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Technical Publications

ZULTYS

WebZAC User Manual – MX Release 17 Maintenance

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Description
This manual describes the features and operation of WebZAC. WebZAC is a web based Unified Communication client that operates in compatible web browsers, no operating system is required to utilize WebZAC.
This document provides the feature operation including new features added in MX Release 17.0.10.

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Revision History

Date/Revision	Comments
June 2021/P1	Draft Initial document for internal review.
July 2021/P2	Early Access version
October 2021/1	GA release
June 2022/2	Release 17 Maintenance update

Getting Started

1.1 Description

Web based Zultys Advanced Communicator (WebZAC) is a Unified Communications client that provides an easy to use interface to access the capabilities of the MX system. WebZAC runs in a standard web browser and eliminates the requirement of installing application specific software on users' computers.

1.2 Requirements

- **Web Browser** – The following browsers/versions are supported:

Browser	Version	Features supported
Google Chrome	83.0.4103.116	All
Mozilla Firefox	79.0b6	All
Microsoft Edge	83.0.478.61	All
Safari	14.1.1	All

1.3 Other Requirements

- MX software version 16.0.4 minimum 17.0.10 (or higher) recommended for full feature operation (not all features are available in Release 16 or 17.0.6 firmware)
- Security certificate installed on the MX
- ZAC user license for each user
- Ports 443, 7779, 33000-35000 are open and available directly or through NAT configuration.
- Softphone video ports 3000-3063

1.4 What's new in WebZAC 17.0.10 (Maintenance)

- Speed Dial
- Queue monitor supervisor commands
- Change another user's presence

You may jump directly to the new features section here:

8 Release 17 Maintenance Features

NOTE: Not all ZAC features are available in WebZAC. Presence change alert, local address book, Salesforce, Flex Communicator, Outlook Communicator and Fax are not supported.

1.5 Installation

Since WebZAC is a web browser based program, there is no need to install any application software on the client computer. This enables WebZAC to be OS/Hardware agnostic. As long as the client computer/device is running a supported web browser, WebZAC can be utilized on that computer/device. This also assumes the device has some audio and video capabilities if video calling is desired.

2 Operation

2.1 Access

To access WebZAC, enter the following in the URL:

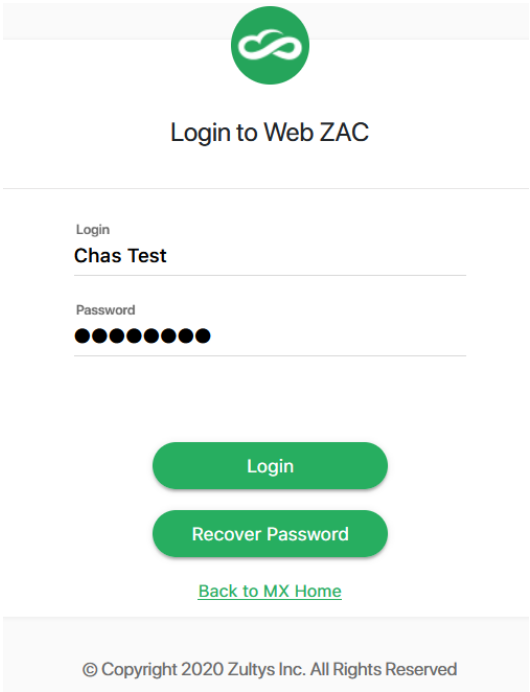
MX domain name or IP address/WebZAC

Example: 10.10.10.100/WebZAC

You may also go to the MX landing page and access WebZAC via the icon on the landing page:

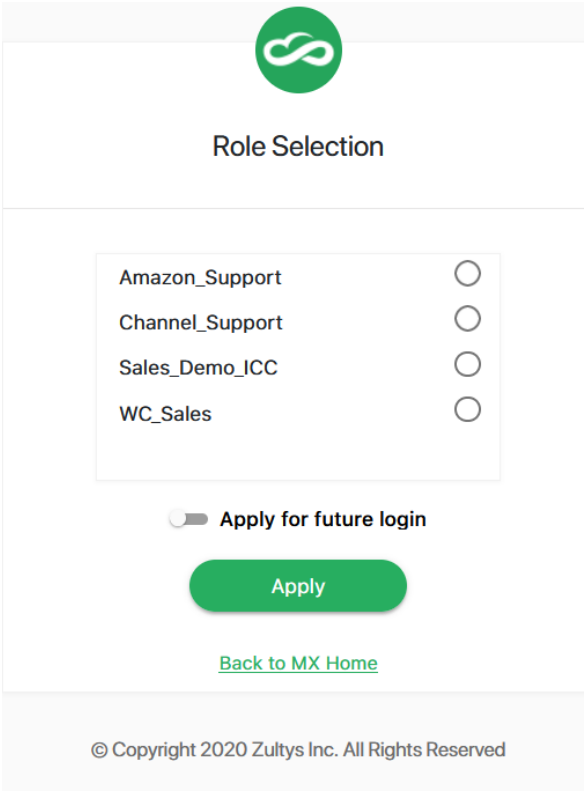
2.2 Login Screen

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.



- Click Login to proceed.
  If you are a member of a call group, you will see a Role selection screen after clicking login.
- Select the desired groups you wish to log into.

You may select “Apply for future login” to have the groups auto selected for you.

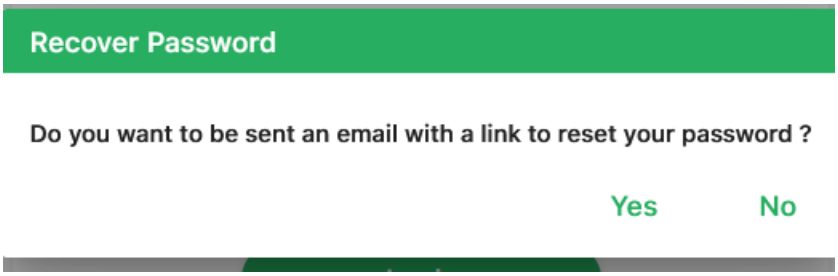


Click Apply

If you are logged into another ZAC session (WebZAC application or other ZAC, you will be asked if you want to logout of the current session.

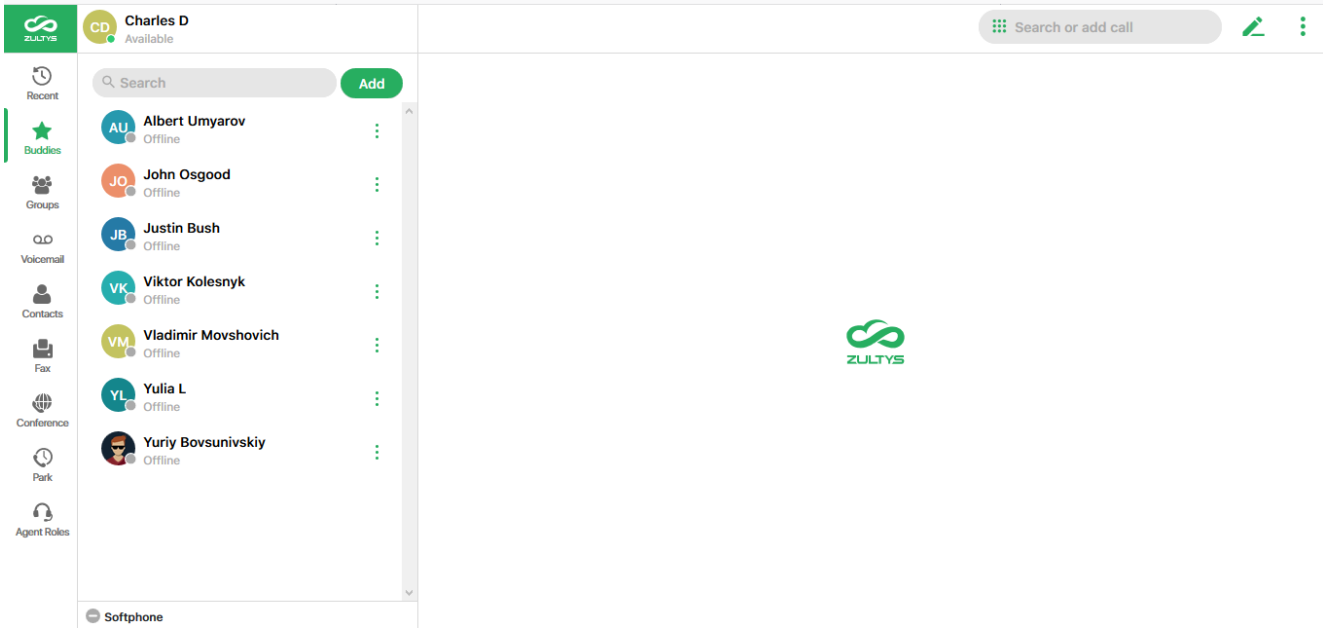
2.2.1 WebZAC 8: Recover Password

This feature allows you to request an e-mail with a password reset link attached. Click on the link to be taken through the process to reset your password.



2.3 Main Screen

Once you have logged in, the main screen will appear.

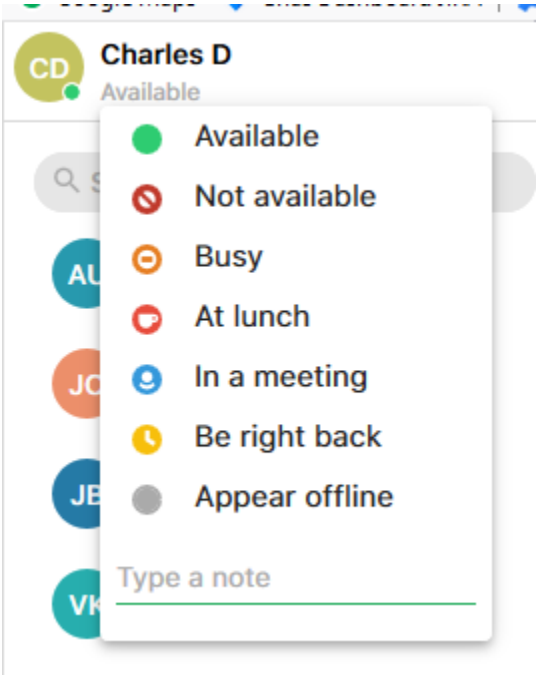


The menu bar is on the left side which provides access to the main functional areas of WebZAC.

The middle area is context sensitive and will display buddies, recents, contacts and call processing information.

The main area is where the context sensitive tabs are presented when in full mode.

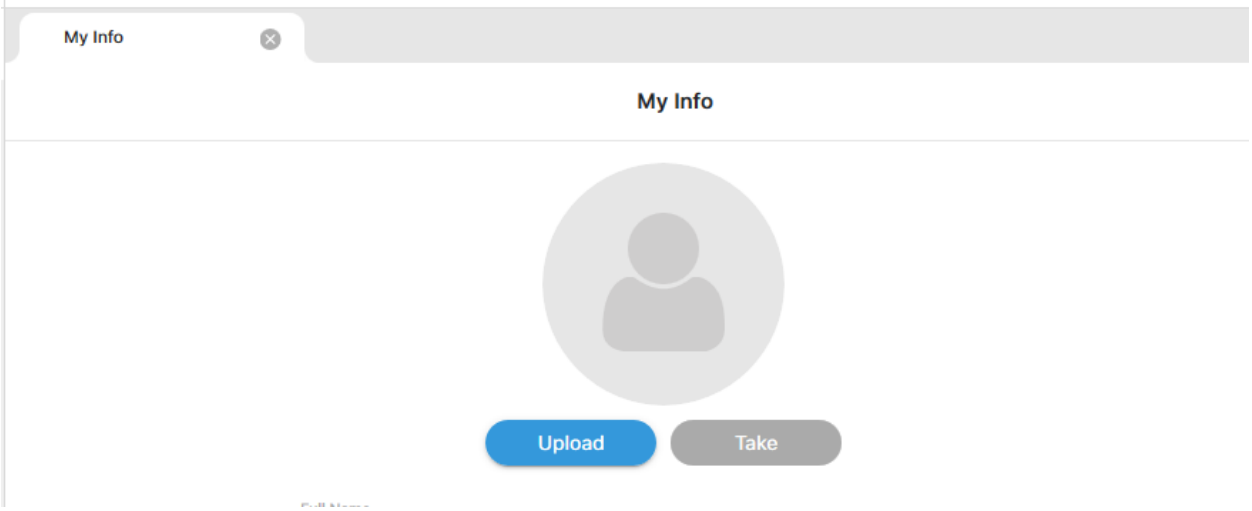
- Presence Indicator/selector



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.

- My Info – User Information/Image
  You may add an image that can be associated to you. You may also add/edit your contact information in this area as well.
  Click your name in the presence indicator bar. The My Info screen will appear.



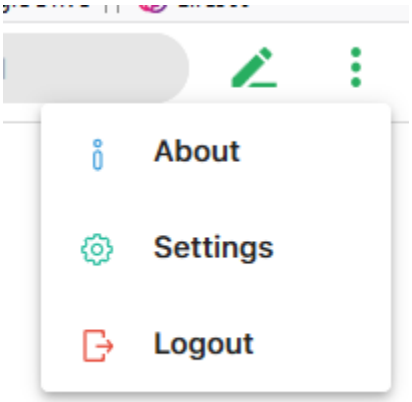
Click the Upload button. The File Explorer window will open. Navigate to the location where your desired image is stored and double click on the image.

You may size the image using the controls to the right of the image.
You may edit your contact information:

- Full name
- Mobile phone
- Home phone
- e-mail

When you are finished, click Save.

- Option Menu

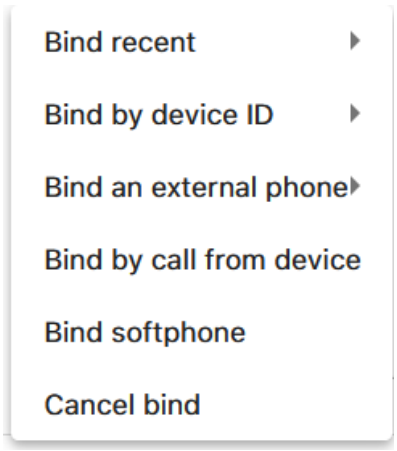


This menu contains the About screen, Setup screen, Log off function, and the Exit function. It is accessed by clicking on the icon in the upper right corner.

- **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.
- **Logout** – This will log you out of the program. You must login again to utilize the program.

WebZAC can initiate voice calls and handle multiple voice calls only through SIP devices or external numbers to which it is bound. WebZAC instances can be bound to only one device at a time. The Bind window is used to bind WebZAC to a SIP device, internal softphone for PC audio usage, or an external phone number.

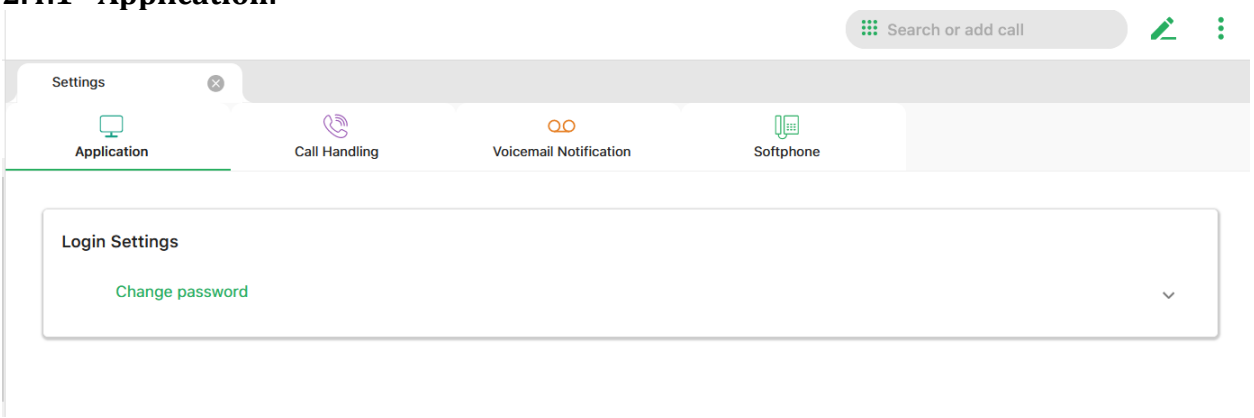
To access the Bind window click the Bind to or current device in the lower left corner of WebZAC. A drop down menu will appear.



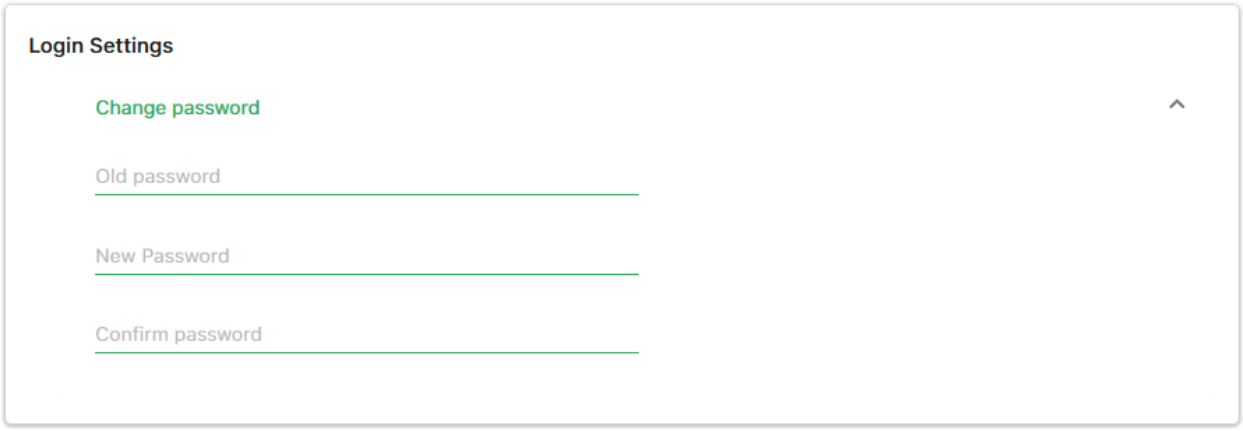
- **Bind Recent**: This option allows you to select from a menu of devices and registered contacts to which your WebZAC was recently bound.
- **Bind Device by ID**: This option binds your WebZAC instance to an MX managed device. When entering the MAC address, make sure you utilize **upper case** for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

2.4 Settings Menu

2.4.1 Application:

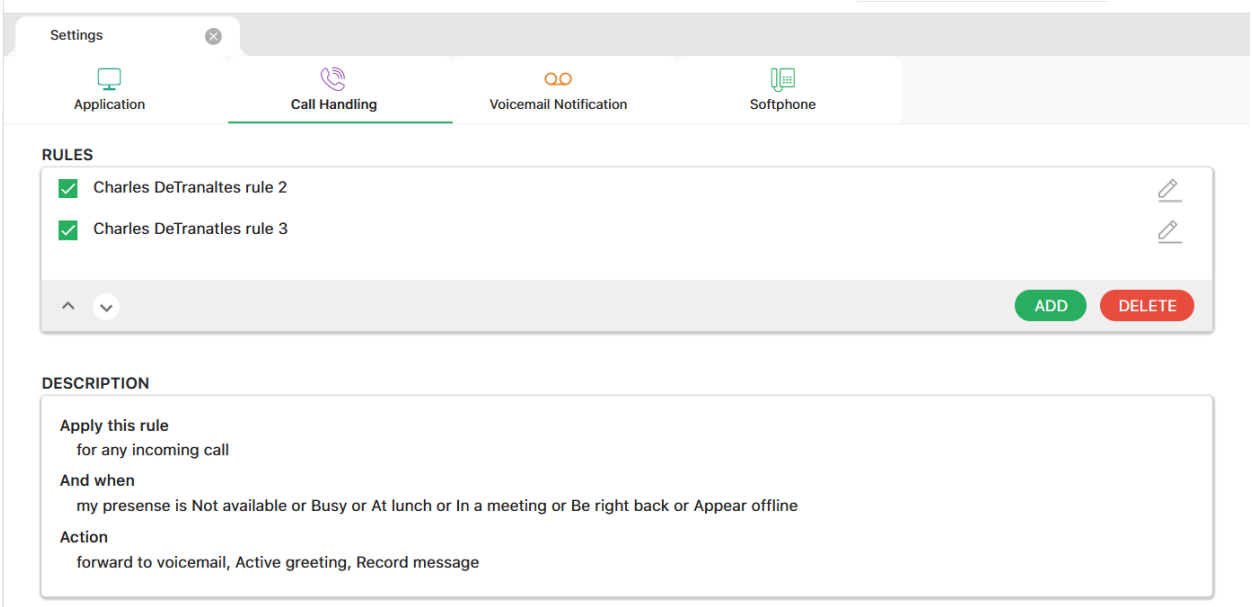


Change password – This allows you to change your user password. Click the icon. You then need to enter your old, new and confirm new passwords.



2.4.2 Call Handling:

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



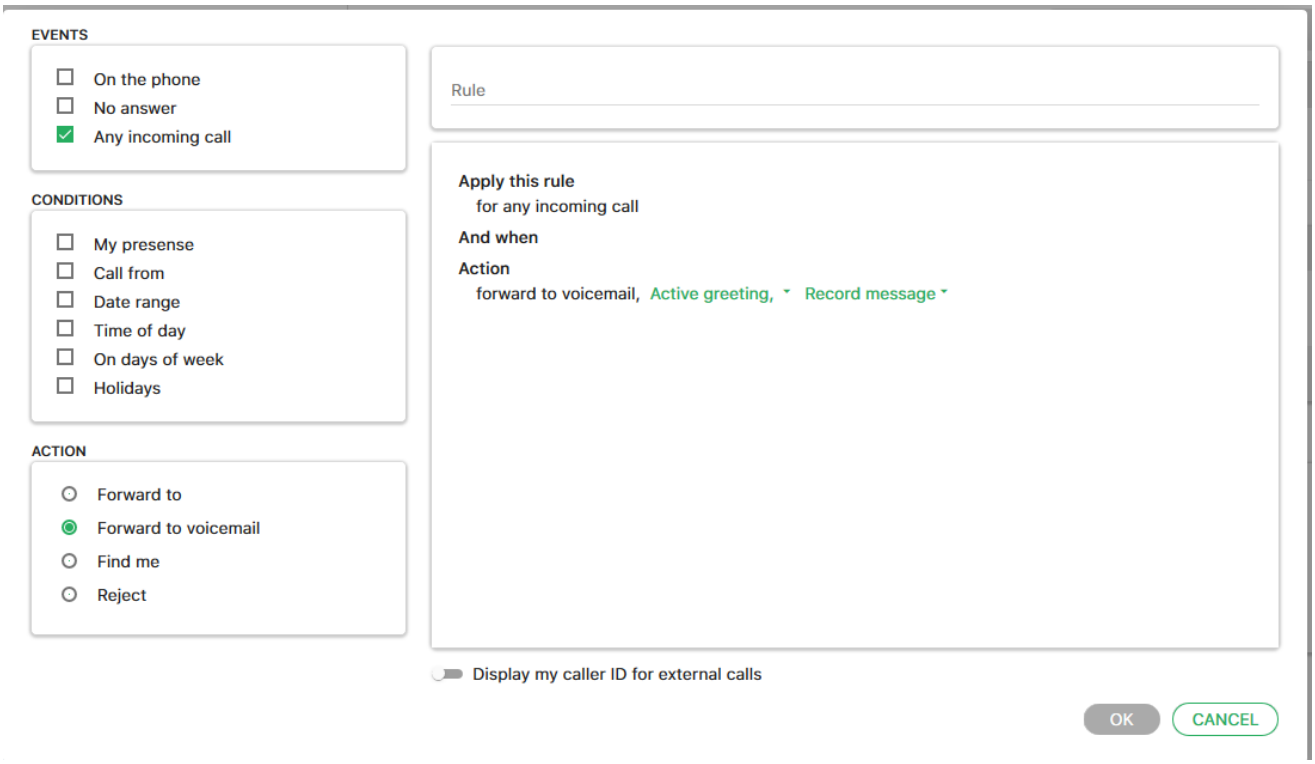
To add a new rule, click the ADD icon at the bottom of the Rules area.

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

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

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

Adding or editing a call handling rule:



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

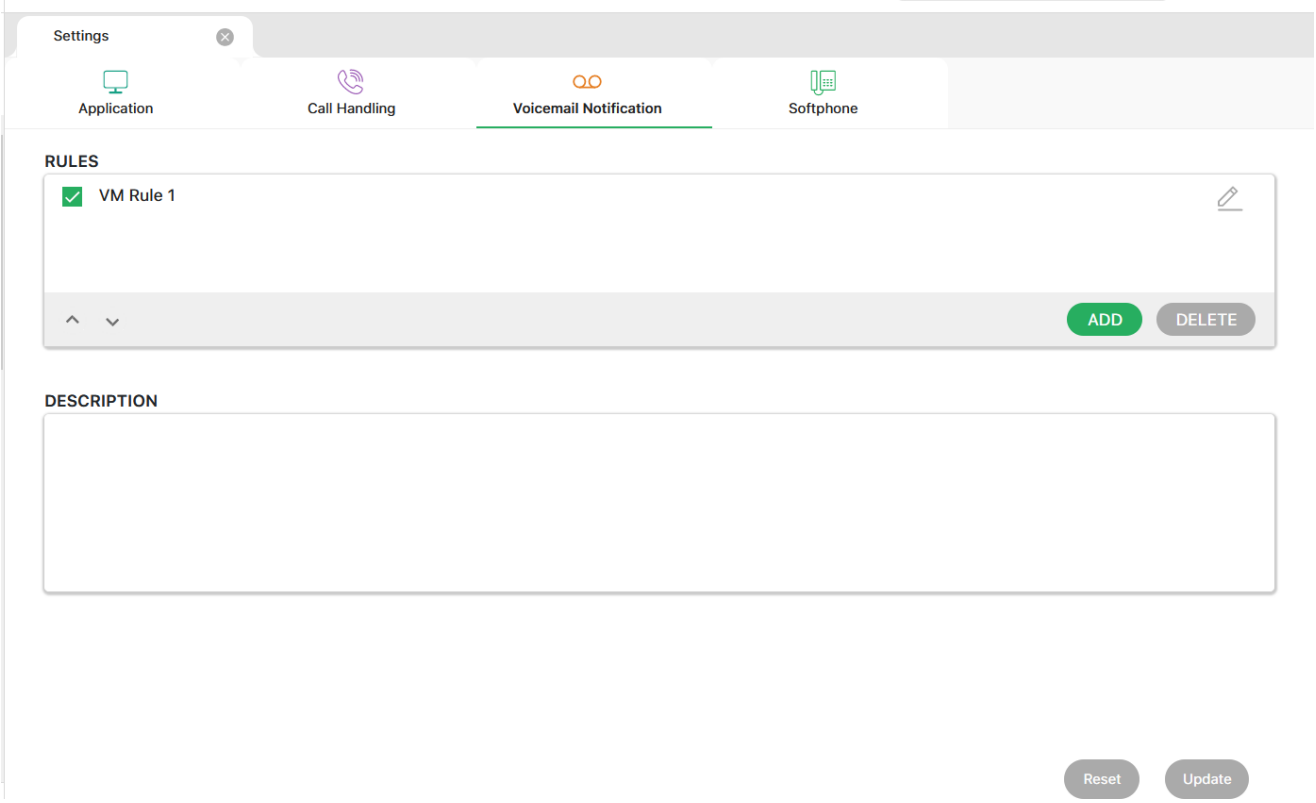
Events – Allows you to select which events can trigger the rule. On the Phone, No answer, or any incoming call.

