Inventory and Help Desk Management Mobile App

Version 2.0 Release Documentation

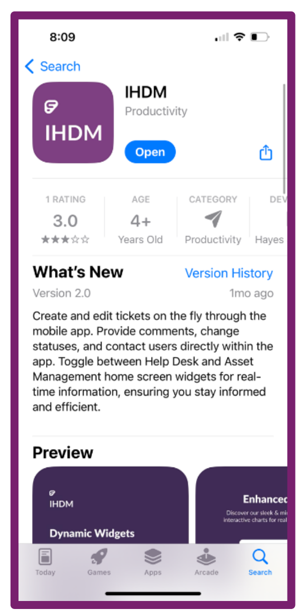
Frontline Education is happy to announce the release of Inventory and Help Desk Management Mobile App. This update includes further integration between Asset Management and Help Desk systems, offering enhanced functionality and a refreshed user experience which includes the following enhancements:

1. **Enhanced UI/UX**
2. **New Dashboard Reporting for Asset Management**
3. **New Dashboard Ticketing for Help Desk**
4. **Ability to Create Help Desk Ticket**
5. **View & Manage Help Desk Tickets**
    a. **Add & View Followers & Service Groups**
    b. **Ability for one Tap call or email from iOS & Android**
    c. **Manage & Add comments, private notes & attachments**

These release notes will walk you through detailed steps for setting up the app, accessing various features, and making the most of the new functionalities. The new app is designed to streamline your asset management and help desk tasks with enhanced usability and integrated functionalities.

Download the New Inventory and Help Desk Mobile App

If you don't already have the IHDM mobile app, follow these setup instructions.



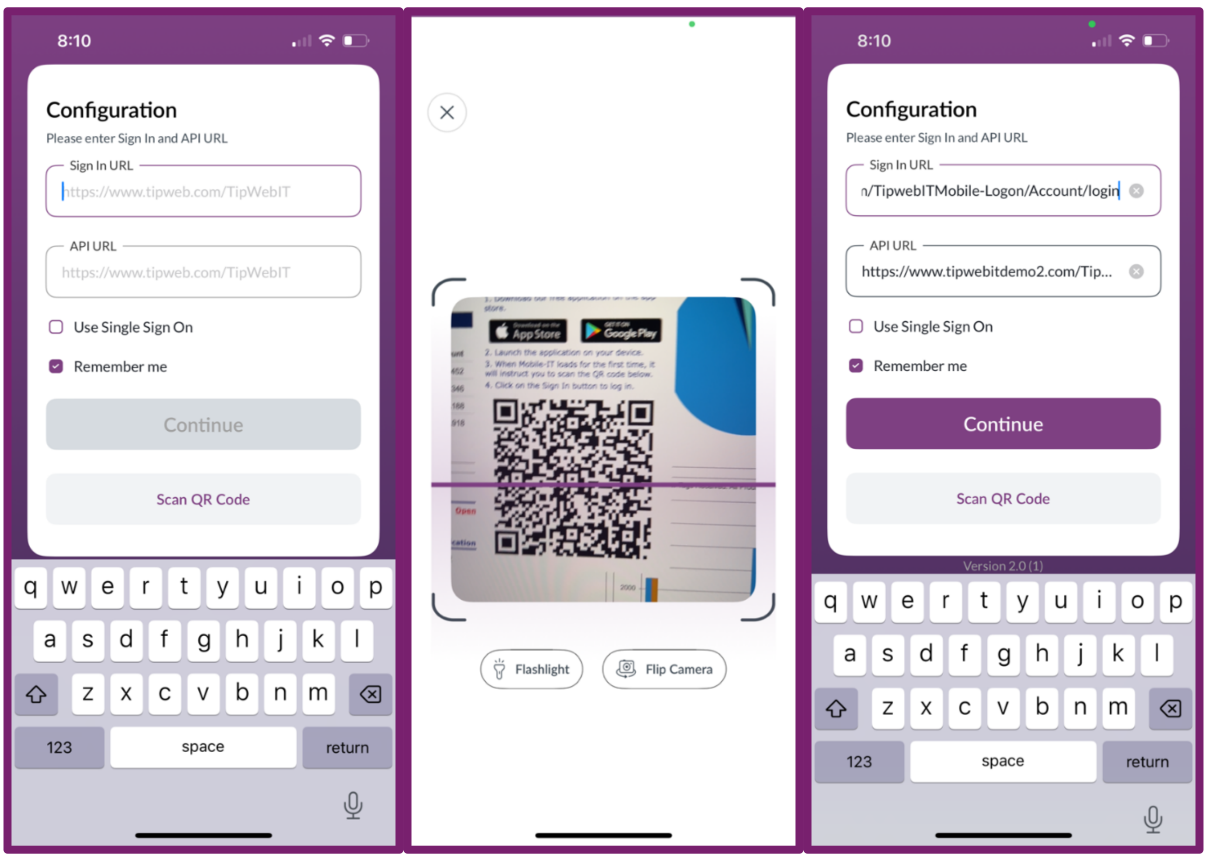
IHDM Mobile App Setup

Step 1: Download the App

- **iOS Users:** Go to the Apple App Store and search for "Inventory and Help Desk Management", "IHDM", or "Hayes Software Systems."
- **Android Users**: Go to the Google Play Store and search for "Inventory and Help Desk Management", "IHDM", or "Hayes Software Systems."
- Download and install the IHDM app on your mobile device.

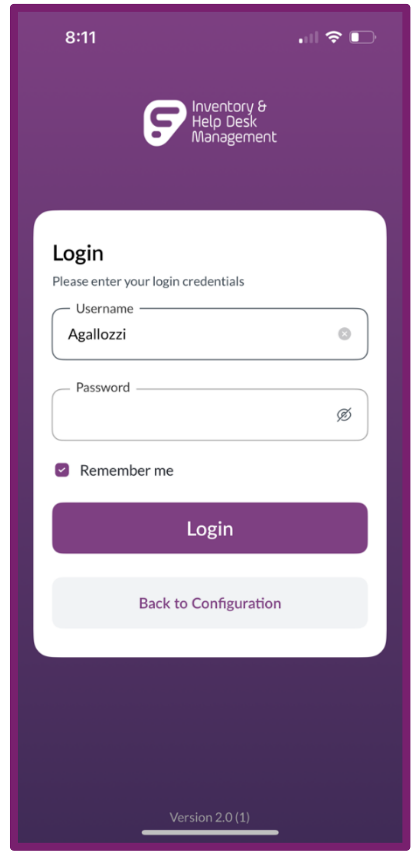
Step 2: Configuration

- Open the IHDM app.
- **Sign In URL**: Enter your district's Frontline Asset Management System URL.
- **API URL**: Enter your district's Frontline Asset Management System API URL.
- **Use Single Sign-On**: Some districts may use Single-Sign On (SSO) so you may be directed to log in through your district's SSO portal. Ensure you enable this during the setup process if this applies to your district.
- **Remember me**: Tap this option to stay signed in to the IHDM mobile app, so you don't have to enter your Sign In URL and API URL each time you open the app.
- **Scan QR Code Option**: Tap the Scan QR Code button at the bottom of the screen and allow camera access to scan the QR code found in your Frontline Asset Management system. When you log into Frontline Asset Management in your web browser, at the bottom of the left side navigation you will see a button that says "Mobile-IT Setup," that button will open the QR code. Scanning this QR Code in the mobile app set up process automatically configures the URL and API URL settings to your database.



Step 3: Login

- **User Name:** Enter your user name provided by your school district.
- **Password:** Enter your password provided by your school district.
- **Remember me:** Tap this option to stay signed in to the IHDM mobile app, so you don't have to enter your User Name and Password each time you open the app.
- **Back to Configuration:** Tap to reconfigure your mobile app to your district's Frontline Asset Management system.
- **NOTES**:
  - All users of the mobile app must have an Asset Management account, as it serves as the source for user information in the app. If a user only has a Help Desk account, they will need to create an Asset Management account using the same email address registered in Help Desk.
  - Upon first login, you may be prompted to allow the app to use your device's camera used for barcode scanning when performing audits, check-in/out, transfers, etc.

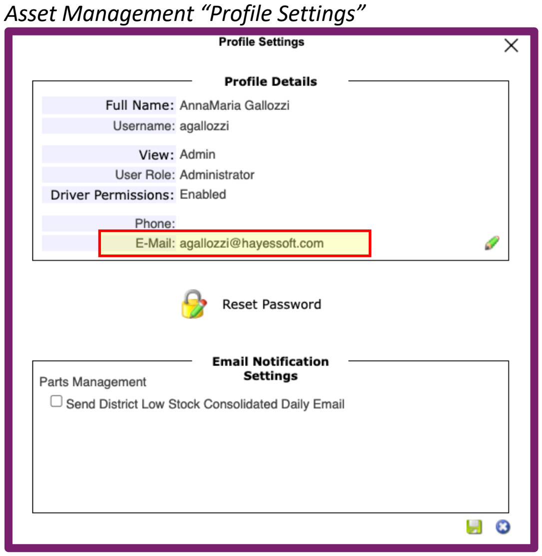


Profile Settings Synchronization

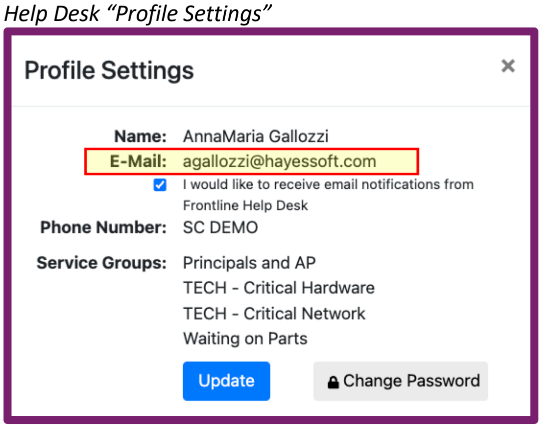
Ensure the email used in your Asset Management user profile matches the one in Help Desk management. This is required for seamless access to both Asset Management and Help Desk fields within the new IHDM mobile app.

- From your web browser, login to Asset Management. Tap your name in the top left corner, and from the dropdown menu, select "Profile Settings." Ensure your email is up to date and matches the email you use for SSO when logging in to Help Desk.

Asset Management "Profile Settings"



Help Desk "Profile Settings"

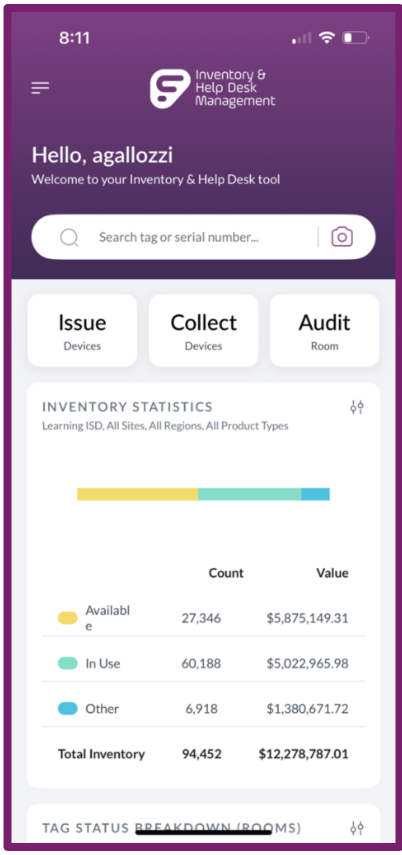


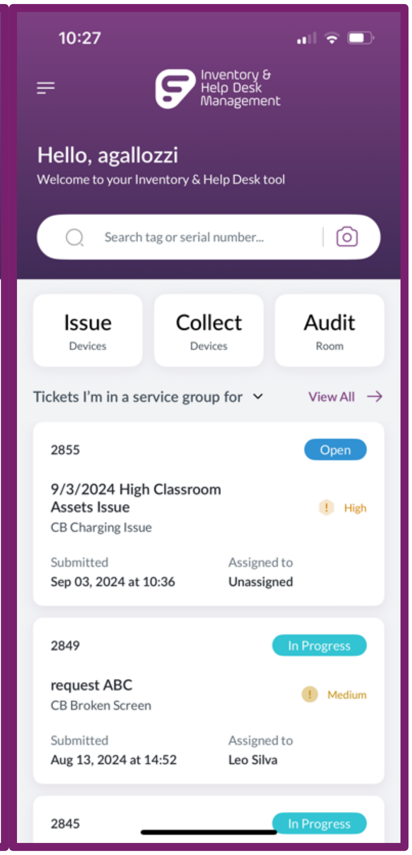
NOTE:

- To verify your Help Desk email from your web browser, login to Help Desk. Tap your name in the top left corner, and from the dropdown menu, select "Profile Settings." Ensure your email is up to date and matches the email you use when logging in to Asset Management.
- Since Help Desk uses SSO, users cannot change their email from Profile Settings in Help Desk. However, in Asset Management, the email can be updated to match the Help Desk email.

