



SmartMeet

by MeetingConnect

Technical Guide

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SmartMeet™ Overview

SmartMeet allows you to manage and participate in meetings from your Android and iOS phones and tablets.

From SmartMeet, you can:

- Start and participate in meetings from anywhere on your mobile device
- Schedule meetings or start an ad hoc meeting
- Invite participants to join a meeting using your mobile device's address book
- Record meetings
- Lock a meeting door to ensure meeting privacy
- See participants in the waiting room and allow or disallow their entry into the meeting
- See who is talking and mute yourself or participants
- Dismiss participants
- End the meeting

Setup

System requirements

Operating System	Android Phone <ul style="list-style-type: none">▪ Android 2.3.x, 4.0.x or higher
	iPhone <ul style="list-style-type: none">▪ iOS 6.x or higher
Connection	Audio call <ul style="list-style-type: none">▪ Cellular network connection
	Voice over IP call: Wi-Fi or Cellular network connection (3G or higher)
	Meeting controls <ul style="list-style-type: none">▪ Wi-Fi or Cellular network connection (3G or higher that allows simultaneous voice and data)

Downloading SmartMeet

SmartMeet is free to download from Apple's App Store for iPhones, or from Google Play for Android phones.

Starting SmartMeet for the first time

The first time you start SmartMeet, you are prompted to provide your first and last name, email address, and phone number(s). If available, you will also be asked to provide your account details. This information is required to schedule, start, or manage meetings, and can be updated or modified at any time.

Once you have entered the required information, you will be sent to the SmartMeet Home screen.

Add user details

During your initial startup, SmartMeet requests a name, e-mail address, and one or more phone numbers. Enabling Call Me enables SmartMeet to automatically dial your number and connect you to meetings.

User details can be added, modified, or deleted at any time.

If you disable Call Me or if Call Me is disabled for your Account or the meetings profiles you join with, you must use Dial-In to connect to meetings.

To add user details on your first use of SmartMeet

- 1 Enter your first and last name
- 2 Enter your e-mail address
- 3 Tap the **Phone Numbers** button and add one or more numbers: Default fields include Home, Mobile, Work, and Other.
- 4 Set application password **On** or **Off**
If **On**, you will be prompted to enter an alphanumeric password of at least six digits. You will also have the option to set the password to expire every thirty days.
Note: You will be prompted to enter the password each time you access SmartMeet in the future. If your company has selected this feature to be ON – Mandatory, you will be prompted to create an Application Password before you are able to proceed.
- 5 Tap **Next**
- 6 On the following screen, either enter your Account information and select your default Dial-In number, or skip directly to the Home screen.

To add user details from the settings screen

- 1 Select Settings
- 2 Tap User Details and Edit

SmartMeet Technical Guide

3 Change your user details

4 Tap **Done**

Related Topics

- [Add Account information](#)

Add Account information

Adding a valid Account to your SmartMeet application enables access to features such as scheduling, starting, and moderating meetings.

During your initial startup, SmartMeet will prompt you to provide Account credentials after entering your Call Me information. However, you can also attach an Account to your SmartMeet application from the Home screen.

To add an Account on your first login

- 1 Enter your first and last name
- 2 Enter your e-mail address
- 3 Tap the **Phone Numbers** button and add one or more numbers. Default fields include Home, Mobile, Work, and Other.
- 4 Tap **Next**
- 5 On the following screen, enter your Account information
- 6 Tap **Next**
- 7 Select your default Dial-In number and tap **Finish**

To add an Account from the Home screen

- 1 Swipe the Selected Account bar
- 2 Tap **Add Meeting Account**
- 3 Enter your Account information
- 4 Tap **Next**
- 5 Select your default Dial-In number and tap **Finish**

Related Topics

- [Add user details](#)

Getting Started

User Interface

Android

Home and More screens (Android)

The SmartMeet Home and More screens contain links to the tools necessary for starting, joining, and scheduling meetings, as well as reviewing your meeting history and modifying SmartMeet settings.

The Home and More screens



Action Bar

The action bar provides one-tap navigation t:

- Home
- Meeting
- Calendar
- Favorites

1

- History
- Support
- Settings

Note: To view additional action bar buttons, tap and slide to the left or right.

2

Account Selector

Home menu

3

- Start Meeting
Start an ad hoc meeting
 - Join Meeting
Join an in-progress meeting scheduled by another user
 - Schedule Meeting
Schedule a meeting and invite participants
-


Meeting screen (Android)

The meeting screen in avatar view, which displays a tiled view of participants' avatars.

The Meeting screens



1	<p>Action Bar</p> <p>The action bar provides one-tap navigation to:</p> <ul style="list-style-type: none">▪ Home▪ Meeting▪ Calendar▪ Favorites▪ History▪ Support▪ Settings <p>Note: To view additional action bar buttons, tap and slide to the left or right.</p>
2	<p>Meeting title bar</p> <ul style="list-style-type: none">▪ Self mute▪ Chat▪ Hands-free calling▪ Softphone keypad (if connected with VoIP)▪ Exit meeting or End meeting (if moderator)
3	<p>Add Participants (moderators only)</p> <ul style="list-style-type: none">▪ Invite a participant to the meeting with Call Now or with an email/SMS message
4	<p>User avatar</p> <ul style="list-style-type: none">▪ Tapping the avatar opens user options such as renaming and muting
5	<p>Meeting menu (moderators only)</p> <ul style="list-style-type: none">▪ Home



Returns you to the Home screen

- Mute/Unmute All
 - Record
Record the meeting for later reference
 - Lock/Unlock
Restrict meeting access by locking or unlocking the meeting
Participants attempting to join a locked meeting are redirected to the waiting room
-

iPhone

Home and More screens (iPhone)

The SmartMeet Home and More screens contain links to the tools necessary for starting, joining, and scheduling meetings, as well as reviewing your meeting history and modifying SmartMeet settings.