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.

2.4.3 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.



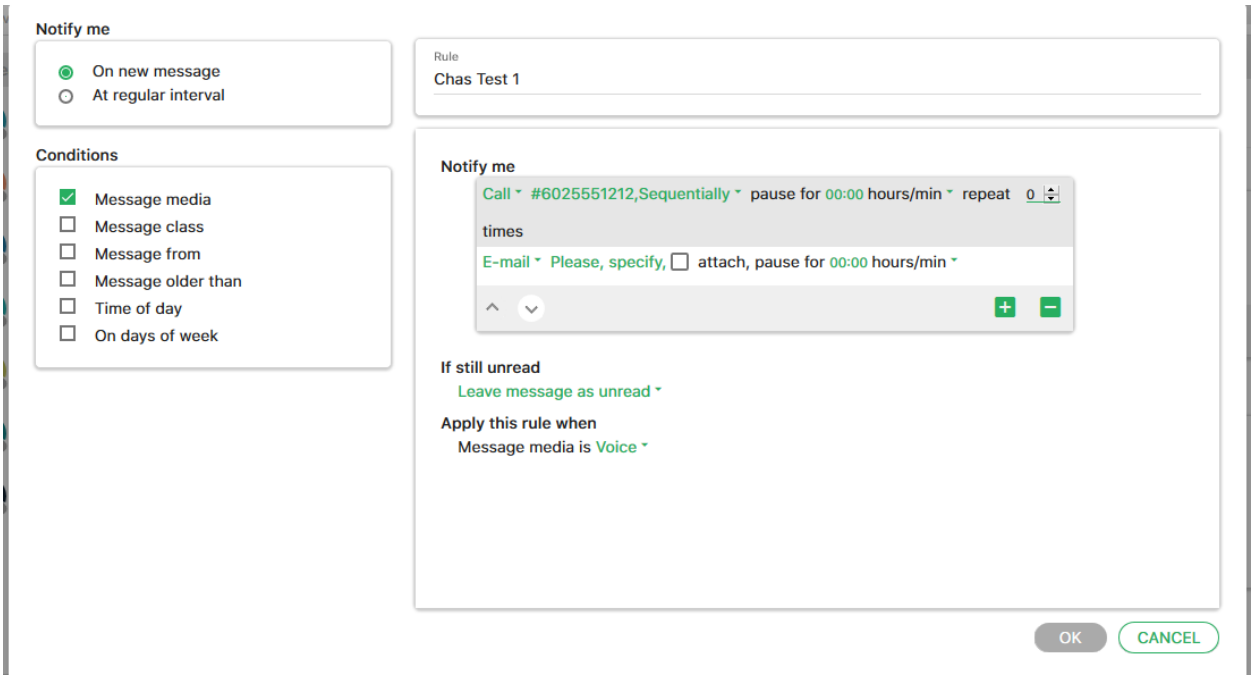
To add a new rule, click the ADD icon at the bottom of the Rules area.

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

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

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

Adding/editing a voicemail notification rule:



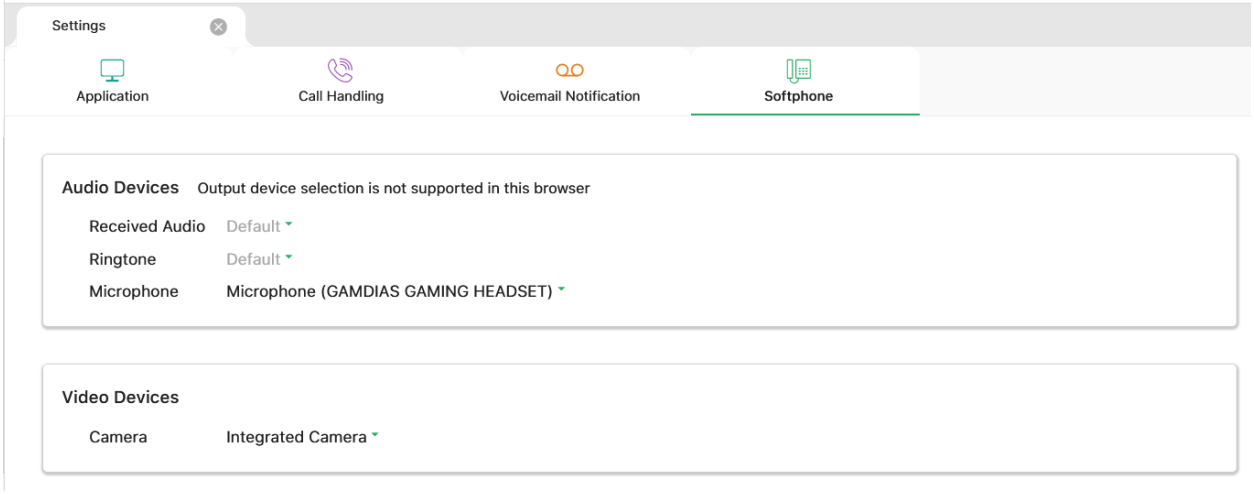
Rule – If adding a new rule, enter the desired name to be associated with the rule.

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

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

2.4.4 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.



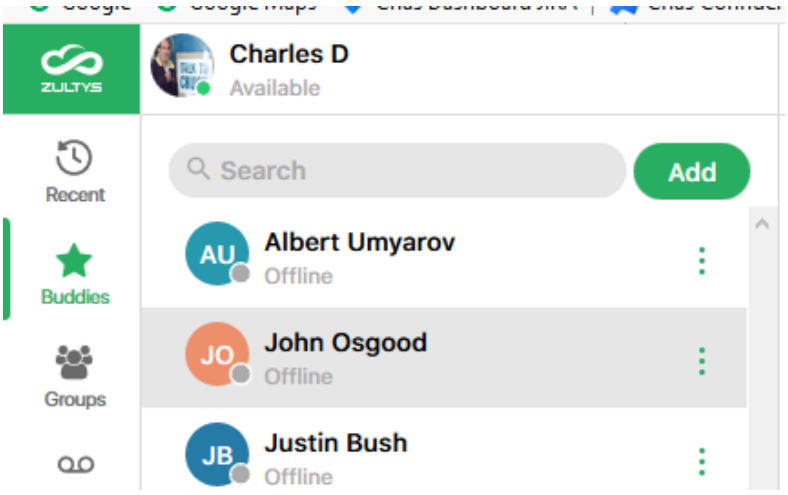
Audio Devices – This area allows the selection of the audio devices the softphone uses for receiving audio, ringtone, and transmit audio.

Video Devices – This area allows the selection of video devices for video calling functions.

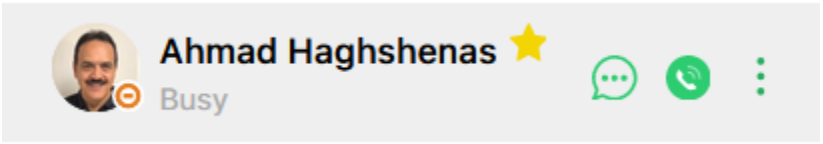
Note: Chrome supports setting all three of the audio devices (Received Audio, Ringtone, Microphone). Firefox and Safari support setting the (Microphone). This may be subject to change per browser.

2.5 Buddies Screen

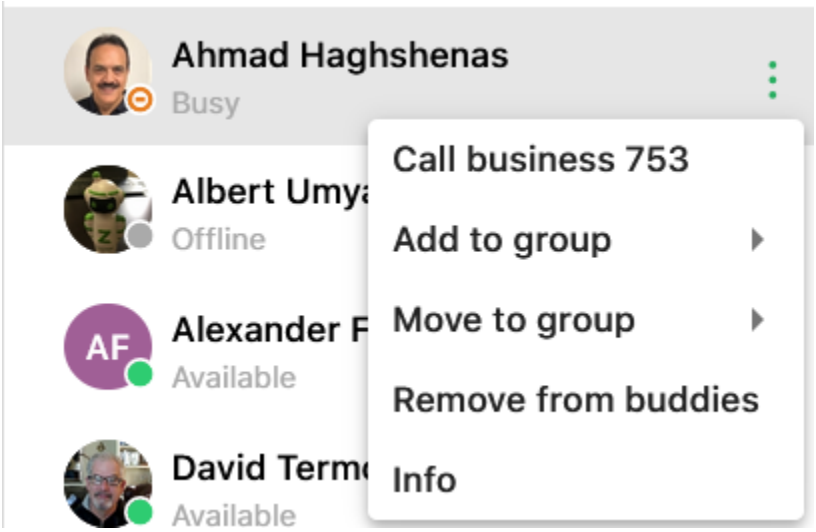
The screen where the contacts you designate as buddies and buddy groups are located.



As you mouse over a buddy the chat and call options will display. the options that are available (some options may not be available based on what contact information the user has entered):



In addition, clicking the ⋮ will display the pop up menu sub actions:

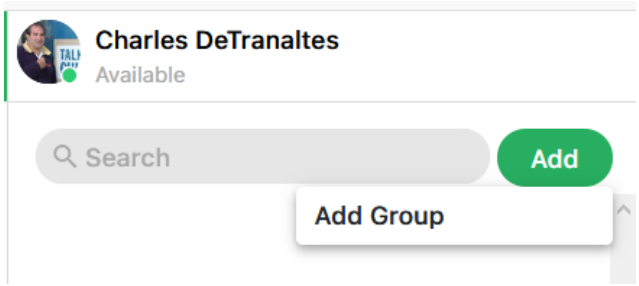


2.5.1 Buddy Groups

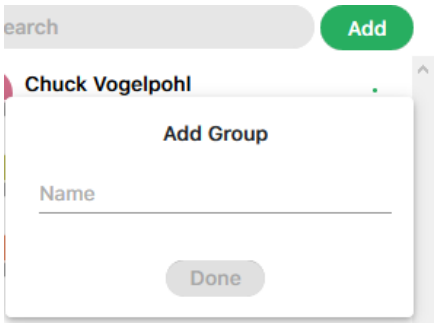
WebZAC allows you to configure your buddies into groups for easy identification. For example, you may group your buddies by department Sales, Operations, Engineering, etc.

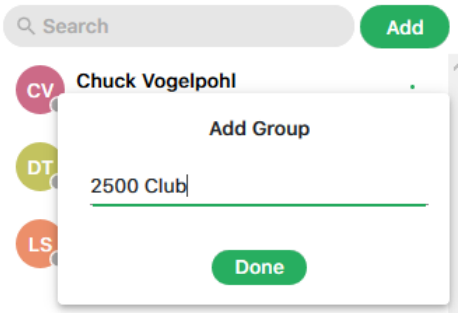
Create a new group:

- Click the Add button in the Buddies screen.



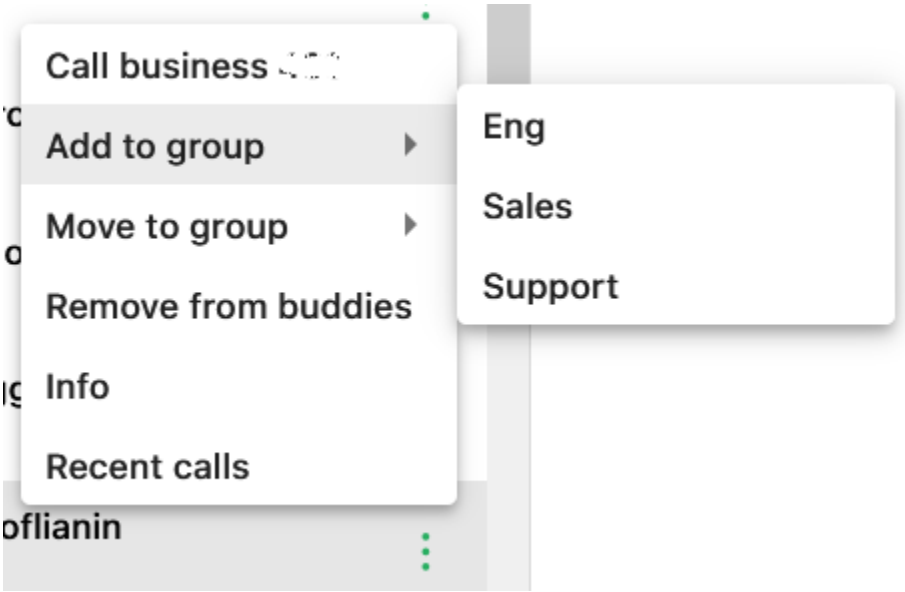
- Click the Add group option.
- Enter the desired name and click Done. The newly created group will appear in your list.





To add buddies to a group:

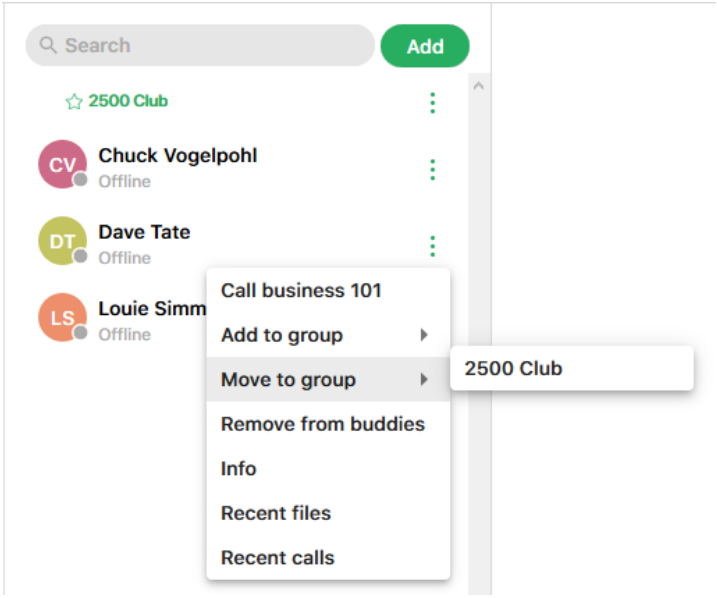
1) Click the ⋮ icon next to the desired buddy to add to the group.



2) Select the desired group to add the buddy to.

Moving buddies to different groups

There is an ability to move buddies from one group to another group.

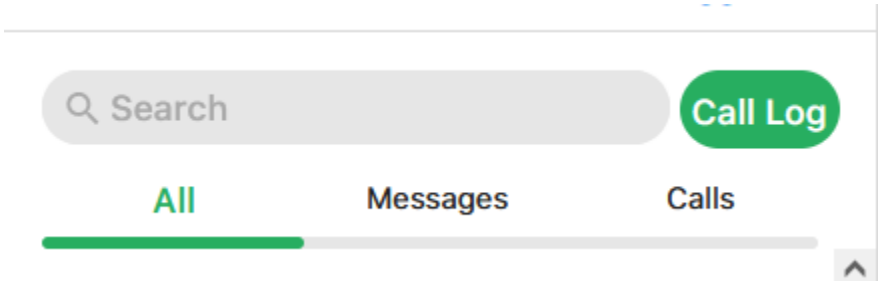


Select Move to group and then click the desired group.

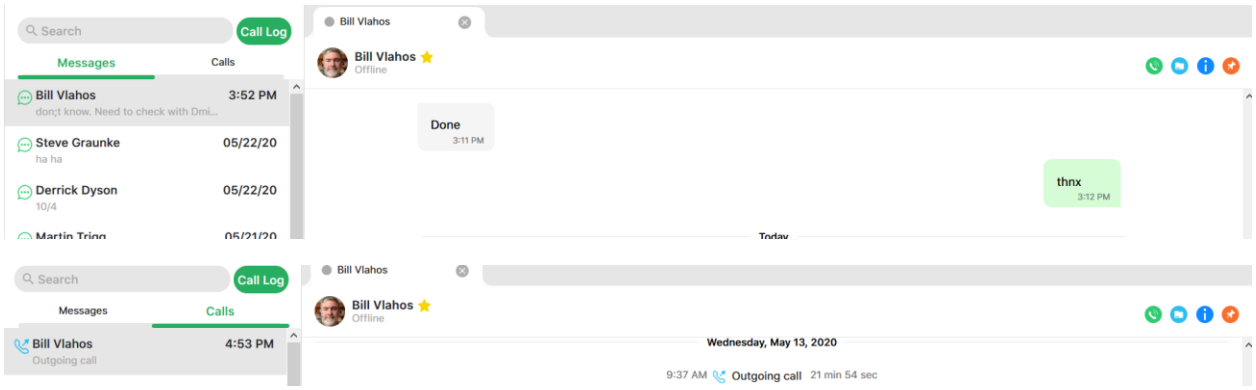
2.6 Recent Activities Screen

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

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



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



2.6.1 Call Log

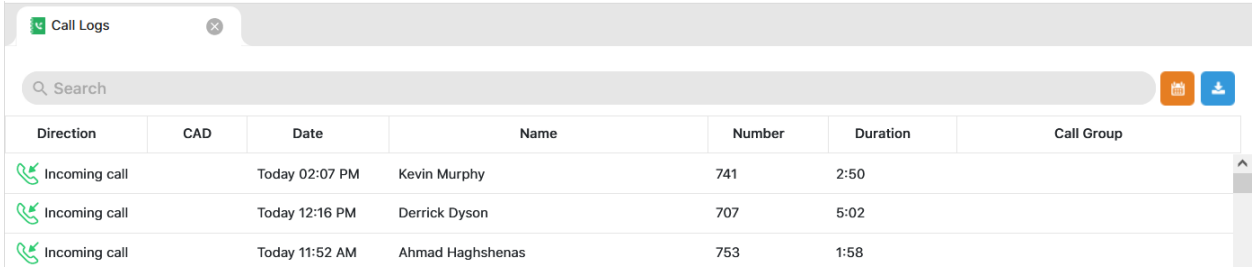
You may access the Call Log from the Recent activity area by clicking on the Call Log button.

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

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

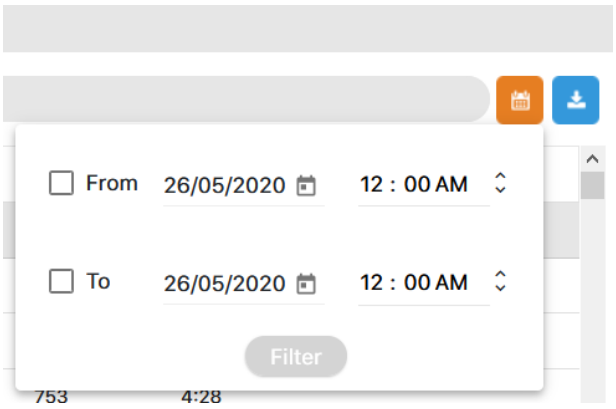
You may view/edit Call Attached Data (CAD) fields.

You can utilize the search function to locate a number, name, etc. The example below shows a search for “bill” returns all Bill items to the top.



A date and time filter may be applied to the call log.

- Click the filter by date icon

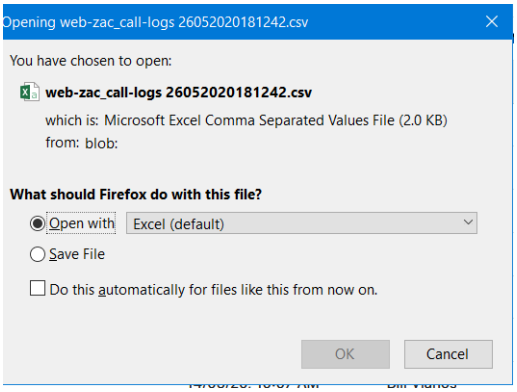


- Check the box and enter the desired From date/time
- Check the box and enter the desired To date/time
- Click Filter

2.6.2 Call log export

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

- Click the Save to .cvs icon

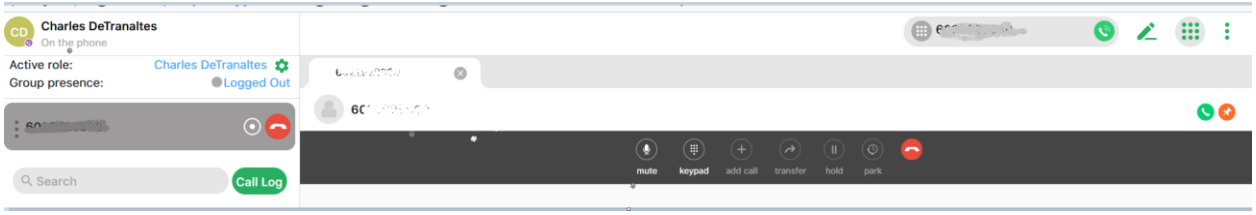


- Click Open or Save File

2.6.3 Blind Transfer

A Blind Transfer is when you transfer the caller to another person/destination without speaking the new destination first. This also may be referred to as unattended, or unsupervised transfer.

Press the Transfer icon in the dial screen. Start typing the desired contact. Once found, click the transfer icon to complete the transfer.



2.6.4 Attended Transfer

In an attended transfer, one party transfers another party to a new location by first dialing the transfer destination and only completing the transfer when ready. The initiating party is attending or supervising the transfer process by contacting the destination before completing the transfer.

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

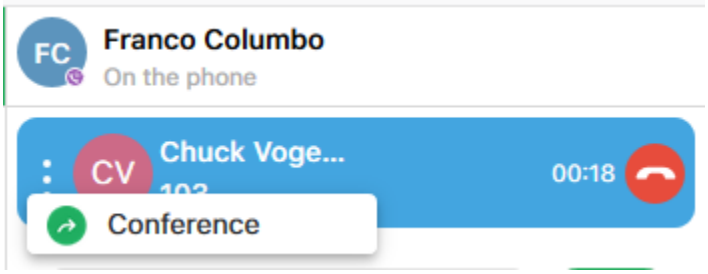
To transfer the call:

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

2.6.5 Ad Hoc Conference

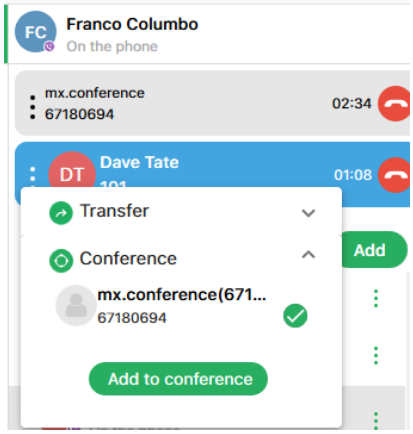
You may create and add a party to a conference.

While on a call, establish the MXconference session by clicking the Conference option:



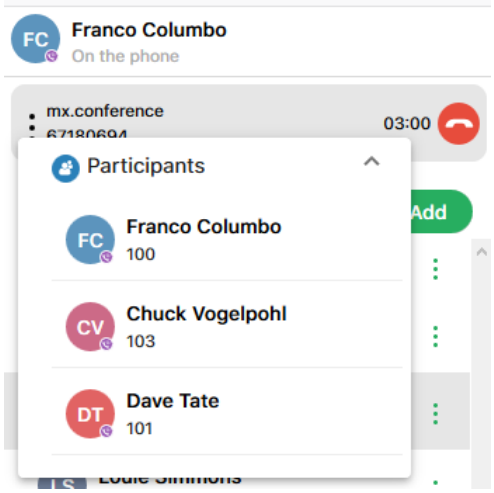
Call the desired party to add to the conference. Click on their session bar and select the MXconference.

Click Add to conference



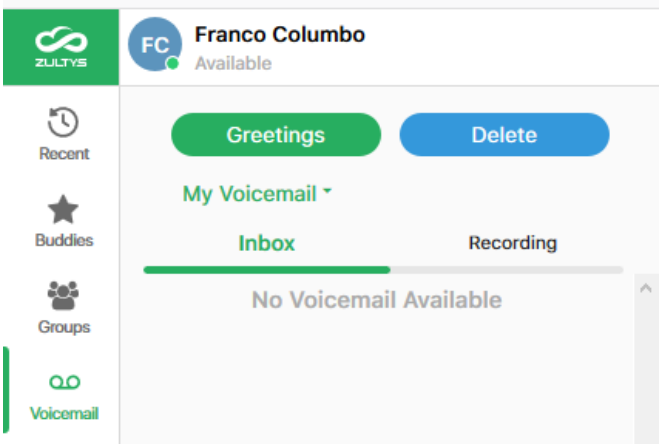
The called party is now added to the conference.

You may view the participants:



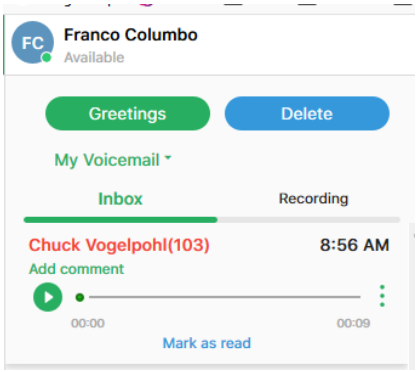
2.7 Voicemail Screen

This screen is for the user to access and manage voice mail, on demand call recordings, and voice mailbox greetings.



You may choose to view your inbox, recordings, or deleted box. A list of new or read voicemail will appear in the inbox. Voicemail that have been deleted appear in the deleted box. Selecting the Recordings item will display a list of on demand call recordings you have.

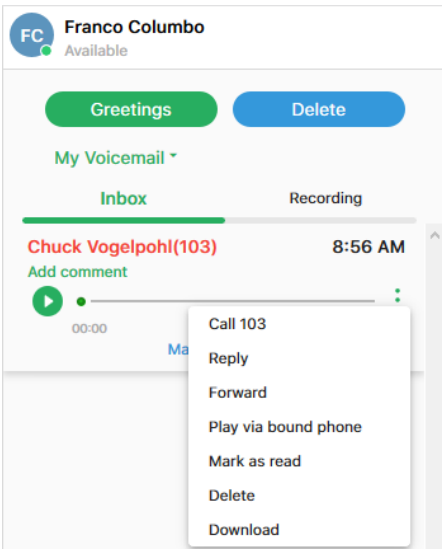
When you click on a message or recording the options for the message will be presented:



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

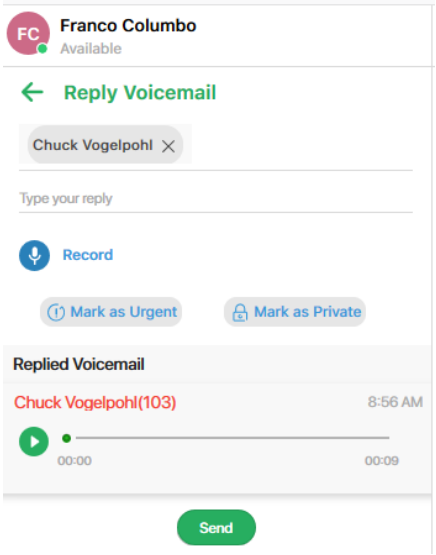
Play/Replay/Pause – Allows you to listen or pause the message. You may also click on the sound bar to slide to any point of the message.

