



**ZULTYS**

## Zultys Advanced Communicator Guide

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# Zultys ZAC Guide

## Overview

The purpose of this document is to help walk you through the features and functions of the Zultys Advanced Communicator (ZAC).

We're here to help! If you have any questions about this or any other process please reach out to us at [support@datacommplus.com](mailto:support@datacommplus.com).

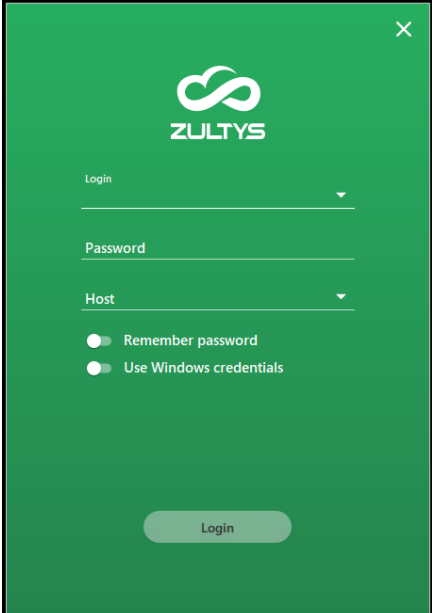
### Downloading ZAC

The first step will be to download ZAC to your desktop. Please follow the steps below:

1. Open a web browser and enter URL :<https://www.zultys.com/zac/>
2. Select 'Download ZAC'
3. Complete the download
4. Once the file has been downloaded double click on the file to execute
5. You will then see a ZAC shortcut on your desktop


### Logging into ZAC

- Open ZAC by selecting the icon on your desktop or start menu
- Fill in the following fields with the credentials provided in your User Details document.
  - Login
  - Password
  - Host
- Select Login