Homepage

Upon logging in, you'll land on the app homepage. Help Desk tickets will default if you have access to both Asset Management and Help Desk systems.





Homepage Configuration

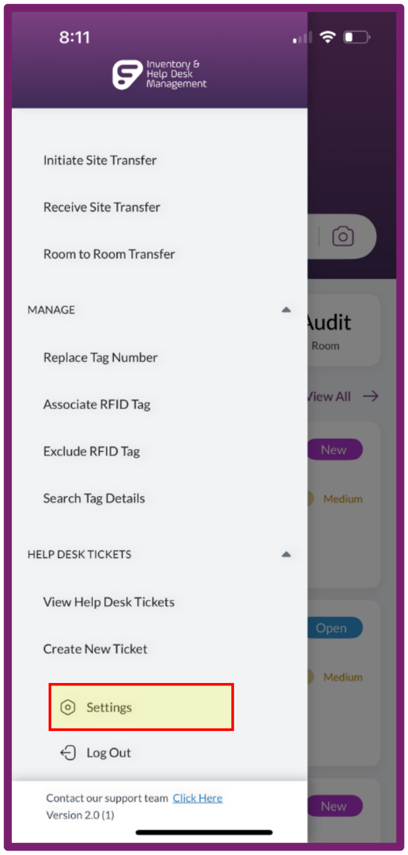
Tailor your mobile app homepage to your role and preferences, making it easier to focus on what matters most to you.

You have two options when changing your homepage default setting, either Asset Management Dashboards or Help Desk Tickets. Help Desk tickets will default if you have access to both Asset Management and Help Desk systems.

Change the Homepage Content Setting

Step 1: Navigate to Settings

- Tap the Hamburger Menu icon on the top left of the app.
- Choose Settings from the menu.

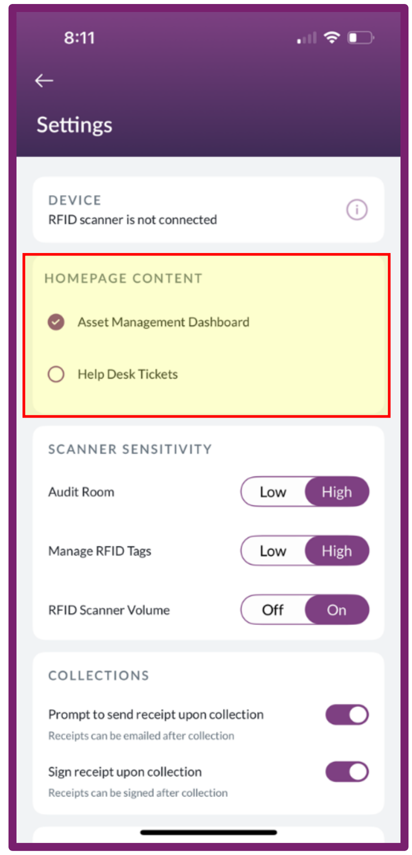


NOTE:

- The hamburger menu provides quick access to different sections like Help Desk, Asset Management, Reports, and Settings.
- You can multitask by switching between sections without losing your place.

Step Two: Modify Homepage Content

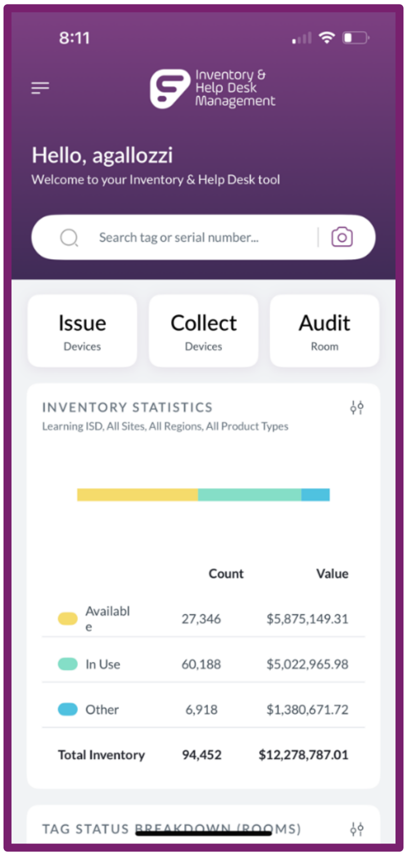
- **Asset Management Dashboard:** Tap the words or the circle to make this your default view.
    - This dashboard view lets you choose from the following charts: Notifications, Outbound Transfers Pending Approval, Staff Status, Purchasing: Outstanding Tags to Receive, Inventory Statistics, Tag Distributions, Tag Status Change Over Time, Tag Status Change Over Time, and User Login.
- **Help Desk Tickets:** Tap the words or the circle to make this your default view.
    - Depending on your role (technician or admin), the "My Tickets" section will display tickets you are assigned to, you submitted, you are following, and you are in a service group for.
- You do not need to Tap Save for the settings to affect.



NOTE: If you do not have Frontline Help Desk, you will not see Help Desk options. If you do not have access to Frontline Help Desk, you will not see the options for Help Desk.

Asset Management Dashboard

With this release, you can tailor your Asset Management Dashboard to display the most relevant data and charts, providing a more personalized experience.

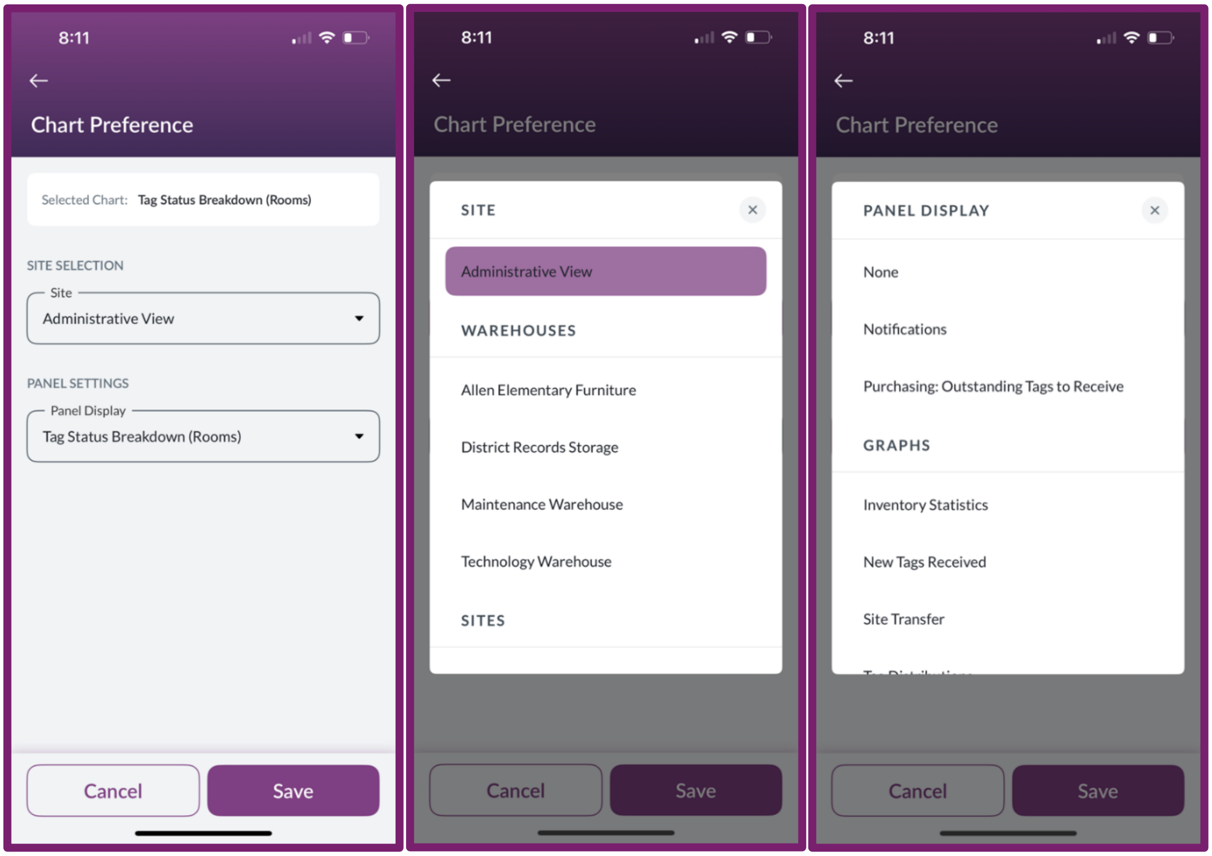


NOTE:

- By default, the dashboard displays two charts on iPhone and Android devices, and three charts on tablet devices. These charts include:
  - Inventory Statistics
  - Outstanding Tags
  - Notifications (tablet default only)

- After customizing your preferences and saving them, your dashboard will automatically update with the latest data based on your selections.

2. **Customize Your Dashboard:**
   - Access the Chart Preference page by Taping the icon in the top right corner of any Chart panel.
   - **Site:** Tailor your Charts to display data for a specific Site by adjusting the Site Selection on the Chart Preference page.
   - **Panel Display:** From here, you can choose Panel Settings, select your preferred Panel Display from the dropdown menu, and Save your preferred chart configurations.



Panel Display Options for your Dashboard

Chart Name	Chart Description	Chart Settings
Notifications	Shows audits, tags, and transfers at this site requiring action by a user.	Site (Admin, Warehouse, or Campus)
New Tags Received	Displays new tags received. Filters include Product Types, Funding Sources, and Date Range. Downloadable .csv file available.	Site (Admin, Warehouse, or Campus) Product Types (check all or just one) Funding Sources (check all, multiples, or just one) Date Range (choose one range for data)
Site Transfer	Displays transfers, as selected by user. Filters include Transfer Type, Origin Site, Destination Site, Funding Source, Product Type, and Date Range. Downloadable .csv file available.	Site (Admin, Warehouse, or Campus) Choose Transfer type (Site to Site or Room to Room) If you choose Site to Site: Origin Regions (check all, multiples, or just one) Origin Sites (check all, multiples, or just one) Destination Regions (check all, multiples, or just one) Destination Sites (pick up to a maximum of 8 sites) Funding Sources (check all, multiples, or just one) Product Types (check all, multiples, or just one) If you choose Room to Room: Sites (pick up to a maximum of 8 sites) Product Types (check all, multiples, or just one)
Purchasing: Outstanding Tags to Receive	Shows quantity of tags to be received on a purchase order (at this site). Filters include Tagging Overdue By and Purchase Date Range.	Site (Admin, Warehouse, or Campus) Enable/Disable: Sort by Recent Purchase Date Tagging Overdue by (time frame) Date Range (choose one range for data)

