

# ZAC User Guide

## Install

To install ZAC, open an internet browser and enter the system's IP address provided by IDeACOM ECSI in the search bar at the top of the browser. Click on the ZAC icon under the applications for Users column (Figure 1.1)

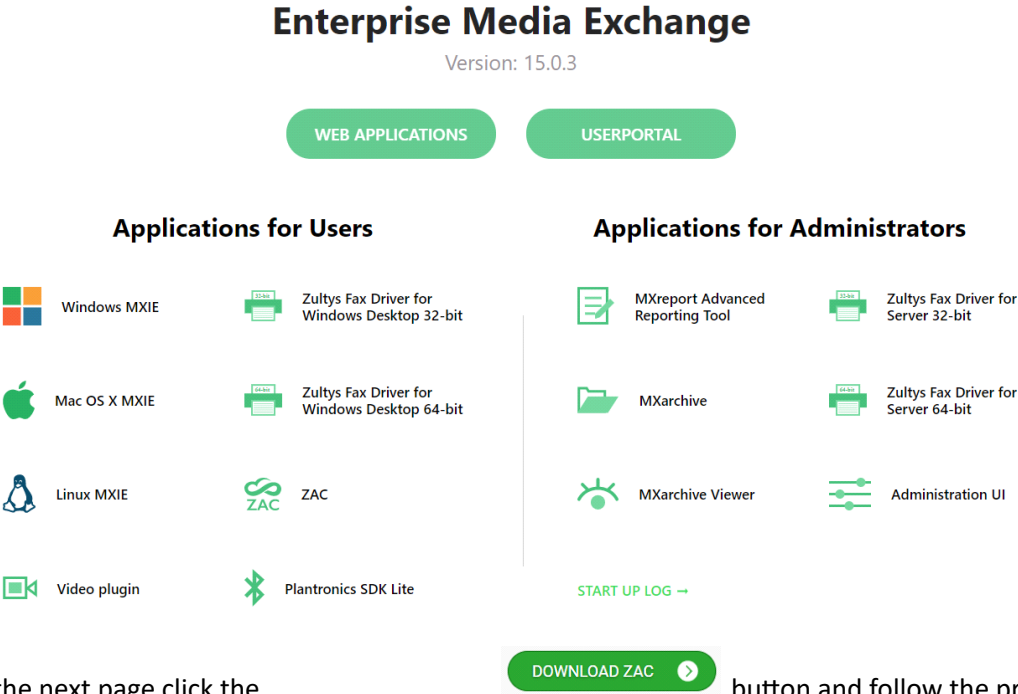


Figure 1.1

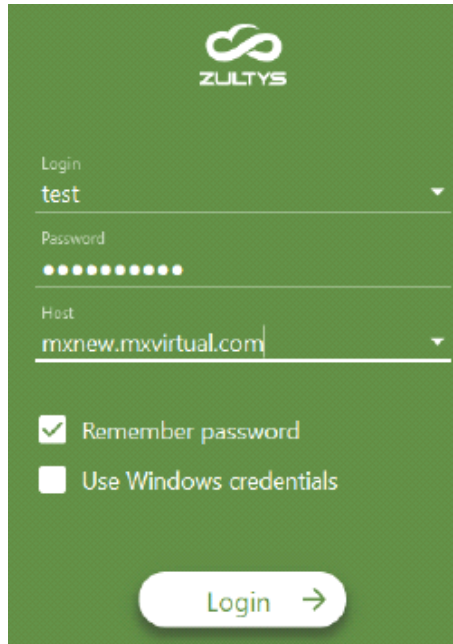
On the next page click the download and install the application.

button and follow the prompts to

**Note for MAC Users:** after downloading the ZAC Application drag the application into the computer's Applications folders to launch it from this point.

