# Hosted Services – Chat and SMS/MMS User Guide

The Hosted Services desktop app is designed to be easy to use on your PC and MAC (mid-July release) is made for the end user. Hosted Services administrator functionality can be accessed via the Hosted Services portal. The mobile app for Android and iOS is similar in function to the desktop app with regard to its end-user functionality but also includes some administrator functionality.

All three options include chat among coworkers within the organization. Users with the right permissions can also send/receive SMS text messages and, again with the right permissions, multimedia messages (MMS). The portal, desktop app, and mobile app are synchronized so that messages sent/received in one application are visible in all the apps.
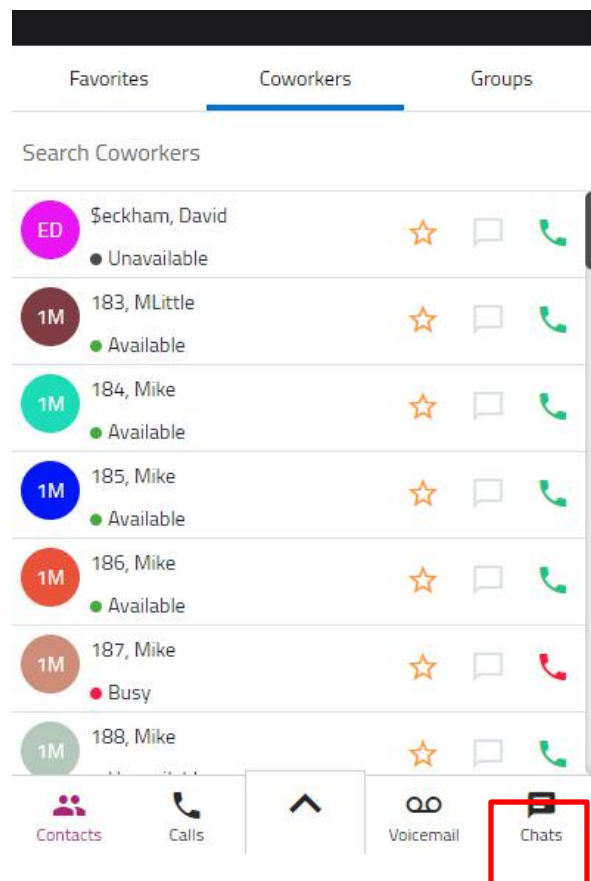
Hosted Services portal Quick Connect
Log into the Hosted Services portal at https://portal.hostedipphonesystem.net with your username and password.

At the dashboard click on the Quick Connect icon in the top right corner.
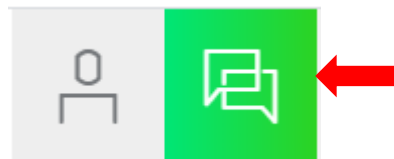
The Quick Connect panel flies out from the right side of your screen. Chat is located at the bottom right.

Hosted Services desktop app (The mobile app is similar in look and function)

Log in with your Hosted Services username and password (same as used to log into the Hosted Services web portal). Once you have logged in, it will remain up and running for your entire workday.