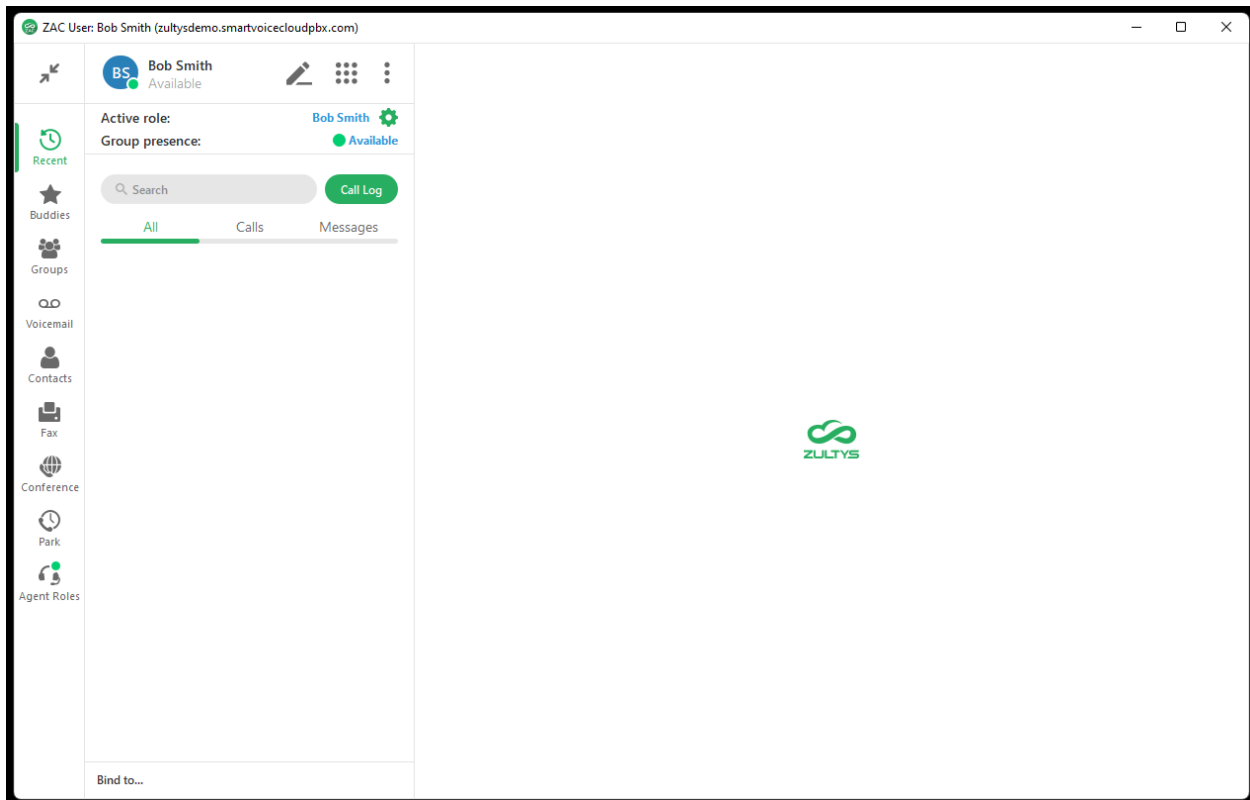
### Setting E911 Location

This is very important that you set the proper E911 Location in the system right away

1. Navigate to the bottom left corner of ZAC and locate: 
2. Click the icon and select the location you currently reside at.

**\*\*MAKE SURE TO CHANGE YOUR LOCATION IF YOU MOVE TO ANOTHER SITE\*\***

### ZAC Control Panel

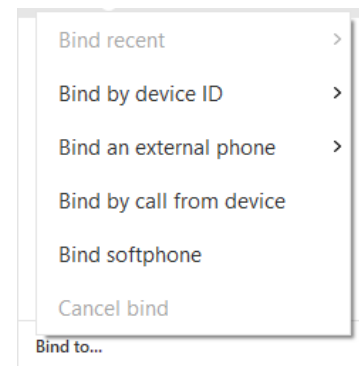


### Binding

Binding is the ability to assign a variety of audio devices that can work with ZAC.

#### Binding a device

1. At the bottom of the control panel you will see a box labeled Bind to..., click on the box
2. A drop down menu will appear. Select the device option you want to bind
  - Bind Recent: Provides a list previously bound devices you may re-bind
  - Bind by Device ID: You may enter the MAC address of the phone to bind
  - Bind to External Phone: You may enter an external phone number to bind
  - Bind by call from device: Provides a number to dial from desk phone to bind
  - Bind Softphone: You will be using a headset for audio (DND included with Softphone bind)  gray is off / red is on

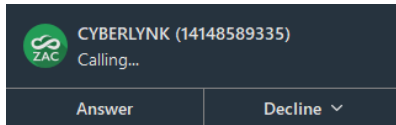


### Answering and Placing a Call

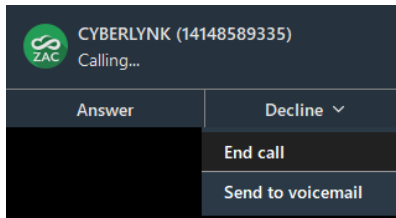
#### Answering a Call

When a call comes in, there will be a pop-up with an Answer and Decline option.

- If your bound device is a softphone click on *Answer*.
- If using a deskphone you have to physically answer the phone.



- If you want to decline the call and are using a softphone you can have it end the call or have it forwarded to voicemail by selecting the *Decline* option.

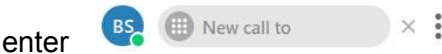


#### Placing a Call

1. Select the group of dots across from your name and click on the dots



2. Dial the external number (including the area code) of the party you wish to call and press enter



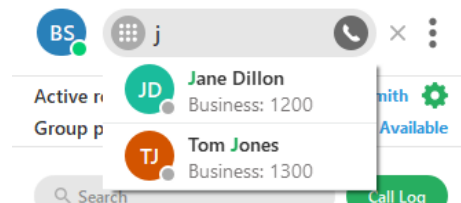
*No prefix is required when placing an outbound call*

#### Placing an Internal Call or Call an Existing Contact

- Select the group of dots across from your name and click on the dots



- Dial the extension you want to reach or type in the name of the contact you wish to call. From the drop down menu select the person you are calling, the number will then be dialed.



### Hold, Transfer and Park

Hold, transfer and park functions will appear once you are on a live call.

#### Placing a Call on Hold

It is best practice to put a call on hold if you are the only user retrieving the call, otherwise follow the steps below for either parking a call or transferring a call.

1. While on a call, press the *Hold* icon
2. The *Hold* icon will change to *Retrieve* and illuminate white while active.
3. To resume the call select the *Retrieve* icon.



