

What is SmartMsg?

This is a quick reference guide for the SmartMsg Client for Windows – the software that allows receiving messages and utilizing Smartmsg Secure Chat via a Windows client computer.

How do I start the SmartMsg client application?

When the SmartMsg client is installed, it is set up so that it will automatically start every time you log into Windows.

How do I know if the SmartMsg client software is running and whether or not it is connected to the system?

When the SmartMsg client is running, there will be one of two different icons in the system tray (the system tray is usually in the bottom right-hand corner of your screen)

When the client is **connected** the icon is **yellow** -

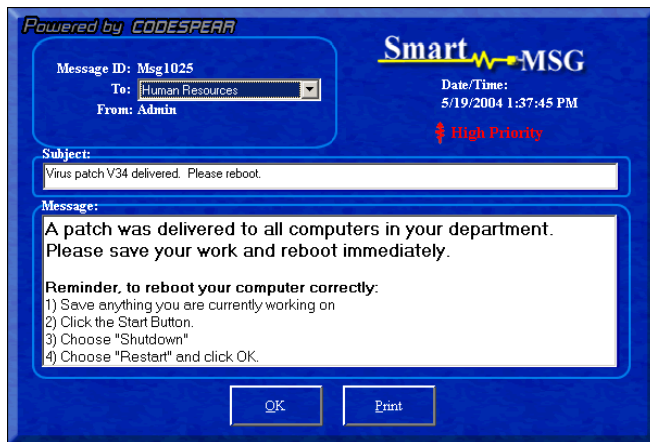


When the client is **disconnected** the icon is **red** -



Receiving Messages

SmartMsg messages received on a computer will appear as a pop-up. A standard SmartMsg message will look something like this:



To Acknowledge a Message:

A SmartMsg pop-up message will take priority over all other applications and will appear on top. The message cannot be moved or resized. Other applications cannot be placed on top of the message. The message is meant to get your attention because of its importance. Read the message and click the OK button or Reply button (whichever one appears). If you click a Reply button, complete the survey that appears. The pop-up message will disappear and an acknowledgement is sent back to the server so that the sender knows you have received the message.

To View a Message that has Already Been Acknowledged:

- Right click the yellow Connected icon in the system tray.
- Choose “View Message Logs” from menu that appears.
- Highlight a message to see detail for the message displayed in the lower pane of the Message Viewer.

Note: SmartMsg messages are also sometimes referred to as “alerts” or “Smart messages”.

Printing Messages

To Print from the Original Message Pop-up:

- Click the print button on the pop-up message before clicking the OK or Reply button.

Additional Notes on Printing:

- Message will print to the current default, Windows printer.
- Text and any embedded images in the message body will print, as well as information such as message ID, date/time, priority and subject of the message. (Attached files and graphics *outside* of the message body are not included in the printout.)

To Print a Message that has Already Been Acknowledged:

- Right click the yellow SM icon in the system tray.
- Choose “View Message Logs” from the menu.
- Select the desired message from the grid.
- Click the print button at the bottom of the Message Viewer.

The SmartMsg Client Right Click Menu

Send Message
Start Chat Session
Contacts
Public Chat
View Message Logs
Settings
Logoff KHoffman
Exit


To easily access SmartMsg client functions, such as Sending a Message, Starting a Chat session, View Message Logs or view/modify Settings:

Right click the yellow connected SmartMsg client icon and select the function from the menu that appears.


Alternately, you can double click the yellow SmartMsg client icon to bring up the main Client window, where SmartMsg client functions can be accessed.

Chat

To Initiate a Private Chat Session:

- Right click the Yellow icon in the system tray. 
- Select “Start Chat Session” from the menu that appears.
- The object selection form appears. Select the desired user(s) from the Contacts tab and/or the Users tab and click OK. (Chat window is opened. Each user selected will be sent a chat session request, which he/she can accept or reject.)

To Invite Additional Users to an Existing Chat Session:

- Click the “Invite User” option on the toolbar. 
- Select the desired user(s) from Contacts and/or Users list. (Selected user(s) will now be prompted to join the session.)
- A message will appear in the chat window indicating if the invited user(s) accept or decline the chat invitation.

To Keep a Chat Session on top of other windows:

- While in a chat session, click on the Tools Menu.
- Select “Always on Top.” The option will show a checkmark while it is selected. (The option stays in effect for the current chat session only. See Below to always put chat windows on top.)

Chat Settings

The following Chat settings can be accessed from the Chat Tab. See instructions on the right for accessing the Chat Tab.

To Receive Initial Chat Requests on top of other windows:

- Click the Options button.
- Check the option labeled “Chat Requests on Top.”

To Automatically Accept Incoming Chat Requests:

(Chat session will automatically open without prompting.)

- Click the options button.
 - Check the option labeled “Automatically Accept all Incoming Chat Requests”
- OR-**
When prompted with an incoming chat request, check the option labeled “Automatically Accept all Incoming Chat.”

To Add a User to your Chat Ban List:

(As long as a user is included in your Chat Ban List, that user will not be permitted to send you a Chat request.)

- Click on the Banned Users button.
- Click the Modify tab to access the object selection form.
- Add/Remove users as desired and click OK.

(A user sending you a chat request can be added to your Chat Ban List. On the chat request prompt, check the option “Disregard all future requests” and click the No button.)

Setting your Online status (Online, Away or Busy)

- Double click the Connected icon in the system tray.
- Click the arrow under “Online Status” in the upper-right.
- Select desired status (Online, Away or Busy). (Other users will see the appropriate icon along with your username to indicate your status Online/ Away / Busy.) To automatically set your status to “Away” after a specified number of minutes of inactivity, go to Settings -> Chat and click the Options button.

To Make a Chat Session Public:

- Select Session Settings from the Actions menu (in chat session.)
- Click the Public option and type in a Session Topic.
- (Optional) To limit participants, click the Modify button and select group(s). (A public session will be available for these groups to join without invitation.)

- 1) Double click the yellow SM icon in the system tray
- 2) Click the Settings Button on the left button bar.
- 3) Click the Chat Tab.

To Change Fonts/colors for Chat:

- Click the Fonts/Colors button.
- Select a font and size to apply to all of your chat text.
- Separate colors can be selected for the various components of your chat session, such as your text, the remote text (text from other users), system messages and URLs.

HOT KEYS:

Hot keys allow you to quickly insert frequently used text into a chat session with a shortcut key (ctrl key + number).

To Specify Text for a Hot Key:

- Click the Hot Keys Button.
- Select the Hot Key on the left and type in desired text for that hot key on the right.
- Clear button clears current text for the selected Hot Key.

To Utilize a Hot Key within a Chat Session:

- Hold the Ctrl key and the correct number key **-OR-** Click on the Actions Menu and select Hot Keys.
- Select the desired Hot Key from the list that appears. (Hot Key text appears in the bottom text box. You can modify the text before clicking the send button.)

Contacts

(Your Contacts list provides a quick link to other users with whom you frequently communicate. Users can be selected directly from your contacts list for initiating chat sessions, sending messages, viewing user profiles. The Contacts list also provides online status for all of your frequent contacts, so you can tell at a glance if a contact is online, away or busy.)

To Add or Remove users from your Contacts List:

- Double click the yellow SM icon in the system tray. (Notice the client panel opens with Contacts open.)
- Click the Modify Contacts button on the right and select contacts from the object selection form that appears.
- Click OK to return to the Contacts Tab. (Added Contacts will now appear in your Contacts list.)