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Zultys Mobile Communicator for iPhone 8.0

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This document covers basic use of the Zultys Mobile Communicator for iPhone application. The Zultys Mobile™ application extends many powerful features to iPhone device that increase productivity, enhance customer service and reduce costs. Zultys Mobile features include:

- Real-time presence status & presence notes
- Instant Messaging (IM) & IM alerts
- Visual Voice Mail
- Built-in softphone function
- Real-time call alerts & caller information
- Single number contact
- Corporate directory and extension dialing
- Address book integration
- iPhone Mail integration to email contacts directly from Zultys Mobile
- Call park, hold and transfer
- Least cost routing
- Call logs and history
- Caller privacy
- Support for up to four simultaneous call sessions

1   Contents

2 Requirements

The following requirements must be met in order to deploy the Zultys Mobile Communicator for iPhone (hereinafter referred to as Zultys Mobile) application:

- iPhone running iOS version 9.0 or later. iOS CallKit related functionality requires iOS 10.0 or later.
- MX system must be running firmware release 12.0.7 or later with any relevant patches installed. **Earlier MX releases are not supported.** To use the option to start a conference call from a Group Chat, MX Release 14.0.4 is required.
- 3G or LTE network (for external use).
- Valid MX user account with "Mobile Access" enabled.
- A Zultys "Mobile Access" License for each mobile user.
- Digital Security Certificate installed on MX.

- Port 7778 open and forwarded to the MX.
- Appropriate SIP and RTP ports forwarded to the MX if using softphone from an external network.
- MX system must be able to access mxps1.zultys.com:7788 and mxps2.zultys.com:7788 for push notification related functionality to operate.

3 New Features in Zultys Mobile Communicator for iPhone version 8.0

- Call Recording functionality is now available.
- Conference calling has been integrated into Group Chat functionality. When members of a group need to get together to discuss issues on a phone call, they can initiate a conference call right from the Group Chat screen of Zultys Mobile. With a single button, any member of the team can start a conference call and other members can freely jump on and off the call at their convenience.

4 Obtaining Zultys Mobile Communicator for iPhone

Zultys Mobile is available via the App Store as a free download. To install:

1. Open iTunes App Store.

2. Search for "Zultys Mobile".

3. Tap on "Free App" to download.

You need to purchase Zultys Licensing prior to activation:

Zultys Mobile Communicator for iPhone part number 90-82002

5 Launching the Application

To start Zultys Mobile, tap on the Zultys Mobile icon on the iPhone's home page.
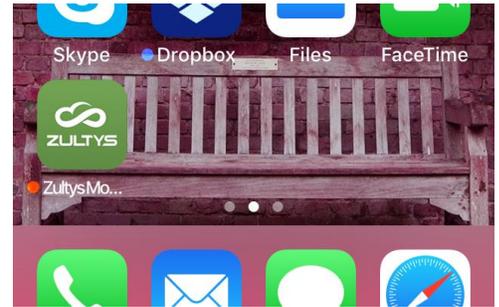
6 To Login/Logout

6.1 To login to Zultys Mobile

To login to Zultys Mobile, type in the required information and tap the Login icon.

- **Username** – Type your MXIE username.
- **Password** – Type your MXIE password.
- **Server address** – Type the FQDN or IP address of your MX.
- **Bound Phone** – Your cell/mobile phone number.
- **Save password** – If enabled, Zultys Mobile remembers your password.

Note: If the User account is configured for LDAP authentication, Zultys Mobile access will be authenticated to AD/LDAP database.
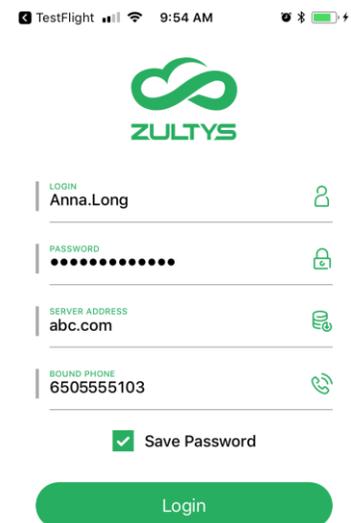
If you are a member of at least one Call Group, Operator Group or Hunt Group, you will be prompted to login as the Agent for this Group at this time.

This option will be available only if the Enable Agent Roles option is active in application settings. See section 14.2 for more information.
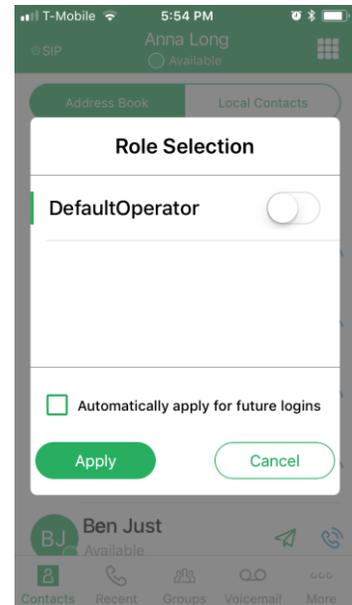
6.2 To Logout

Tap the More options icon on the bottom right of the screen.

Select Setting from the list of options.
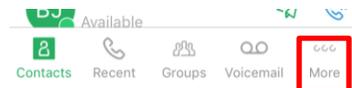
In the Settings screen, select Log Out at the bottom.

