



User Guide

8.0.3

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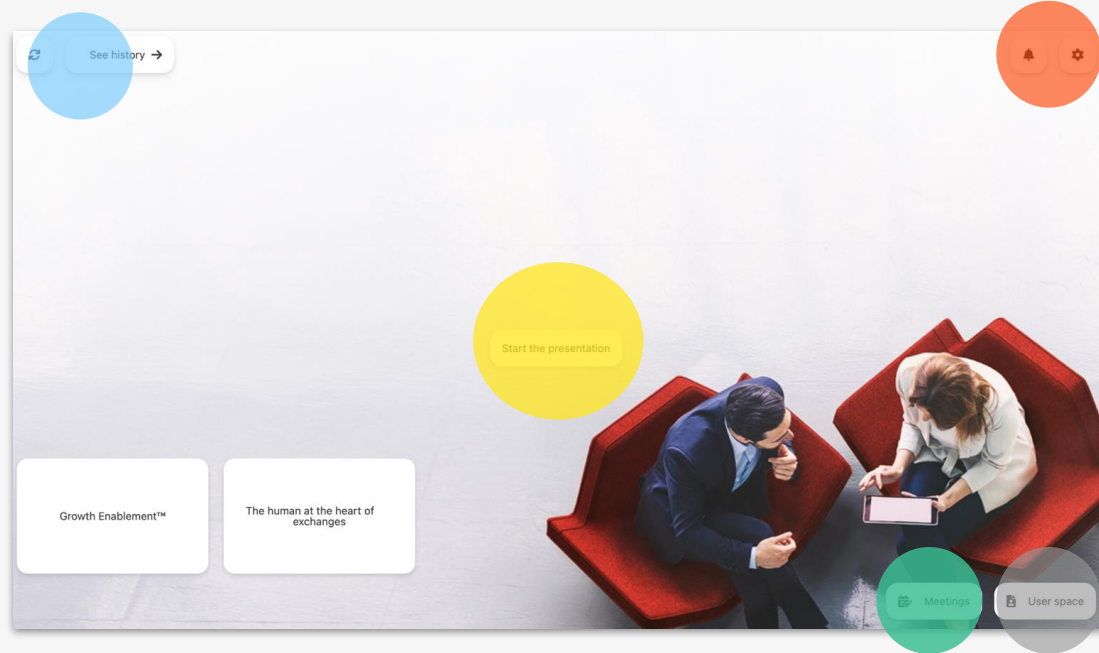
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Homepage



The Homepage in 5 zones:

1.  [Access to new content/Synchronisation](#)
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Homepage | Access to content / Synchronisation

Synchronisation is automatic when the application is launched. It enables you to retrieve all content made available by your administrator. You're sure to have access to the most recent content!

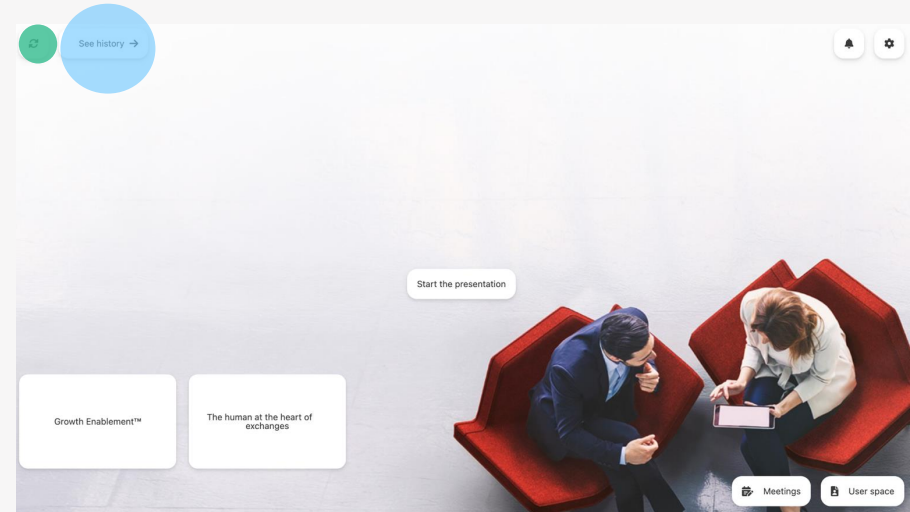
Once it's synchronised, all your content is available "offline".

In the upper left-hand corner, you have access to information on your synchronisation.

The two buttons are dynamic. You'll be alerted in the event of error; a blue disc will appear if you have new content.

[Access to synchronisation history](#)

A button to launch a synchronisation





Homepage | Synchronisation history

This section gives access to:

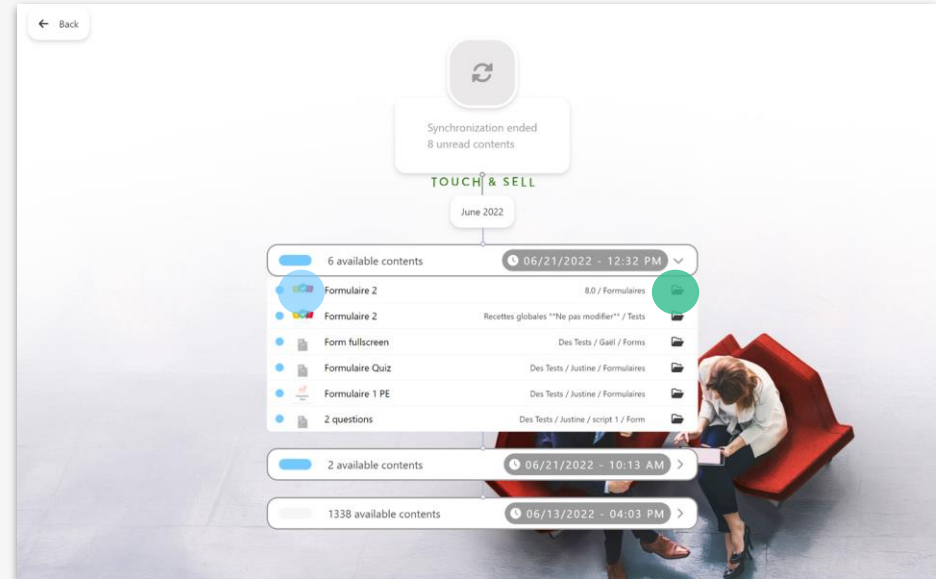
- dates of synchronisations
- lists of synchronised elements

It's possible to:

Consult new content: click on the miniature and the content opens. You can return to the synchronisation section by closing content using the “Back” button.

See content in context: click on the path and the content is presented in its folder; the user's focus is on the content.

When an item of content is opened, it's marked as read. All content can be marked as read from the full list of the synchronisation event.



Homepage | The Start Presentation button

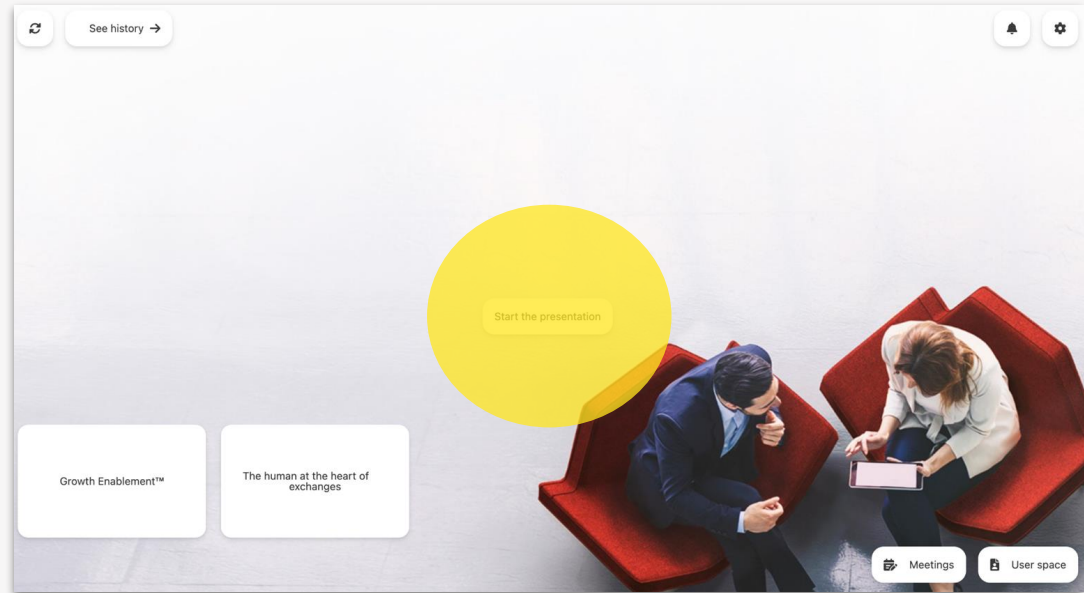


The button in the middle of the page enables you to start a presentation.