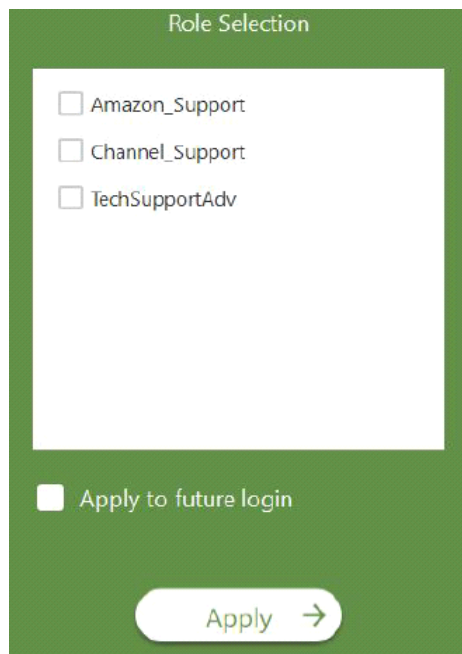
### **Login**

- To log into ZAC, launch the application.
- Each user will have a unique username provided by IDeACOM ECSI.
- The default password is 159753 (Please change passwords to a secure 6 + digit password after logging in).
- The host/URL is the same URL used to download the application.
- Windows credentials can be used as well to log into the application by checking the relevant box.
- Users who are part of one or more call groups will be prompted to login to their respective groups.



The login screen features the ZULTYS logo at the top. Below it are three input fields: 'Login' with the value 'test', 'Password' with masked characters, and 'Host' with the value 'mxnew.mxvirtual.com'. There are two checkboxes: 'Remember password' (checked) and 'Use Windows credentials' (unchecked). A 'Login' button with a right-pointing arrow is at the bottom.

Figure 1.2




The Role Selection screen has a title 'Role Selection'. It contains a list of three roles with unchecked checkboxes: 'Amazon\_Support', 'Channel\_Support', and 'TechSupportAdv'. Below the list is a checkbox for 'Apply to future login' which is also unchecked. An 'Apply' button with a right-pointing arrow is at the bottom.

Figure 1.3

These settings can be saved for future logins.

## Application Overview

The default screen for the application is the buddies screen. On the left side of the application is the various tabs and navigation for the application.

The  button toggles between a compact and expanded mode. Expanded mode provides more space to work with but most actions can be done in either mode.

**Recents** is call and message history for each user.

**Buddies** is a customizable speed dial for each user.

**Dial** is the dial pad where number can be entered.


**Groups** contains all internal message groups the user has created or is a part of.


**Voicemail** contains all voicemails and recorded calls for the individual user.

**Contacts** contain different address books that can be sorted and searched.

**Fax** allows users that have a fax line connected to the system to send, receive and view their faxes.

**Conference** allows conference call times to be set for those with the conference bridge feature **Park** lists all calls placed on a universal hold system all users can access.

**Agent Roles** allow users who are part of call groups see and manage their agent role settings. Some settings are also accessed using the  Button at the top right of the screen

The  settings button accesses general settings, information, and logout options

**Presence:** The user's name and a status that can be shared with others is at the top center of the screen.

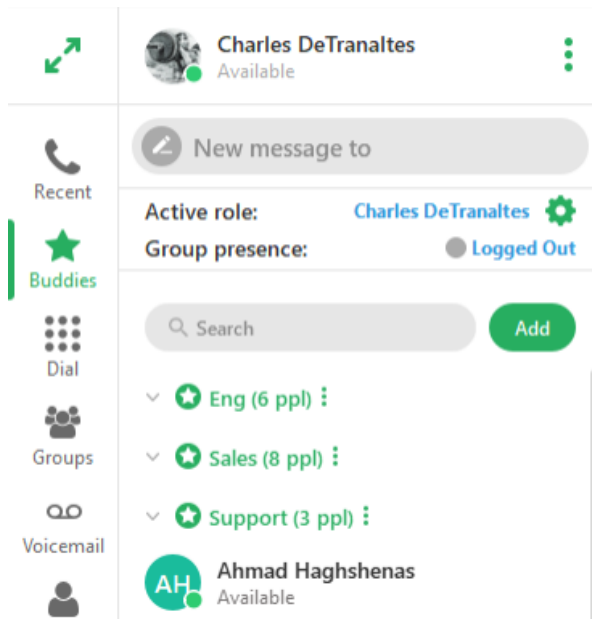


Figure 1.4

**Bind:** Binding is the process of connecting a phone or headset required to use the ZAC program.

**Bind Recent:** This will list devices connected to the specific user, not those connected system wide.

**Bind by Device ID:** If set up by the technician or IT department the MAC address (identifying product number) can be set up to bind with this identifying number


**Bind an external Phone:** A device such as a cell phone can be connected as the device used with the ZAC program. **Note: If using the mobile app, do not bind the same cell phone device to the ZAC program as this will cause problems with calls connecting and routing properly.**

**Bind by call from device:** Using a device programmed to work on the system (a desk phone) a prompt will be given to make a call using the desired device to connect in order to connect the device.