NOTE: You must logout of the application in order to stop receiving notifications. Closing the application via the iOS will not stop the application from receiving notifications and launching.
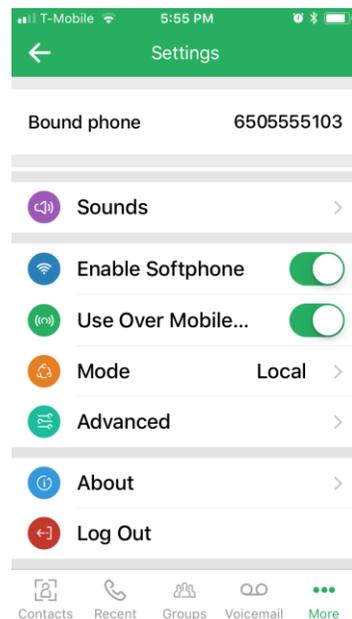
7 Navigating the Application

When Zultys Mobile is launched, the Contacts screen will display. The bottom portion of the application contains the menu items to access each area of Zultys Mobile.
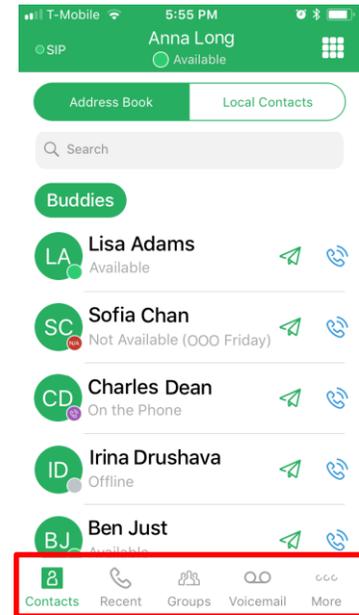
Notifications will appear in this area when activity has occurred.

You can tap the More button on the bottom right access more menu items.

8 Presence and Active Roles

Your Presence state information is displayed at the top of the application. To change it:

1. Tap the presence section to change the presence state.

2. Select the desires presence.
3. You may also type a presence note to be associated with your presence state.
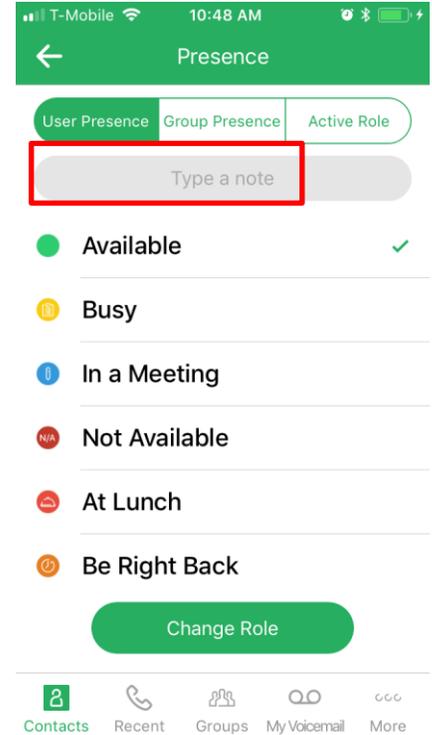
8.1 Logging In and Out of a Call Group, Hunt Group, or Operator Group

If you are an agent of a Call Group, Hunt Group, or an Operator Group, you can log into an Agent Role from the Presence screen.

This option will be available only if the Enable Agent Roles option is active in application settings.

Tap the Change Role button at the bottom of the presence screen.
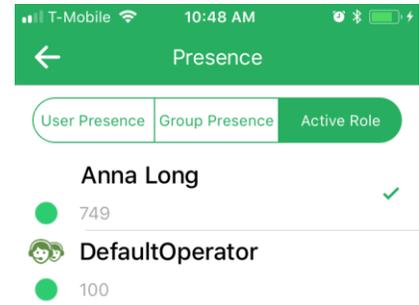
A pop up with list of Call Groups appears.

To log into a Call Group, slide the icon to the right.

To log out from a Call Group, slide the icon to the left.

Checkmark Automatically Apply for Future Logins if you want the application to remember this setting next time you log into Zultys Mobile.

Click Apply to confirm
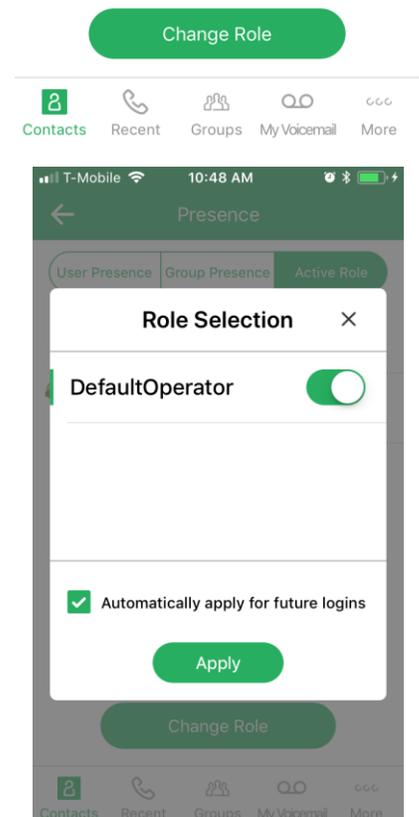
8.2 Changing Agent Presence

If you are currently logged into a Call Group or an Operator Group, you can select your Agent Presence as well as User Presence.

This option is available only if the Enable Agent Roles option is active in application settings.

Tap the Group Presence area to open the drop-down list and select an Agent Presence state.
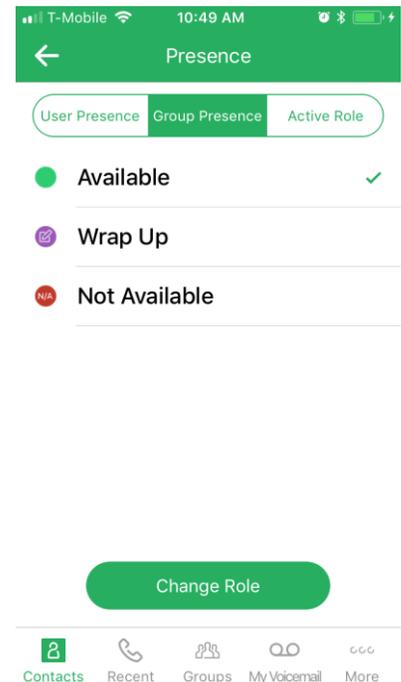
8.3 Changing Active Roles

Your current Active role is displayed in the Presence area at the top of the screen. By default, when first logging into the application, you are logged in as your User role.