When you do so, the application memorises all the documents consulted during the presentation.

Once the presentation is over, the documents reviewed will be made available for sharing with your interlocutor.

All you need do is check your content, add to it if necessary, and send it all via a pre-drafted email with a simple click!



Homepage | Access to settings/notifications



In the upper right-hand corner, you can access notifications and your application's settings.

The first button gives you access to [the notifications screen](#).

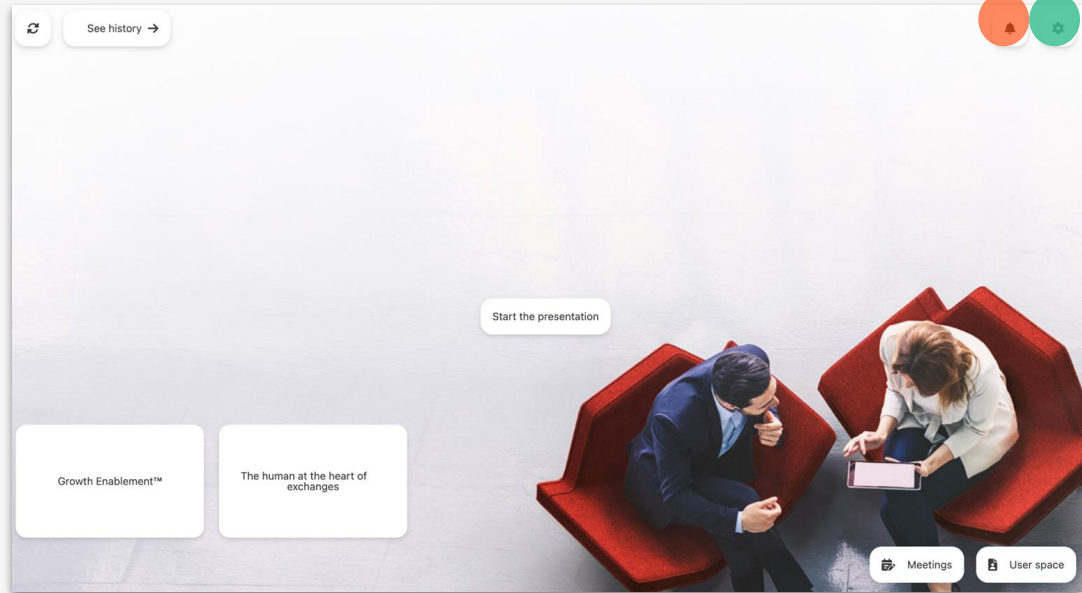
The second button gives you access to [the settings screen](#).



New notifications are indicated by a red disc.



When an update is available, it's indicated by a green disc.





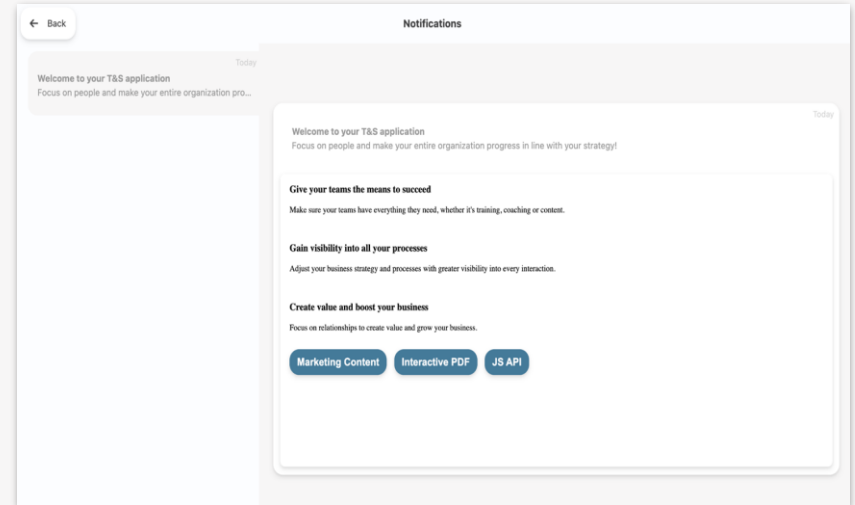
Homepage | Notifications

A notification enables you to receive a **communication from your administrator**.

They can't be deleted. You have access to new and old notifications alike.

When a notification is received or unread, a red disc is added to the application's icon and menu until it's opened.

Very practical when it comes to being informed of the availability of new content!

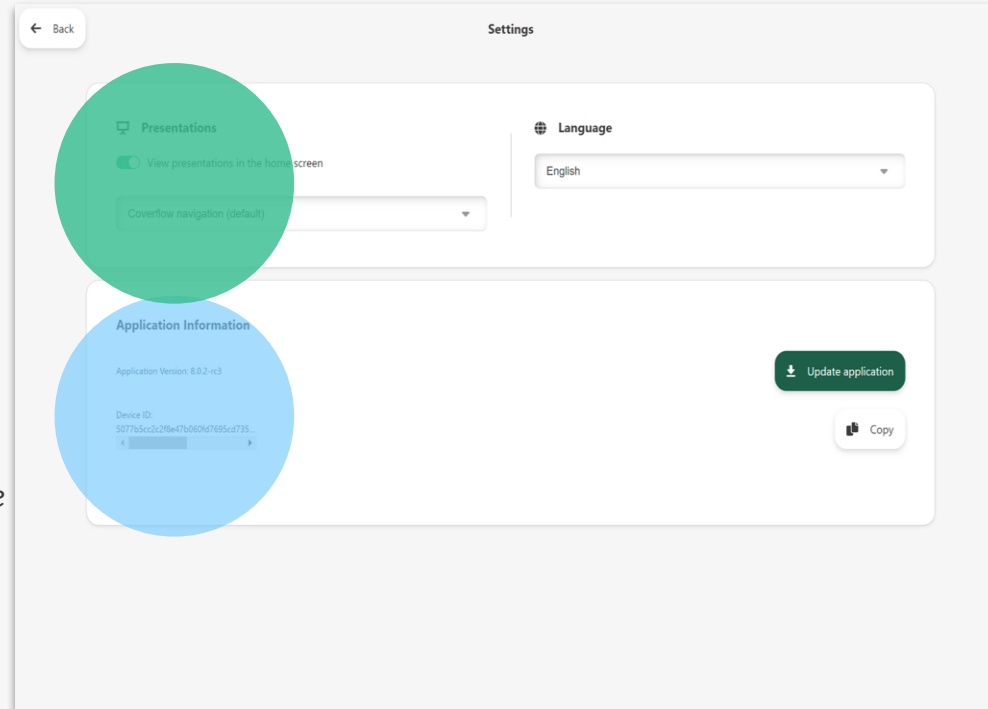




Homepage | Settings

- **personalise** your app's **graphic features**
 - Display appointments on homepage
 - Browsing mode
- **technical information** on your application
 - Application version
 - Device ID

NB: inform your administrator of this number in order to save time if you encounter a problem on your device.