#### Transfer a Call

##### Blind Transfer

To transfer a call directly

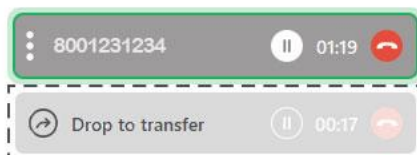
1. When on a call, select the *Transfer* icon
2. On the right hand side of the screen your list of contacts will appear. Search by either extension number or name of the contact you would like to transfer the call to
3. Select the user and the call is transferred.



##### Attended Transfer

To introduce a call before it is transferred.

1. While on a call, press the *Hold* icon
2. Place a call to the user you wish to transfer the initial call to. Let them know who is calling them.
3. If the user agrees to the transfer, drag the first call into the second call by selecting the first call and dragging it into the second call box. The call is then transferred.



4. If the user declines the transfer, hang up the second call and press the *Retrieve* icon to pick up the first call.


### Transferring to a Queue



1. Select *Transfer* first then dial the queue extension number
2. Press the phone icon to complete the transfer.

### Transferring a Call to Voicemail

There are two ways

- While on a call, select *Transfer* followed by \*86 + the extension number and then enter.
- While on a call, select *Transfer* and search for the user. Once you have located the user hover over their name and select the voicemail icon  that will appear.

### Parking a Call

Call Parking is a type of Call Holding. When you park a call, that call can be picked up from ANY phone on the system. If a call is put on hold, you can only pick the call up from that phone.


1. While on a live call, select the *Park* icon
2. The call is now parked and a red dot will appear on the Park icon on the left side of the



3. Communicate that a call has been parked

### Picking up a parked call

To pick up a parked call

1. Select the Park icon on the left hand side of the web client
2. Locate the call within the panel
3. Hover over the call and click on the  icon
4. You are now connected to the caller

### Conferencing



You can schedule a conference for a date, time, if it is recurring or not, and whether to end the call on host leave (if the creator of the conference hangs up, should the entire call be disconnected) through the ZAC control panel once you select the Conference button.



### Schedule a conference call

- Once you have selected the Conference button on the left hand side of the web client, select the Schedule button
- Fill in the following fields
  - Name - Subject of the conference call
  - Date
  - Time
  - Duration
  - Type - Once or ongoing
  - Select if the call should end once the host leaves
- Select Save and Invite
- The new conference will then be saved
- Press the Play button to begin the conference call



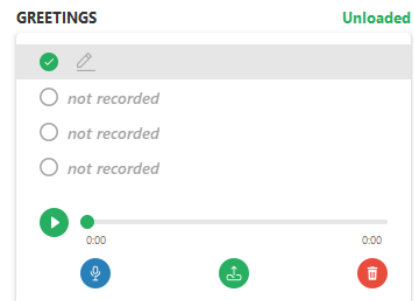
### Voicemail



View personal and group voicemails by selecting from the dropdown menu. You may also forward the voicemail to another user, save it, delete, and mark it as read or unread

### Recording Voicemail Greetings in ZAC

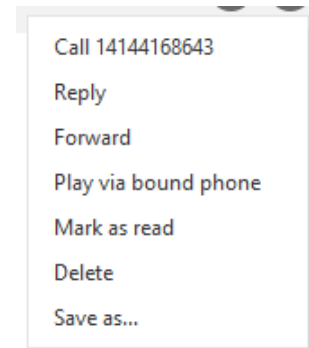
- Navigate to the Voicemail tab on the left toolbar
- Select Greetings button
- In the drop down menu near the top of the pop-up select 'My voicemail greeting'
- You should see the following:
  - Record Name
  - Greetings
  - Auto Attendant Greeting
- Go to the Greetings box
- Select 1 of the 4 greetings to record by selecting the circle of the recording spot you would like to save it in and then the pencil icon to name the recording.
- At the bottom of the Greeting box you will see the following:
  - A blue button with a microphone
  - A green button with an arrow pointing up
  - A red button with a garbage can pictured