The Home and More screens



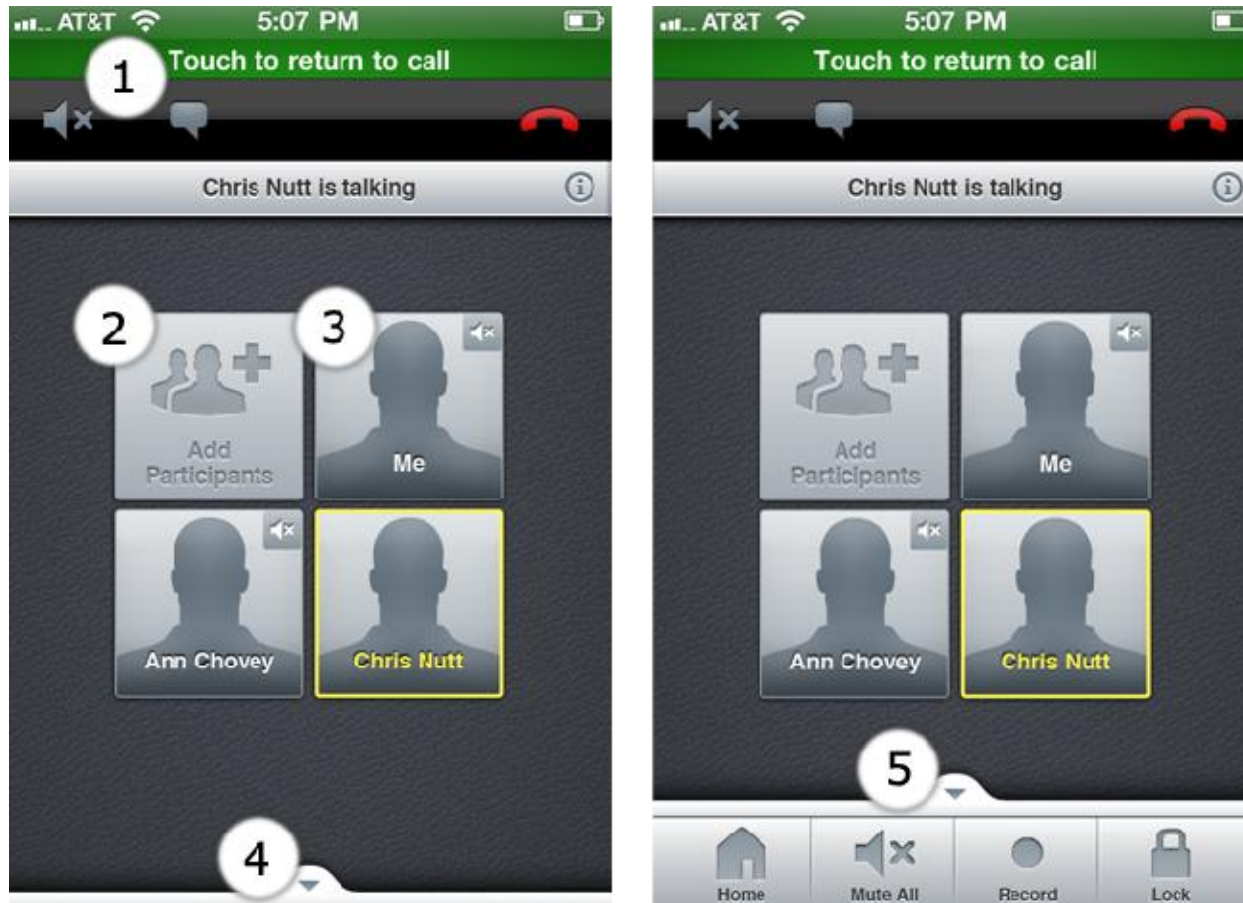
- | | |
|---|---|
| 1 | Account selector |
| 2 | Home menu <ul style="list-style-type: none">Start Meeting
Start an ad hoc meetingJoin Meeting
Join an in-progress meeting scheduled by another userSchedule Meeting |

	Schedule a meeting and invite participants
3	<p>Home screen toolbar</p> <ul style="list-style-type: none">▪ Home button Return to the Home screen▪ Meeting Return to the in-progress meeting you are attending or moderating▪ Calendar Access your calendar to view scheduled meetings▪ Favorites View your list of favorite meetings and users▪ More Open the More menu, which allows you access to features such as meeting recordings, meeting history, and SmartMeet settings
4	<p>Menu</p> <ul style="list-style-type: none">▪ History View your meeting history for the previous month▪ Settings View and modify SmartMeet settings
5	Create a Siri contact for your mobile device

Meeting screen (iPhone)

The meeting screen opens in avatar view, which displays a tiled view of participants' avatars.