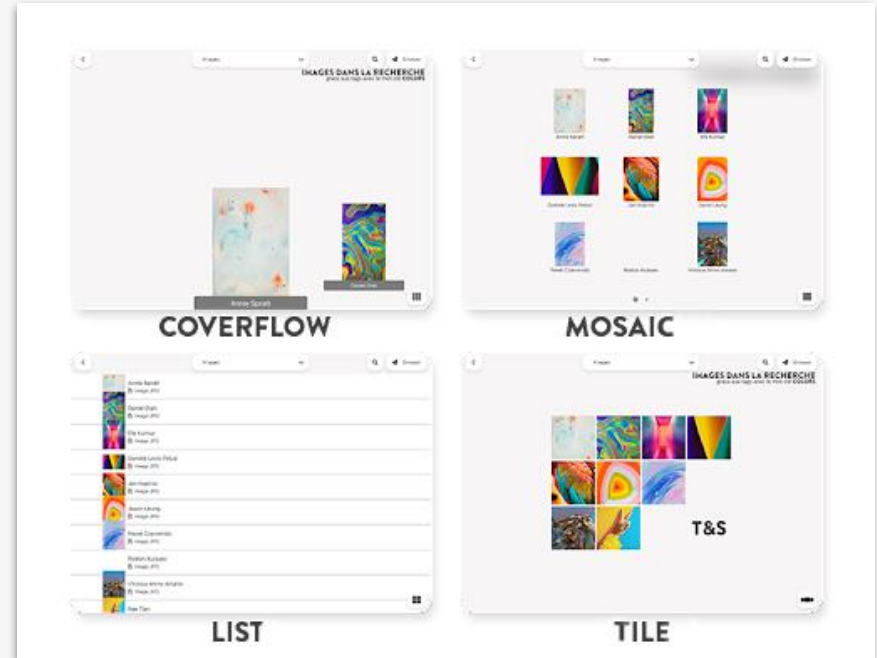
The 4 Browse Modes

You have the choice of 4 browse modes:

- **COVERFLOW** (horizontal scrolling, carousel)
- **MOSAIC** (9 tiles with pagination)
- **LIST** (vertical scrolling of thumbnails + names)
- **TILE** (all components are displayed on the screen untitled)

For a specific folder or prepared presentation, you can change the browse mode by clicking on the button accessible in the menu (the button changes appearance depending on the next browse mode).

NB: your administrator can impose a browse mode for all folders.



Browsing in the tree structure | 1/3

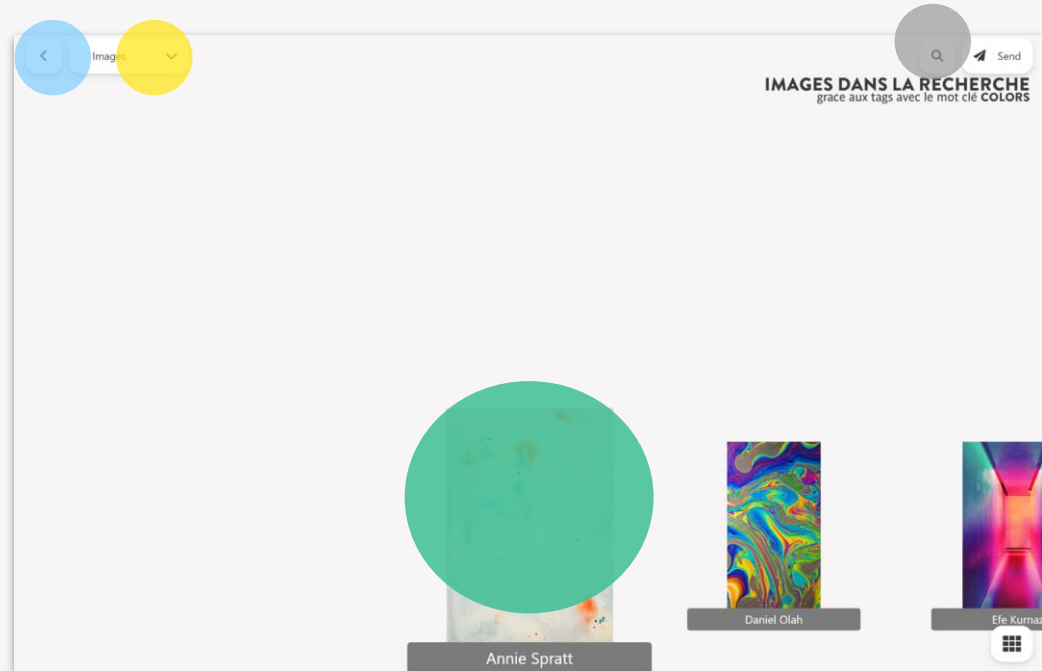
Browsing within the tree structure is a simple operation:

To **enter** a folder or item of content, simply click on it.

To **return to the previous screen**, click on the Back chevron in the upper left-hand corner.



To **browse in the tree structure**, click on the breadcrumb trail.

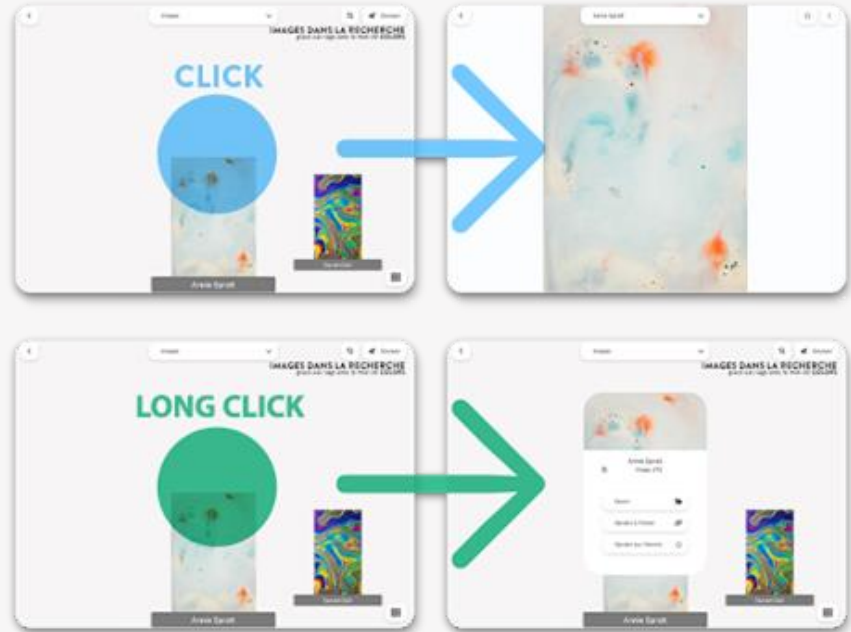
To **browse via search**, click on the magnifying glass in the top right-hand corner. Your favourite content is directly available.