If you are currently logged into a Call Group, Hunt Group or an Operator Group, you can select the Active role to make outbound calls from.

This option is available only if the Enable Agent Roles option is active in application settings. See section 14.2 for more information.

To change the Active role for making outbound calls, tap on the Active Role.

Tap the Role you need. A checkmark appears next to the currently active role.
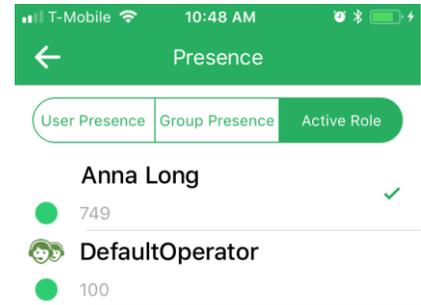
Your new Active role is displayed in the Presence area at the top of the screen. When you make an outbound call, the called party sees the caller ID for your current role.
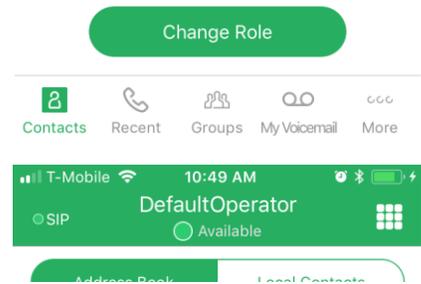
9 Managing Calls via Zultys Mobile

Zultys Mobile allows you to make and receive calls as if you were using a phone in the office.

9.1 Making calls

This function allows you to dial any number as if you were dialing from a phone in the office.

1. Tap the Dial Pad button in the top right corner of the application. Depending on which current
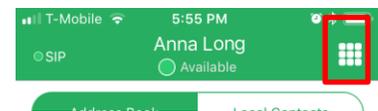
Active Role is selected, the call recipient will see the Caller ID for this role.

See Section 8.3 for instructions on how to change your Active Role.

2. In the Dial Pad screen, dial your number and tap the ![phone icon] icon to dial the number.
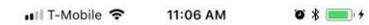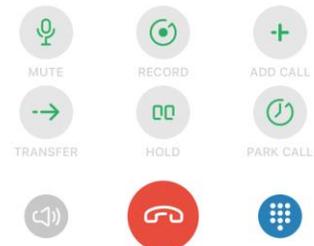
3. If using the Softphone the call will go through immediately.

See Section 9.4 for advanced call handling options available while on a softphone call.

4. If the softphone function is disabled, you will receive a call from the MX phone system to your iPhone device. You must answer the call for it to be placed / connected to the dialed number.

You can navigate away from the active call session at any time. You can browse the application during the active call and send chat messages.

To return to the call session again, tap on the blue bar at the top of the screen
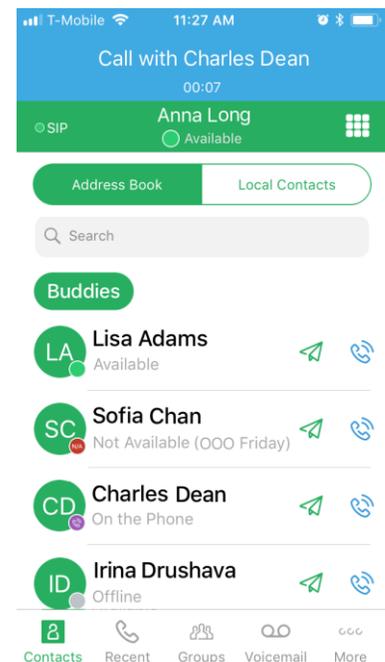
9.2 Answering Calls

Incoming calls can be answered while Zultys Mobile is in the background or while the Zultys mobile application has focus.

A popup screen appears when a call comes in showing the caller ID, as well as which User or Call Group this call is for, and allowing you to:

- Accept the call.
- Decline the call to silence the ringing.

When you choose to answer the call, if using the Softphone the call goes through immediately.

If the softphone function is disabled, the MX phone system initiates a call to your phone number.

The call from the office phone system is a normal cellular/mobile call and thus call charges may apply.

Note: The Caller ID presented with the voice call from the MX system may not be the original caller ID of the person who called you due to limitations in carrier networks etc.

From the iPhone Answer screen tapping:

- **Answer** – Answers the call.
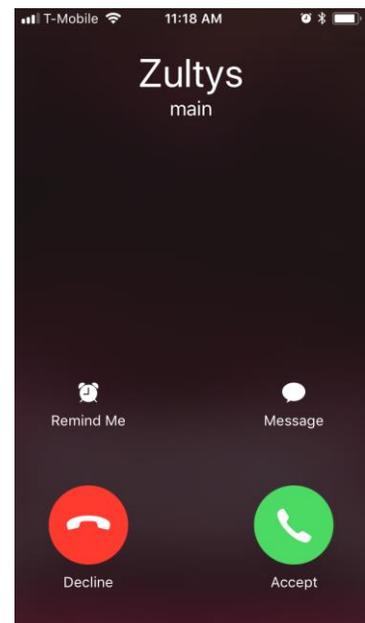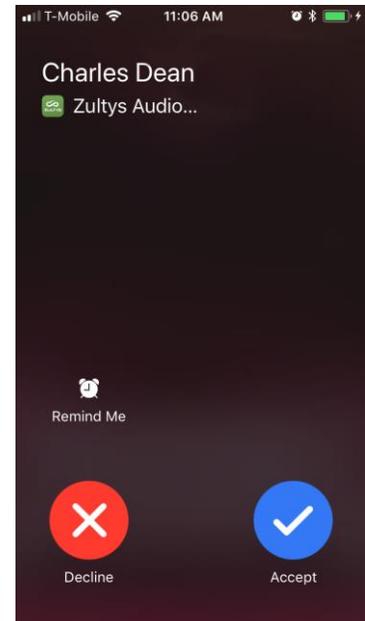
- **Decline** – Sends the caller to your iPhone's voice mail.