Home Page

Upon login you will land at the home page, where you can see your Favorites, Coworkers and Groups. Chat is located at the bottom right.
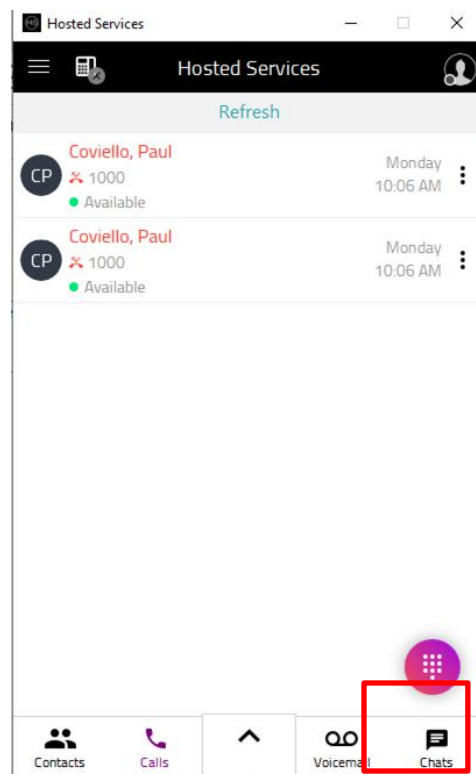
Chat Presence
The status for each of the chat bubble variations is:
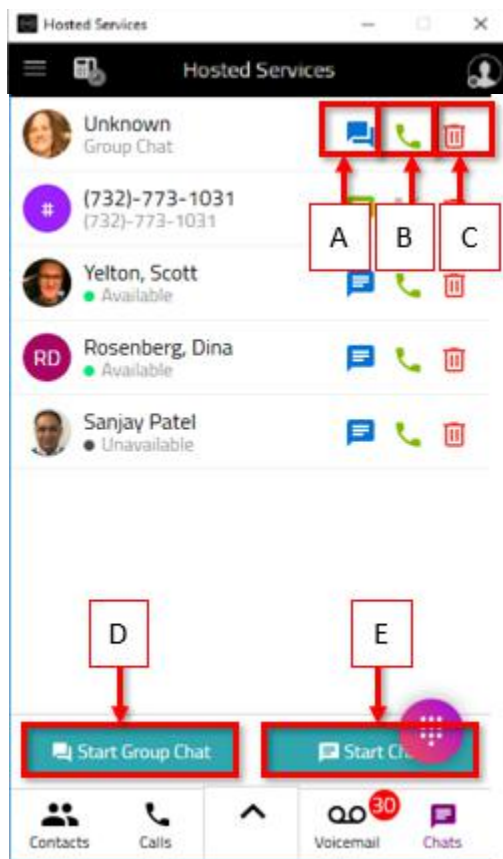Blue filled – available to chat
Grey with a line – offline
Red filled – a chat is awaiting me – from someone who is online
White with a red outline – a chat is awaiting me from someone who is offline

Chat

Click on *Chats* to open the chat panel. Here you can:

   a. Respond to a chat
   b. Call a Hosted Svcs user you are chatting with
   c. Delete the chat
   d. Start a group chat
   e. Start a new chat

Some notes to remember about chat:

Hosted Services customer administrators can request the carrier to completely turn off chat for their entire tenant (they would still have the desktop and mobile app for its other uses).
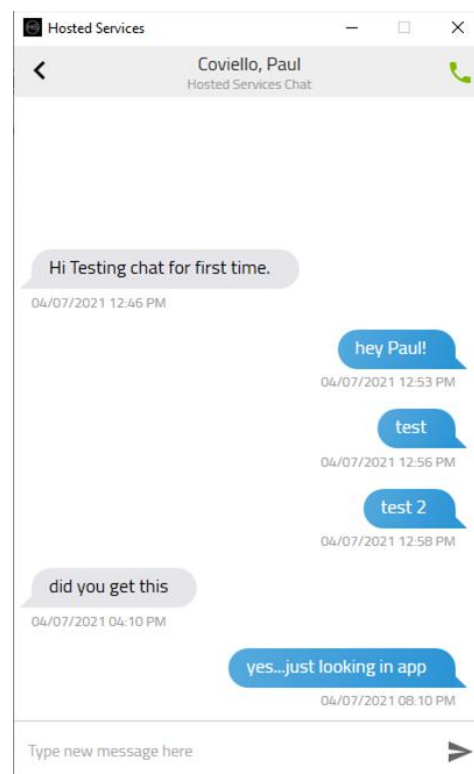
An individual user can remove themselves from chat. In which case they would not participate in chat as a user or within a group.

Chats are kept and are only accessible by the user (not by the carrier and not by Hosted Services Admins). Chats are encrypted.

Chatting with a coworker

Click on *Start Chat* to create a chat conversation with a coworker or click the chat icon next to their record in your Favorites or Coworkers directory.