Browsing in the tree structure | 2/3

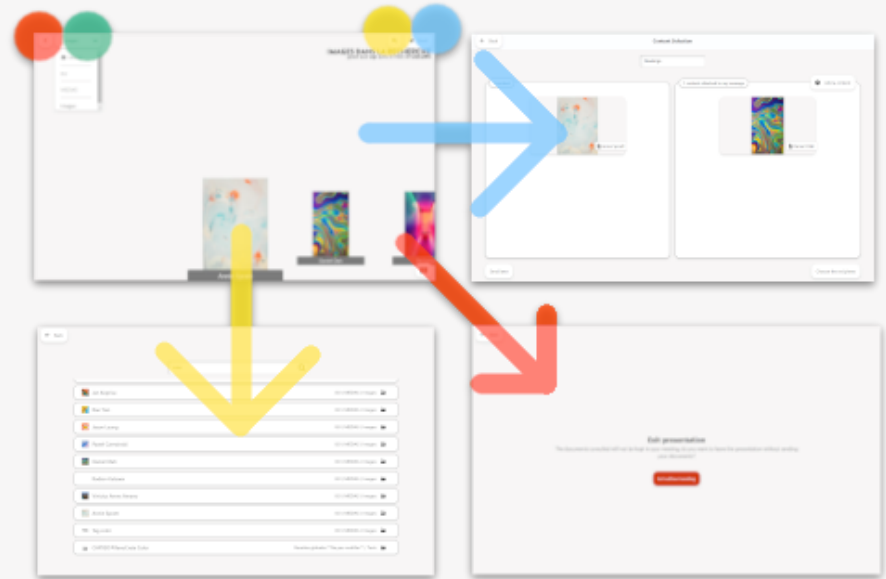
The following actions are possible on the thumbnails:

-  Short click: opens the folder or content
-  Long click: opens the context menu
(*Open document / Add to Send / Add to Favourites / Reload a modified PDF*)



Browsing in the tree structure | 3/3

-  **Closes the presentation** and returns to homepage: content added to the communication will be lost along with annotations.
-  **Dropdown menu:** know your location and browse among the various folders using the breadcrumb trail.
-  **Search in content and folders:** by title or by “tag”.
-  **Send:** access the content sharing screen.
-  **Change browse mode**



Offline Mode

With your application, you can consult content at any time, even when you're offline.

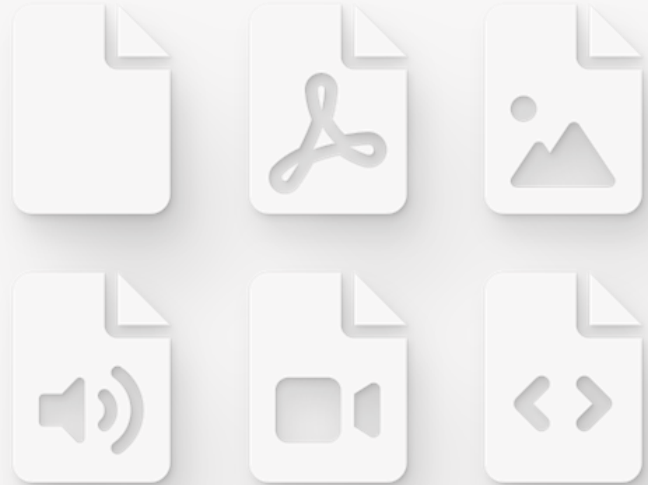
Once you've carried out synchronisation with an Internet connection, you can consult your application in offline mode, with the certainty that all your documents are up to date and downloaded onto your devices.



Supported content

The application enables you to read many different types of documents:




- Office: in Viewer mode only, possibility of opening outside the application, in order to edit docx, xlsx, csv and pptx
- Media: mp3, wav, mp4, mov, m4v, mkv, avi, mpeg and mpg. Note that Flash Player has been disabled since January 2021
- Images: jpg, png, gif, jpeg and svg
- Interactive: PDF, Forms, Quizzes, and Web

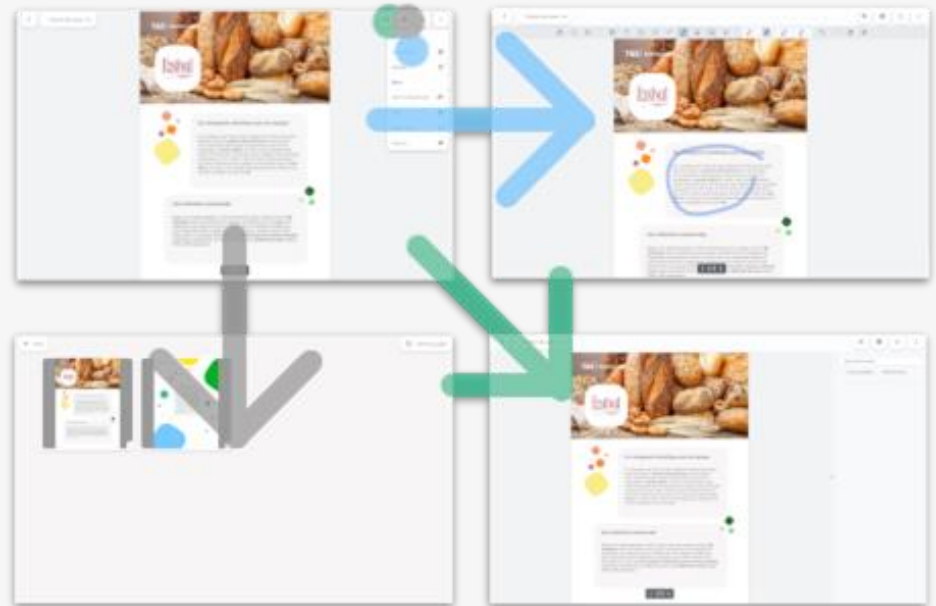


Managing a PDF | 1/2





Various options are available for editing and sharing PDF content:

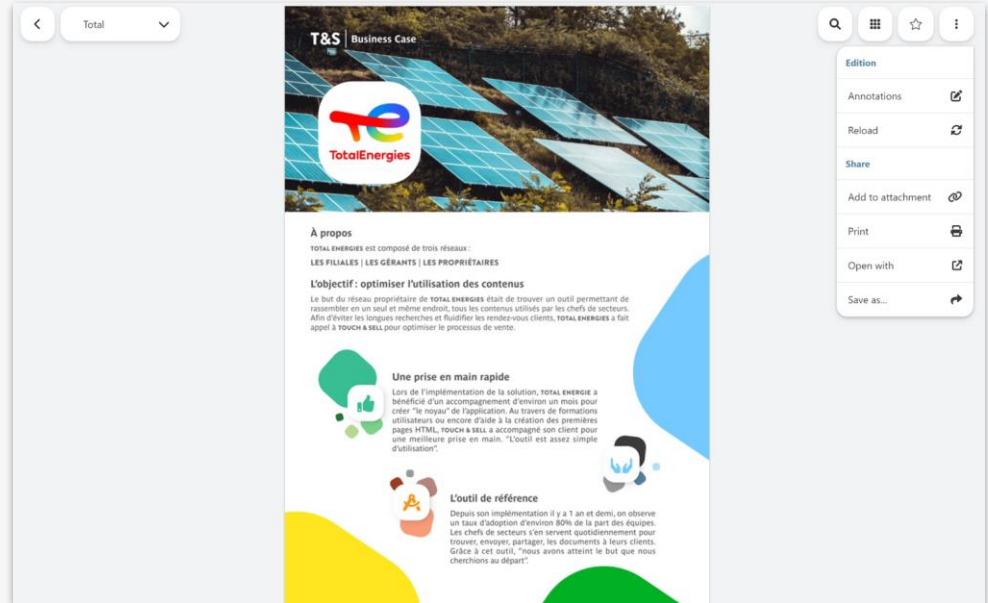
-  Annotations: it's possible to make various annotations to content: text, highlighting, signature, image, etc. The original document remains unchanged.
-  Delete pages: select the pages that interest you in order to share relevant content. Click on the mosaic and you can browse and select pages.
-  Search for a term in the document by clicking on the magnifying glass; text entry enables rapid browsing in an item of content.



Managing a PDF | 2/2

When viewing a PDF, various actions are possible:

-  Add to attachment: enables you to select content to share with your contact.
-  Open with: this feature opens the document in the corresponding application, so that it can be managed outside the application.



Microsoft Office content

Office content can be read from the application.

Editing is carried out from the “Ouvrir avec” (Open with) secondary menu. You can open content in an application dedicated to content editing. Resulting edits will not be stored in the application.

It's also possible to search within the document.

