LathranSuite Mobile Application

Step – by – Step Guide

2024

LathranSoft

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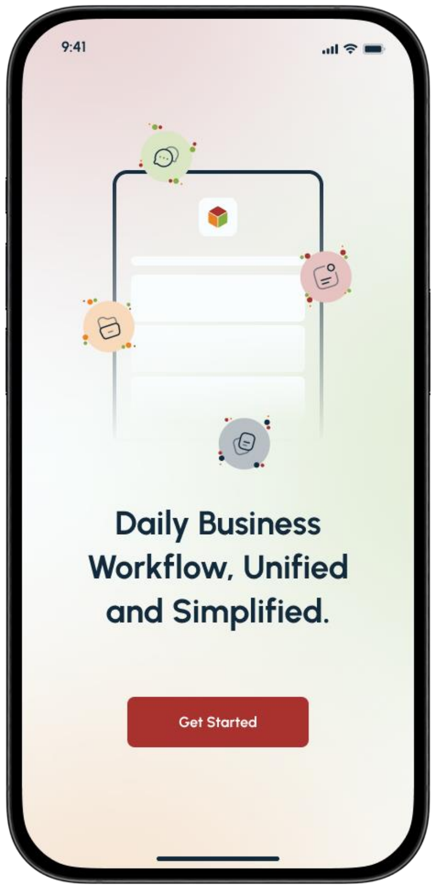
Installing the LathranSuite App

- **Go to the App Store/Google Play** on your device.
- Search for LathranSuite.
- Click **Install** and wait for the app to download.
- Once installed, **open the app.**

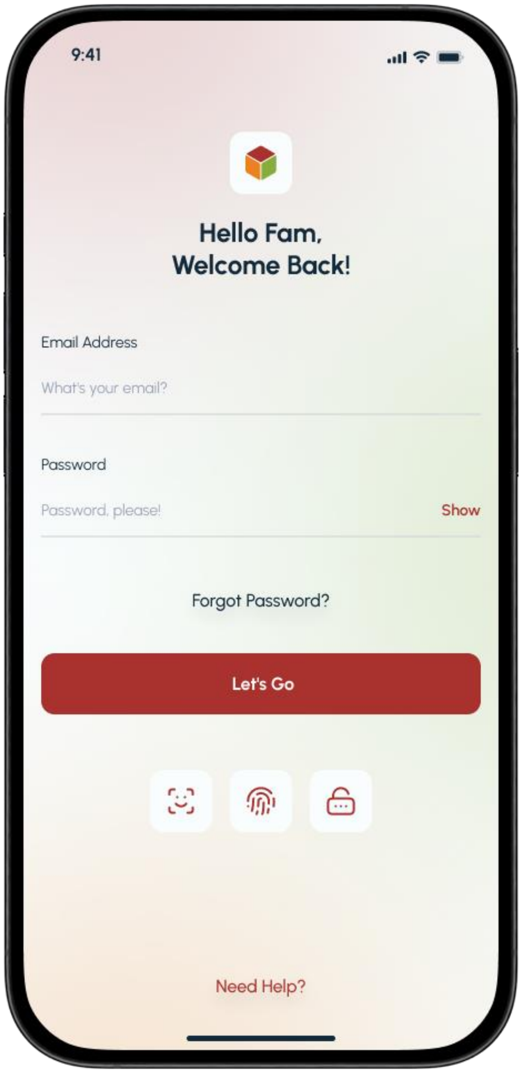
Splash Screen & Onboarding

- When you open **LathranSuite**, you're greeted by a sleek and minimalistic splash screen featuring our logo.
- Before logging in, you'll be guided through onboarding screens that
- highlight **LathranSuite's core features** — such as messaging, document management, and ticketing and forms.



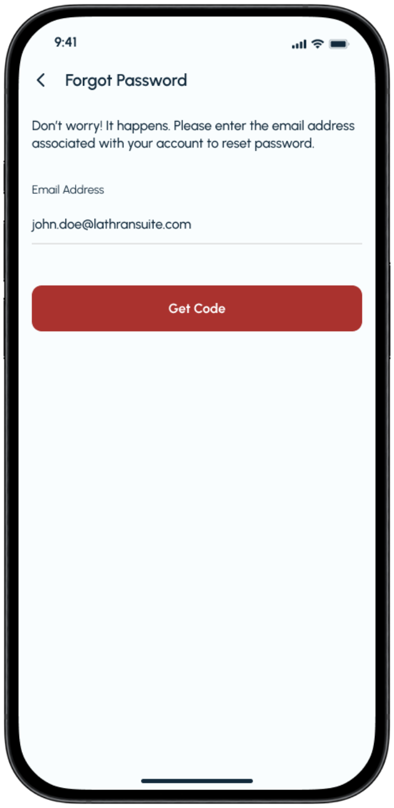
Loging in an Account

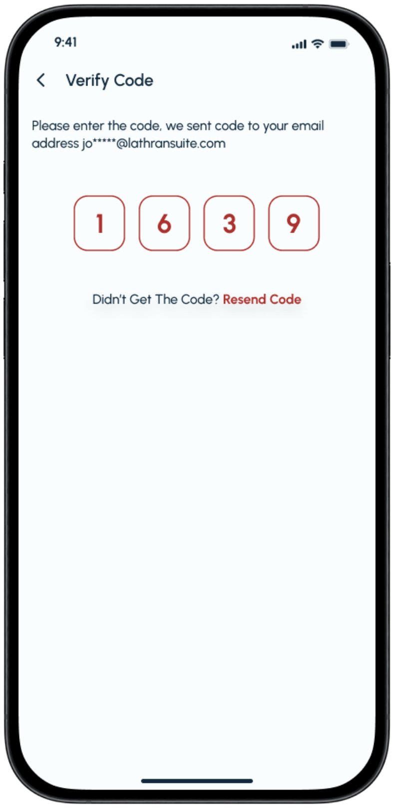
- Open the **LathranSuite app**.
- After the welcome screen you see a login screen.
- Enter your **email address**, and **password**.

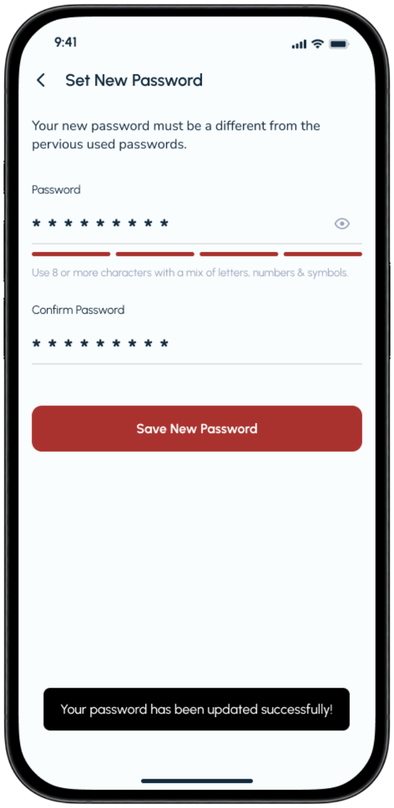


Forgot Password

- From the login screen, tap the **Forgot Password** link located below the login fields.
- You'll be directed to a **Forgot Password** page.
- Enter the email address associated with your LathranSuite account.
- Tap the **Get Code** button to receive a verification code.
- Check your inbox for an email from LathranSuite containing a **verification code**.
- If you don't see it, check your spam/junk folder or tap **Resend Code** if the email doesn't arrive after a few minutes.
- Return to the LathranSuite app.
- Enter the **4-digit verification code** that was sent to your email.
- Once entered, tap **Verify Code** to proceed.
- After verifying the code, you'll be taken to the **Set New Password** screen.
- Enter your **new password** in the provided field.
- Confirm the password by entering it again in the **Confirm New Password.**
- Tap **Save New Password** to complete the reset.
- You'll receive a confirmation message that your password has been successfully reset.
- Tap **Go to Login** to return to the login screen and use your new password to log in.

