Secure Messaging Plus

for Apple Handhelds

centratel

telephone answering service

User's Guide

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Secure Messaging Plus for Apple® Handhelds

This document describes how to use the **Secure Messaging Plus (SM+)** App on a qualified Apple® iPhone®, iPad®, or iTouch®.

Topics in the document include:

- **What is Secure Messaging Plus? (page 6)**
- **Key SM+ Features & Benefits (page 7)**
- **Downloading & Installing the SM+ App (page 8)**
- **Secure Messaging Plus Conversations (page 12)**
- **Secure Messaging Plus Contacts (page 16)**
- **Secure Messaging Plus Settings (page 18)**

What is Secure Messaging Plus?

At the time of this writing, Secure Messaging Plus is supported for iPhones, iPads , and iTouch devices running Apple iOS **7.1** or higher.

Secure Messaging Plus (SM+) is a high-security messaging system that allows subscribers to exchange sensitive information via messages that are encrypted in transit and at rest. Additional features, like *Expiring Messages, Password Requirements,* and *Remote Wipe (*for users who also use the SM+ Website), add extra security to ensure that private messages always remain private.

Secure messages can be sent or received using a qualified handheld device running the Secure Messaging Plus App, or by logging into a Secure Messaging Plus Website. (To exchange secure messages between handheld devices, both devices need to have the SM+ App installed.)

This document describes how to use the Secure Messaging Plus App installed on a qualified Apple® iPhone®, iPad®, or iTouch®. If you are using the SM+ Website or an Android™ device, please request the document that describes SM+ Website or Android™ device usage.

For more information about key SM+ features and benefits, see ***"Key SM+ Features & Benefits"*** on **page 7**.

Please Note

The instructions in this manual apply to the Secure Messaging App installed on an **Apple iPhone 5s**. Functions and screens may vary slightly if you are using a different device.

KEY SM+ FEATURES & BENEFITS

	FEATURE	BENEFIT
✓	**Encrypted Messaging**	Messages and attachments are safely encrypted on servers, devices, and in transit.
✓	**Message Expiration**	Senders have the ability to determine when a sent SM+ message expires. Messages can expire when marked by the reader as *read* or *filed*, or in a selected number of days. Messages that do not have a defined expiration date will expire within a defined default period (not to exceed 30 days).
✓	**Password Protection**	Expiring passwords and forced lockouts help protect a user's data and account.
✓	**Multiple Device Support**	SM+ can be registered on up to 3 qualified handheld devices per subscriber. It can also be accessed via a Web browser.
✓	**Multiple Operating System (OS) Support**	SM+ is compatible with the latest versions of Android™ and iOS® (iPad®, iPhone®, iTouch®).
✓	**Support for Image and Audio Attachments**	SM+ messages can include image and audio attachments.
✓	**Remote Wipe Capability**	If an SM+-registered handheld device is lost or stolen, a Wipe command can be issued from the Web to remotely erase all SM+ App data stored on the device.
✓	**Message Status Tracking**	Subscribers can track when a message from their device was sent, viewed, read, and filed.
✓	**Detailed Reporting**	Real-time reports on subscriber usage can be run (on the SM+ Website) by both subscribers and SM+ Channel Partner Administrators.
✓	**Full Audit Trails**	When SM+ is used in conjunction with a Startel CMC system, messages are fully tracked and archived.
✓	**Accessibility**	SM+ messaging is easily accessible using a Web browser, Apple® handheld, or Android™ handheld running the SM+ App.
✓	**Privacy Policy**	Startel does not disclose, sell, or distribute users' personal information to any third party.

Downloading & Installing the SM+ App

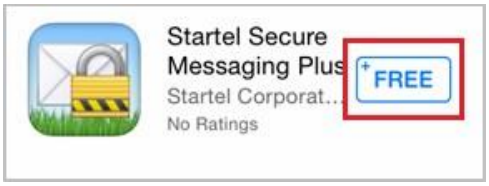
Before you can exchange Secure Messaging Plus messages using an Apple iPad, iPhone, or iTouch, you will need to download the Secure Messaging App from the Apple iTunes Store.

Once the App has been downloaded and installed on the device, you will be able to use your Secure Messaging Plus **User name** and **Password** to Login and use the application. If you have not been provided with a User name and Password, please contact your SM+ Channel Partner Administrator.