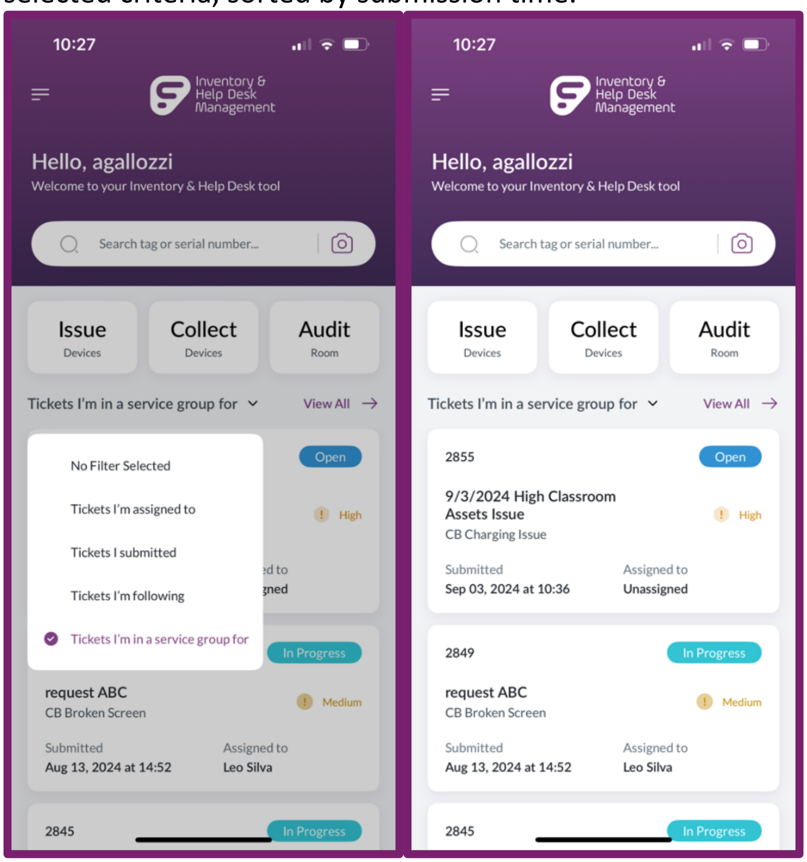
Inventory Statistics	Shows quantity and monetary value of inventory at this site (total, available, and in use). Filters include Product Type.	Site (Admin, Warehouse, or Campus) Regions (setup in Site tab) Sites (can choose all or one) Product Types (Check All or just one)
Tag Distributions	Shows the breakdown of assigned tags by percentage/ quantity for this site.	Site (Admin, Warehouse, or Campus)
Tag Status Change Over Time	Shows the trend of tags, according to selected status, over a period of time for this site. Filters include Status and Date Range.	Site (Admin, Warehouse, or Campus) Status (Choose one status) Date Range (choose one range for data)
Tag Status: Breakdown (Rooms)	Shows status of tags allotted to a room at this site.	Site (Admin, Warehouse, or Campus)
User Login	Shows which users have logged in to Asset Management at this site during an allotted period of time. Filters include User Roles, User Types and Date Range.	Site (Admin, Warehouse, or Campus) Regions (setup in Site tab) Sites (can choose all or one) User Roles (Check All or choose multiples, or one) User Types (Check All or choose multiples, or one) Date Range (choose one range for data)

3. **Refresh Functionality:**
    - Easily refresh the data in the charts displayed on your dashboard by pulling down on the screen, ensuring you always see the most up-to-date data.
4. **Mandatory Information for Charts:**
    - Some charts may require specific mandatory information before they can be generated. This ensures that the data presented is accurate and meaningful.

Help Desk Tickets

Help Desk Tickets enhances functionality, allowing users to more effectively track and manage tickets, with better visibility into ticket status, priority, and other essential details.

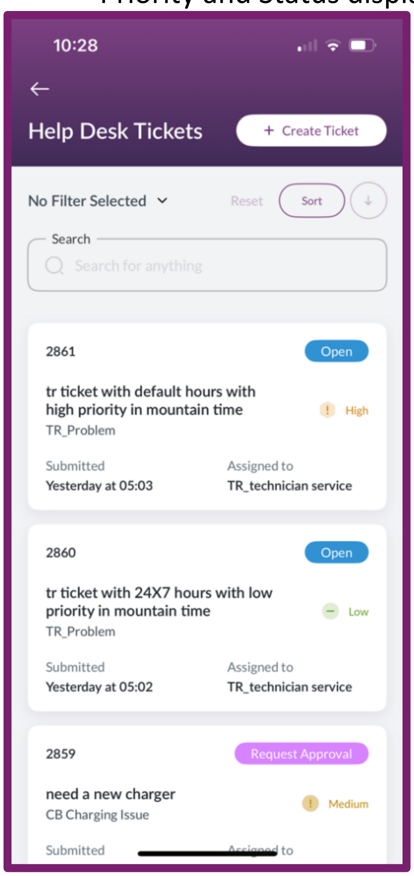
- **Ticket Filters:**
  - By default, No Filter Selected will display all tickets for your role.
  - Taping on No Filter Selected will allow you to choose options available to your role (technician or admin).
  - Filter options could include:
    - **Tickets I'm assigned to**
    - **Tickets I submitted**
    - **Tickets I'm following**
    - **Tickets I'm in a service group for**
  - When a filter is applied, the list will refresh to show tickets that match the selected criteria, sorted by submission time.



- **My Tickets View:**
  - The "My Tickets" section is scrollable, displaying up to four tickets at a time sorted by most recently submitted.
  - If no filter is selected, the page will display all tickets assigned, submitted, following, and are a service group member of.

- Tapping on any ticket will redirect you to the Ticket Details screen, where you can view more information about the selected ticket.

- **View All Option:**
  - Taping "View All" to the right of the filter drop-down, takes you to the Help Desk Tickets page which displays a comprehensive view of tickets.
- **Ticket Information:**
  - Each ticket on the page will display key information, including:
    - **Ticket Number**
    - **Status**
    - **Summary**
    - **Problem Type**
    - **Priority**
    - **Submitted Date and Time**
    - **Assigned To**
  - **Visual Indicators:**
    - Priority and Status display with color codes and icons for quick reference.



- **No Tickets Available Message:**
  - If you have access to view Help Desk tickets but there are none currently available, the app will display the message: "There are no Help Desk tickets available for you at the moment. Please contact support if the problem persists."

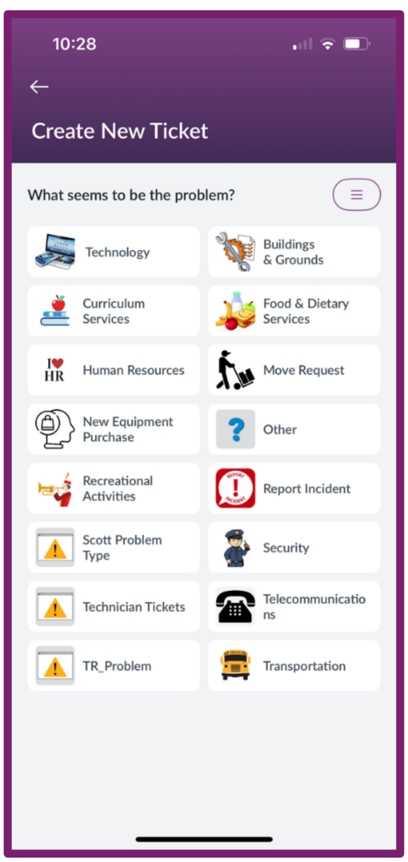
Help Desk Ticket Workflows

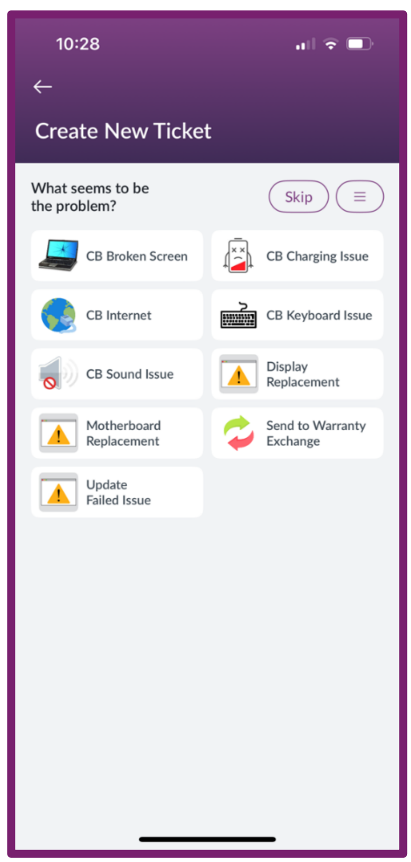
The **Help Desk Ticket Workflows** streamlines the management of ticket statuses, assignments, and communication, ensuring that tickets move efficiently through their lifecycle. By providing clear processes for handling tickets from creation to resolution, this feature enhances team collaboration, improves response times, and helps maintain accountability at every stage.

Create Help Desk Ticket

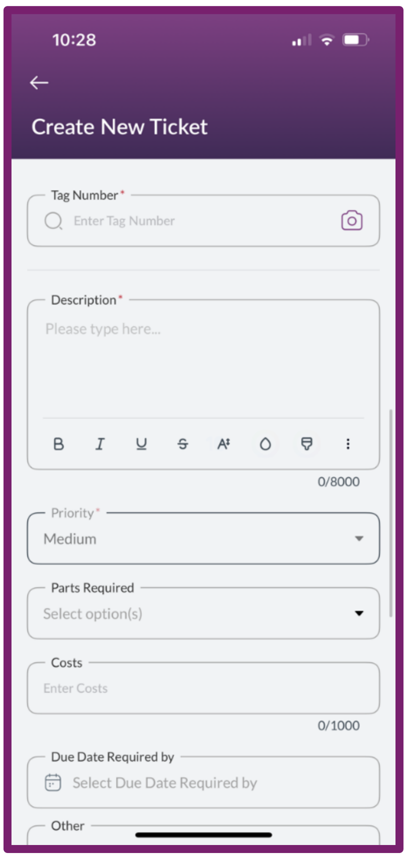
NOTE: Ensure that the user has access to Help Desk. If the user cannot see the "Create New Ticket" button, it indicates that their access is disabled. Similarly, if the user does not have access to view or create any ticket for Help Desk, it indicates that they have no access.

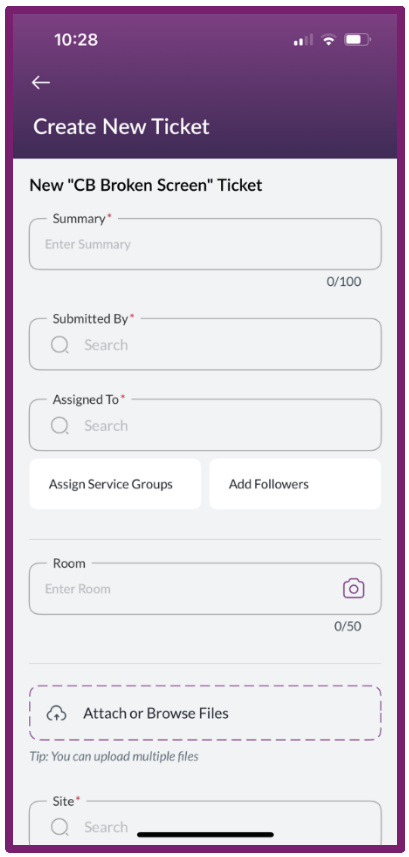
1. **Navigating to Problem Types:**
   - Taping the "Create Ticket" button.
   - On the Create New Ticket page, users are directed select their Problem Type.
   - Available problem types are displayed, with the default view set to Grid layout.
   - Tap the corresponding icon at the top of the page to switch between Grid and List layout.
2. **Creating a Ticket with Sub-Problems**
   - Selecting a problem type that has sub-problems will navigate the user to the Sub-Problem Type screen, where additional options are displayed.
   - Users can either choose a sub-problem type or Tap "Skip" to proceed to the New Ticket form.

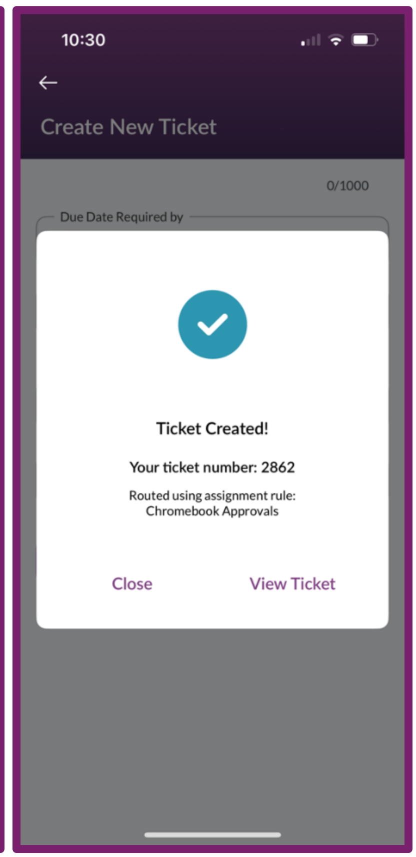




3. **Creating a Ticket Without Sub-Problems:**
    - If a selected problem type does not have sub-problems, the user will be taken directly to the New Ticket form.
4. **New Ticket Form:**
    - The screen will display a header with the title "New [Problem Type name] Ticket," followed by fields such as Summary, Description, Priority, Assigned To, Assign Service Groups, Add Followers, and Submitted By. These fields are populated using your ticket templates that you set up in the web application.
    - The form fields will dynamically adjust based on the selected problem type and subtype.
    - Similar to the main Problem Type screen, the "Create" button will be disabled until all mandatory fields are filled with valid data.