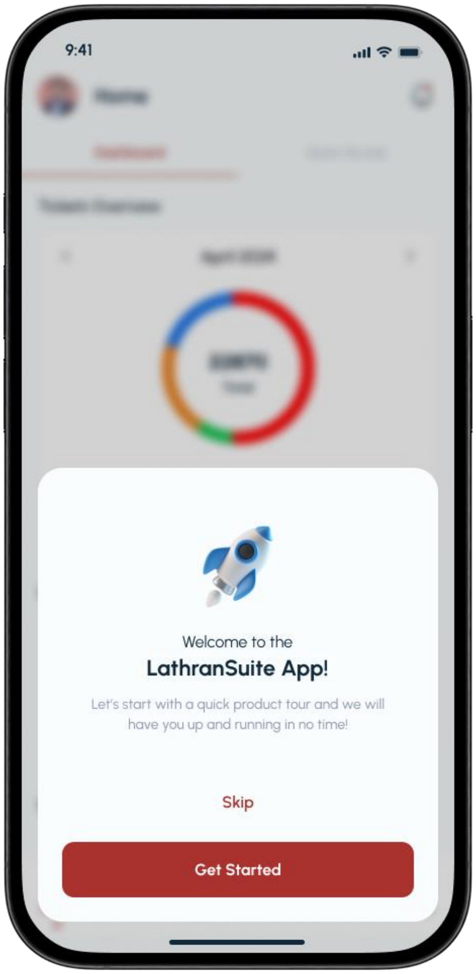


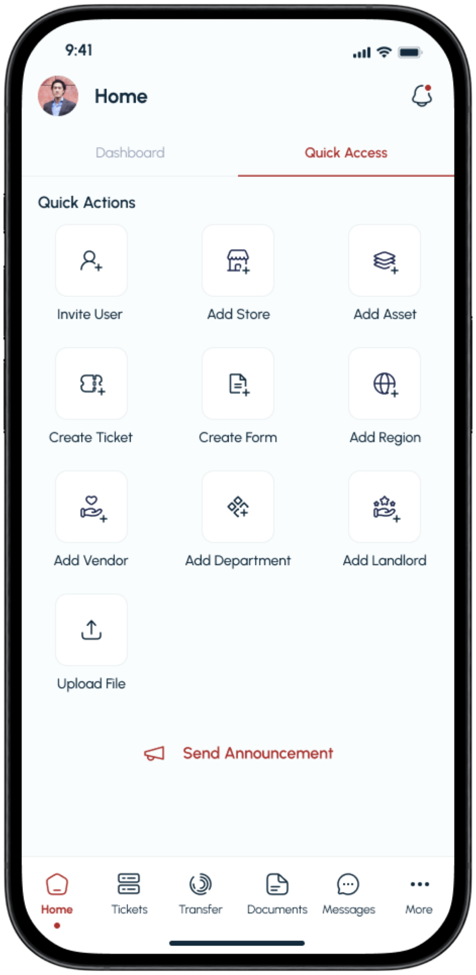




Welcome and Setup

- Upon logging in, you will see a Wow Modal.Click on ‘Get Started’. You will automatically land on the **Quick Access** tab of the LathranSuite app.
- This section is designed to help you immediately perform essential actions.

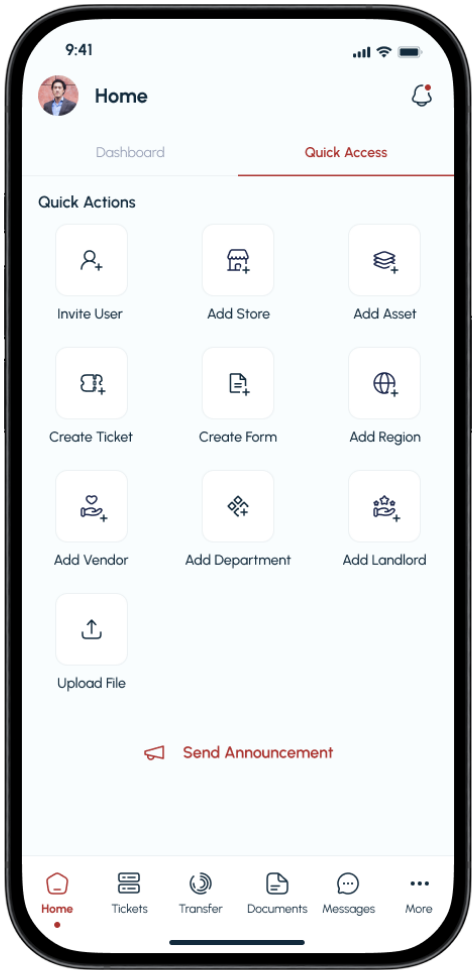


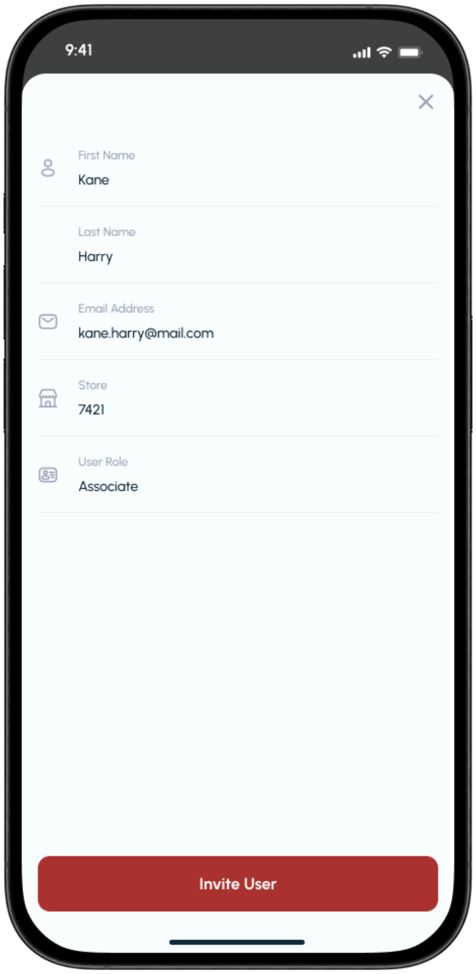


Quick Access:

Invite User:

- Tap **Invite User**.
- Enter the email address of the new user you want to invite.
- Select their **role** (e.g., Admin, Member, Guest) and tap **Send Invitation**. The user will receive an email to join your workspace.





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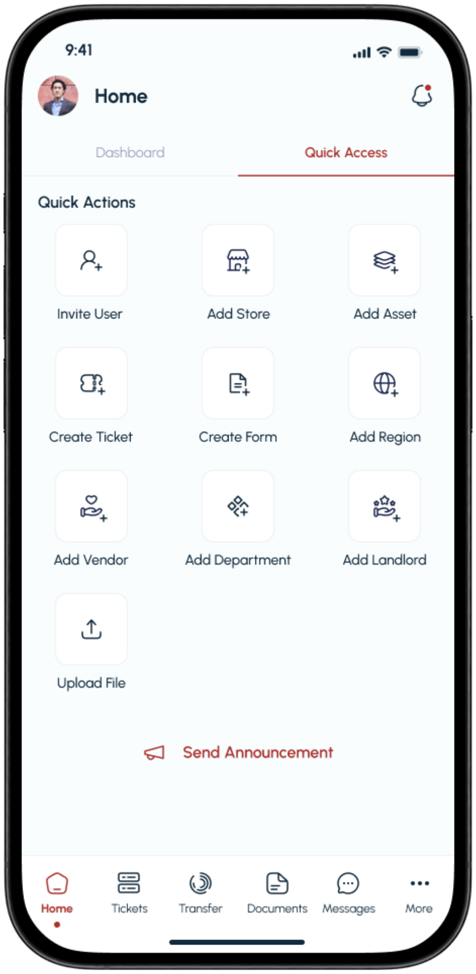
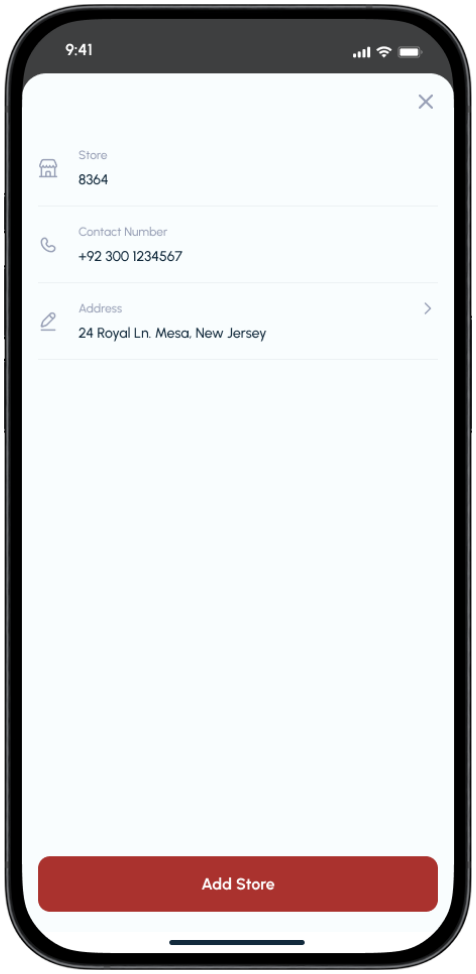
Add Store:

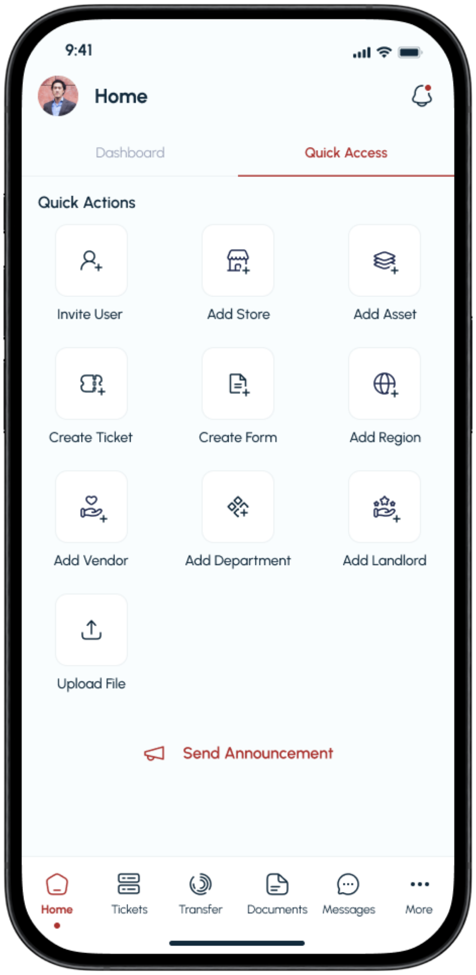
- Tap **Add Store**.
- Enter the **store name** and relevant information (location, store manager, etc.).
- Tap **Save** to add the new store to your system.

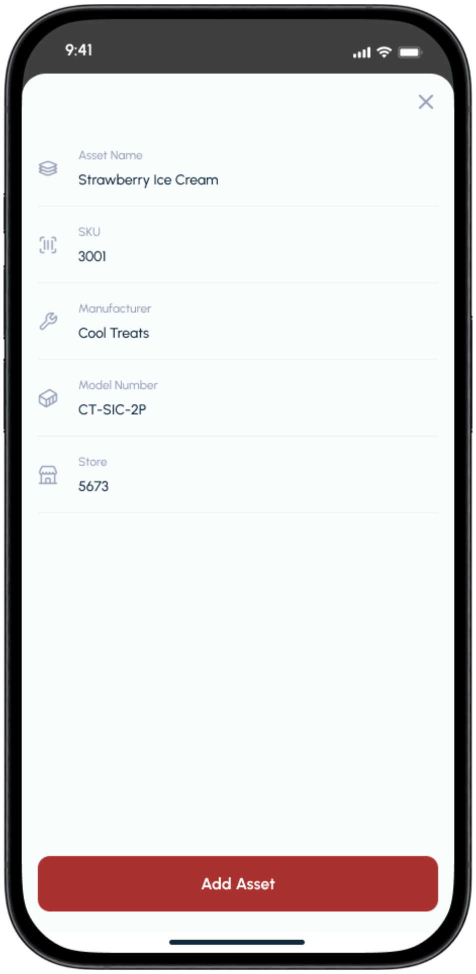




Add Asset:

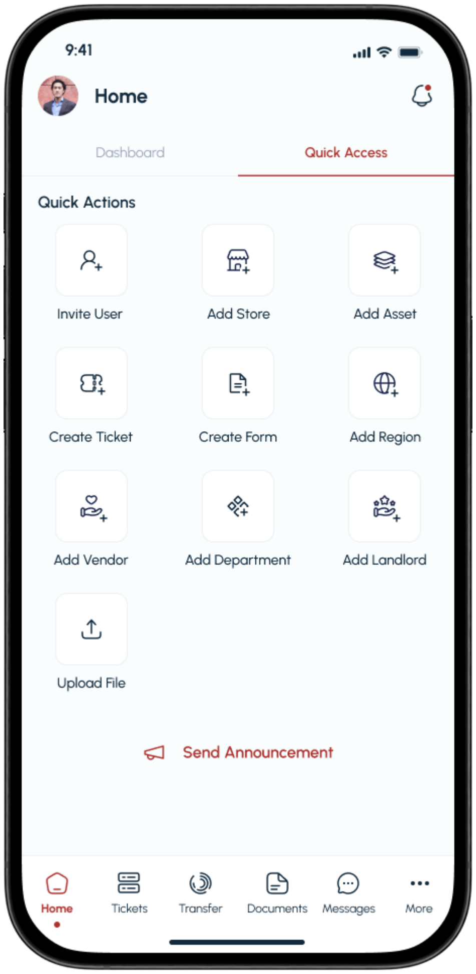
- Tap **Add Asset**.
- Fill in the asset details, such as **name**, **type** (physical or digital), and
- **description.**
- Tap **Save** to log the asset into the system for tracking.

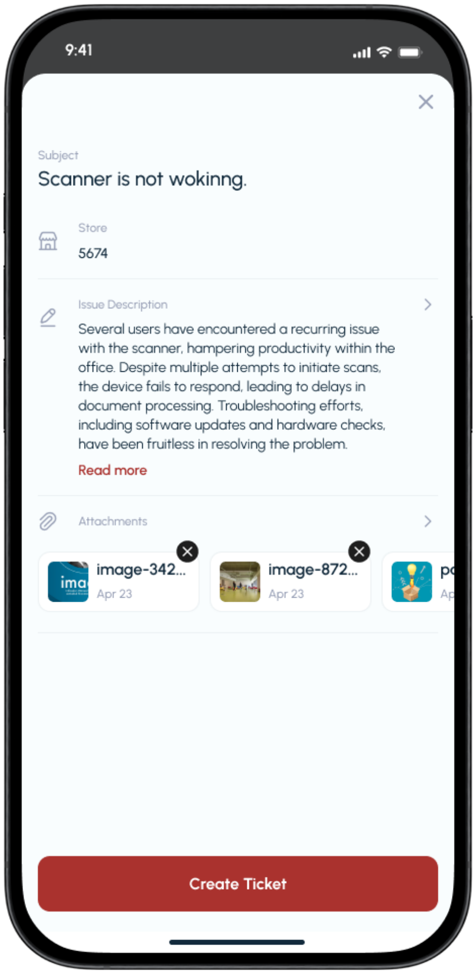




Create Ticket:

- Tap **Create Ticket**.
- Fill in the **ticket title**, **description**, and **due date**.
- Assign the ticket to a specific team member.
- Tap **Submit** to create the ticket and start tracking the task.





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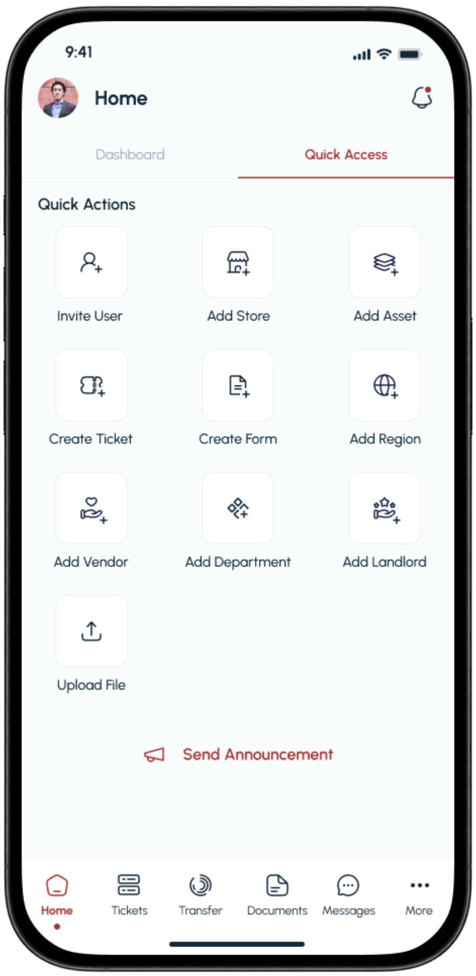
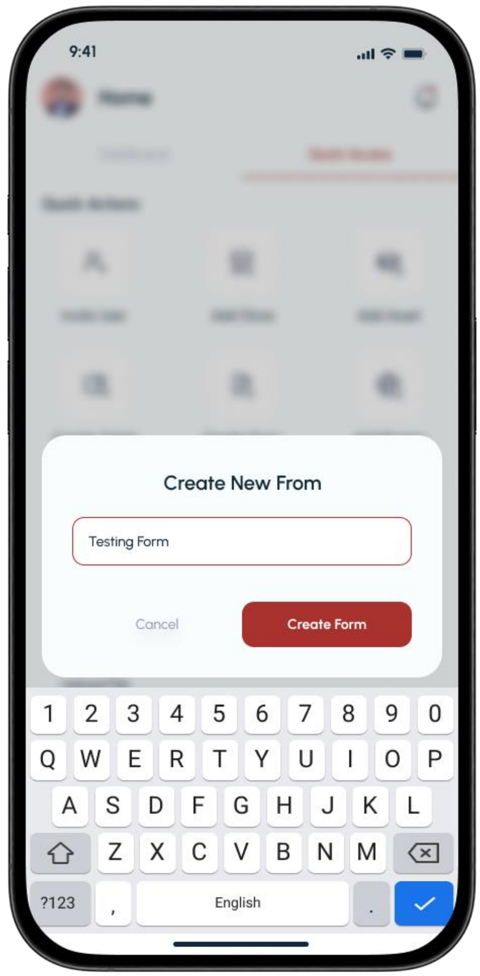
Create Form:

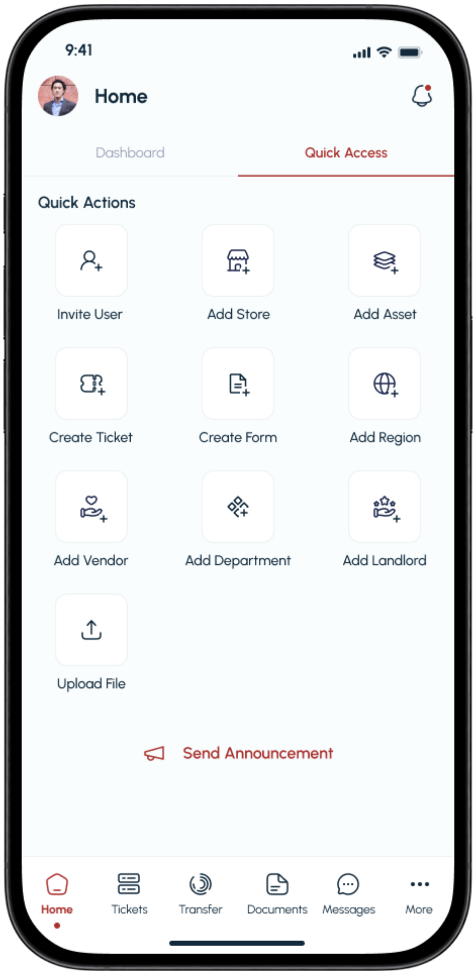
- Tap **Create Form**.
- Add the necessary fields (text fields, dropdown menus, date pickers, etc.). Name the form and tap **Save**.
- The form will be available for users to fill out and submit.

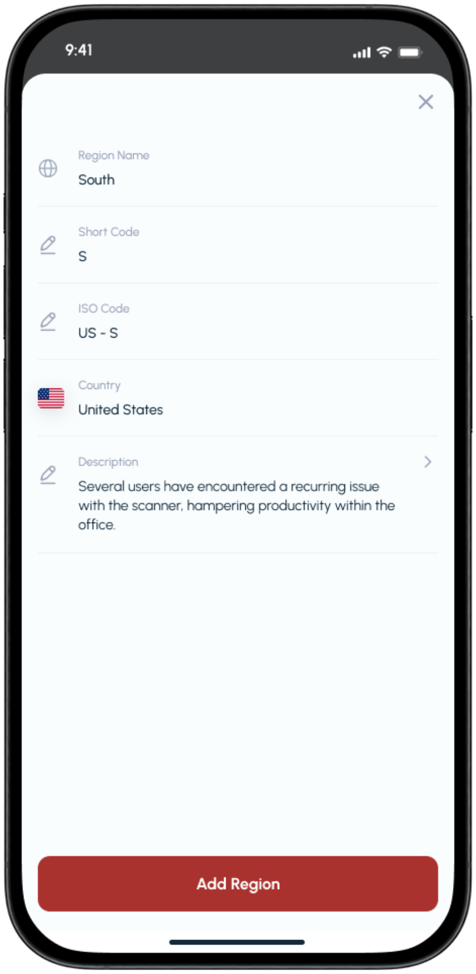




Add Region:

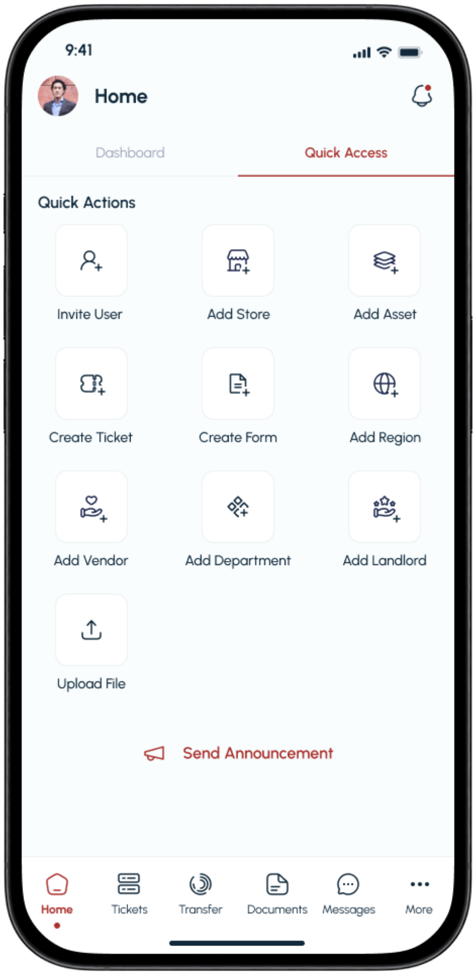
- Tap **Add Region**.
- Enter the **name** and **description** of the region.
- Tap **Save** to add the new region to your system, which can later be used for location-based management.

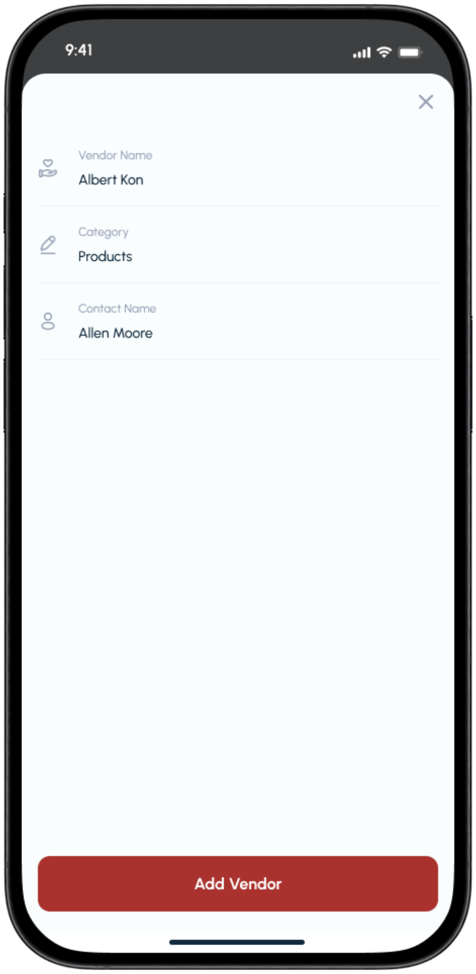




Add Vendor:

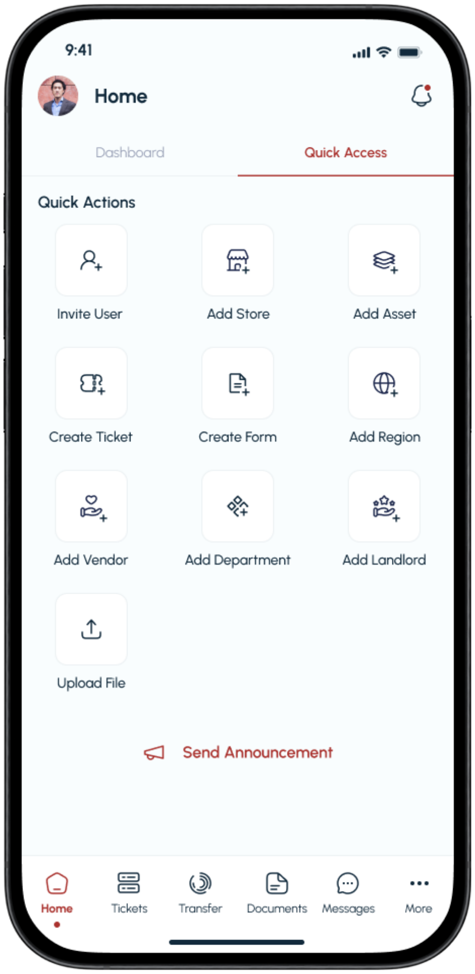
- Tap **Add Vendor**.
- Input the vendor's **name**, **company**, and **contact details**.
- Tap **Save** to include the vendor in your contacts for easier vendor management.