Click the ⋮ icon to view more options:



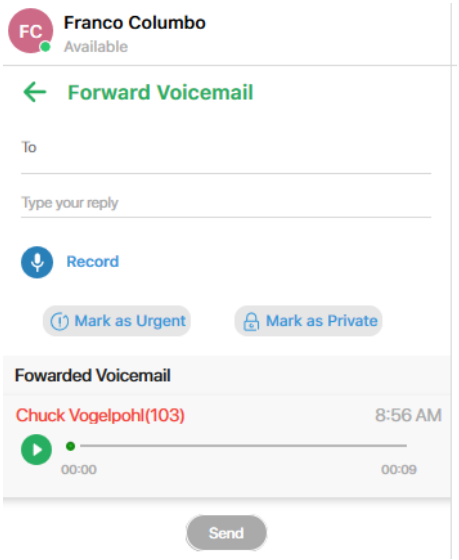
Call – Place a call back to the party that left the message.

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



Forward – This allows you to forward the message to a mailbox of another user. Optionally, you may record a pre-amble message to the forwarded message.
When you forward a message, you can start typing the destination

forward party in the To field. WebZAC will display matching names in the directory as you type.

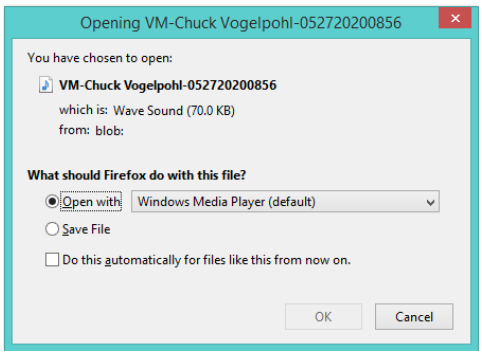


Play via Bound – This allows you to listen to the message on your desktop phone instead of your PC if desired.

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

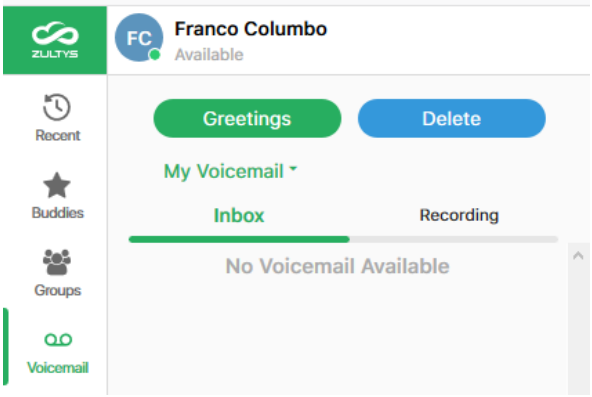
Delete – Deletes the message from the current box. A confirmation will be required for deleting from 'Delete' box.

Download – Allows a download of the voice message onto your local storage.

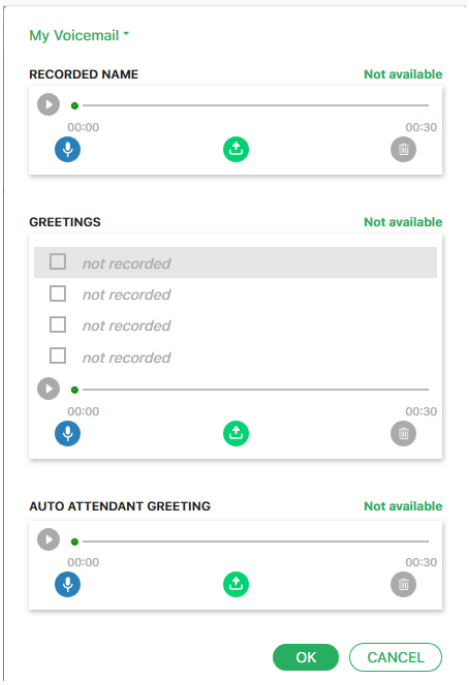


2.7.1 Voicemail Greetings

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



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



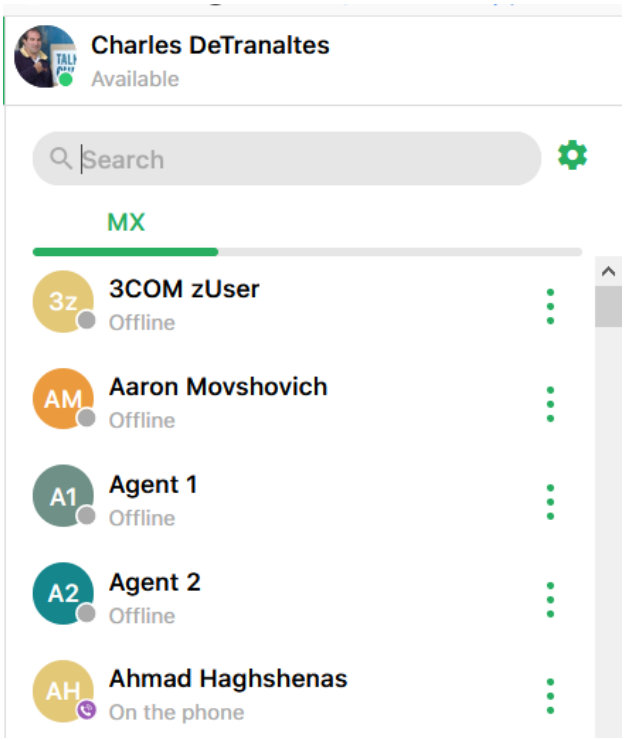
Recorded name – This allows you to import, record, or delete a user name that is associated with your mailbox.

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

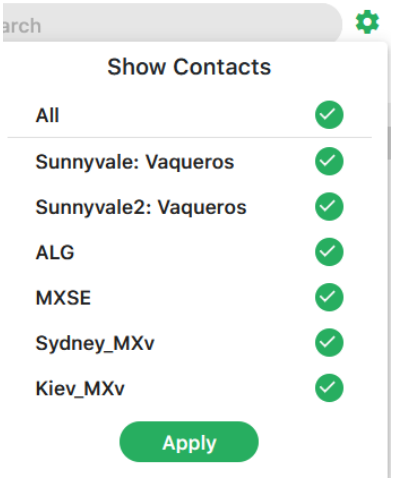
Auto Attendant Greeting – This allows you to import, record, or delete an auto attendant greeting that is associated with your mailbox.
The MX auto attendant routes calls to system users. Prior to routing a call to your phone, the auto attendant can play your greeting, recorded name, or extension to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

2.8 Contacts Screen

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

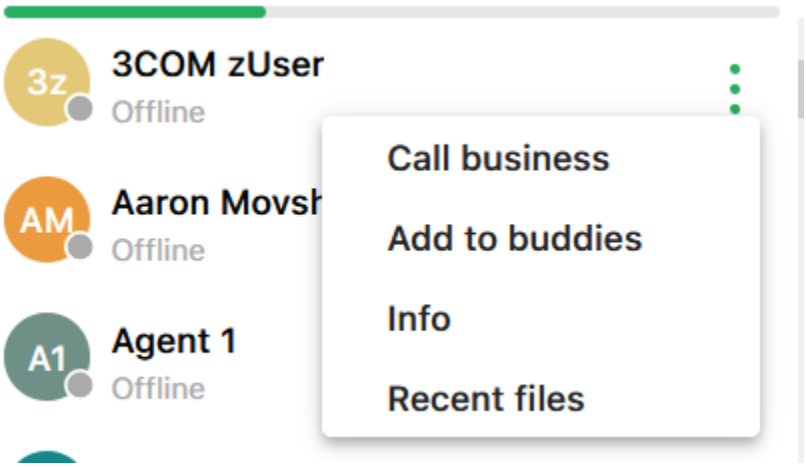


You can filter the contacts by locations when in an MXnetwork by clicking the Contacts Settings icon . Select the desired locations you want to display. All the contacts from that location will be added to your contact list.



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

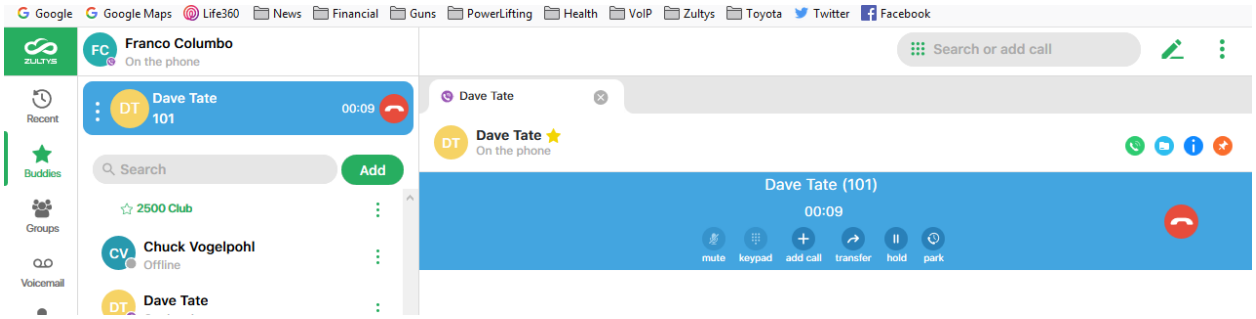
You may click on the ⋮ icon to display more options:



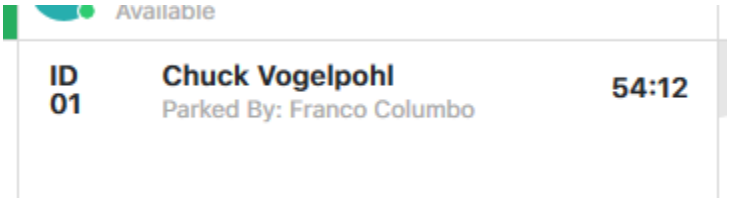
2.9 Parked Calls Screen

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

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



When a call is parked the screen will display:



ID – The park slot ID

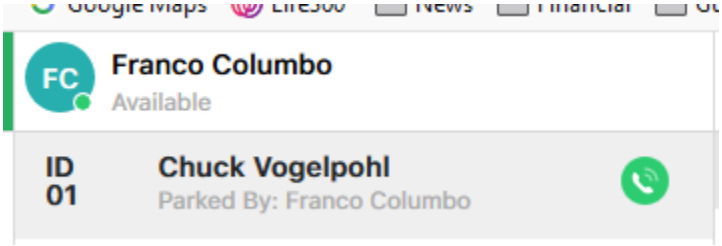
Caller – The caller that was parked

Parked by – The user who parked the call

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

To retreive a parked call:

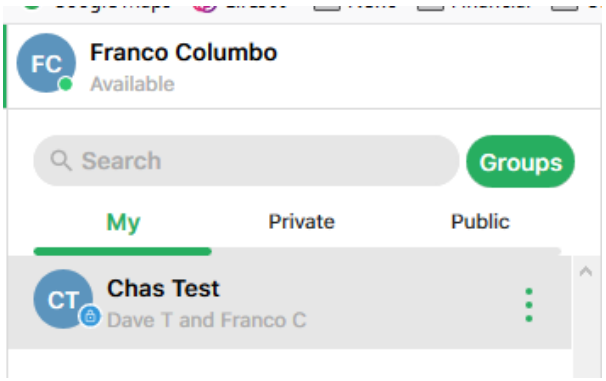
Click the handset icon on the parked call.



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 WebZAC 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.

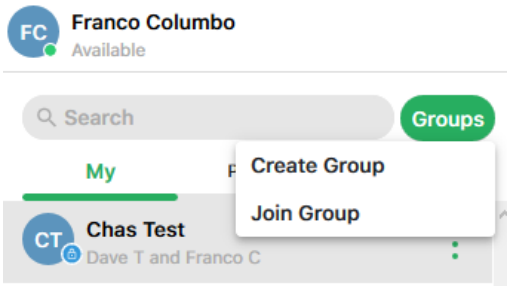


Public groups allow any user to join the group without requiring approval. Private groups require the owner of the group to add members to the private group.

To create a new group:

Click the Groups icon

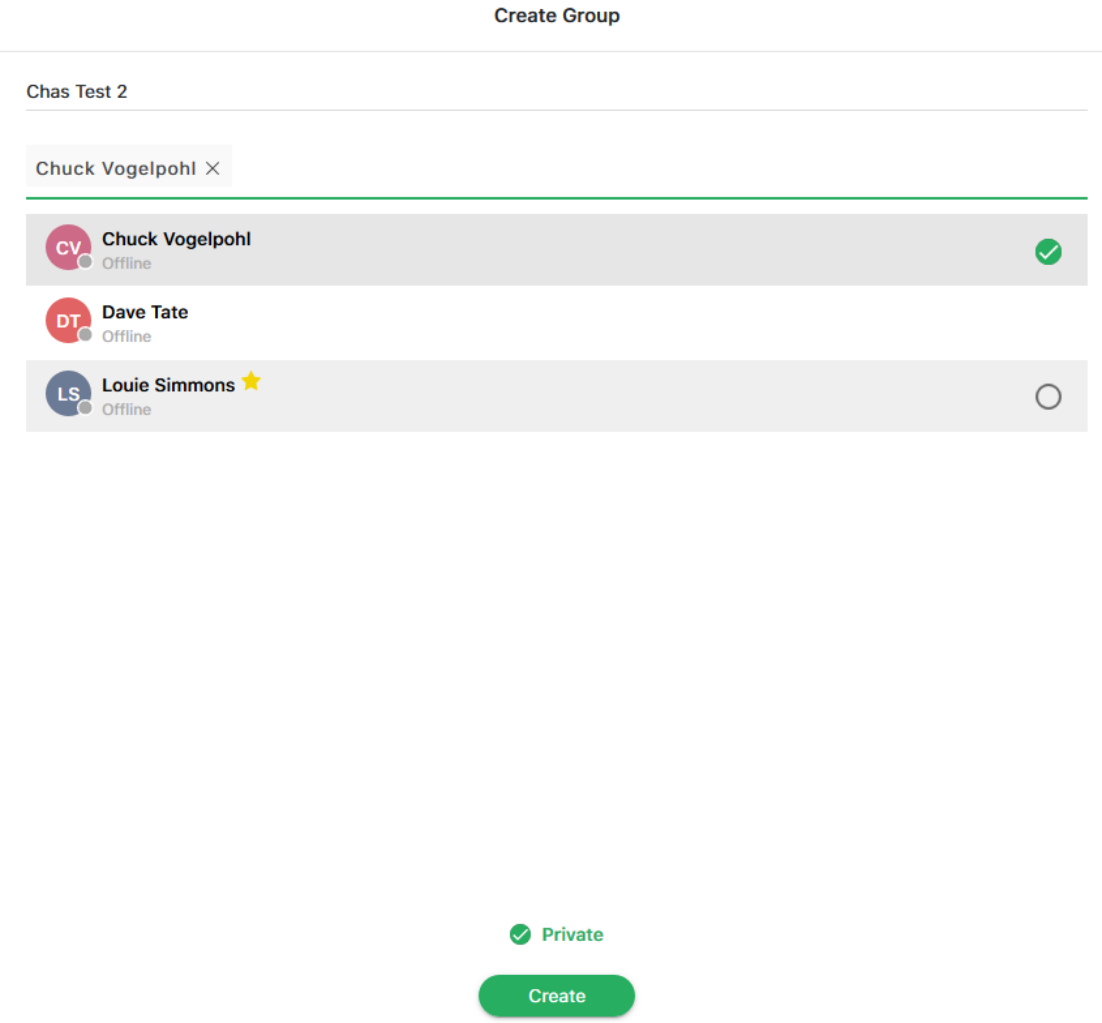
Select Create Group



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 selecting them next to their name

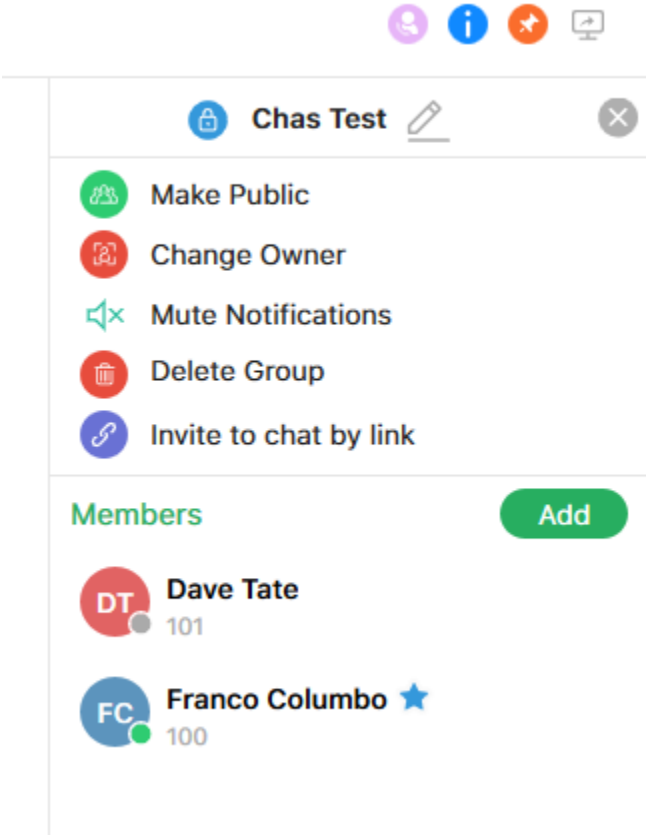
Check the box if the Group is to be a Private type group. If this is not selected, the group will be a public group for all users to view/join.



Click Create.

To edit a group:

Click the icon next to the desired Chat group and select Info:



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.

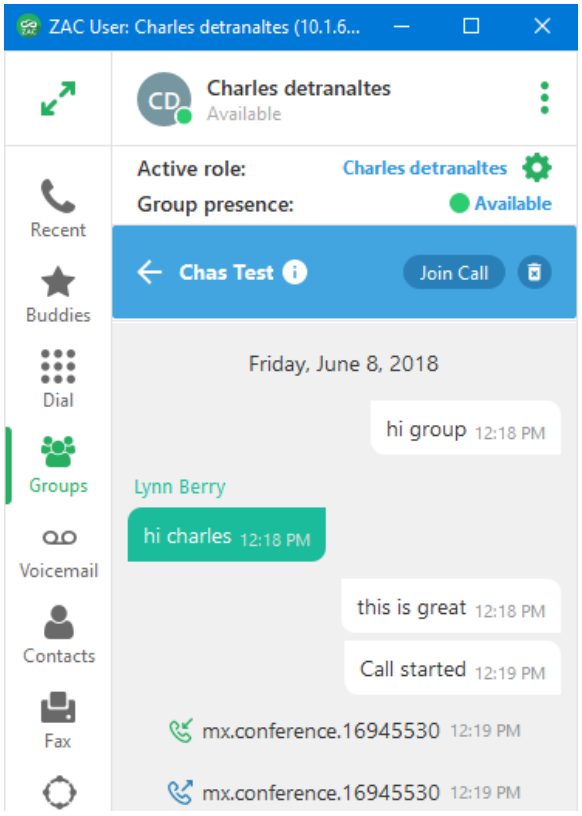
Delete Group – This action will delete the existing group. You will be prompted for a confirmation to delete.

Invite to Chat by link – This action will create a web link that can be sent to external parties so they may join the chat session. When you click this option the link will be copied to the clipboard.

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

To view/converse the group chat:

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

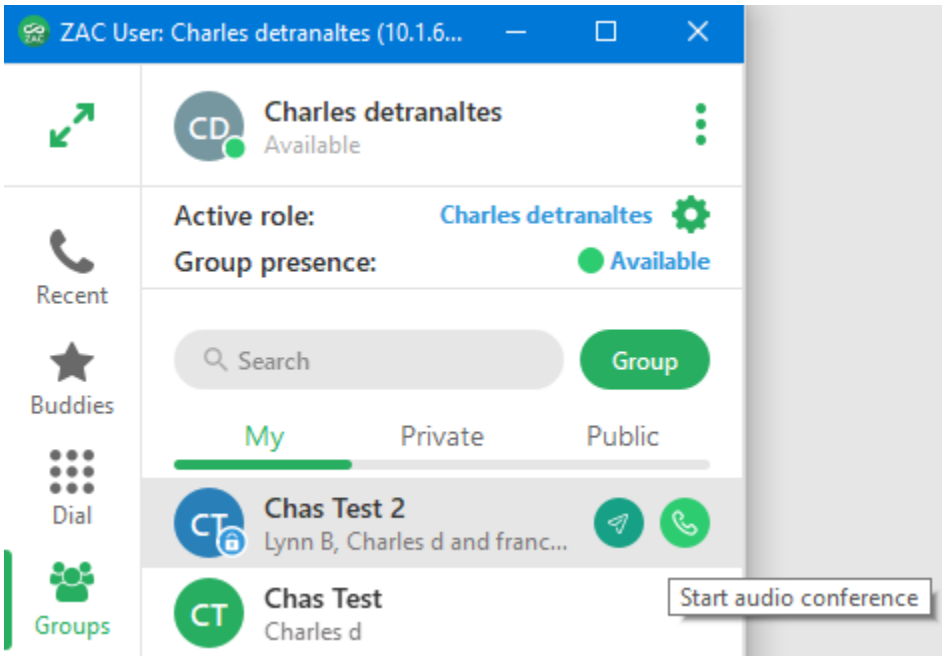


You will see the most recent message threads. Type your text in the text box and press to send or press ENTER key on the keyboard.

In maximized 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



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:

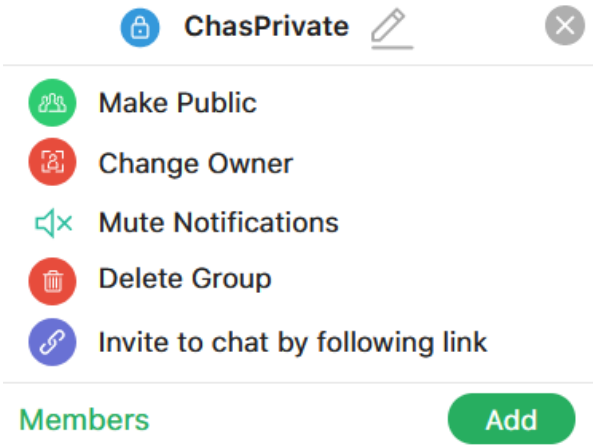
While in the desired group, select the call group participants icon

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.

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.

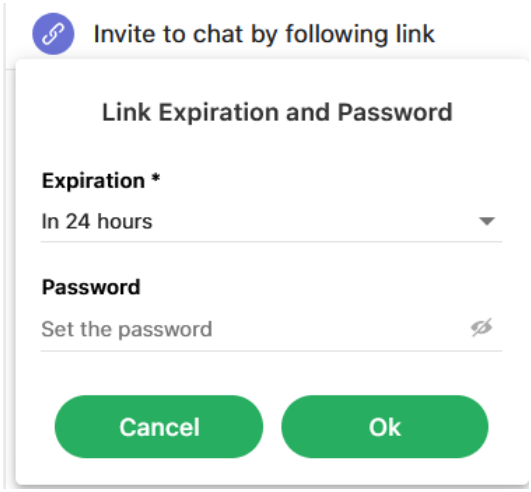
Click on the Invite to chat by link



A link URL will be copied to the clipboard

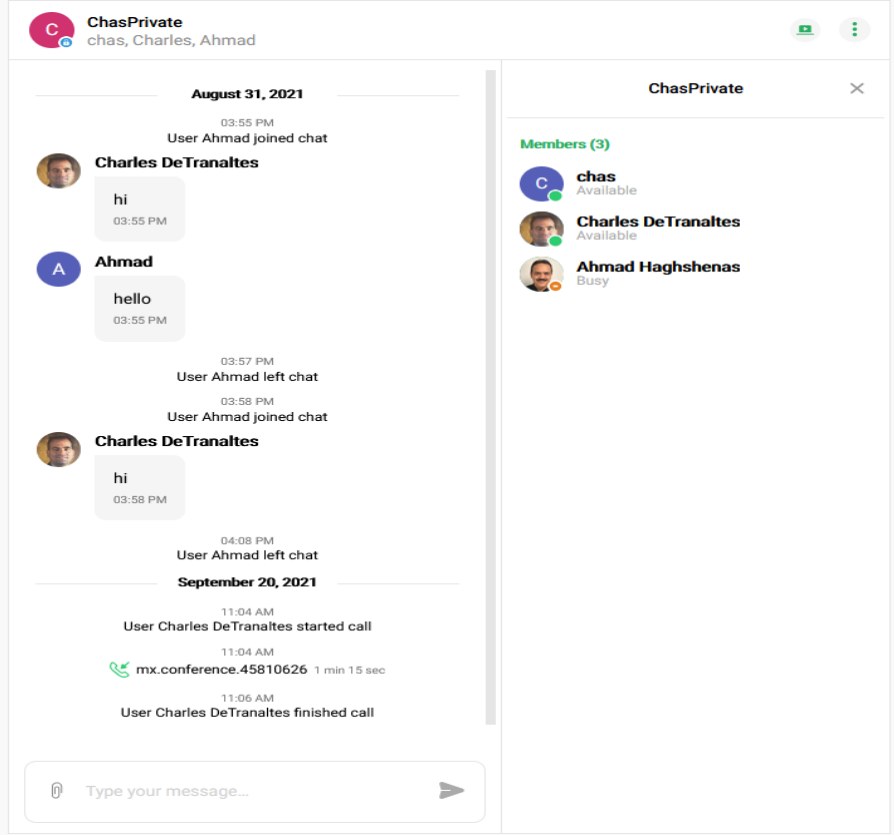
Select an expiration time for the link

Set an optional password for the link. The external user will be required to enter this password for access.