These instructions apply to a typical Install procedure. Your Install procedure may vary depending on your device, and device settings.

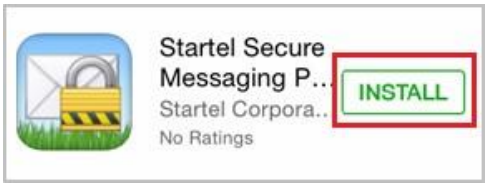
Follow these steps to install the SM+ App on an Apple device.

1. Go to the Apple iTunes Store and search for **Startel**.
2. Find the Startel Secure Messaging Plus App.



3. Tap **Free**.

   Now an Install feature should appear.

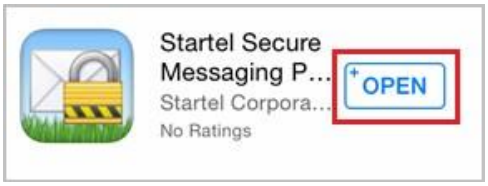


4. Tap **Install**.
5. When prompted to read and accept Terms and Conditions, tap **Agree** to accept and proceed.

   A message like the following is displayed:

6. Tap **OK**.

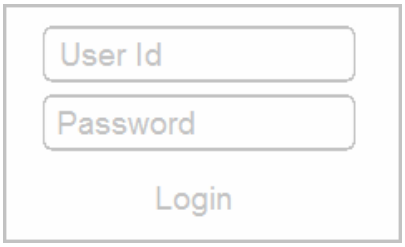
When the download is complete, you will see the following:



7 Tap **Open**.

8 You are prompted to indicate if you want to receive message notifications (Push notifications) when the SMP+ App is closed. If you do, select **OK.**

9 A **Login** prompt is displayed.



10 To log in to the application, enter your Secure Messaging Plus User name and Password into the **User Id** and **Password** fields. (Only the password is case sensitive.)

You will see a message like the following:

11 Tap **Ok**.

A screen for entering device information is displayed.

12 In the field under the **Device Information** heading, enter a name for the device. This is for your reference only, and will only be seen when viewing your registered device(s) through the SM+ Website.

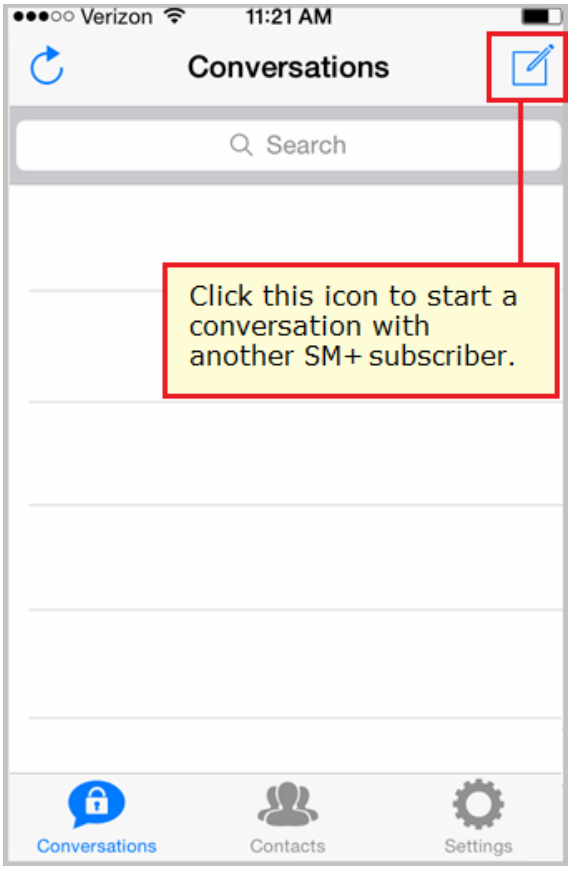
13 Select an **In App Tone** notification from the available options. This notification plays when the App is ***open*** and a new message arrives.

14 Select a **Notification Tone** from the available options. This notification tone plays when the app is ***closed*** and a new message arrives.

15 Tap **Register** at the top right of the screen.

When the device registers correctly, the Secure Messaging Plus **Conversations** screen appears. From here, you can start a conversation with any other registered SM+ subscriber, or with your Answering Service if they are using a Startel CMC system integrated with Secure Messaging Plus.