9.3 Multiple Call Sessions

It is possible to handle up to four simultaneous calls.

In the call session screen, the current line is highlighted in green.

To switch between call sessions, tap on a specific call session. An active call is placed on hold when you switch to another session.

To make a second outbound call, tap on the Dial Pad or navigate to Buddies or Contacts and select a contact or phone number.
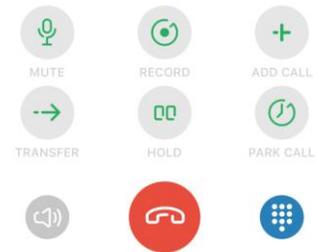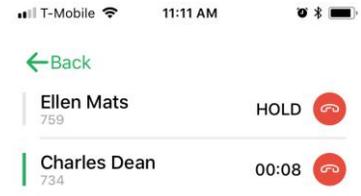
9.4 Advanced Call Handling Options

When using the softphone function, active calls can be parked, placed on hold or transferred.

To accesses these functions, you must have the active call session open.

If you previously navigated away from it, tap on the blue bar at the top of the screen
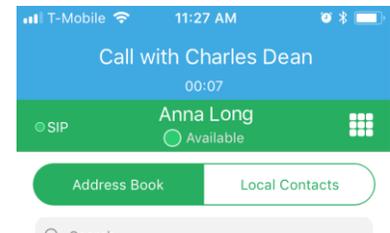
9.4.1 Call Recording

In order to access this feature, the user must have Call Recording option enabled in MX Administrator. Contact your system administrator for assistance.

To initiate a Call Recording, tap the Record button. RECORD The button will

change to green to indicate that recording is in progress. RECORD

Note that if you activate Call Recording in mid call, the entire call will be recorded.

You can disable call recording, by tapping the active Record button. Do note, doing so erases all recordings for this call.

To access a call recording after the call is disconnected, navigate to Voicemail on the bottom bar of the application. Tap on My Voicemails and select the Recording tab.
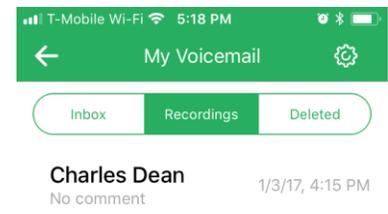
9.4.2 Hold

To place a call on hold, tap the Hold button in the call session. HOLD

A held call can be parked or transferred.

To retrieve the call, tap the Hold button again. HOLD

9.4.3 Unattended Transfer

To transfer a call, tap the Transfer button in the softphone screen. TRANSFER

Tap the name of person to transfer the call to then tap Transfer to complete the operation. You can type a name of the contact to search for them in the Contact list.

Alternatively, you can make a transfer to a buddy, another user on the MX, or a number from your Call Log.

While on an active call, navigate to the desired screen of the application, tap and hold the contact until the Quick Contact options appears. Select Transfer to perform an attended transfer.
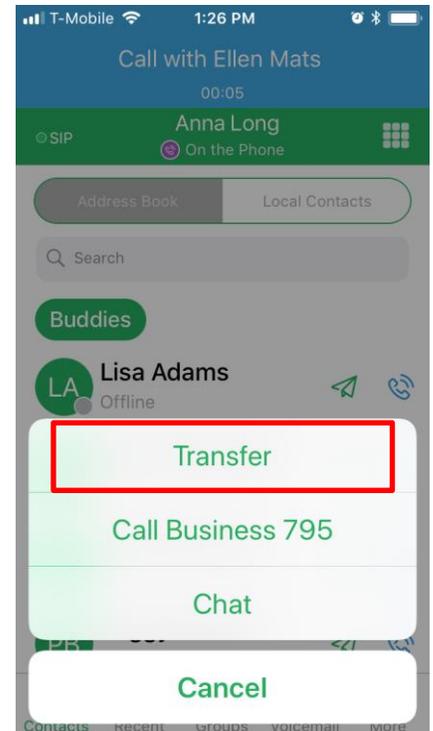
9.4.4 Attended Transfer

1. While on an active call, tap the Add Call option.
2. Search the contact by name or type the number to call. The active call is placed on hold.

Once the called party answers, you can merge the two active calls.

3. Tap the Transfer button in the

softphone screen. TRANSFER
Select the Active call at the top.
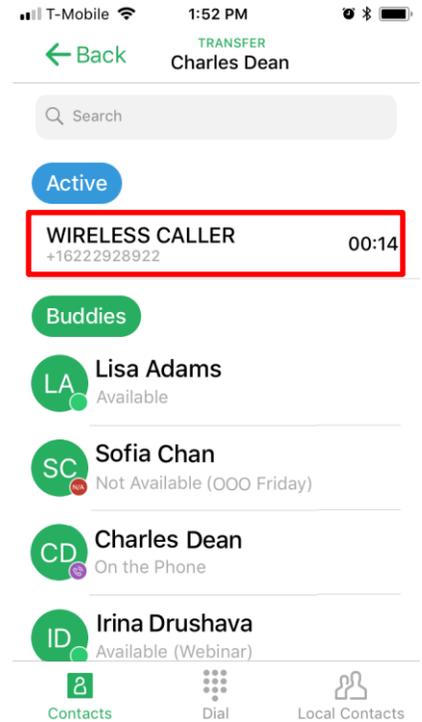
9.4.5 Park

To park a call, tap the Park button in the

softphone screen. PARK CALL

A popup with the part ID assigned to this call will appear on screen.
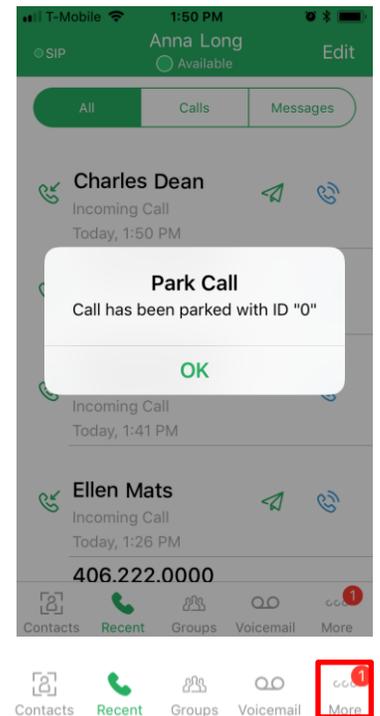
To retrieve a parked call, tap on the More icon in the bottom right corner and select Park.