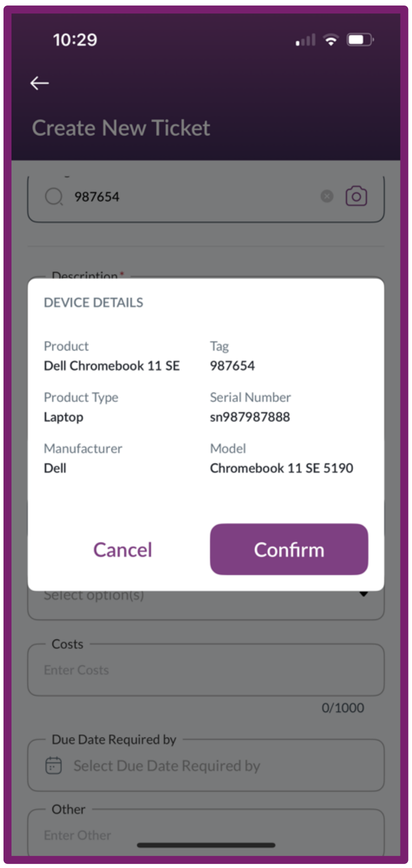




- **Cancel:** Redirects the user back to the Problem Type/Subtype screen.
- **Create:** This button remains disabled until all mandatory fields are completed with valid data. Once enabled, Taping "Create" generates the ticket and redirects the user to the Ticket Details screen.

2. New Ticket Form Field Validations

- **Summary:** Requires a minimum of 10 characters and a maximum of 100 characters.
- **Description:** Requires a minimum of 3 characters and a maximum of 8000 characters.
- **Assigned To:** Selecting "Assign to me" will automatically display the user's name.
- **Assign Service Groups:** Allows selection of up to 5 service groups. Selecting more than 5 will trigger a visual alert with the notes text shaking and turning red.
- **Add Followers:** Allows adding up to 50 users. Exceeding this limit will also trigger a visual alert.
- **Submitted By:** Selecting "Submitted by me" will display the user's name and email.
- **Tag Number Device Details:** After entering a valid Tag number, a Device Details popup will appear for the user to Confirm or Cancel.



3. Attachments and Rich Text Editor

Attach or Browse Files:

- Tap "Attach or Browse Files" to open a popup with options: Camera, File Library, Document, and Cancel.
- **Camera:** Take and upload a photo directly.
- **File Library:** Select and upload a photo from your library.
- **Document:** Choose a file from your documents to upload.
- **Cancel:** Close the popup without uploading.

Attachment Limits:

- Users can add up to 3 attachments per ticket. Supported file types include .jpg, .pdf, .docx, .mp4, and more. A full list is provided in-app.
- Exceeding 3 attachments or 100MB total size will trigger an error message.
- Unsupported file types will display a "File type not allowed" error.

Managing Attachments:

- After uploading, use the "X" icon to remove attachments if needed.

Rich Text Editor:

- The Description field supports rich text formatting, with various options available to enhance the clarity of the description.

  Users can style the text by selecting the respective options shown below:

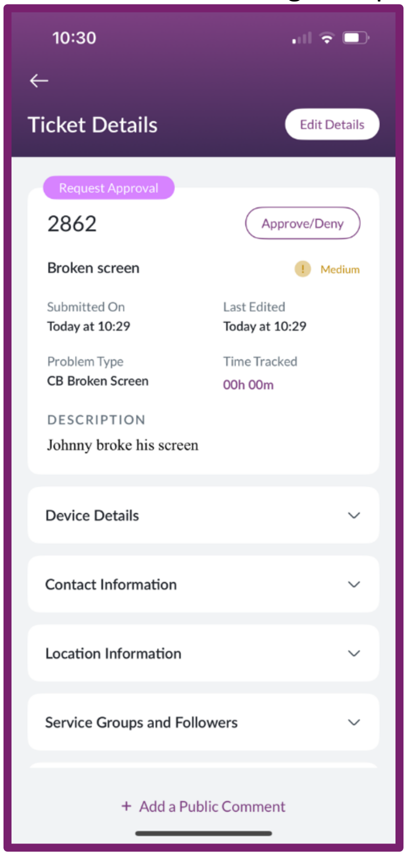
  1. **Bold:** It will apply the text in bold format
  2. **Italic:** It will apply the text in Italic Format.
  3. **Underline:** It will apply the text in underline
  4. **Strike-through:** It will apply the strike to the text.
  5. **Font Size:** It will apply the font size to the text.
  6. **Text color icon:** It will apply the colors to the text.
  7. **Background color:** It will apply the background color to the text.

  Vertical Eclipse icon:

  1. **Left Align:** It will apply the left alignment to the text.
  2. **Center Align:** It will apply the center alignment to the text.
  3. **Right Align:** It will apply the Right alignment to the text.
  4. **Highlight:** Selected Text or Entering text will be highlighted in yellow color.
  5. **Big Red:** The font color will change to red and font size will be increased.
  6. **Small Blue:** The font color will change to small and the font size will be small.
  7. **Clear Formatting:** Selected format will be cleared.

Editing Help Desk Tickets

Editing a Help Desk Ticket allows users to update ticket details, modify problem types, and ensure accurate tracking and resolution of tickets. Below are the workflows for various scenarios when editing a Help Desk ticket.



1. Editing a Ticket with Routing Rule

Admins or technicians can edit a ticket that has routing rules configured based on specific Ticket Detail field changes.

Steps:

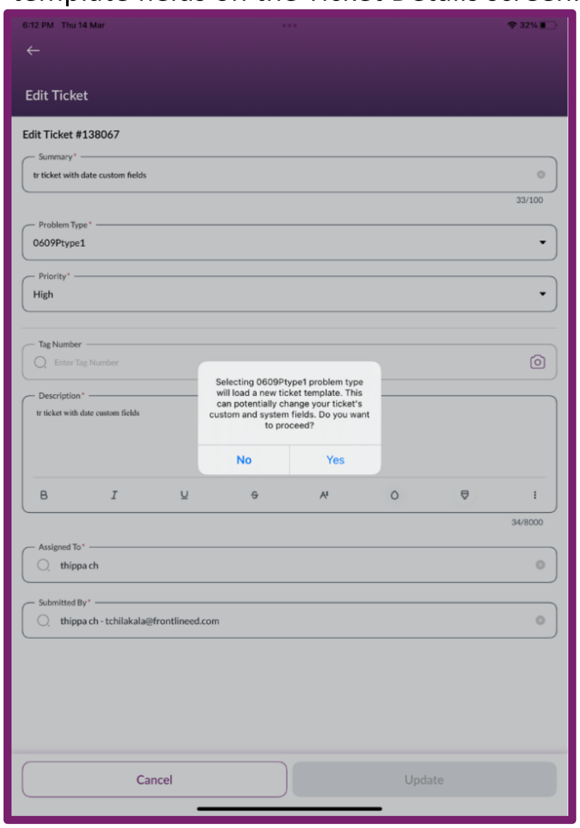
1. Open an existing ticket to view the Ticket Details screen.
2. Tap the "Edit Details" button at the top right corner of the page.
3. Modify the fields (e.g., priority, category) that trigger routing rules.
4. Tap "Update" to save changes.
5. Confirm the routing action if prompted and verify that the ticket is rerouted based on the updated Ticket Details.

2. Changing the Problem Type and Updating the Ticket Template

Changing the Problem Type will load a new ticket template, which may alter previously entered custom and system fields, causing you to lose data.

Steps:

1. Open an existing ticket to view the Ticket Details screen.
2. Tap the "Edit Details" button at the top right corner of the page.
3. Select a different Problem Type from the dropdown menu.
4. A popup will ask if you want to proceed with loading a new template.
5. Tap "Yes" to confirm and load the new template.
6. Review the new template fields and complete necessary information.
7. Tap "Update" to save the changes and verify the updated problem type and template fields on the Ticket Details screen.



3. Canceling Ticket Edits

The user decides not to proceed with editing the ticket.

Steps:

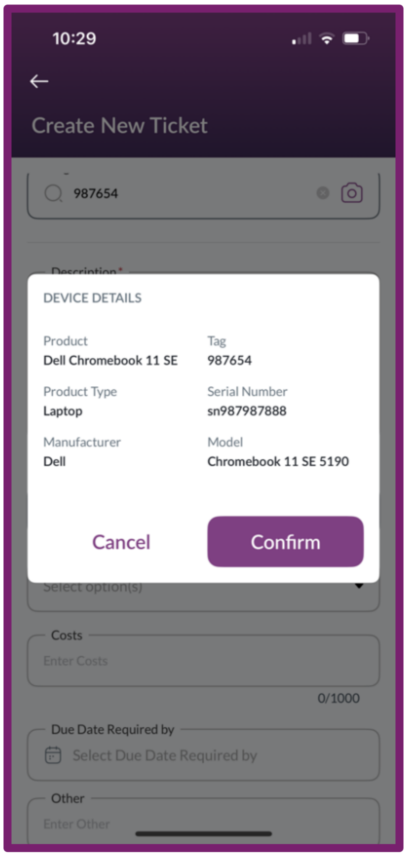
1. Open an existing ticket to view the Ticket Details screen.
2. Tap the "Edit Details" button at the top right corner of the page.
3. Modify some fields as needed.
4. Tap the "Cancel" button to discard changes.
5. Confirm cancellation if prompted, and ensure the ticket remains unchanged.

4. Editing the Tag Number and Confirming Device Details

The ticket contains a tag number field linked to device details.

Steps:

1. Open an existing ticket to view the Ticket Details screen.
2. Tap the "Edit Details" button at the top right corner of the page.
3. Modify or enter the Tag Number.
4. A popup will display device details. Tap "Confirm" to update the tag number with the device name or "Cancel" to discard changes.
5. Tap "Update" to save the changes and verify the tag number reflects the correct device information.



5. Reflecting Edited Changes on the Ticket Detail Screen

The user successfully edits the ticket and needs to verify that changes are accurately displayed.

Steps:

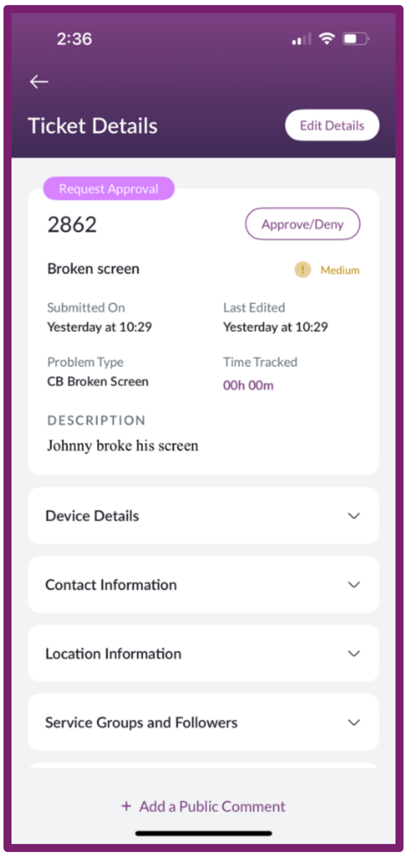
1. Complete the ticket edits by modifying the desired fields.
2. Tap "Update" to save the changes.
3. Return to the Ticket Details screen to ensure all edits are correctly reflected and no information is missing.

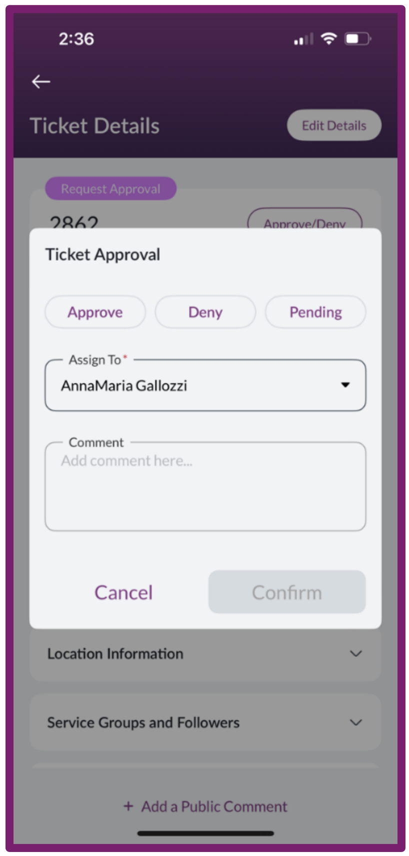
Changing a Ticket Status

When changing a status on a ticket you are working on, you have the option to add a comment to each status change that would add a public comment for the end-user to see.

