

# OpenTouch® Conversation for iPhone

## User Manual

OmniPCX Office Rich Communication Edition user  
OpenTouch Business Edition and Multimedia Services Conversation user  
OpenTouch Business Edition and Multimedia Services Connection user

R2.3

8AL90645ENACed01 1722



Direct link to the Apple Store





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## OpenTouch Conversation Application Provisioning

This document describes the services offered by the OpenTouch Conversation application for iPhone.

The following guidelines are intended to help you get the most out of your device:

- Local contacts should be enriched with useful details: photo, job title, company, phone numbers, email, IM, address, etc (For example, a photo & caller identification will be used in the Wall).
- Keep your local contacts synchronized across all your devices. For example, you can use Exchange Active Sync or Google Contacts. The idea is to add a new contact on one device only and it is automatically synchronized on the other devices via sync over the air.
- When you can, use a Bluetooth handset so that you can take full advantage of your display whatever the situation.
- Use Corporate WLAN or Wi-Fi when available for less network latency.
- Remember: always drive safely, avoid distractions and follow local laws!

OpenTouch Conversation for iPhone is an application that is common to OmniPCX Office Rich Communication Edition (OXO RCE), OpenTouch Business Edition (OTBE) and OpenTouch Multimedia Services (OTMS) infrastructures. Your system administrator will customize the application depending on the host infrastructure. Please consult the corresponding user manual by selecting the corresponding chapter for your system. If you need to check which system you are connected to, please open the 'About' section in the application:



[OpenTouch Conversation User Manual for OXO RCE User](#)



[OpenTouch Conversation User Manual for OTBE/OTMS Conversation User](#)



[OpenTouch Conversation User Manual for OTBE/OTMS Connection User](#)



## Recommendations

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For the latest requirements, please refer to the application description in the App Store.

### I.1.1 Restricted access

The OpenTouch Conversation for iPhone application requires access to some of your phone's features such as, your contacts, the microphone or the camera for QR Code processing. When you use the application for the first time, you are prompted to allow the application to have access to these features.

This setting can be changed in the privacy menu of the iPhone settings.

### I.1.2 Certificates

At the first connection, you will be prompted to accept certificates, to ensure security of the data transfer when the application communicates with the Call Server of your company.

If the certificate has changed due to, for example, expiration or domain modification, you will be informed immediately and you will have to accept the new certificate.

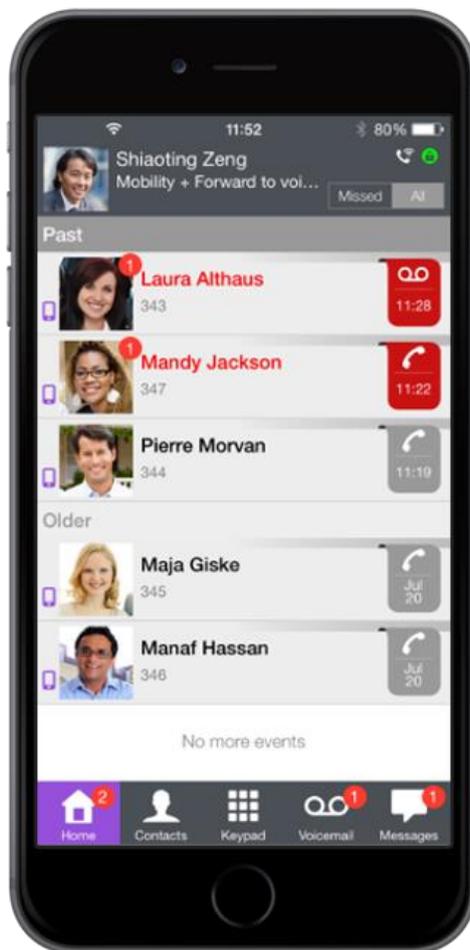
### I.1.3 Application update for OXO RCE User



If you update your application from an old version to the new OpenTouch Conversation, you must first uninstall the old version before installing the new one. The two versions should not be used at the same time.



# I - OpenTouch Conversation User Manual for OXO RCE User





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## I.1 Start OpenTouch® Conversation

### I.1.1 Start the application

Select the OpenTouch Conversation Icon.



### I.1.2 Sign in

When you connect for the first time, if you have not configured the connection parameters, a connection screen is displayed requiring the OmniPCX Office RCE subscriber credentials.

1. Set your connection parameters.
2. Enter your user name (login) - phone's internal number. Enter your password. The password is the same as the voicemail.
3. Sign in.
4. In the initial login screen you can see the 'Scan QR Code' button (when necessary, hide the input keyboard). When you press this button, the application scans the QR Code image sent by your system administrator. The application then automatically configures the connection parameters (the number of parameters provided depends on your security policy).



### I.1.3 Voice-over-IP mode

OpenTouch Conversation integrates voice over IP (VoIP) capability allowing the user to place and receive business calls on the mobile through the wireless LAN (WLAN). Unless you do not wish to use VoIP (deactivated via a dedicated setting), VoIP capability will be provided automatically as soon as the mobile has corporate WLAN coverage and has successfully registered to the SIP server.

A VoIP icon on your mobile shows the VoIP status:

- : VoIP capability is activated (application is registered to the SIP server).
- : VoIP capability is deactivated via a dedicated setting.
- No icon displayed: cellular mode only or loss of SIP connection (VoIP capability is temporarily unavailable).



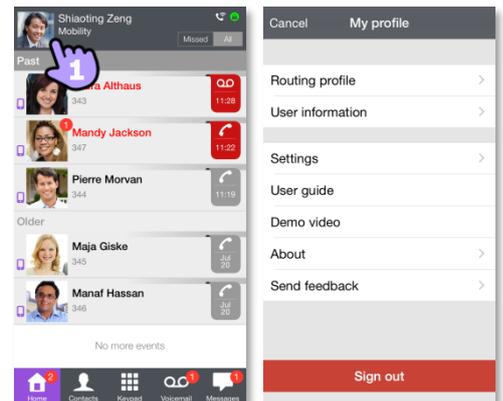
### I.1.4 Using a Bluetooth audio device connected to your phone

For cellular calls, use your Bluetooth® headset as you usually do.  
For VoIP calls, we recommend to control the OpenTouch Conversation application directly from your smartphone.

## I.2 Settings

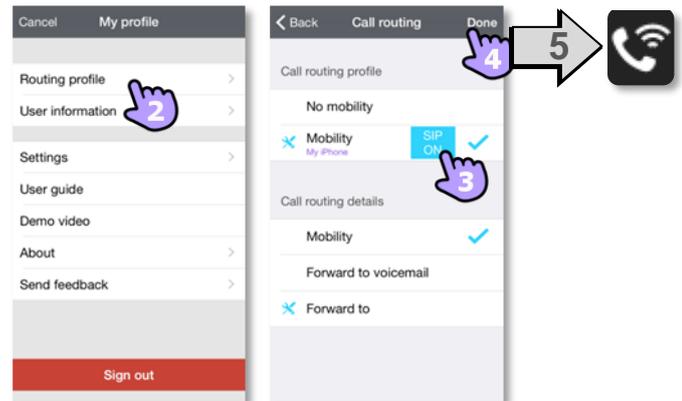
### I.2.1 My profile

1. Open your OpenTouch profile:
  - Call Routing.
  - Display your user information.
  - Access to settings.
  - Software version.
  - Sign out.



### I.2.2 Activate / deactivate VoIP feature

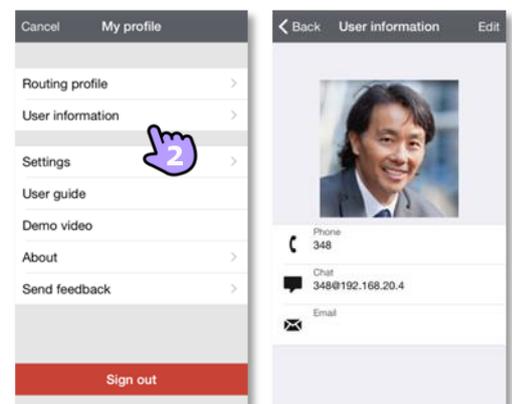
1. Open your OpenTouch profile.
2. Open the routing profile management.
3.  Activate / deactivate VoIP feature.
4. Apply.
5. A specific icon is displayed on your home page if the feature is activated.



By default, the VoIP setting is activated.

### I.2.3 Display your user information

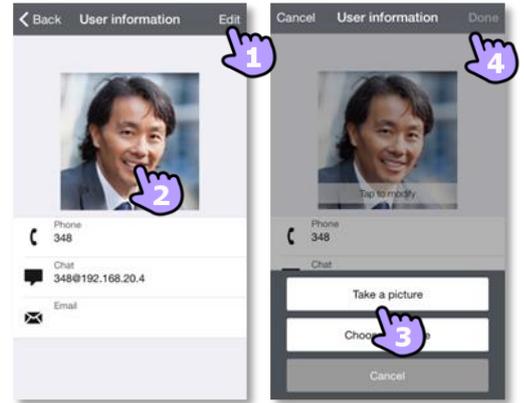
1. Open your OpenTouch profile.
2. Display your user information.





### 1.2.4 Change your photo / avatar

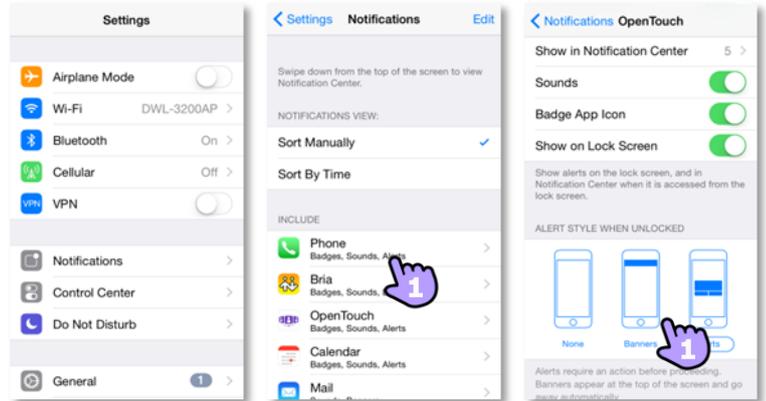
1. Select the edition mode.
2. Tap on your current photo/avatar to change it.
3. Select your new picture.
4. Apply.



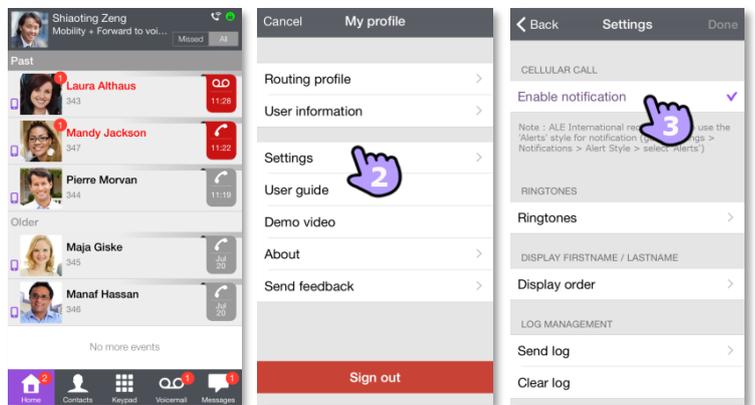
### 1.2.5 Notifications

We recommend configuring notifications as follows.

1. Open iPhone notification settings for OpenTouch Connection. We recommend using 'alert' style for notifications.



2. Open the OpenTouch® Conversation settings.
3. Ensure that enable notification is checked.





## I.3 Homepage

### I.3.1 Homepage description

1. My profile: settings and information about the user.
2. Display of all conversation logs.  
Display of missed conversations (filter).
3.  Conversation wall.  
The number of new events are displayed (number of missed calls + number of unread messages).
  -  Contacts.
  -  Dialer.
  -  Voicemail access.  
You have unread voice messages (the number of unread messages is displayed).
  -  Display of instant messages (filter). The number of unread messages is displayed.



### I.3.2 Status icons

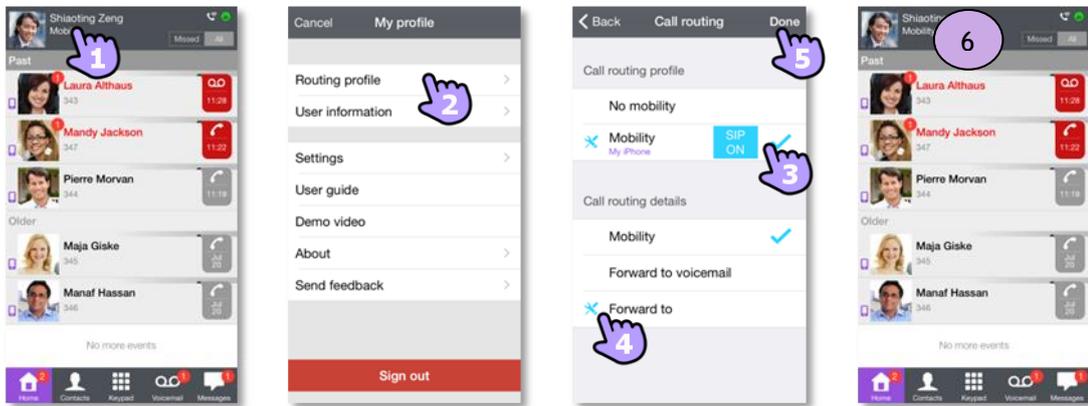
VoIP capability is activated (application is registered to the SIP server).	
VoIP capability is activated but no SIP connection (VoIP capability is temporarily unavailable).	
VoIP capability is deactivated via a dedicated setting.	
Application is connected and fully available.	
Application is disconnected. The application does not display any new event. You cannot access any of the services.	
Application is connected but some services are not accessible.	
Selected routing profile with the mobile has no ringing on incoming calls.	
Call in progress.	
Missed calls.	
New voice message(s).	



## I.4 Call Routing

### I.4.1 Select your routing profile

1. Open your OpenTouch profile.
2. Open the routing profile management.
3. Select a profile... >> Details of the selected profile are displayed just below.



4. You can customize a selected profile.  
Select which devices will ring when you receive an incoming call.
5. Apply.
6. The active routing profile is displayed in the user banner.

The displayed routing profiles depend on your configuration and installation. For example, Office profile is displayed if you have a multi set configuration.

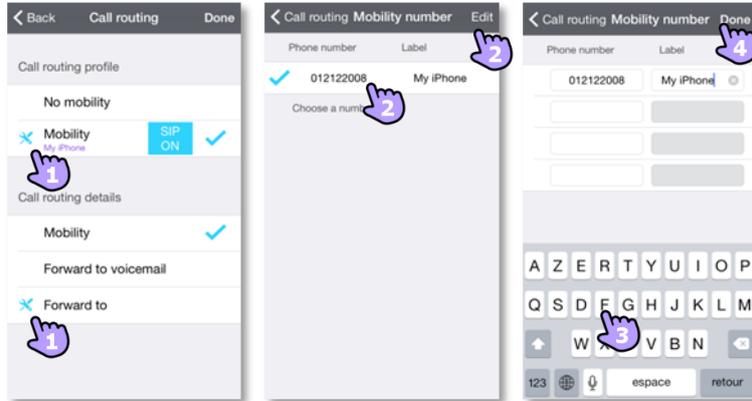
At first launch of the application, a Popup will ask you for nomadic destination number.  
The call routing details depend on the selected profile.

If you selected a routing profile with mobile not ringing, a specific status icon is displayed (  ).



### 1.4.2 Define numbers

- Select or define a phone number to use for mobility mode.
- Select or define a number to forward your calls on to.



1. Select the option to define or modify the number.
2. Select the number in the list of pre-defined numbers, edit the list to modify an existing number or create a new number (maximum of 4 numbers).
3. Enter the number and its label.
4. Apply.

### 1.4.3 Change routing profile via QR code

You can modify your current ringing call routing profile with any internal deskphone which is prepared with QRcode.

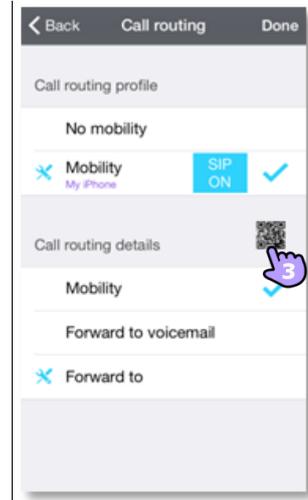


You are facing a QR code of the internal deskphone.

1. Open your OpenTouch profile.
2. Open the routing profile management.
3. Define the new internal number by scanning the QR code
4. Apply.

Your incoming calls will ring on this new deskphone. The new routing profile (mobility) is displayed.