**Bind Softphone:** is used when a headset, without a desk phone is used as the user's phone.

## Making and Receiving Calls

### Making calls

To make a call to someone who is not a contact, click on the dial pad and type the recipient's number and press the  call button to initiate the call. Calls can also be used from the contacts or Buddy sections by clicking on the corresponding green call icon.

### Receiving Calls

Calls can be answered by picking up the physical phone, or by using the ZAC application. Incoming call notifications will appear in a pop up window with call handling options, see figures 2.1 and 2.2.

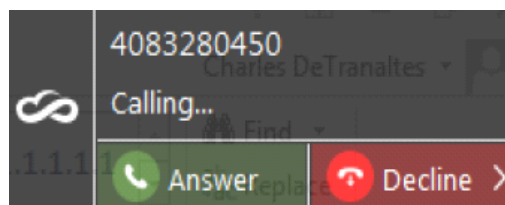


Figure 2.1

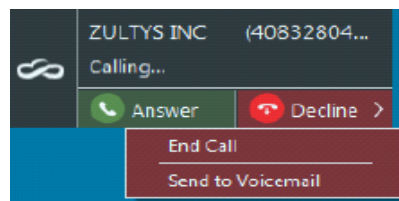


Figure 2.2

The caller ID is displayed on the top of the call window. To answer the call, tap the answer button.

To reject the call, click the drop-down arrow and click End Call to disconnect the call.

To send a caller to voicemail without first answering the call click the drop-down arrow in the decline column and click Send to Voicemail. The caller will be sent to the voicemail assigned to the user's phone.

Depending on the version of ZAC being used decline will silence the ringer and the caller will be sent to voicemail. In this version the end call and send to voicemail options will not be available.

## Managing Phone Calls

Call handling features for active calls will be available via the Dial Pad. Depending on whether the application is in minimized or maximized mode the placement of call handling features will be slightly different, (See figures 2.4 and 2.5).

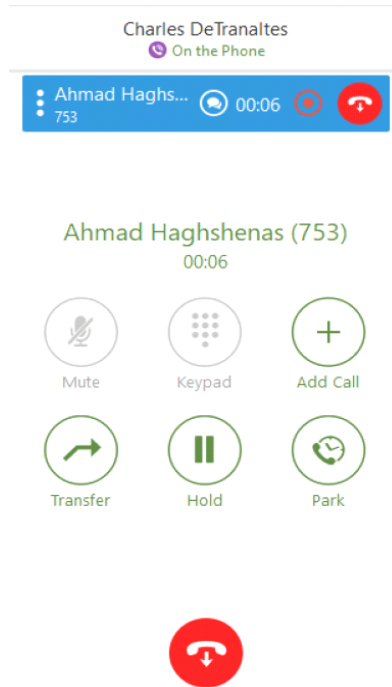


Figure 2.5

### Minimized

In Minimized Mode Conference, internal messaging, record and end call will be options on the blue banner. Mute, Keypad, add call, transfer, hold and park will be displayed below the blue bar. (Figure 2.5)

### Maximized

In Maximized Mode all features will be available in the blue banners. (Blue banners indicate an active call. Grey banners indicate callers who are on hold, See Figure 2.6). The same features are available in each mode and which one to used is simply up to user preference.

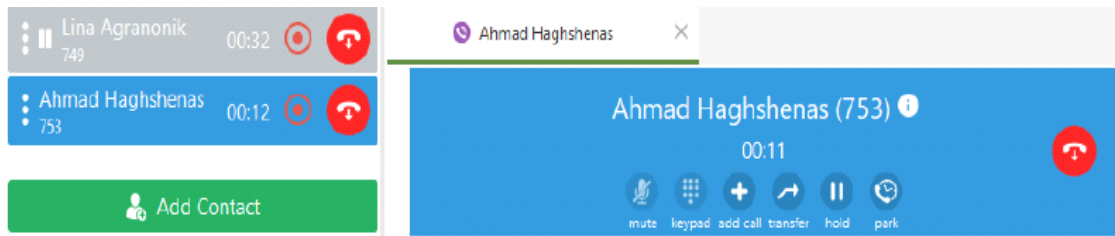




Figure 2.6

In Maximized Mode part of the call options (record  and conference  will appear over a contact or buddy list. In Minimized Mode only one tab can be displayed on the screen at one time. The record icon will only be available if the system is using call recording licenses.