Tap on the phone button 📞 next to the call to retrieve the call from hold.
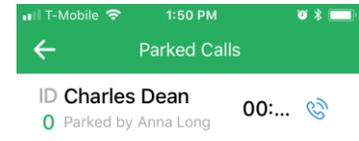
10 Contacts

The Contacts screen presents the list of coworkers that you have previously selected as your buddies at the top. It is a convenient way to keep track of coworkers that you interact with frequently.

If you scroll to the bottom of the list, you will see the full list of contact on the MX system.

You can search for a person by typing the first letters of the buddy in the search bar to start the matching process.
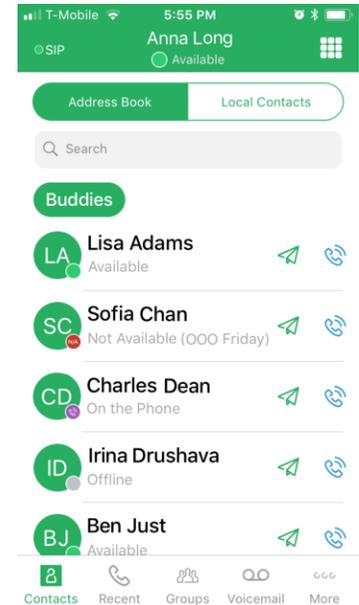
Tap on the phone icon 📞 next to the person's name to see options for calling this person.

To initiate a call, tap on the Dial Call icon 📞 next to the number you wish to dial.
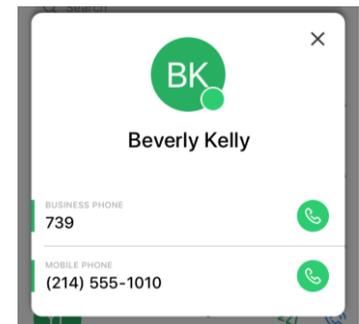
To initiate a chat, tap on the Send icon next to the person's name.

You can see the chat history with this person.

Type a message and tap the send the Send icon or Enter on the keypad.

From this screen, tap the ⋮ icon to see more options.

- Place a call
- Convert this chat into Group Chat, see Section 12 for more details
- View their contact info
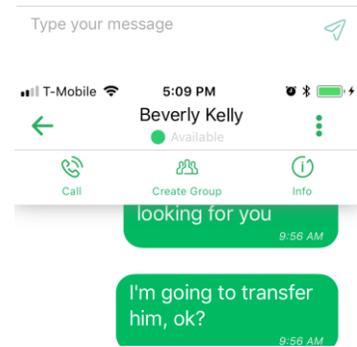
From the Contact Info screen, you can do the following:

- Place a call
- Send this person an email message
- Add or Remove this person to your buddy list
- View recent history for that buddy, which includes both calls and messages
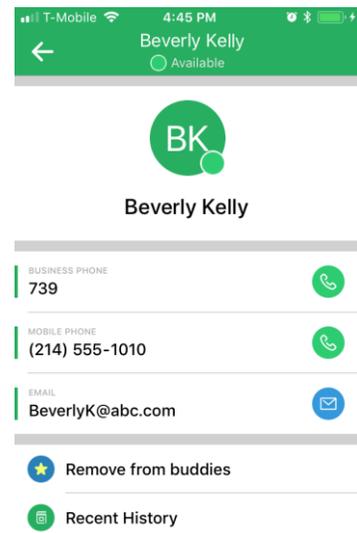
11 Chat

To initiate a chat, tap on the Send icon
next to the person's name in the Contacts
list.

You can see the chat history with this
person.

Type a message and tap the send the Send
icon   or Enter on the keypad.

From this screen, tap the ⋮ icon to see
more options.

- Place a call
- Convert this chat into Group Chat
- View their contact info
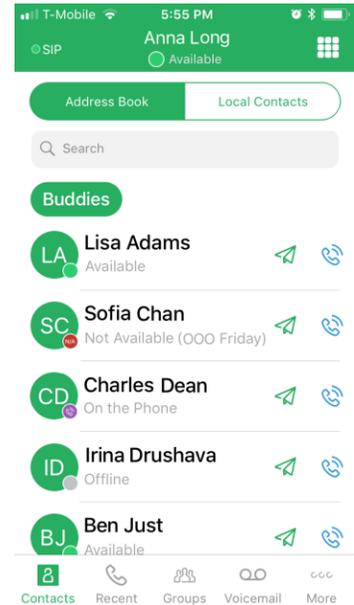
When converting a Chat session into a Group chat:

1. Select members that you want to be part of the group from the Contact list below. A checkmark appears next to selected members.
2. Tap Done button once all members are selected.
3. The new group now appears in your Groups screen.

By default, this is a private group chat. Other coworkers cannot join private group discussions without invitation from a group member. See Section 12 for more details on converting private groups to public chats.
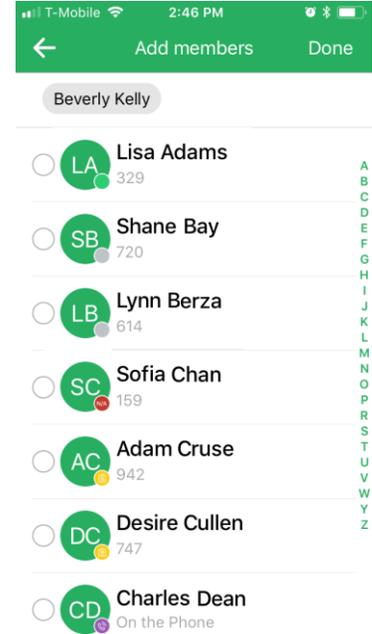
12 Groups

On this screen, you can view Group Chat/Team Messaging feature. To access the Groups menu, tap on the Group icon on the bottom bar.