After you begin exchanging messages with other SM+ users, active conversations are listed in the Conversations screen.



16 For more information, see ***"Secure Messaging Plus Conversations"*** on **page 12**.

SECURE MESSAGING PLUS CONVERSATIONS

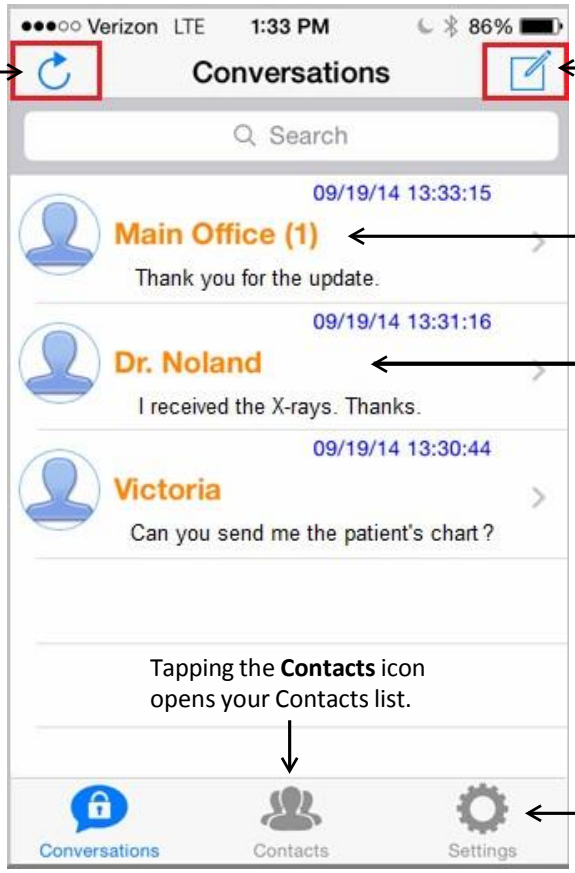
Any SM+ subscriber who sends you a message, or to whom you send a message, is automatically added to your Contacts list. See page 16 for more on SM+ Contacts.

When you open the Secure Messaging Plus (SM+) App on an Apple handheld device, a **Conversations** screen lists all of your active conversations, if any, and shows you a preview of the most recent message in each listed conversation. (This message may be one you sent, or one that you received.)

The conversations are represented by the **name** of the Contact associated with the conversation.

Conversations that contain **new** (unviewed) messages sent by the contact are at the top of the list. A number in parentheses is show to indicate how many messages from a contact are new. For example, a **(1)** will be shown if a conversation has one new message from a listed Contact.

Tapping this icon refreshes the Conversations list.



Tap this icon if you want to start a new conversation.

This (**1**) tells you that there is one new message from the Main Office.

To open any conversation, you simply need to tap it. For example, to open the conversation with **Dr. Noland**, you would simply tap anywhere in this area.

Tapping the settings icon allows you to review or change settings associated with your SM+ account.

See the following topics for more information:

- **Starting a New Conversation** (page 13)
- **Opening/Continuing an Existing Conversation** (page 14)
- **Secure Messaging Plus Contacts** (page 16)
- **Secure Messaging Plus Settings** (page 19)

Starting a New Conversation

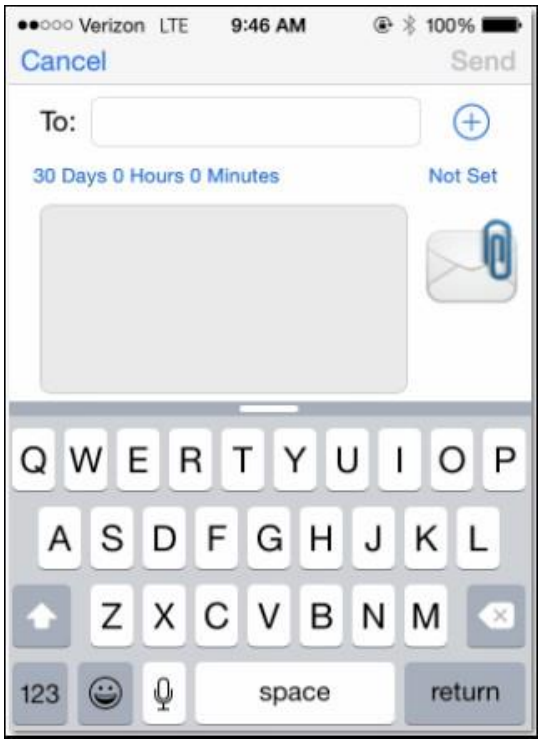
Follow these steps to start a new conversation from the Conversations screen.