To go back to the initial routing state, scan again the QR code





### 1.4.4 Conversation wall (History)

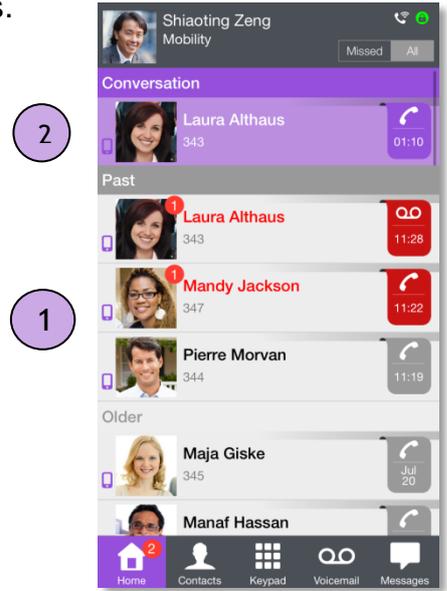
Conversation Wall contains the history of all your conversations. The conversation wall is divided into 2 parts:

- 1 Past conversations.
- 2 Conversation in progress.

How to understand the conversation wall:

Each item represents a conversation log by user, by time slot and by the corresponding number of unread events. The badge contains the icon associated with the media used during the conversation (phone, voicemail and meeting).

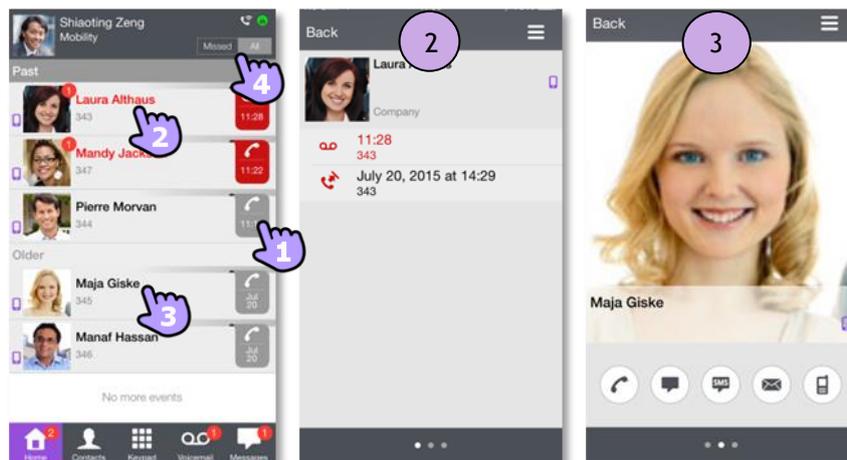
- Red badge: missed or new events.
- Purple badge: ongoing conversation.
- Grey badge: past event.
- Conversation.
- Instant messages.
- Voice messages.



- : This icon indicates a contact from the local directory of the mobile.
- : This icon indicates a favorite contact.

The action on a contact depends on how you select it

1. Select the badge to direct call the displayed number.
2. If you select an unread event, you open the history card directly.
3. If you select a read event, you put your contact on the stage.
4. To display new missed calls only, select the appropriate filter or tap on the conversation wall icon.

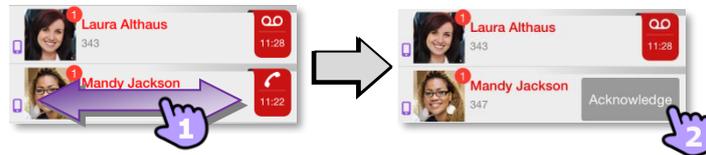




### I.4.5 To acknowledge a missed call

If an item is marked as a missed event, you can acknowledge the event.  
A conversation log is acknowledged if all events for that item are acknowledged.

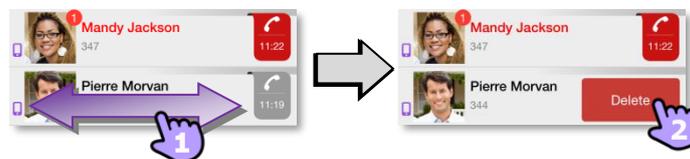
1. Swipe right on the item.
2. Acknowledge the event.



### I.4.6 To delete one conversation log:

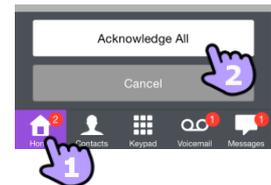
You can delete a conversation log if it is acknowledged.

1. Swipe right or left on the item.
2. Delete the conversation log.



### I.4.7 To acknowledge all missed calls

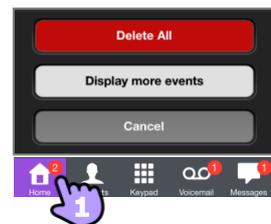
1.  Press the home page icon.
2. Acknowledge all missed calls.  
Confirm the acknowledgement of all missed calls.



### To delete all conversations in the wall

You can delete all conversations if all events are acknowledged.

1.  Press the home page icon.
2. Delete all conversations.
3. Confirm the deletion.





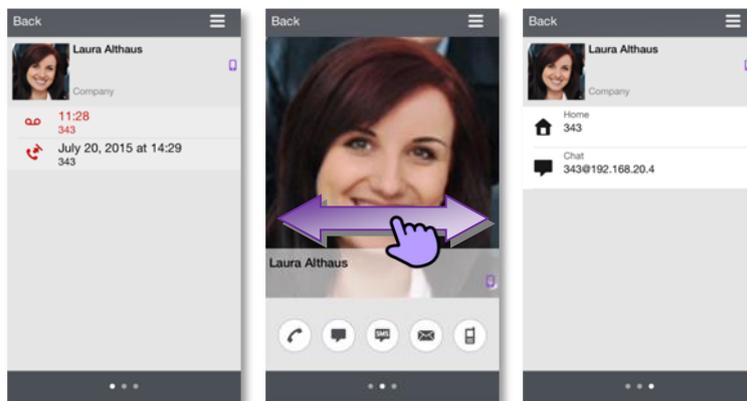
### 1.4.8 Contact card

A contact card represents a person. Open a contact card by selecting a contact in the conversation Wall or in your favorites.

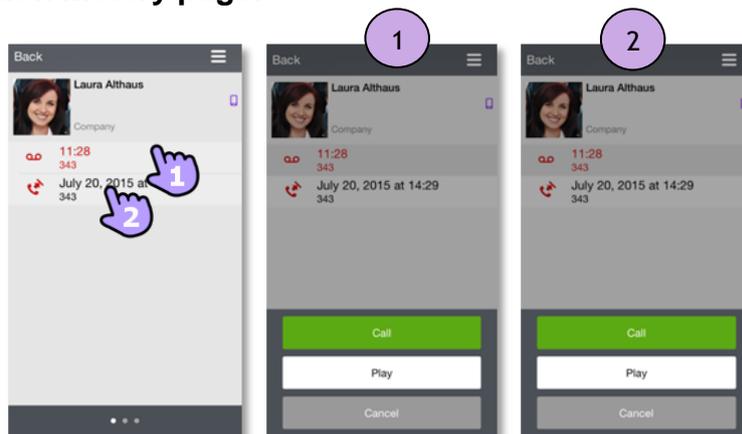


A card contains 3 pages.

- Page 1 is the conversation history with this contact.
- Page 2 is the contact on the stage. The default number used to make a call is the business number.
- Page 3 is the contact details.
- Swipe right and left to navigate between the 3 pages.



From the conversation history page:



1. you can play a voicemail or call the originator of the voicemail.
2. you can acknowledge or delete an event or call the contact.



### I.4.9 Search a contact

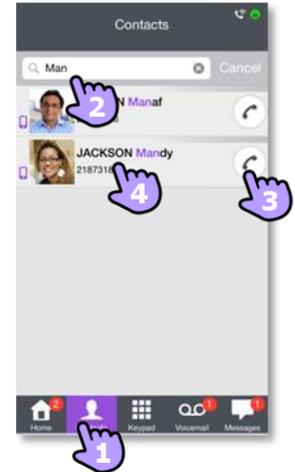
Search for a contact in your local contacts or in a corporate look-up by using the search interface.

1. Open your contact tab.
2. Enter the name of your contact.  
The search runs immediately on local contacts (predictive search). To perform a corporate look-up, select the specific search button.



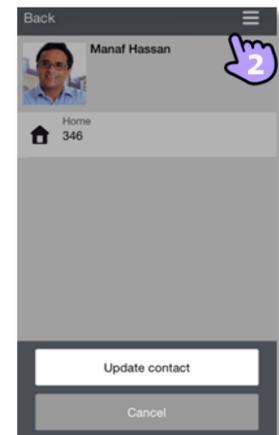
This icon indicates a contact from the local directory of the mobile.

3. Call the contact.
4. Open the contact card.



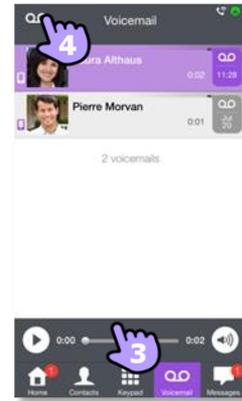
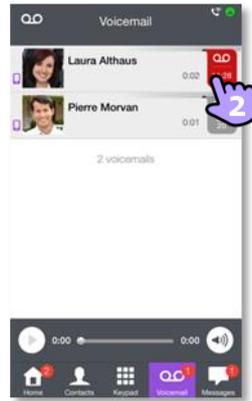
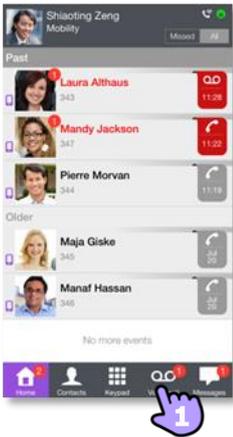
### I.4.10 Add a contact to your local directory

1. Open a contact's card.
2.  If the contact is not in your local directory, you can save them as a new local contact.  
If the contact is in your local directory, you can update it by opening your local directory directly from the application.





### I.4.11 Visual Voice mail



1. You have unread voice messages (the number of unread messages is displayed). Open your visual voicemail. All read and unread messages are displayed.

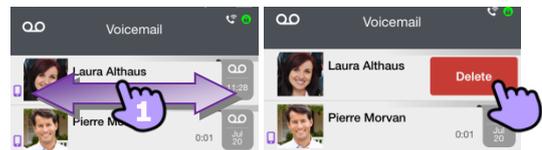
If you have one or more unread messages, the visual voicemail tab is automatically opened when you log in to the application

2.  Select the message to listen to.
3. From the selected message you can:
  - Move the cursor along the play bar to go forward or backward in the message.
  - Pause or resume the message.
  - Activate/deactivate loudspeaker.
4.  Customize your voice mail.



#### To delete a message

1. Swipe right or left on the item.
2. Delete the message.  
You cannot delete an unread message.



The Voice mail tab is not visible when a voicemail box has not been created for the end-user.

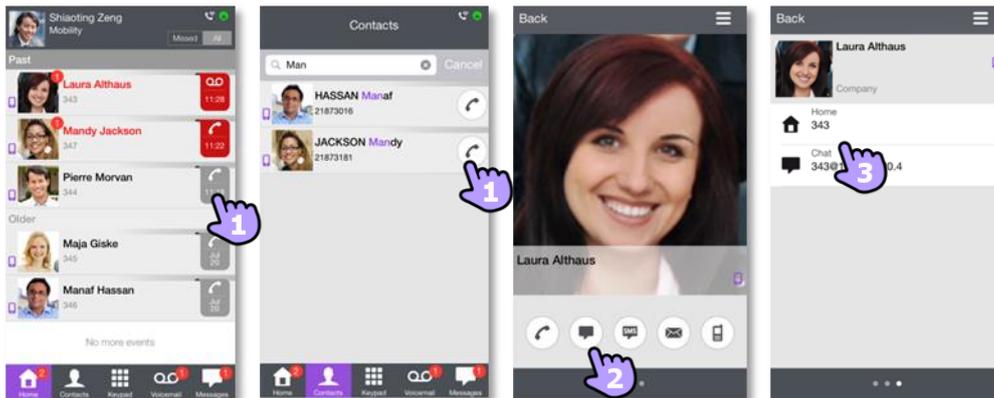


## I.5 Conversation

Actions available depend on the type of conversation and system. If an action is not available, the icon is grayed.

### I.5.1 Set up a conversation with a contact

- You can make a call from the conversation wall, visual voicemail tab or instant messaging tab.
- You can make a call from a search on your local contacts or from a corporate look-up.
- You can make a call from the contact card (details or history).



How to set up a conversation with a contact

1. Call directly using the displayed phone number.
2. Set up different types of conversation (if available).
3. Call using a specific phone number from the contact card.

### I.5.2 Make a conversation by entering a number

- Open the keypad.
- Enter your caller's number.
-  Make the call.



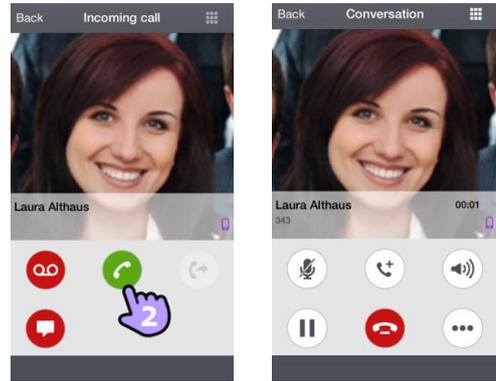


### 1.5.3 Receiving a conversation (VoIP or Cellular)

Depending on your connection mode (VoIP or Cellular), you can answer a call in the following ways:

#### 1.5.3.1 VoIP mode

1. Call is presented directly in the OpenTouch Conversation application (i.e. not the native dialer).
2. Answer the call.
3. You are in conversation



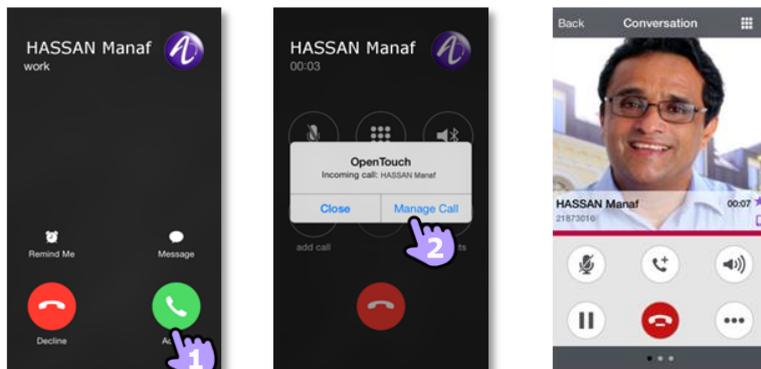
Answer the call.	
Forward an incoming call to business voice mail.	
Answer with an instant message.	
Transfer the call to another device or number. Select the destination of the transfer: one of your office devices or a pre-defined number or enter another number.	

If you receive a call while your phone is locked, a pop-up is displayed on the page. Slide and enter your PIN code to take the call and follow the instructions as described in this section.

#### 1.5.3.2 Cellular mode

Call is presented in the native dialer (Apple constraint).

1. Answer the call.
2. A pop-up notification allows you to decide whether you want to manage the call in the OpenTouch application or not.  
You are in conversation.



If you receive a call while your phone is locked, a pop-up is displayed on the page. Slide to take the call and follow the instructions described in this section.

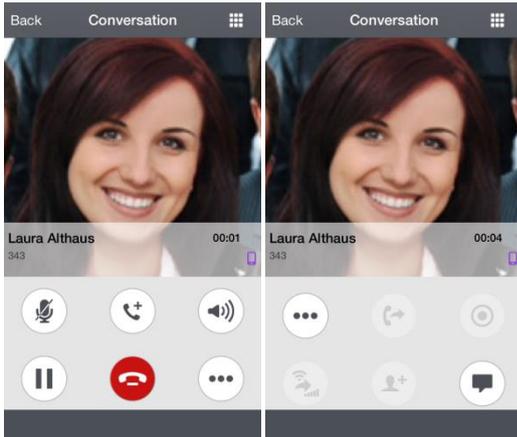


## I.6 During conversation

The actions you can perform during a conversation depends on the connection mode (VoIP or Cellular) and the type of conversation. If there are more than six icons displayed, swipe down to access other available actions

### I.6.1 Screen description

You are in conversation with one contact.



You are in a call with two contacts (hold or conference).



### I.6.2 Make a second call / Switching between two calls / Transfer call to your contact on hold / Setting up a conference / Send DTMF

Navigates between action pages when there are more than six available actions.	
End the active call. End the conference and retrieve the first caller. The second is on hold.	
Make a second call.	
Put the distant on hold.	
Recover the call on hold.	
Transfer the call to another device or number.	
Mute/un-mute the conversation.	
Loudspeaker.	
Display active or on-hold calls by swiping right or left.	
Switching between two calls.	



Setting up a conference.	
End the conference and retrieve your previous caller. The other callers are put on hold.	
Start an instant message with the contact.	
During the conversation, you can check information by consulting the Conversation Wall. Select the current conversation in the Conversation Wall to go back to the conversation screen.	
Send DTMF.	