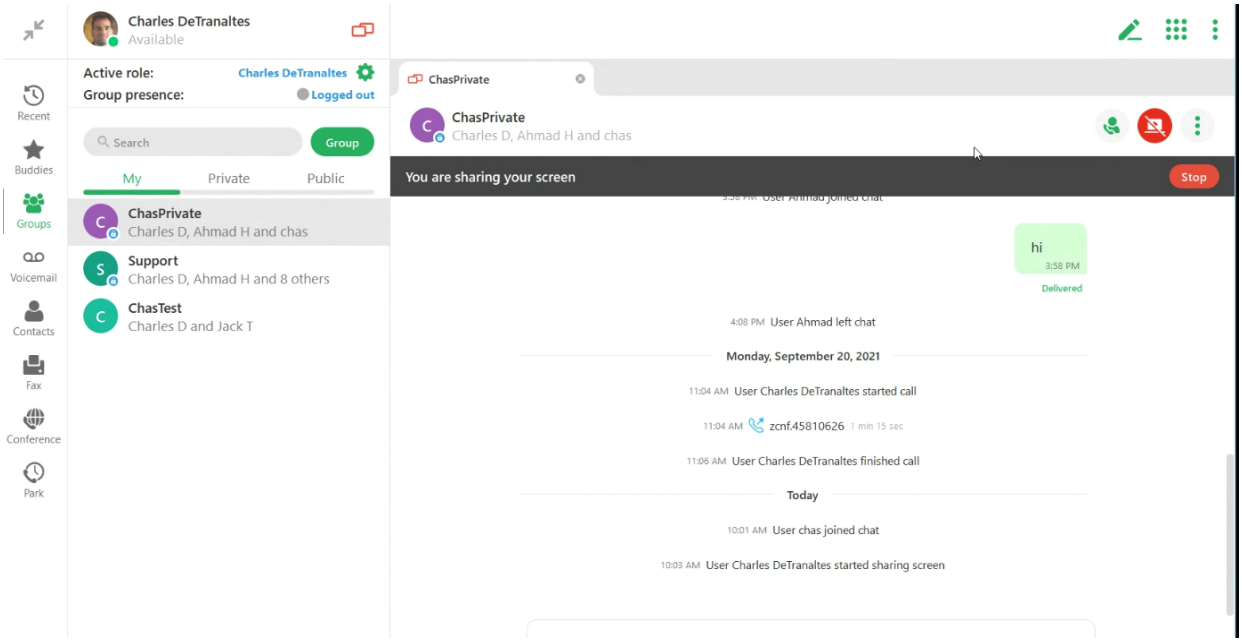


Send the link to the desired external party

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

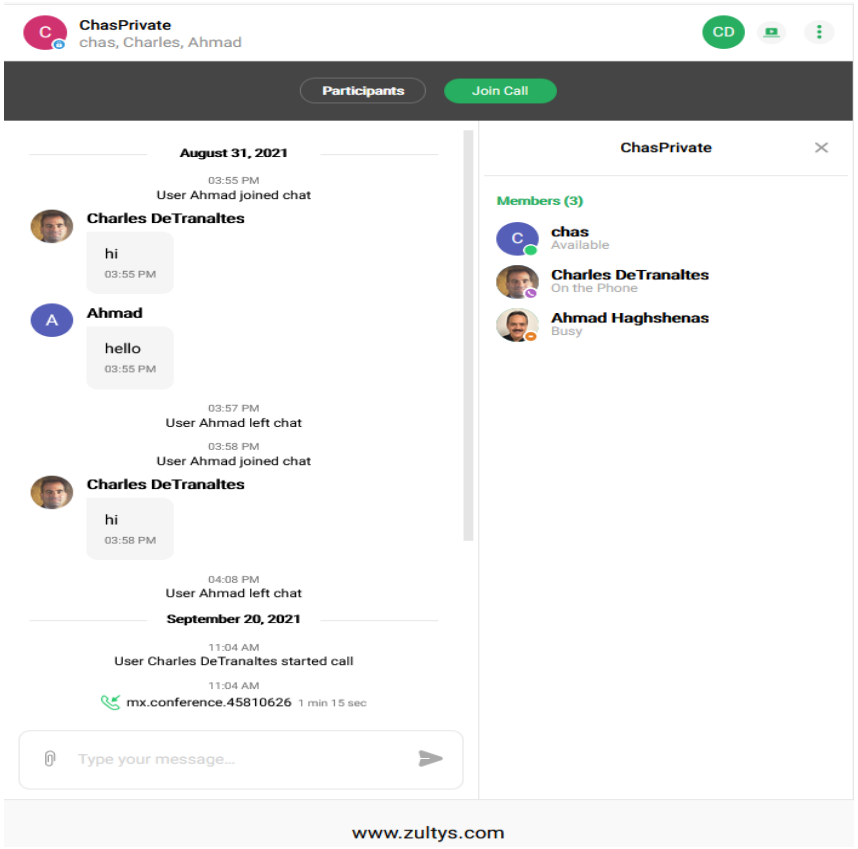


- **Guest viewing a screen share**

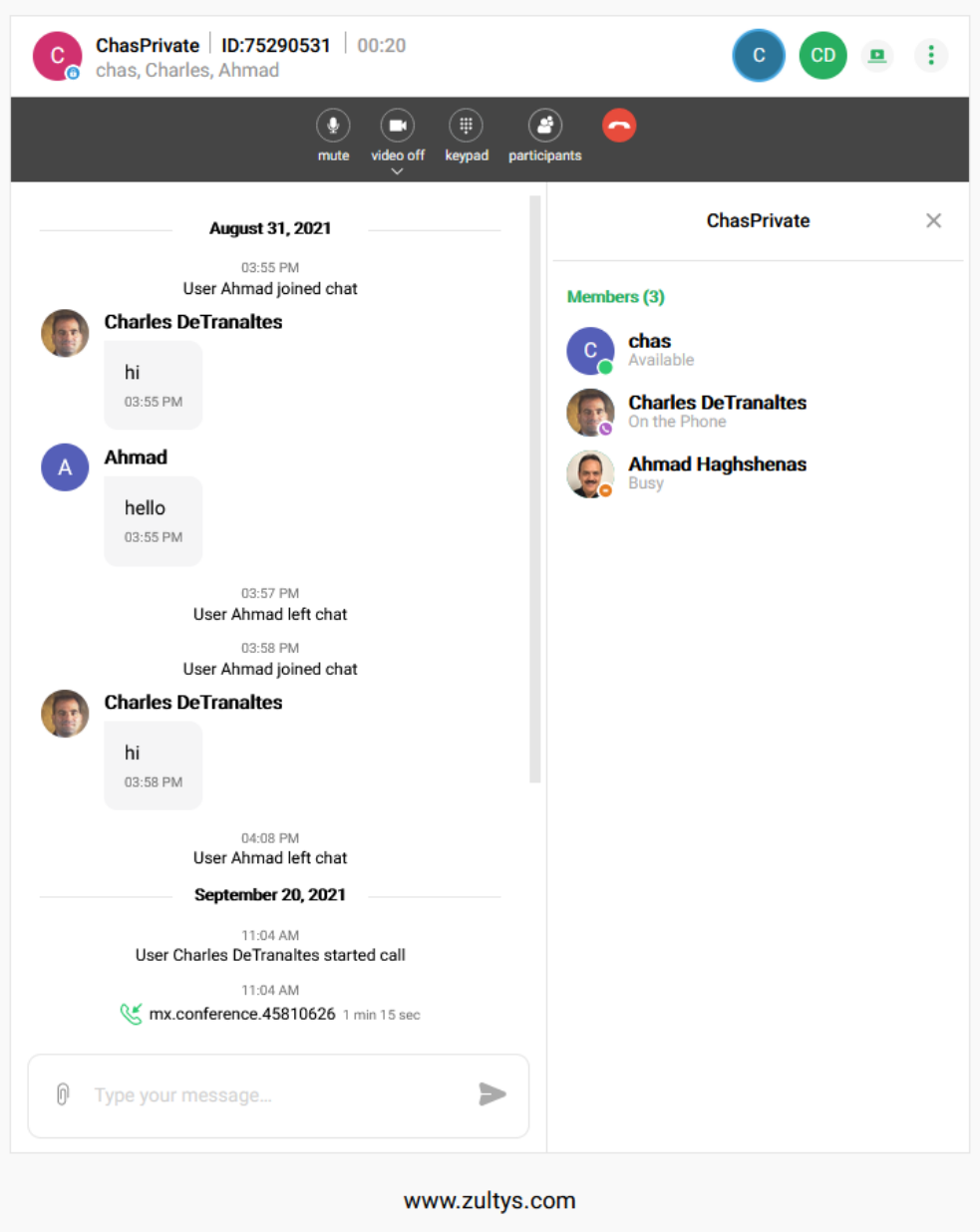


Click Stop to end the viewing session.

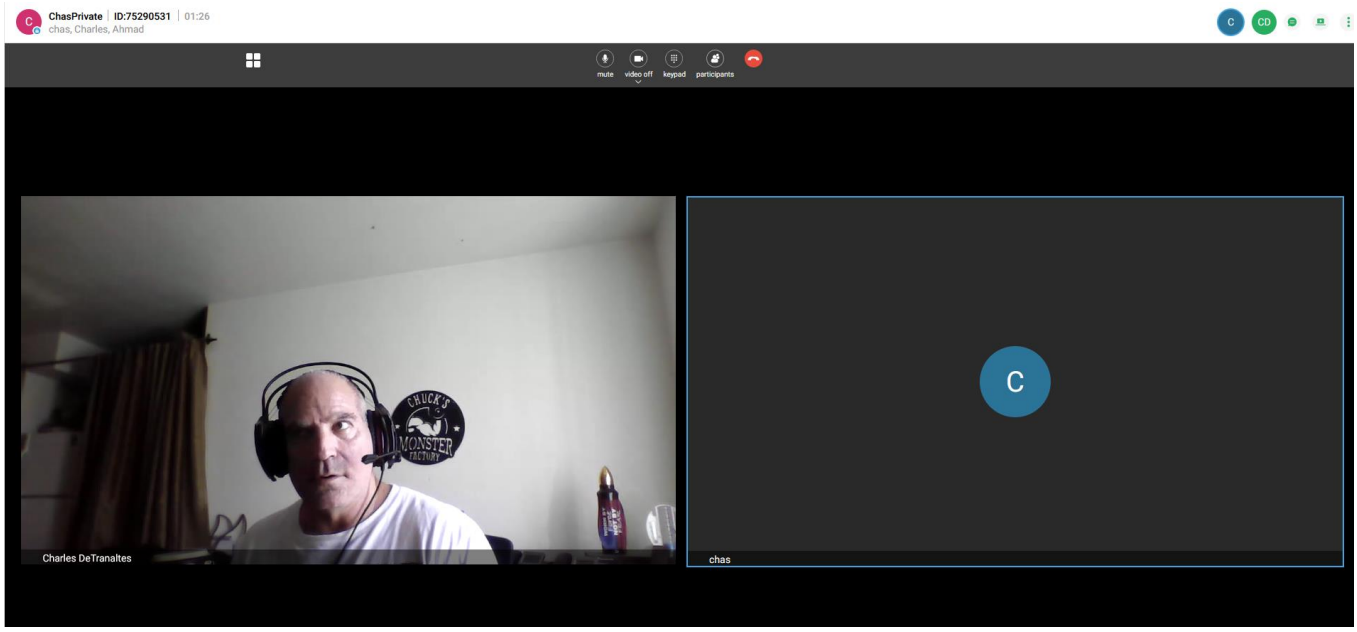
- **Guest Joining a conference call**



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

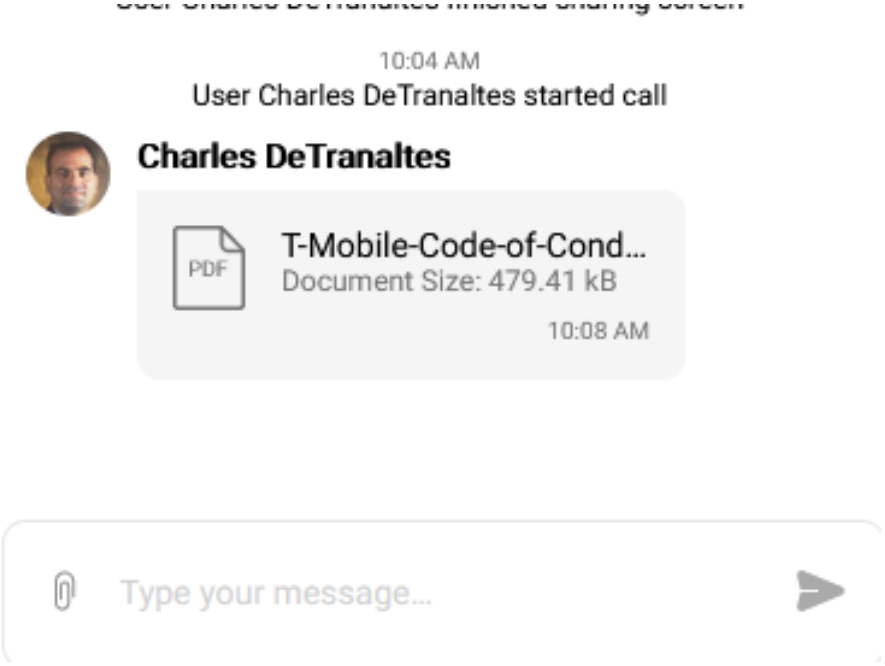


- Guest viewing video



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

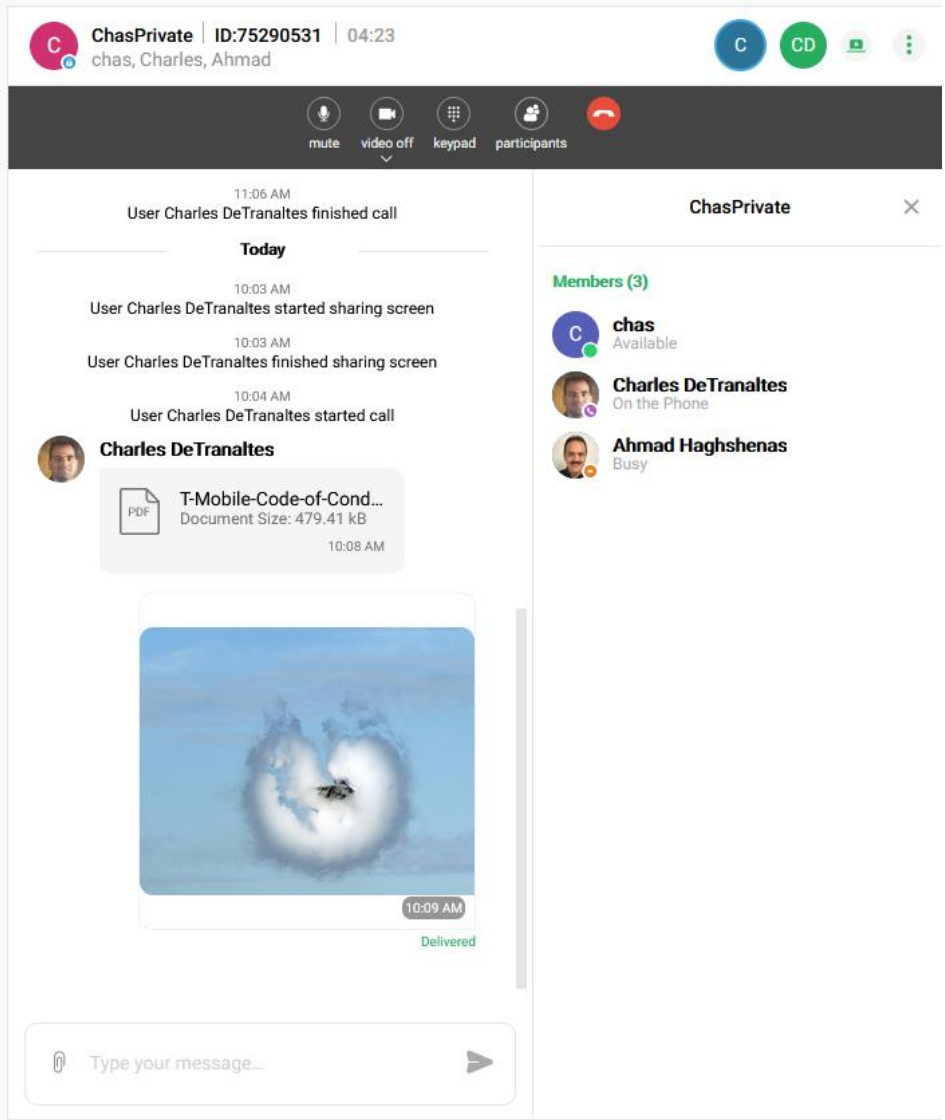
- **Guest receiving file share**



- **Guest sending a file**

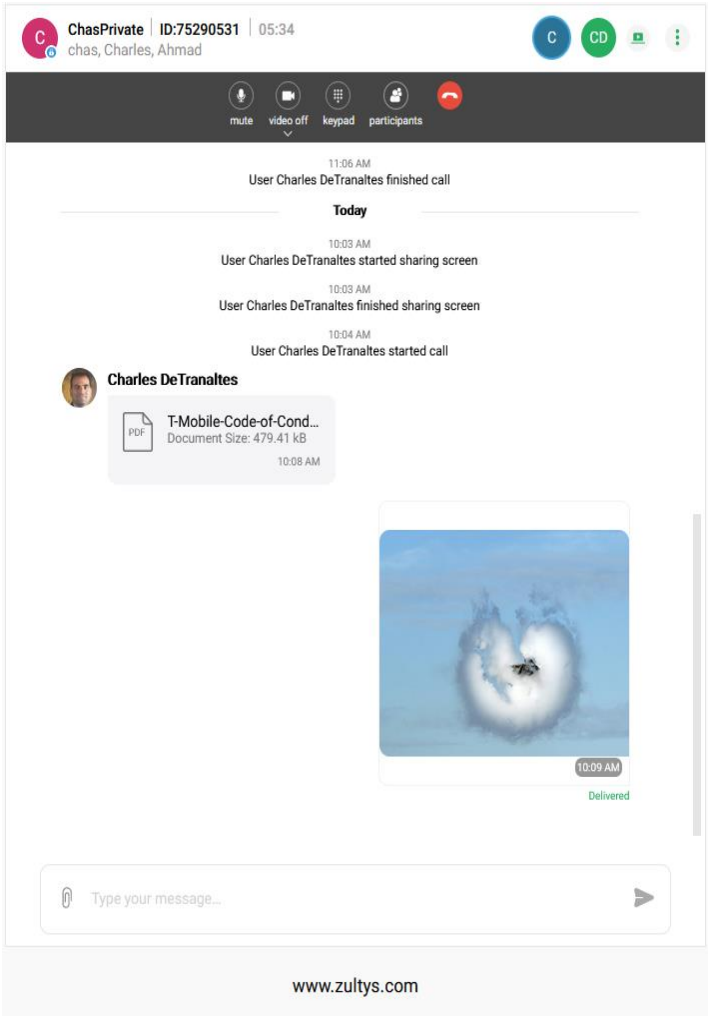
Click the paperclip icon in the chat area.

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



- **Guest minimizing participant screen**

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

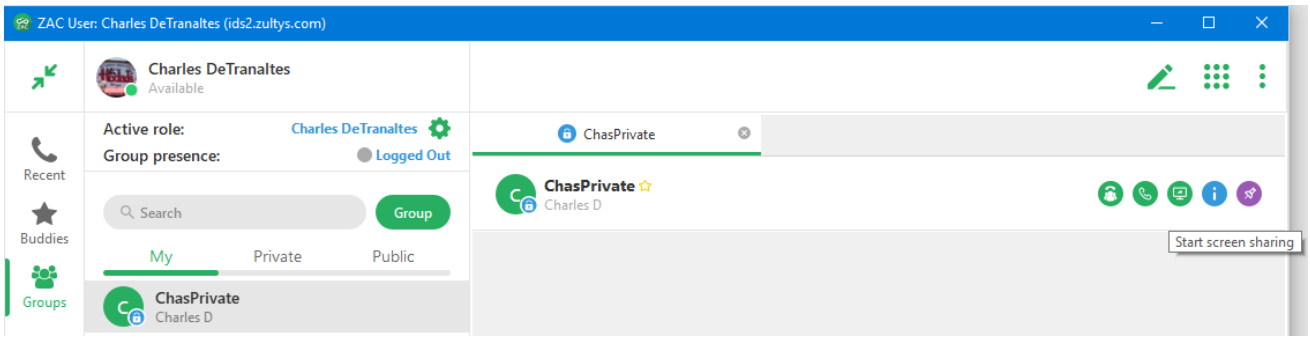


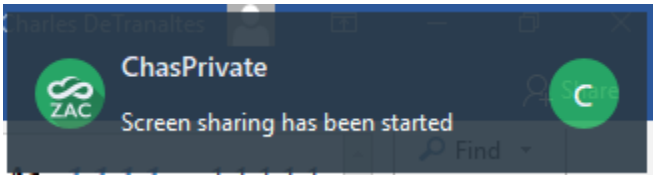
NOTE: The external chat link remains active for the expiration time set in the link invitation.

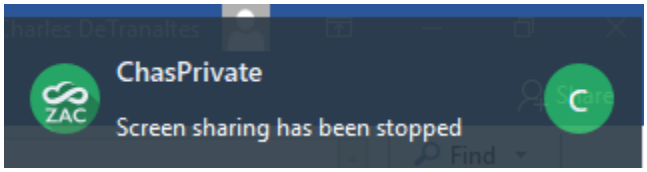
2.10.2 Screen Sharing

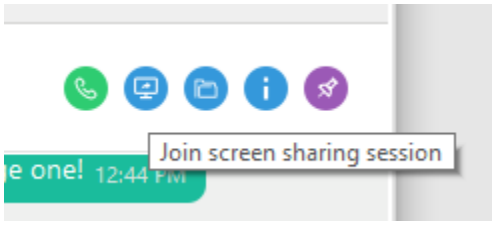
You may share your screen with other group members in a Chat session(internal and external). You must be in maximized screen mode to utilize this feature.

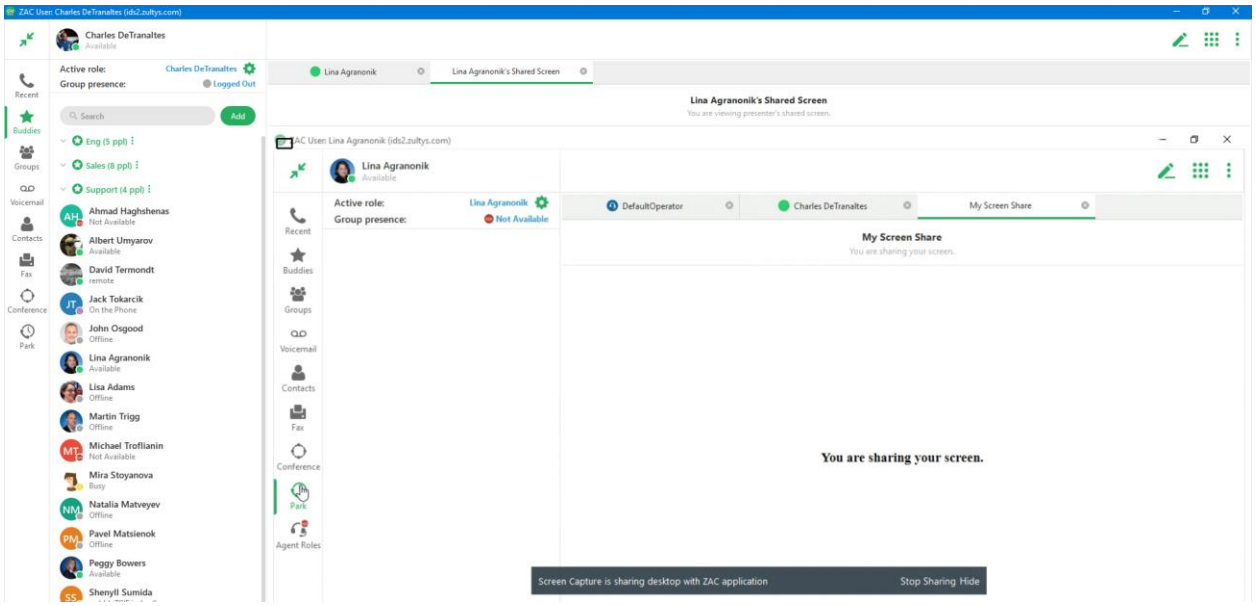
While in the Chat group, click the share screen icon


ZAC User: Charles DeTranaltes (ids2.zultys.com)
Charles DeTranaltes
Available
Active role:
Charles DeTranaltes
Group presence:
Logged Out
Recent
Buddies
Groups
Search
Group
My
Private
Public
ChasPrivate
Charles D
ChasPrivate
ChasPrivate
Charles D
Start screen sharing


ChasPrivate
Screen sharing has been started


ChasPrivate
Screen sharing has been stopped


Join screen sharing session


ZAC User: Charles DeTranaltes (ids2.zultys.com)
Charles DeTranaltes
Available
Active role:
Charles DeTranaltes
Group presence:
Logged Out
Search
Add
Eng (5 ppl)
Sales (8 ppl)
Support (4 ppl)
Ahmad Haghshenas
Not Available
Albert Umyarov
Available
David Termondt
remote
Jack Tokarcik
On the Phone
John Osgood
Offline
Lina Agranonik
Available
Lisa Adams
Offline
Martin Trigg
Offline
Michael Troflianin
Not Available
Mira Stoyanova
Busy
Natalia Matveyev
Offline
Pavel Matsienok
Offline
Peggy Bowers
Available
Shenyll Sumida
Recent
Buddies
Groups
Voicemail
Contacts
Fax
Conference
Park
Lina Agranonik
Lina Agranonik's Shared Screen
Lina Agranonik's Shared Screen
You are viewing presenter's shared screen.
ZAC User: Lina Agranonik (ids2.zultys.com)
Lina Agranonik
Available
Active role:
Lina Agranonik
Group presence:
Not Available
Agent Roles
DefaultOperator
Charles DeTranaltes
My Screen Share
My Screen Share
You are sharing your screen.
You are sharing your screen.
Screen Capture is sharing desktop with ZAC application
Stop Sharing
Hide

3 SMS 2.0 Service

3.1 Description

Zultys SMS 2.0 option allows customers to initiate and receive SMS messages using WebZAC The WebZAC interfaces has been designed to streamline and make sending SMS messages easier and intuitive.

3.1.1 Requirements

- **MX Version** – Must be 16.0.2 (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.

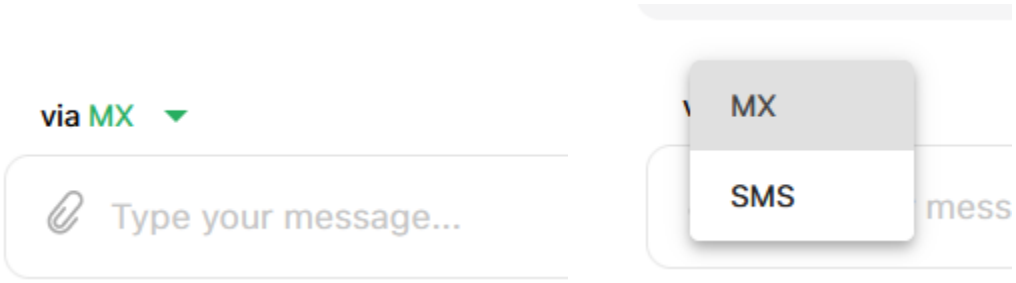
3.1.2 Overview Process

- 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.
- External SMPP must be configured and SMS enabled SP trunks connected to the MX system if you are utilizing your own SMS service provider. Information on configuring this is provided by your SMS service provider.

