

WebChat
User Guide
General

**ACT
AS
ONE**



v. 2.4.12

1. External User Invitation

TOTR allows you to invite guests to use the application (on both Mobile and desktop) and they will be considered external users. According to the settings made by the Company Admin, the guest can have access to the following features: WebChat, Calls, Cellular Call, Video Calls, Push-To-Talk, Call Out via PBX, Always connected calls, Video streaming.

Only authorized users can make external user invitations. To make an invitation, your Company Admin must have previously activated this feature for your organization and your account. The options of this feature will follow the settings made by the Company Admin.

After sending the invitation, both the Company Admin and the admin of your department will be notified. A guest is automatically provisioned in the main department of the inviter. A guest cannot be added to a group or moved to another department.

Guests are only seen by their inviters and members of the group conversations that they have been invited to join. Likewise, the guests will see only the inviter and the members of the group conversations they have been invited to join.

In the **Contacts** list, the guest status will be mentioned next to their names.



Guests will not be included in the ALL group if it is activated for the organization.

When logging in as a guest, either for the first time or to a previously created account, you must complete the steps for a regular user.

1.1. Filling In The Invitation Manually

You can send an external user invitation:

- a) From the **Contacts** page
 - b) From an existing one-to-one conversation
 - c) From an existing group conversation, you are admin for
-
- a) To invite a guest from the **Contacts** page, click the **External User Invitation** button.



Contacts > External user invitation

A form will be displayed to manually fill in the guest's details: name, email address, and phone number. It is mandatory to enter all of them. Then you need to choose the mode in which the guest will receive the invitation: by SMS, or by email. You can choose both as well. Optionally, you can add text to describe the invitation.

EXTERNAL USER INVITATION ✕

First name

Last name

Email address

Phone Number

Invitation mode
 SMS Email

Details
 0 / 200

CANCEL SEND

Contacts > External user invitation form

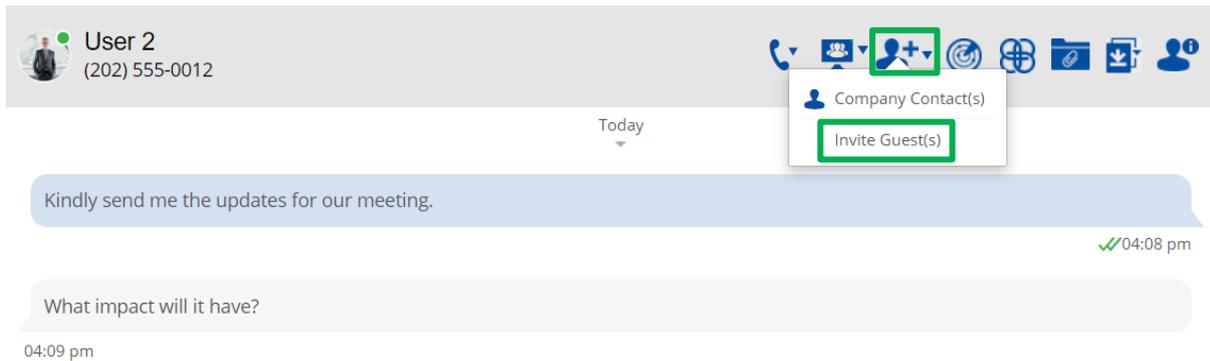
After sending the invitation, both the inviter and the other users will see the guests in the **Contacts** list, labeled as "Guest". The Authentication status will be visible too.

From the **Contacts** page, then a new one-to-one/group conversation with the guest can be initiated by you (the inviter) or the other users.

The guest will see only the inviter in the **Contacts** list but if invited to join a group conversation, the guest will be able to see the other members too both in the **Contacts** and in the list displayed after clicking **View Conversation Members**.

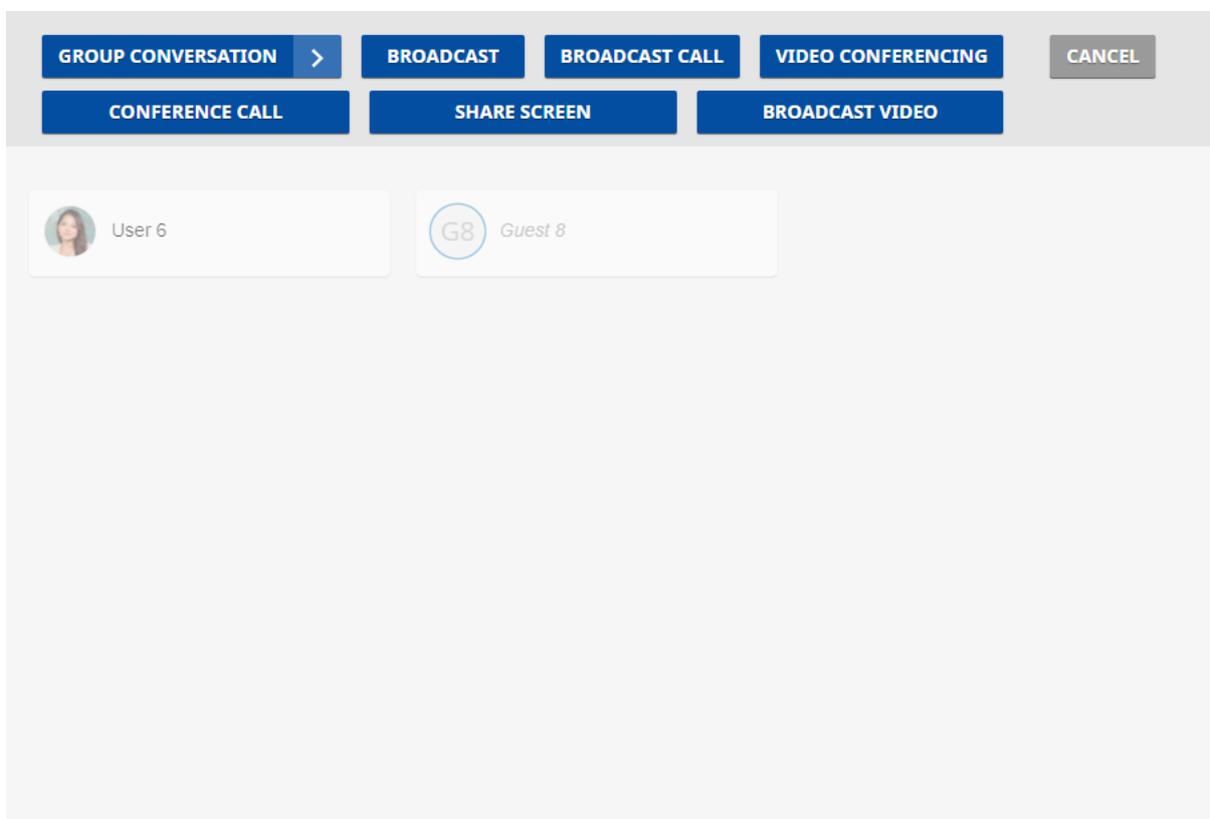
The communication options with the external guest will follow the profile set by the Company Admin.