Type your message in the bottom of the panel and press the send icon. The entire chat conversation is kept and can be reviewed by scrolling up/down.
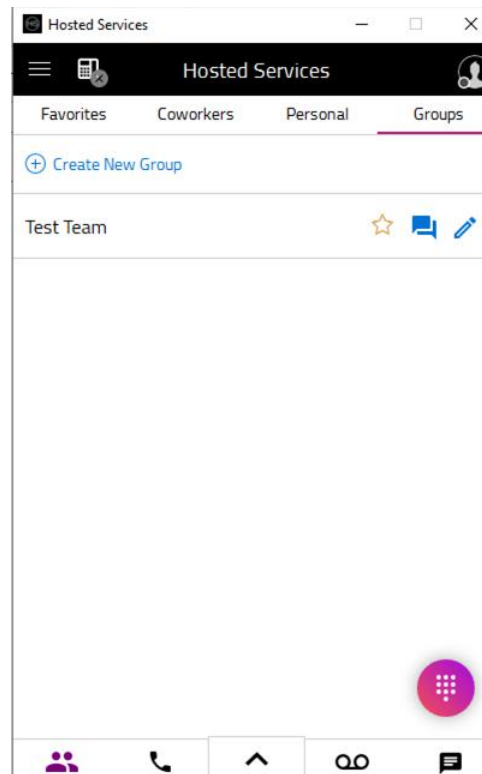
Hosted Services

Coviello, Paul
Hosted Services Chat

Hi Testing chat for first time.
04/07/2021 12:46 PM

hey Paul!
04/07/2021 12:53 PM

test
04/07/2021 12:56 PM

test 2
04/07/2021 12:58 PM

did you get this
04/07/2021 04:10 PM

yes...just looking in app
04/07/2021 08:10 PM

Type new message here

Chat Groups

Click on *Start Group Chat* to create a chat group. The user creating the group becomes the administrator of that group. Hosted Services Administrators cannot change members of groups; only the user who created the group can add or remove group members.

A user can go to this section and mark a group as a favorite, so it appears on the first screen of the app, by filling in the star on that record. They can also see how many groups in which they are a member, whether they are the admin of that group, who is the group admin, who are the group members and have the ability to delete their own groups.

A chat group it represented by a double chat box. Click it to send a chat to the group members. If the double chat box is red there is a chat waiting for you from another group member.


SMS Text

If a user has been granted SMS text permissions by their Hosted Services Administrator, then that user can send SMS messages from their Hosted Services phone number to cell phone numbers and receive messages on their Hosted Services number. It's important to know that SMS text messages originate from the user's Hosted Services phone number and not from their personal cell phone number. Likewise, when a party responds to the SMS text message, they send their reply to the Hosted Services phone number. This helps maintain the privacy of your employees when texting clients and other business associates. Please note that SMS Text by itself does not support sending/receiving multimedia messages (MMS) nor does it support group texting. With the optional MMS service (see below) users can send and receive multimedia messages including images, hyperlinks, and other file types.

SMS messages will appear with a green chat icon, while Hosted Services chats will appear with a blue chat icon.