### Parking calls

Parking a call puts a caller in a numbered park zone where any user on the system can pick the call up. If a caller is placed on hold only the user who put the caller on hold can take the caller off of hold.

To place an active caller on park, press the park icon.

Navigate to the park tab to see the park zone the caller has been placed in.

Call and inform the intended recipient which park zone the caller is in (See Figure 2.7).

### Picking up a parked Call

Hover the cursor over the desired caller and a green pickup button will appear. Click on the green pick-up button to pick up the call (See Figure 2.7) If there is more than one caller on park each party will be listed with their corresponding information in the park tab.

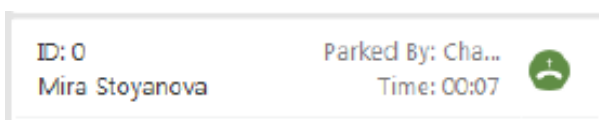
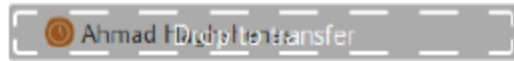


Figure 2.7

### Transferring Calls

## Blind Transfer

When on an active call click and hold on the blue call banner and drag it over the Contacts or Buddies tab until it opens. Hover over the desired contact until a grey outline



covers the user. Let go of the mouse button and the call will be transferred.

To transfer using the dial pad, press transfer and enter the extension or phone number (calls can be transferred offsite) of the desired recipient then click the transfer button again to complete the transfer.

## Attended Transfer

Attended transfers allow the intended recipient to be contacted before the caller is transferred to them.

Press hold to put the caller on hold. Call the intended recipient. If the recipient will take the call drag the grey bar of the caller on hold over the active caller's blue call banner and let go to transfer the call. (see Figure 2.6)

## Transfer to voicemail


If a recipient does not want to receive the call but would like the caller to be transferred to their voicemail, press the transfer button and type \*86 and the extension or phone number of the desired recipient and press the transfer button again. The recipient's phone will not ring and their caller will go straight to their voicemail.

## Transferring from desk phone to Mobile app

Calls can be transferred from the desk phone or ZAC to the user's Zultys Mobile app so conversations can continue on the go. Complete a blind transfer using the user's extension number and answer the call on the mobile app (transfer-100-transfer to move the call from ZAC on ext 100 to the mobile app at ext 100).

*Note: As calls on the mobile app use wi-fi, mobile data or cell carrier data make sure the settings you will be using for the duration of the call are turned on when taking the call. (If you start a call on wi-fi and will need to change to mobile data when leaving the building turn off wi-fi and answer the call on mobile data as the call will drop if the wi-fi connection is lost when leaving the building. Calls will only use one communication method and cannot switch automatically mid-call).*


## Ad Hoc (impromptu Conference Calls)

While on an active call click the  button on the side of the call banner and select conference to start a conference. The active call banner will then say MX conference.

Click add call and get the third party on the phone.

Drag and drop the third party onto the conference banner and all parties will be connected.



Click  on the conference banner for more options. Individual callers can be muted or disconnected from the call without ending the conference call. (see Figure 2.7). If the user who started the call presses the red call button by their name the whole conference will be ended.

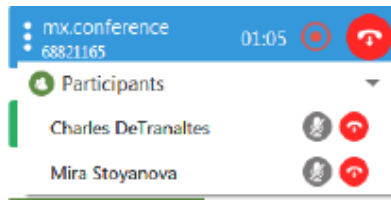


Figure 2.7

## Paging

Type \*4 and the page zone (usually 01) and press send. After hearing a tone make the paging announcement. All phones will play the announcement over their speaker phone.

## Additional Features

### Recents

This tab is call and message history for each individual user. Recents is split into All activity, Calls, and Messages for easy sorting.

Phones with an arrow pointing out indicate outgoing calls.

Phones with an arrow pointing in, indicates an incoming call.

Phone with an x indicates a missed call.

The voicemail sign indicates a missed call that went to voicemail.

A fax icon indicates fax traffic and it will indicate on the fax whether it was incoming or outgoing.