The Meeting screens



1	<p>Meeting title bar</p> <ul style="list-style-type: none">▪ Self mute▪ Chat▪ Softphone keypad (if connected with VoIP)▪ Exit meeting or End meeting (if moderator)
2	<p>Add Participants</p> <ul style="list-style-type: none">▪ Invite a participant to the meeting with Call Now or with an email/SMS message
3	<p>User avatar</p> <ul style="list-style-type: none">▪ Tapping the avatar opens user options such as renaming and muting
4	<p>Meeting menu (minimized)</p>
5	<p>Meeting menu (expanded)</p> <ul style="list-style-type: none">▪ Home Returns you to the Home screen▪ Mute/Unmute All▪ Record Record an archive of the meeting for later reference▪ Lock/Unlock Restrict meeting access by locking or unlocking the meeting Participants attempting to join a locked meeting are redirected to the waiting room

Start a meeting

Project Account Codes and Security Codes

Project Account Codes

Project Accounting Codes (PACs) allow you to enter a numeric client number when starting your Reservationless-Plus® meetings using SmartMeet. If required, up to two separate 1-19 digits PAC values can be entered. This numeric, non-validated code is associated with your call or meeting, and appears on your invoice in the PAC column. PAC codes are designed for easy billing to clients, offices or other departments.


Note: Only meeting moderators are required to enter a PAC code. PAC can be set as Mandatory, Optional or Off. If set as Mandatory, the moderator cannot start the meeting until a PAC code is entered.

Security Codes

A security code can be enabled to secure your meeting. If a moderator enters a security code, participants are prompted to enter the same code in order to join the meeting. If the security code entered by the participant does not match the code provided by the moderator, they cannot join the meeting.

Note: Security Code can be set as Mandatory, Optional or Off. If set as Mandatory, the moderator will be prompted to provide and will not be able to start a meeting without entering a security code. If set as Optional, the moderator will be prompted to enter a security code, but is provided an option not to set a security code.

Starting a meeting with Call Me

You can start a meeting from SmartMeet's home screen by tapping the **Start Meeting** button . When starting a meeting with Call Me enabled, SmartMeet automatically dials your selected phone number and connects you to the meeting. Call Me numbers can be added, modified, or deleted from User Details screen.

***Note:** Meeting creation/starting a meeting is only available to moderators and users with active Accounts.*


To start a meeting with Call Me

- 1 On the home screen, click **Start a Meeting**
- 2 Select a Call Me number:
To change your number, tap the Call Me field and select a new number from the list. To add a new Call Me number, tap the **Manual Entry** button.
- 3 Tap the **Start Meeting Now** button

Related Topics

- [Starting a meeting with Dial-In](#)
- [Starting a meeting when Already Dialed In selected](#)
- [Starting a meeting with VoIP](#)
- [Add user Details](#)

Start a meeting with Dial-In

You can start a meeting from SmartMeet's home screen by tapping the **Start a Meeting** button . When starting a meeting with Call Me disabled, you must dial-in to SmartMeet to launch your meeting. SmartMeet comes with an extensive list of international Dial-In numbers to accommodate connections from anywhere in the world.

By default, the primary Dial-In number is the standard local toll free number for each meeting profile.

Note: Meeting creation/starting a meeting is only available to moderators and users with active Accounts.

To start a meeting with Dial-In

- 1 On the home screen, click **Start a Meeting**
- 2 Select a Dial-In number:
The default number is your primary toll-free dial-in.
To change your Dial-In number, tap the Dial-In number field and select a new number from the list.
- 3 Tap the **Start Meeting Now** button

Related Topics

- [Starting a meeting with Call Me](#)
- [Starting a meeting when Already Dialed In selected](#)
- [Starting a meeting with VoIP](#)
- [Add user details](#)

Start a meeting with Already Dialed In selected

If you previously connected to a meeting using the desktop client, a land line, or if you manually dialed in to the meeting outside of SmartMeet, then you can join that meeting with SmartMeet by selecting the Already Dialed In option when starting a meeting. This option allows you to easily switch from desktop to mobile for the same meeting, or to assume management of the meeting using SmartMeet options.

Note: Joining a meeting with Already Dialed In selected may require you to sync connections.


To start a meeting with Already Dialed In selected

- 1 On the home screen, click **Start a Meeting**
- 2 Using either Call Me or Dial In, select the **Already Dialed In** option
- 3 Tap **Connect Now**

Related Topics

- [Starting a meeting with Call Me](#)
- [Starting a meeting with Dial-In](#)
- [Starting a meeting with VoIP](#)
- [Add user details](#)

Start a meeting using Voice over IP (VoIP)

On enabled accounts, you can start a meeting with Voice over IP (VoIP) from SmartMeet's home screen by tapping the **Start Meeting** button  and selecting **Use Voice over IP**.

When starting or joining a meeting using VoIP, you will establish your audio connection over your phone's data plan or Wi-Fi connection. Depending on your corporate policy and account settings, you may only be able to use VoIP while connected to a Wi-Fi network. If Wi-Fi is mandatory but disabled on your device, enable your Wi-Fi connection and return to the **Join a Meeting** screen to connect using VoIP.

To start a meeting with Use Voice over IP selected

- 1 On the home screen, click **Start a Meeting**
- 2 Select **Use Voice over IP**
- 3 Tap **Connect Now**

Note: Depending on your account settings, you may be required to enter a security or billing code.