1 Log in to the SM+ App.

The Conversation screen is displayed.

2 Tap .

A New Message screen opens.



Setting a Message Expiration

Expiration settings control when the message will expire if the message is not manually expired from the SM+ website or handheld device. When a message is expired, it is removed from all handheld devices (both sender's and receiver's), from the SM+ website, and from the SM+ database.

If you want to set specific Expiration settings for a message, tap the default Expiration setting, shown in blue. (For example, **30 Days 0 Hours 0 Minutes**). Then indicate your preference for the message. For an explanation of the Expiration options, see page 22.

If you want to send a "broadcast" message, you can type in multiple User names (separated by semicolons) or tap the ⊕ icon and select multiple contacts.

3 In the **To** field, enter the SM+ **User name** of the SM+ subscriber to whom you want to send the message. (Or tap ⊕ to select from your Contacts list.)

If you enter a valid SM+ User Name that is not already in your SM+ Contacts list, the subscriber will be added to the Contacts list.

4 Type up to 1024 characters in the message field.

5 If you want to send a recording or image attachment with the message, tap , then select the file you want to attach.

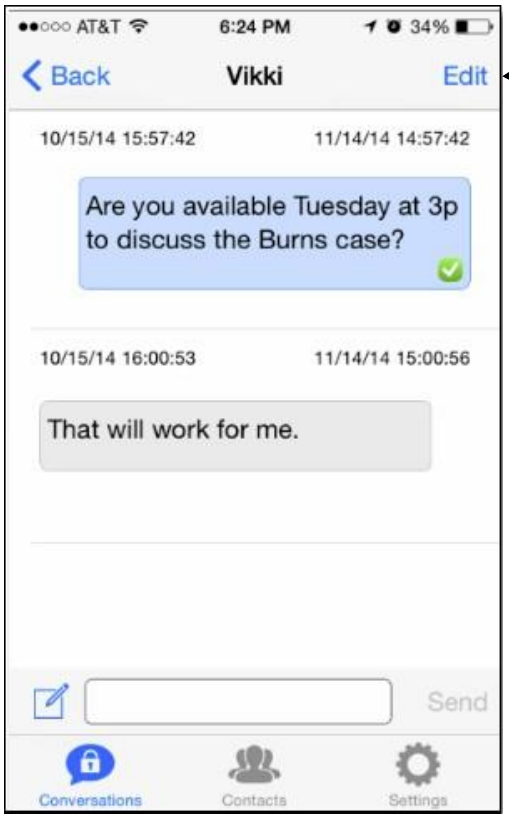
6 When you're ready to send the message, tap **Send**.

Opening/Continuing an Existing Conversation

Follow these steps from the Conversation screen to open or continue an existing conversation.

1 Tap the conversation that you want to open.

The conversation is displayed.



If you want to mark a received message as "read," expire a message, delete a message, or File a message, tap the message, then tap **Edit**. See page 15 for more information.

In a Message Conversation, right-justified messages on a **blue** background are messages that **YOU HAVE SENT.**

The ✓ icon indicates that the subscriber has viewed the message.

Left-justified messages on a **gray** background are messages that were **SENT TO YOU**.

New messages are shown in **bold-faced blue** text.

2 To send a new message, type up to 1024 characters into the message field at the bottom of the conversation. (This field is marked with the icon.)

3 If you want to apply special features to the message—for example, if you want to set a special Message Expiration or add an attachment to the message—tap . Instructions for using special features are provided on **page 13**.

