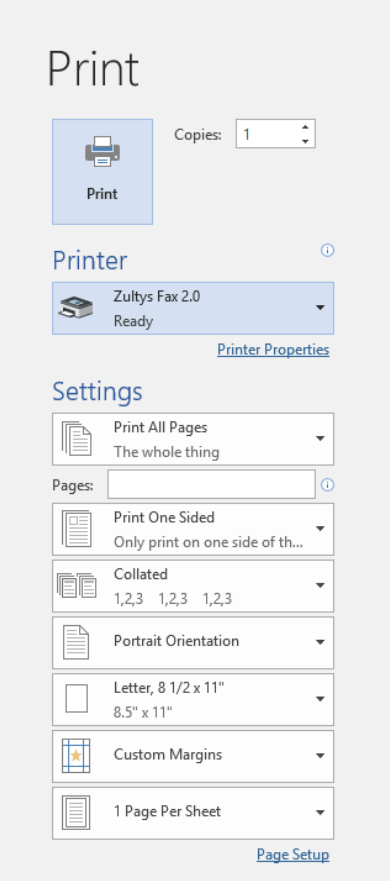

- After the document has been processed ZAC will notify you of additional steps required to send the fax as shown below.

- 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.

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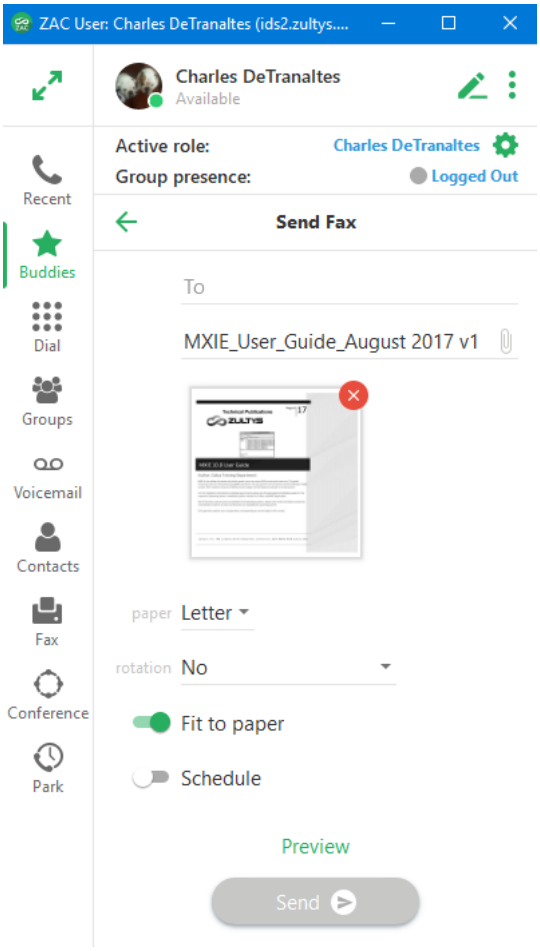

3.3 Conference

This area allows you to schedule an MXconference as well as launch the MXmeeting application.

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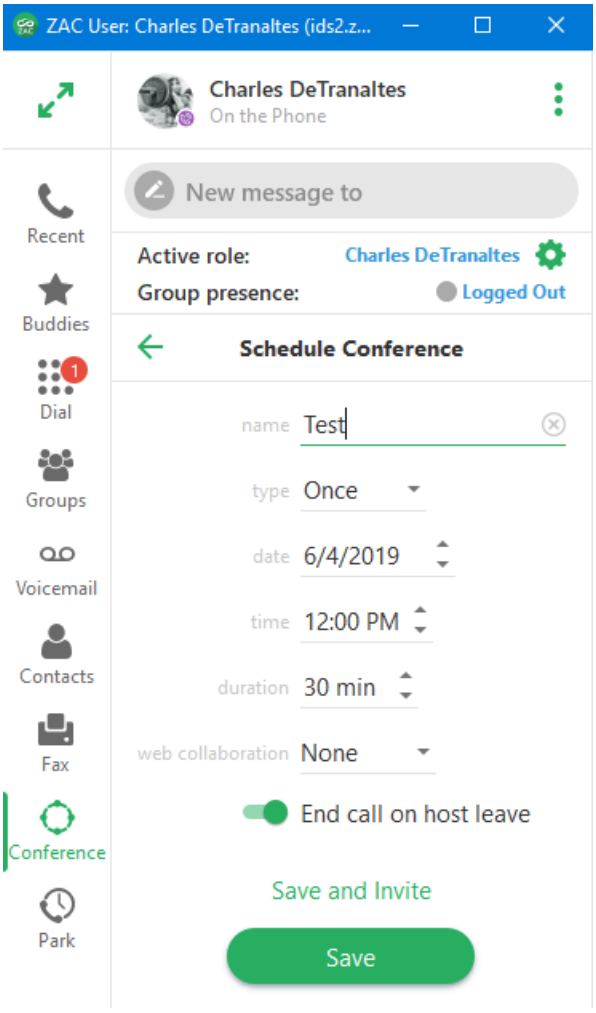

To create a conference:

1. Click the conference icon.
2. Click Schedule.
3. Enter the conference name, frequency, date, time, duration, and web collaboration options.
4. Check if the conference is to end when the host leaves.
5. Click save and invite. An e-mail template with the conference information will be presented. Enter the desired recipient's and send the e-mail.
6. Click Save to create the conference without sending invites.

Example of an Outlook calendar invite:

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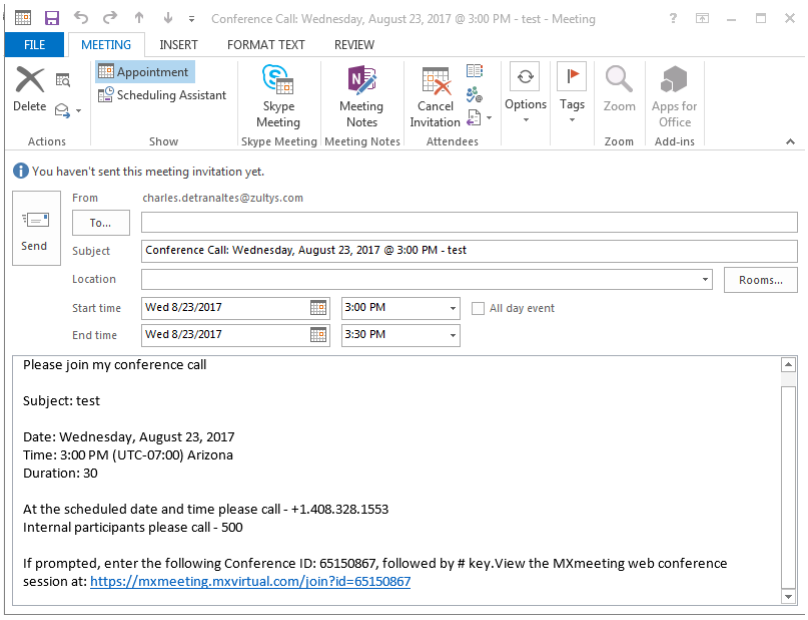


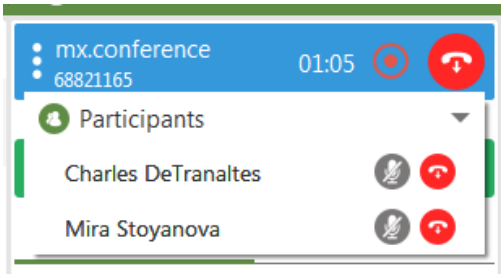
To start the conference:

1. Click the desired conference.
2. Click the start icon
3. The audio will be connected and MXmeeting will launch if collaboration was selected.