Related Topics

- [Starting a meeting with Call Me](#)
- [Starting a meeting with Dial-In](#)
- [Add user details](#)

Join a meeting

Join a meeting from the Home screen

You can join any meeting you were invited from SmartMeet's Home screen by tapping the

Join Meeting button .

When joining a meeting with Call Me enabled, SmartMeet automatically dials your selected phone number and connects you to the meeting. Call Me numbers can be added, modified, or deleted from the User Details screen.

When joining a meeting with Call Me disabled, you must dial-in to SmartMeet in order to connect to the meeting. SmartMeet comes with a list of international Dial-In numbers to accommodate connections from anywhere in the world.

By default, the primary Dial-In number is the standard local toll free number each meeting profile.

Alternatively, on feature-enabled accounts, you can connect to the meeting using Voice over IP. With VoIP selected, SmartMeet will connect you to the meeting using either your mobile device data plan or your Wi-Fi network, depending on availability.

Note: Meeting creation/starting a meeting is only available to moderators and users with active Accounts.

You can also use the Already Dialed In option to rejoin a meeting in progress that you have previously joined by land line, desktop client, or from outside of SmartMeet.

To join a meeting from the Home screen

- 1 On the home screen, tap **Join a Meeting**
- 2 Select the meeting profile from either the Favorites or History tabs:
If you have added the moderator's meeting profile to your favorites list, tap **Favorites**.
If you have previously attended their meetings but do not have their meeting profile, tap **History**.

- 3** If Call Me is enabled, select a Call Me number:
To change your number, tap the Call Me field and select a new number from the list. To add a new Call Me number, tap the **Manual Entry** button.
- 4** If Call Me is disabled, select a Dial-In number:
To change your Dial-In number, tap the Dial-In Number field and select a new number from the list.
- 5** Tap the **Join Meeting Now** button

To join a meeting with **Already Dialed In** selected

- 1** On the home screen, tap **Join a Meeting**
- 2** Using either Call Me or Dial In, select the **Already Dialed In** option
- 3** Tap **Connect Now**

Note: You may be required to synchronize your connections after joining.

To join a meeting with **Voice over IP (VoIP)** selected

- 1** On the home screen, click **Join a Meeting**
- 2** Select **Use Voice over IP**
- 3** Tap **Connect Now**

If required, enter your security passcode or account credentials

Note: Depending on your corporate policy and account settings, you may only be able to use VoIP while connected to a wi-fi network. If Wi-Fi is mandatory but disabled on your device, enable your Wi-Fi connection and return to the **Join a Meeting** screen.

Related Topics

- [The SmartMeet Favorites List](#)
- [SmartMeet History](#)
- [Add user details](#)

Schedule a meeting

Schedule a meeting from the home screen

You can schedule a meeting from SmartMeet's home screen by tapping the **Schedule Meeting** button.



Meeting scheduling allows for daily, weekly, biweekly or monthly recurrences.

Note: Meeting scheduling is only available to moderators and users with active Accounts.

To schedule a meeting

- 1 On the home screen, tap **Schedule a Meeting**
- 2 Enter a start time
Tap the **Starts** field and choose a date and time
- 3 Set the length of the meeting
Tap the **Duration** field and choose a meeting length
- 4 (Optional) Set a time zone
Note: SmartMeet automatically detects and sets your local time zone as the default
- 5 Schedule recurrences: once, daily, weekly, biweekly, monthly
- 6 Update the Primary Dial-In Number or add a Secondary Dial-In Number if required.
- 7 Add invitees from your mobile device address book or by entering the information manually
- 8 Update the Meeting Calendar that the appointment will be added to. The list of associated calendars are displayed as possible options.

Related Topics

- [SmartMeet Calendar](#)

- [Edit scheduled meeting details](#)

Meeting Management

Adding Participants

Adding participants to an active meeting

Participants can be added to an in-progress meeting in one of two ways:



- Call Now, which dials the participant directly and prompts them to join the meeting (if available for your Account).
- Email/SMS, which sends a text or email message with connection information.

Note: Only the meeting moderator can add users to the meeting.

Invite a participant with Call Now

Participants can be added to the meeting by dialing them on their phone or mobile device. After selecting a participant, they will be dialed by SmartMeet and prompted to join the meeting.



To invite a participant with Call Now

- 1 On the meeting screen, tap the **Add Participants** button 
- 2 Tap **Call Participant(s) Now**
- 3 Begin typing the contact name and select from the dropdown list as it generates; enter a phone number, or
Tap the **Add** button  to browse your contact list
- 4 Click **Done** to send the invitation

Invite a participant with Email and SMS

Participants can be added to the meeting by sending an email or SMS message to their mobile device. After selecting a participant and sending the invitation, they will be sent a meeting invitation containing the information required to connect.

To invite a participant via email or SMS

- 1 On the meeting screen, tap the **Add Participants** button 
- 2 Tap **Quick Invite via SMS/Email**
- 3 Begin typing the contact name and select from the dropdown list as it generates; enter a phone number, email address, or
Tap the **Add** button  to browse your mobile device contact list
- 4 Select your contact's mobile phone number, or enter manually, for an SMS invite, or email address for an email invite
- 5 Click **Done** to send the invitation

Participant Management


Participant management

As a moderator, you can actively manage individual meeting participants through their avatar menu, accessed by tapping their avatar.