To send an SMS text, click the SMS chat icon for the contact you wish and type your message in the box on the next screen just as would when chatting with a coworker. Press Enter or the Send icon when done.
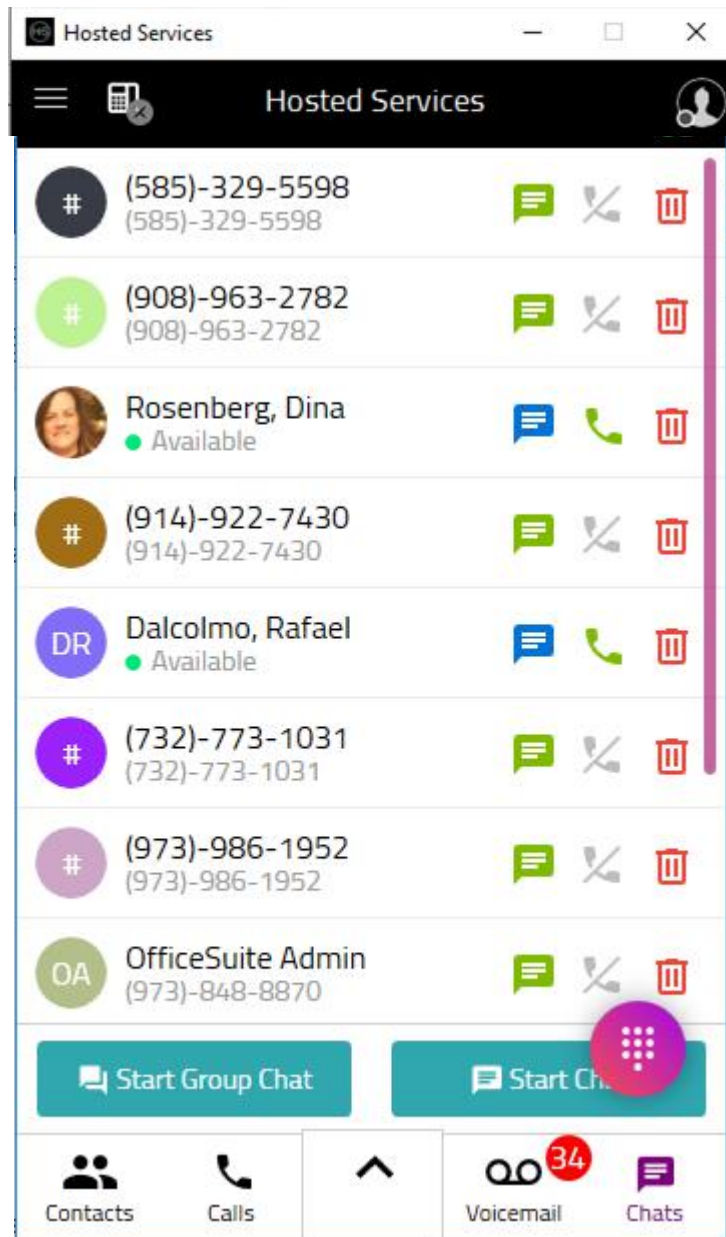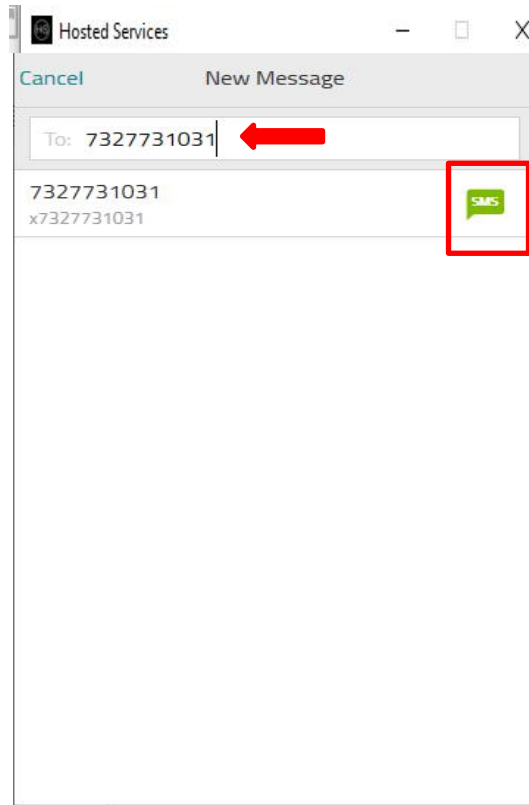
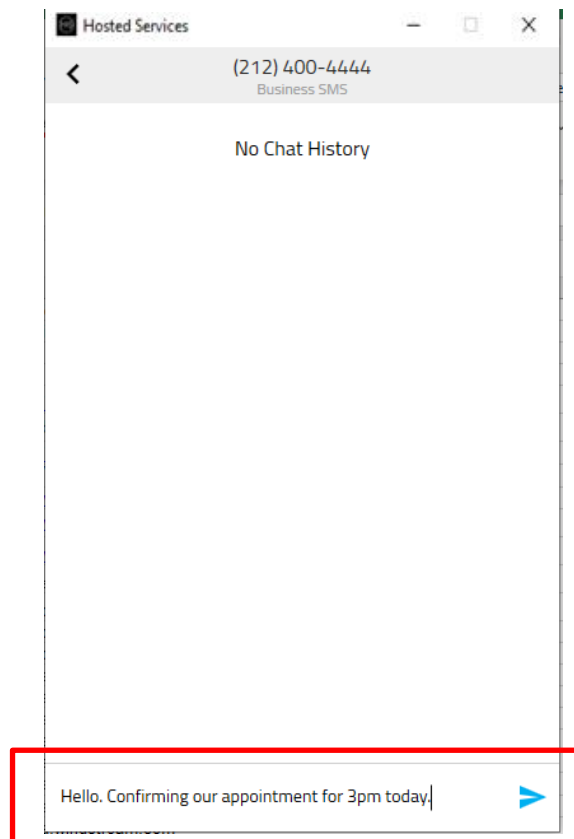To send a message to a new SMS party, click the **Start Chat** icon.
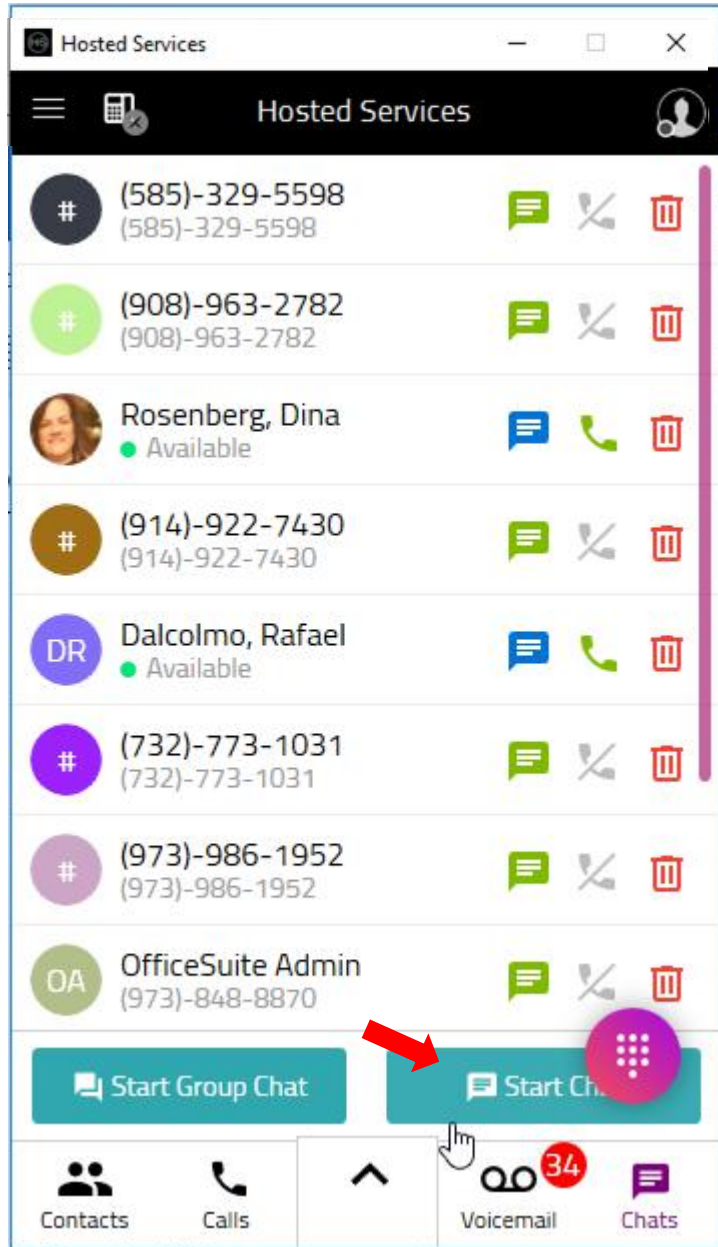
Then, enter the desired number (including the area code) into the **To:** dialog box.