NB: contact your administrator if you don't have access to this feature.



Media

Audio, video, image... all the most popular forms of content can be used with the application.

Content can be looped, depending on the Studio's options ("tag loop").



Forms

Form content enables data to be sent back direct from the field.

It's also possible to send back media (videos, images, signature) and quiz-type data.

Answers to questions are communicated to the back office for exploitation by your administrator.

Formulaire 1

Texte simple obligatoire *

T

Texte long *

Formulaire simple

Photo

Ajout photos, vidéos et signature

Ajouter photos Ajouter vidéos Signature

Q1

a b

c

Topics

HealthCare Cosmetic

Dental Animals

Surgery Pharmacy

Formulaire 1

Titre de la question Question avec un titre de question très long le permettant de passer à la ligne et pourquoi pas deux fois aller d'être content avec Question avec un titre de question très long le permettant de passer à la ligne et pourquoi pas deux fois aller d'être content sure

répondre

Sharing | Selecting content

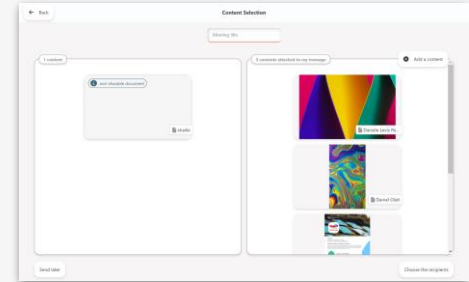
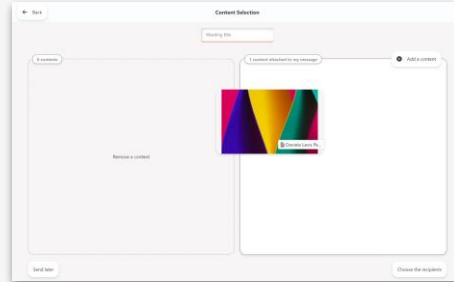
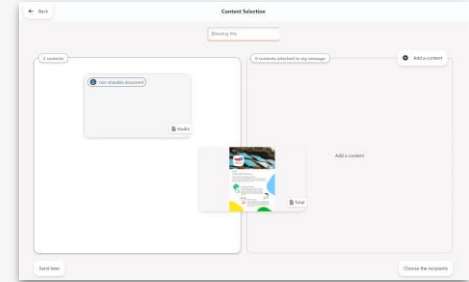
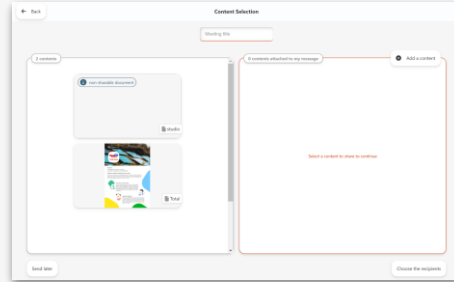
At the end of a presentation, all content viewed during your presentation is grouped together on a screen.

You can consult and select it before sending.

To add content, you can:

- Select an item of content and slide it into the right-hand column Content attached to message
- Search for an item of content by clicking on the Add content button

To confirm the selection, the user can give their presentation a title.



Sharing | Adding recipients

After selecting content, you can add as many recipients as necessary.

Information complementary to the email can be added:

- Name
- Position
- Telephone number

This information can be synchronised with the company's CRM.

The screenshot shows a mobile application interface titled "Information about recipients". At the top left is a "Back" button with a left-pointing arrow. Below the title, there is a "Company name" input field. On the left side, there is a contact card for "quentin.gourdon@gmail.com" with fields for Name (Quentin), Position (GOURDON), Job, and Telephone number (0768704270). On the right side, there is a large dashed box containing a person icon and the text "Add another recipient". At the bottom right, there is a "Compose your message" button.

Sharing | Composing your message

The user can personalise their message on the message composition page.

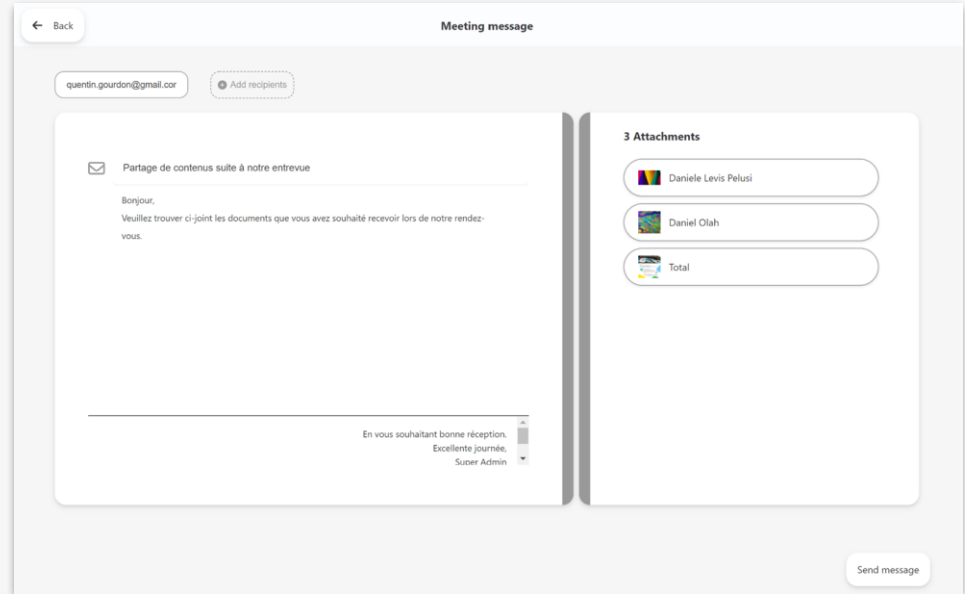
Information (Subject, message body and signature) can be synchronised from the Studio depending on the solution's settings.

These fields remain personalisable at this stage.

Content attached to the message is displayed; it's possible to consult it before sending.

When you click on the Send button, an email will be sent to your interlocutors.

The user can find the exchange concerned in the Appointment Options' "Archives" section.

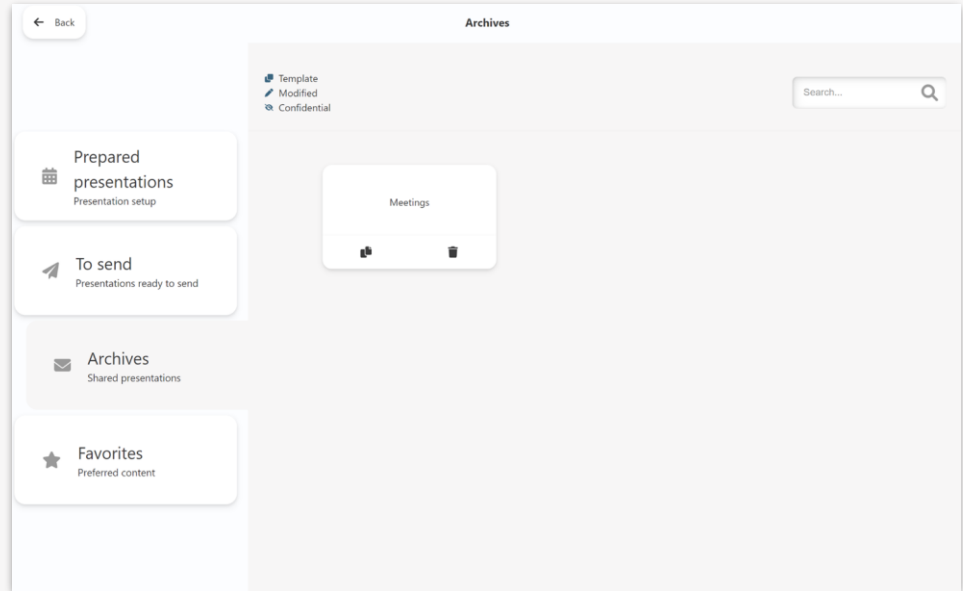


Sharing | Sharing content, continued

The “Archives” section in Appointment Options contains all shared content.