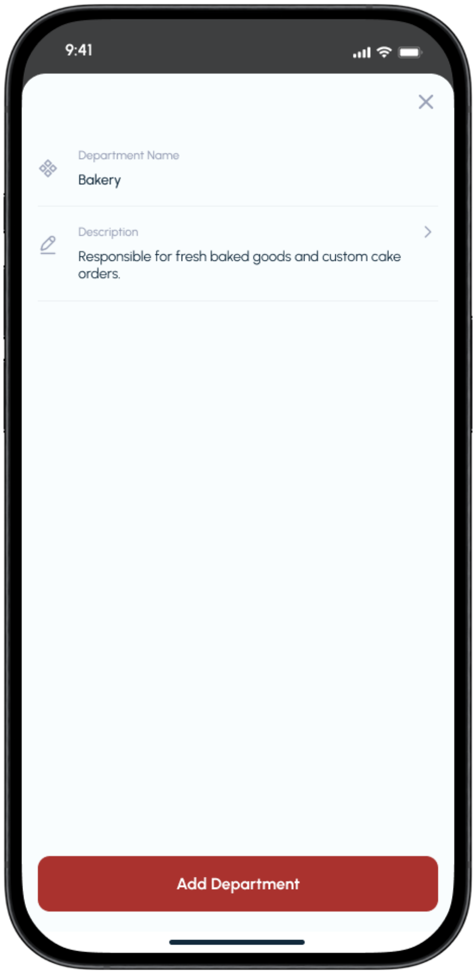




Add Department:

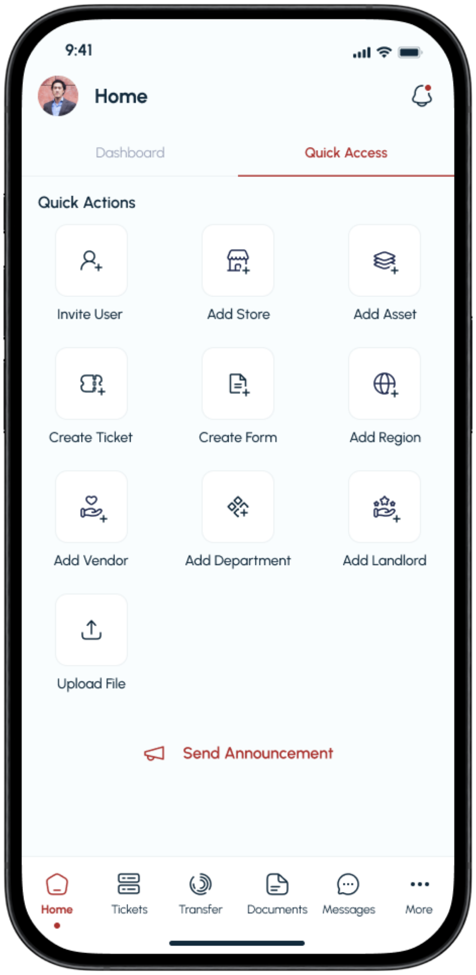
- Tap **Add Department**.
- Name the department and assign it a **department head**.
- Tap **Save** to include the department in your organization's structure.

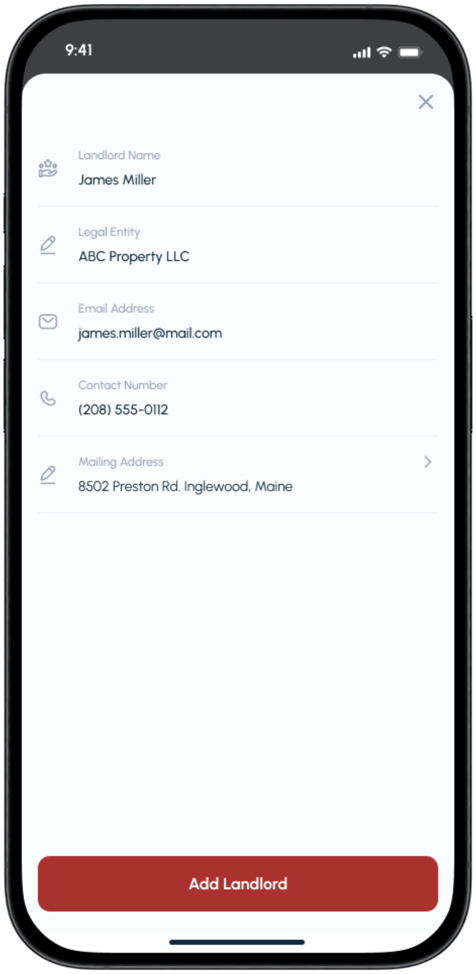




Add Landlord:

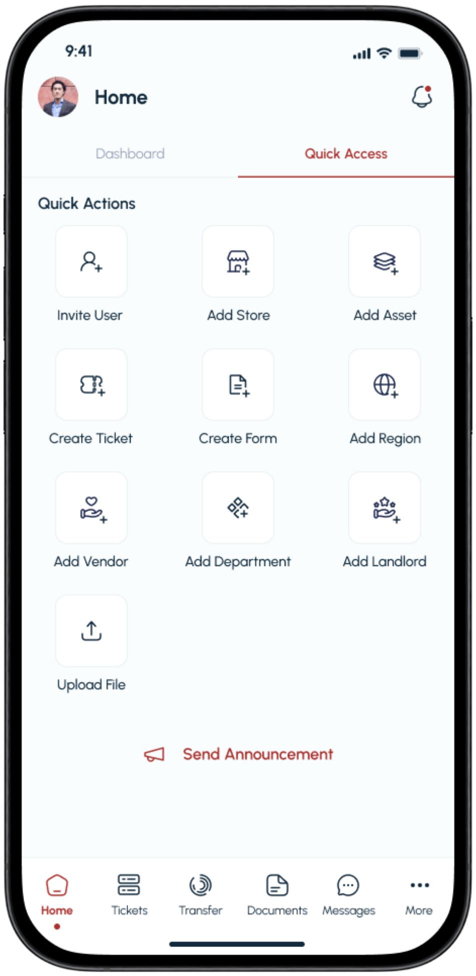
- Tap **Add Landlord**.
- Enter the **landlord's name**, **contact details**, and relevant property information.
- Tap **Save** to add the landlord to your system for property management purposes.

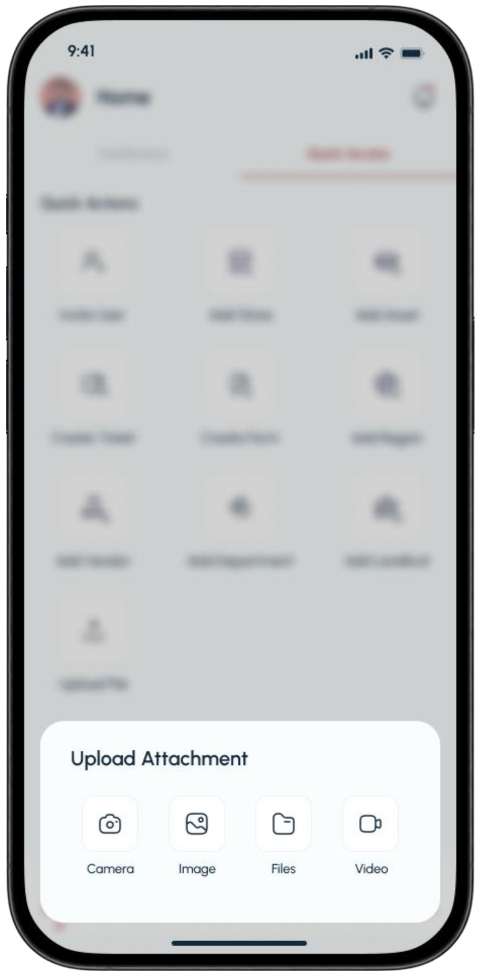




Upload File:

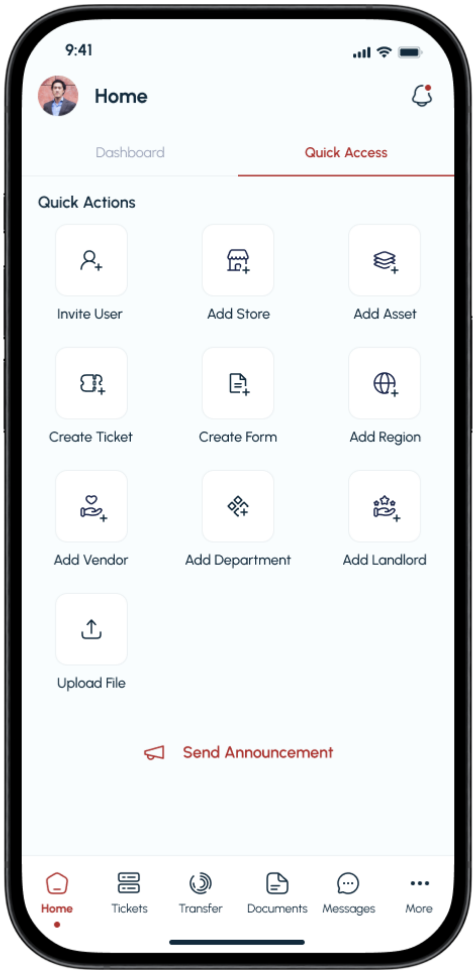
- Tap **Upload File**.
- Choose a file from your device.
- Name the file (if needed) and tap **Upload** to save it in the system, making it accessible for others to view and edit.