3.2 Operation

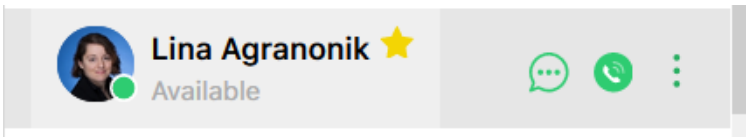
3.2.1 Sending SMS Messages

You may 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 of the chat bar. You may select MX or SMS by clicking and selecting the desired “via” option:

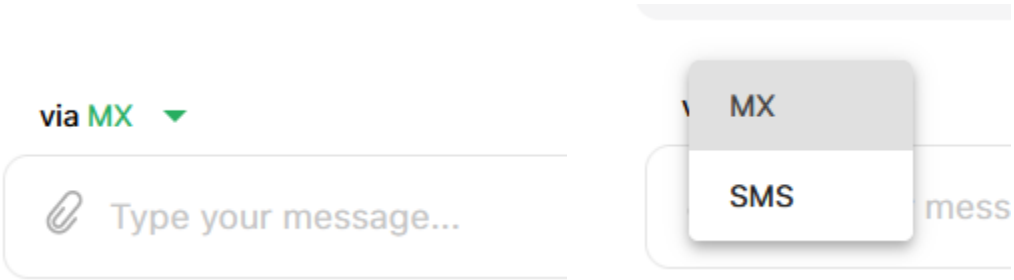


Select either the MX(internal) message or the SMS option to send to the users’ mobile phone:

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

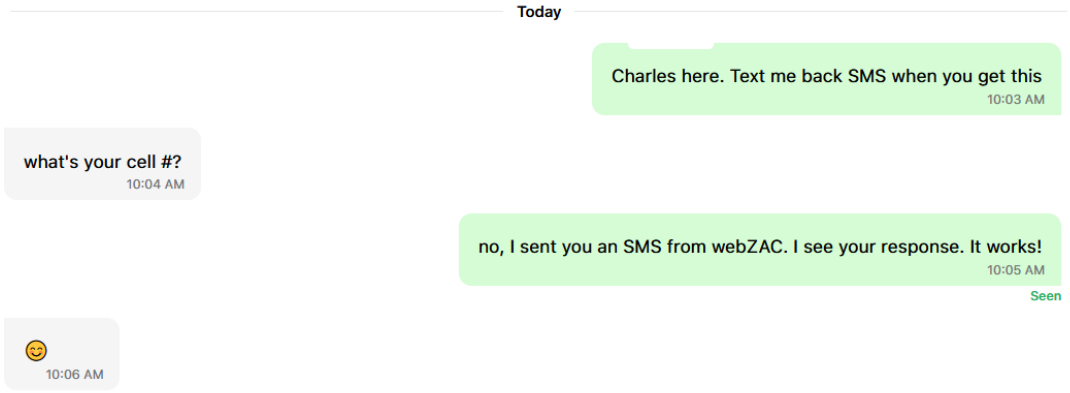


1. The Chat window will appear for the selected user.
2. Select the SMS option from the “via” option.



3. At the chat screen, enter your message and press ➤.

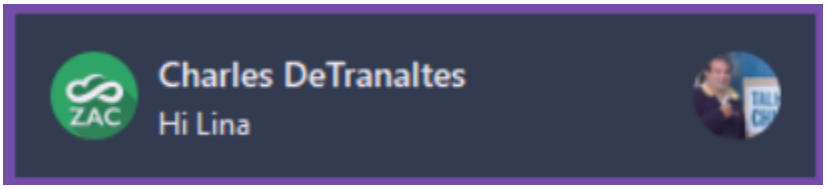
4. You will see the response in the Chat area. Continue to enter/receive responses in this area.



3.2.2 Receiving SMS Messages

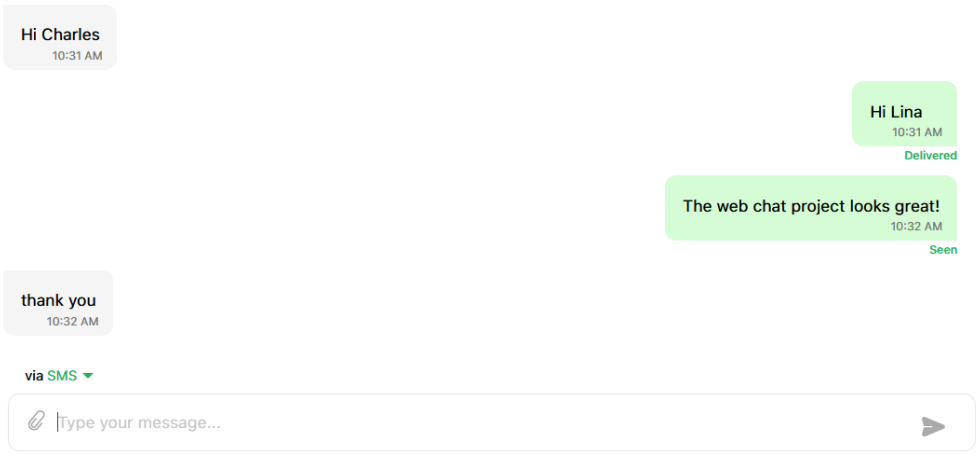
A user may send and SMS message directly to your MX DID number.

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


Hi Charles
10:31 AM
Hi Lina
10:31 AM
Delivered
The web chat project looks great!
10:32 AM
Seen
thank you
10:32 AM
via SMS
Type your message...

4 Video Calling

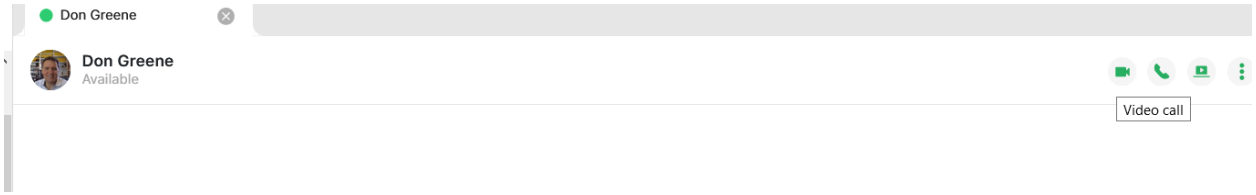
WebZAC allows users to place user to user or multi-party video calls form the application.

4.1 User to User

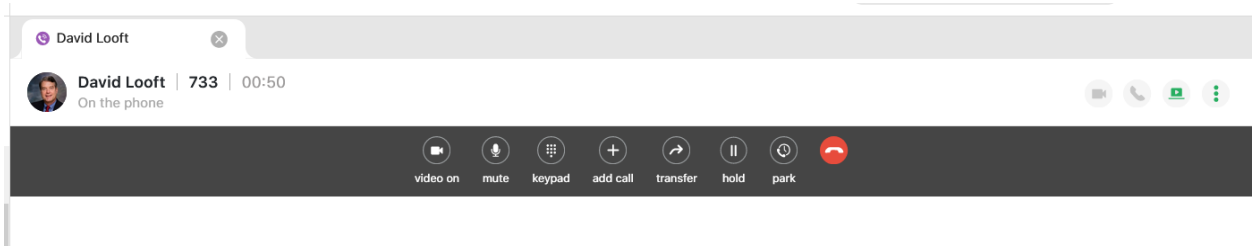
WebZAC now has user to user video calling capability starting in MX 16.0.4. This allows WebZAC users to place video calls to other WebZAC and WebZAC users.

NOTE: This feature is release as Early Access with version 16.0.4.

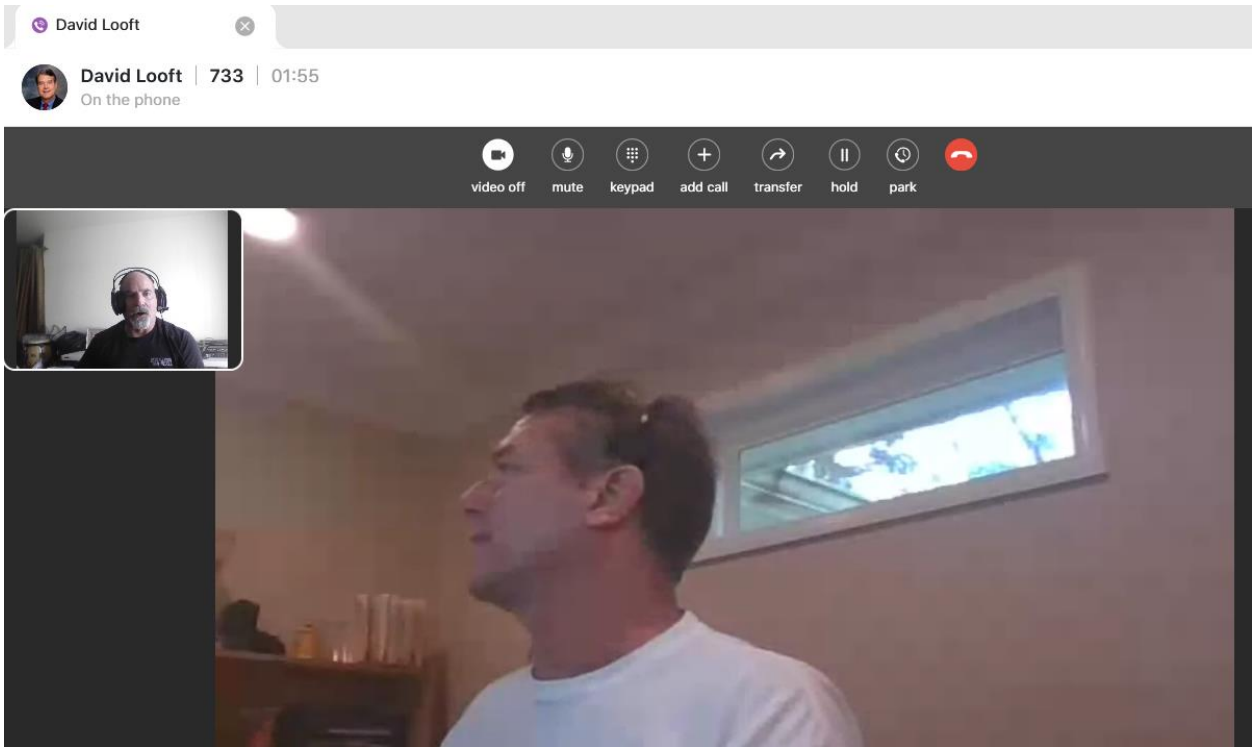
While in a user tab, click the Video call icon

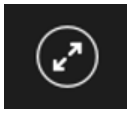


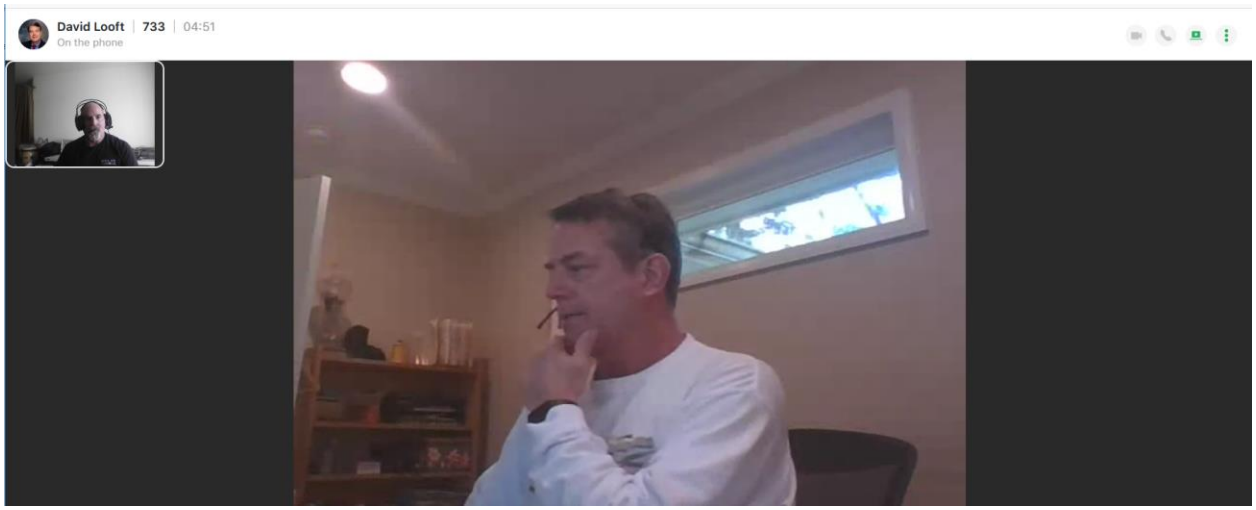
A call is placed to the user and they will see your video when they answer:



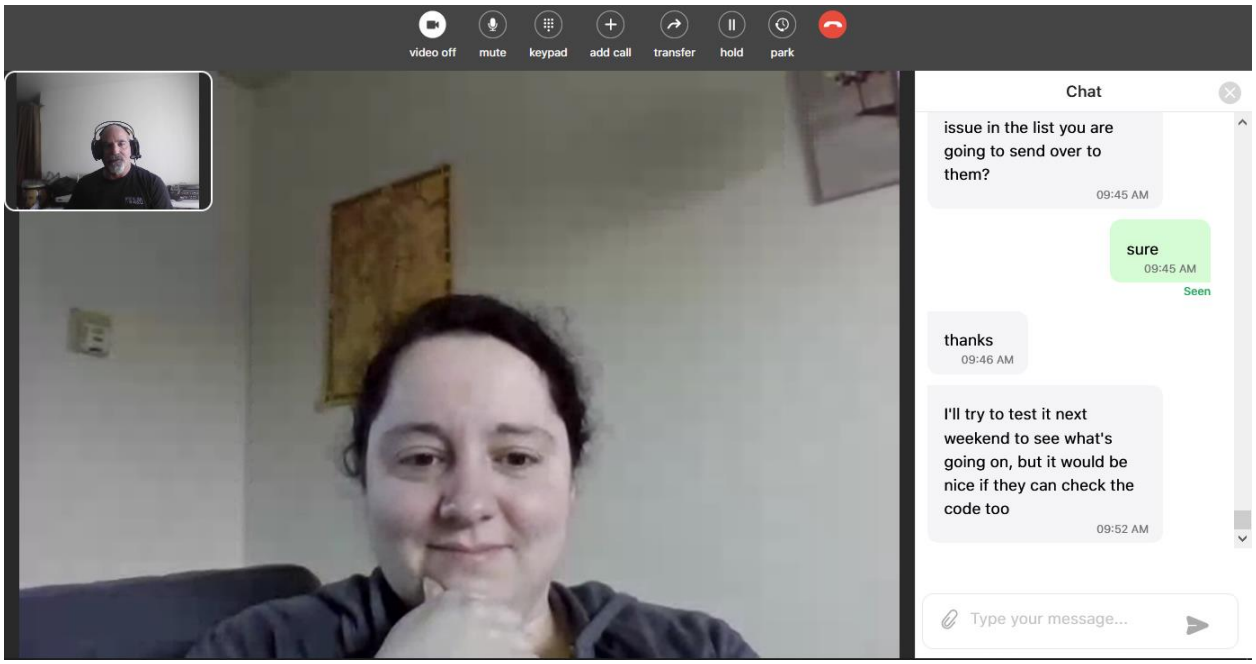
The called user clicks the Start video icon in the session bar to start their video.



To maximize the video window, click the  icon

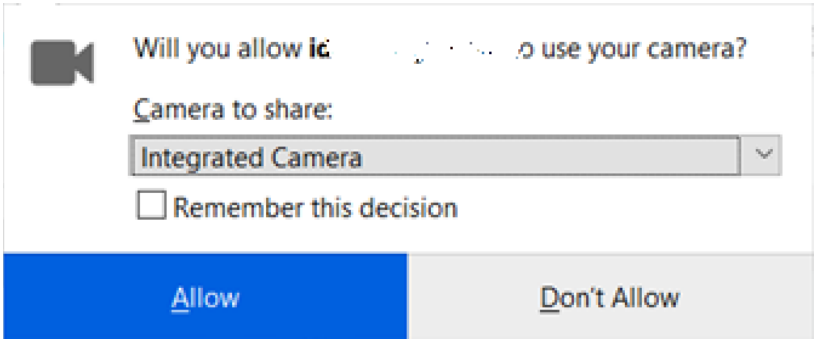


To open a chat window, click the icon:



4.1.1 Camera Setting

This setting is not available in WebZAC settings. Depending on your browser type, audio/video devices selection may be available in your web browser settings



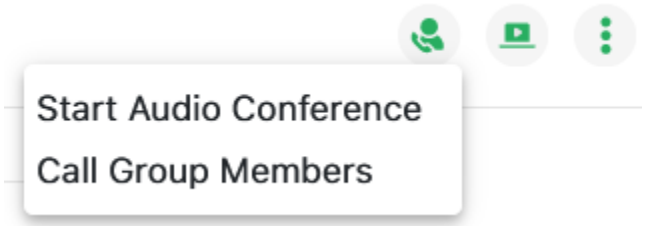
4.2 Multi Party video calls

WebZAC with Release 17 can support multi-party video calling. This feature can be utilized by internal MX users as well as invited external users. The MX will automatically assign an audio bridge for the call as well.

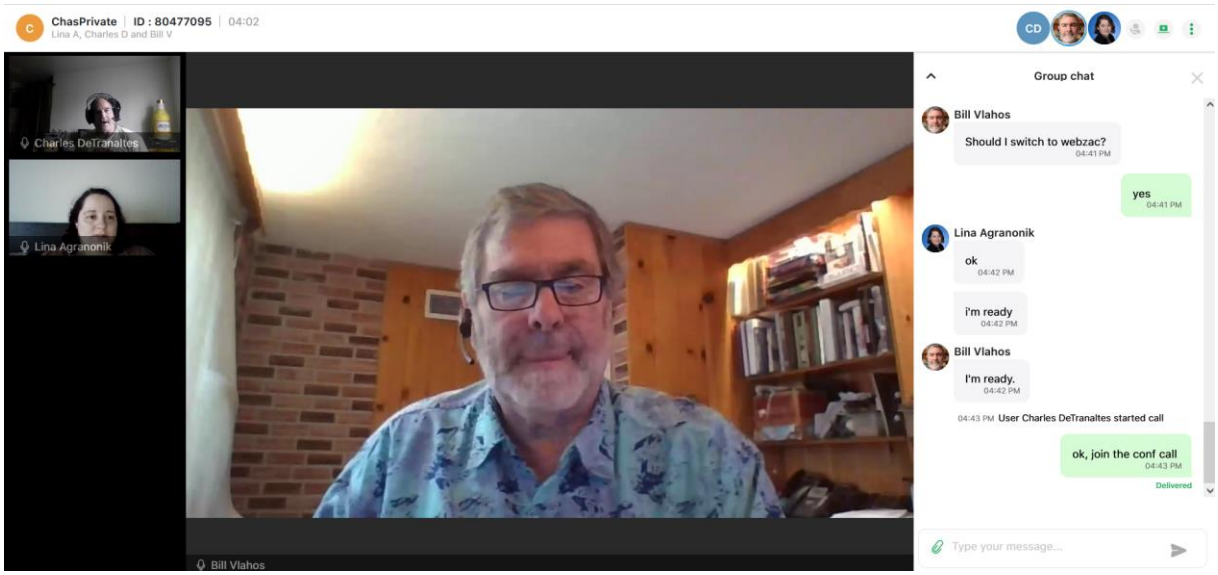
4.2.1 Internal MX Users:

Select the desired Chat group to start the video call in.

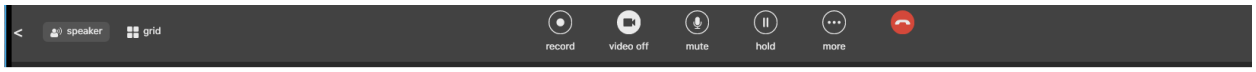
Click the Group call icon and select the desired method to start the audio conference.



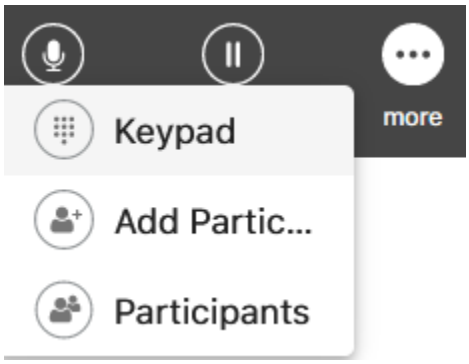
Once the members enter the conference, they can select the Video on icon to enable their camera.



The top of the video screen will reveal the audio and video control toolbar.



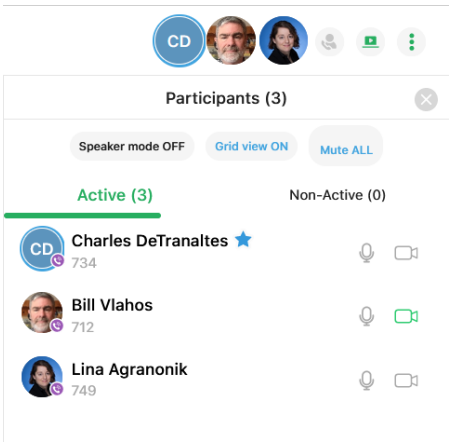
Speaker – Presents the active speaker in the main window.
Grid – Presents a grid view of all participants in the video conference.
Record – Click this button if you want to record the audio portion of the conference.
Video on/off – Toggles your video device on/off.
Mute – Mutes your active microphone.
Hold – Places the conference on hold. You may resume the conference after placing it on hold.
More Options – Click the More icon to display additional options.



Keypad – Displays/hides the keypad.
Add – Allows you add parties to the conference call.
Participants – Displays the participant list as well as available options.

Hang up – Terminates the conference call. All participants are notified.

Participant screen:



Available actions in the participant screen are:

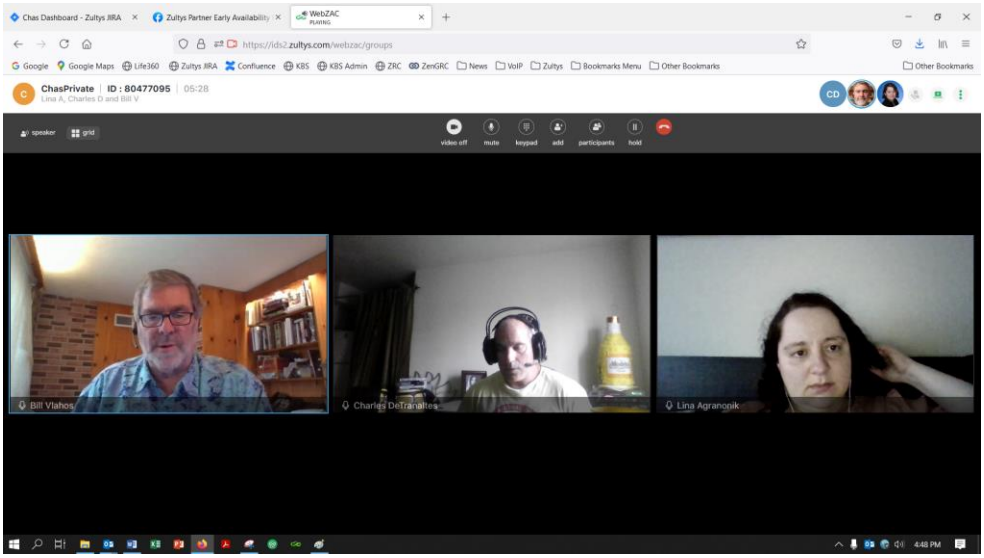
Speaker – Presents the active speaker in the main window.

Grid – Presents a grid view of all participants in the video conference. Toggles this mode on/off.

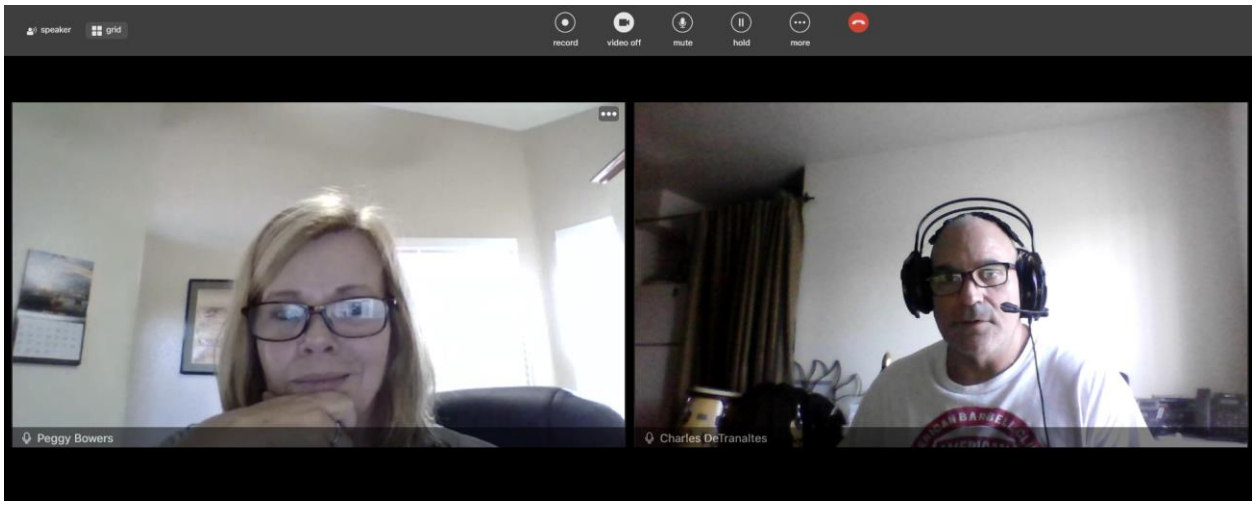
Video on/off – Toggles the individual user video device on/off.

Mute ALL – Mutes all participants microphone audio expect the host.

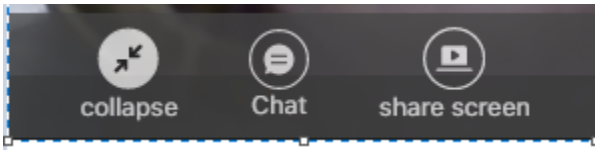
Mute – Allows the host to mute individual participants.



Selecting the Grid view will tile all participants:

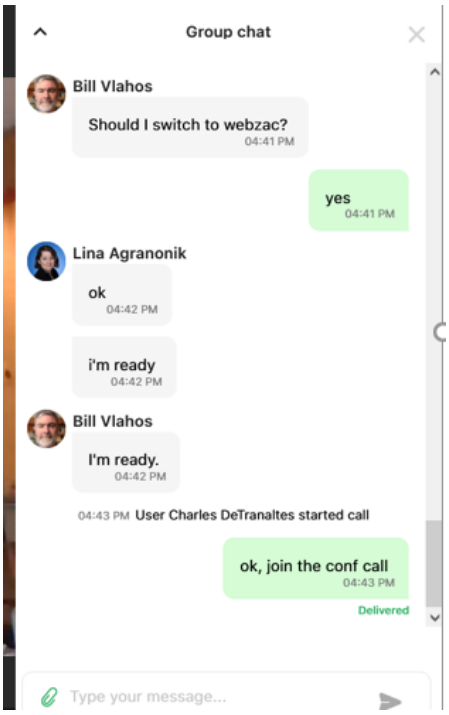


The bottom of the video screen will reveal the expand and chat controls.



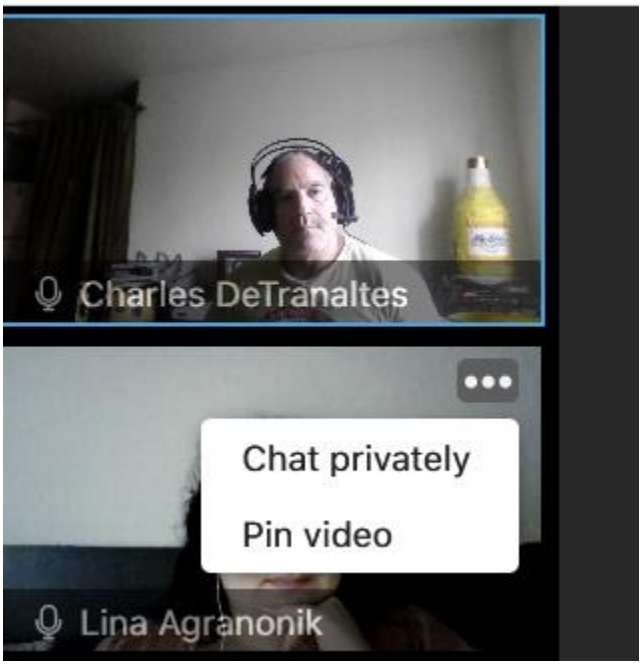
Expand/Collapse – Expands or collapses the screen to maximize or minimize the video viewing area.