Once the SMS bubble appears, click on it to initiate a new SMS session with that party.
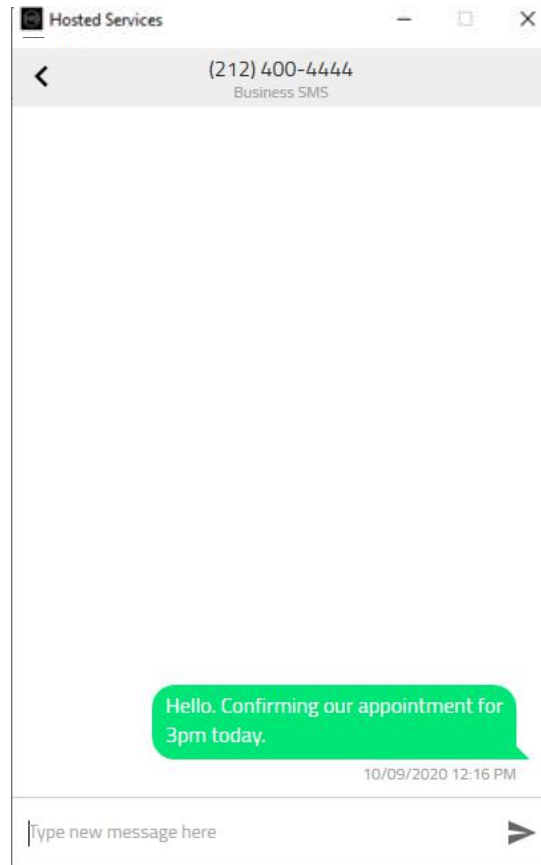

Type your message and press the send icon.