1. Approve, Pending, or Deny a Ticket

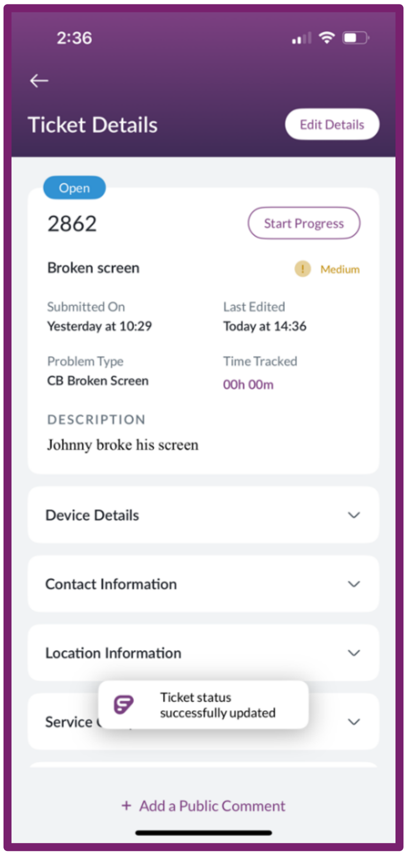
After a ticket has been put in an Approved, Pending, or Denied status, it will route through the "update routing rules" your admin team has created. If you have not created any "update routing rules" the ticket will stay assigned to the current assignee.

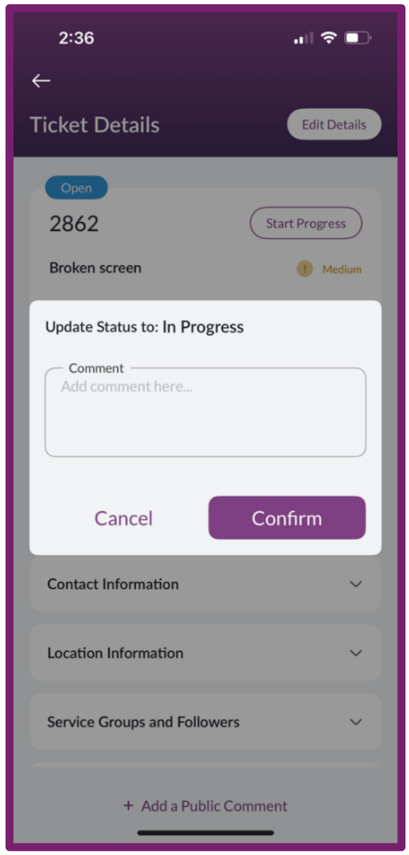




NOTE: Routing rules can be updated in the web application as an admin.

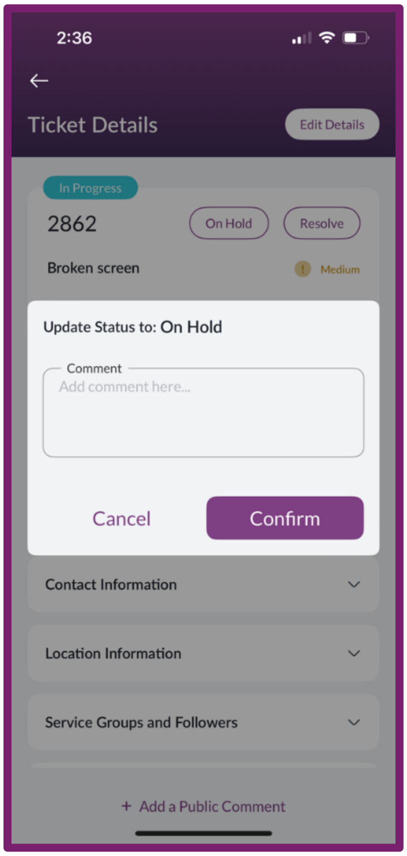
2. Ticket to "Open" and Start Progress
Once a ticket has been set to open, you can start progress on the ticket.





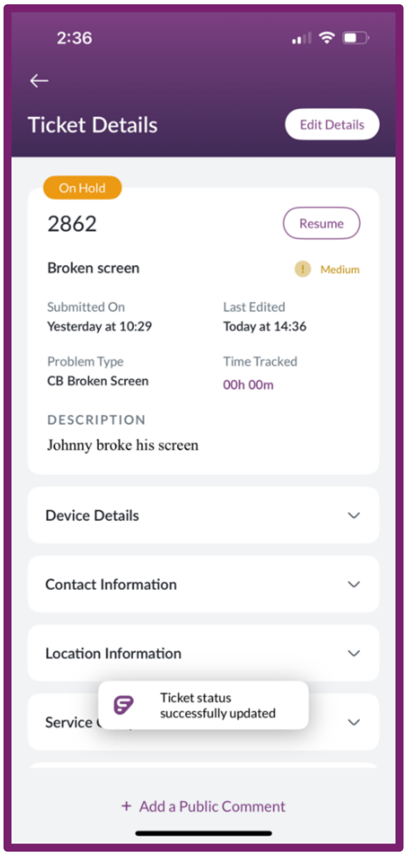
3. Put a Ticket On Hold

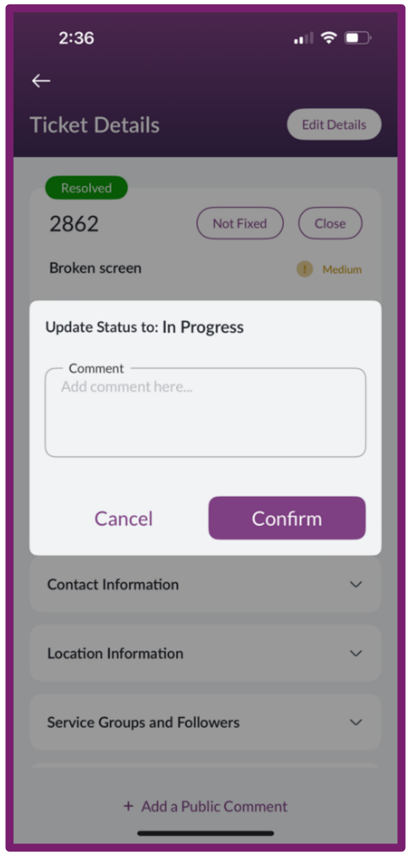
If a ticket needs to be placed "On Hold", you have the option to do so while the ticket is in the status of "In Progress". However, you also have the flexibility to bypass the "On Hold" status and move the ticket directly to "Resolved".



4. Resume a Ticket

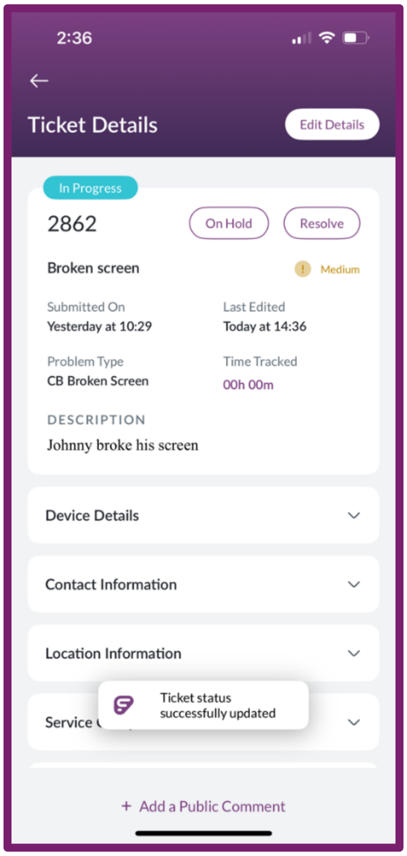
When you're ready to resume work on a ticket that has been marked "On Hold," simply Tap the "Resume" button to move the ticket back to "In Progress."

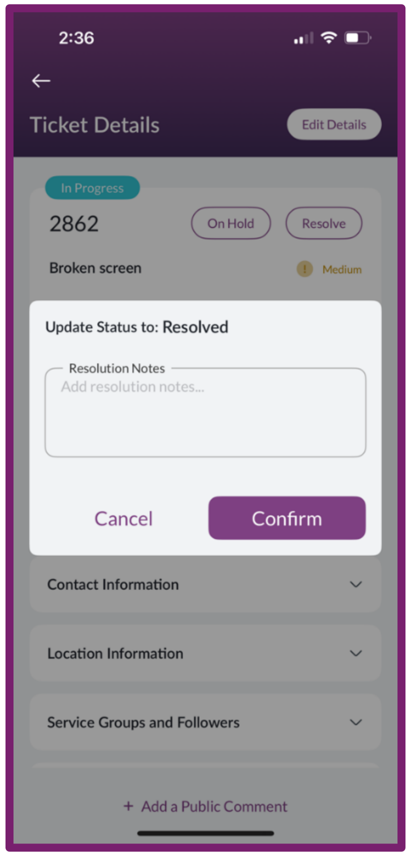




5. Resolve a Ticket

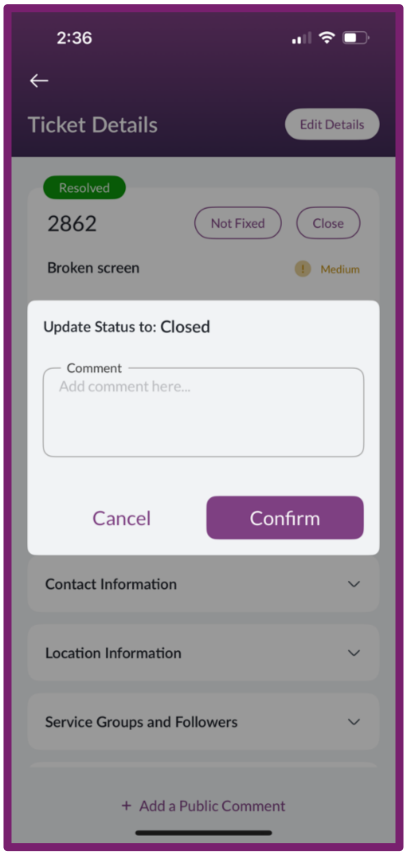
Once a ticket is completed, you can mark it as "Resolved" and add any resolution notes to the public comment section.





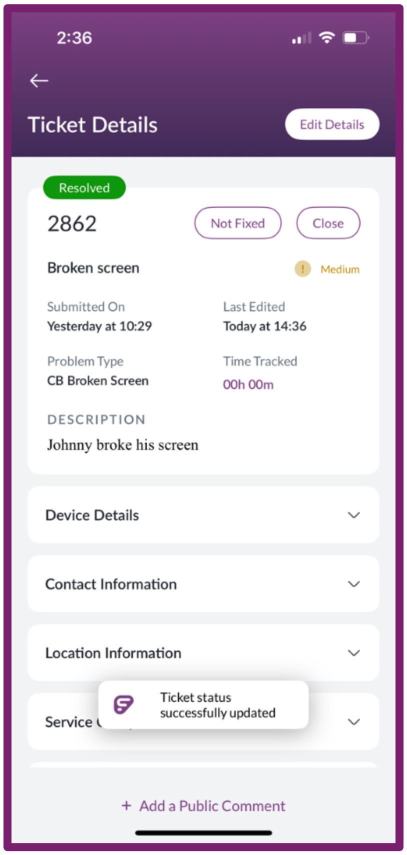
6. Close a Ticket

After a ticket has been resolved, a technician or admin can close the ticket.



7. Reopen a Ticket

After a ticket has been closed or resolved, you can reopen a ticket by Taping “Not Fixed”.



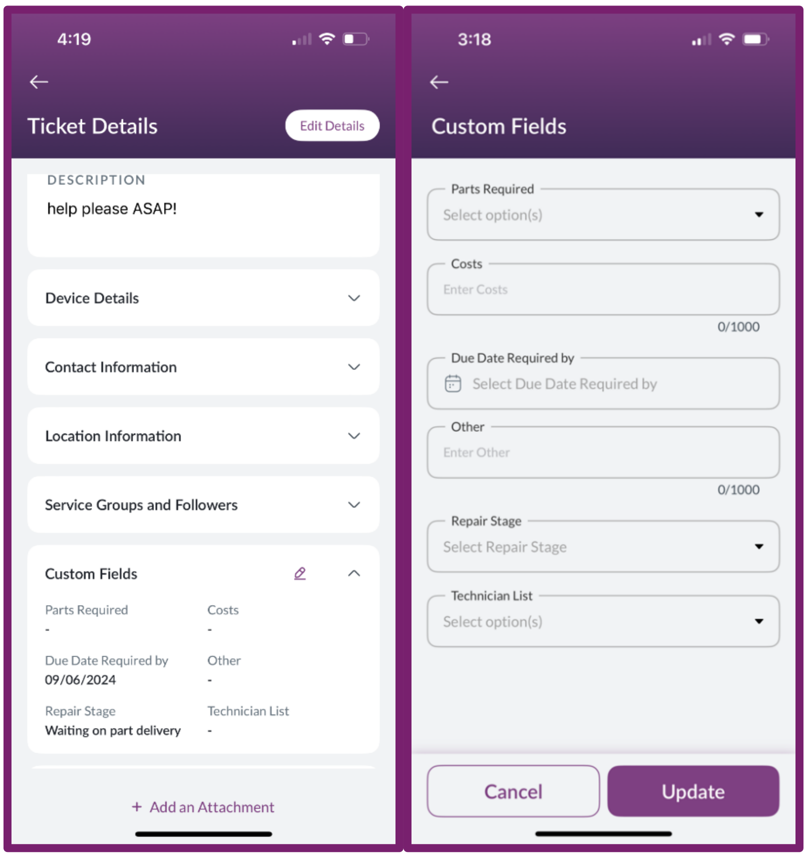
NOTE: Permissions and Restrictions

If a technician's permissions are restricted, they may not be able to change the ticket status or approve tickets. In this case, an admin must grant permission for these actions.