You can mute or disconnect participants as the conference owner once the conference is started.

Click the icon to display the Participants menu.

Click Participants



Once a conference is created, you are able to start, edit, invite users, or delete the conference.

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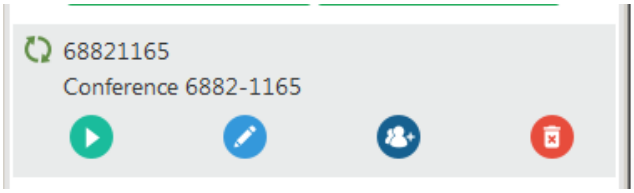
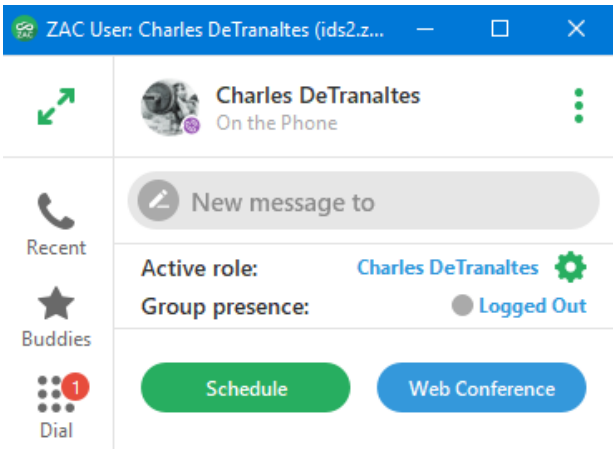
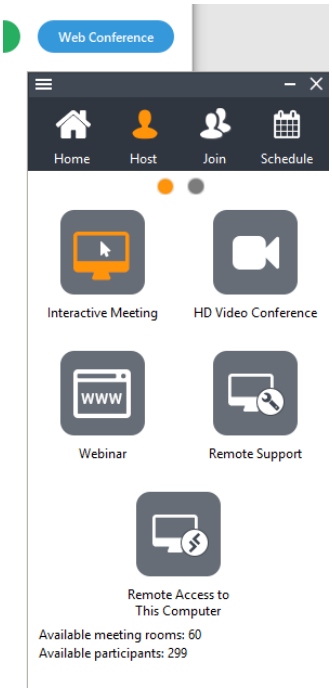


3.3.1 Web Conference

This feature allows you to start the MXmeeting application if it is configured.



Click Web Conference. The MXmeeting application will launch:



Refer to the MXmeeting user guide for MXmeeting operating instructions.

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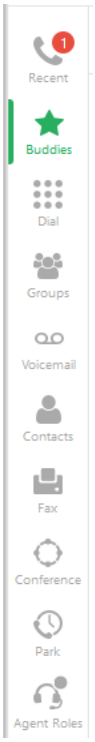
3.4 Notifications

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.

Activity notifications apply to the following areas in the program:

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



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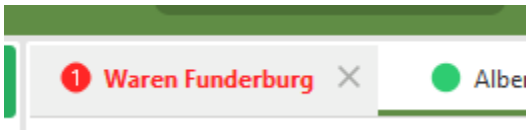
Notifications are displayed by the filter selected within an area. For example, in Recents you can filter by All, Calls, Messages. If you have the Messages filter selected, the notification screen will display notifications for messages. If the Calls filter is selected, notification will display notifications 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.



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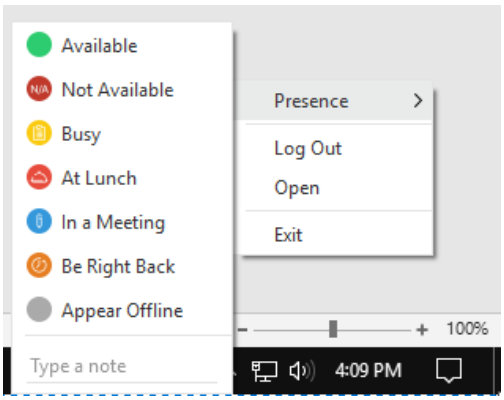
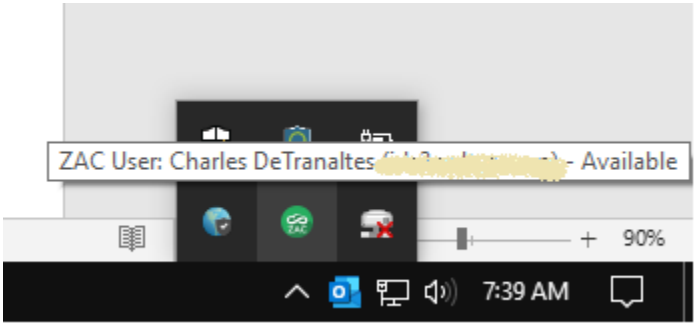
3.5 System Tray and Taskbar Options:

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

Right click on the ZAC icon in the system tray:





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

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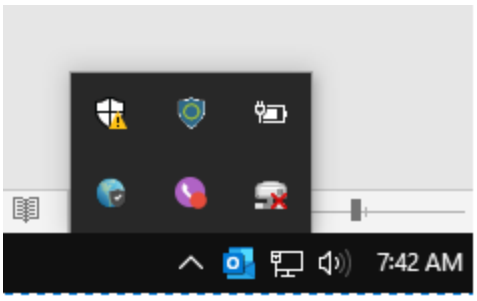
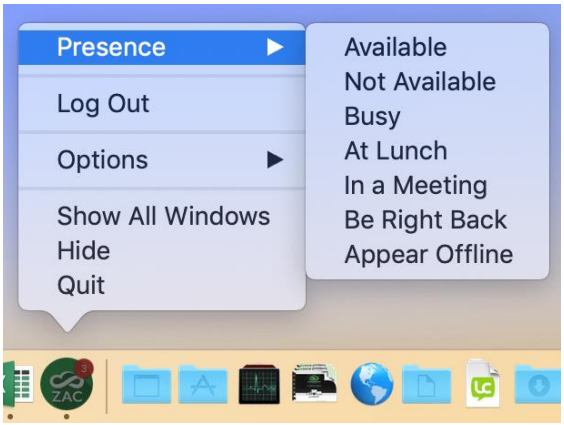


The icon will change to reflect the current presence status (on the phone shown)