Note: The MX system must be running 12.0.4 or higher for Group Chat to function.

Group screen shows your Private and Public groups. Other coworkers cannot join private group discussions without invitation from a group member. Any user on MX can join Public groups.

To join an existing Public group, tap on Join group button.

Select a group from the list and tap on Join in the popup.
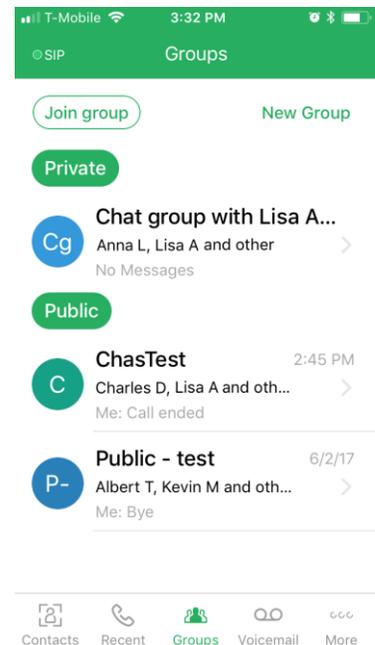
To create a new group, tap New Group.

1. Type the name of the group
2. You can toggle whether the group is Private or Public.
3. Click Next to proceed to member selection.
4. Select members that you want to be part of the group from the Contact list below. A checkmark appears next to selected members.
5. Tap Done button once all members are selected.

If you are a member of a group, tap on the group name to see chat history.

You will see a number of participants at the top of the screen.

To communicate with the group, type a message and tap the send the Send icon

or Enter on the keypad.

Tap on the bar at the top of the screen to see more options.

Tap on the More icon to see group Settings screen
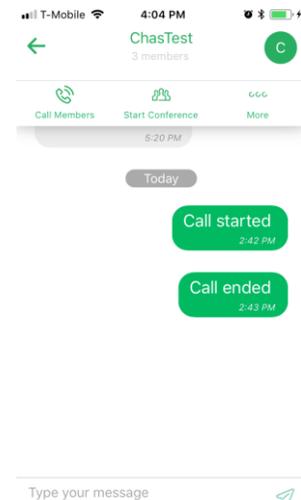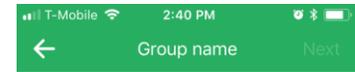
If you are the owner of the group, you can rename it, change whether it's public or private and transfer ownership of the group to another member.

Group owner can also remove members from a group by swiping from right to left on their name in the member list.

All members of the group can add new members to the group. Group members can leave a group at any time or mute notifications for it.
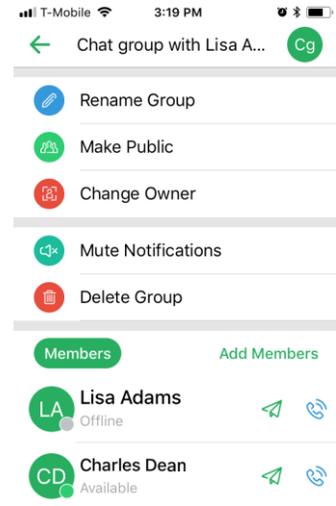
12.1 Initiating Conference Calls from Chat Groups

You can initiate a conference with members of the Chat Group from the Chat Group screen.

Note: The MX system must be running 14.0.4 or higher to utilize this functionality.

Tap on the name of a group and then tap on the bar at the top of the screen to see more options
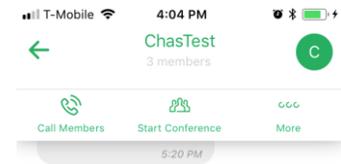
There are two ways to initiate a conference call to group members:

Call Members

The MX system creates a conference. The system rings all members of the Group. When they answer, they will hear "connecting now" and be placed into the conference.

Start Conference

The MX system creates a conference. A group text is sent stating the conference call has started. When the call ends, a group text stating call ended is sent. Group members are free to join this call at any time. This method is recommended if not all members of the group are required to join the conference call.

When you create a conference call, your phone will ring.

After answering it, you will see the softphone screen. You can use ordinary call controls from this screen.
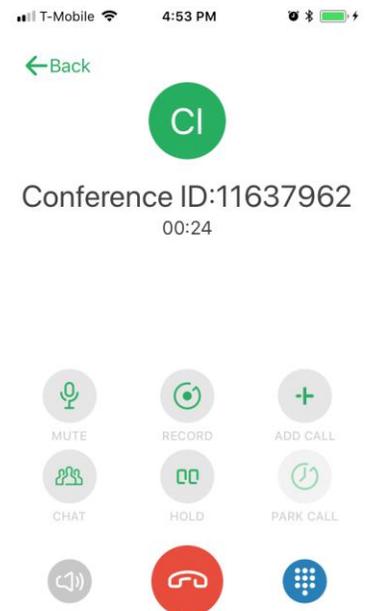
Note that disconnecting the call from this screen, will disconnect you from the conference. If other members are still on the call, the conference will continue even after the person who initiated the call has left.

Tap the Back button to see more options

From this screen you can add participants to the call who are not members of the group, see who is currently on the call or end the Conference call.
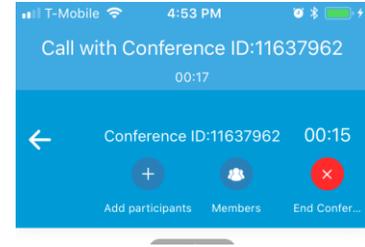
13 Voicemail

To access the Voicemail menu, tap on the Voicemail icon on the bottom bar.

My voicemail subheading in the list notes the messages for your user extension.

If you are an agent of a Call Group, Hunt Group or an Operator Group, you will also have access to the voice mail box for these groups. Note that the Group voice mail is only available if the Enable Agent Roles option is active in application settings. See section 14.2 for more information.