4 When you're ready to send the message, tap **Send**.

Important Note to Users Associated With an Answering Service

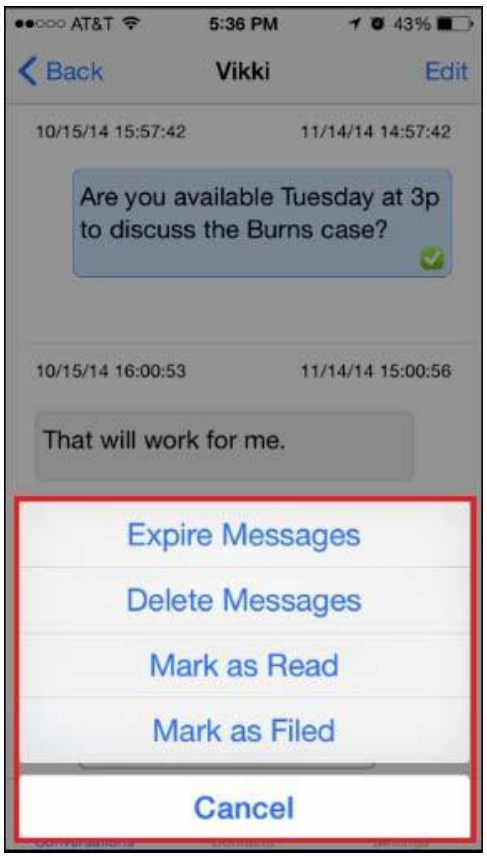
If you are **replying** to a message from your Answering Service, you should select (tap) the message to which you're replying. When you do this, the **Send** feature changes to **Reply**. Using **Reply** instead of **Send** establishes a connection between the two messages in the software/database used by the Answering Service. If you are **not** communicating with an Answering Service, you can use the Reply feature, but it will have no noticeable impact.

Applying "Edit" Options to a Message or Messages

If you tap **Edit** in the upper-right corner of a message conversation, a list of options opens at the bottom of the screen.

To use an option, you simply tap the option, then tap the message or messages to which you want to apply the option.

When you're finished, tap **Done**. (**Edit** will have changed to **Done**.)



When Edit Options are displayed:

- Tap **Expire Messages** if you want to remove one or more messages from all handheld devices (sender's and receiver's), the SM+ Website, and the SM+ database. (Be cautious. This cannot be undone.)
- Tap **Delete Messages** if you want to remove one or more messages from this handheld only. (A *Resynchronize* will restore non-expired deleted messages. See **page 23** for details.)
- Tap **Mark as Read** if you want to let the message sender know that you have read one or more messages.
- Tap **Mark as Filed** if you want to file one or more messages.
- Tap **Cancel** to cancel.

Please Note:

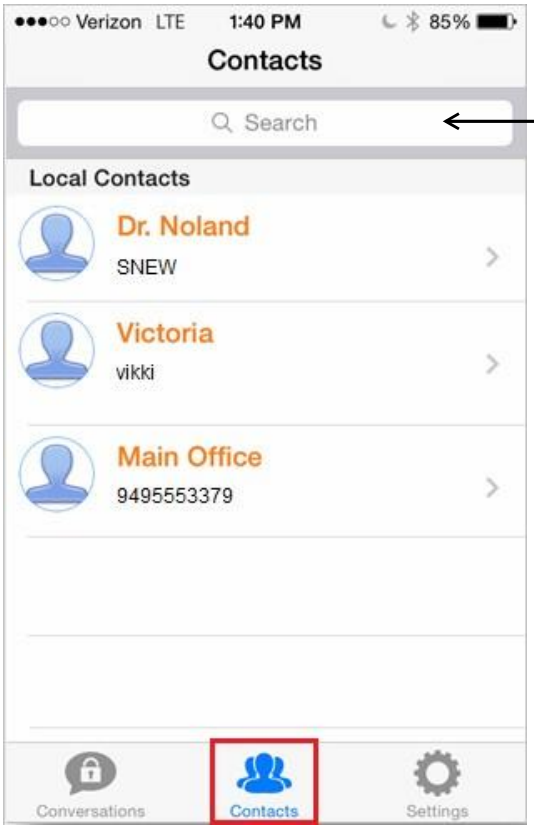
The **Mark as Filed** feature applies to subscribers who receive messages from an Answering Service. It lets the subscriber "file" messages, which allows agents to see that the messages are no longer "pending."

Secure Messaging Plus Contacts

Any SM+ subscriber who sends you a message, or to whom you send a message, is automatically added to your Secure Messaging Plus Contacts list.

To see your Contacts list, you simply need to tap the

icon.