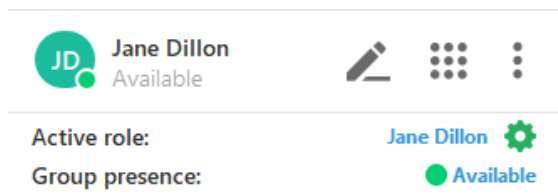
8. Select the blue button with a microphone to record your voicemail.
9. Once done recording your greeting, press the green button with the white square to stop the recording
10. Press 'Apply'
11. Press 'OK'

### Retrieve Voicemail

1. Navigate to the Voicemail tab on the left toolbar
2. Within the Inbox you will have a drop down menu in which you can select your personal voicemail box or group mailboxes that you are able to review.
3. Put your cursor over a voicemail and you will see a play button or select the three dots to see options available
  - Call the number back
  - Reply
  - Forward
  - Play via bound phone
  - Mark as read
  - Delete
  - Save as...



### Presence

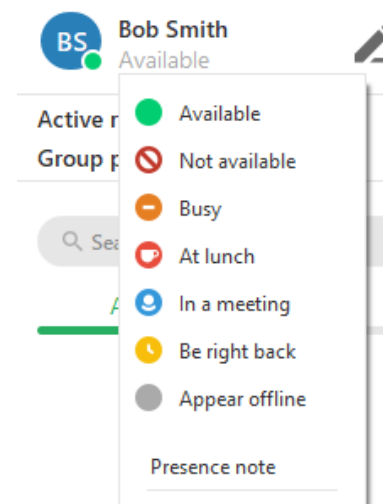


### Extension Presence

ZAC allows for you to change your status. Above you see that Jane Dillon is Available. To change your status:

1. Select the status below your name in the top left corner of your ZAC.
2. Choose from the drop down menu the status you would like to change your extension to.
3. Your status will be then be updated

**\*\*Please note that the statuses as is are for visual purposes and can be customized\*\* via call handling rules**



### Active Roles

Selecting **Active Role** allows you to log in and out of groups.

- Groups labeled with a green circle will allow you to log in and out
- Groups labeled with a gray circle will not allow you to log in and out

### Group Presence

Selecting **Group presence** allows you change your status in a group that you are logged into (Modifying your group presence WILL affect your activity within the group)

- Available: The system will send you calls from the group
- Not Available: The system will bypass you with calls from the group

### Additional Features



#### Recent

Recent

Shows call history and internal user chat history



#### Buddies

Buddies

A list of your favorites.

1. Create a favorites list by navigating to contacts
2. Right click and select Add to Buddies
3. This contact will appear under Buddies



#### Groups

Groups

Create group chat groups

1. Select Groups
2. Select Create Group button
3. Please fill in the following:
  - Name your group
  - Select the radio button next to the contacts you want to add
  - Decide if to make the group public or keep it as private
  - Select the create button



### Contacts

List of users on the system as well as a customizable list of contacts you wish to add.

1. Select the Contact tab
2. Select the three dots next to the Search field and click on Add Contact
3. Fill in the following information
  - o Name
  - o Business Phone
  - o Mobile Phone
  - o Home Phone
  - o Email
  - o Mark the contact if you want it to appear under Buddies
4. Select Save



### Fax

The ability to send and receive faxes if applicable



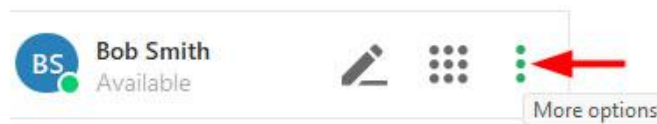
### Agent Roles

View the statuses of the users in each group

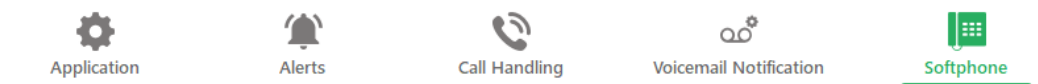
## Internal Settings

You can customize several areas of ZAC through the Settings window.

1. Locate and select the three (3) dots listed vertically located near the top right corner of your ZAC - See image below:



2. Review the toolbar – See image below:



- Application – Basic settings in ZAC
- Alerts – Setting and sound alerts
- Call Handling – Call handling rules
- Voicemail Notification – Voicemail to email setting
- Softphone – Settings when using a softphone device (headset, speakers, etc.)