Windows



Macintosh

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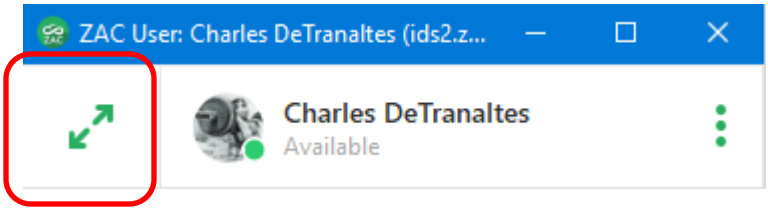
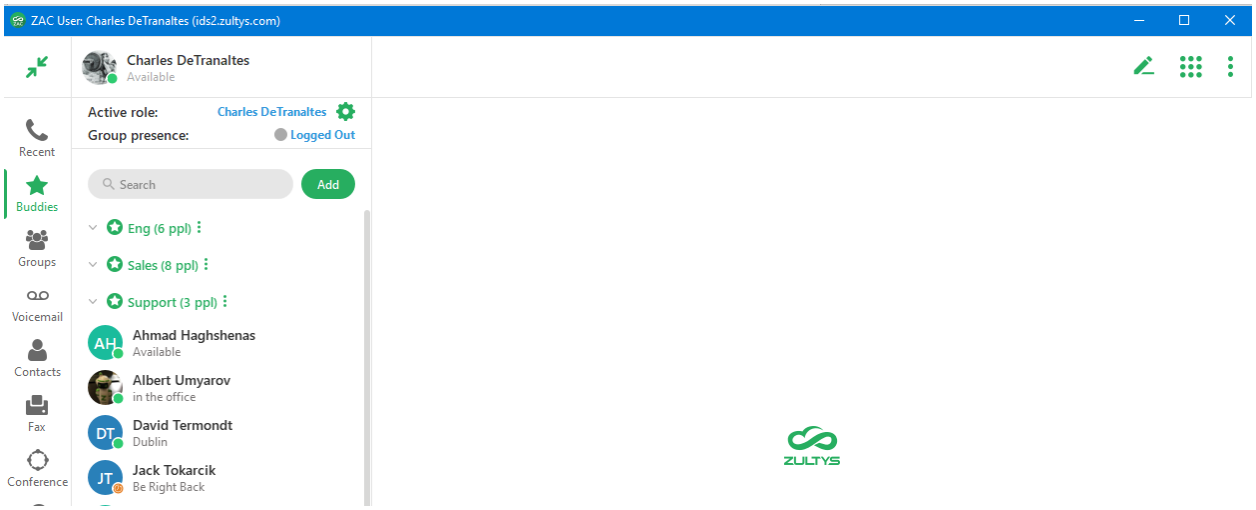
4 Full Screen Mode

The Zultys Advanced Communicator provides a full screen (expanded) mode in addition to the compact (minimized) mode.

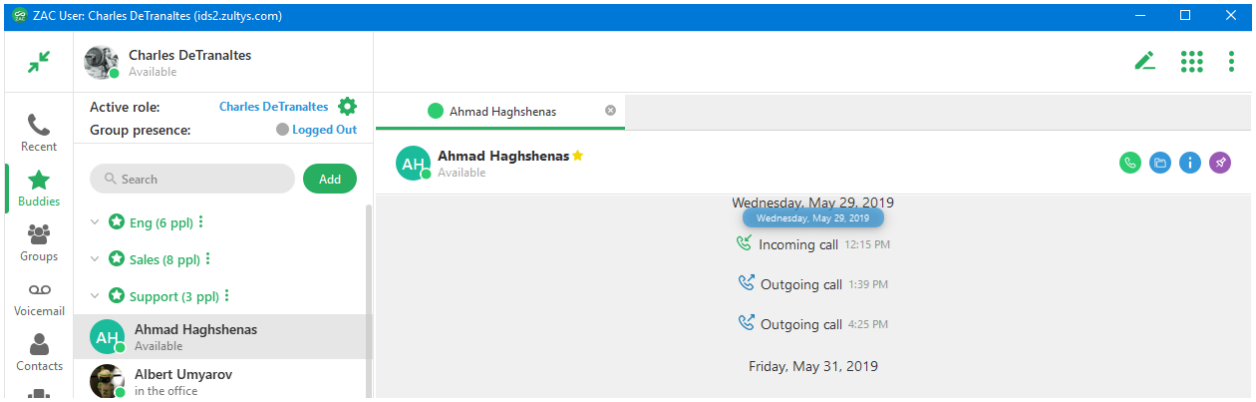
To toggle between the two modes click the resize icon in the top-left corner



The full screen mode will be displayed.



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



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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 icon.
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
- Display the recent images/files shared with the contact
- Display the recent activity for this contact

  You may e-mail from this screen, enable presence alert, call, as well as view the recent history for that user.

Note: 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.

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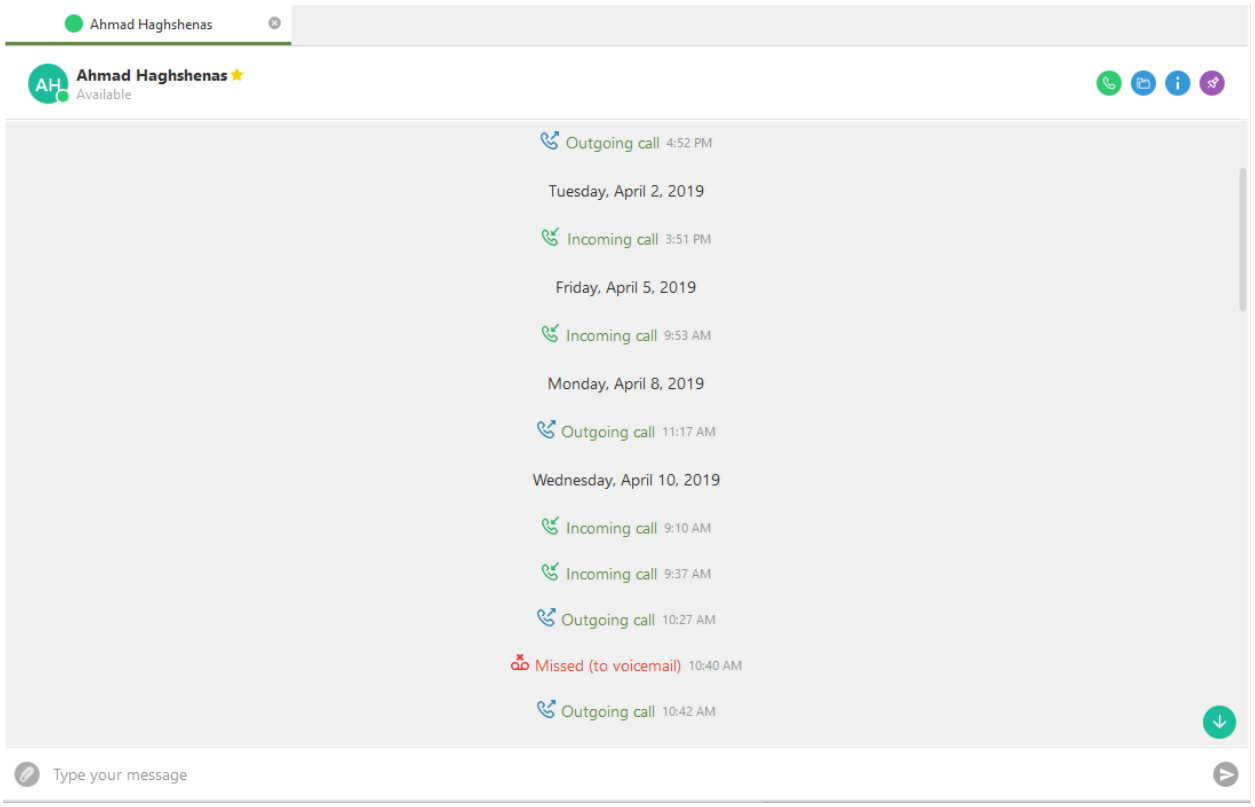

You may close the recent activity screen by clicking the X next to the contact name in the tab area.

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5 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.

5.1 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.

5.2 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.