### I.6.3 Audio media switch from your iPhone to any deskphone via QR code

When you are in conversation, you can switch the active audio media from your iPhone to any internal deskphone prepared with QRcode. You can find a QR code in a meeting room for example. You can use this feature to isolate you in a meeting room. When the conversation is ended, the routing profile automatically returns to its previous state.



-  Select the 'Divert incoming call' icon, then scan the QR code.

## I.7 Instant messages

### I.7.1 Start an instant message

An instant message is a type of conversation which offers real-time text transmission with your contact.

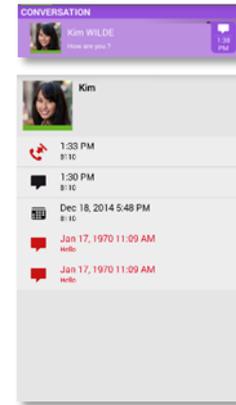
You start an instant message like other conversation from a contact card.	
---	---



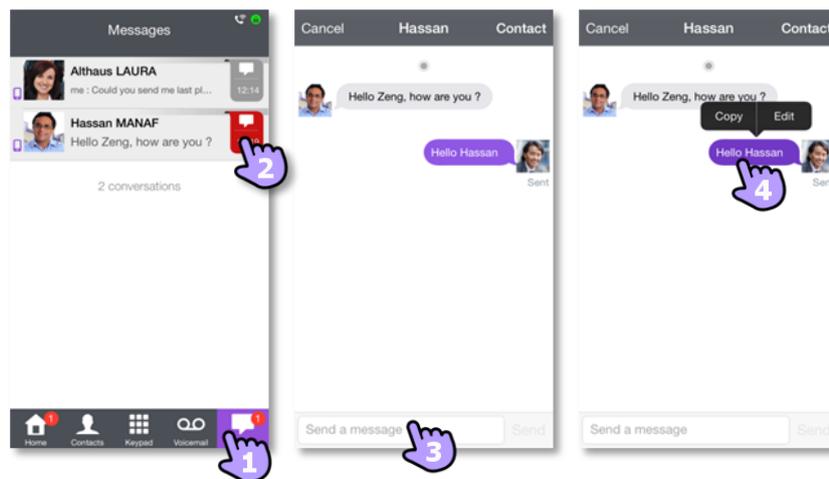
### 1.7.2 Receive an instant message

If you are online, you receive instant messages on the Wall.

If you are offline, you receive a missed event in the wall. Open the history of your contact to see the missed instant message.



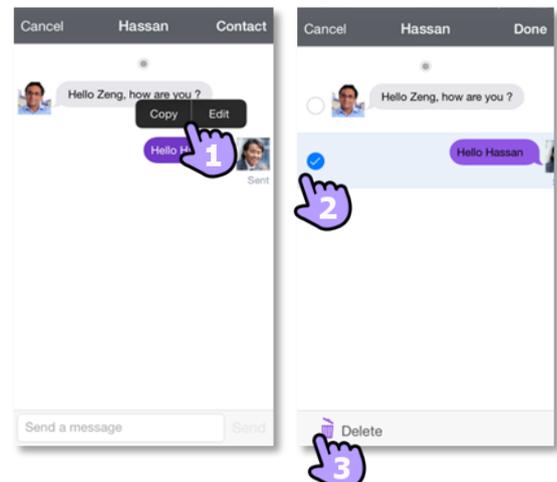
### 1.7.3 Consult instant message



1. From the homepage, select the messages tab.
2. Select the message to consult:
  - On the left: received messages.
  - On the right: sent messages.
  - Status of the message (delivered or read) is displayed under the message.
3. Enter and send a new message.
4. Long press on a message lets you copy the message or edit it.

### 1.7.4 Delete a part of the conversation.

1. Enter Edit mode: long press on a message.
2. Select messages to delete in the conversation.
3.  Delete selected messages.



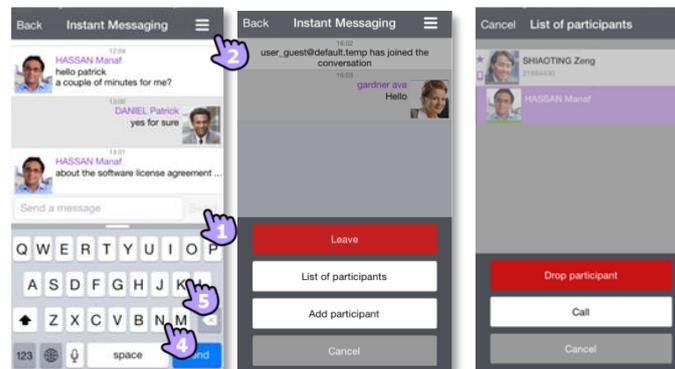


### I.7.5 Delete a conversation

1. Swipe right to left on the conversation to delete.
2. Delete the entire conversation.
3. Delete all conversations by selecting the messages tab and the corresponding action in the menu.



### I.7.6 During conversation



1. Send message.
2.  Open the contextual menu
  - Display the list of participants.  
From the list you can also open the contact card of a participant. Call the selected participant (audio answer). Drop the selected participant.
  - Add a participant to the conversation.
  - Leave the conversation.

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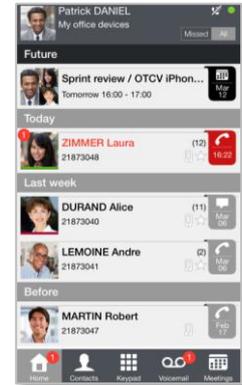
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## II.1 Start OpenTouch® Conversation

### II.1.1 Start the application

Select the OpenTouch Conversation Icon.



### II.1.2 Sign in

When you connect for the first time, if you have not configured the connection parameters (OpenTouch settings), a login configuration window is displayed to enter the OpenTouch credentials and OpenTouch server address.

1. Set your connection parameters.
2. Enter your user name (login) / Password (OpenTouch user password).
3. Sign in.
4. In the initial login screen you can see the 'Scan QR Code' button (when necessary, hide the input keyboard). When you press this button, the application scans the QR Code image sent by your system administrator. The application then automatically configures the connection parameters (the number of parameters provided depends on your security policy). The QR code can be generated with the OpenTouch Conversation for PC application or with some deskphones.



### II.1.3 Voice-over-IP mode

OpenTouch Conversation integrates voice over IP (VoIP) capability allowing the user to place and receive business calls on the mobile through the wireless LAN (WLAN). Unless you do not wish to use VoIP (deactivated via a dedicated setting), VoIP capability will be provided automatically as soon as the mobile has corporate WLAN coverage and has successfully registered to the SIP server.

A VoIP icon on your mobile shows the VoIP status:

- : VoIP capability is activated (application is registered to the SIP server).
- : VoIP capability is deactivated via a dedicated setting.
- No icon displayed: cellular mode only or loss of SIP connection (VoIP capability is temporarily unavailable).

### II.1.4 Using a Bluetooth audio device connected to your phone

For cellular calls, use your Bluetooth® headset as you usually do.

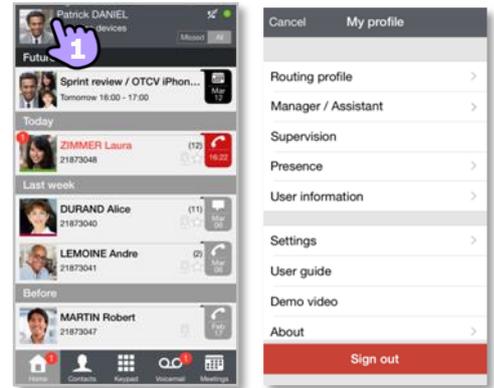
For VoIP calls, we recommend to control the OpenTouch Conversation application directly from your smartphone.



## II.2 Settings

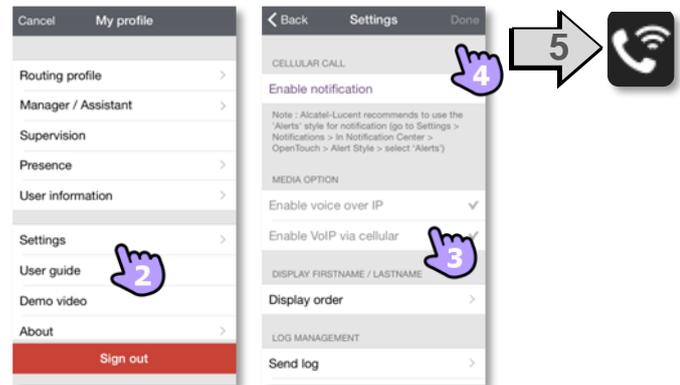
### II.2.1 My profile

1. Open your OpenTouch profile:
  - Call Routing.
  - Open Manager / Assistant settings (optional).
  - Activate / deactivate supervision feature (optional).
  - Display your user information.
  - Access to settings.
  - Software version.
  - Sign out.



### II.2.2 Activate / deactivate VoIP feature

1. Open your OpenTouch profile.
2. Access to settings.
3. Activate / deactivate VoIP feature.
4. Apply.
5. A specific icon is displayed on your home page if the feature is activated.



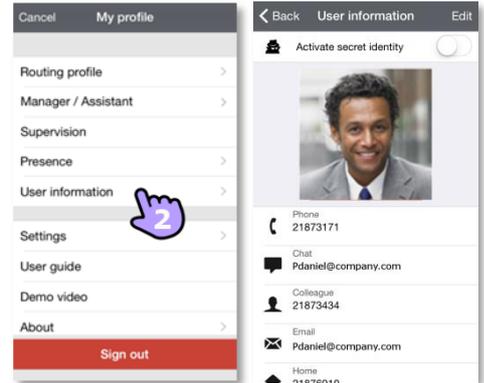
By default, the VoIP setting is activated.



### II.2.3 Change user information

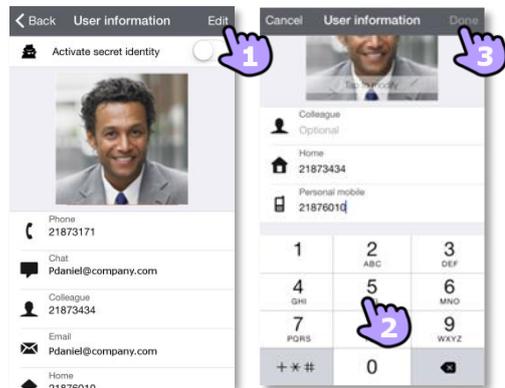
Define your private phone numbers, your photo or avatar.

1. Open your OpenTouch profile.
2. Display your user information.



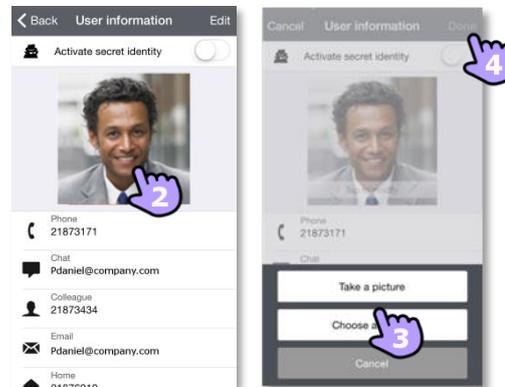
### II.2.4 Change your private phone numbers

1. Select the edition mode.
2. Define your phone numbers: business, colleague, home or personal mobile phone numbers. The business phone number is mandatory.
3. Save new phone numbers.



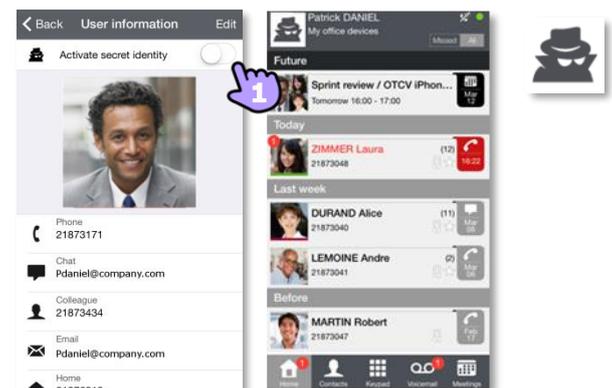
### II.2.5 Change your photo / avatar

1. Select the edition mode.
2. Tap on your current photo/avatar to change it.
3. Select your new picture.
4. Apply.



### II.2.6 Activate/deactivate the secret identity (CLIR)

1. Activate/deactivate the secret identity. Your external caller will not see your phone number. When the secret identity is activated, the secret avatar is displayed in the top banner of the wall as a reminder.

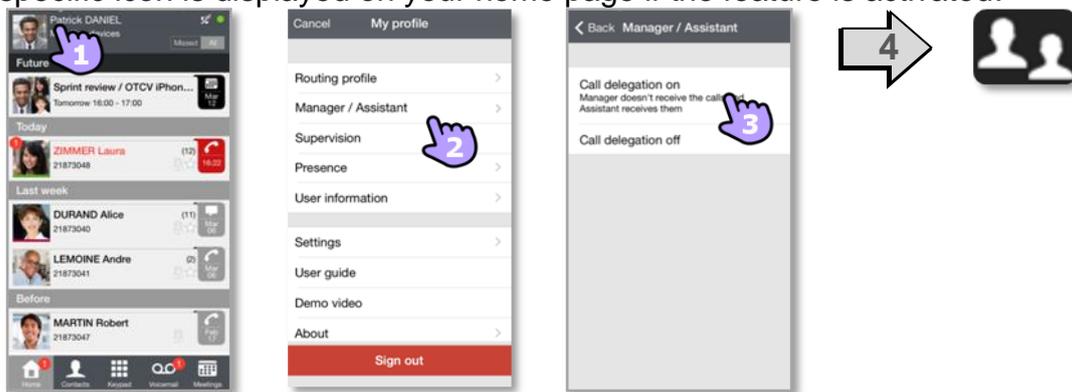




## II.2.7 Manager/Assistant (optional)

System configuration provides a 'Manager / Assistant' feature so that an assistant can receive all the manager's calls except white list calls. The white list is created by the manager from the deskphone and the corresponding calls are processed according to the active call routing profile.

1. Open your OpenTouch profile.
2. Open Manager / Assistant settings.
3. Activate (on) / deactivate (off) the delegation.
4. A specific icon is displayed on your home page if the feature is activated.

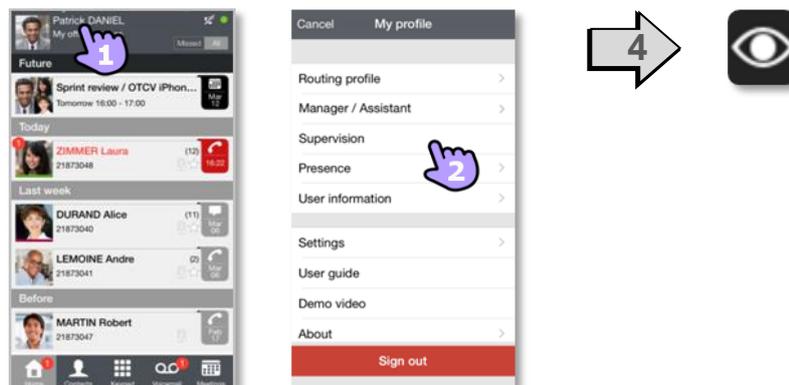


## II.2.8 Supervision (optional)

Your business phone number can be supervised. This means that your incoming calls can be picked up by a supervisor when you are absent, busy or off-site.

1. Open your OpenTouch profile.
2. Activate / deactivate supervision feature.
3. A specific icon is displayed on your home page if the feature is activated.

If your phone is supervised, the call log displays the name of the supervisor who has picked up your call.

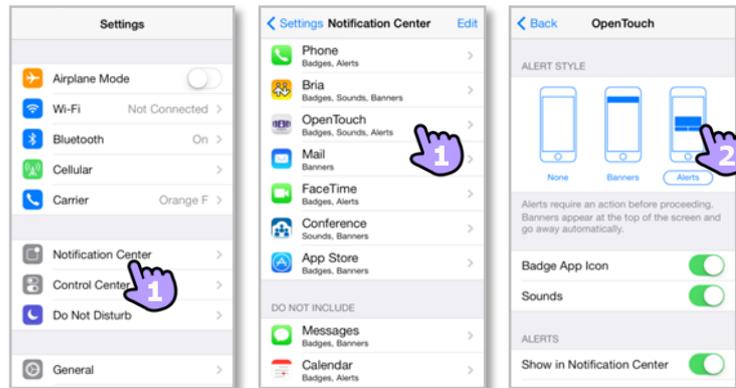




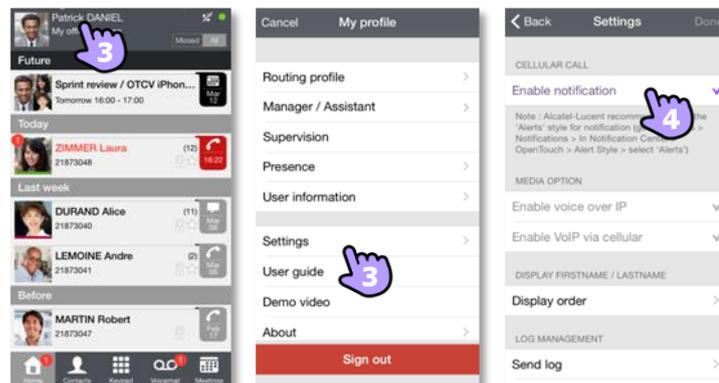
## II.2.9 Notifications

We recommend configuring notifications as follows.