The context menu displays the participant's name and phone number, connection status, as well as icons showing options to:

- Mute or unmute the participant
- Rename the participant
- Sync the participant's lines
- Disconnect the participant from the meeting
- Replay the recorded names for participants

Mute or unmute a participant

Moderators can selectively mute participants during a meeting by tapping the **Mute Participant** button in their context menu. Muted participants display a muted status icon  on their avatar.

To mute a participant

- 1 In meeting view, tap the participant's avatar
- 2 On the user's context menu, tap **Mute Participant**

To unmute a participant

- 1 In meeting view, tap the participant's avatar
- 2 On the user's context menu, tap **Unmute Participant**

Rename a participant

Participants can be renamed during a meeting by tapping the **Rename Participant** button in their user context menu. The participant's changed name is seen by other participants in the meeting.

Participants that have been renamed can change their name back to what it was, and the name change will not persist across future meetings. Unlike moderators, participants are only able to change their own names.

To rename a participant

- 1 In meeting view, tap the participant's avatar
- 2 On the user's context menu, tap **Rename Participant**
- 3 Enter a new first and/or last name
- 4 Click **Done** to save the change

Sync web and audio connections

In some circumstances, your audio connection may become unlinked from your avatar.

For example, if you join a meeting by telephone and later connect with SmartMeet, there will be two instances of you in the meeting: one for your SmartMeet avatar connection and one for your audio avatar connection. If this occurs, the two connections can be synchronized.

While moderators can sync any connections in a meeting, participants are only able to sync with their own SmartMeet avatar.

Syncing is accessed through your SmartMeet avatar.

Disconnect a participant

Participants can be dismissed from a meeting by tapping the **Disconnect Participant** button in their user context menu.

There is no confirmation prompt when you disconnect a participant.

To disconnect a participant from the meeting

- 1 In meeting view, tap the participant's avatar
- 2 On the user's context menu, tap **Disconnect Participant**

Related Topics

- [End a meeting](#)

Recording a Meeting

Recording a meeting

If enabled for your account, meetings can be recorded and archived for future reference. When a recording has finished, you will be sent an email containing access information for listening to the archive.

Record a meeting

You can record a meeting from SmartMeet's meeting screen by tapping the **Record** button in the meeting menu. When the recording begins, the **Record** button will change from gray to red. Recording a meeting requires an active Account and may incur additional charges.


To record a meeting

- 1 On the meeting screen, tap the **Record** button




in the

End a meeting recording

You can end a meeting recording from SmartMeet's meeting screen by clicking the **Record** button a second time. 

To record a meeting

- 1 On the meeting screen, tap the **Record** button 
- 2 Tap **Stop Recording**

Waiting Room

The waiting room

Meetings can be locked or unlocked by the moderator to restrict entry by participants. When a meeting is locked, all new participants are redirected to the Waiting Room.



Moderators are notified when participants enter the waiting room. The waiting room tab at the top of the SmartMeet client indicates how many participants are currently awaiting entry, and the moderator can access the waiting room by tapping the Waiting Room tab. While on the waiting room screen, the moderator can admit or dismiss any or all participants.

Participants that have been placed in the Waiting Room cannot listen to or participate in the meeting until they are admitted by the moderator, even if they were previously invited to the meeting and provided the correct connection credentials.

Related Topics

- [Locking and unlocking a meeting](#)
- [Admitting or dismissing users in the Waiting Room](#)

Locking and unlocking a meeting

As a moderator, you can lock or unlock a meeting at any time from the meeting tab. Locking a meeting automatically redirects all incoming users to the waiting room.

To lock a meeting as a moderator

1 On the Meeting screen, tap the **Lock** button



located in the meeting menu

To unlock a meeting as a moderator

1 On the Meeting screen, tap the **Unlock** button



located in the meeting menu

Related Topics

- [The waiting room](#)
- [Admitting or dismissing users in the Waiting Room](#)

Admitting or dismissing users in the waiting room

As a moderator, you can admit or dismiss participants that have been redirected to the waiting room of a locked meeting.

On entering the waiting room, you are given the option of admitting or dismissing an individual participant, or admitting or dismissing all participants currently in attendance. You are also provided the option of sending them chat messages.

To admit all participants in the waiting room

- 1 On the Meeting screen, tap the **Waiting Room** tab
- 2 Tap the **Add All** button to admit all waiting room attendees

To dismiss all participants in the waiting room

- 1 On the Meeting screen, tap the **Waiting Room** tab
- 2 Tap the **Disconnect All** button to disconnect all waiting room attendees

To admit an individual participant in the waiting room

- 1 On the Meeting screen, tap the **Waiting Room** tab
- 2 Tap the avatar of the user you want to admit to the meeting
- 3 Tap the **Add Participant**

To dismiss an individual participant in the waiting room

- 1 On the Meeting screen, tap the **Waiting Room** tab
- 2 Tap the avatar of the user you want to dismiss from the waiting room
- 3 Tap the **Disconnect Participant**

To post a chat message in the waiting room

- 1 On the Meeting screen, tap the **Waiting Room** tab

- 2 Tap the **Chat** icon above the meeting room status bar and type your message

Related Topics

- [The waiting room](#)
- [Locking and unlocking a meeting](#)

Chatting

Both the moderator and participants have the ability to chat with others in the meeting room. Chat sessions can be one-to-one, one-to-many or addressed to everyone in the meeting.