The paper airplane indicates internal messages (See figure 3.1)

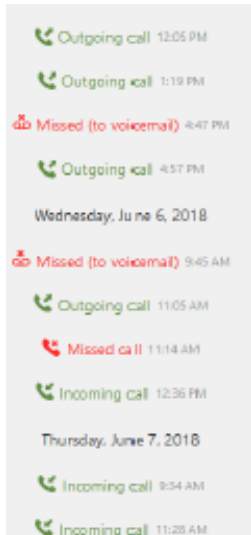




Figure 3.1

## Contacts

The contacts tab is made up of three different groups: MX is all users on the phone system, Local is the users personalized contact directory, imported contacts are contacts that can be imported from an exchange account if desired.

Click the  new contact button and fill out the fields to add a new contact to a directory.

Hover over a contact for additional options

The star when solidly filled in  will place this contact on the buddies list, which works like a favorite's list. To remove a Buddy click on the star and it will be displayed as an outline. This contact will no longer be on the Buddies list.

Press the paper airplane button to send an internal message to another user. The internal message system is set up like the text screen on most cellular phones with the input field on the bottom and the history listed above.

Press the  button to call the contact.

Right click on the contact to see more information about the contact.

## Buddies

The Buddies tab is a Favorites list each user can customize. Like the contacts tab, calls and internal messages can be sent by selecting a user from this tab using the same methods used in the contacts tab.

## Presence

At the top of each tab the user's name and presence are indicated. Click on the green circle beneath the user name and select a status that will display on the screens of all other ZAC and Mobile App users.

A note may be typed to further specify a user's status. To save a note press enter. See figure 3.2

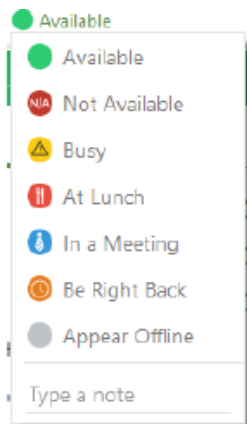



Figure 3.2

## Groups

The groups tab is used to create Private or public groups to send instant messages to, similar to text groups on a cell phone.

Click the  button to create a new group and select public or private. Anyone on the phone system can join a public group but when a group is made private, only the creator of the group can add or remove members from this group.

Instant messaging can only be sent to other users on the phone system.

## Conference

The conference tab is used to schedule conference calls and web conferences if a web conference license has been purchased.

Click schedule and fill out the information provided in the prompts such as time and date and press save. This information can be emailed to participants to let them know of the time of the conference call.

Press the play button to start the conference call. A maximum of three participants can be on a conference call at one time.

## Voicemail

voicemail can be accessed for both group and personal mail boxes for any users who are part of a call group.

Click on a voicemail to listen to it and the voicemail control will appear. (see figure 3.3)

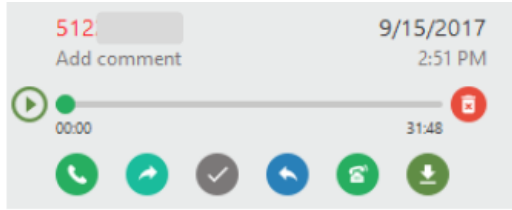


Figure 3.3

Press the play button to play messages

Press the red delete button to send a message to the deleted folder. Only messages delete from the deleted folder will be completely removed from the system.

Press the Call button to call the message's sender.

Press the Forward button to forward the message to another user on the phone system. A note or preamble can be written or recorded to accompany the message. Select the lock symbol to mark the message as private or the exclamation mark button to mark the message important. These same options are available when replying to message.

press the check mark to mark the message as read or unread.

Press reply to record a message and send it straight to the user's voicemail. A message may be typed or recorded to go along with the voicemail message.

Play via bound phone will allow the user to listen to messages on their phone instead of the computer's default sound settings. This will be useful when messages contain confidential information that should not be played over the computer's speakers or the speaker phone.

Press the download button to download and save and audio file of the message to the computer or network.

## Voicemail Settings

Click the  icon to open the voicemail settings.

select a greeting and press play to listen to the recorded greeting.

Press the record button on the selected greeting to record a new/replacement greeting.

To save the message press the upload button and save the message.