1. Open iPhone notification settings for OpenTouch Connection.
2. We recommend using 'alert' style for notifications.



3. Open the OpenTouch® Conversation settings.
4. Ensure that enable notification is checked.

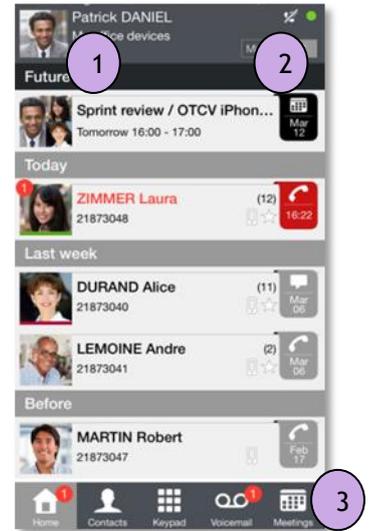




## II.3 Homepage

### II.3.1 Homepage description

- 1 My profile: settings and information about the user.
- 2 Display of all conversation logs.  
Display of missed conversations (filter).
- 3 Tab
  - Conversation wall.  
The number of new events is displayed.
  - Contacts and favorites. Depending on the system configuration, you can manage who can see your presence.
  - Dialer.
  - Voicemail access.  
You have unread voice messages (the number of unread messages is displayed).
  - Meeting (filter).



### II.3.2 Conversation wall (History)

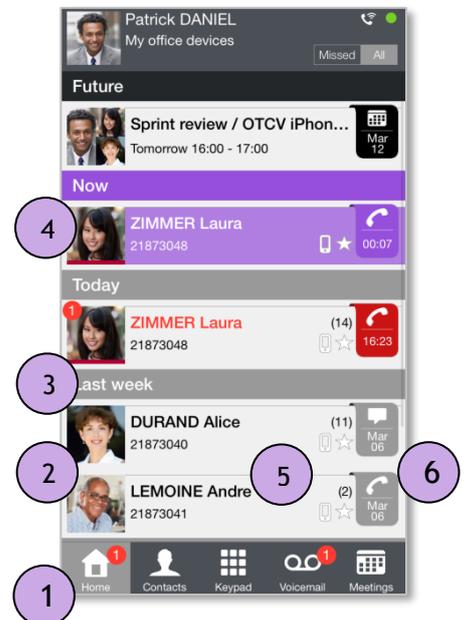
Conversation Wall contains both your history of all conversations and future meetings.

The conversation wall is divided into 4 parts:

- 1 Past conversations.
- 2 Today's conversations.
- 3 Conversation in progress.
- 4 Future meetings.

#### How to understand the conversation wall:

- 5 Each item represents a conversation log by user, by time slot and by the corresponding number of unread events.
- 6 The badge contains the icon associated with the media used during the conversation (phone, voicemail and meeting).
  - Red badge: missed or new events.
  - Purple badge: ongoing conversation.
  - Grey badge: past event.
  - Black badge: future event (meeting).
  - Conversation.
  - Meeting.
  - Instant messages.



: This icon indicates a contact from the local directory of the mobile.

: This icon indicates a favorite contact.

The colored bar under the avatar shows the contact's presence status.



The action on a contact depends on how you select it.

1. Select the badge to direct call the displayed number.
2. If you select an unread event, you open the history card directly.
3. If you select a read event, you put your contact on the stage.
4. To display new missed calls only, select the appropriate filter or tap on the conversation wall icon.



### II.3.2.1 To acknowledge a missed call

If an item is marked as a missed event, you can acknowledge the event. A conversation log is acknowledged if all events for that item are acknowledged.

1. Swipe right on the item.
2. Acknowledge the event.

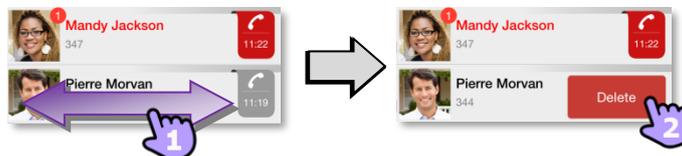


A single event is automatically acknowledged when consulting.

### II.3.2.2 To delete one conversation log:

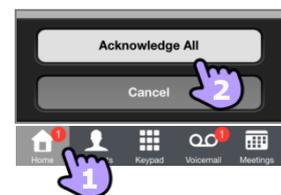
You can delete a conversation log if it is acknowledged.

1. Swipe right or left on the item.
2. Delete the conversation log.



### II.3.2.3 To acknowledge all missed calls

1. Press the home page icon.
2. Acknowledge all missed calls.  
Confirm the acknowledgement of all missed calls.

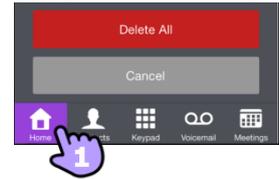




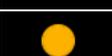
### II.3.2.4 To delete all conversations in the wall

You can delete all conversations if all events are acknowledged.

1.  Press the home page icon.
2. Delete all conversations.
3. Confirm the deletion.



### II.3.3 Status icons

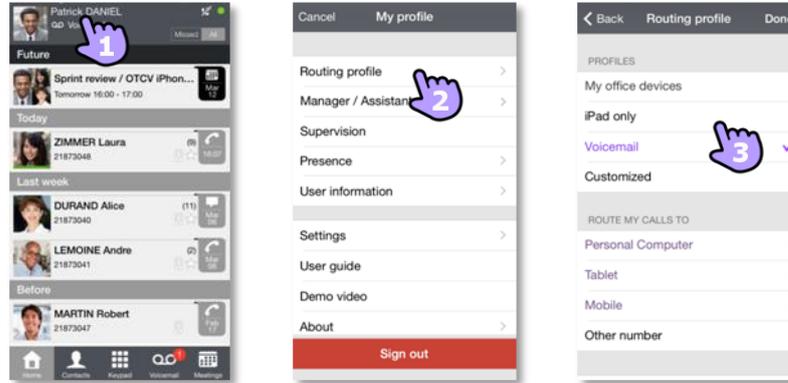
Application is connected and fully available.	
Application is disconnected. The application does not display any new event. You cannot access any of the services.	
Application is connected but some services are not accessible.	
Call in progress.	
Missed calls.	
new voice message(s).	
Next meeting(s).	
Manager / Assistant (call delegation activated).	
Supervision activated (your business phone is supervised).	
Voice over IP activated.	
Voice over IP deactivated.	
Consult the notification bar to identify the issue.	
Selected routing profile with the mobile has no ringing on incoming calls.	



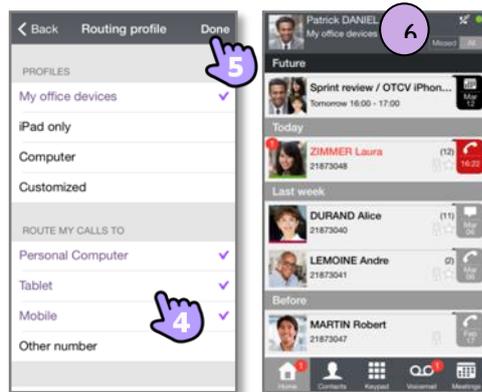
## II.4 Call Routing

### II.4.1.1 Select your routing profile

1. Open your OpenTouch profile.
2. Open the routing profile management.
3. Select a profile... >> Details of the selected profile are displayed just below.



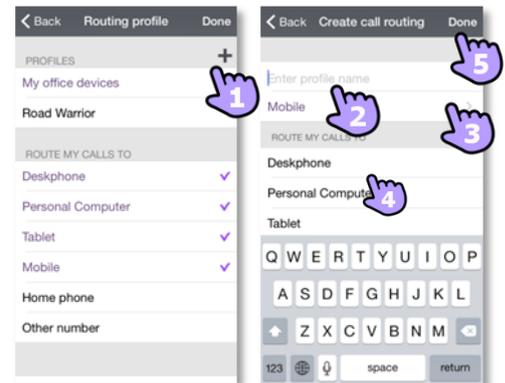
4. You can customize a selected profile.  
Select which devices will ring when you receive an incoming call.
5. Apply.
6. The active routing profile is displayed in the user banner.



 If you selected a routing profile with mobile not ringing, a specific status icon is displayed.

### II.4.1.2 Create a new profile

1.  Edit the new routing profile.
2. Enter name of the new profile.
3. Select which device will be used to make your calls.
4. Select which devices will ring when you receive an incoming call.
5. Create the new profile. The new profile is displayed on the list of routing profiles.

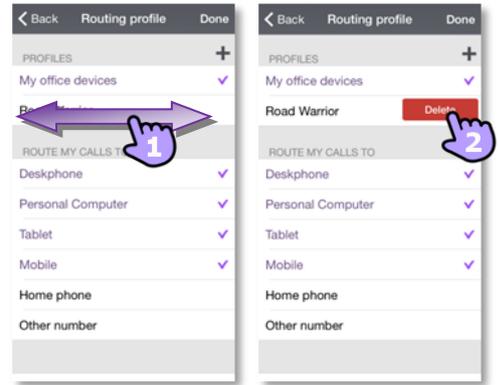




If you create a routing profile where you define to dial from an other device than your mobile, a warning is displayed.

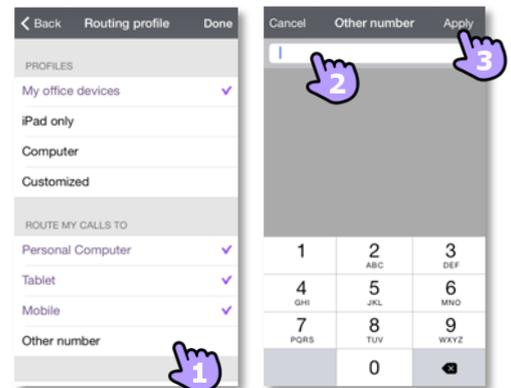
### II.4.1.3 Delete a profile

1. Swipe right or left on the item.
2. Delete the profile.



### II.4.1.4 Define numbers

1. Other number.
2. Enter a phone number then apply.
3. Apply.



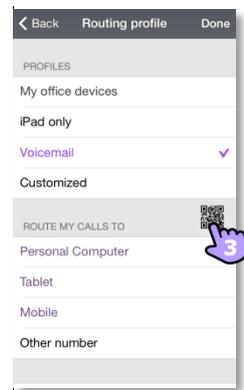
### II.4.2 Change routing profile via QR code

You can modify your current ringing call routing profile with any internal deskphone which is prepared with QRcode. One hour after the routing change, the application will prompt the user to keep this configuration or get back to the initial routing state.



You are facing a QR code of the internal deskphone.

1. Open your OpenTouch profile.
2. Open the routing profile management.
3.  Define the new internal number by scanning the QR code
4. Apply.  
Your incoming calls will ring on this new deskphone.





## II.5 Presence

The colored bar under the avatar shows the contact's presence status.



Available



Busy



Be right back

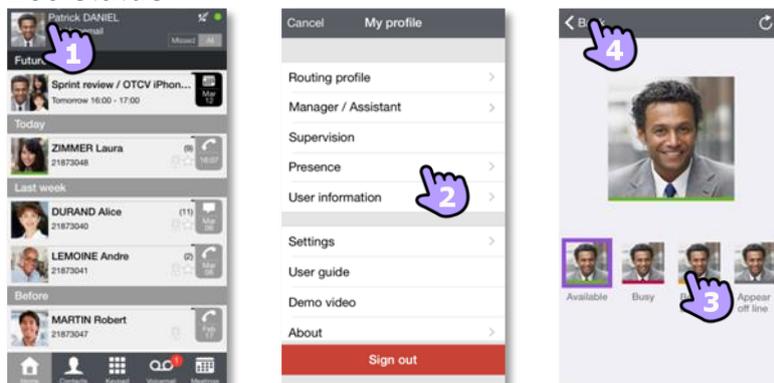


Appear Offline

The OpenTouch Conversation presence status of your contact can be augmented with the Outlook calendar presence (Exchange – depending on the system). The calendar presence of your favorite contact is displayed in the contact card when she/he is in an Exchange meeting with status Free, Working Elsewhere or Tentative so that I know if I can call her/him.

Depending on the system configuration, you can manage who can see your presence (See: Manage your favorites, followers or blacklist).

### Change your presence status



1. Open your OpenTouch profile.
2. Access to the presence feature.
3. Change your presence status.
4. Apply.



## II.6 Contact card

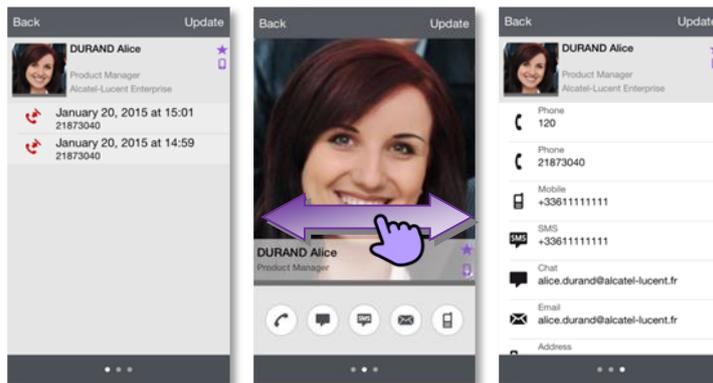
A contact card represents a person.

Open a contact card by selecting a contact in the conversation Wall or in your favorites.



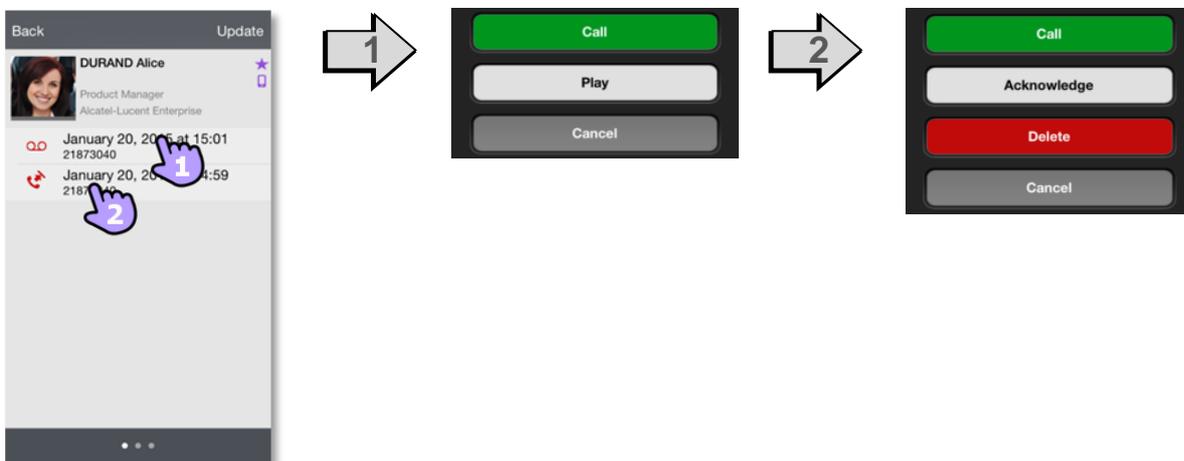
A card contains 3 pages.

- Page 1 is the conversation history with this contact.
- Page 2 is the contact on the stage. The default number used to make a call is the business number.  
The color bar under the photo shows your contact's presence status (Available, Be right back, Busy, Appear Offline). The Microsoft Outlook calendar presence (Exchange) of a favorite contact, when available, is displayed in this page (depending on the configuration of the system and the settings of your contact account).
- Page 3 is the contact details.
- Swipe right and left to navigate between the 3 pages.



**From the conversation history page:**

1. you can play a voicemail or call the originator of the voicemail
2. you can acknowledge or delete an event or call the contact

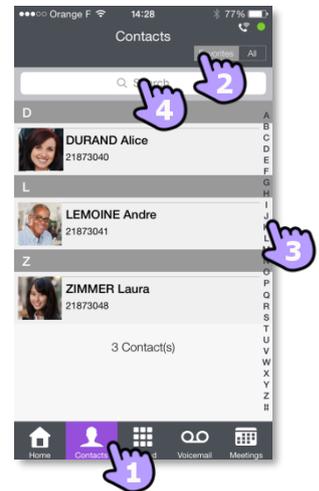




## II.7 Contacts and favorites

Favorites give you faster access to your preferred contacts. A favorite contact is a typically a corporate colleague whose real-time presence you can see.