Editing Custom Fields

When a ticket is created, the problem type selected uses a custom ticket template set by the admin in the web application. These templates are predefined and cannot be edited through the mobile app. However, custom fields within the ticket can be modified during editing.

1. Scroll to the **Custom Fields** section.
2. Tap the **edit pencil** icon next to the custom fields to make changes.
3. After editing, Tap **Update** to save your changes.
4. If you Tap **cancel**, no changes will be saved.

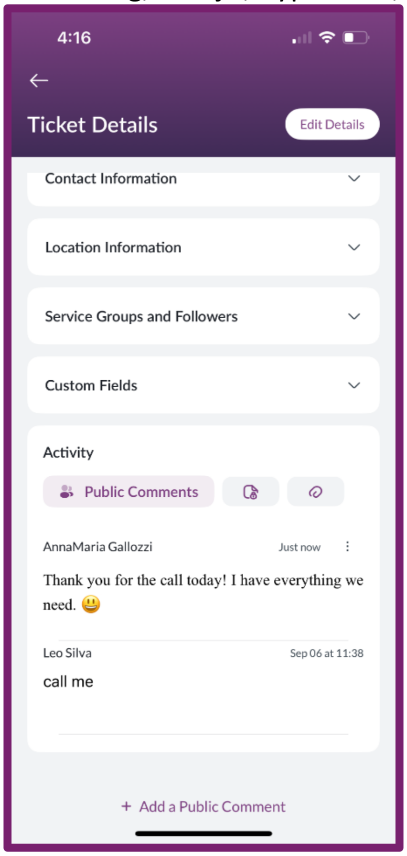


NOTE:

- Editing custom fields may trigger a routing rule, potentially updating the ticket's status or assignment.
- Only the **Custom Fields** section can be edited on the mobile app, while the rest of the ticket template, customized by the admin, remains un-editable.

Public Comments

The **Public Comment** feature allows admins, technicians, and other users to share comments on a ticket that are visible to all users with access to that ticket. These comments are vital for transparent communication and collaboration across teams. Public comments support rich text formatting, emojis, hyperlinks, and media attachments.

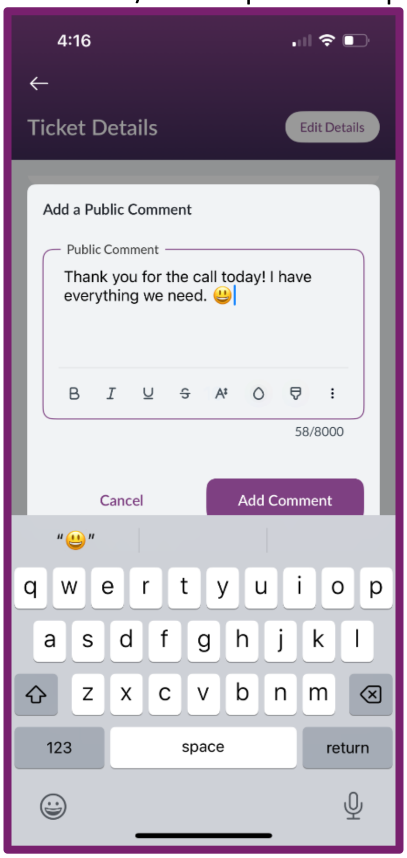


Steps to Submit a Public Comment:

1. Open a ticket to navigate to the **Ticket Details** page.
2. Scroll down to the **Activity** section and Tap on **Public Comments**.
3. Tap Add a Public Comment at the bottom of the page
4. Type your public comment using the rich text editor. Available formatting options include:
    - **Bold**, *Italic*, and **Underline**.
    - **Emojis**: You can add relevant emojis for more expressive comments.
    - **Hyperlinks**: Add links to external resources or related information.
5. Tap **Create** to submit your public comment. The latest public comment will appear at the top of the list, with previous comments below it. The page will continue to scroll and comments will be shown in the mobile app.
6. Each comment will be added to the list in reverse chronological order.

Character Limits:

- **Minimum:** 1 character.
- **Maximum:** 8,000 characters per comment. Longer comments will include a "Show/Hide" option to expand or collapse the text.



Editing Public Comments

The **Edit Public Comment** feature allows users to modify previously submitted public comments. This is useful for correcting information or adding additional context. The feature supports all the same rich text formatting and attachments as the original public comment.

Steps to Edit a Public Comment:

1. In the **Activity** section of a ticket, locate the public comment you wish to edit.
2. Tap the three dots (ellipsis) next to the public comment and select **Edit**.
3. Modify the text in the rich text editor, applying any formatting as needed (bold, italic, underline).
4. Tap **Update** to save the changes. (Updating a public comment will not trigger a notification email or notification in the bell icon)
5. If you Tap **Cancel**, your changes will be discarded, and the original public comment remains unchanged.
6. The edited public comment will be updated in the public comment list with the new content.

Deleting Public Comments

Admins and technicians can delete their public comments if they are no longer relevant or were posted in error. Deleting a comment does not unsend the email notification of that comment.

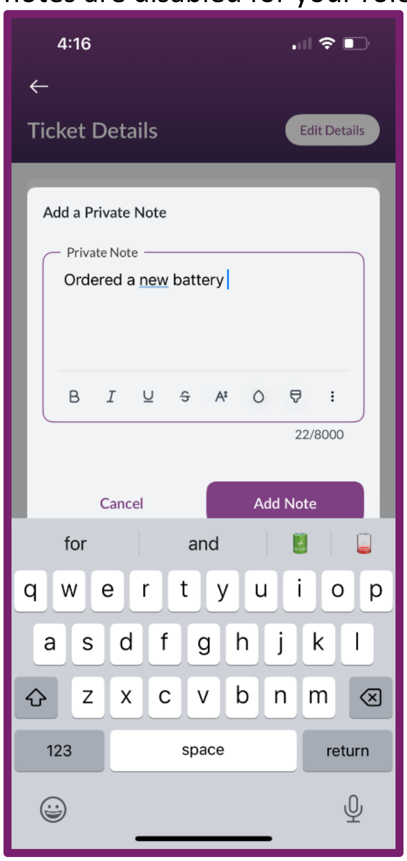
Steps to Delete a Public Comment:

1. In the **Activity** section of a ticket, locate the comment you wish to delete.
2. Tap the three dots (ellipsis) next to the comment and select **Delete**.
3. Confirm the deletion. The comment will be permanently removed from the list and will no longer appear in the ticket's activity.

Private Notes

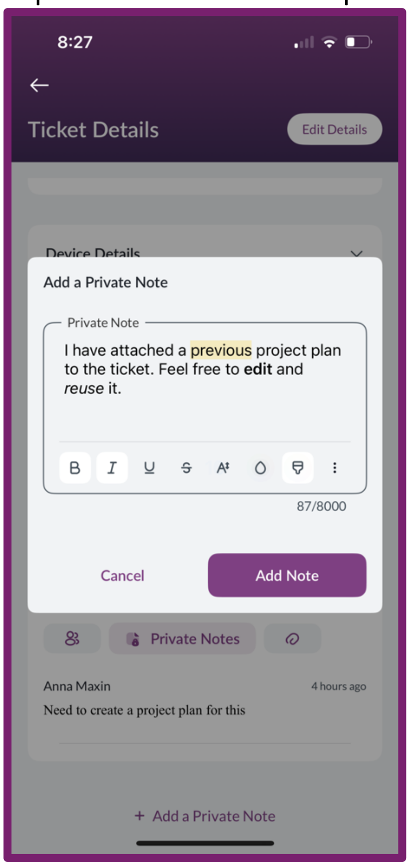
The **Private Notes** feature allows admins and technicians to document internal notes that are only visible to authorized users. These notes are not shown to end users or external viewers, making them ideal for internal discussions or tracking information.

NOTE: Private notes are hidden from users who do not have permission to view them. If private notes are disabled for your role, this section will not be visible.



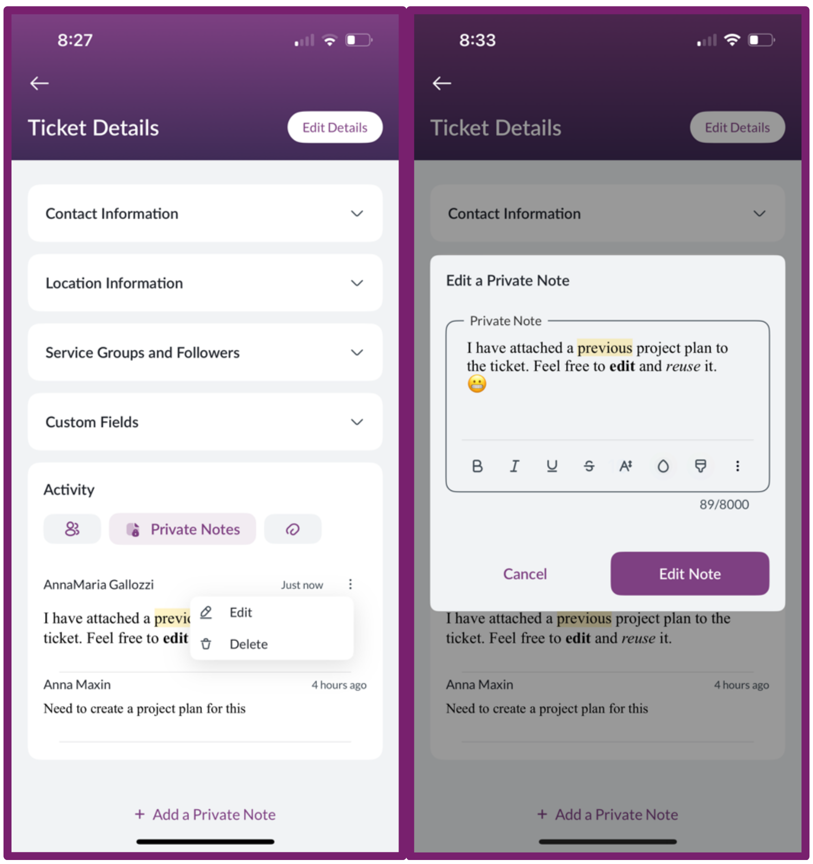
Steps to Add a Private Note:

1. Open a ticket to navigate to the **Ticket Details** page.
2. Scroll down to the **Activity** section and Tap on **Private Notes icon**.
3. Tap **Add a Private Note** at the bottom of the page.
4. Enter your note and apply formatting such as bold, italic, or underline. You can also:
    - Add **attachments** such as images, documents, or media.
    - Insert **hyperlinks** to other resources.
    - Include **emojis** for clarity or emphasis.
5. Tap **Add Note** to save the private note, or **Cancel** to discard it.



Steps to Edit a Private Note:

1. In the **Activity** section of a ticket, locate the Private Note you wish to edit.
2. Tap the three dots (ellipsis) next to the public comment and select **Edit**.
3. Modify the text in the rich text editor, applying any formatting as needed (bold, italic, underline).
4. Tap **Update** to save the changes. (Private notes do not trigger email notifications that include the message, editing a private note will not trigger an email notification at all.)
5. If you Tap **Cancel**, your changes will be discarded, and the original private note remains unchanged.
6. The edited public comment will be updated in the private note list with the new content.



Deleting Private notes

Admins and technicians can delete their private notes if they are no longer relevant or were posted in error. Deleting a comment does not unsend the email notification of that comment.