**\*\*Only necessary settings will be detailed\*\***

### Applications



Application

#### General

- Stay in system Tray – keep ZAC icon in your taskbar on your computer
- Stay on top – Keep ZAC visible on the top of computer
- Launch at system start – Have ZAC start when you turn your computer on

#### Login Settings

- Remember password – Ask ZAC to remember your login password
- Auto login on application start – Login automatically when you select ZAC
- Change Password – Change password

#### Integration

- Microsoft Outlook contacts – Enable when once the integration piece has been downloaded (enables the connection to work)
- Microsoft unified communication – enable once the integration piece has been downloaded (enables the connection to work)

#### Audio Devices

- Sound Notification – Choose a sound notification
- Play voicemails: Choose what device voicemails should play through
- Record voicemails - Choose what device you should record voicemails through

#### Call and Message History

- You may have ZAC delete messages and call history after a specified number of days

#### Automatic Presence Change

Ability to alter your presence status due to inactivity or computer lock up.

### Alerts



Alerts

#### Sound Alerts

- You may choose what new notifications you want to display

#### Popup Alerts

- You may choose how long ZAC should present the notification to you as well as where the popup should generate

### Incoming Call Popup Alert

- Generates the ZAC interface when you press 'Answer'

### Presence Change Alert

- Ability to manage the users whose presence you are monitoring

## Call Handling

### Rules



Ability to create and manage call handling rules for your extension

1. Select the + sign



2. Name the new Rule

Rule: Enter rule name...

3. Select from the different options what you would like to customize
  - a. Events - On the phone, No answer, Any incoming call
  - b. Conditions - define conditions that need to be met
  - c. Action - define what happens to the call if the Events and Conditions have been met
4. The selections will show in the Apply this rule and Action box. Select OK to save.

## Voicemail Notification

### Rules

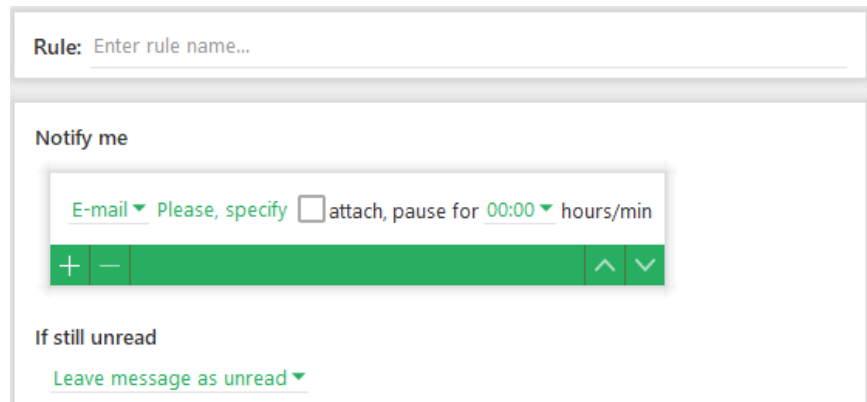


The ability to establish a rule to set up voicemail to email

1. Select the + sign



2. Type in the name of the rule
3. Select Email in the drop down menu
4. Click on Please, Specify and add the email address in the Email Notification window that appears
  - a. Select OK after adding email address
5. Select the box in front of attach
6. Select from the dropdown menu how you would like the message to appear
7. Select OK after you have setup the rule

A screenshot of the web interface for configuring a Voicemail Notification rule. At the top, there is a text input field labeled "Rule: Enter rule name...". Below this, the "Notify me" section contains a dropdown menu currently set to "E-mail", followed by the text "Please, specify" and a checkbox for "attach, pause for 00:00" with a dropdown for "hours/min". Below this is a green bar with a plus sign, a minus sign, and two arrows (up and down). The "If still unread" section has a dropdown menu set to "Leave message as unread".

### Softphone

#### Auto Answer Calls

- Yes or No

#### Audio Devices

- Received Audio - What devices should receive audio
- Ringtone - Which ringtone should play
- Microphone – Which device should be used a microphone

#### Volume Settings

- Adjusting the volume/speaker

#### Call Waiting Tone

- Adjust the volume of the call waiting tone



**If you need further assistance, please reach out to us at [support@datacommplus.com](mailto:support@datacommplus.com). Once we receive your request one of our representatives will get back to you as soon as possible to help you with any of your phone system needs.**