-  Open your contact tab.  
Your favorite contacts are displayed.  
Favorites give you faster access to your preferred contacts.
- A favorite contact is indicated by an asterisk .
- To display all your contacts or just your favorites, select the corresponding filter.
- Contacts are sorted alphabetically. Select a letter to display contacts whose name starts with the selected letter.
- Search for a contact in your local contacts or in a corporate look-up by using the search interface (See Search a contact).



The contact tab also includes some temporary entries (corporate look-ups, incoming or outgoing calls) thanks to a local cache mechanism. This cache mechanism is cleared when you exit the application.

### II.7.1 Add a favorite contact

The contextual menu displays the feature available on your system.

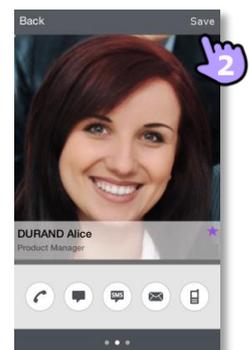
- Open a contact's card.
-  Open the contextual menu.
- Add the contact to your favorites list.

Use the same procedure to remove a contact from your favorites. The contact is not deleted.



### II.7.2 Add a contact to your local directory

- Open a contact's card.
- If the contact is not in your local directory, you can add it.



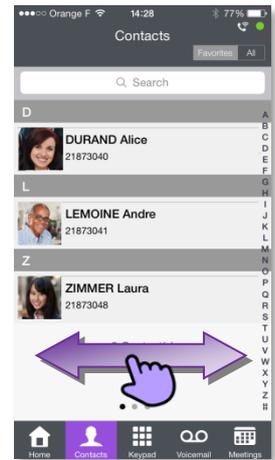


### II.7.3 Manage your favorites, followers or blacklist

The visibility of this feature depends on the system configuration managed by your administrator. If the 'Privacy' option is enabled in your system, you can manage favorite contacts who can see your presence and can start a collaboration session as instant message.



Open your contact tab. Select the favorites filter. The favorites tab contains 3 pages: "Contacts", "Followers", "Blacklist". Swipe right and left to navigate between the 3 pages.



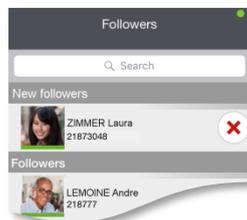
- A contact is a favorite. All favorite contacts are listed in the tab: "Contacts". If your favorite is a corporate colleague, you can see his or her real-time presence. You can start a collaboration session as an instant message.
- A follower is a corporate colleague who has added you as favorite and can see your real-time presence. He or she can start a collaboration session as an instant message. All followers are listed in the tab: "Followers". At any time, you can discard a follower.
- A blacklisted contact is a corporate colleague who has added you as favorite but he or she cannot see your real-time presence because you don't accept him or her as a follower. A blacklisted contact sees your presence as offline and cannot start any collaboration session with you. An instant message will be sent as an offline message. All blacklisted contacts are listed in the tab: "Blacklist".

Contact your administrator for more information.

#### II.7.3.1 Add a contact as favorite

When you tag a contact as favorite, he or she is added to the list of your favorites and a notification as follower is sent to the contact. He or she is added to the list of your favorites. You can see his or her real-time presence unless he or she decides to add you to the blocked contact list.

#### II.7.3.2 Accept or reject a new follower request



Swipe right or left until you reach the page: "Followers". A contact wants to add you to his or her list of favorites. You receive his or her notification as a 'follower' request. Each new 'Follower' request is displayed at the top of the tab: "Followers" (In the section: "New followers").

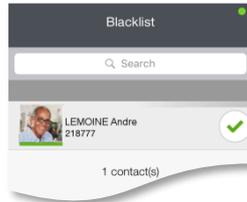
	Block the contact. The contact is placed in the 'Blacklist' list, sees your presence as offline and cannot start any collaboration session with you.
Accept new followers	When you exit the 'Followers' tab, you accept all new followers to see your real-time presence. A warning is displayed before acceptance. Contacts are added to your list of followers.



You can block the contact by opening the contact card:

- Open a contact's card.
-  Open the contextual menu.
- Add the contact to the blacklist.

### II.7.3.3 Unblock a contact



Swipe right or left until you reach the page: “Blacklist”.  
All blocked contacts are listed in the tab: “Blacklist”.



Unblock the corresponding contact. The contact is placed in the 'Followers' list and sees your real-time presence.

You can unblock the contact by opening the contact card:

- Open a contact's card.
-  Open the contextual menu.
- Remove the contact from the blacklist. The contact is placed in the 'Followers' list and sees your real-time presence.



## II.8 Visual Voice mail



1. You have unread voice messages (the number of unread messages is displayed). Open your visual voicemail. All read and unread messages are displayed. If you have one or more unread messages, the visual voicemail tab is automatically opened when you log in to the application.
2.  Select the message to listen to.
3. From the selected message you can:
  - Move the cursor along the play bar to go forward or backward in the message.
  - Pause or resume the message.
  - Activate/deactivate loudspeaker.
4.  Customize your voice mail.



### To delete a message

1. Swipe right or left on the item.
2. Delete the message.  
You cannot delete an unread message.



The Voice mail tab is not visible when a voicemail box has not been created for the end-user.

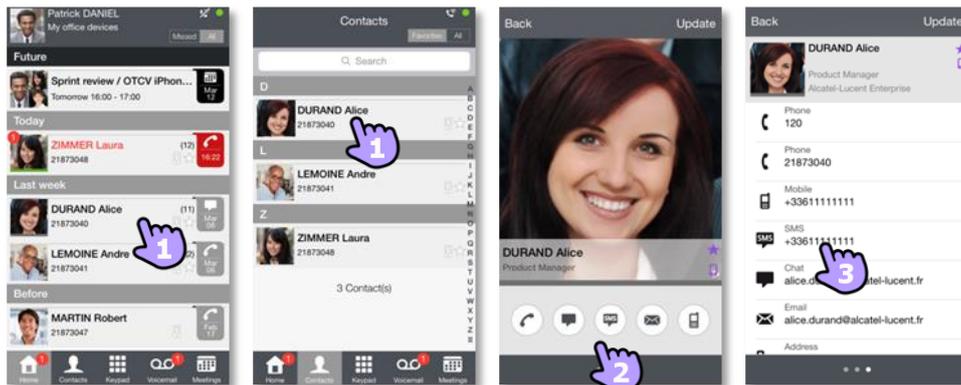


## II.9 Conversation

Actions available depend on the type of conversation and system. If an action is not available, the icon is grayed.

### II.9.1 Set up a conversation with a contact

- You can make a call from the conversation wall, visual voicemail tab, instant messaging tab or a scheduled meeting, if available on your system.
- You can make a call from a search on your local contacts or from a corporate look-up.
- You can make a call from the contact card (details or history).



How to set up a conversation with a contact

1. Call directly using the displayed phone number.
2. Set up different types of conversation (if available).
3. Call using a specific phone number from the contact card.

### II.9.2 Make a conversation by entering a number

1. Open the keypad.
2. Enter your caller's number.
3.  Make the call.



### II.9.3 Make a private call

By default, you make business call with the OpenTouch Conversation. But you can make private call. In this case, you call your contact without going through your company telephone system.

- Long press on the phone number allows you to make a private call.

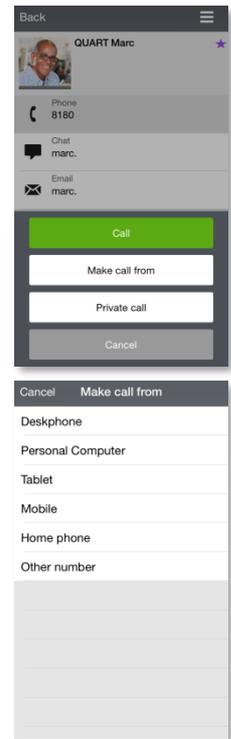


## II.9.4 Dial from another device (one-shot)

This feature provides the capability to launch a single call from selected device. When the conversation is ended, the routing profile automatically returns to its previous state. This is particularly useful in case of very bad cellular network coverage (both audio and data unavailable) or use of a meeting room deskphone for more call confort.

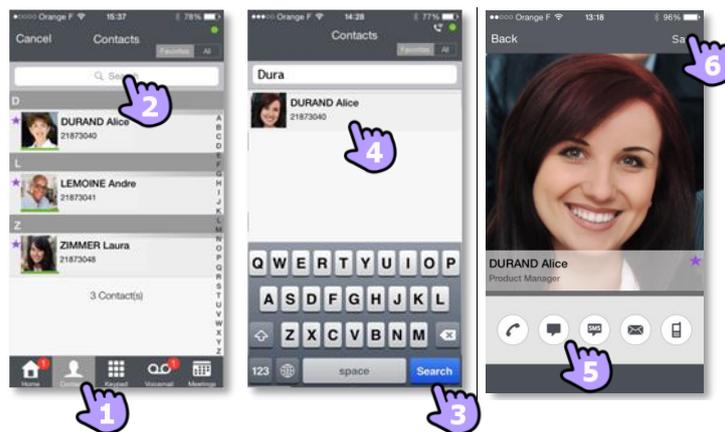
- Long press on the phone number to call
- *Make call from*
- Select the device in the list or define another number.

The device list for selection depends on the endpoints registered by the system administrator.



## II.9.5 Search a contact

1. Open your contact tab.
2. Enter the name of your contact.  
Search is immediately done on local contacts (predictive search). You can base your search on 2 strings for better results.
3. To perform a corporate look-up, select the specific search button.
4. From the search result, select the contact you are searching for.
5. Call your caller.
6. If the contact is not in your local directory, you can save them as a new local contact.



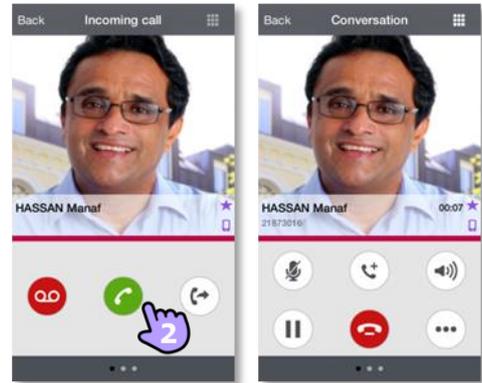


### II.9.6 Receiving a conversation (VoIP or Cellular)

Depending on your connection mode (VoIP or Cellular), you can answer a call in the following ways:

#### II.9.6.1 VoIP mode

1. Call is presented directly in the OpenTouch Conversation application (i.e. not the native dialer).
2. Answer the call.
3. You are in conversation.



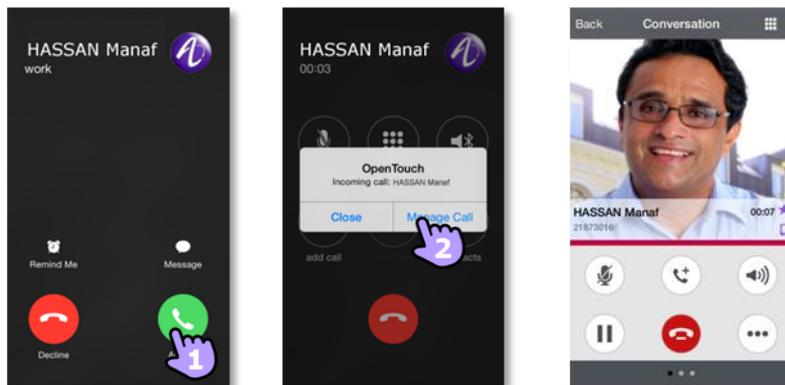
Answer the call.	
Forward an incoming call to business voice mail.	
Decline the call with an instant message.	
Transfer the call to another device or number. Select the destination of the transfer: one of your office devices or a pre-defined number or enter another number.	

If you receive a call while your phone is locked, a pop-up is displayed on the page. Slide and enter your PIN code to take the call and follow the instructions as described in this section.

#### II.9.6.2 Cellular mode

Call is presented in the native dialer (Apple constraint).

1. Answer the call.
2. A pop-up notification allows you to decide whether you want to manage the call in the OpenTouch application or not.  
You are in conversation.



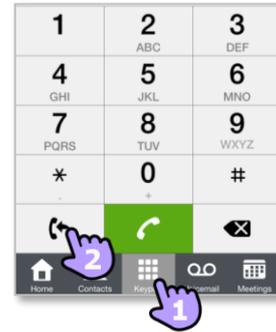
If you receive a call while your phone is locked, a pop-up is displayed on the page. Slide to take the call and follow the instructions described in this section.



### II.9.7 Get your active call started on another device

You set up a call from another device. You need to get this call on your mobile.

1.  Open the keypad.
2.  Select the ' get call ' icon.

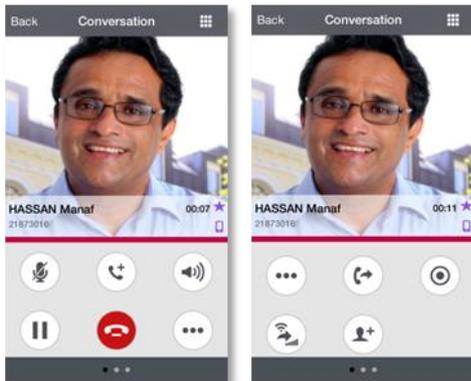


## II.10 During conversation

The actions you can perform during a conversation depends on the connection mode (VoIP or Cellular) and the type of conversation. If there are more than six icons displayed, swipe down to access other available actions

### II.10.1 Screen description

You are in conversation with one contact.



You are in a call with two contacts (hold or conference).



### II.10.2 Leave the conference (the call is still active with the other participants) / Switching between two calls / Transfer call to your contact on hold / Setting up a conference / Send DTMF

Navigates between action pages when there are more than six available actions.	
End the active call. Leave the conference (the call is still active with the other participants).	
Add a participant to the conversation.	
Put the distant on hold.	
Recover the call on hold:	
Transfer the call to another pre-defined phone number(s) (colleague, home, ...).	



Mute/un-mute the conversation - VoIP mode only.	
Activate/deactivate loudspeaker - VoIP mode only.	
Display active or on-hold calls by swiping right or left.	
Switching between two calls.	
Transfer call to your contact on hold.	
Setting up a conference.	
List of conference participants or meeting details.	
End all conversations.	
During the conversation, you can check information by consulting the Conversation Wall. Select the current conversation in the Conversation Wall to go back to the conversation screen.	
Send DTMF.	
Record/Stop recording the conversation. This icon is displayed when recording.	

### II.10.3 Receiving a second call - VoIP mode (according system configuration)

During a conversation, another person is trying to call you » Name or no. of the caller displayed for 3 seconds.

You are alerted by a notify ringtone (native notify ringtone defined in iPhone settings).

Answer the call. The first call is on hold.	
Forward an incoming call to voice mail.	
Decline the call with an instant message.	
Transfer the call to another device or number. Select the destination of the transfer: one of your office devices or a pre-defined number or enter another number.	

### II.10.4 Audio media switch from your iPhone to any deskphone via QR code

When you are in conversation, you can switch the active audio media from your iPhone to any internal deskphone prepared with QRcode. You can find a QR code in a meeting room for example. You can use this feature to isolate you in a meeting room. When the conversation is ended, the routing profile automatically returns to its previous state.



- Select the 'Divert incoming call' icon, then scan the QR code.



## II.11 Instant messages

### II.11.1 Start an instant message

An instant message is a type of conversation which offers real-time text transmission with your contact.

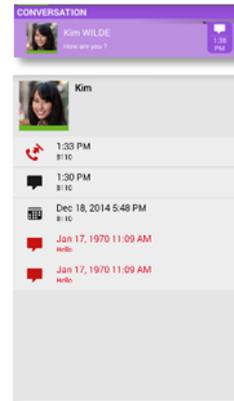
You start an instant message like other conversation from a contact card.



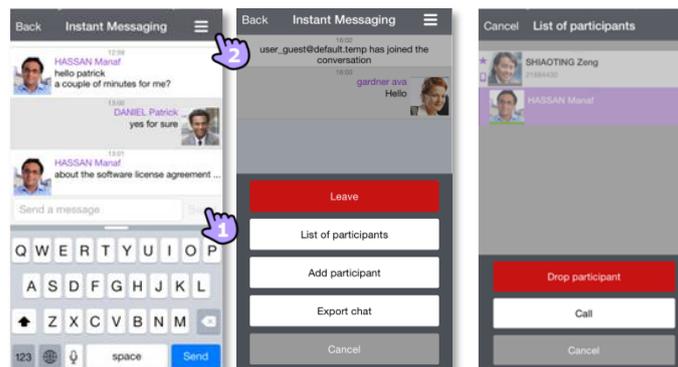
### II.11.2 Receive an instant message

If you are online, you receive instant messages on the Wall.

If you are offline, you receive a missed event in the wall. Open the history of your contact to see the missed instant message.