Steps to Delete a Private Note:

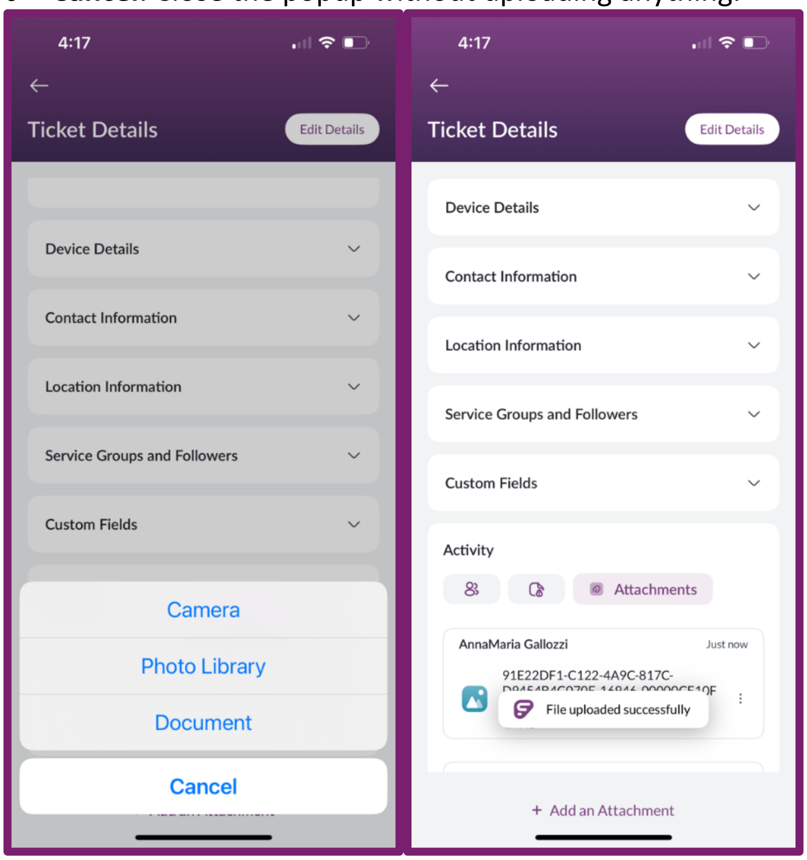
4. In the **Activity** section of a ticket, locate the comment you wish to delete.
5. Tap the three dots (ellipsis) next to the comment and select **Delete**.
6. Confirm the deletion. The comment will be permanently removed from the list and will no longer appear in the ticket's activity.

Attachments

Attachments are a crucial part of ticket management, allowing users to upload files that provide additional context or documentation. Users can add up to 3 attachments per ticket when creating a new ticket or up 100MB on existing tickets with a variety of supported file types.

Steps to Add Attachments:

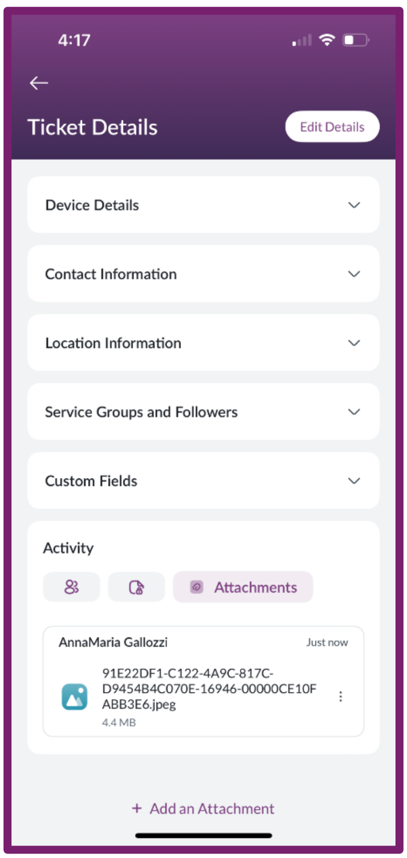
1. When creating or editing a ticket, tap the **Add an Attachment** or **Browse Files** button.
2. A popup will appear with the following options:
    - **Camera**: Take a new photo and upload it.
    - **File Library**: Select a file from your device's photo library.
    - **Document**: Upload a document from your device (e.g., PDFs, Word documents).
    - **Cancel**: Close the popup without uploading anything.

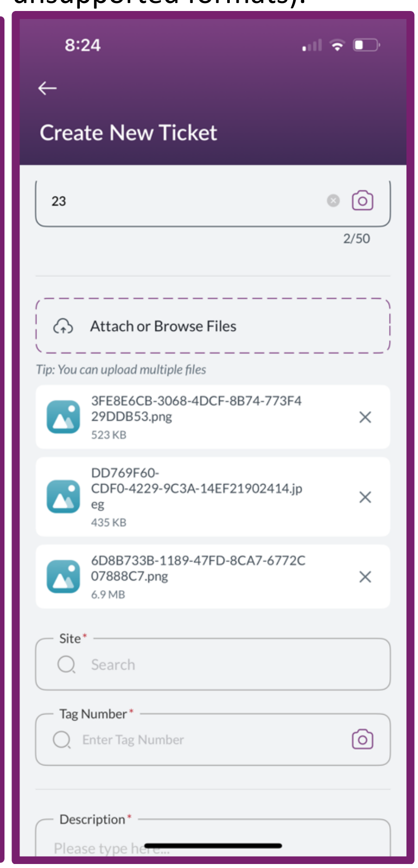


3. Once the file is uploaded, a loading indicator will appear. After the file is uploaded, when creating a new ticket, you'll see an "x" icon next to the attachment, allowing you to remove it if needed. When you are editing an existing ticket, there will be a vertical ellipses with the options to download or delete the attachment.

File Type Limits:

- You can upload a maximum of 3 files per ticket when creating a new ticket
- If you are adding attachments to an existing ticket you can have up to 100MB per ticket.
- Supported file extensions include:
    - **Images**: .jpg, .jpeg, .png, .gif, .bmp
    - **Documents**: .doc, .docx, .pdf, .txt, .csv, .xlsx, .ppt, .pptx, .rtf
    - **Videos**: .mp4, .avi, .mov, .wmv, .flv
    - **Audio**: .mp3, .wav
    - **Emails**: .eml, .msg
    - **Archives**: .zip
- **File Size Limit**: Each ticket can contain up to 100MB of attachments.
- If you attempt to upload more than 3 files or exceed the size limit, the system will display an error message:
    - “Maximum 3 files are allowed.” (these error is only when creating a new ticket)
    - “Maximum of 100MB of files is allowed for each ticket.”
    - "File type not allowed" (for unsupported formats).



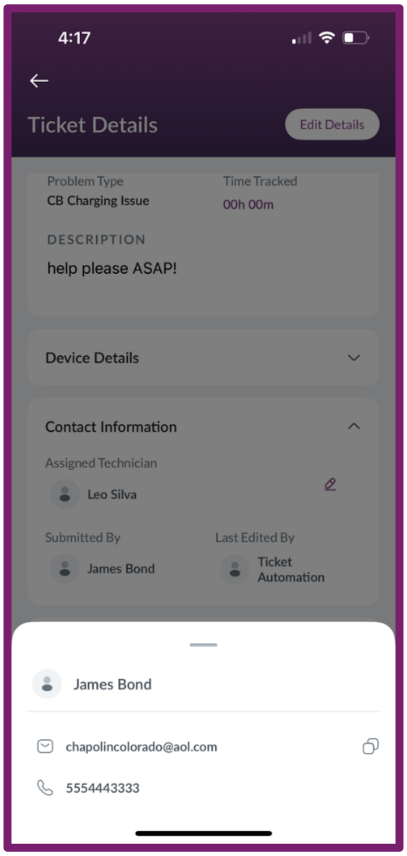


Removing Attachments:

- To remove an attachment, Tap the "x" icon next to the file. The attachment will be deleted from the ticket.

Contact and Location Information

The **Contact Information** and **Location Information** sections in a Help Desk Ticket Details allow users to easily communicate with team members via email or phone and view/edit location-related data. This feature enhances direct communication and keeps essential contact details accessible.



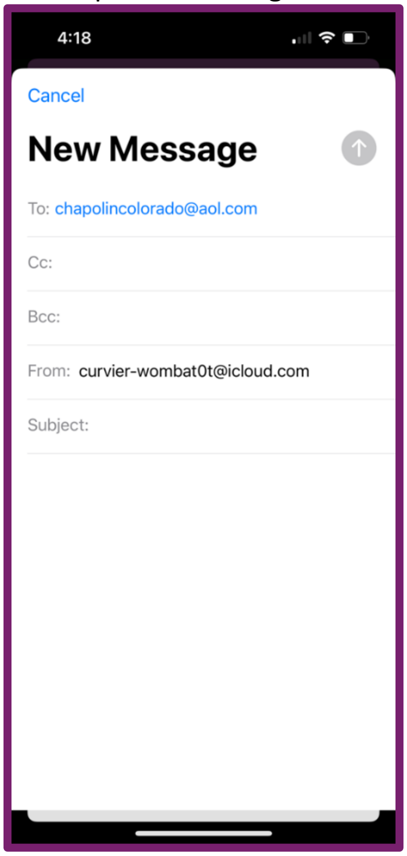
Viewing Contact Information and Initiating Actions

1. Open a ticket to navigate to the **Ticket Details** page.
2. Scroll down to the **Contact Information** section, observe the details displayed:
    - **Assigned Technician**
    - **Submitted By**
    - **Last Edited By**
3. Tap on any name to initiate an action. A pop-up will display options:
    - **Email**: Tap to open your email client with the recipient's email address pre-filled.
    - **Copy Email**: Tap the Copy icon and the email address is copied to your clipboard.
    - **Phone** (if available): Tap to initiate a call directly to the provided phone number.

NOTE: By emailing outside of public comments or making a phone call, these actions will not be tracked in the ticket.

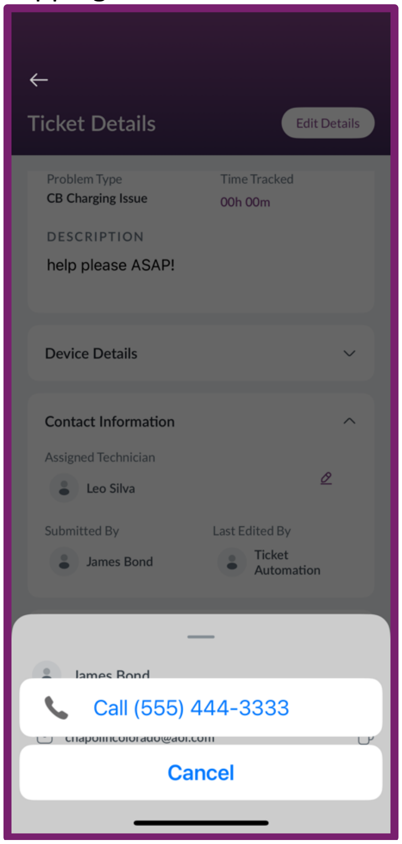
Initiating an Email

1. Tap the email address of the **Assigned Technician**, **Submitted By**, or **Last Edited By**.
2. Your default email client will open, with the recipient's address pre-filled, ready for you to compose a message.



Initiating a Phone Call

1. Tap the phone number associated with the **Assigned Technician**, **Submitted By**, or **Last Edited By**.
2. Tapping the number will initiate a direct phone call (Not applicable for iPad users).



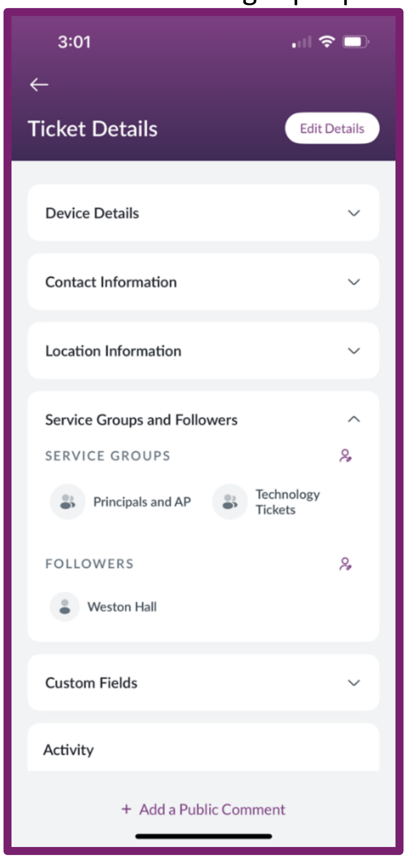
Contact Information Without a Phone Number

1. Tap on the **Contact Information** section.
2. Observe that no phone number field is displayed if a number is not available for the contact.