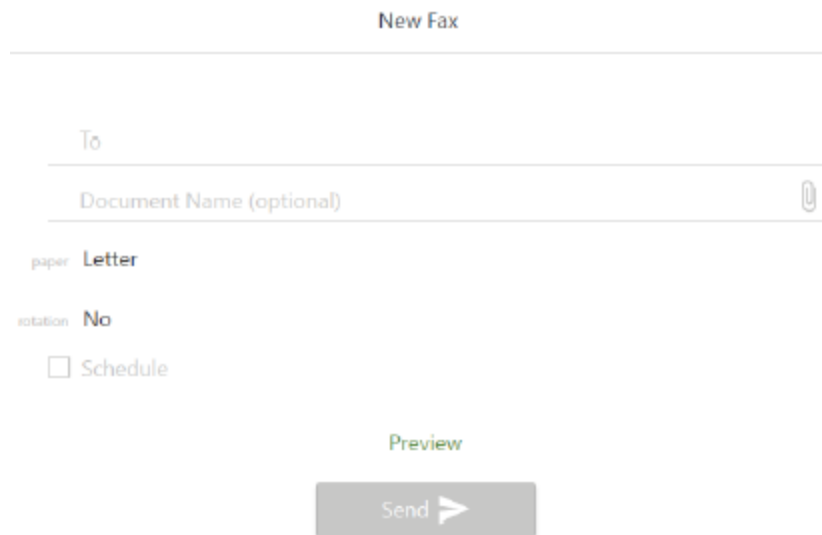
Select the box by the greeting to set it as the active greeting.

**Note:** Auto Attendants are best set up through admin so there is no need to use this section.

## Fax

If a fax line has been set up with the system the fax tab is where most of the controls for faxing will be found. To send a fax, open the selected document to send and press print. Select the Zultys print driver

and press print. The fax tab in ZAC will then be opened prompting the user to fill out information to send the fax (See Figure 3.4).




New Fax

---

To

---

Document Name (optional) 

---

paper **Letter**

rotation **No**

Schedule

[Preview](#)


**Send** 

Figure 3.4

Using the fax driver will allow PDF files to be uploaded as faxes. In the example above a fax has been started without the fax driver in ZAC. This will work as long as the document is an image that is not a PDF.

Enter the recipient's number in the To Field.

Use the fax driver or search for a document to attach.

Select the paper size and orientation

Click send to send the fax or click the Schedule box to schedule a specific time for a fax to be sent.

To view received faxes select from the down arrow by My faxes to select the respective fax location. Faxing has the inbox, Sent and deleted folders like voicemail.

Hover over the message and click, the eye icon to view the message.


Click the more options button, to open the forward, mark as read, delete and save as options.

## Agent Roles

This tab displays the status/availability of users who are part of call groups.

By pressing Not Available in agent roles the user will not receive calls as part of the call group until their status is set back to available. This only applies to the agent role status.

## Screen Sharing

Screen sharing can be used either internally or externally. Screen sharing can be used one on one or in a group. To use screen sharing ZAC must be in expanded mode. 

Start screen sharing with a user or a group by selecting the user or group to open additional options.



Click the green computer button to start screen sharing. The default or primary monitor will be the screen that is shared if the system is using multiple screens. Once the screen share has started each participant will need to accept the screen share invitation which will pop up as a notification in their ZAC program.

Click the stop button to end the screen share.

An outside party can be added to the group chat by clicking on the blue i button for more options.

Click invite to chat by link to create and save a link.

Copy the link into an email and send it to the recipient so they can use the link to be added to the group or individual chat temporarily.

The recipient can click on the link in their inbox and enter their desired screen name to enter the chat.

To create a screen share for only an external party instead of a group, click on your user name at the top of ZAC to access the link to be emailed to the user. Paste the link in an email and send it to the external recipient. Once the screen share has been created it will work the same as if it were set up in a group.

**Any links sent to external users will expire after 24 hours.** If the link needs to be deactivated before the 24-hour time frame the group will need to be deleted and recreated.

## Settings

Press the gear icon in the upper right corner of the Buddies screen to access the application's settings.

**Note:** To save any changes that are made click the apply button at the bottom of the window before navigating away from the settings screen or changes may not be saved.

**About** provides the user basic information about the version of the application they are running as well as a link to the Zultys website where instructional videos can be viewed under the support tab.

**Log out** will log the user out of the application but will not close it.

**Exit** will close the application.

Click settings for the main program settings.