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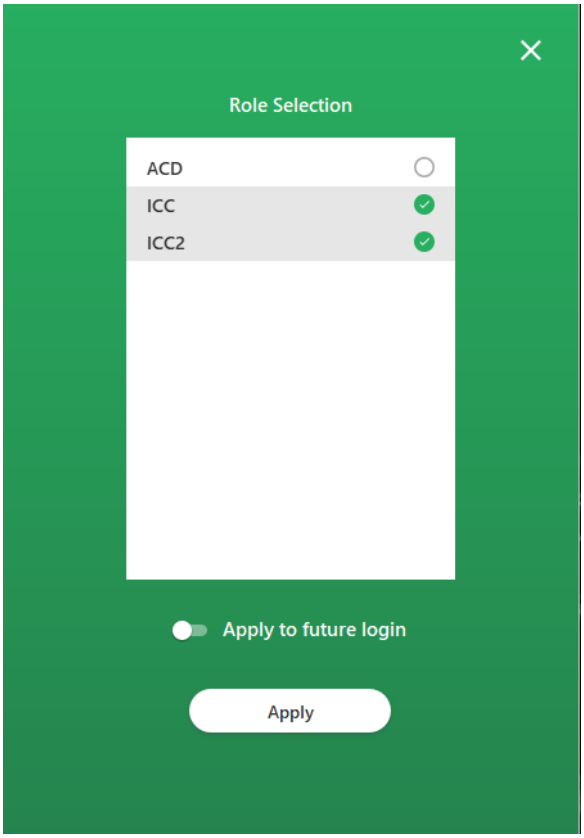
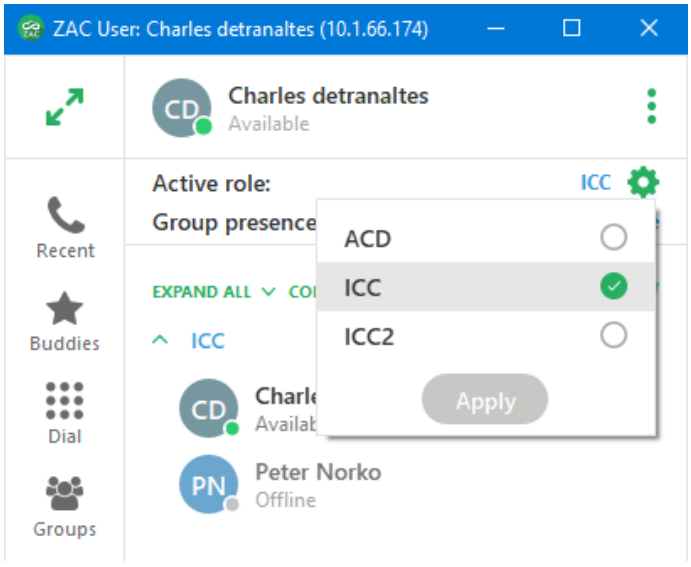


You may also select a role after you are already logged in in the Agent Active Role/Role Selection area.



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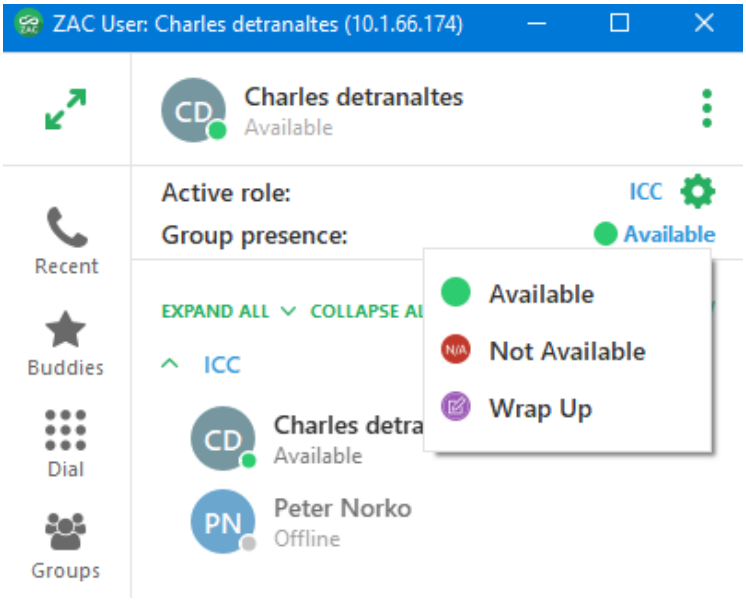
You may also select an Active role prior to placing an outbound group call.

Click on the displayed Active Role

Check the desired role to make it active

Place the outbound call.

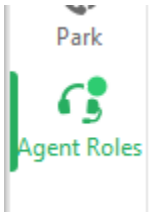
You can change your Group presence by selecting the desired presence state from the list.



The presence state will change after selecting a presence.

5.2.1 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:



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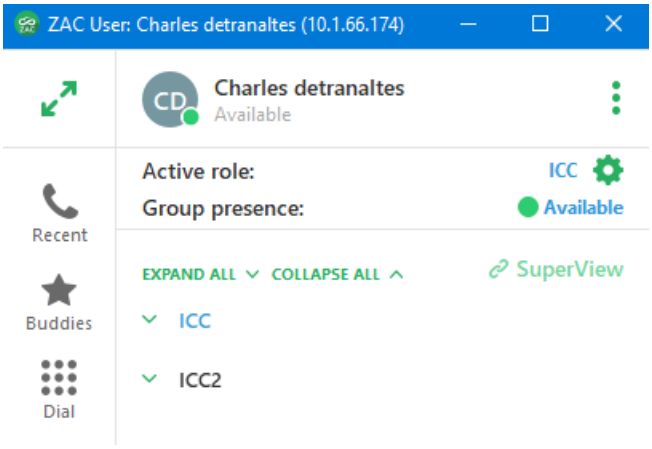
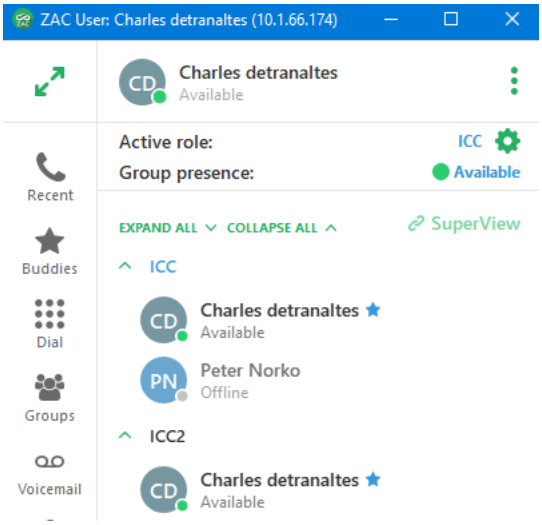


You may use Expand or Collapse all to view all agents for all groups.



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.