Service Groups and Followers

Leveraging **Service Groups and Followers** streamlines communication and enhances collaboration. **Service Groups** allow tasks to be assigned to specific teams, ensuring efficient task management and clear ownership. **Followers** can stay informed on ticket progress without being assigned tasks, maintaining visibility into the workflow.

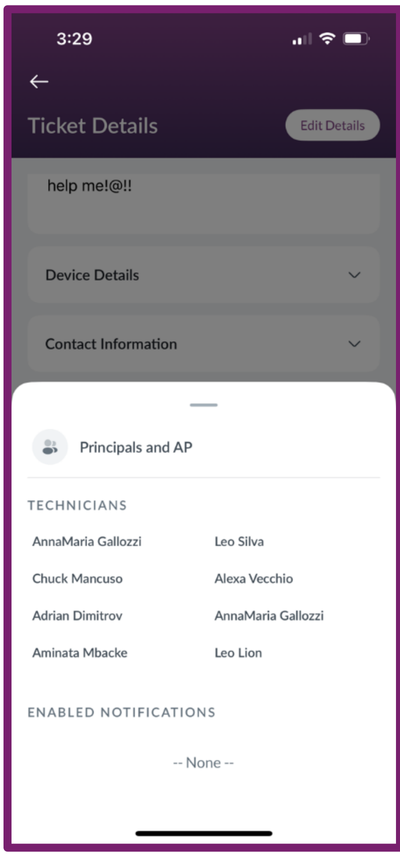
For seamless communication, users can easily interact with **Followers** by tapping on their name to quickly email, copy their email address, or call them if a phone number is available. This ensures that the right people stay connected and up-to-date throughout the ticket's lifecycle.

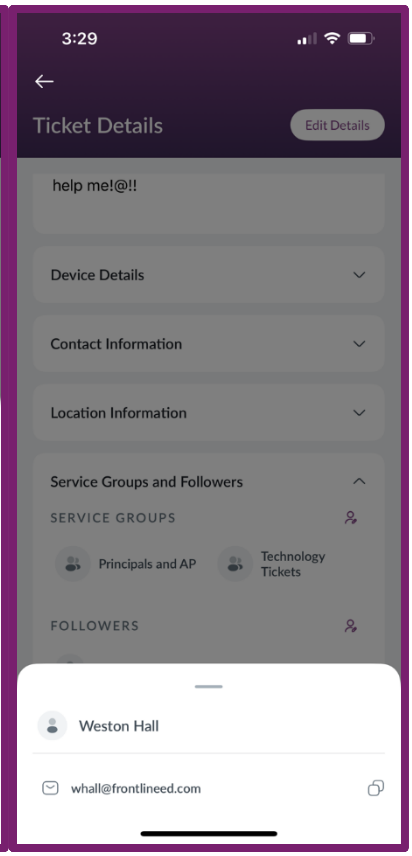


Viewing Service Groups and Followers:

1. Open a ticket to navigate to the **Ticket Details** page.
2. Scroll down to the **Service Groups and Followers** section.
3. Tap on the **Service Groups** section to view the list of people in the service group
4. Tap the **Followers** names to view their contact information.
5. Tap on any **Followers**' name to initiate an action. A pop-up will display options:
    - **Email**: Tap to open your email client with the recipient's email address pre-filled.
    - **Copy Email**: Tap the Copy icon and the email address is copied to your clipboard.
    - **Phone** (if available): Tap to initiate a call directly to the provided phone number.

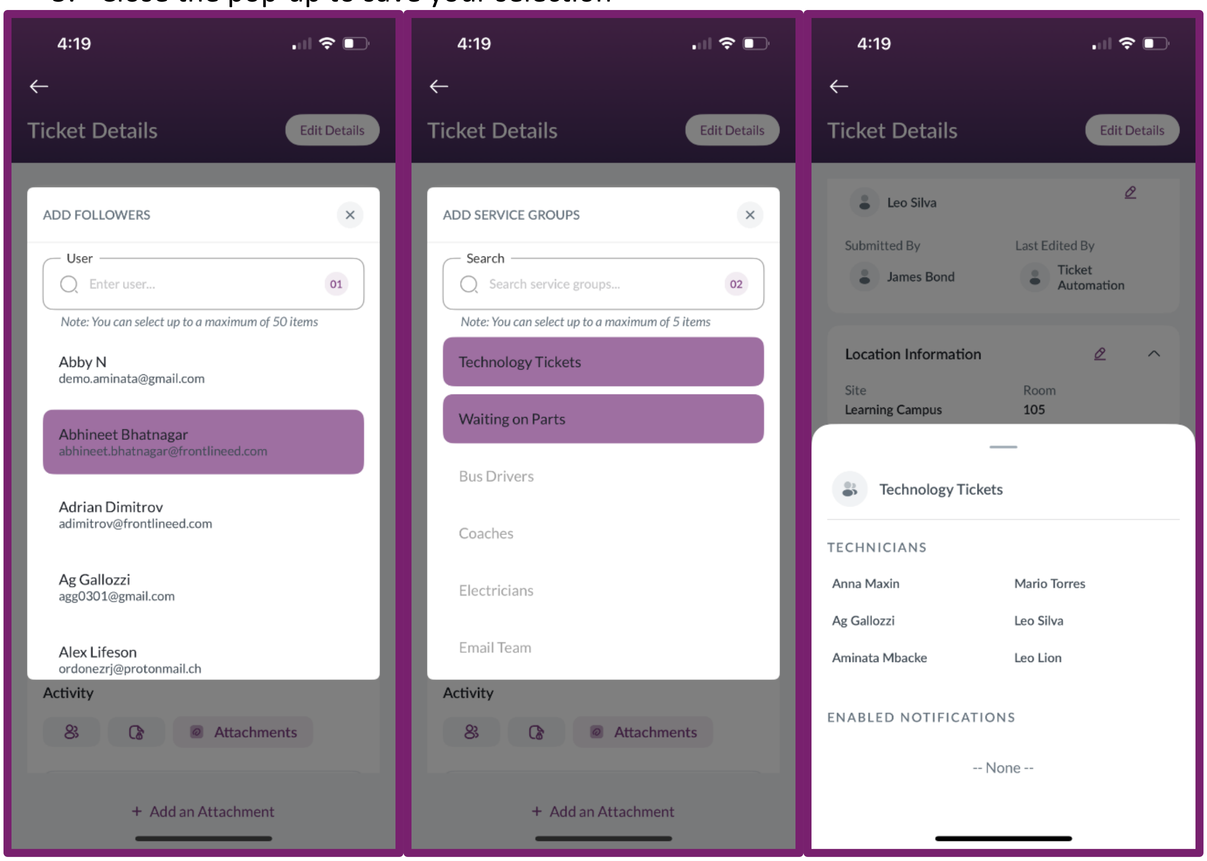
NOTE: By emailing outside of public comments or making a phone call, these actions will not be tracked in the ticket.





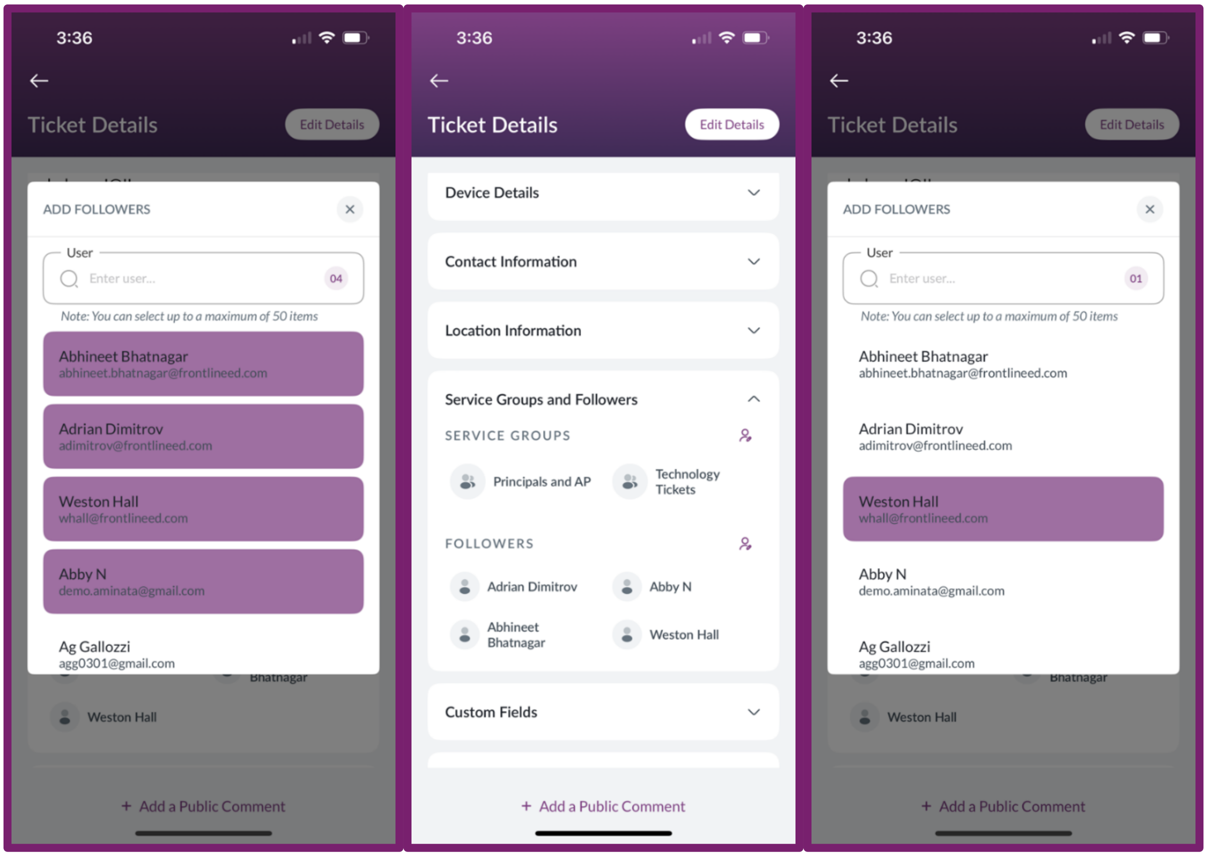
Steps to Add Service Groups:

1. Open a ticket to navigate to the **Ticket Details** page.
2. Scroll down to the **Service Groups and Followers** section.
3. Tap the Assign Service Groups icon (person with edit pencil)
4. Select up to 5 Service Groups from the available options.
    - If more than 5 service groups are selected, an alert will appear, and the excess groups will be deselected.
5. Close the pop-up to save your selection



Steps to Add Followers:

1. Tap the Add Followers button (person with edit pencil)
2. Select up to 50 followers from the list of available users.
   - If more than 50 followers are selected, an alert will appear, and the additional users will be deselected.
3. Close the pop-up to save your selection

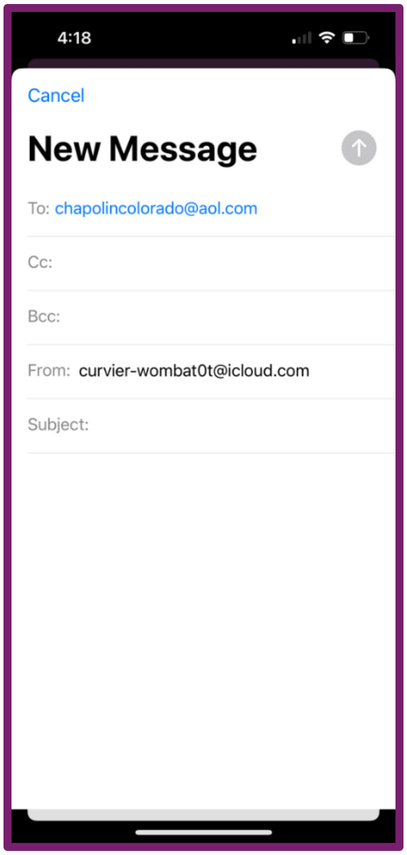


Contacting Followers:

The **Service Groups and Followers** section in a Help Desk Ticket Details allows users to easily communicate with **Followers** via email or phone. This feature enhances direct communication and keeps essential contact details accessible.

Initiating an Email

3. Tap the email address of the **Followers**
4. Your default email client will open, with the recipient's address pre-filled, ready for you to compose a message.


4:18
Cancel
New Message
To: chapolincolorado@aol.com
Cc:
Bcc:
From: curvier-wombat0t@icloud.com
Subject:

Initiating a Phone Call

3. Tap the phone number associated with **Followers**.
4. Tapping the number will initiate a direct phone call (Not applicable for iPad users).