The moderator is also able to use Chat to post a message in the waiting room.

Chat messages are not stored and will only be accessible while the meeting is ongoing.


To send chat messages

- 1 On the Meeting screen, tap the **Chat** button located above the meeting status bar.
- 2 Tap the **Write New Message** icon at the top right hand of the screen.
- 3 Select the list of participants you would like to send your chat message to, or choose **Select All Participants** if sending to everyone on the call.
- 4 Type your message and press **Send**.

To view or reply to received messages

- 1 On the Meeting screen, tap the **Chat** button located above the meeting status bar. All active chats within the meeting will be listed there and select which chat you wish to read or reply to.


View meeting information

You can view meeting information from the Meeting tab by tapping the **Info** button , located in the top right of the meeting status bar.

The Meeting Info page displays relevant meeting information, including:

- Meeting title
- Meeting start time and recurrences
- Dial-In numbers
- Conference codes
- Recording status
- Lock/unlock status
- Scheduling notes

To view meeting information

1 On the Meeting screen, tap the **Info** button . Click **Done** to return to the Meeting screen.


End a meeting

As a moderator, you can end a meeting from the Meeting screen by tapping the **Disconnect** button



You will be prompted to choose either to disconnect yourself and leave the meeting running, or to disconnect all participants and close the meeting.

To end a meeting as a moderator

- 1 On the Meeting screen, click the **Disconnect** button 
- 2 Select your End Meeting option:
End Meeting (disconnect all): Disconnect all meeting participants and close the meeting.
Hang Up: Disconnect from the meeting but leave the meeting running with the other participants connected.

Related Topics

- [Exit a meeting](#)

Exit a meeting

As a participant, you can exit a meeting from the Meeting screen by tapping the **Disconnect** button



The meeting will continue after you have disconnected and can only be closed by the moderator.

To exit a meeting as a participant

- 1 On the Meeting screen, tap the **Disconnect** button
- 2 Tap **Hang Up** to disconnect




Related Topics

- [End a meeting](#)

Calendar SmartMeet

calendar

The SmartMeet calendar displays a list of meeting appointments saved on your associated device calendars, whether or not they have been scheduled through SmartMeet. To view the calendar, tap the **Calendar** button  on the SmartMeet home screen or in the options menu (Android).

From SmartMeet Calendar, you can:


- **View a list of scheduled meetings**
By default, the Calendar displays a list of upcoming meetings, organized by start time.
- **Start or connect to a scheduled meeting**
From the Calendar, you can start a scheduled meeting by tapping the quick launch button next to the meeting title.
- **Schedule a new meeting**
From the Calendar, you can schedule a new one-time or recurring meeting and invite contacts to attend.
- **View meeting details**
Tapping a meeting in the list opens a meeting information page with details including meeting start and end time, recurrence, and Dial-In numbers.
- **Edit a scheduled meeting**
Change the date and time of the meeting, and add or remove invitees
- **Delete a meeting**
From the Calendar you can delete a meeting that has been previously scheduled.

Schedule a meeting from the calendar

Meeting scheduling allows for daily, weekly, biweekly or monthly recurrences, pre-set invitee lists, and calendar integration with your mobile device.

Note: Meeting scheduling is only available to moderators and users with active Accounts.

To schedule a meeting

- 1 On the calendar screen, tap and hold to select **Add** in the options menu (Android) or select the + button  .
- 2 Enter a start time
Tap the **Starts** field and choose a date and time
- 3 Set the length of the meeting
Tap the **Duration** field and choose a meeting length
- 4 (Optional) Set a time zone and tap **Done**
Note: SmartMeet automatically detects and sets your local time zone as the default
- 5 Schedule recurrences: once, daily, weekly, biweekly, monthly
- 6 Add invitees from your mobile device address book or by entering the information manually
- 7 Update the Primary Dial-In Number or add a Secondary Dial-In Number if required
- 8 Select the associated device calendar you wish the meeting to be added to.

Related Topics

- [Edit scheduled meeting details](#)

Start a meeting from the calendar

You can start a scheduled meeting from the SmartMeet Calendar.

To start a meeting from the Calendar

- 1 On the calendar screen, tap a meeting entry
- 2 Tap **Start Meeting Now**

To start a meeting with Call Me

- 1 Select a Call Me number:
To change your number, tap the Call Me field and select a new number from the list. To add a new Call Me number, tap the **Manual Entry** button.
- 2 Tap the **Start Meeting Now** button

To start a meeting with Dial-In

- 1 Select a Dial-In number:
The default number is your primary toll-free dial-in.
To change your Dial-In number, tap the Dial-In Number field and select a new number from the list.
- 3 Tap the **Start Meeting Now** button

Related Topics

- [Start a meeting with Call Me](#)
- [Start a meeting with Dial-In](#)

Delete a meeting from the calendar

You can delete a scheduled meeting from the SmartMeet Calendar.

If you delete a meeting that you have scheduled, an update is sent to the invitees to notify them of the cancellation.

To delete a meeting from the calendar

- 1** On the calendar screen, tap the meeting entry you want to delete, tap the **Edit** button (iPhone) or tap and hold to select edit (Android)
- 2** Scroll to the bottom of the edit screen and tap **Delete Meeting**
- 3** Tap **Delete Meeting** again to confirm

View meeting information from the calendar

You can view meeting information for a scheduled meeting from the calendar. The meeting information page includes details on the meeting topic, start and end times, recurrence, dial-in numbers, and scheduling notes.