### II.11.3 During conversation



1. Send message.

2.  Open the contextual menu

- Leave the conversation
- Display the list of participants.  
From the list you can also open the contact card of a participant. Call the selected participant (audio answer). Drop the selected participant.
- Add a participant to the conversation.
- Export the text of the conversation.  
You can export the text of a conversation, to copy it into an email for example. The content of the conversation is copied into the clipboard. Paste the text into another application like email (long press on a text box).

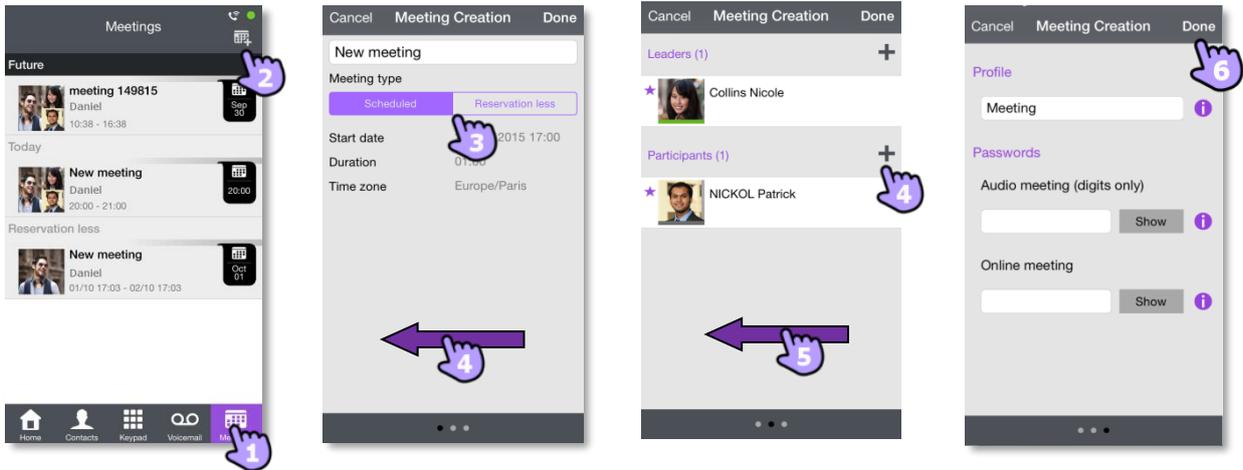
From a group chat, if you want a private chat with one participant, you need to create a new IM session with only this participant.

Instant messaging feature can be deactivated by administrator if your system is using a third party instant messaging server.



## II.12 Meeting

### II.12.1 Create a meeting



1.  Select the meeting tab.
2.  Create a new meeting.
3. Select the type of meeting (scheduled or reservation less) and fill in the various appointment fields.
4. Swipe left to manage leaders and participants of the meeting.
  -  Add a new leader/participant.  
A meeting leader can add or remove a participant, share a document, and cancel the meeting (depending on the OTC client).
  - Remove a participant by a long press on it.
5. Swipe left to manage the profile and password for the meeting.
 

**Choose a predefined profile for the meeting:**

  - Meeting: use for interactive business meetings. All licensed features are available
  - Webinar: use for a Web presentation (large events). Participants only hear and see the Web presentation of leaders
  - Training: use for a teacher-student scenario. All licensed features are available. The session ends when the teacher hangs up (leader)
  - Conference call: use for a voice only conference.

**Secure access to the meeting**

  - You can define a password for an audio meeting (digits only). In this case, an external user has to enter the password to join the audio meeting
  - You can define a password for an online meeting. In this case, an external user has to enter the password to join the web meeting.

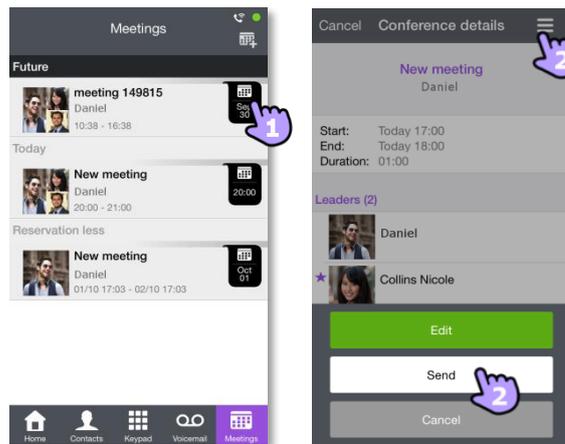
Depending on the system configuration, you may need to follow a password policy ( consult the password policy).
6. Confirm the meeting.

Scheduled meetings and non-reservation meetings are sorted by date in two separate sections.



## II.12.2 Consult meeting list

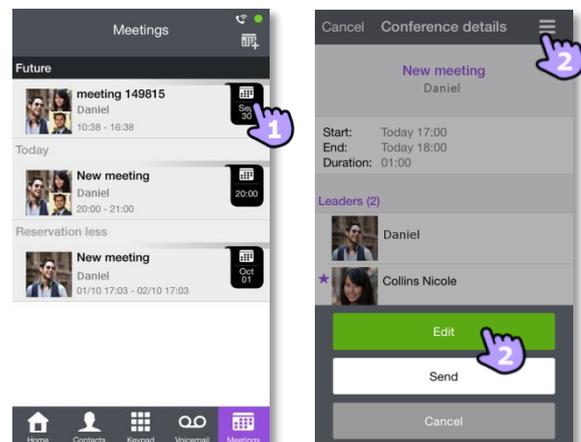
Future scheduled meetings are displayed on the conversation wall.



-  1. Open the meeting details from the conversation wall or the meeting tab. Subject, start and end dates, duration, recurrence if any, owner, participants (with leader and participant information), calling number and SIP URI information, Access code and password (optional) are displayed in this page. The URI is the network identifier of your caller's telephone. Numbers and SIP URI can be used to join the meeting.
-  2. From this page, you can send an email containing all the information needed to join the meeting. A pop-up about leader-access-code security is displayed.

## II.12.3 Modify a future meeting

-  1. Open the meeting details from the conversation wall or the meeting tab.
-  2. Edit the meeting to modify it.

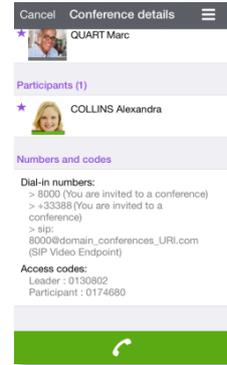




### II.12.4 Start meeting

The badge becomes purple five minutes before the conference starts. There are 3 ways to join a live conference:

-  From the conversation wall, select the corresponding badge to join the conference.
-  From the conference details, select the corresponding action at the bottom of the screen.
- From your email client, select the link in the invitation you have received by email.



From another set, dial directly the number or the SIP URI to join the meeting. Enter access code and password if necessary. Follow instructions.

Display the real-time list of participants during conference.



### II.12.5 Delete a future meeting

-  Select the meeting tab.
- Swipe left or right.
- Delete the meeting.



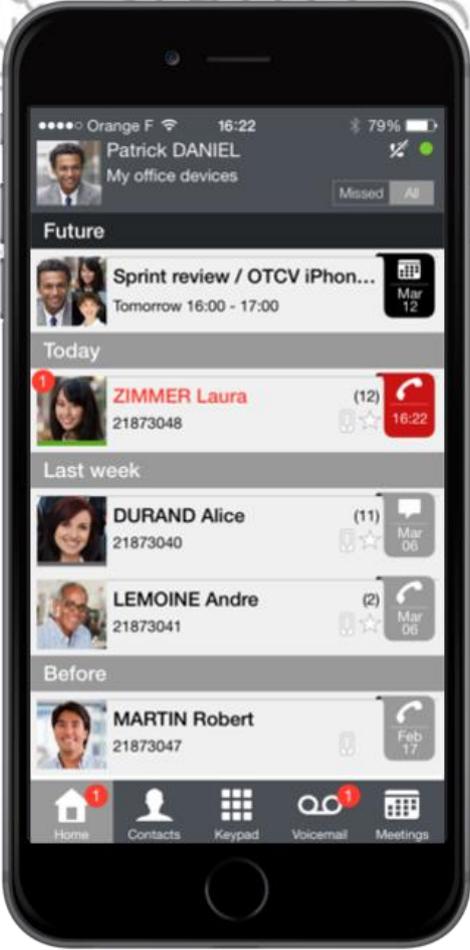
## II.13 Apple Watch

OpenTouch Conversation notifications are pushed on Apple Watch based on Apple native mechanism. By default, your Apple Watch notifications are set up to mirror your iPhone settings. If your iPhone is unlocked, you'll get notifications on your iPhone, instead of your Apple Watch. If your iPhone is locked or asleep, you'll get notifications on your Apple Watch, unless your Apple Watch is locked with your passcode.



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# III - OpenTouch Conversation User Manual for OTBE/OTMS Connection User





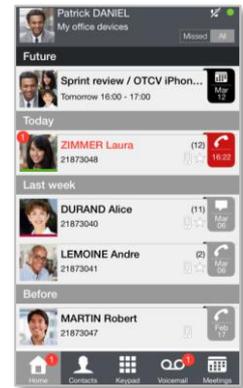
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### III.1 Start OpenTouch® Conversation

#### III.1.1 Start the application

Select the OpenTouch Conversation Icon.



#### III.1.2 Sign in

When you connect for the first time, if you have not configured the connection parameters (OpenTouch settings), a login configuration window is displayed to enter the OpenTouch credentials and OpenTouch server address.

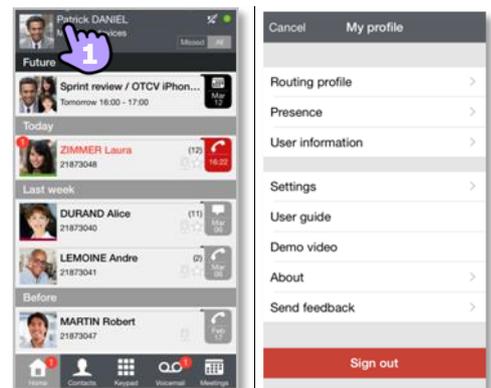
1. Set your connection parameters.
2. Enter your user name (login) / Password (OpenTouch user password).
3. Sign in.
4. In the initial login screen you can see the 'Scan QR Code' button (when necessary, hide the input keyboard). When you press this button, the application scans the QR Code image sent by your system administrator. The application then automatically configures the connection parameters (the number of parameters provided depends on your security policy).



### III.2 Settings

#### III.2.1 My profile

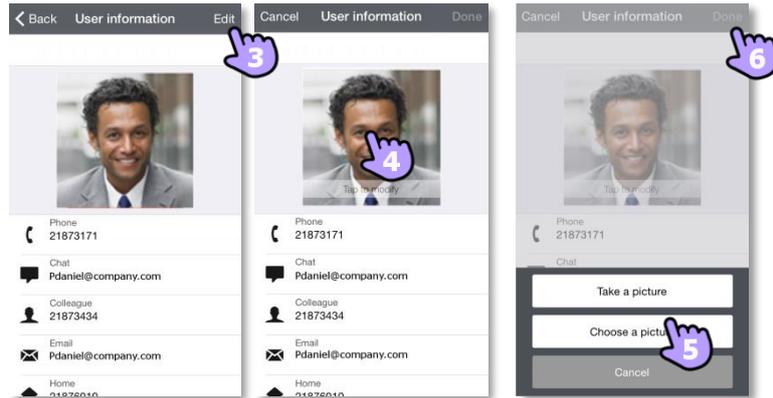
1. Open your OpenTouch profile:
  - Call Routing.
  - Display your user information.
  - Access to settings.
  - Software version.
  - Sign out.





### III.2.2 Change your photo / avatar

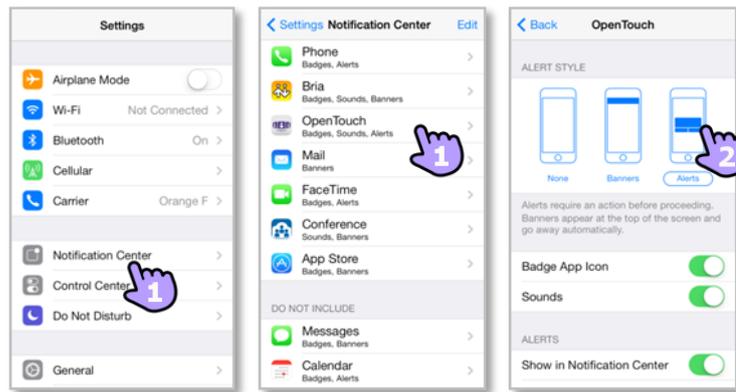
1. Open your OpenTouch profile.
2. Display your user information.
3. Select the edition mode.
4. Tap on your current photo/avatar to change it.
5. Select your new picture.
6. Apply.



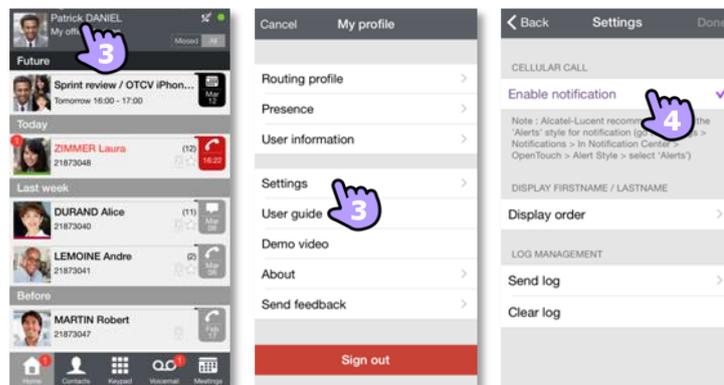
### III.2.3 Notifications

We recommend configuring notifications as follows

1. Open iPhone notification settings for OpenTouch Connection.
2. We recommend using 'alert' style for notifications.



3. Open the OpenTouch® Conversation settings.
4. Ensure that enable notification is checked.

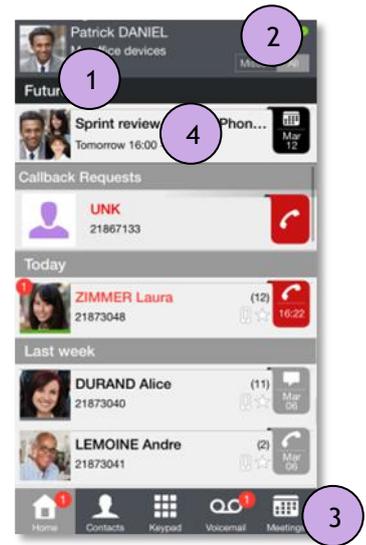




### III.3 Homepage

#### III.3.1 Homepage description

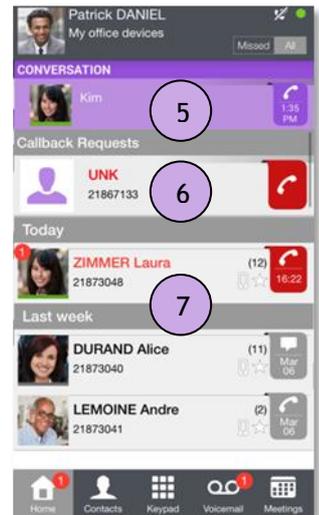
- 1 My profile: settings and information about the user.
- 2 Display of all conversation logs.  
Display of missed conversations (filter).  
Display of callback requests.
- 3 Tab
  - Conversation wall.  
The number of new events is displayed.
  - Contacts and favorites. Depending on the system configuration, you can manage who can see your presence.
  - Dialer.
  - Voicemail access.  
You have unread voice messages (the number of unread messages is displayed).
  - Meeting (filter).



#### III.3.2 Conversation wall (History)

Conversation Wall contains the history of all your conversations. The Wall is divided into 4 parts:

- 4 Future meeting if managed by your system.
- 5 Conversation in progress.
- 6 Callback requests.
- 7 Past conversations.  
All conversations are sorted by date: today, yesterday, this week, last week and before.  
How to understand the conversation wall:



Each item represents a conversation log by user, by time slot and by the corresponding number of unread events.

- Red badge: missed or new events.
- Purple badge: ongoing conversation.
- Grey badge: past event.
- Black badge: future event (meeting).
- Conversation.
- Visual Voice Mail.
- Instant messages.
- Meeting.

: This icon indicates a contact from the local directory of the mobile.

: This icon indicates a favorite contact.

The colored bar under the avatar shows the contact's presence status.

Selected routing profile with the mobile has no ringing on incoming calls.



The action on a contact depends on how you select it.

1. Select the badge to direct call the displayed number.
2. If you select an unread event, you open the history card directly.
3. If you select a read event, you put your contact on the stage.
4. To display new missed calls only, select the appropriate filter or tap on the conversation wall icon.



### III.3.2.1 To acknowledge a missed call

If an item is marked as a missed event, you can acknowledge the event. A conversation log is acknowledged if all events for that item are acknowledged.