Chat – Displays a Group Chat window in a sidebar so that participants can chat with each other.



Chat privately – Allows you to chat with an individual user in the conference. No other conference members will see this conversation.

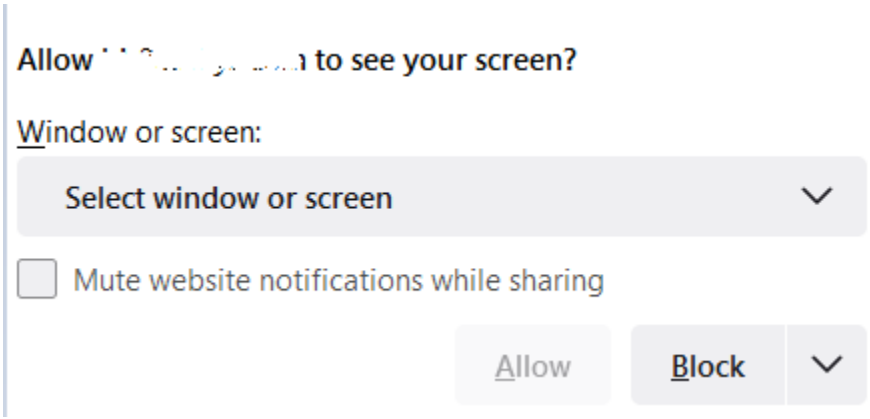
- Click the icon on the desired party to chat with.
- Select Chat privately



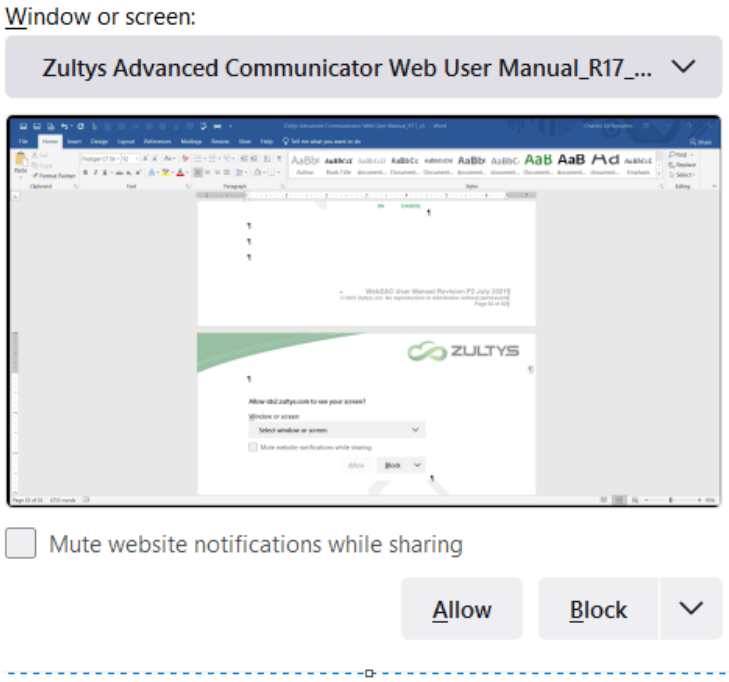
Pin video – Allows you to pin the desired party so that they always remain visible regardless of who the active speaker is.

Screen Share – Allows you to share your screen with conference participants.

Note that browser based permission screens may appear when accessing audio, video and screen share features.



Select the specific screen to share with participants:



Click Allow (or browser specific command)

Click the Stop button or the Stop Share button at the bottom to stop sharing your screen.

5 Call Groups

In addition to logging into WebZAC through your user role, you can also log into any of the ACD, ICC or Operator Groups to which you belong. WebZAC opens a role partition for each group to which you are a member of, and are logged into. WebZAC 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:

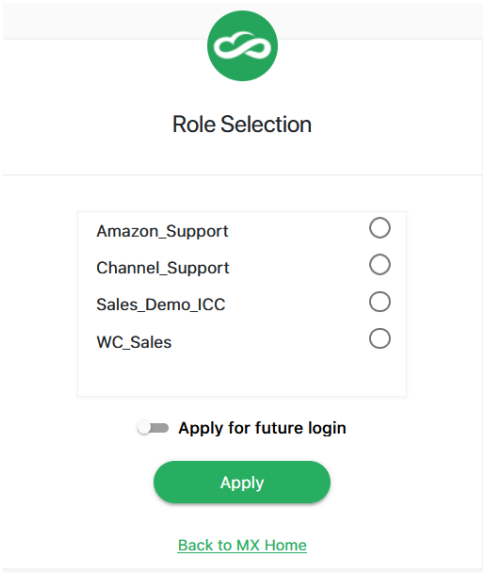
- **Available to On the Phone** triggers when an ACD agent or operator initiates or accepts a call. This rule cannot be removed or changed.
- **On the Phone to Available** triggers when an operator terminates a call.
- **Available to Not Available** triggers when the user changes to a state specified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

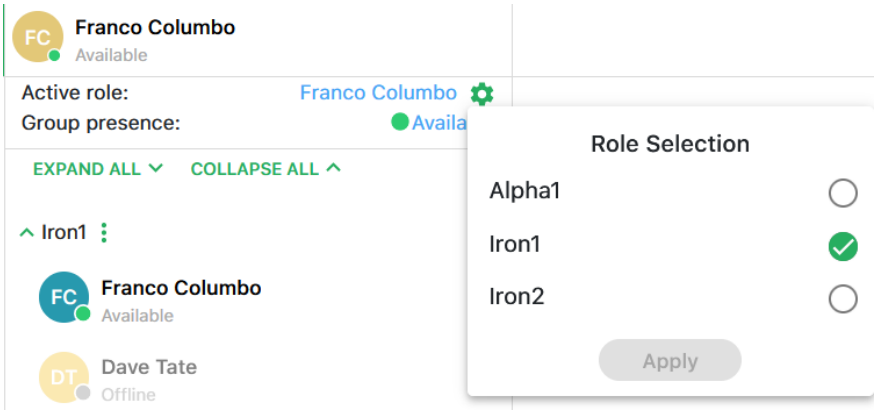
- **Available to Active** triggers when an ACD agent initiates or accepts a call. This rule cannot be removed or changed.
- **Active to Wrap up** triggers when an agent terminates a call.
- **Wrap up to Available** triggers after remaining in the wrap up state for a period specified by the ACD and Operator 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 WebZAC. Click each desired role you want to select for login:

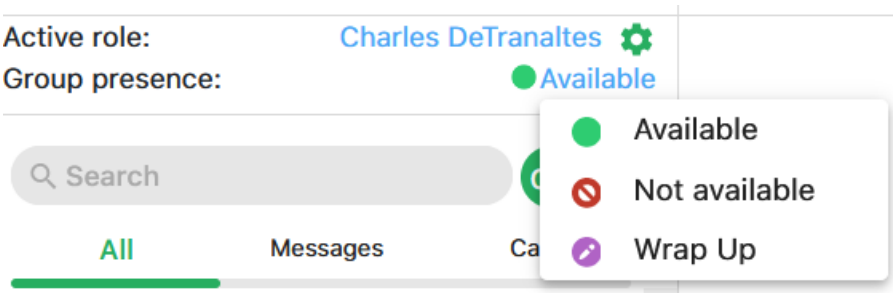


Click the “Apply for future login” to have role selection performed automatically at each login.

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



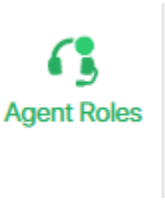
You can change your Group presence by selecting the desired presence state from the list by clicking the current group presence state:



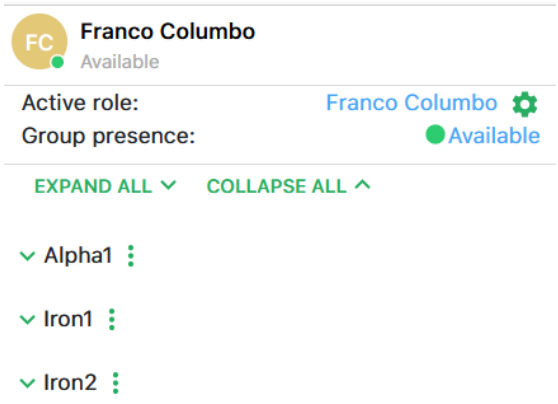
The presence state will change after selecting a presence.

5.2.1 Agent Roles

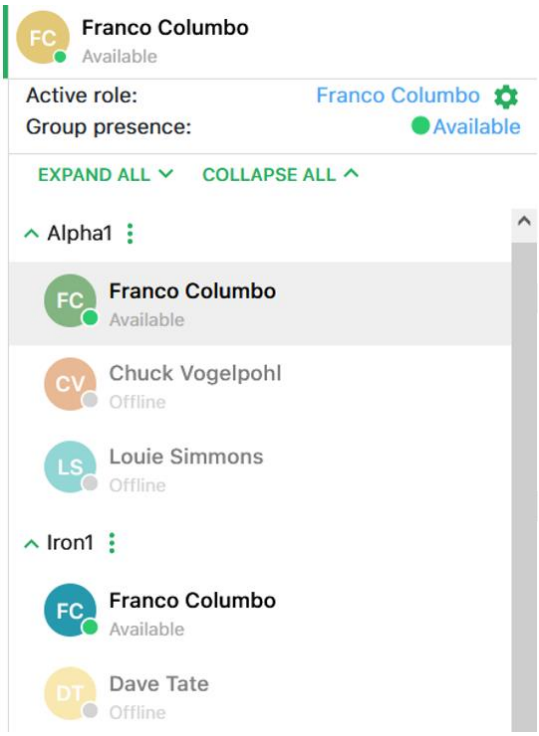
You may display the presence state of other Agents in the Call group. After selecting all desired Roles, each group you selected for a Role will display. You may expand or collapse each group to view the agent status of each by selecting the Agent Roles area:



Collapsed:



Expanded:

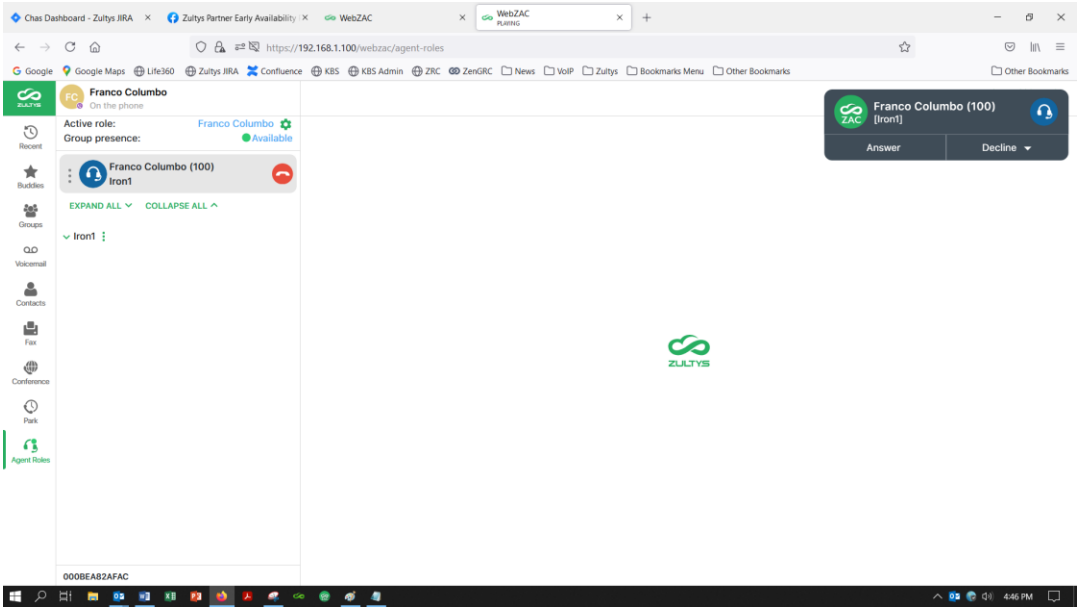


You may use Expand or Collapse all to view all agents for all groups.

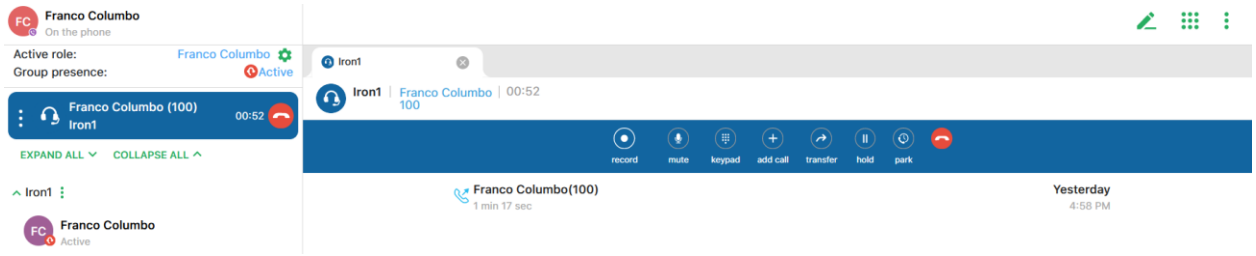
Please note blue stars indicate that member is a supervisor of that ICC call group. The star will indicate dark blue when the supervisor is logged in and light blue when the supervisor is logged out.

5.2.2 Incoming calls

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.



Group call:



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

5.2.3 Outgoing calls

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

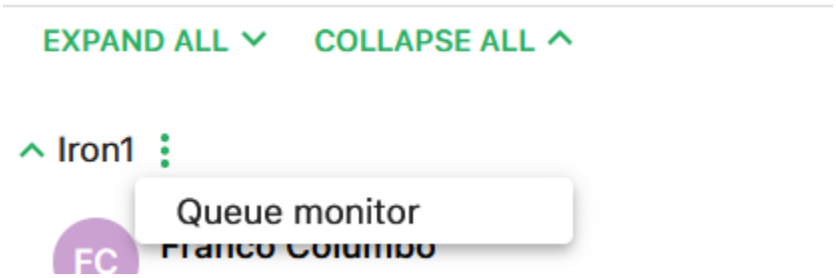
- Click on the displayed Active Role
- Check the desired role to make it active
- Place the outbound call.

5.2.4 Queue Monitor

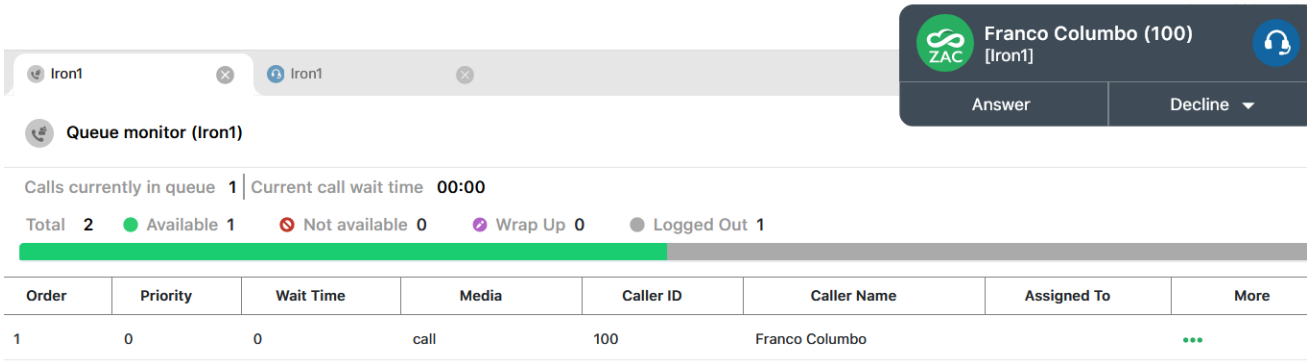
Queue monitor allows agents in the group to view the current calls that are in queue for the group.

Click the icon next to the group name.

Click Queue monitor.



The Queue monitor screen for the group will display in the tab.



The queue monitor will display the number of calls currently in queue and the current wait time at the top of the screen.

The next line items provide information on agent status of the group. The total number of agents in the group, number available, number unavailable, number in wrap mode and number that are logged out.

The fields in the Queue monitor are defined as:

Priority – The priority associated with the queued call.

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

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

CallerID – The callerID associated with the inbound caller.

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

Assigned to – The agent that will handle the call.

More – CAD information is displayed here.

6 Guest External Link User capabilities

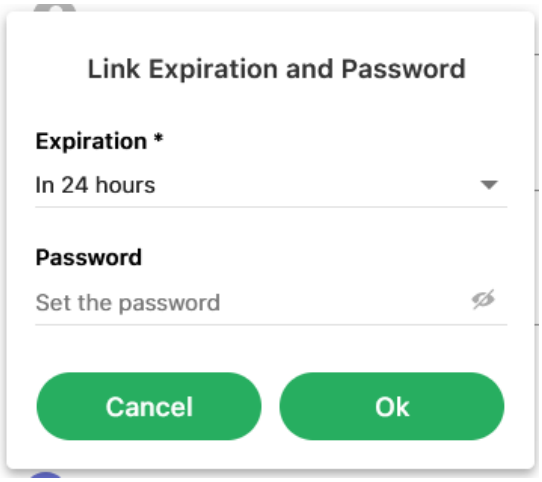
6.1 Description

This feature allows guest user profiles to be created in the MX system and assigned to individual user profiles. When a user extends a link to an external party, the external party is presented various capabilities based on the guest profile.
This feature can be utilized by individual users as well as Group Chat owners.

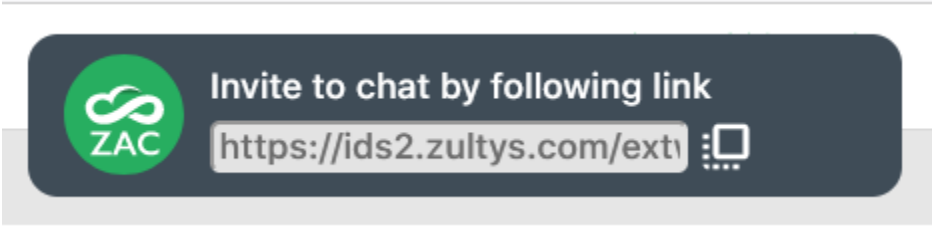
6.2 Operation

- Click the invite to chat by following link icon in My Info or in the Info field of a group chat.

- Enter the desired link expiration time and set a password if desired.

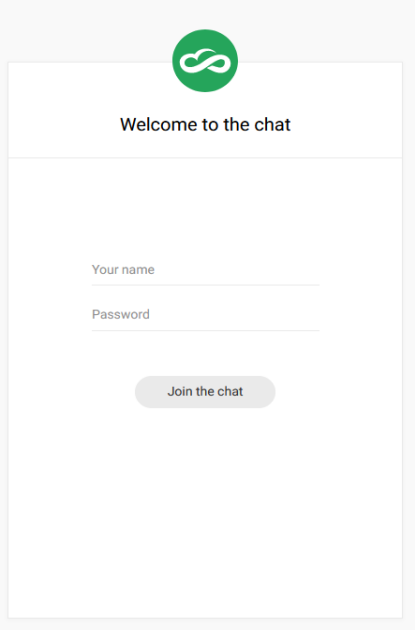


- Click OK

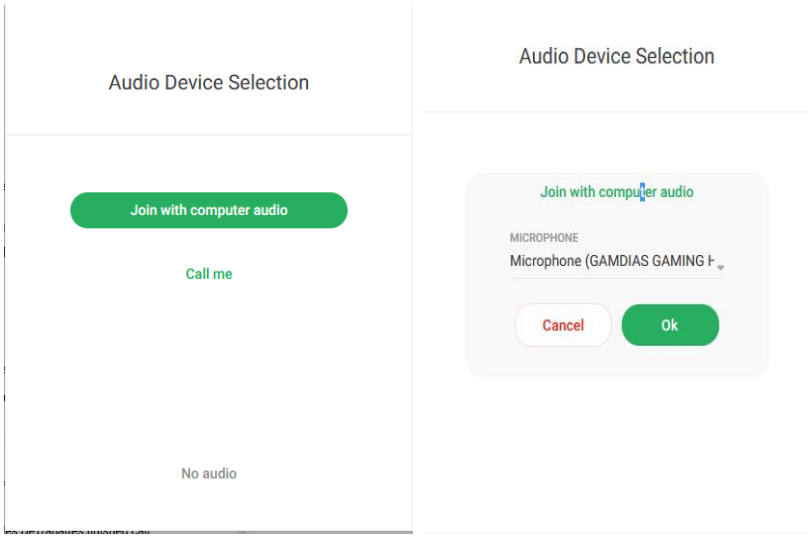


- Click copy to the clipboard and send the link to the external party.

- Once the user clicks on the link, they are directed to the external client login screen.
- Enter a name and password (if set) to join the group:



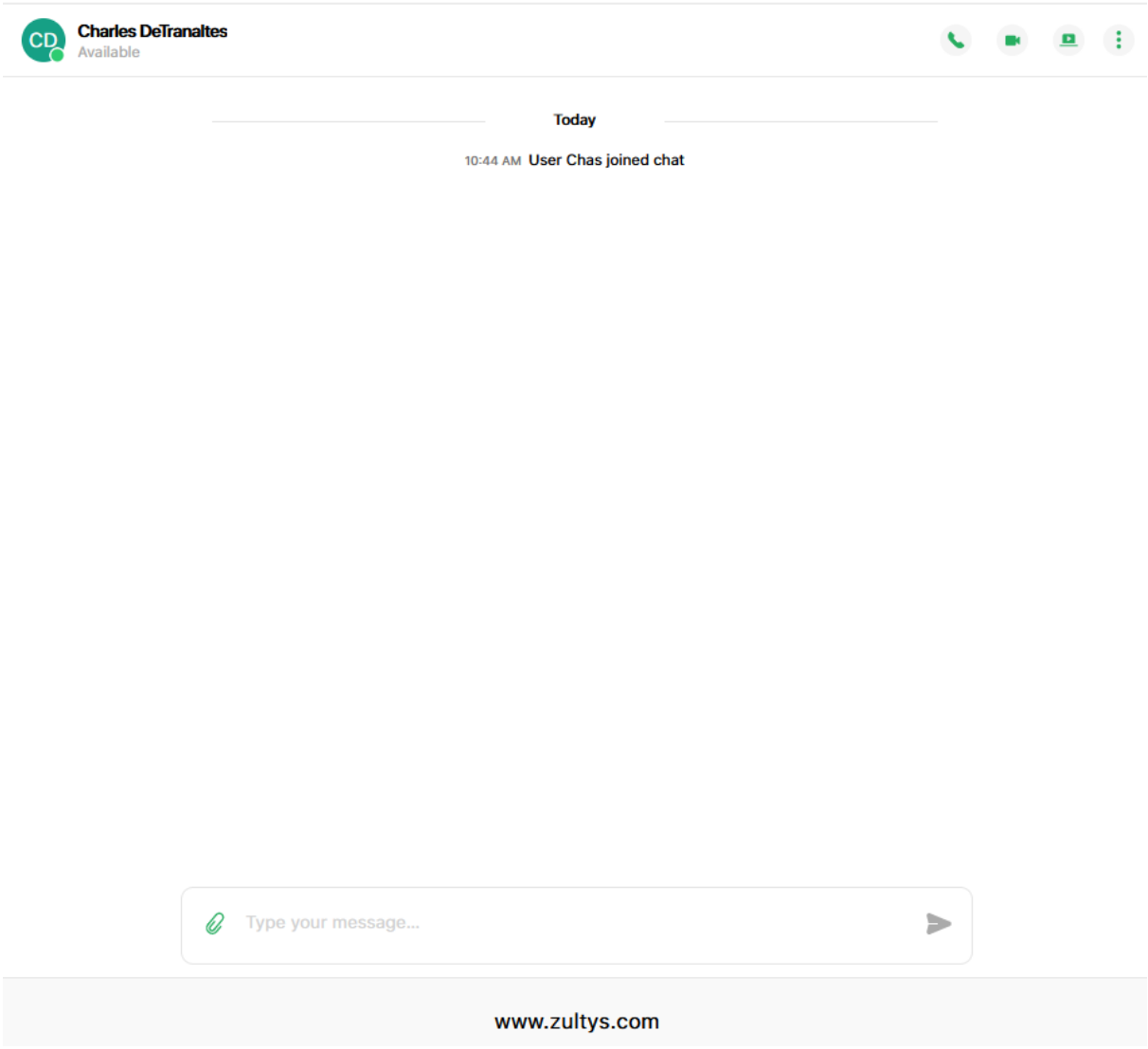
They enter their name, password (if configured) and click Join the chat.



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

- Click OK

- Main screen for the external user after a successful login:



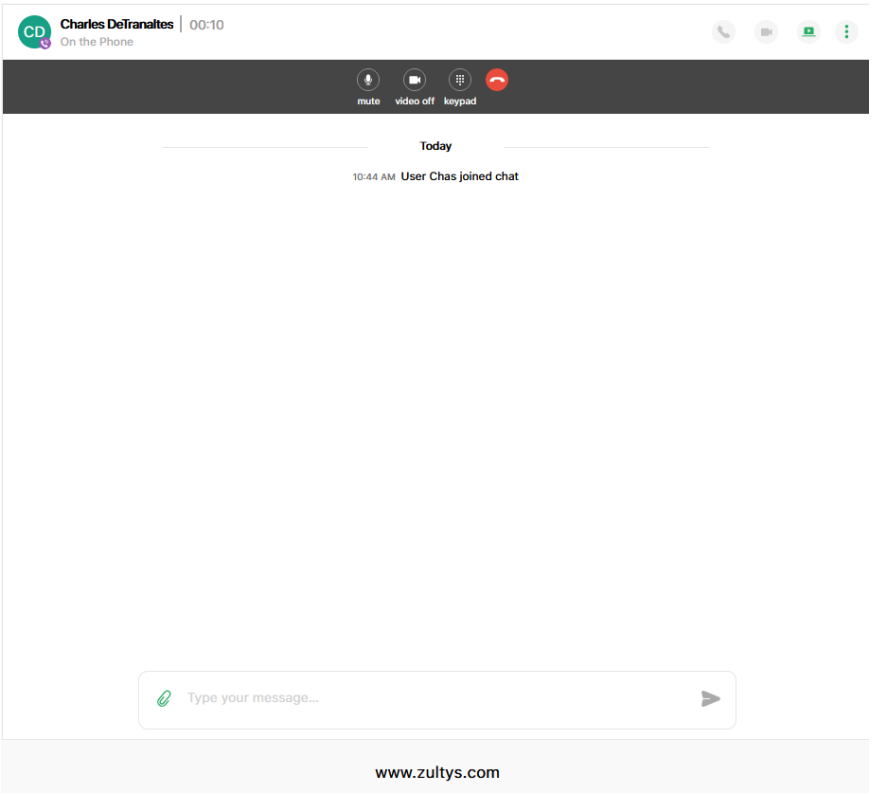
The icons in the upper right corner are displayed/hidden based on the guest profile configuration settings. If for example calling is disabled in the guest profile, no call icon is presented to the external user.

The upper left displays the host name and presence status of the host.