When you share content, your recipient receives an email containing a link to a personalised webpage from which they can download all documents viewed and selected.

You’re informed by email when your contact consults and/or downloads content.

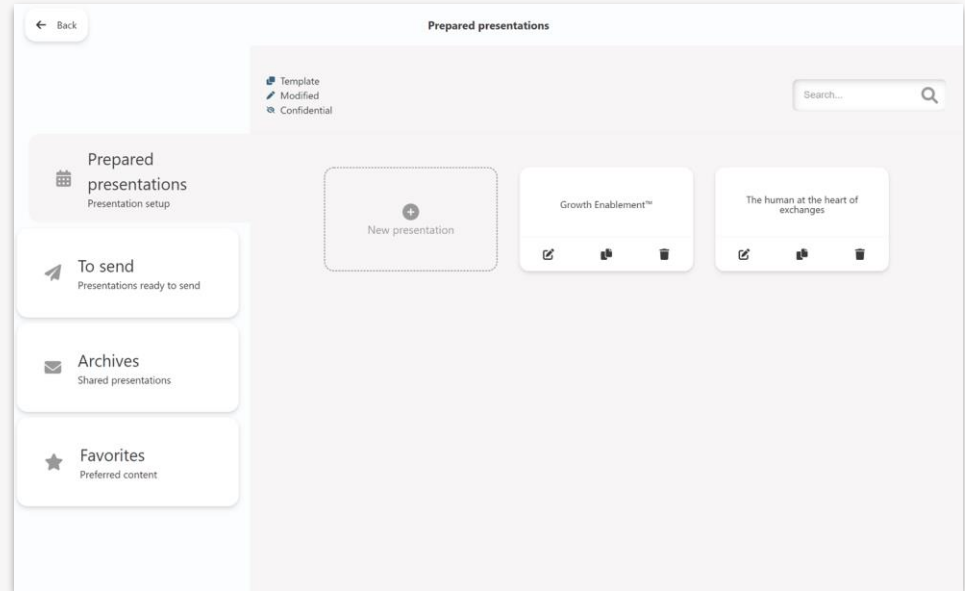




Presentations

There are 3 different statuses:

1. **Prepared:** this is a presentation prepared by the user.
1. **To send:** this is a presentation that's been recorded in order to be sent later, after an appointment, with the possibility of modifying the attached content and personalising the message before sending.
1. **Archives:** this is content already shared. The user finds all content viewed during the appointment, content shared and the message.





Prepared Presentations

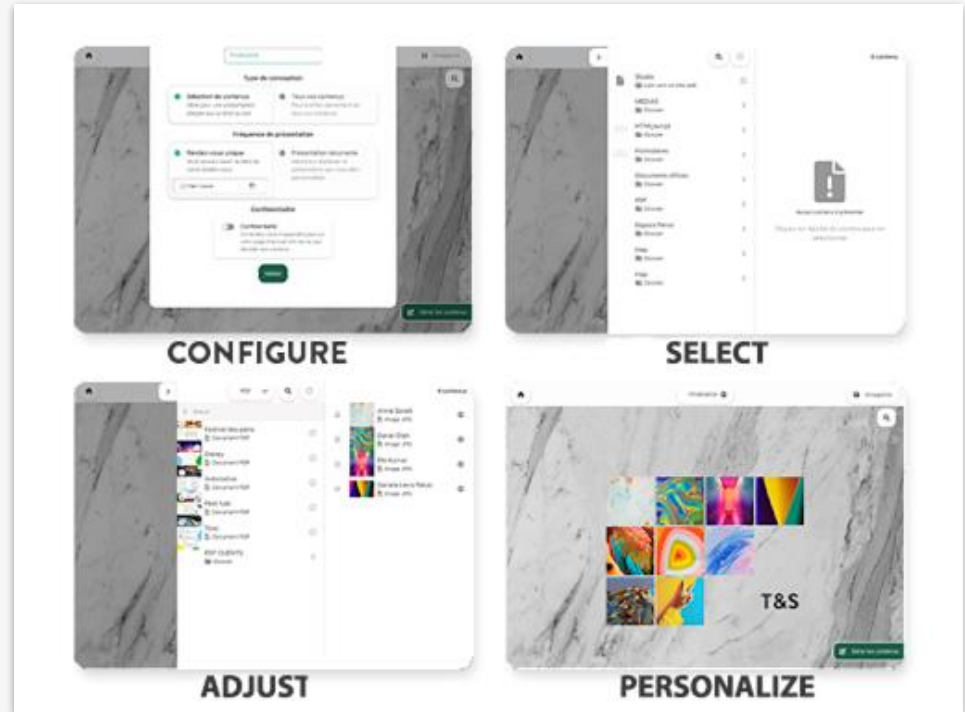
Presentation preparation enables you to select content prior to your appointments.

The configuration provides for two types of creation.

Selection provides for list browsing in the application's tree structure. Searches as well as breadcrumb browsing are possible, as in a presentation.

Adjustments are possible, providing for sorting of appointment components and removal of this or that component.

Content personalisation is possible. You can also browse in your personalised appointment.





Creating presentations | 1. Configuring

The first appointment creation screen presents all the settings available for an appointment.

You must enter a title.

You can then choose your type of design: “Content selection” or “All your content”.

You can personalise content for a specific appointment, mixing it with all available content.

You can then choose your “Presentation frequency”: “Single appointment” or “Recurrent presentation”. A recurrent presentation can be very useful for repetitive formats.

The appointment can be confidential, in which case it won’t be displayed on the homepage, but only on the appointment management screen.

The screenshot displays a configuration modal titled "Finalisation" for creating an appointment. The modal is overlaid on a background image of two people sitting on red chairs. The configuration options are as follows:

- Finalisation** (Title input field)
- Type of design**
 - Contents Selection**
Ideal for a streamlined presentation that gets straight to the point
 - All your contents**
To take full advantage of all your content
- Frequency of presentation**
 - Unique appointment**
You can enter the date of your appointment
11/mm/yyyy
 - Recurrent presentation**
Ideal for duplicating the presentation you are going to customise
- Confidentiality**
 - Confidentiality**
This appointment will not appear on your homepage so as not to reveal its content
- Validate** (Green button)
- Save** (Top right button)
- Manage contents** (Bottom right button)



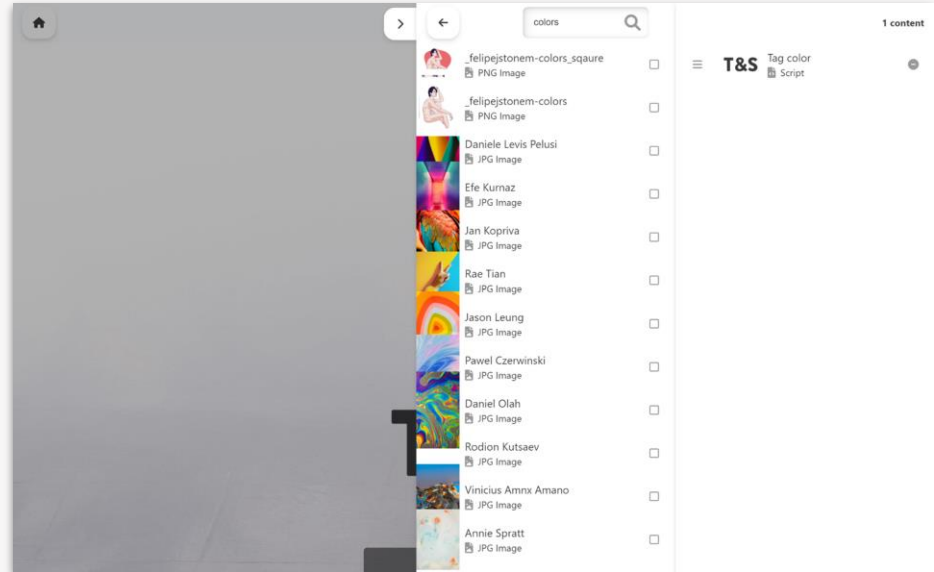
Creating presentations | 2. Selecting

Once the form has been completed and confirmed, you'll have access to the content selection panel.