Tap My Voicemail to view your list of voicemail.

A list of voicemails is displayed.
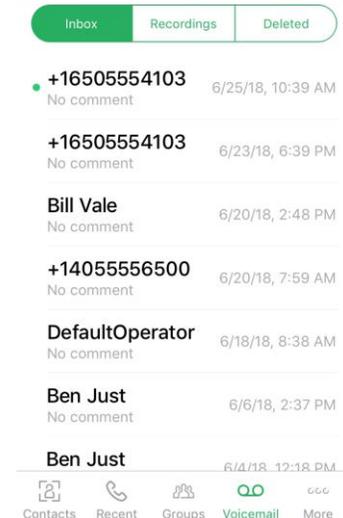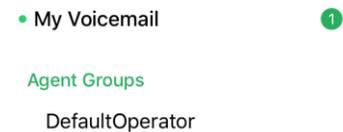
Tap a voice message to present the options:

- Tap Play icon to listen to message

- Tap Delete icon to move the message to Deleted folder

- Tap Call icon to call back

- Mark as read or unread

- Tap Forward icon and select Forward Message to send this message to another user on the MX system
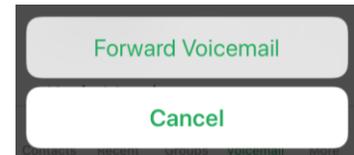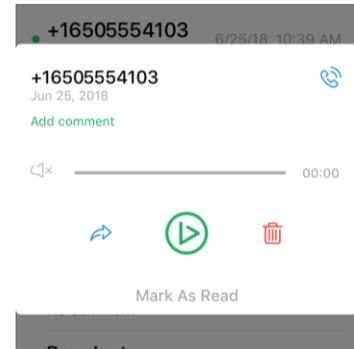
When you choose to forward the voicemail, you will see a list of users on MX system. Checkmark next to the name of the person to send the message too.
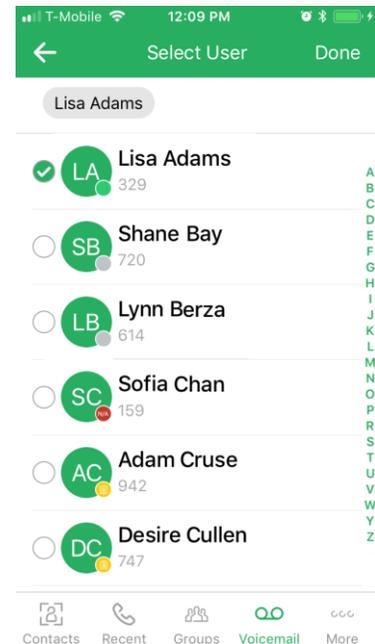
You can mark this message as either Urgent or Private. It is not possible to mark it as both Urgent and Private at the same time.

You may type or record an introductory comment to send along with the message.

When done, tap on Send in the top-right corner of the screen to finish.
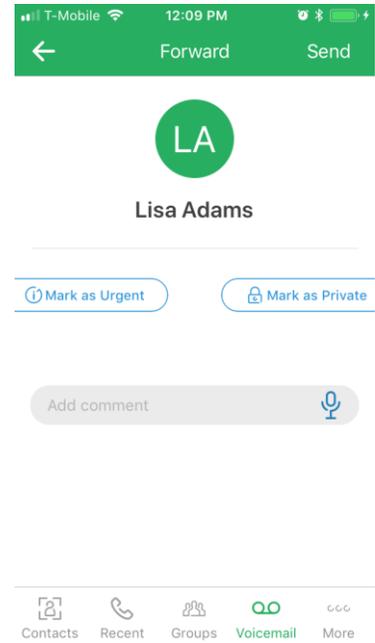
13.1 Configuring Voicemail Greeting

Tap the setup icon 🌀 to access your mailbox greetings.

You can record your name and your greetings from this screen.

Tap the desired greeting..

To record a new greeting tap the Record icon 🎤 and speak the greeting.

When you are done you can listen to the recording.

If you are not satisfied with your recorded greeting, tap Delete icon 🗑 to discard it.
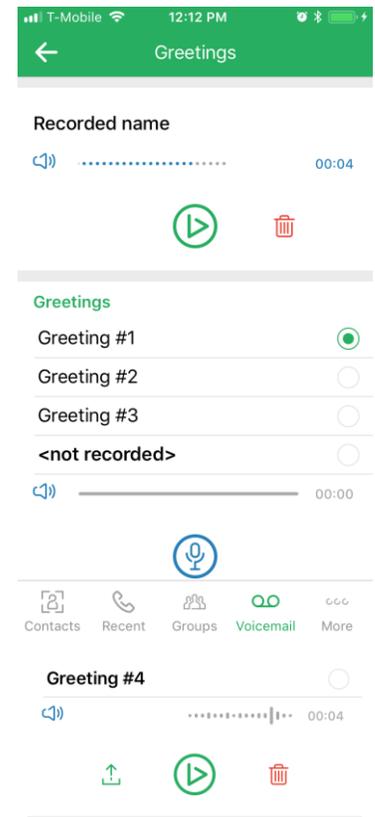
When you have recorded a greeting that you like, tap on the upload ⬆ button to save it on the MX system.

You can select an active greeting, by tapping on the radial button next the name of the greeting.

# 14 Settings

To access the Settings menu, tap on the More icon in the bottom right corner and select Setting.

- **Bound Phone** – Your cell/mobile phone number.