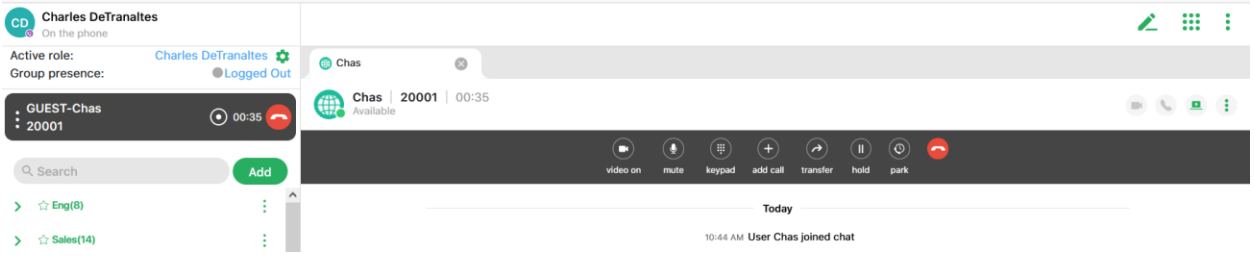
6.2.1 Calls

The external user may place a call to the host by clicking the call icon: .
The host may also call the external party as well.

When the host answers, the external client screen reflects the active call screen:



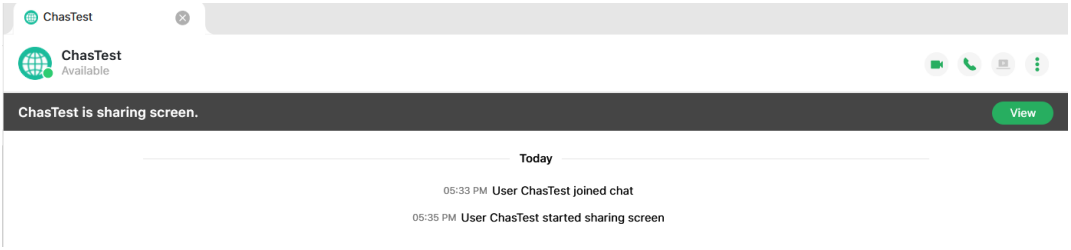
The WebZAC user screen reflects the connected call with the guest:



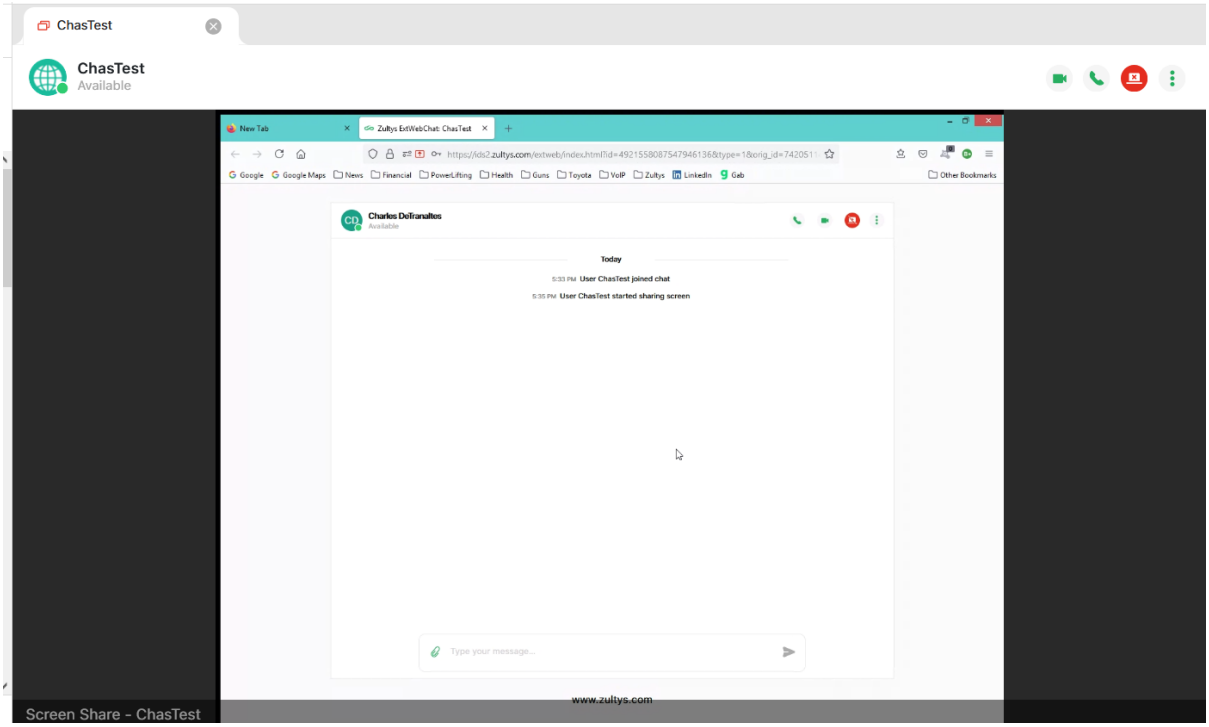
The upper left displays the host name and presence status of the guest.

6.2.2 Screen Share

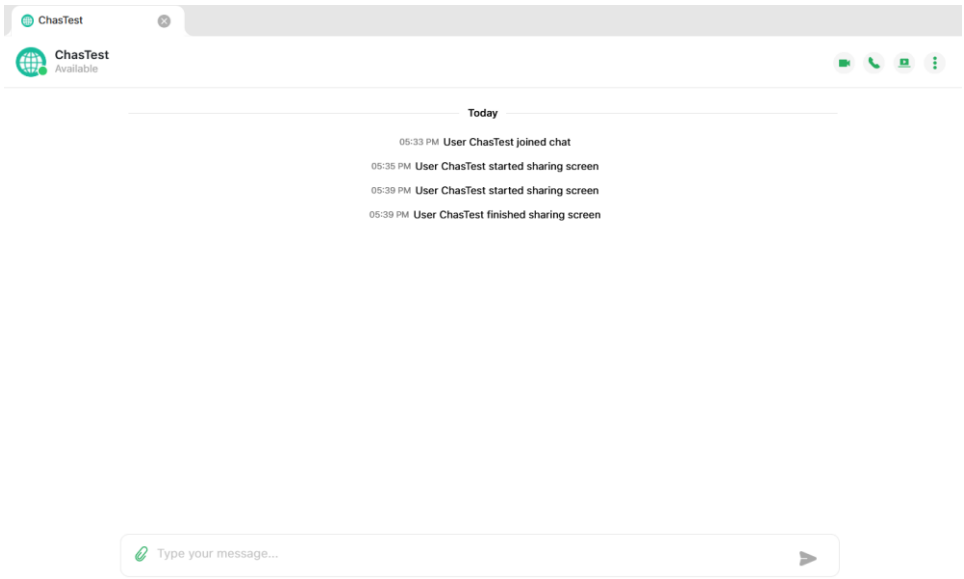
If the external users selects the share screen option, the host will receive a notification and may click View to view the external parties screen:



Host view of external party screen share:



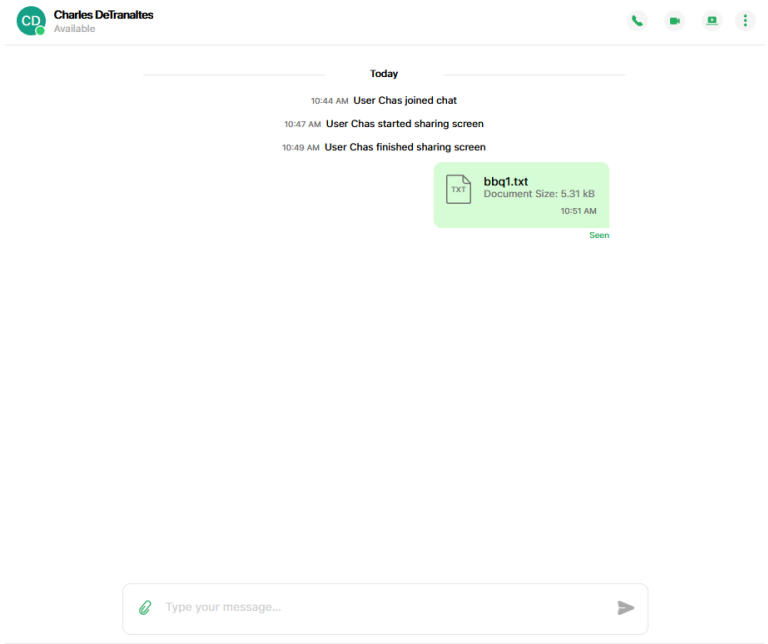
- A message is displayed when the external user finishes sharing their screen:



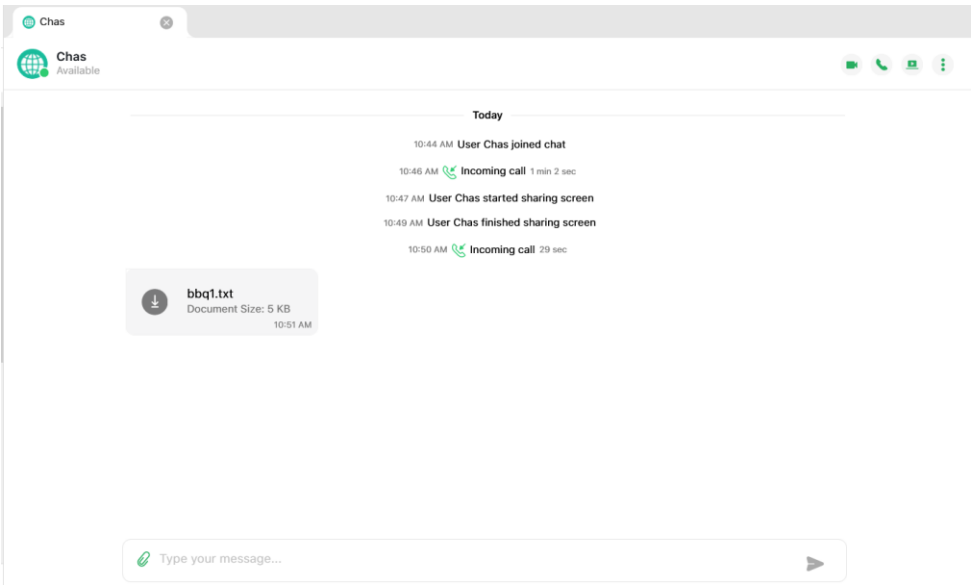
6.2.3 File transfer

A host may send/receive files to/from an external user.

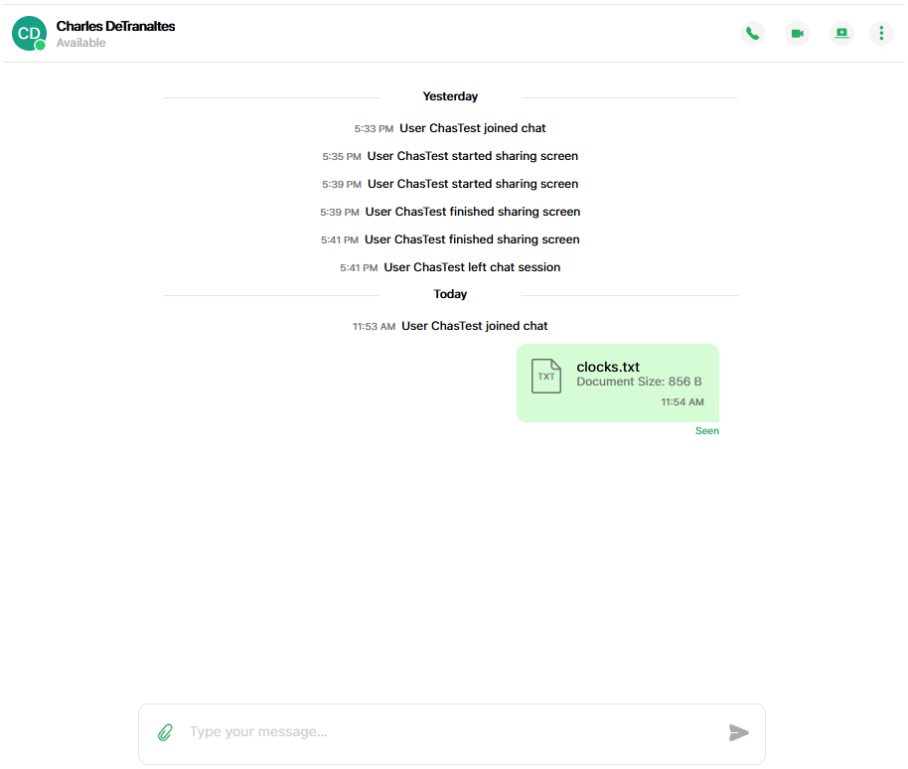
- Click the paperclip icon in the chat bar.
- Navigate to the desired file to send and select.
- Click the send icon in the chat bar.



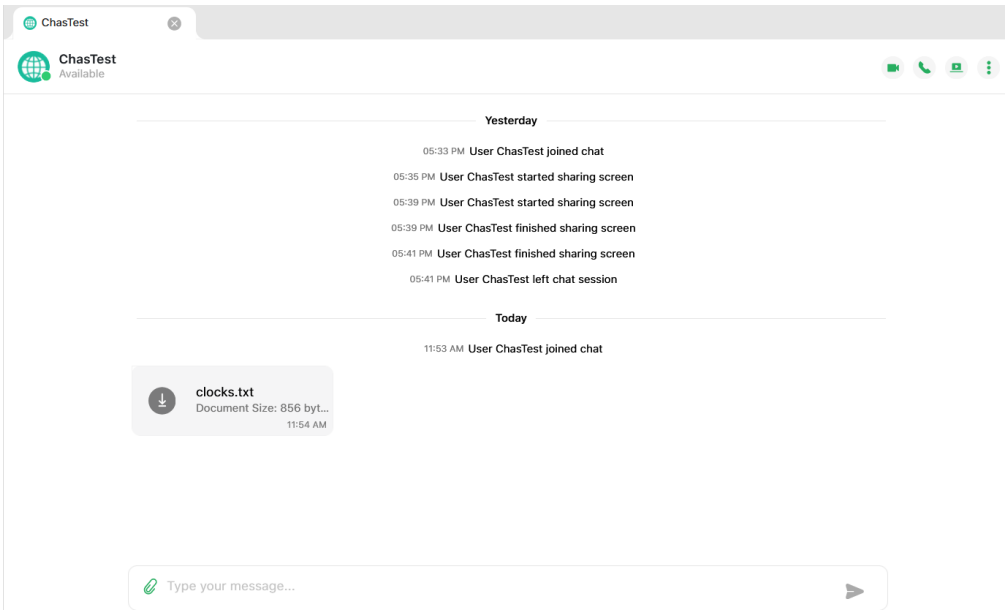
- The external user will see the file and may click on it to open:



- External user sending a file to the host:

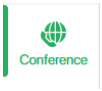


- Host receiving a file from an external user:


ChasTest
ChasTest
Available
Yesterday
05:33 PM User ChasTest joined chat
05:35 PM User ChasTest started sharing screen
05:39 PM User ChasTest started sharing screen
05:39 PM User ChasTest finished sharing screen
05:41 PM User ChasTest finished sharing screen
05:41 PM User ChasTest left chat session
Today
11:53 AM User ChasTest joined chat
clocks.txt
Document Size: 856 byt...
11:54 AM
Type your message...

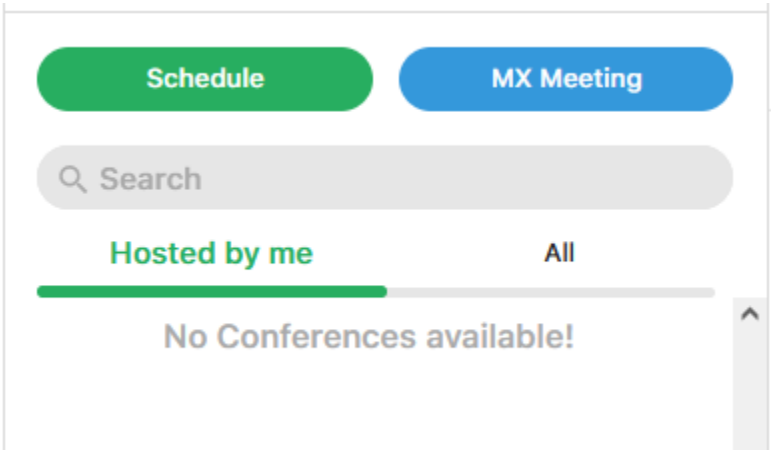
7 Conference

This allows you to create and schedule conferences.

- Click the Conference icon on the menu bar 

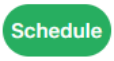
- The Conference screen will display:

The main screen will display a list of all active and scheduled conferences as well as the Schedule button. The conferences are filtered hosted by the user or all.

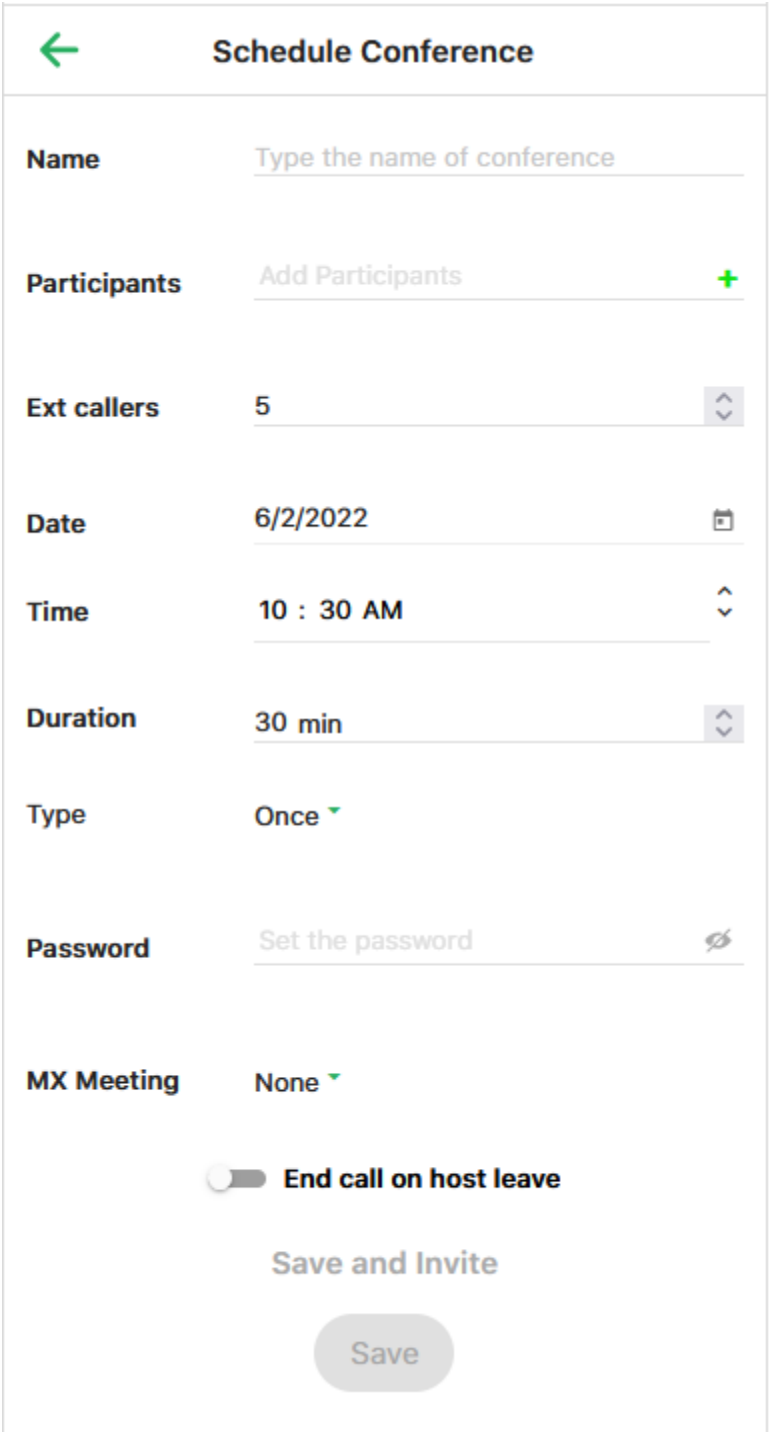


7.1.1 Schedule

You may create a conference and then schedule this for a future date. Configurable options for date/time, duration, number of callers, password, type may be configured in this area.

- Click the schedule icon in the conference area 

The schedule conference screen will be presented:



Name – Ener the desired name for the conference. (example: Weekly Sales Call")

Participants – Choose the internal (MX users) participants you want to invite to the conference from the list. *Note: Participants will be notified via ZAC or*

WebZAC of the conference. They click the Join option to enter the conference when it starts.

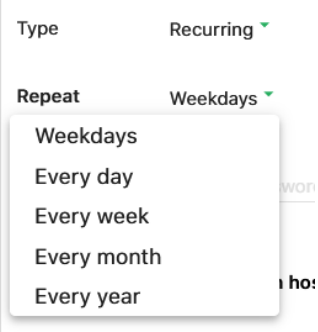
Ext callers – Enter the number of external callers you are inviting to join the conference.

Date – Allows the selection of the desired date for the conference.

Time – Allows the selection of the desired start time for the conference.

Duration – Configures the maximum duration of the conference.

Type – Allows the selection of a one time or reoccurring type conference from the drop down.
If reoccurring, configure the desired frequency of the conference from the drop down list.



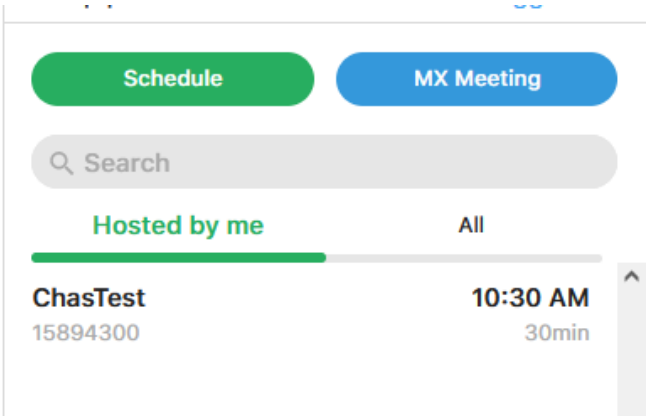
Password – Allows the configuration of an optional password that participants must enter to join the conference. This is optional and a blank filed indicates no password is required to join the conference.

End call when host leaves – Enable this setting if the conference is to end when the host leaves.

Save and Invite – This will save the conference and generate an e-mail invitation with the conference information. The user can then e-mail the conference information to participants.

Save – Saves the conference without generating an e-mail invitation.

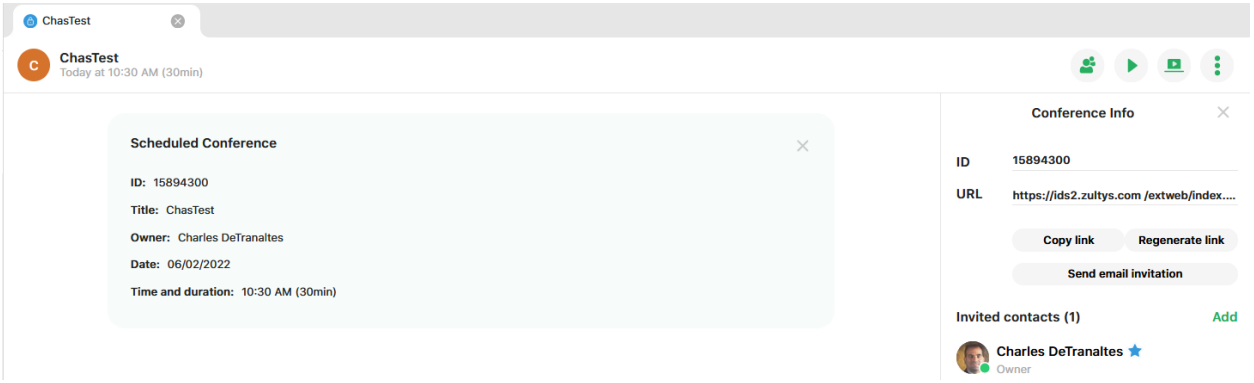
The conference will appear in the conference list:



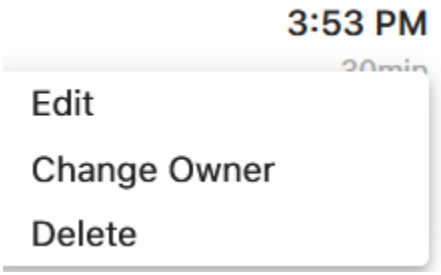
7.1.2 Viewing, Editing, Starting

Once a conference is created, the user may view, edit, delete, or start the conference.

- Click the desired conference from the list, the conference window will appear. This allows you to view basic information regarding the conference
  The upper left portion of the conference tab displays the conference name, date/time, duration, and type of conference.
  The main window displays the conference information that participants will see when they join the conference.



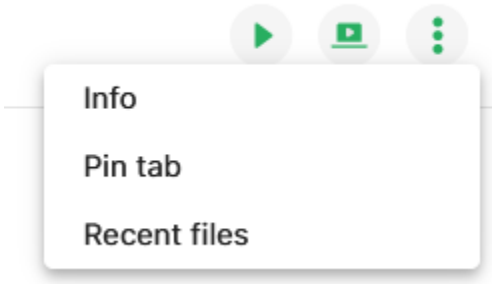
You may also click the options icon in the conference list to display the more options menu:



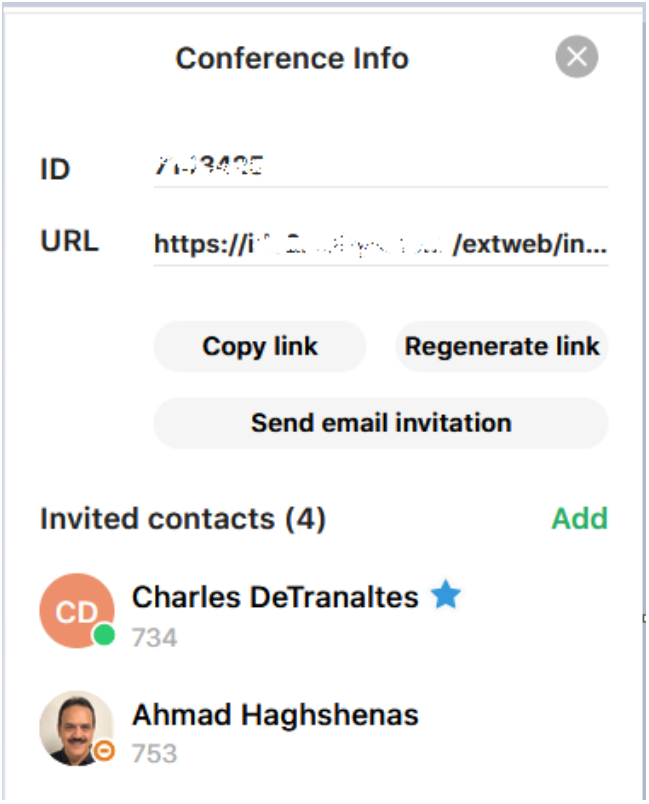
The upper right portion of the conference tab provides controls for starting the conference, screen share when in the conference, and a menu option that provides edit/delete, pin, and file information functions.