You browse using the breadcrumb trail, by searching, or by clicking in your tree structure.

When content is ticked, it's added to your appointment's recap screen.

You can: Add, Delete, Sort.





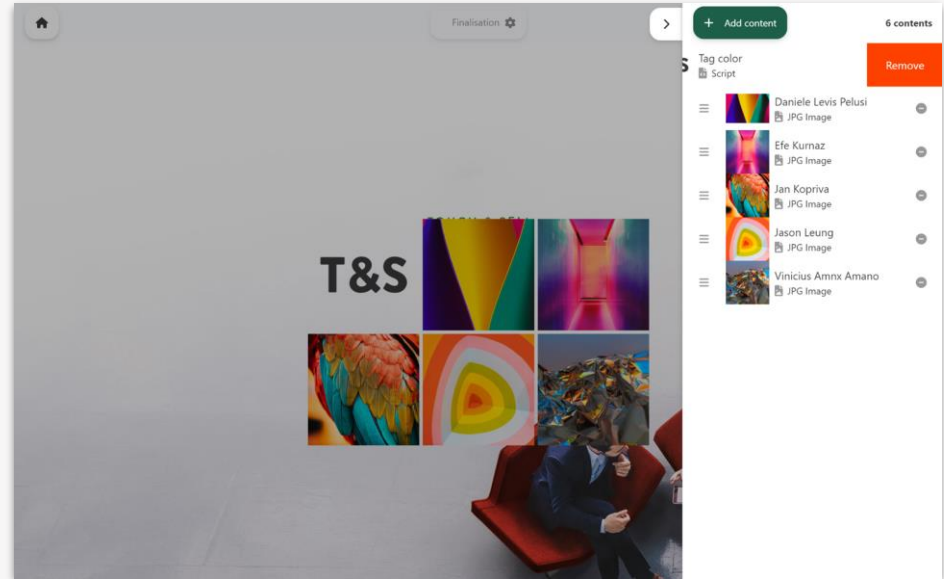
Creating presentations | 3. Adjusting

Your appointment is starting to take shape!

When you press outside the panels or on the cross on the top left, the menu closes.

If you want to add extra content, no need to panic!

You can come back and modify your presentation whenever you wish.





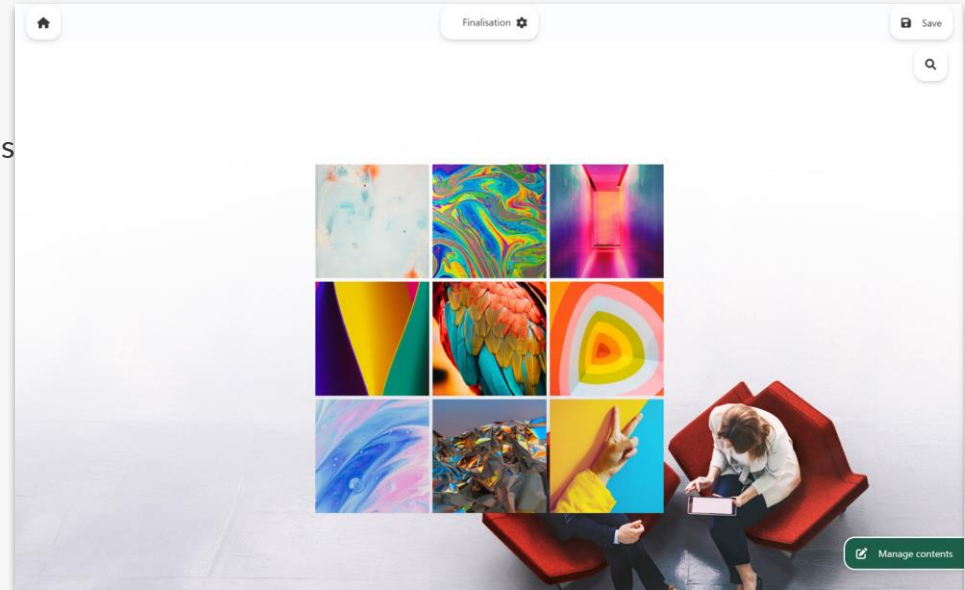
Creating presentations | 4. Browsing & Personalising

When your appointment is ready, all you have left to do is test it out.

You can annotate your PDFs and select pages. Modifications made to your documents will be kept until the day of your scheduled appointment.

It'll still be possible to modify your “prepared” appointment after you’ve recorded it.

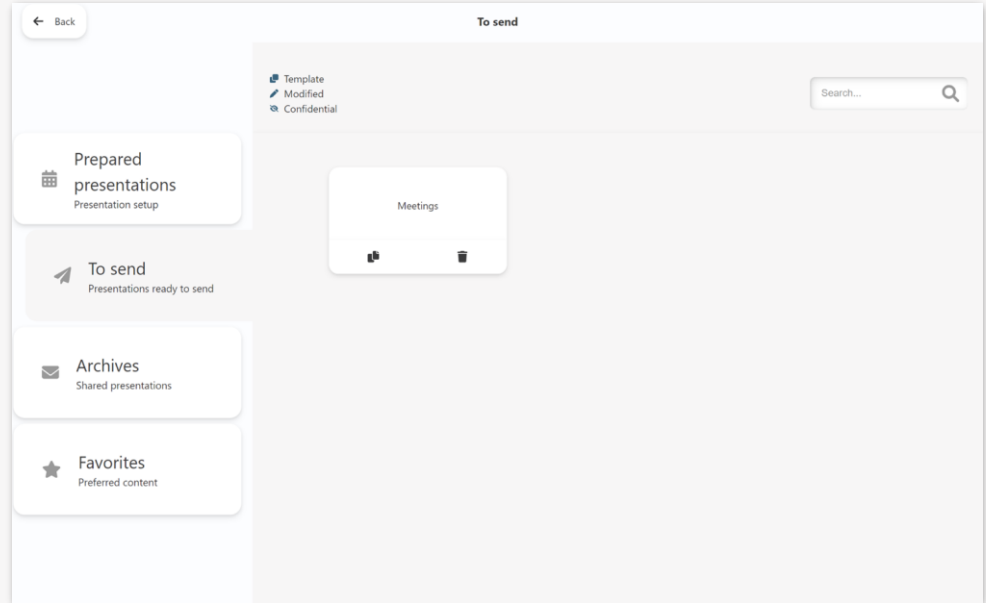
NB: your documents will be updated automatically if your administrator disseminates new versions.





“To Send” Presentation

To send presentation enables you to save a selection of content to share for later communication.