1. Swipe right on the item.
2. Acknowledge the event.

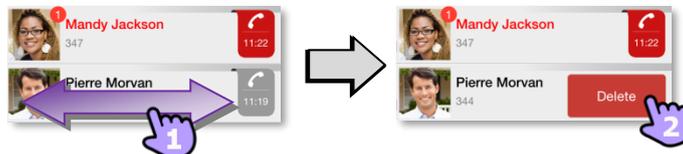


A single event is automatically acknowledged when consulting.

### III.3.2.2 To delete one conversation log:

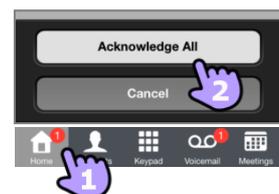
You can delete a conversation log if it is acknowledged.

1. Swipe right or left on the item.
2. Delete the conversation log.



### III.3.2.3 To acknowledge all missed calls

1. Press the home page icon.
  2. Acknowledge all missed calls.
- Confirm the acknowledgement of all missed calls.

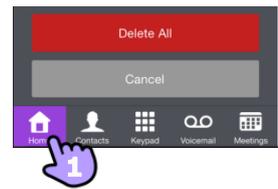




### III.3.2.4 To delete all conversations in the wall

You can delete all conversations if all events are acknowledged.

1.  Press the home page icon.
2. Delete all conversations.
3. Confirm the deletion.



### III.3.3 Status icons

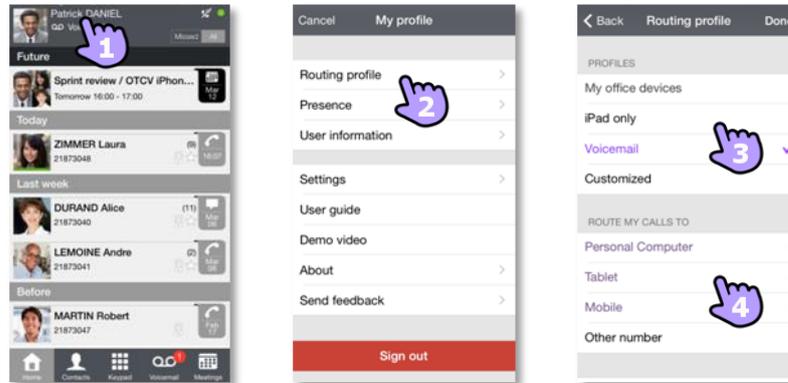
Application is connected and fully available.	
Application is disconnected. The application does not display any new event. You cannot access any of the services.	
Application is connected but some services are not accessible.	
Call in progress.	
Missed calls.	
new voice message(s).	
Next meeting(s).	
Callback requests.	
Selected routing profile with the mobile has no ringing on incoming calls.	



## III.4 Call Routing

### III.4.1 Select your routing profile

The call routing profiles displayed depend on your configuration and installation (main phone and other registered devices).



1. Open your OpenTouch profile.
2. Open the routing profile management.
3. Select a profile... >> Details of the selected profile are displayed just below.
4. Select which devices will ring when you receive an incoming call.

For example, select a profile between:

- Deskphone and mobile.
- Deskphone.
- Home phone and mobile.
- Home phone.
- Other phone and mobile.
- Other phone.

Immediate forward:

- Immediate forward to voicemail.
- Immediate forward to number.
- Immediate forward.



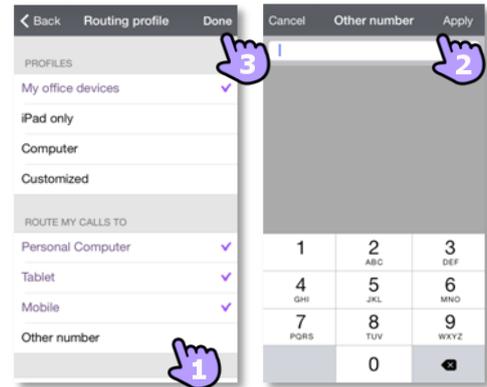
If you selected a routing profile with mobile not ringing, a specific status icon is displayed.

The active routing profile is displayed in the user banner.



### III.4.2 Define numbers

1. Other number.
2. Enter a phone number then apply.
3. Apply.



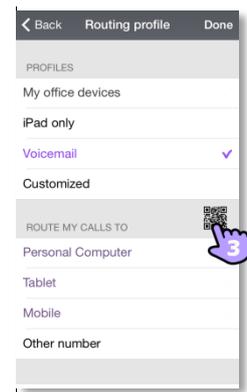
### III.4.3 Change routing profile via QR code

You can modify your current ringing call routing profile with any internal deskphone which is prepared with QRcode. One hour after the routing change, the application will prompt the user to keep this configuration or get back to the initial routing state.



You are facing a QR code of the internal deskphone.

1. Open your OpenTouch profile.
2. Open the routing profile management.
3.  Define the new internal number by scanning the QR code
4. Apply.  
Your incoming calls will ring on this new deskphone.





## III.5 Presence

The colored bar under the avatar shows the contact's presence status.



Available



Busy



Be right back

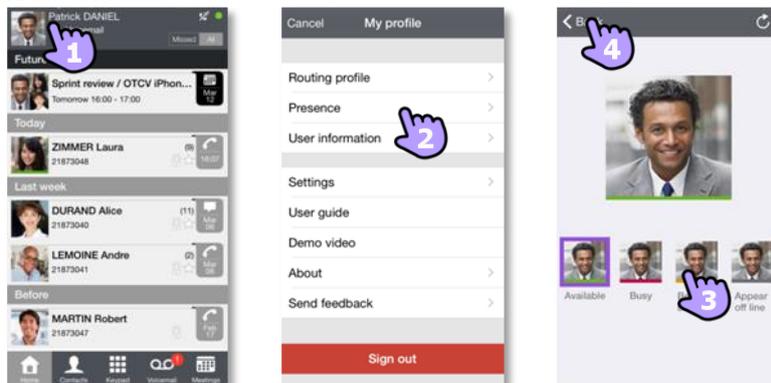


Appear Offline

The OpenTouch Conversation presence status of your contact can be augmented with the Outlook calendar presence (Exchange – depending on the system). The calendar presence of your favorite contact is displayed in the contact card when she/he is in an Exchange meeting with status Free, Working Elsewhere or Tentative so that I know if I can call her/him.

Depending on the system configuration, you can manage who can see your presence (See: Manage your favorites, followers or blacklist).

### Change your presence status



1. Open your OpenTouch profile.
2. Access to the presence feature.
3. Change your presence status.
4. Apply.



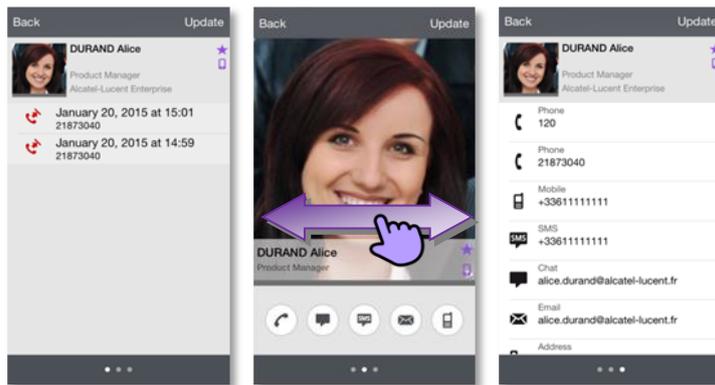
### III.6 Contact card

A contact card represents a person.  
Open a contact card by selecting a contact in the conversation Wall or in your favorites.



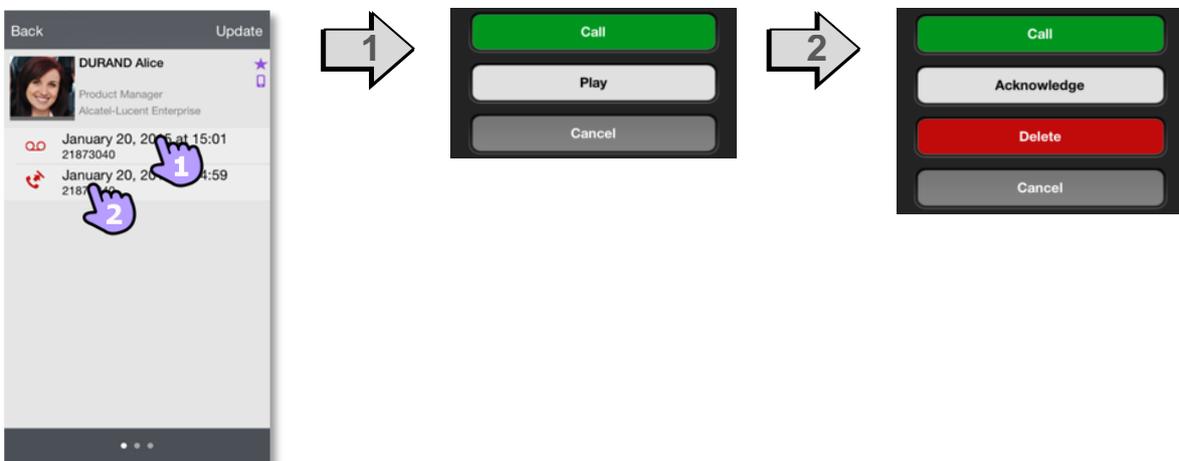
A card contains 3 pages

- Page 1 is the conversation history with this contact.
- Page 2 is the contact on the stage. The default number used to make a call is the business number.  
The color bar under the photo shows your contact's presence status (Available, Be right back, Busy, Appear Offline). The Microsoft Outlook calendar presence (Exchange) of a favorite contact, when available, is displayed in this page (depending on the configuration of the system and the settings of your contact account)
- Page 3 is the contact details.
- Swipe right and left to navigate between the 3 pages.



**From the conversation history page:**

1. you can play a voicemail or call the originator of the voicemail.
2. you can acknowledge or delete an event or call the contact.

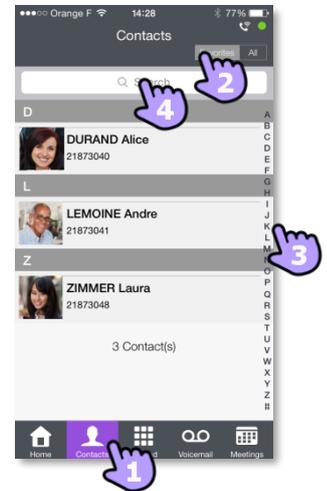




### III.7 Contacts and favorites

Favorites give you faster access to your preferred contacts. A favorite contact is a typically a corporate colleague whose real-time presence you can see.

1.  Open your contact tab.  
Your favorite contacts are displayed.  
Favorites give you faster access to your preferred contacts.  
A favorite contact is indicated by an asterisk .
2. To display all your contacts or just your favorites, select the corresponding filter.
3. Contacts are sorted alphabetically. Select a letter to display contacts whose name starts with the selected letter.  
Search for a contact in your local contacts or in a corporate look-up by using the search interface (See Search a **contact**).



The contact tab also includes some temporary entries (corporate look-ups, incoming or outgoing calls) thanks to a local cache mechanism. This cache mechanism is cleared when you exit the application.

#### III.7.1 Add a favorite contact

The contextual menu displays the feature available on your system.

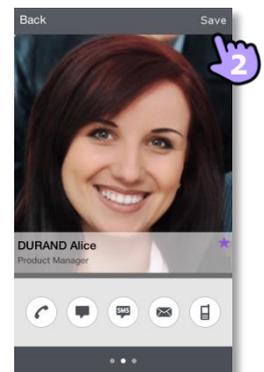
- Open a contact's card.
-  Open the contextual menu.
- Add the contact to your favorites list.

Use the same procedure to remove a contact from your favorites. The contact is not deleted.



#### III.7.2 Add a contact to your local directory

1. Open a contact's card.
2. If the contact is not in your local directory, you can add it.



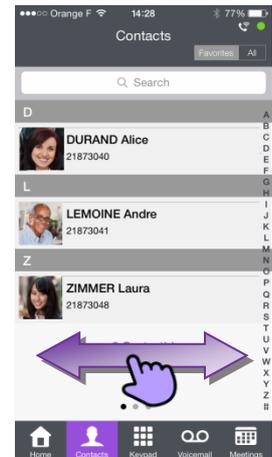


### III.7.3 Manage your favorites, followers or blacklist

The visibility of this feature depends on the system configuration managed by your administrator. If the 'Privacy' option is enabled in your system, you can manage favorite contacts who can see your presence and can start a collaboration session as instant message.



Open your contact tab. Select the favorites filter. The favorites tab contains 3 pages: "Contacts", "Followers", "Blacklist". Swipe right and left to navigate between the 3 pages.



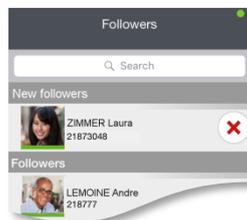
- A contact is a favorite. All favorite contacts are listed in the tab: "Contacts". If your favorite is a corporate colleague, you can see his or her real-time presence. You can start a collaboration session as an instant message.
- A follower is a corporate colleague who has added you as favorite and can see your real-time presence. He or she can start a collaboration session as an instant message. All followers are listed in the tab: "Followers". At any time, you can discard a follower.
- A blacklisted contact is a corporate colleague who has added you as favorite but he or she cannot see your real-time presence because you don't accept him or her as a follower. A blacklisted contact sees your presence as offline and cannot start any collaboration session with you. An instant message will be sent as an offline message. All blacklisted contacts are listed in the tab: "Blacklist".

Contact your administrator for more information.

#### III.7.3.1 Add a contact as favorite

When you tag a contact as favorite, he or she is added to the list of your favorites and a notification as follower is sent to the contact. He or she is added to the list of your favorites. You can see his or her real-time presence unless he or she decides to add you to the blocked contact list.

#### III.7.3.2 Accept or reject a new follower request



Swipe right or left until you reach the page: "Followers". A contact wants to add you to his or her list of favorites. You receive his or her notification as a 'follower' request. Each new 'Follower' request is displayed at the top of the tab: "Followers" (In the section: "New followers").

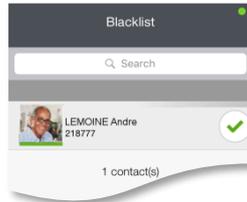
	Block the contact. The contact is placed in the 'Blacklist' list, sees your presence as offline and cannot start any collaboration session with you.
Accept new followers	When you exit the 'Followers' tab, you accept all new followers to see your real-time presence. A warning is displayed before acceptance. Contacts are added to your list of followers.



You can block the contact by opening the contact card:

- Open a contact's card.
-  Open the contextual menu.
- Add the contact to the blacklist.

### III.7.3.3 Unblock a contact



Swipe right or left until you reach the page: “Blacklist”.  
All blocked contacts are listed in the tab: “Blacklist”.



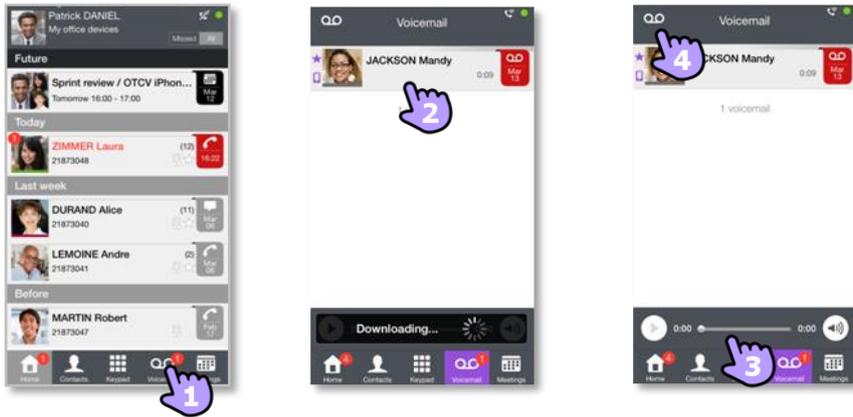
Unblock the corresponding contact. The contact is placed in the 'Followers' list and sees your real-time presence.

You can unblock the contact by opening the contact card:

- Open a contact's card.
-  Open the contextual menu.
- Remove the contact from the blacklist. The contact is placed in the 'Followers' list and sees your real-time presence.



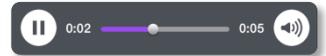
### III.8 Visual Voice mail



1. You have unread voice messages (the number of unread messages is displayed). Open your visual voicemail. All read and unread messages are displayed.

If you have one or more unread messages, the visual voicemail tab is automatically opened when you log in to the application.

2.  Select the message to listen to.
3. From the selected message you can:
  - Move the cursor along the play bar to go forward or backward in the message.
  - Pause or resume the message.
  - Activate/deactivate loudspeaker.
4.  Customize your voice mail.



#### To delete a message

1. Swipe right or left on the item.
2. Delete the message.  
You cannot delete an unread message.



The Voice mail tab is not visible when a voicemail box has not been created for the end-user.