If your Contacts list is long, you can quickly locate a contact by typing any part of the contact's User name or Display name into the Search field.

To display a set of options for any contact, simply tap the contact's name.

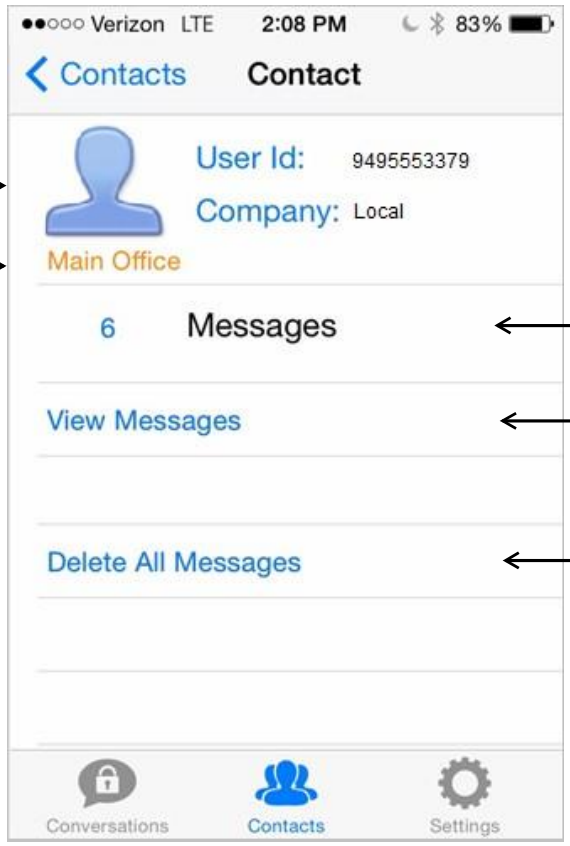
The screen on the following page shows the options associated with the **Main Office** contact shown in this sample screen.

In a Contact screen:

Tapping here redisplays the Contacts list.

Tapping this icon lets you select a photo for the contact.

Tapping the orange Display Name lets you change the *Display Name* for the contact.



This number tells you how many messages are currently associated with this contact.

Tapping **View Messages** will take you to the Conversation screen for this contact.

Tapping **Delete All Messages** will delete all messages associated with this contact from the handheld.

Note: Messages are deleted from this handheld only, and will re-appear upon "resynchronization." See page 23 for details on resynchronization.

Secure Messaging Plus Settings

Tapping the SM+

icon opens a screen from which you can access and change a number of different Secure Messaging Plus settings.

Notification Settings let you view whether Push Notification is enabled for your device and choose the Notification tones that alert you to incoming SM+ messages.

Expiration Settings affect the defaults for when or under what circumstances your outgoing messages expire.

Tapping **Delete All Messages** deletes all messages from the handheld (only). See *"Using Advanced Settings"* on page 23 for more information.

Account Information allows you to change your SM+ Display Name or Password.

Passcode Settings allow you to add an extra layer of security to your SM+ data. (This is NOT required.)

Tapping **Resynchronize** refreshes both your messages and your contacts.

Tapping **Sign Out** closes and logs you out of the SM+ App.

See the following topics for information on each of the available settings:

- **Changing Account Information Settings** (page 19)
- **Changing Notification Settings** (page 20)
- **Changing Passcode Settings** (page 21)
- **Changing Expiration Settings** (page 22)
- **Using Advanced Settings** (page 23)

Changing Account Information Settings

Tapping **Account Information >** in the SM+ Settings screen (shown on **page 18)** opens a screen from which you can access and change certain SM+ Subscriber account settings.

You can change your SM+ Display Name, and you can change your SM+ login Password. You cannot change the User Id (User name). The User Id shown in this screen is display only.

You **cannot** change the User Id in this screen. This field is display only.

- To change the **Display Name**, replace the current name, then tap **Save**.
- To change the **Password**, enter the current password in the Current Password field, type a new password in the set of fields below, and then tap **Change Password**.

> ➢ NOTE: A "strong" password containing both letters and numbers, and upper and lower-case letters is recommended.

Changing Notification Settings

Tapping **Notification Settings >** in the SM+ Settings screen (shown on **page 18)** displays a screen where SM+ Notification settings can be viewed or changed.