“Archives” Presentation

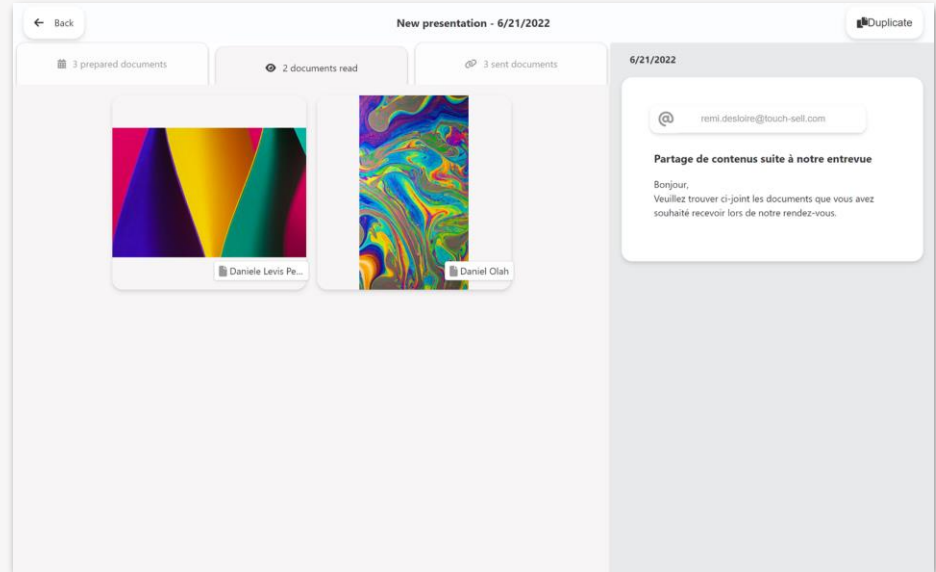
Archives list your previous content sharing operations.

An archive enables you to consult:

- Content presented
- Content shared
- Your recipients' information
- The message relating to the shared content

An archive can be duplicated:

- As a new “prepared” presentation containing prepared content ready to be presented.
- As a new “to send” presentation containing shared content ready to be sent.





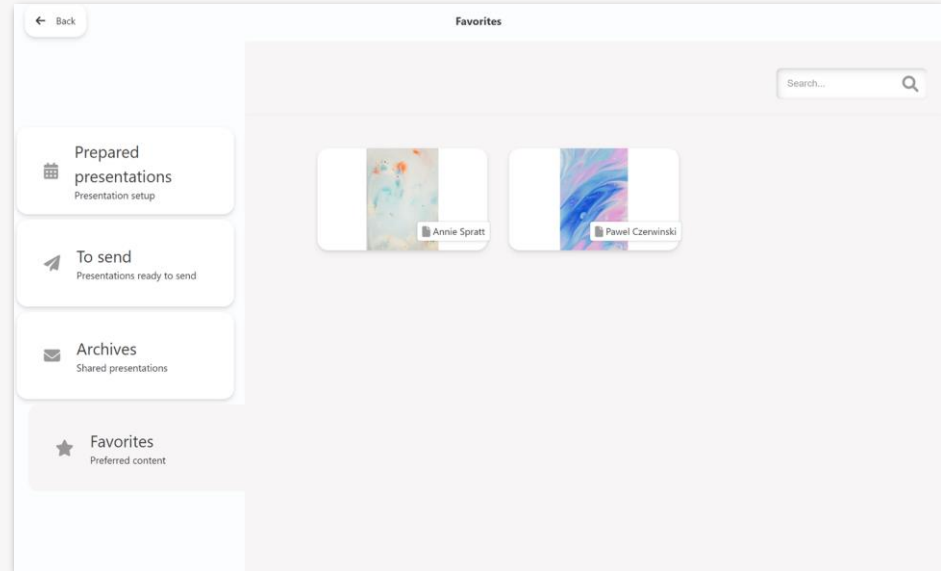
Your favourites

You can add content to favourites.
There are two ways of doing this:

- From the content concerned, click on the star, the icon fills up and the content is added to favourites. The same procedure removes the content from favourites.
- From the tree structure, long click on the content concerned, click on the star, and the content is added to favourites. The same procedure removes the content from favourites.

Favourite content is available from:

- Appointment Options > Favourites: there's no need to go into the presentation in order to consult an item of content.
- Search in the presentation: find favourite content under the search bar for direct access.
- Search in content selection: find favourite content under the search bar.

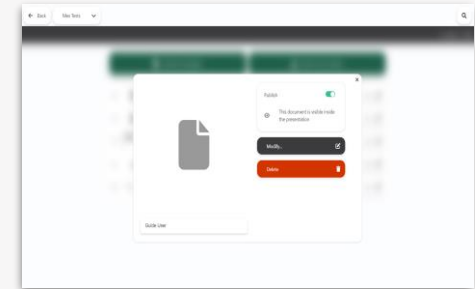
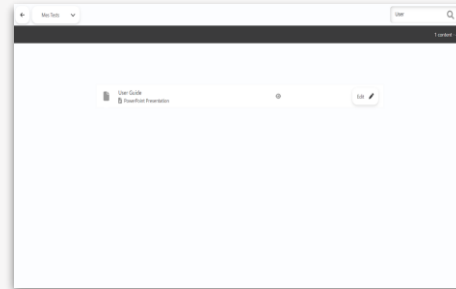
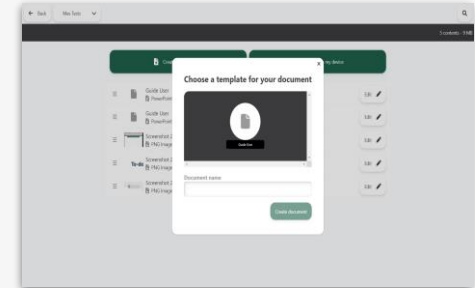
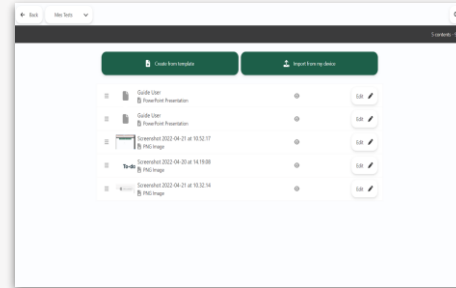




Your User Space

The User Space enables you to :

- Download files from your device.
- Personalise content directly from the application.
- Create new content based on existing templates made available by your administrator (ppt, docx, xlsx, etc.).





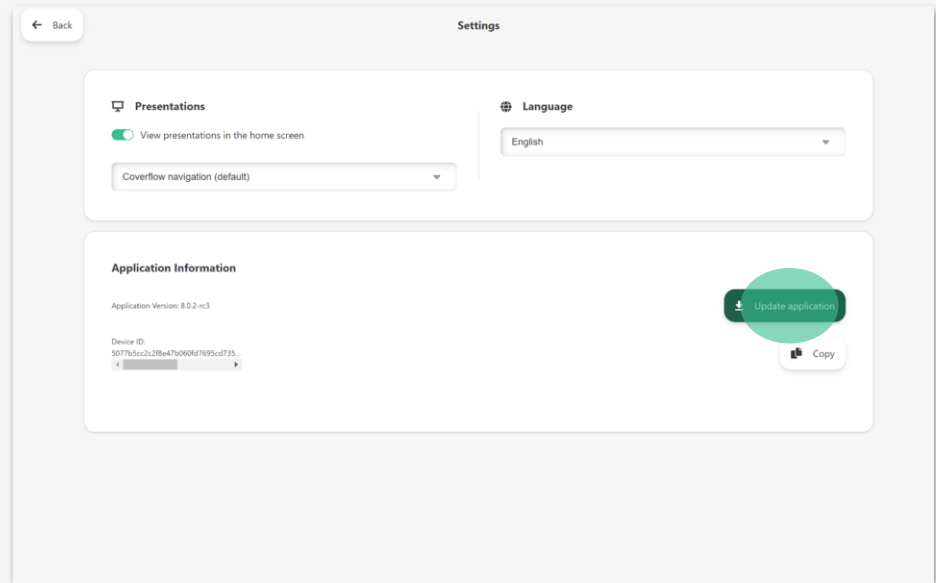
Updating your application

When you update, you benefit from the latest innovations and features, and all the corrections and optimisations made to your application.

To update the application, go to the page communicated by your administrator (e.g. <https://bo.touch-sell.net/XXX/app>).

Two updating methods:

- Minor application update: no action required. The update is carried out during a synchronisation
- Major application update (about every 6 months): you or your CIO must install a new package. No need to re-synchronise all the content!





Your comments and suggestions on
the platform are invaluable.

Write to us: contact@touch-sell.com