## Application

**General settings** are the main setting that will be adjusted by most users. Setting the program to stay in the system tray (task bar at the bottom of the computer, whether or not the user want's ZAC to always

be the top program on a screen (stay on top) and whether or not the application will launch when the computer is turned on (launch at start up).

**Login settings** allow the user to automatically login to the application and user roles. The user may also change their password as long as they remember their current password.

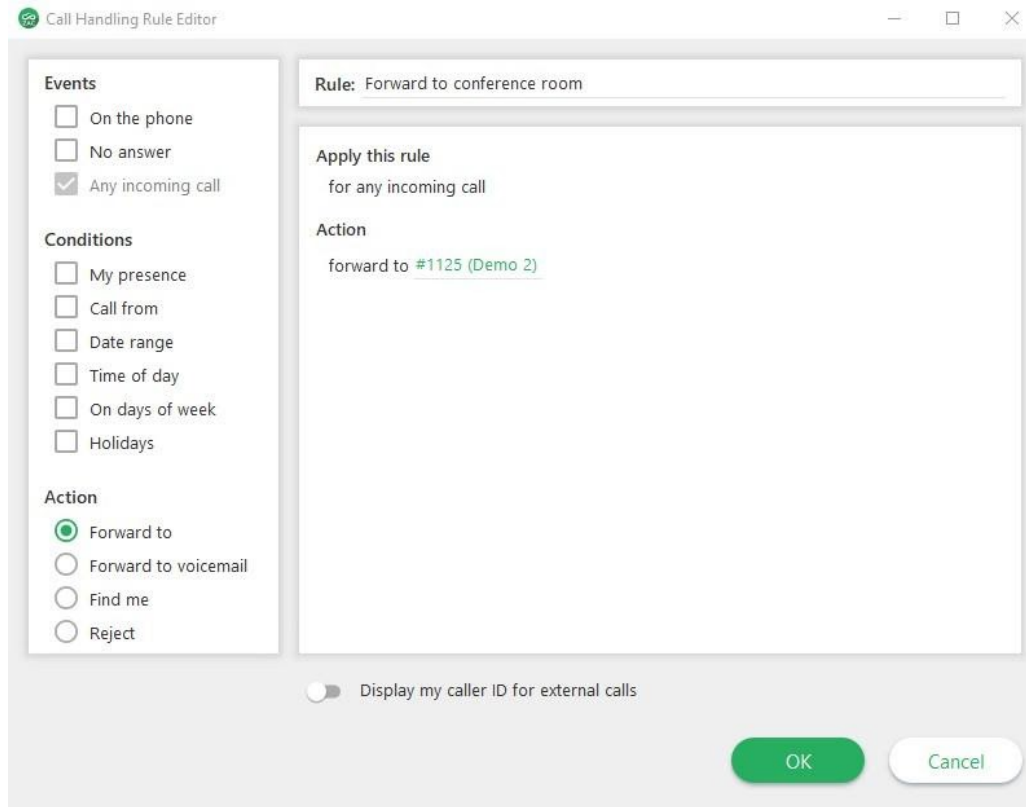
**Integration** will allow the user to connect their Microsoft exchange contacts if the user's email has been programmed into the phone system. This section also allows the user to set up a screen dial short cut so numbers in documents and websites can be highlighted and called instantly without navigating to the ZAC application.

**Audio devices** will allow headset users (primarily softphone users) to set up their headset as the audio for different features instead of the desk phone. Call and message history duration can be set to start deleting this history after a set amount of time.

**Alerts** allow the user to customize which notifications they would like an audio alert for. Pop up Alerts allow the user to change the location and duration of the pop up alerts for incoming calls and instant messages.

## **Call Handling**

Call handling allow the user to set call rules for their specific user. Press the plus button to start creating a new rule. **Events** specify when a rule takes effect, **Conditions** further specify different times or circumstances when this will happen. **Action** will specify the desired outcome of the change being made. One example is setting a rule that all calls to the user's extension will be forwarded to another extension. This can be used when one user will be out of the office for an extended period of time to ensure all of their calls are handled by a representative. (See figure 4.1)



**Figure 4.1**

**Voicemail Notifications,** If the company has set up voicemail to email this will be set up by a technician.

**Softphone** settings are only for users who are using the computer and a headset as their phone without a physical phone. No other users will need to use these settings.