- b) To invite a guest from an existing one-to-one conversation, click **Create Group Conversation** and then **Invite Guest**.



One-to-one conversation > Create group conversation > Invite guest

Once the invitation is sent, both the interlocutor of the existing conversation and the guest will be automatically selected through **Multi-Selection**, allowing you to choose a group communication option.



One-to-one Conversation > Create group conversation > External invitation sent through Invite guest

- c) To invite a guest from an existing group conversation, you must be an admin for that group conversation.

For more information about the **Group Conversation** feature, go to the dedicated chapter in the guide (*Group Conversation*).

1.2. The Inability to Send External Invitations

You will not be able to send the invitation in the following situations:

- The mandatory information is not filled in. (The **Send** button will stay disabled.)
- The email/SMS has not a valid format. (You will be notified: "Invalid format".)

- Forbidden email domain. (You will be notified: "The domain is forbidden".)
- Forbidden phone number country code. (You will be notified: "The country code is forbidden".)
- The Company Admin disabled your right to send invitations. (You will be notified: "You are not anymore authorized to invite external users. Please contact your admin for more information".)
- SMS and email invitation are both deactivated for the organization. (The error message will make the following recommendation: "Please contact your Company Admin to activate at least one invitation mode".)

1.3. Invitation Details

The SMS and the email received by the guest includes the details needed to use both WebChat and the Mobile application. If the guest profile set by the Company Admin has not been given access to WebChat, only the details for the Mobile application will be mentioned.

User 3 has invited you to join a conversation on team on the run.

Hello Guest,

User 3 has invited you to join to the team on the run service.

Download the app by clicking on <https://get.teamontherun.com> from your device and use the following ID 123456 to log in.

Please check that you have a network connection while proceeding to the mobile account activation.

Open this link <https://webchat.streamwide.ro> on our Webchat and use this activation code 883111 and your phone number +1 000 000 1234 to login.

Notes:

1. The above Activation Code is active until 2021-07-03 00:00:00. If you do not activate your WebChat account until then, you will be able to request a new activation code directly on the WebChat Login page by clicking on the New User button.
2. If you cannot click on any of the above website links, you need to manually copy-paste them in your browser.

Best regards,

The team on the run team

This e-mail was sent to guest1@yopmail.com by team on the run on behalf of TOTR Services.

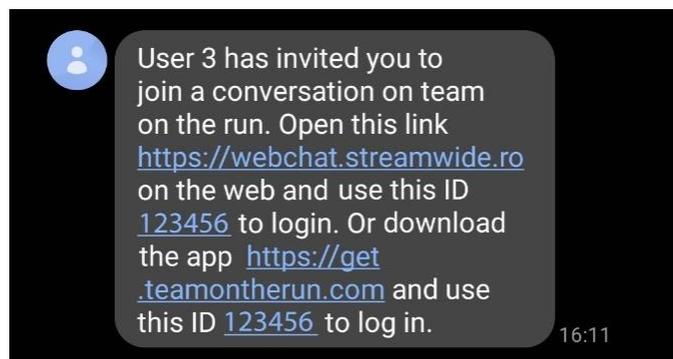
If you have received this e-mail in error, please contact us: info@teamontherun.com.

If you need help, please send us an e-mail at support@teamontherun.com

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Email received by the guest with access to both WebChat and Mobile



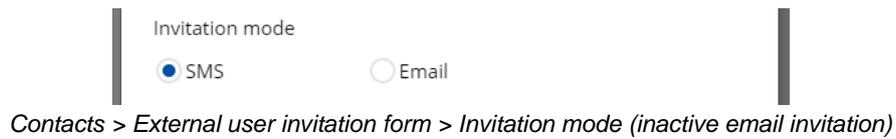
SMS received by the guest with access to both WebChat and Mobile

1.4. Sending External Invitation by Email

To send the invitation-only by email, select only the Email as invitation mode. The invitation by email is useful especially if the guest does not have an SMS device.



If the option to send invitations by email is inactive for your organization, then the SMS option will be selected by default while the email option it will remain inactive.



1.5. Sending External Invitation by SMS

To send the invitation-only by SMS, select only the SMS as invitation mode.



If the option to send invitations by SMS is inactive for your organization, then the email option will be selected by default while the SMS option it will remain inactive.