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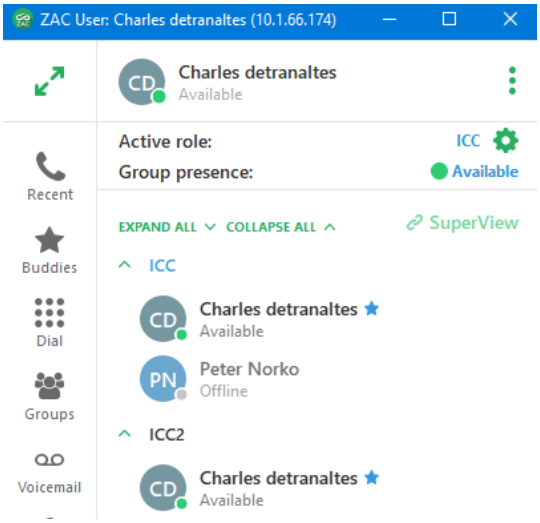
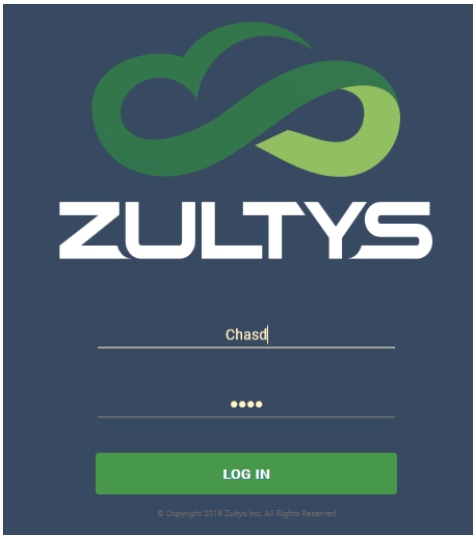
5.2.2 Supervisor functions

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:

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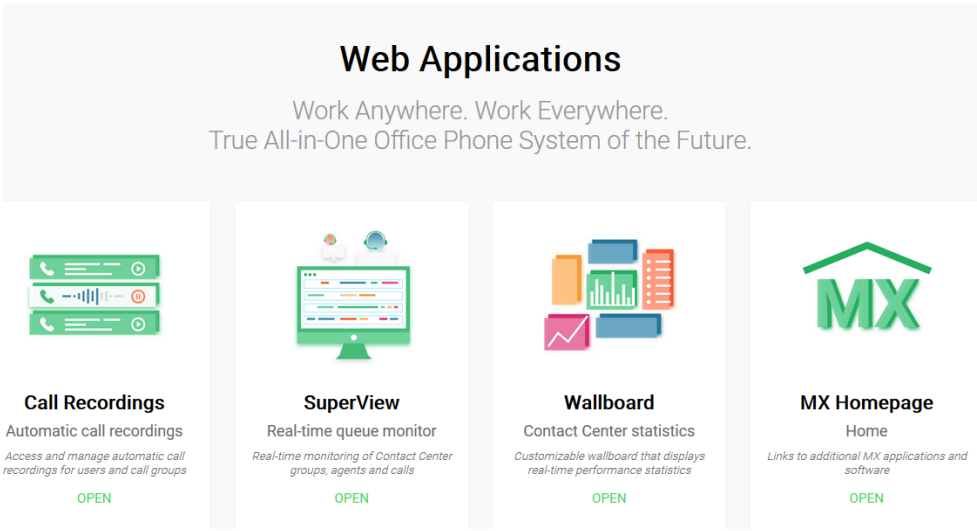
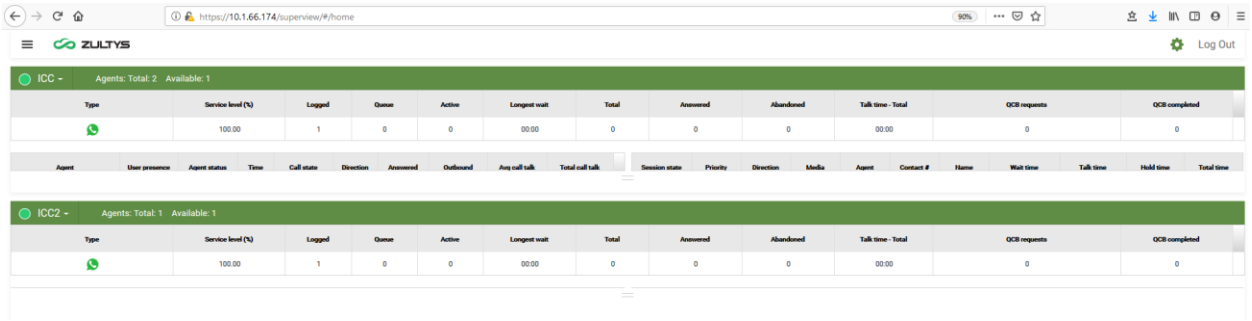
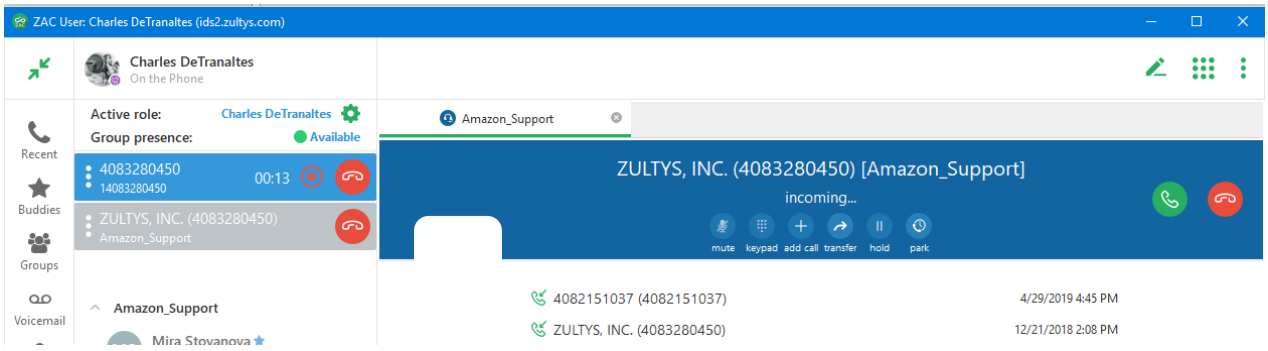


Click OPEN on the SuperView icon



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.

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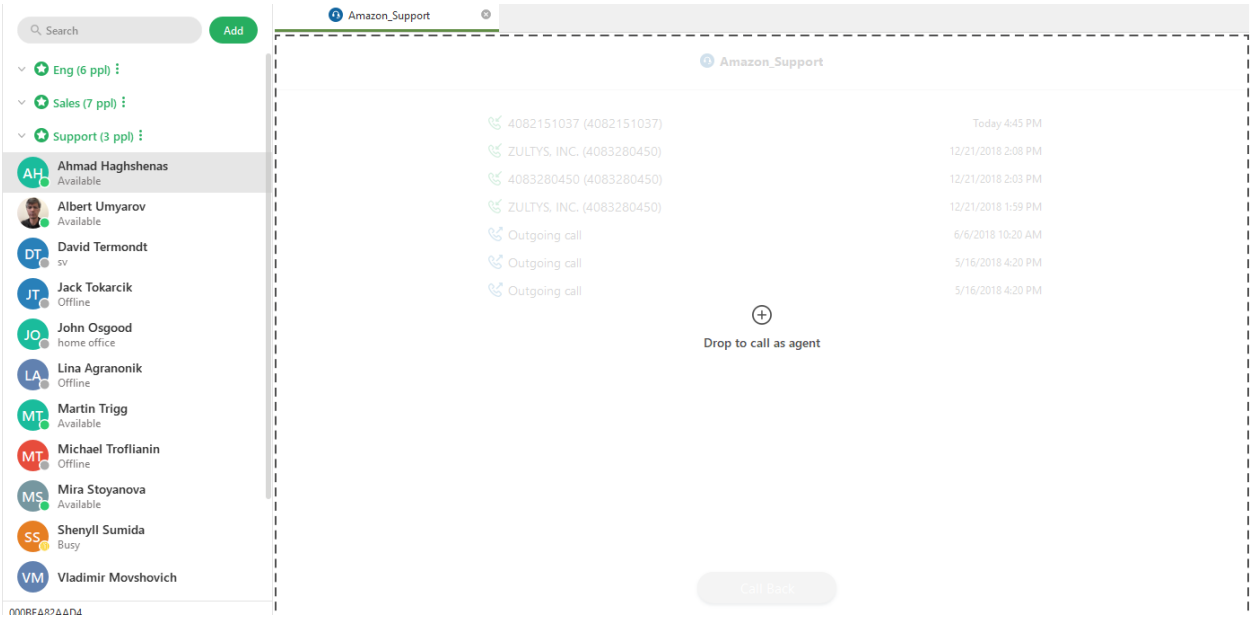
You may place a call as an agent by dragging the desired party into the Call Group History area. The screen will indicate place call as agent.