If **Push Notifications** are enabled for this application, you will see the "slide button" in this position.

To enable this feature and configure Push Notification preferences, you need to use your device's **Settings** application.

Under the TONES heading:

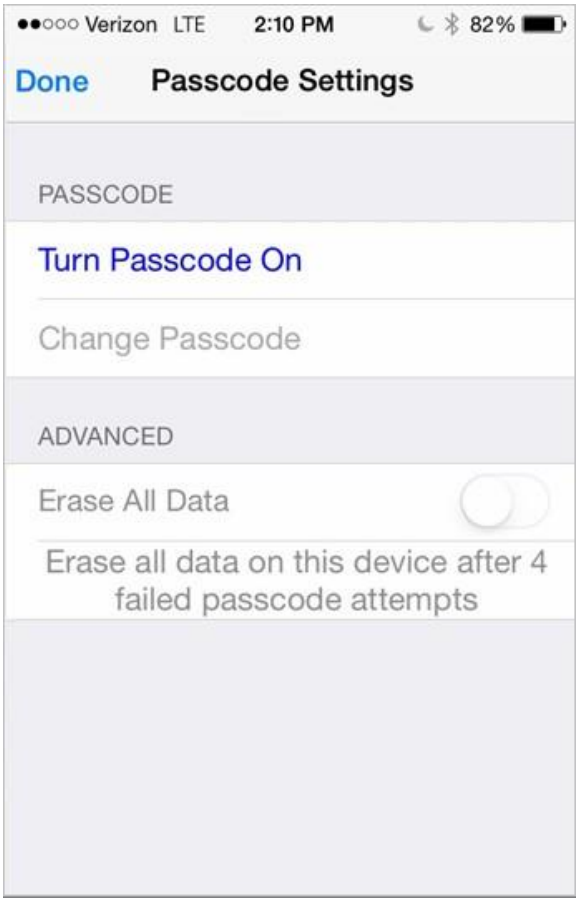
- Tapping **In App Tone** allows you to select the notification tone that will occur if a message is received while the subscriber is in the SM+ App.
- Tapping **Push Tone** allows you to select the notification tone that will occur if a message is received when the SM+ App is minimized or closed.

Under the IN APP VIBRATION heading:

- Tapping the **New Message** "slide button" allows you to choose a vibration in addition to a tone as the "In App" notification.

Changing Passcode Settings

Tapping **Passcode Settings >** in the SM+ Settings screen (shown on page 18) displays optional features that can be used to add extra layers of security to the handheld's Secure Messaging Plus data.



Do the following to enable extra Security features:

- If you want to require that a passcode be entered each time the Secure Messaging Plus App is accessed while the user is logged in, tap **Turn Passcode On**, then specify the desired 4-digit passcode when prompted.

  Notice that with Passcode Protection enabled, the Passcode options read:

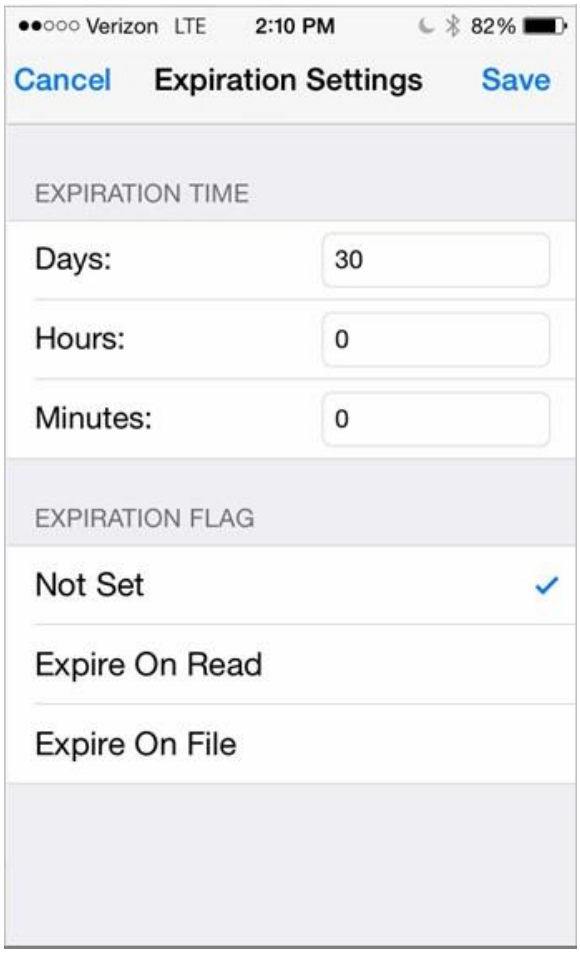
  - **Turn Passcode Off**
  - **Change Passcode**

  These allow you to turn the "Passcode" feature off, or change the Passcode, if necessary.