To view meeting information

- 1 On the calendar screen, tap a meeting entry

Related Topics

- [View meeting information](#)

Edit scheduled meeting details

If you are the moderator of the scheduled meeting, you can make edits to the details on the Meeting Information screen.

Editing the meeting information may be useful for rescheduling or changing the meeting topic. Notifications are sent to invitees whenever the meeting information is altered.

To edit meeting details from the information screen

- 1** On the calendar screen, tap a meeting entry and tap the **Edit** button (iPhone) or tap and hold to select **Edit** (Android)
- 2** Tap the relevant fields and make the necessary edits
- 3** Tap **Done** to save the changes

Related Topics

- [Schedule a meeting](#)

Favorites

The SmartMeet Favorites List

The SmartMeet Favorites list allows you to create a list of favorite meeting profiles that you connect to frequently. The Favorites list is particularly helpful for managing and connecting to meetings that were scheduled outside of the SmartMeet application.


To access your favorites list, tap the **Favorites** button on the SmartMeet home screen. From SmartMeet Favorites, you can:

- **View a list of favorite meeting profiles**
The Favorites list displays all meeting profiles that you have added either manually or from the meeting history, sorted alphabetically.
- **Manually add a meeting profile to the list**
SmartMeet allows you to manually add a meeting profile. This is useful for adding profiles you have not already attended, or for adding colleagues' profile information.
- **Automatically add a meeting profile from your meeting history** SmartMeet allows you to import a profile from your meeting history. Adding a profile from your meeting history will automatically populate their meeting profile fields, including their Dial-In numbers and conference codes.
- **Delete an entry from the list**
From the Favorites list, you can delete an entry at any time.
- **Modify entry details**
SmartMeet allows you to modify or update the details of any entry on the list.

Add a meeting profile from your meeting history

You can add a meeting profile to your Favorites list from your meeting history. Adding from your meeting history automatically populates the profile details for the entry, including the conference code and Dial-In numbers.

To add a meeting profile to the Favorites list from your meeting history

- 1 On the Favorites screen, tap the + button  (iPhone) or tap the options menu (Android)
- 2 Tap **Add From History**
- 3 Browse your meeting history and select the desired meeting profile
The meeting history list is sorted chronologically and separated by week
- 4 If required, add a first or last name
- 5 If required, change the dial-in number
- 6 Verify the meeting information and tap **Done**


Related Topics

- [Add a user manually](#)

Add a meeting profile manually

If you want to add a profile to your Favorites list for a meeting that you have not yet attended, you must manually add the meeting profile information.

To manually add a user to the Favorites list

- 1 On the Favorites screen, tap the + button 
- 2 Tap **Add Manually**
- 3 Complete the required fields:
 - First name
 - Last name
 - Dial-In Number
 - Conference Code
 - (Optional) Notes
- 4 Tap **Done**

Related Topics

- [Add a user to your Favorites list from history](#)

Edit Favorites List entries

You can edit meeting profile information in your Favorite List by tapping the entry (iPhone) or tapping and holding the entry (Android) and selecting **Edit** in the options menu (Android).

Editable fields include:

- First name
- Last name
- Dial-In number
- Conference Code
- Notes

From the Edit menu, you can also elect to delete the profile entry.

To edit meeting profile information in the Favorites List

- 1 On the Favorites screen, tap the name of desired profile
- 2 Tap **Edit** (iPhone) or tap the options menu and select **Edit** (Android)
- 3 Tap the relevant fields and make the required edits
- 4 Tap **Done** to save the changes

Related Topics

- [Delete a Favorites List entry](#)

Delete a Favorites List entry

You can delete a Favorites list entry from the entry edit page.

To delete a Favorites list entry

- 1 On the Favorites screen, tap the name of desired user
- 2 Tap **Edit** (iPhone) or tap the options menu and select **Edit** (Android)
- 3 Scroll to the bottom of the Edit page and tap **Delete Favorite**
- 4 Tap **Delete Favorite** again to confirm

Related Topics

- [Edit Favorites List entries](#)

Join a meeting from the Favorites list

You can join a meeting from the Favorites list by selecting a meeting profile and tapping **Join Meeting Now**.

To join a meeting from the Favorites List

- 1 On the Favorites screen, tap the desired meeting profile
- 2 Tap **Join Meeting Now**

To join a meeting with Call Me

- 1 Select a Call Me number:
To change your number, tap the Call Me field and select a new number from the list. To add a new Call Me number, tap the **Manual Entry** button.
- 2 Click the **Start Meeting Now** button

To join a meeting Dial-In

- 1 Select a Dial-In number:
The default number is your primary toll-free dial-in.
To change your Dial-In number, tap the Dial-In Number field and select a new number from the list.
- 2 Click the **Start Meeting Now** button

To join a meeting with Voice over IP (VoIP)

- 1 Select **Use Voice over IP**
- 2 Tap **Connect Now**

Note: Depending on your corporate policy and account settings, you may only be able to use VoIP while connected to a Wi-Fi network. If Wi-Fi is mandatory but disabled on your device, enable your Wi-Fi connection and return to the **Join a Meeting** screen.