When you release the mouse button the call will be initiated to the desired user with you calling as an agent.



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6 SMS 2.0 Service

6.1 Description

Zultys SMS 2.0 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.

6.1.1 Requirements

- **ZAC Version** – Must be 5.0.0.37 (or greater)
- **MX Version** – Must be 15.0.3 (or greater)
- **Voice DID** – User must have a SMS enabled voice DID assigned.
  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.

6.1.2 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 for each user as described above (11 digit entry) In MX Administrator.
  Backend configuration work in this scenario is still performed by Zultys personnel.

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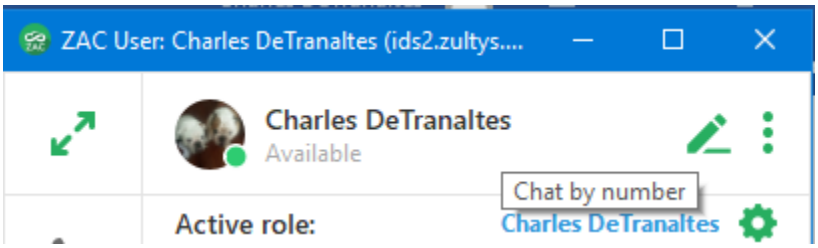
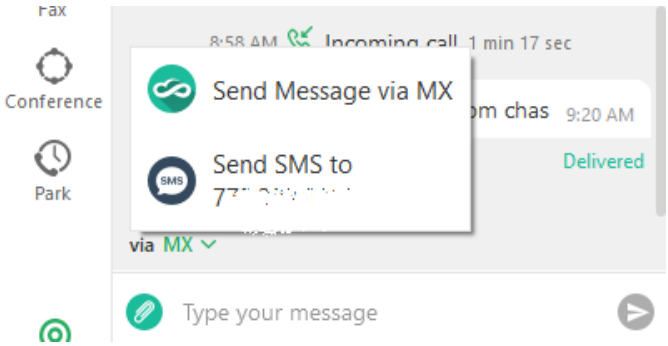
6.2 Operation

6.2.1 Sending SMS Messages

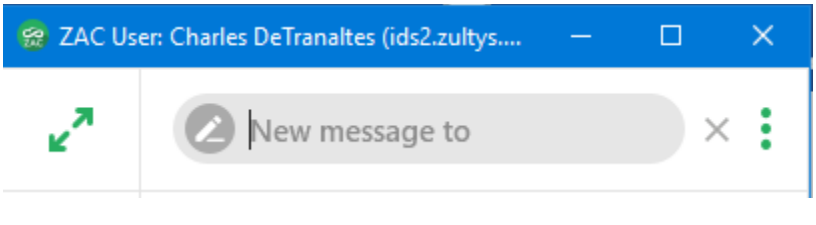
1. From the minimized or expanded mode click the Chat by Number icon.

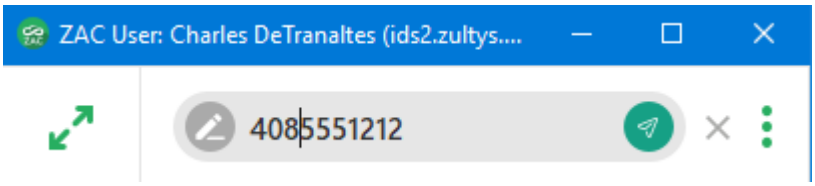


You may also start an SMS session from your buddy/contact history by select the via icon:



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.

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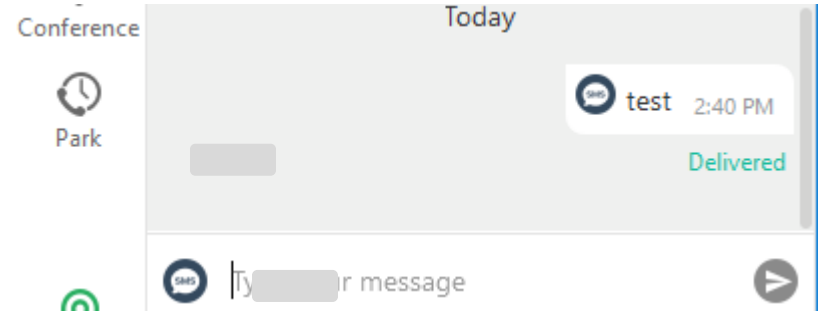
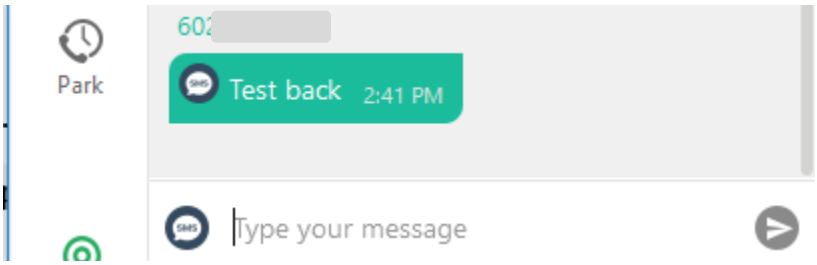
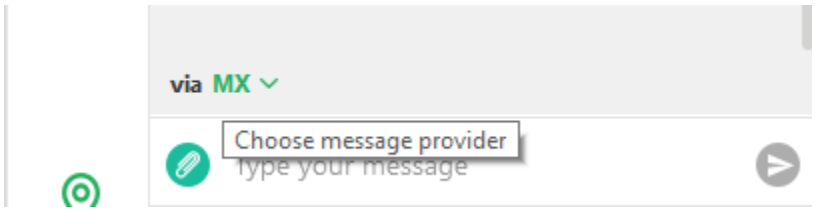
4. At the chat screen, enter your message and press .

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. If you mouse over the highlighted portion you will see:



Click the highlighted MX to select the desired message provider.