- If you want the SM+ App to erase all messages from the device after a fourth failed attempt to correctly enter the passcode, tap the **Erase All Data** slide button. (This feature can only be enabled if the Passcode feature is turned on.)

Changing Expiration Settings

Tapping **Expiration Settings >** in the SM+ Settings screen (shown on page 18) opens a screen from which you can view and change Secure Messaging Plus default ***Expiration settings***.



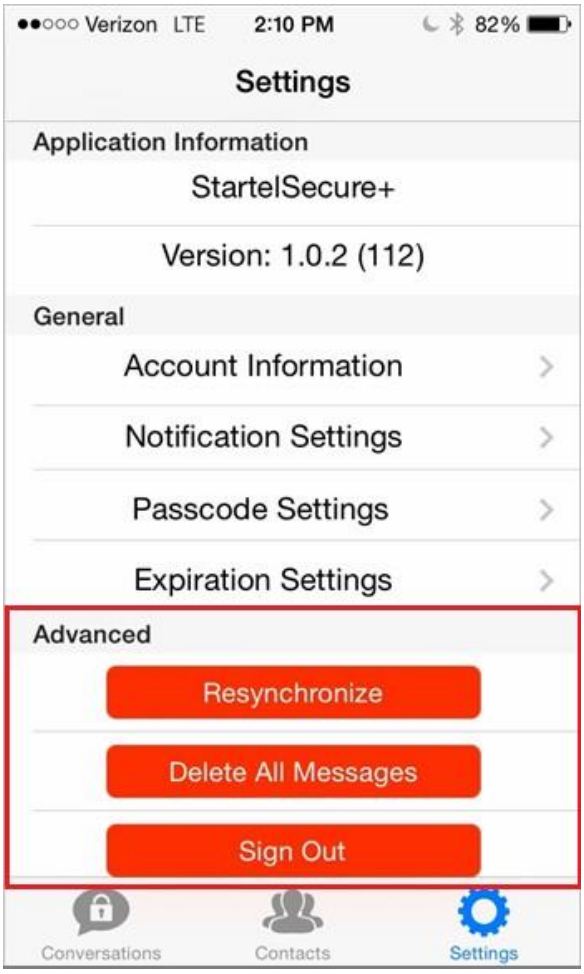
Expiration settings control when a message sent by the subscriber will expire if the message is not manually expired from the SM+ website or handheld device. When a message is expired, it is removed from all handheld devices (both sender's and receiver's), from the SM+ Website, and from the SM+ database.

Do the following to set or change default Expiration settings in this screen:

- Under the **Expiration Time** heading, specify a default expiration time for sent messages that are not expired by other means (*on read*, *on file*, or manually). For example, 10 Days.
- Tap **Expire On read** if you want SM+ messages sent by the subscriber to be expired when they are marked as ***Read*** by the message receiver.
- Tap **Expire On File** if you want SM+ messages sent by the subscriber to be expired when they are ***Filed*** by the message receiver.

Using Advanced Settings

Three features are available under the **Advanced** heading in the Secure Messaging Plus **Settings** screen: ***Resynchronize***; ***Delete All Messages***; and ***Sign Out***.



Resynchronize

Tapping **Resynchronize** refreshes the Conversations and Contacts on the device. All deleted messages are restored, but expired messages are NOT restored. (Expired messages are removed permanently from all devices as well as the Secure Messaging Plus website and database.)

Delete All Messages

Messages received AFTER a **Delete All Messages** is issued are NOT affected.

Tapping **Delete All Messages** removes all messages from this device only. (They are NOT expired.) Please note that if you subsequently perform a **Resynchronize**, deleted messages (that have not expired) will reappear.

Sign Out

Tapping **Sign Out** logs you out of the Secure Messaging Plus App.

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