The text conversation will appear in the panel and increment with each message sent and received.

You can see the whole conversation with the party. When the party replies, it will appear in your message panel.

SMS messages are kept indefinitely on the Hosted Services server.

MMS Messaging

Customers that have purchased MMS messaging for their users can send/receive multimedia messages (e.g. images, web links, and other file types) via the Hosted Services portal Quick Connect and desktop and mobile apps in the same manner and with the same interface as SMS texting described in the section above.

Hosted Services offers two packages for MMS messaging of 500 and 1000 messages per month. With either license, the user has unlimited SMS text messaging plus an allotment of MMS messages monthly. Users that exceed their plan amount of 500 or 1000 MMS messages sent/received in the month are charged an overage rate. Hosted Services administrators can allocate MMS licenses at the SMS/MMS page in the Hosted Services portal.

Like SMS text messaging, MMS messaging enables Hosted Services users to send messages from their Hosted Services phone number to mobile phone numbers and receive messages on their Hosted Services number and thus maintain the privacy of personal cell phone numbers when messaging clients and other business associates.

Multimedia attachments (images, links, and other files) are retained on the Hosted Services server for 30 days after which they are deleted permanently. The text portion remains indefinitely, but the multimedia portion must be downloaded and saved locally if the user wants to retain it for more than 30 days.
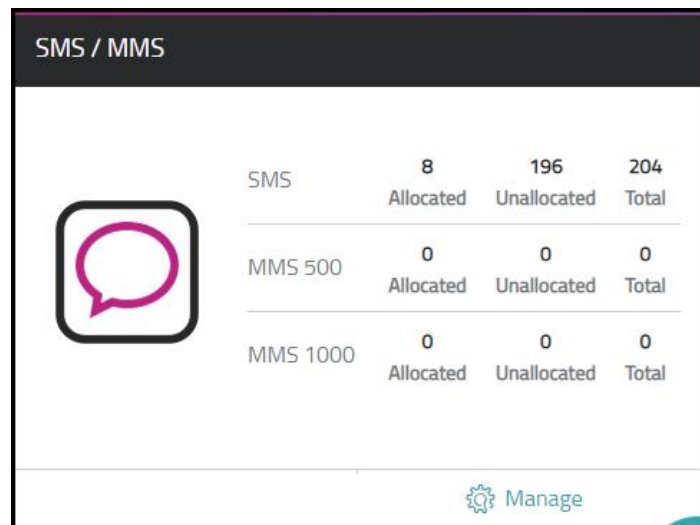
Right click on the image or file to save it. Expired media files are blurred-out in the interface and a note indicates the file has expired.

Each individual attachment is limited to a maximum size of 5MB with a maximum of three attachments with each MMS message sent/received.

Ordering and Assigning SMS/MMS to Users

Hosted Services Administrators can assign licenses to users, and edit the license type for existing users already assigned an SMS or MMS license.

Navigate to the SMS/MMS page by clicking *Manage* within the SMS/MMS license widget on the Hosted Services Licenses page or by clicking *SMS/MMS* from the Hosted Services flyout on the left side of the dashboard or via the menu at the top of the dashboard - *Services / Hosted Services / Phone System / SMS/MMS*

At the SMS/MMS page you'll see how many of each license type is allocated and available, and a list of users already assigned licenses by username, phone number, and type of license.

If a user already has a license but you want to change the type of license, select *Edit Type* on the row for that user.

Click the "X" in the *Unallocate* column if you want to remove permissions from a user.

Once you've allocated, and/or edited a user's license type, the user will receive a welcome email. It takes approximately 24 hours from receipt of that email before SMS/MMS services are available to use.