7.1.3 Edit/Delete

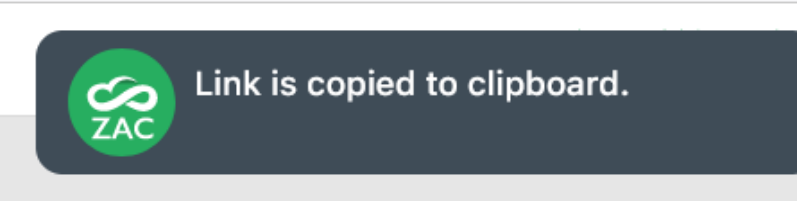
- Select the option drop down.
- Click Info



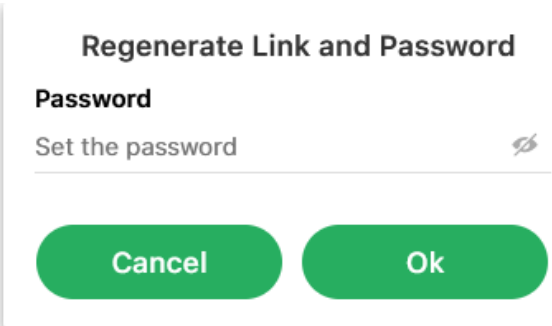
The Conference Information screen will display:



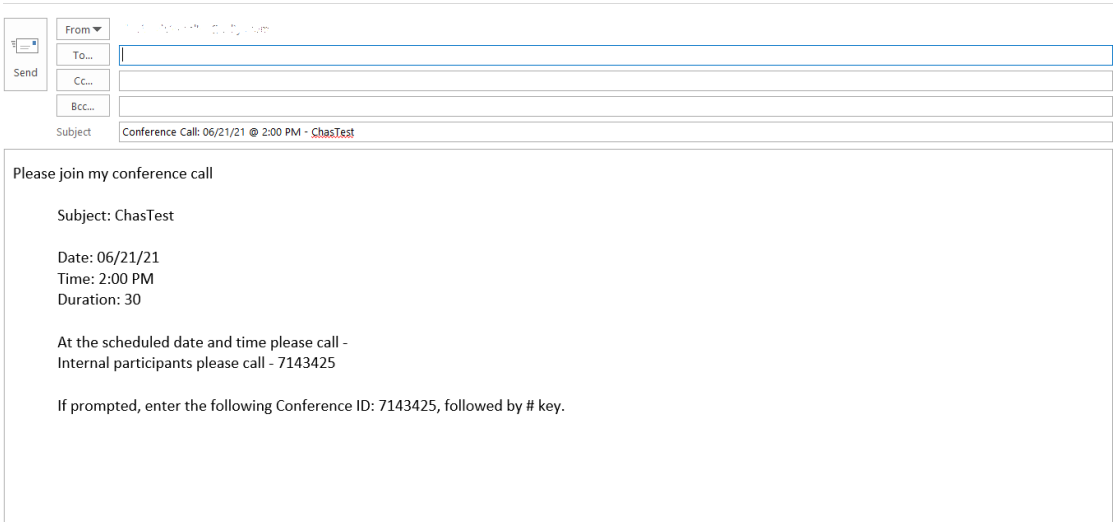
Copy link– This will create a guest external link that external parties utilize to join the conference.



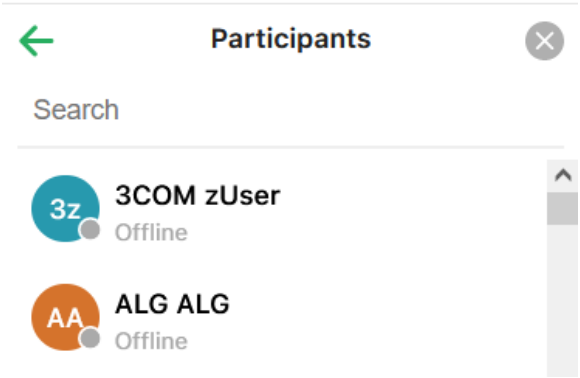
Regenerate link – Allows the host to regenerate the link and password for the conference.



Send e-mail invitation – This generates an e-mail in Outlook with the conference information in the e-mail body. You may paste the external link into the invitation e-mail for external parties.



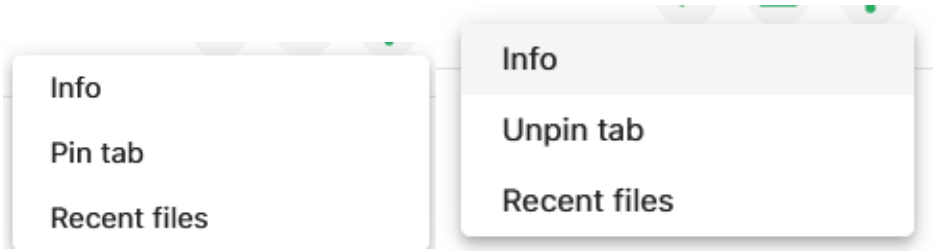
- Click Add to add participants. Select the desired participants from the list.:



7.1.4 Pin/unpin

This feature allows you to pin the tab so that it is not removed when other tabs open. The user may return to the tab by clicking on it.

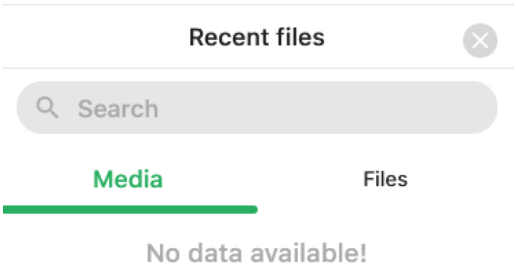
- Select the Pin option to pin the tab and the unpin option to unpin the tab.



7.1.5 Recent Files

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

- Click Recent files

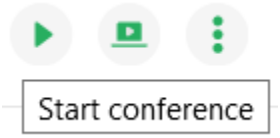


A list of all shared files will appear. You may select to view either Media or Files.

7.1.6 Start

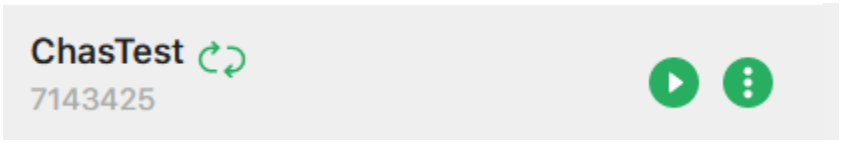
This is the button that will initiate the conference.

- Click the Start Conference icon

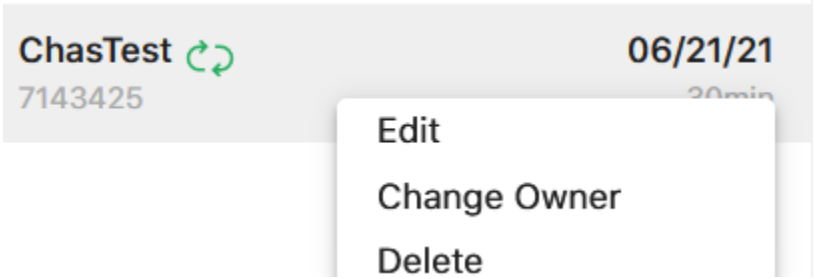


7.1.7 Conference options

Move the mouse over the desired conference in the list and select the option icon.



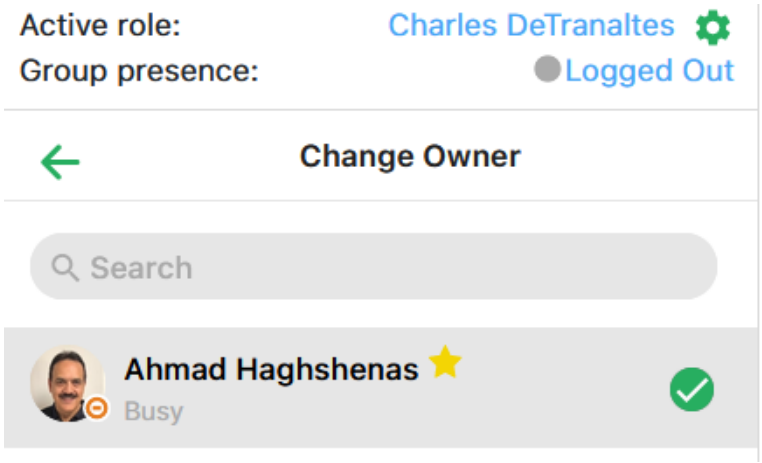
The option menu displays Edit, Change Owner, and Delete options.



Edit – Displays the Edit screen. You may edit any of the settings that were previously configured.

Change Owner – Allows you to select a different internal participant to be the owner of the conference.

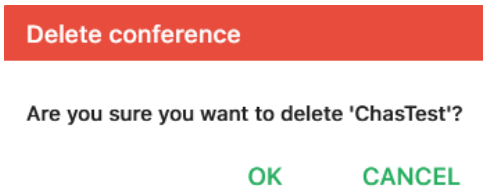
- Click the Change Owner item.
- When the desired owner is highlighted, click to select the new owner.



- Click Change Owner to complete.

Delete – Deletes the selected conference in the list. A delete confirmation dialog is presented.

- Click OK to delete or cancel.



8 Release 17 Maintenance Features

This section describes the new features that are introduced with MX version 17.0.10 or higher.

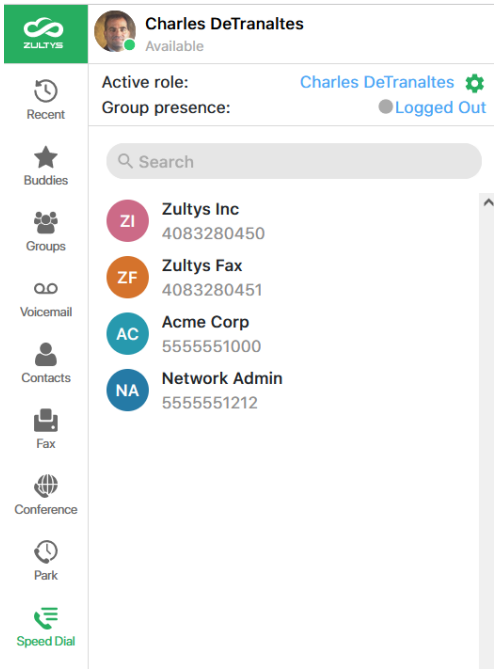
8.1 Speed Dial

8.1.1 Description

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

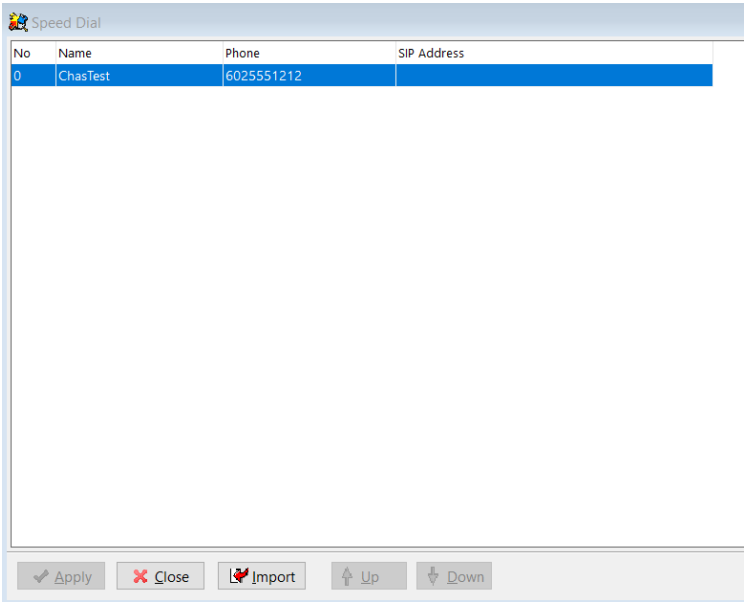
8.1.2 Operation

- Click the Speed Dial icon in the left menu bar:
- Select the desired contact/number and click the call icon:



8.1.3 Conditions

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


Speed Dial
No
Name
Phone
SIP Address
0
ChasTest
6025551212
Apply
Close
Import
Up
Down

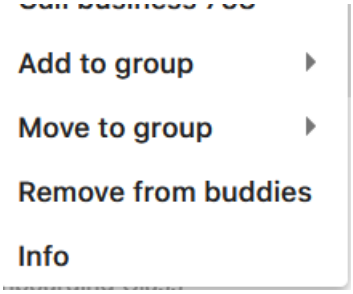
8.2 Change another user's presence

8.2.1 Description

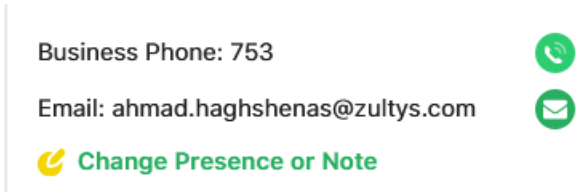
This feature provides a method for a user with administrative privileges to change (or reset) another user's presence or their presence note. This is useful if another user is not able do this now or forgot to do this earlier by themselves.

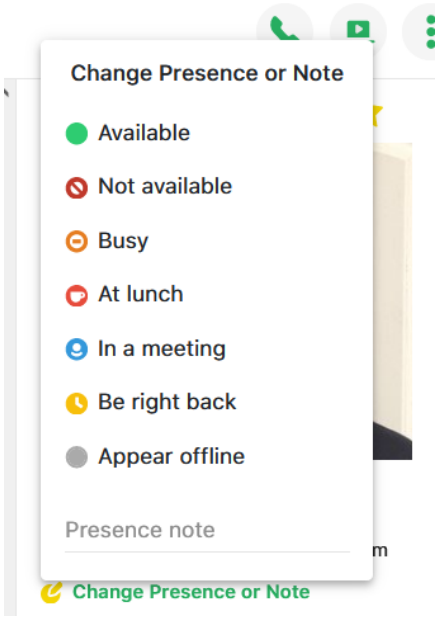
8.2.2 Operation

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



- Click the Change Presence or Note option. Select the desired presence and/or note for the user.





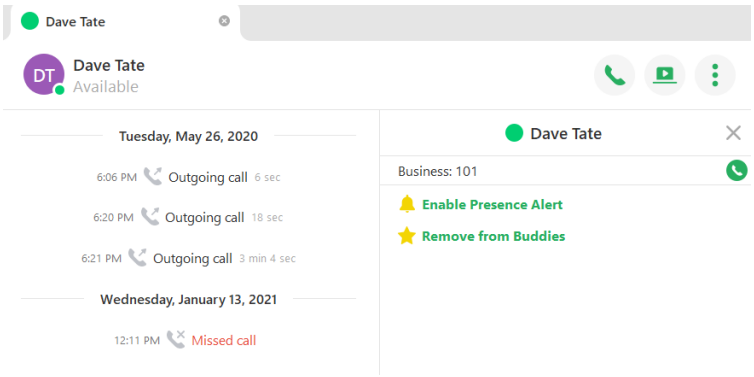
- The user's presence and note are updated.

Conditions

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

  ☑ Can set presence / presence note of other users

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



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

- A user may change the presence note of a logged out WebZAC user. This can be utilized for cases where user's may fail to remove their note.

8.3 User Profile Settings

8.3.1 Description

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

8.3.2 Operation:

MX Administrator>Users>Profiles

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

General tab:

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

  Enable IM *(please note conditions)*

  Enable video

  Can change presence/presence note of others

- Can return calls from voice mail

Client tab:

- Manage multiple calls via

Misc tab:

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

8.3.3 Conditions

- Disabling IM prevents normal operation of IM and file exchanges for Webchat agents. User profiles configured for WebChat agents should always have IM enabled.

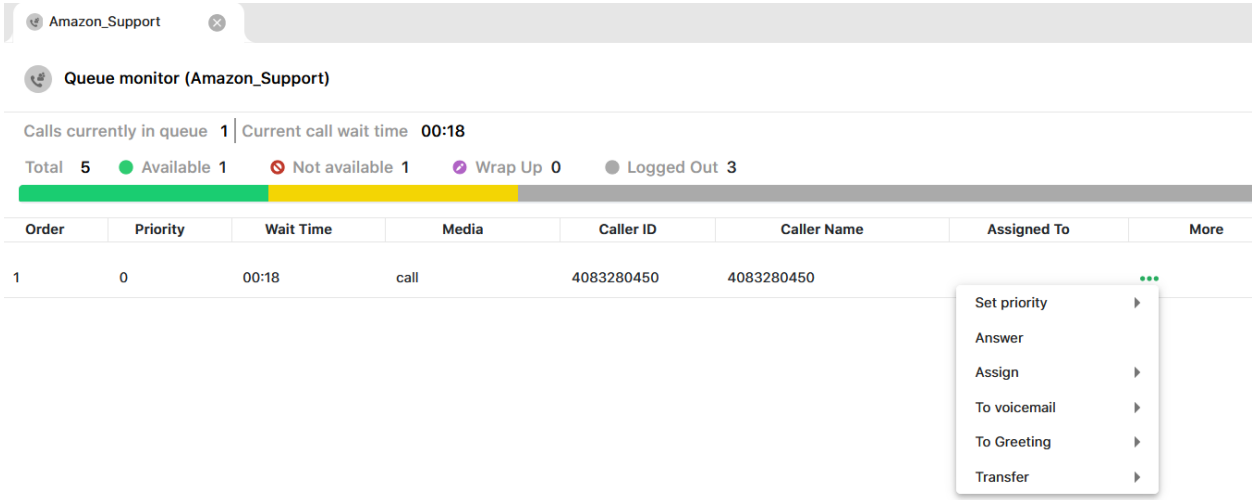
8.4 Queue Monitor Supervisor Commands

8.4.1 Description

This feature allows a Supervisor of an ICC group to utilize capabilities of managing calls-in-queue actions directly from the Queue Monitor screen.

8.4.2 Operation

- Select call-in-queue
- Select the more icon to display the options.
- Select the action



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

- Set Priority

- Disconnect

8.4.3 Conditions

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

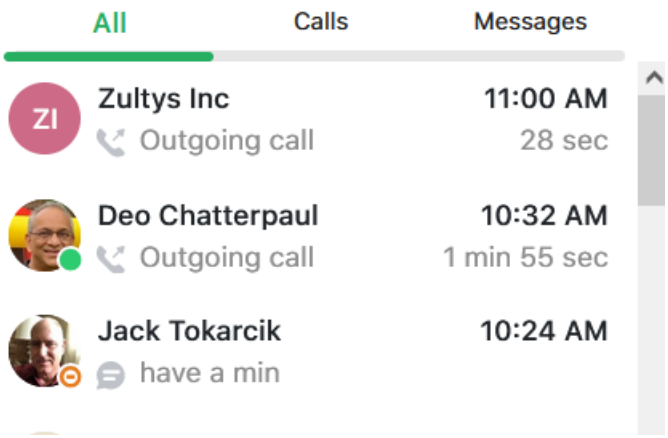
8.5 Recent Screen Improvements

8.5.1 Description

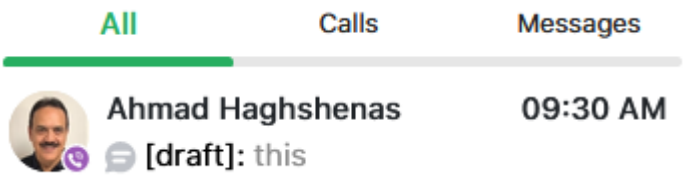
The Recent screen has been improved to include Avatars, user presence, user typing information and draft functions.

8.5.2 Operation

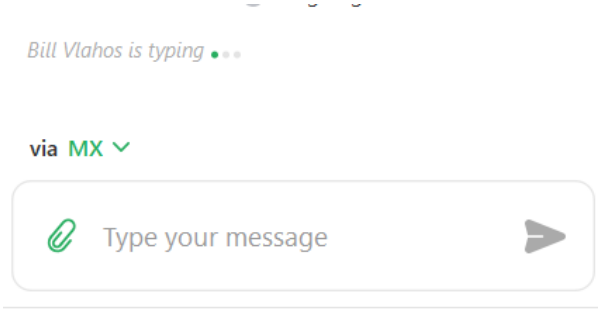
Avatars and presence in the Recent list:



Draft status displayed in a chat:



User typing indication in a chat:



8.5.3 Conditions

- If there is a draft for a particular chat, the draft chat will appear at the top of the Recent list.

- Draft content is maintained on a WebZAC re-login.

8.7 Conference Accept/Reject Status

8.7.1 Description

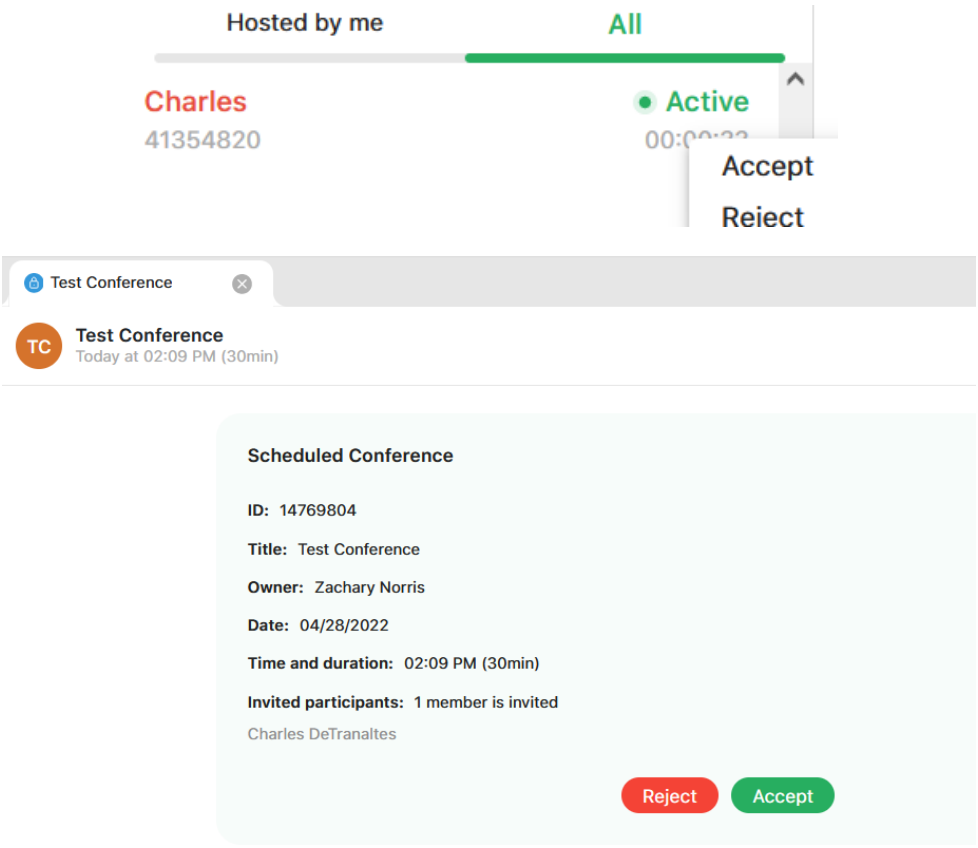
This feature provides a method for conference participants to accept or reject a conference invitation.

8.7.2 Operation

Conference Participants:

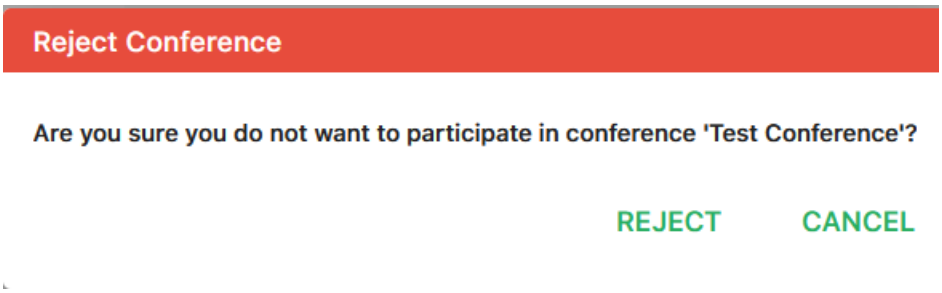
Internal participants who receive a conference invitation may click on the invitation to display the conference information.

The participant may select to Accept or Reject the conference invitation. This can be done form the conference list or clicking on the conference to open the Conference tab:



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

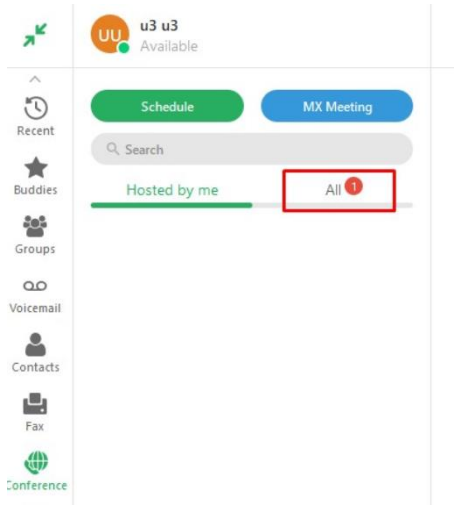
If the participant rejects the invitation, they will be prompted with a confirmation dialog:



Clicking Reject will delete the invitation and no calendar invite is added. The user will not receive any notification prior to the conference start time.

8.7.3 Conditions

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



8.8 Search Functions

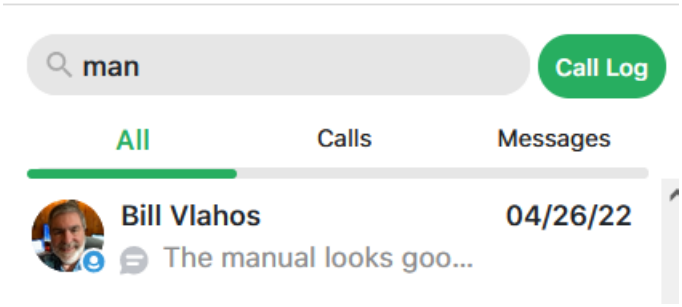
8.8.1 Description

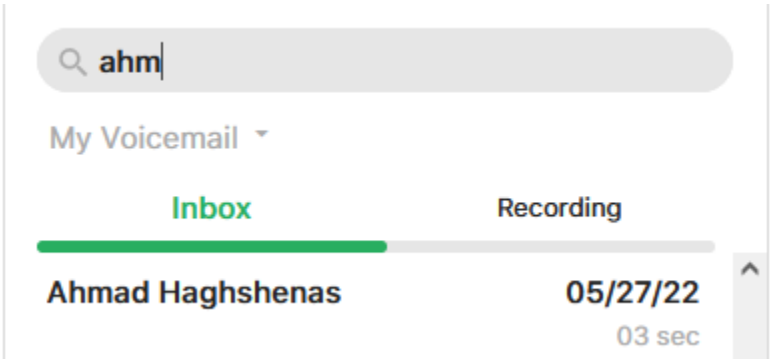
New search functionality has been added in multiple areas of WebZAC. This will allow users to locate information by performing a search function.
The search function is added to the Recent, Voicemail and Fax menu areas.

8.8.2 Operation

Recent>All, Calls or Messages

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



Voicemail>Inbox

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