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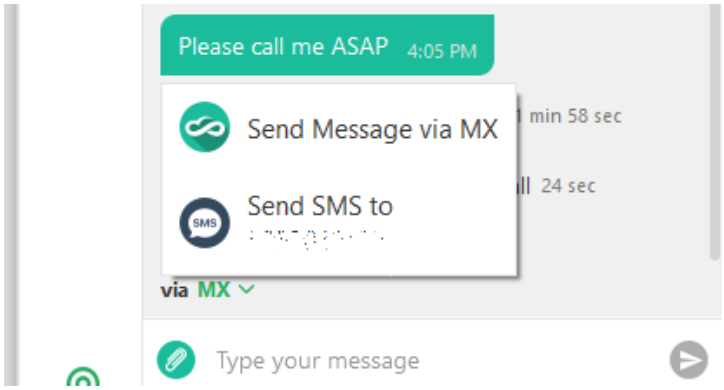
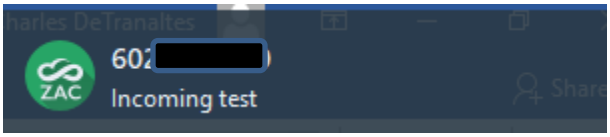


Select either the MX(internal) message or the SMS option to send to the users' mobile phone.

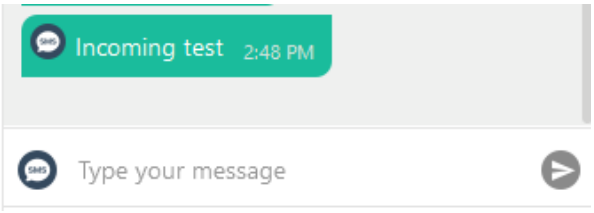
6.2.2 Receiving SMS Messages

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

1. When you receive an incoming SMS message, a popup 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.

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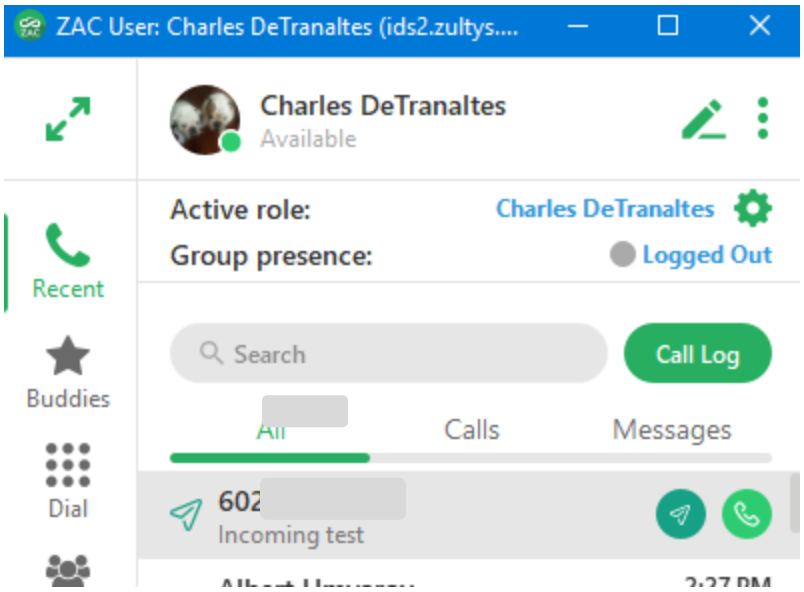
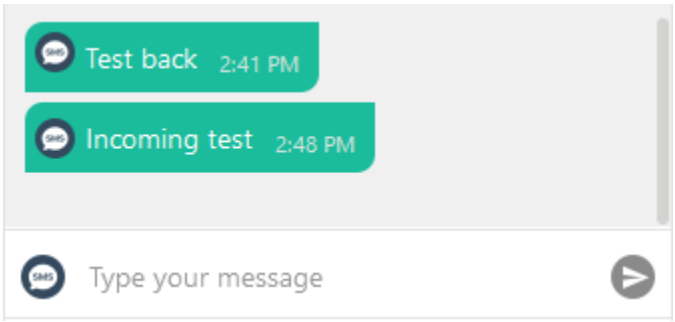


4. Click the icon to enter the Chat area.

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



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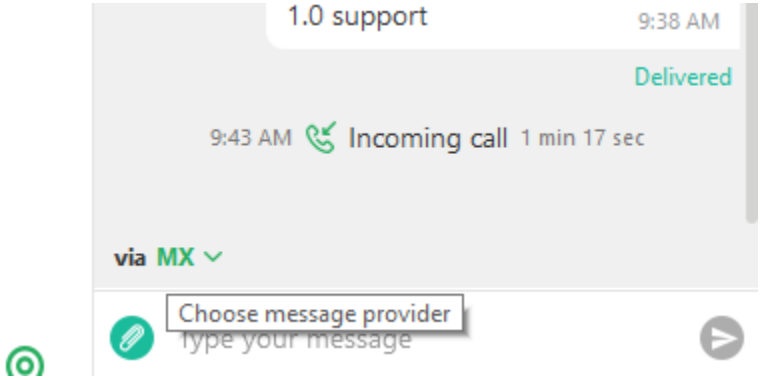
SMS service may also be started when the system



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7 Microsoft Office Unified Communications

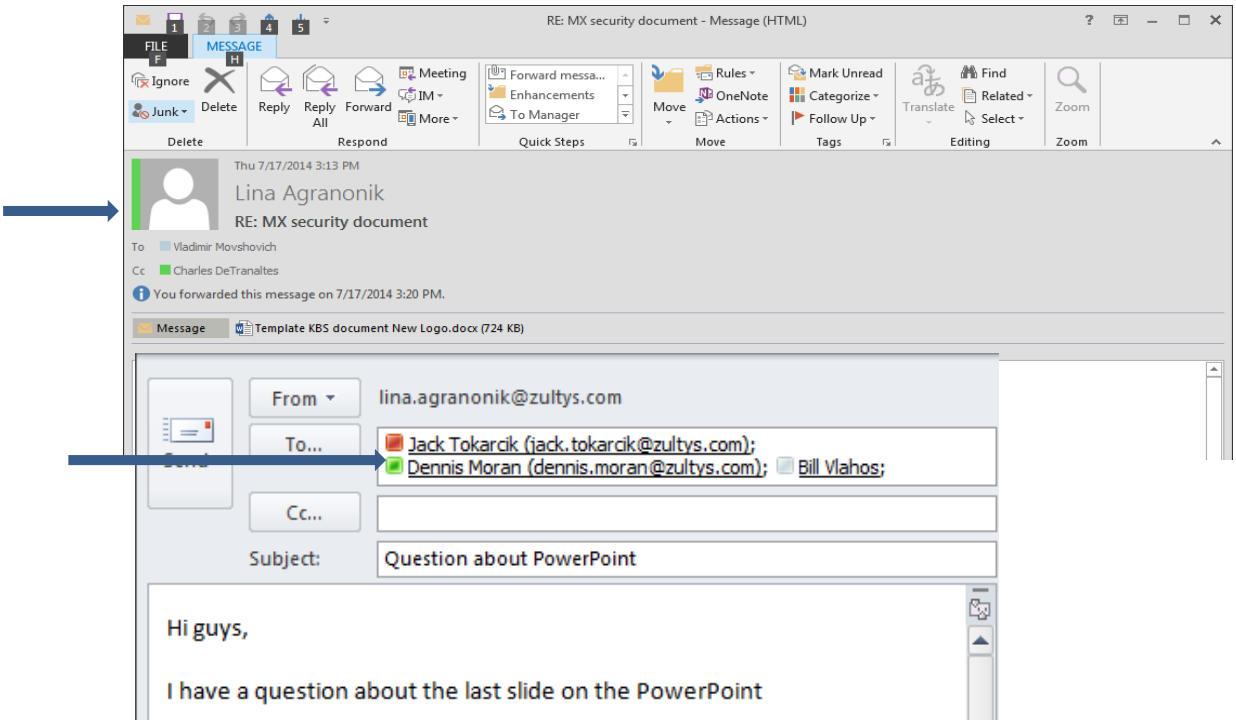
7.1 Description

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.