Related Topics

- [Start a meeting with Call Me](#)
- [Start a meeting with Dial-In](#)

History

SmartMeet History

The SmartMeet History screen tracks your recent meetings and sorts them chronologically. To access

the history page, tap the **History** button .

From SmartMeet History, you can:

- **View a list of recently attended meetings**
The history page lists all your recent meetings in chronological order and sorted by week.
- **Add a meeting to your favorites list**
From the history page, you can add a meeting to your favorites list.

Add a history entry to favorites

You can add a meeting profile Favorites list from your meeting history. Adding from your meeting history automatically populates the details for the entry, including the conference code and Dial-In numbers.


To add a user to the Favorites list from your meeting history

- 1 On the History screen, tap the desired meeting profile
- 2 Tap **Add to Favorites**
- 3 Confirm the pre-populated Dial-In Number and Conference Code
Tap the fields to make any required changes and then tap **Done** to save
- 4 When finished, tap **Done**

Delete a history entry

You can delete a history entry from the History page.

To delete a favorites list entry

- 1 On the Favorites screen, swipe the desired history entry (iPhone) or tap and hold (Android)
- 2 Tap the **Delete** button A red rectangular button with the word "Delete" in white text.
- 3 Tap **Ok** to confirm

Settings SmartMeet

Settings

From the SmartMeet Settings screen, you can view and modify application settings such as your Account details, contact details, application password, and customer support information.

To access the history page, tap the **More** button (iPhone) or the **Options** menu (Android) and select the **Settings**



option.

About

The About menu lists the current product version as well as trademark and copyright information for the West SmartMeet application.

Set an Account

The Account page displays your selected Account information if you have provided one. You can also make any necessary edits to your account from this page.

Adding an Account allows you to schedule and create meetings, and enables moderator features such as meeting control.

To add an Account from the Home screen

- 1 Swipe the Selected Account bar down
- 2 Tap **Add Meeting Account**
- 3 Enter your Account information
- 4 Turn Call Me **On** or **Off**

Note: In order to turn Call Me **On**, the Call Me setting under the User Details page (Settings>User Details) should be **On**.

- 5 Turn Push Notifications **On** or **Off**.

Push notification is a feature that notifies you when a participant enters your music on hold room, prompting you to start your meeting.

- 6 Tap **Next**
- 7 Select your default Dial-In number and tap **Finish**

To modify an Account

- 1 Select Settings on SmartMeet
- 2 Select Account under settings to display your account information
- 3 Tap the field you want to modify
- 4 Tap **Done** to save the changes

To delete an Account from the Home Screen (Android)

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- 1 Swipe the Selected Account bar down
- 2 Tap and hold the desired account to delete
- 3 Tap delete

To delete an Account from the Home Screen (iPhone)

- 1 Swipe the Selected Account bar down
- 2 Swipe the selected account button
- 3 Tap **Delete Account**

Push notifications

Push notification is a feature that notifies you when a participant enters your music on hold room, prompting you to start your meeting. You will receive a second notification 5 minutes after first if you have not yet started your meeting, or have yet to view the first push notification.

You will be prompted to set this up during initial set-up of the application. You can also turn push notifications on or off through the settings page.

To edit your Push Notification Settings

- 1 Go to **Settings** and tap **Account**
- 1 SAAt the bottom of the screen displaying your Account details, toggle Push Notifications **On** or **Off**

User details


The user details page lists the user information used to join meetings, or that appears to others in meetings, such as your first and last name.

The user details page also lets you toggle Call Me and Voice over IP on or off for all meetings started or joined with SmartMeet.


To edit your user details

- 1 On the user details page, tap the desired field (Android) or tap the **Edit** button (iPhone)
- 2 After making the required edits, tap **Done** to save


To delete a Call Me number

- 1 On the user details page, swipe the number you wish to delete
- 2 Tap the **Delete** button 
- 3 Tap **Ok** to confirm

To enable or disable Call Me

- 1 On the user details page, enable or disable Call Me by swiping the toggle to **On** or **Off** (iPhone) or check/uncheck the Call Me box (Android) 

To enable or disable Voice over IP

- 1 On the user details page, enable or disable VoIP by swiping the toggle  to **On** or **Off** (iPhone) or check/uncheck the Voice over IP box (Android)

Application password

The application password is an alphanumeric password of at least 6 digits long that you will be prompted to enter every time you launch or access SmartMeet on your mobile device. You will also have the option to set the password to expire every 30 days, at which time you will be prompted to update your Application Password.

To enable or disable Application Password

- 1 Go to **Settings**
- 2 Tap **App Password**
- 3 Toggle App Password **On** or **Off**

Note: You must provide your saved password to disable Application Password. If you are enabling Application Password, you will be prompted to verify your password by entering it again. If your company set Application Password as mandatory, you cannot disable Application Password and must provide a password to use SmartMeet.

To enable or disable Password Expiration

- 1 Go to **Settings**
- 2 Tap **App Password**
- 3 Toggle Password Expiration **On** or **Off**

Note: You must provide your saved password to disable Password Expiry. If you are enabling Password Expiry, you will be prompted to verify your password by entering it again.

Support

The support page lists the telephone numbers and email addresses for customer support, sorted by country.

To contact customer support from the support page

- 1** On the support page, tap the customer support entry for your country
- 2** Select either **Call (Number)** or **Email**