  This field is required for Zultys Mobile to function if Softphone is disabled. Even when utilizing the Softphone, Zultys Mobile requires a bound number to be entered in case the iPhone is unable to connect to either the mobile or Wi-Fi network.
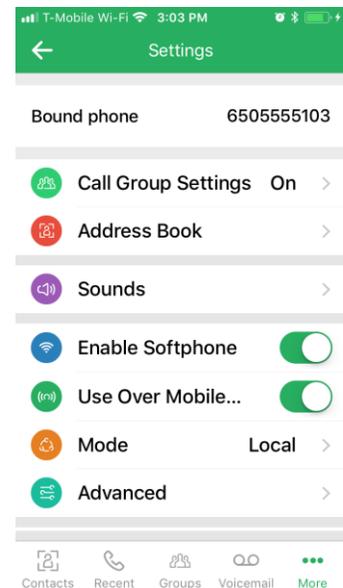
- **Sounds** – Tap to access the sound setting to edit the following options:

  - **Ring** – Set the ring options

  - **Messages** – Set the audible alert for incoming Instant Messages

  - **Keypad** – Set the audible alert for key pad presses

- **Call Group** – Tap to access the Call Group Settings screen. See Section 14.2.

- **Address book sort** – Choose whether to sort the users in the address book by their first or last names.

- **Enable Softphone** – If enabled, Zultys mobile uses built-in softphone function to make outgoing calls and to answer incoming calls when connected to a suitable Wi-Fi network. When Softphone is enabled a SIP indicator appears at the top of the application screen.

- **Use Over Mobile Network** – If enabled, Zultys mobile uses built-in softphone function to make outgoing calls and to answer incoming calls when connected to the 3G/LTE network and no Wi-Fi is available.

- **Mode** – Tap to access the Remote Mode Settings Screen. See Section 14.1.

- **Advanced** – Under some circumstances, you may need to adjust the softphone settings in this menu. Please consult a Zultys Certified Systems Expert before making any changes to these settings.

- **About** – displays version number of Zultys Mobile.

- **Logout** – Logs the user out of Zultys Mobile.

14.1 Mode

By default, the application starts in Local Mode. When Remote Mode is activated the following occurs:

- The remote mode indicator appears at the top of the application screen.
- You are logged out of your active MXIE or ZAC sessions.
- All of the calls sent to your user extension are sent directly to your iPhone, after the timeout period specified in this section expires.
- All call handling rules are disregarded.
- Your assigned office phone still rings when calls are received. The assigned phone continues to ring even after the call has timed out on the mobile device.

Tap on Remote Mode in the Settings screen to access the following settings:

- **Enable** – Select this option to enable remote mode.
- **Call (sec)** – Type the number of seconds the MX waits until automatically forwarding calls to Bound Phone when Remote Mode is enabled.
- **Voicemail (sec)** – Type the number of seconds the MX waits until forwarding calls to voicemail.

14.2 Call Group Settings

From this screen you can edit the following Call Group related settings:

- **Enable Agent Roles** – If this option is enabled, you will be presented the option to log in as an Agent when opening Zultys Mobile. By default this option is disabled.
- **When active on a call as a user, become Not Available as an ACD agent or operator** – If this option is enabled, a user will become unavailable for ACD/Operator calls while they are on a call. By default this option is disabled.
- **When active on a call as ACD/ICC/Hunt agent or Operator become busy as a User** – If this option is enabled, a user will become unavailable for user calls while they
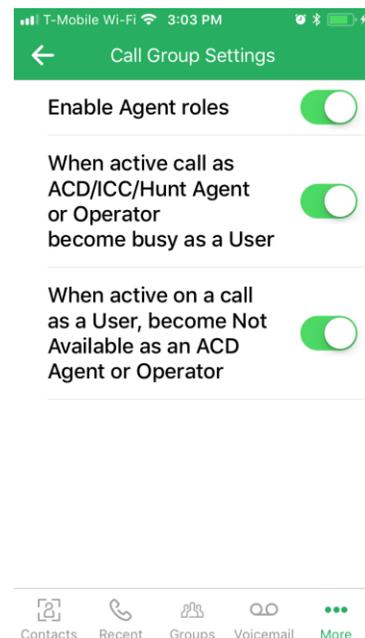
are on a Group/Operator call. By default, this option is enabled.

14.1 Customizing Navigation Bar

To access this setting, tap on Edit in the top right corner and select Setting.

The icon that are currently on the bottom navigation panel are greyed out. You can drag remaining icons to where you would like them to be located on the navigation bar or drag icons already on the navigation bar to change their placing.

Tap Done in the top right corner to finish.
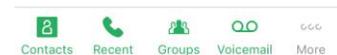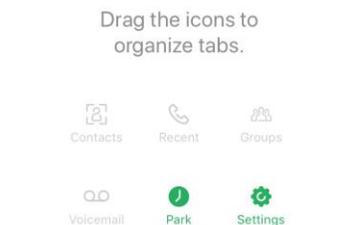
15 FAQ

The following are some of the common questions about Zultys Mobile and its use.

15.1 Where can I find the version number of Zultys Mobile that is installed on my iPhone device?

Tap on the More icon in the bottom right corner and select Setting and select About.

15.2 I have a problem with the connection to the MX server when I am using my iPhone with Wi-Fi connection to office network.

Typically, these kinds of problems are related TCP/IP configuration. Many office networks are using private sets of IP addresses with many security restrictions. Please ask your system administrator for assistance.

15.3 What happens when you "log out"?

The following actions are taken when you "log out" of Zultys Mobile:

- Zultys Mobile disconnects from the MX and no longer communicates with the MX until you log in again.
- When logging in again Zultys Mobile will ask you to enter the password again.
- If you disable "Auto login," you will have to enable it again.

15.4 When I initiate a call from Zultys Mobile my iPhone does not ring

Ensure that the correct cell/mobile number is defined in the "Bound phone" setting or enable the Softphone function.

15.5 When I select "Answer" on a new call notification my iPhone does not ring

Ensure that the correct cell/mobile number is defined in the "Bound phone" setting or enable the Softphone function.

15.6 I am receiving notifications (ringing, messages) even though I closed the application

In order to cease notifications, you must properly logout of the Zultys Mobile Communicator application. Simply closing or moving the application to the background will not silence notifications.

15.7 Can I forward all incoming calls to an external phone number?

To forward all incoming calls to an external phone number, enter the external number in the Bound Phone field in the Settings menu.