7.2 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.

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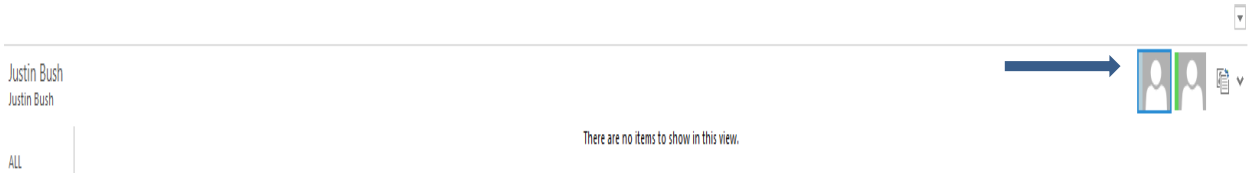
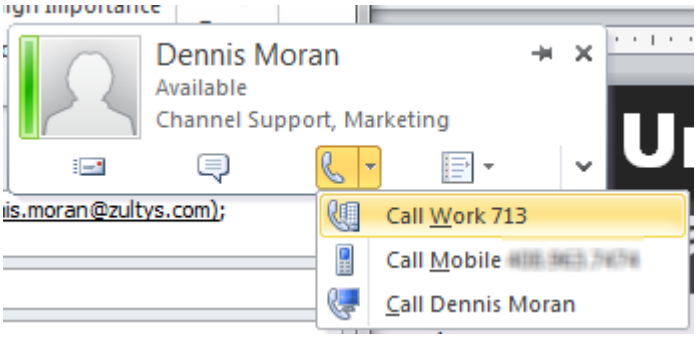
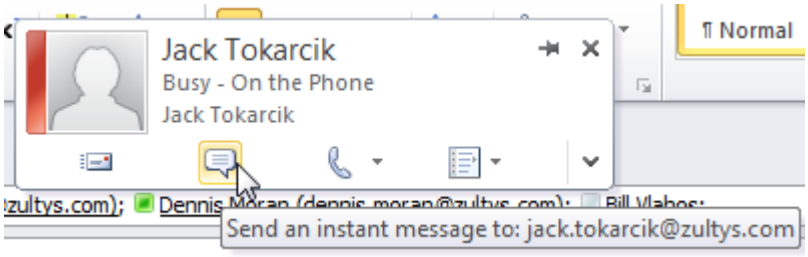


Moving your mouse over the presence area of a user will present the quick action menu:

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





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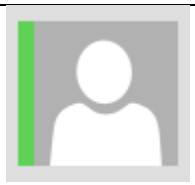
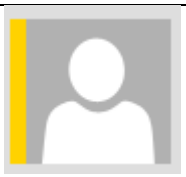
MXIE Presence Status	Outlook Presence Status
Available	 Available
Not Available	Do Not Disturb – Not Available
Busy	Busy
At Lunch	Away – At Lunch
In a Meeting	Busy – In a Meeting
Be Right Back	 Away – Be Right Back

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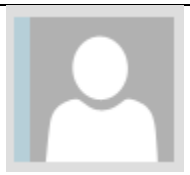
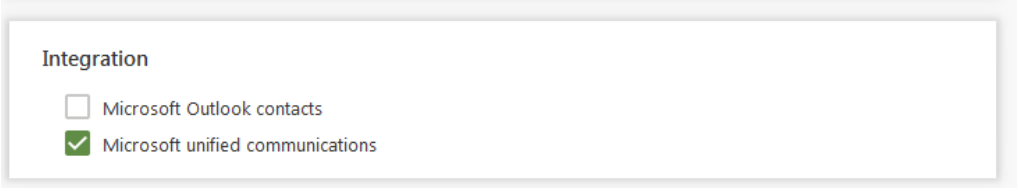
Appear Offline	 Offline

7.3 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

  Enable the checkbox and click Apply.
- Microsoft .NET Framework 4+ must be installed/active on the users' PC in order for this feature to operate properly.

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- This feature is only supported on Windows based Zultys Advanced Communicator.
- **Please note that the ZAC bit version(32/64) MUST match the Outlook bit version for this feature to operate properly.**

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8 Command line parameters

8.1 Description

ZAC supports a number of command line parameters.

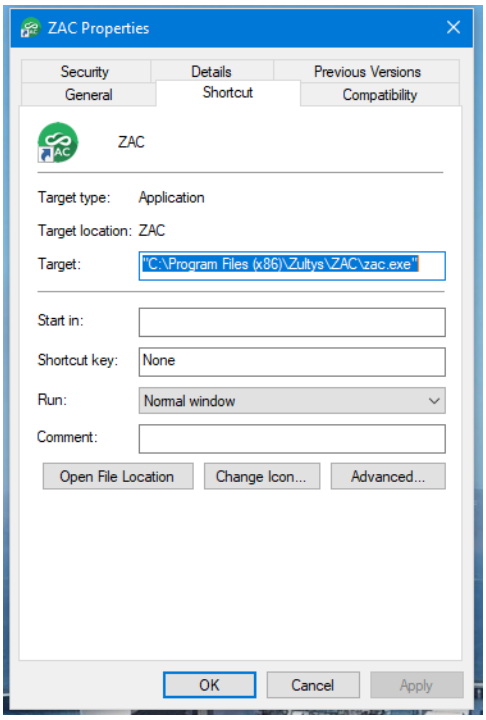
Upon installation of ZAC a default shortcut is automatically placed on the Windows Desktop, as well as in the 'Start Menu | Zultys folder. The simplest way to apply command line parameters is to create a copy of the default ZAC Shortcut and edit the target properties.

8.1.1 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:

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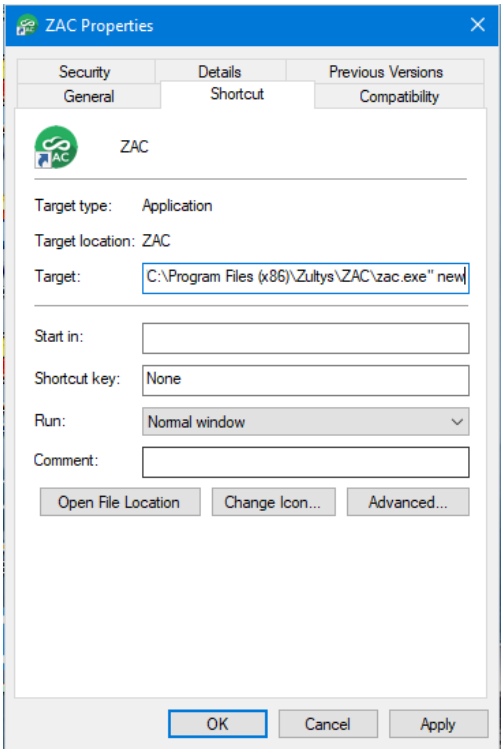
"C:\Program Files\Zultys\ZAC\Bin\zac.exe" new

Will start a new instance of ZAC



8.1.2 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.

8.1.3 Available parameters:

Function	Syntax	Example
Login Screen Parameters		
Login Name	n=[User Name]	n=john.doe - Login as the user "john.doe".

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Function	Syntax	Example
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

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Function	Syntax	Example
		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

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