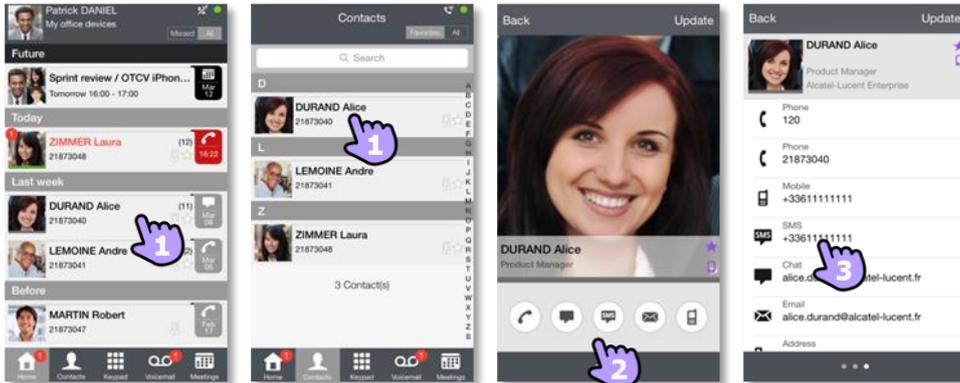


### III.9 Conversation

Actions available depend on the type of conversation and system. If an action is not available, the icon is grayed.

#### III.9.1 Set up a conversation with a contact

- You can make a call from the conversation wall, visual voicemail tab, instant messaging tab or a scheduled meeting, if available on your system.
- You can make a call from a search on your local contacts or from a corporate look-up.
- You can make a call from the contact card (details or history).



How to set up a conversation with a contact

1. Call directly using the displayed phone number.
2. Set up different types of conversation (if available).
3. Call using a specific phone number from the contact card.

#### III.9.2 Make a conversation by entering a number

1. Open the keypad.
2. Enter your caller's number.
3.  Make the call.





### III.9.3 Make a private call

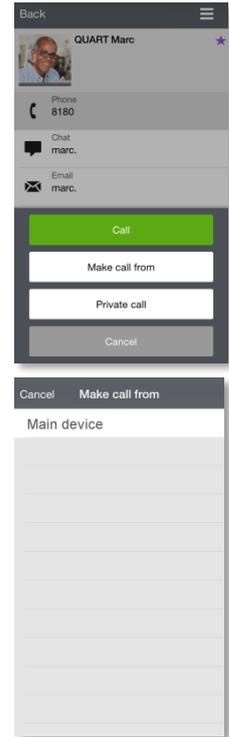
By default, you make business call with the OpenTouch Conversation. But you can make private call. In this case, you call your contact without going through your company telephone system.

- Long press on the phone number allows you to make a private call.

### III.9.4 Dial from another device (one-shot)

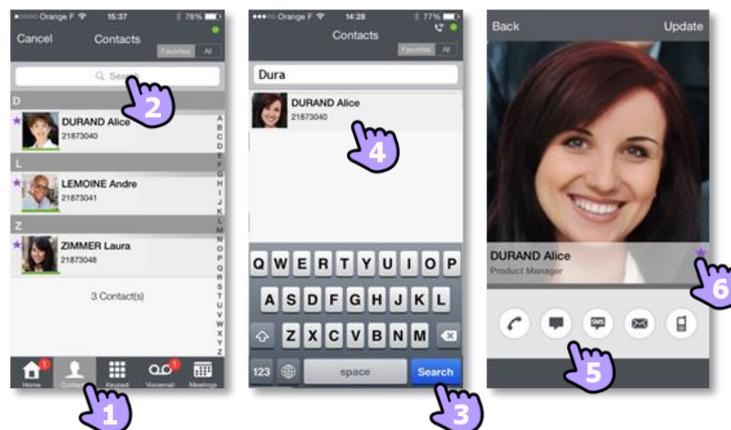
This feature provides the capability to launch a single call from your main device. When the conversation is ended, the routing profile automatically returns to its previous state.

- Long press on the phone number to call
- *Make call from*
- Select the device in the list or define another number.



### III.9.5 Search a contact

1. Open your contact tab.
2. Enter the name of your contact.  
Search is immediately done on local contacts (predictive search). You can base your search on 2 strings for better results.
3. To perform a corporate look-up, select the specific search button.
4. From the search result, select the contact you are searching for.
5. Call your caller.
6. If the contact is not in your local directory, you can save them as a new local contact.

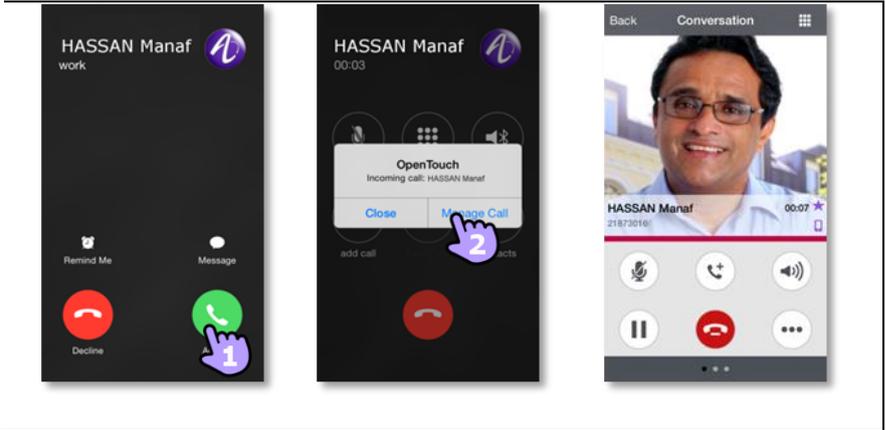




### III.9.6 Receiving a conversation

Call is presented in the native dialer (Apple constraint).

1. Answer the call.
  2. A pop-up notification allows you to decide whether you want to manage the call in the OpenTouch application or not.
- You are in conversation.



Answer the call.	
Forward an incoming call to business voice mail.	
Transfer the call to another device or number. Select the destination of the transfer: one of your office devices or a pre-defined number or enter another number.	

If you receive a call while your phone is locked, a pop-up is displayed on the page. Slide and enter your PIN code to take the call and follow the instructions as described in this section.

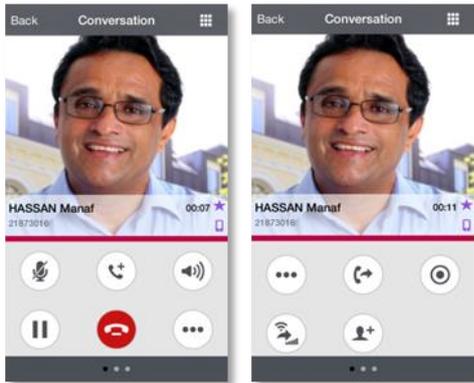


### III.10 During conversation

The actions you can perform during a conversation depends on the connection mode (VoIP or Cellular) and the type of conversation. If there are more than six icons displayed, swipe down to access other available actions.

#### III.10.1 Screen description

You are in conversation with one contact.



You are in a call with two contacts (hold or conference).



#### III.10.2 Leave the conference (the call is still active with the other participants) / Switching between two calls / Transfer call to your contact on hold / Three-party conference / Send DTMF

Navigates between action pages when there are more than six available actions.	
End the active call. Leave the conference (the call is still active with the other participants).	
Add a participant to the conversation.	
Put the distant on hold.	
Recover the call on hold:	
Transfer the call to another pre-defined phone number(s) (colleague, home, ...).	
Display active or on-hold calls by swiping right or left.	
Switching between two calls.	
Transfer call to your contact on hold.	
Setting up a conference (Three-party conference).	
List of conference participants or meeting details.	



End all conversations.	
During the conversation, you can check information by consulting the Conversation Wall. Select the current conversation in the Conversation Wall to go back to the conversation screen.	
Send DTMF.	
Record/Stop recording the conversation.  This icon is displayed when recording.	

### III.10.3 Receiving a second call (according system configuration)

During a conversation, another person is trying to call you >> Name or no. of the caller displayed for 3 seconds.

You are alerted by a notify ringtone (native notify ringtone defined in iPhone settings).

Answer the call. The first call is on hold.	
---	---

### III.10.4 Audio media switch from your iPhone to any deskphone via QR code

When you are in conversation, you can switch the active audio media from your iPhone to any internal deskphone prepared with QRcode. You can find a QR code in a meeting room for example. You can use this feature to isolate you in a meeting room. When the conversation is ended, the routing profile automatically returns to its previous state.



-  Select the 'Divert incoming call' icon, then scan the QR code.



## III.11 Instant messages

### III.11.1 Start an instant message

An instant message is a type of conversation which offers real-time text transmission with your contact.

You start an instant message like other conversation from a contact card.



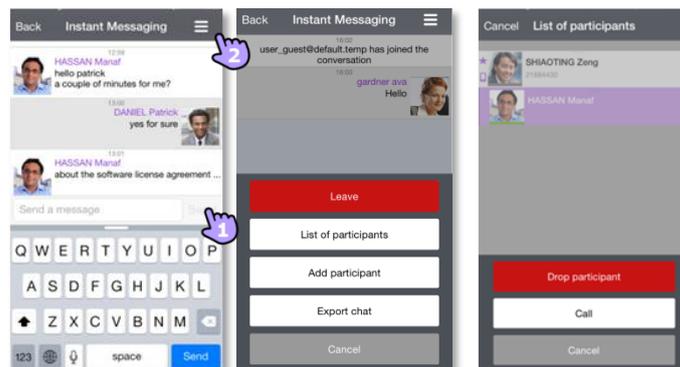
### III.11.2 Receive an instant message

If you are online, you receive instant messages on the Wall.

If you are offline, you receive a missed event in the wall. Open the history of your contact to see the missed instant message.



### III.11.3 During conversation



1. Send message.

2.  Open the contextual menu

- Leave the conversation
- Display the list of participants.  
From the list you can also open the contact card of a participant. Call the selected participant (audio answer). Drop the selected participant.
- Add a participant to the conversation.
- Export the text of the conversation.  
You can export the text of a conversation, to copy it into an email for example. The content of the conversation is copied into the clipboard. Paste the text into another application like email (long press on a text box).

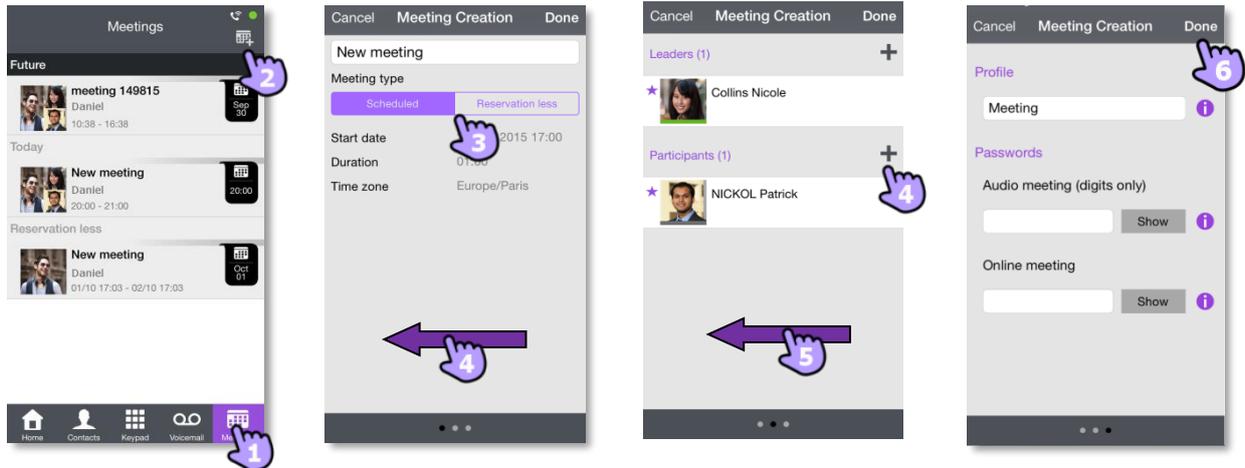
From a group chat, if you want a private chat with one participant, you need to create a new IM session with only this participant.

Instant messaging feature can be deactivated by administrator if your system is using a third party instant messaging server.



## III.12 Meeting

### III.12.1 Create a meeting



1.  Select the meeting tab.
2.  Create a new meeting.
3. Select the type of meeting (scheduled or reservation less) and fill in the various appointment fields.
4. Swipe left to manage leaders and participants of the meeting.
  -  Add a new leader/participant.  
A meeting leader can add or remove a participant, share a document, and cancel the meeting (depending on the OTC client).
  - Remove a participant by a long press on it.
5. Swipe left to manage the profile and password for the meeting.
 

**Choose a predefined profile for the meeting:**

  - Meeting: use for interactive business meetings. All licensed features are available
  - Webinar: use for a Web presentation (large events). Participants only hear and see the Web presentation of leaders
  - Training: use for a teacher-student scenario. All licensed features are available. The session ends when the teacher hangs up (leader)
  - Conference call: use for a voice only conference.

**Secure access to the meeting**

  - You can define a password for an audio meeting (digits only). In this case, an external user has to enter the password to join the audio meeting
  - You can define a password for an online meeting. In this case, an external user has to enter the password to join the web meeting.

Depending on the system configuration, you may need to follow a password policy ( consult the password policy).

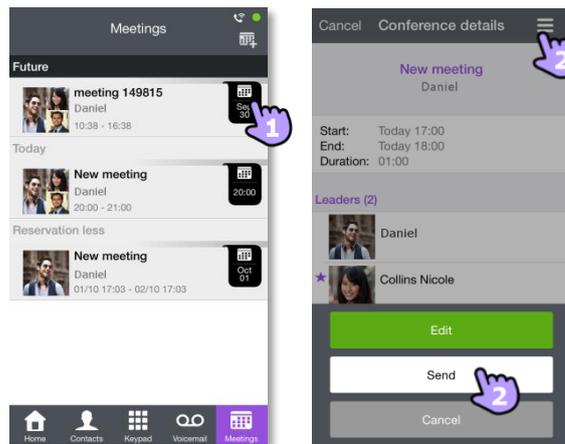
6. Confirm the meeting.

Scheduled meetings and non-reservation meetings are sorted by date in two separate sections.



### III.12.2 Consult meeting list

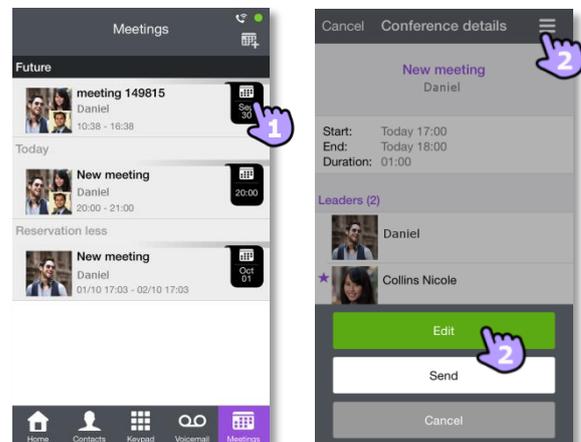
Future scheduled meetings are displayed on the conversation wall.



-  1. Open the meeting details from the conversation wall or the meeting tab. Subject, start and end dates, duration, recurrence if any, owner, participants (with leader and participant information), calling number and SIP URI information, Access code and password (optional) are displayed in this page. The URI is the network identifier of your caller's telephone. Numbers and SIP URI can be used to join the meeting.
-  2. From this page, you can send an email containing all the information needed to join the meeting. A pop-up about leader-access-code security is displayed.

### III.12.3 Modify a future meeting

-  1. Open the meeting details from the conversation wall or the meeting tab.
-  2. Edit the meeting to modify it.

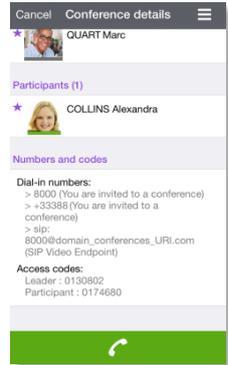




### III.12.4 Start meeting

The badge becomes purple five minutes before the conference starts. There are 3 ways to join a live conference:

-  From the conversation wall, select the corresponding badge to join the conference.
-  From the conference details, select the corresponding action at the bottom of the screen.
- From your email client, select the link in the invitation you have received by email.



From another set, dial directly the number or the SIP URI to join the meeting. Enter access code and password if necessary. Follow instructions.

Display the real-time list of participants during conference.



### III.12.5 Delete a future meeting

-  Select the meeting tab.
- Swipe left or right.
- Delete the meeting.



## III.13 Apple Watch

OpenTouch Conversation notifications are pushed on Apple Watch based on Apple native mechanism. By default, your Apple Watch notifications are set up to mirror your iPhone settings. If your iPhone is unlocked, you'll get notifications on your iPhone, instead of your Apple Watch. If your iPhone is locked or asleep, you'll get notifications on your Apple Watch, unless your Apple Watch is locked with your passcode.



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