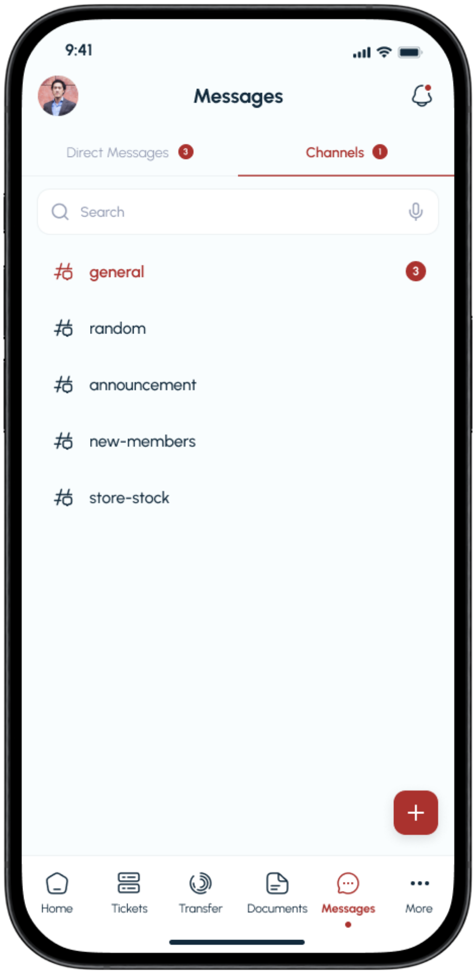




Send Announcement:

- Tap **Send Announcement** (red button at the bottom).
  Type your message in the provided text box.
- Specify who will receive the announcement (e.g., all users, specific departments).
- Tap **Send** to broadcast the message.

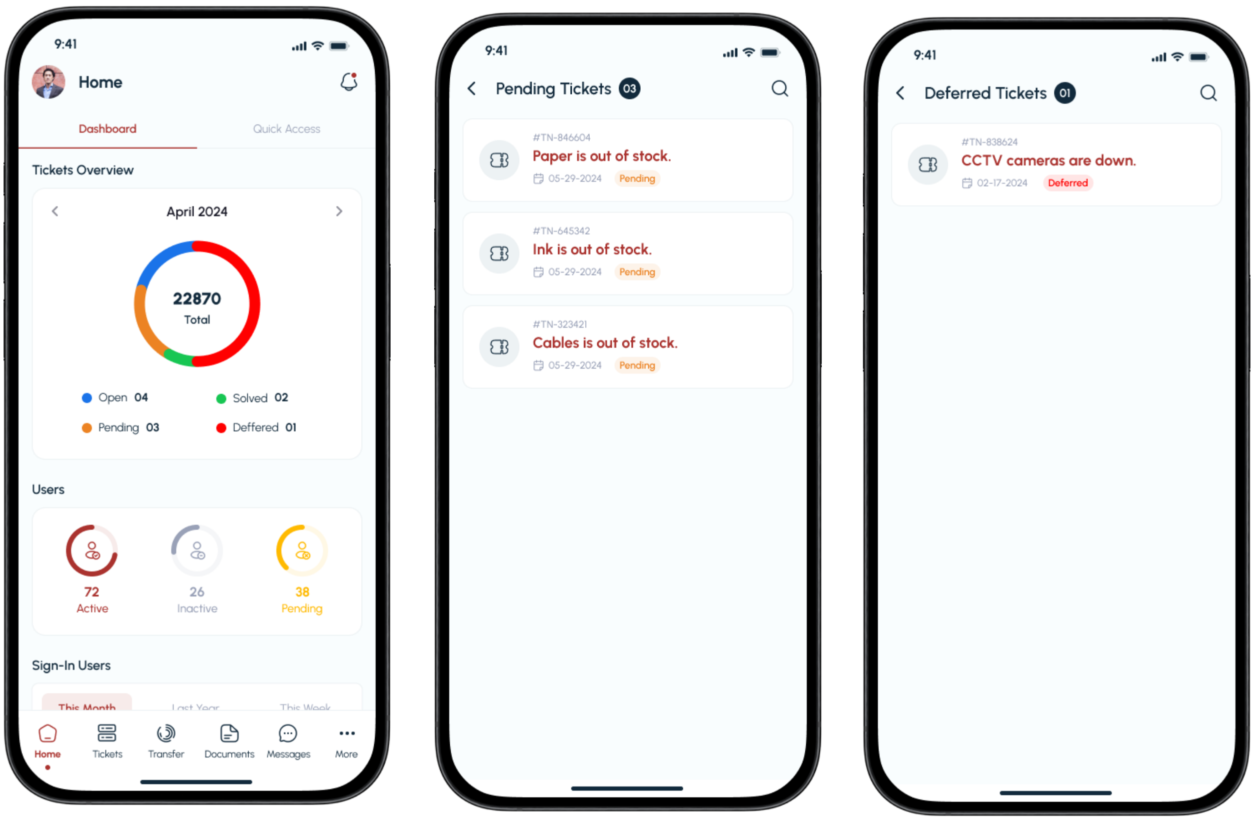




Click on Dashboard

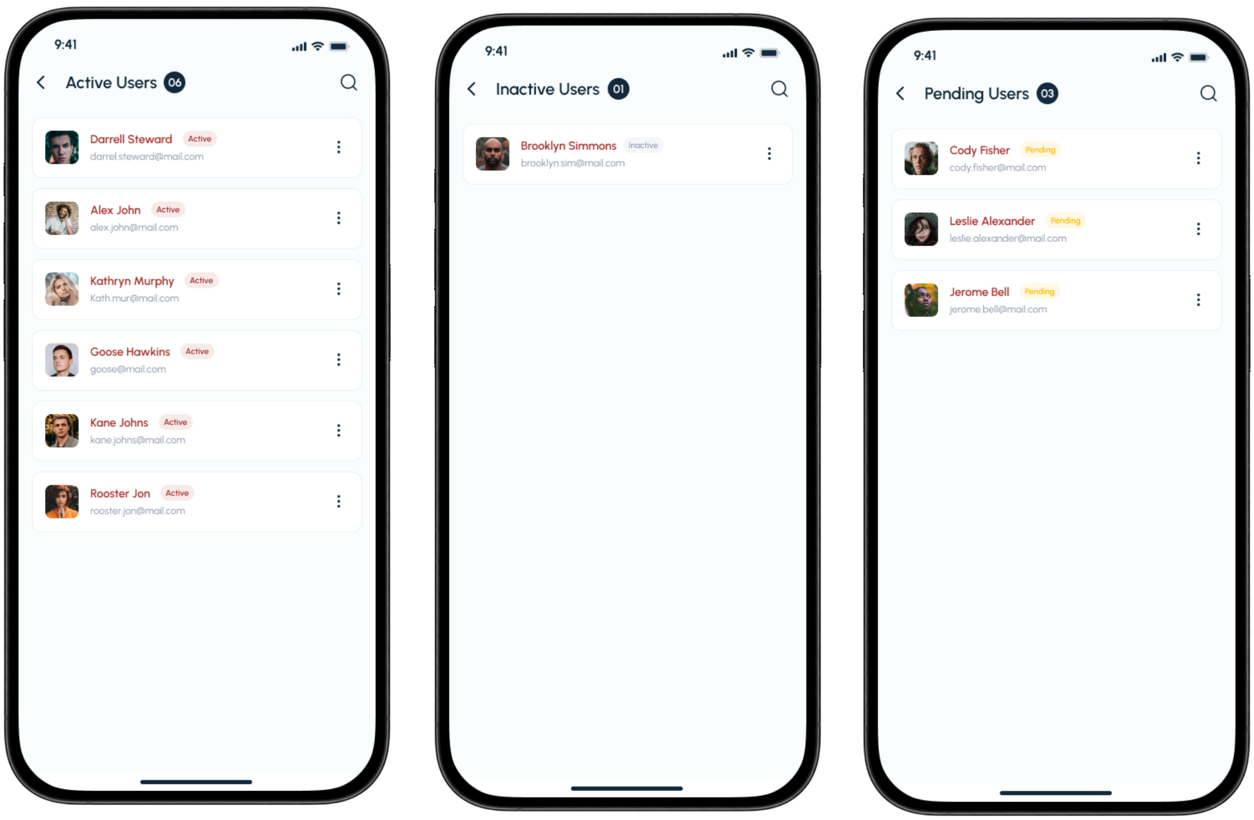
Tickets Overview:

- The first section in the Dashboard is the **Tickets Overview**.
  - **Pending Tickets**: These are the tickets that need to be worked on.
  - **Deferred Tickets**: These are tickets that have been delayed or postponed.



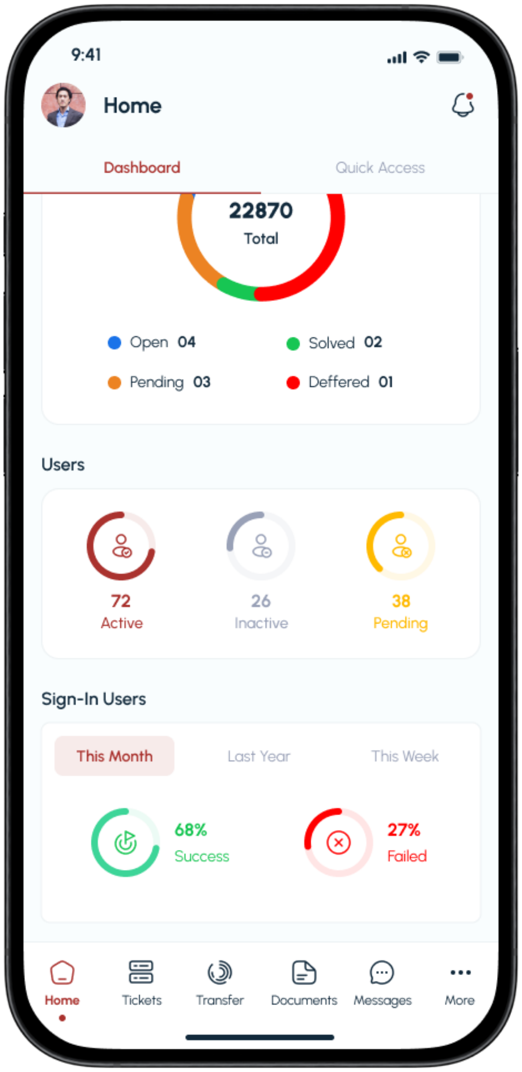
Users Overview:

- The next section provides a breakdown of **Active**, **Inactive**, and **Pending Users**.
  - **Active**: Users who are currently active and engaged in the system.
  - **Inactive**: Users who are part of the system but not currently active.
  - **Pending**: Users who have been invited but haven’t completed the registration process yet.



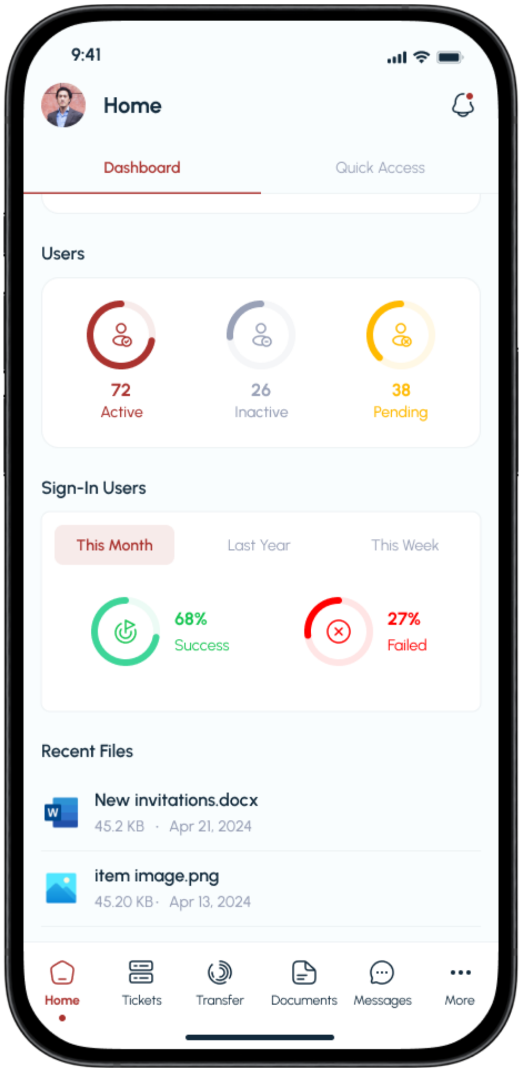
Sign-In Users (Performance):

- This section gives you insight into the **sign-in performance** of users.
  - **Success Rate**: Percentage of users who have successfully signed in.
  - **Failed Logins**: Percentage of failed login attempts.
- You can view the stats for different time frames:
  - **This Month**: Overview of sign-ins for the current month.
  - **Last Year**: Review last year's performance to see trends over time.
  - **This Week**: Keep track of user activity for the current week.



Recent Files:

- Displays a list of the most recently uploaded or modified documents.
- Each file shows:
    - **File name**
    - **File size**
    - **Upload date**
- You can click on any file to download, copylink, favorite, move, copy, sedd details or sha re it with team members.



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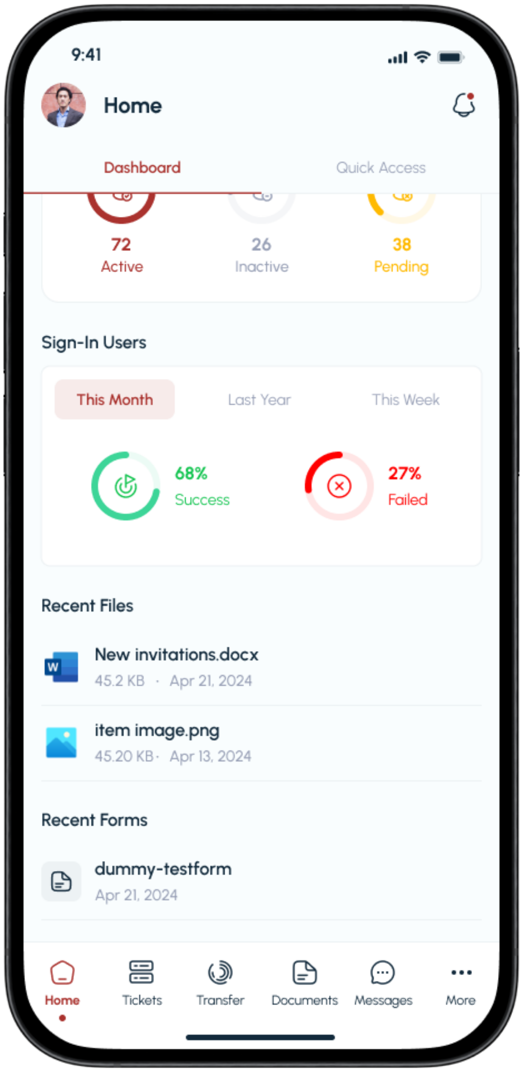
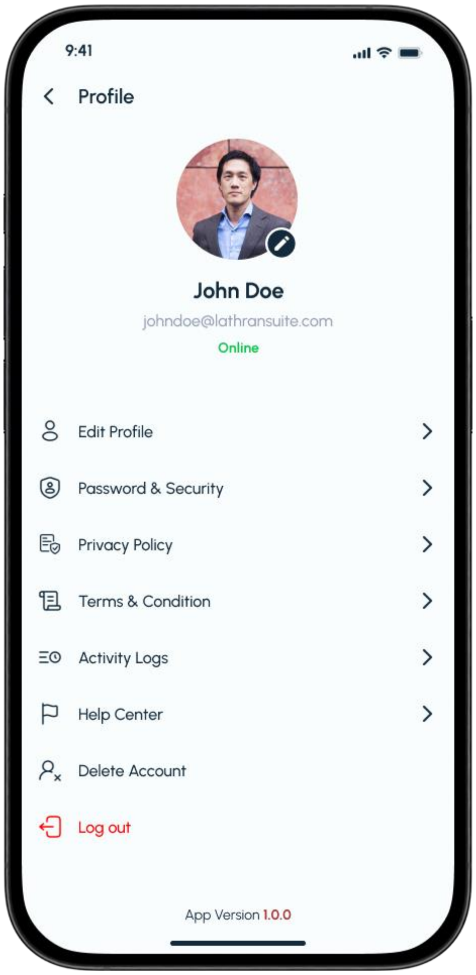
Recent Forms:

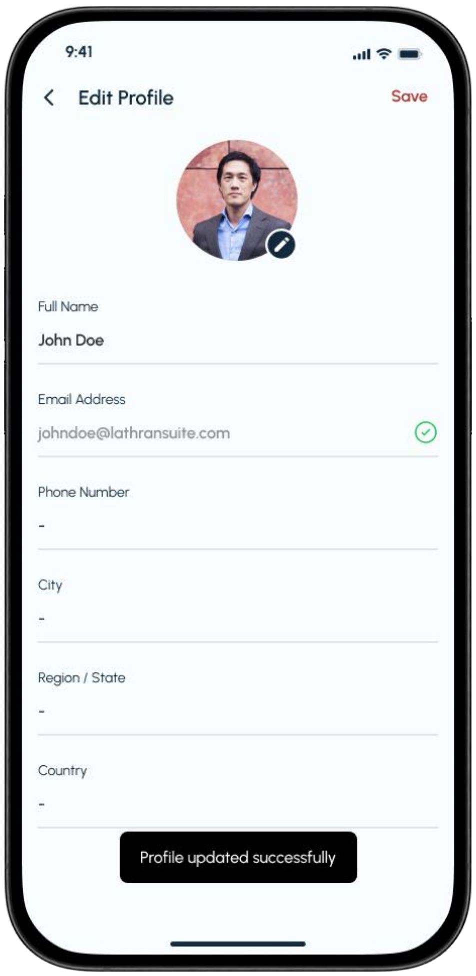
- Like the recent files section, this shows the most recently created or used forms.
- The form name and creation date are displayed (e.g., "dummy-testform" on April 21, 2024).
- Click on any form to view responses or edit the form itself.



Profile

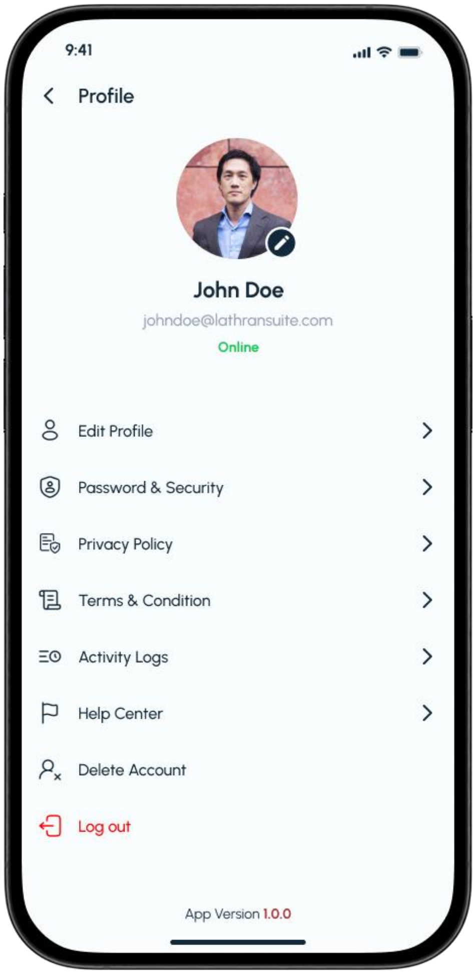
- Tap on **Edit Profile** to update your personal details.
- You can change your **full name**, **email address**, and **phone number**.
- Update your **status** (e.g., Active, Busy, Away)
- After making changes, click **Save** to update your profile.

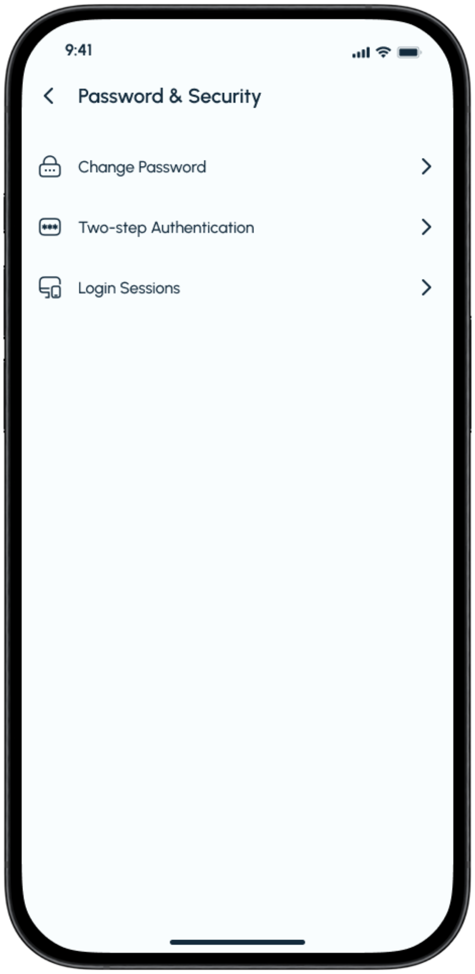




Password & Security:

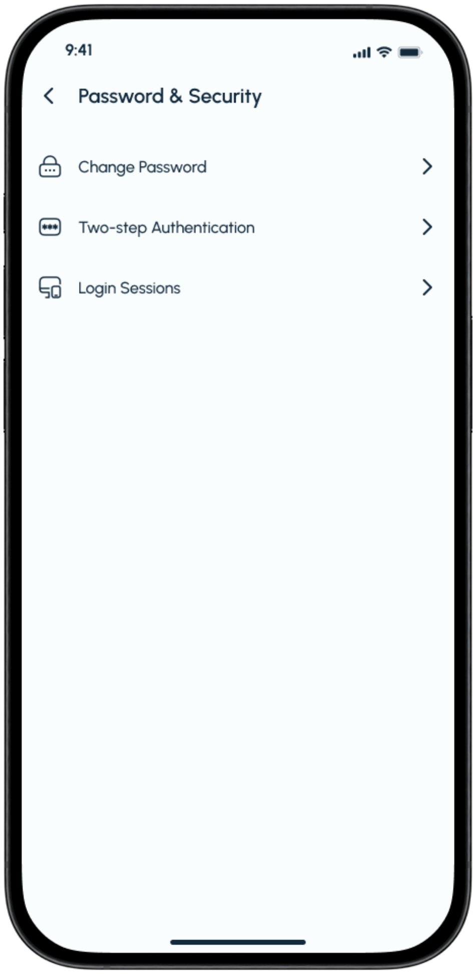
- Tap on **Password & Security** to manage your login credentials and account security.

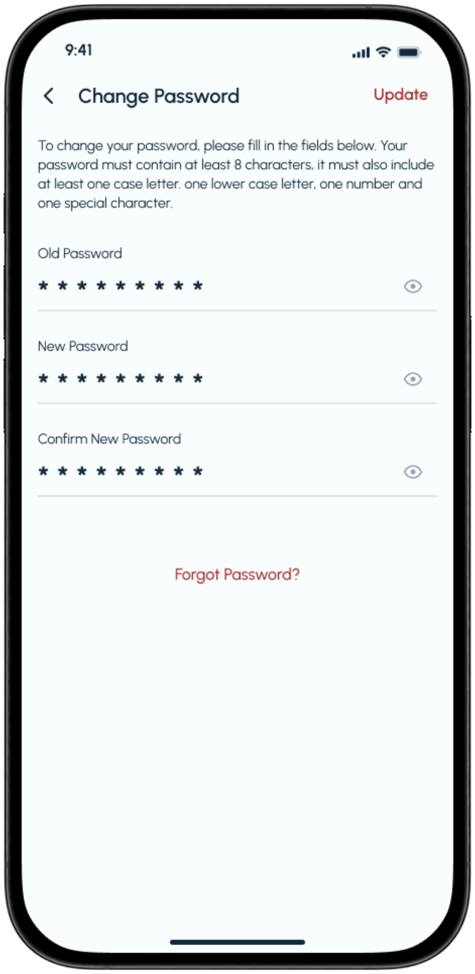




Change Password:

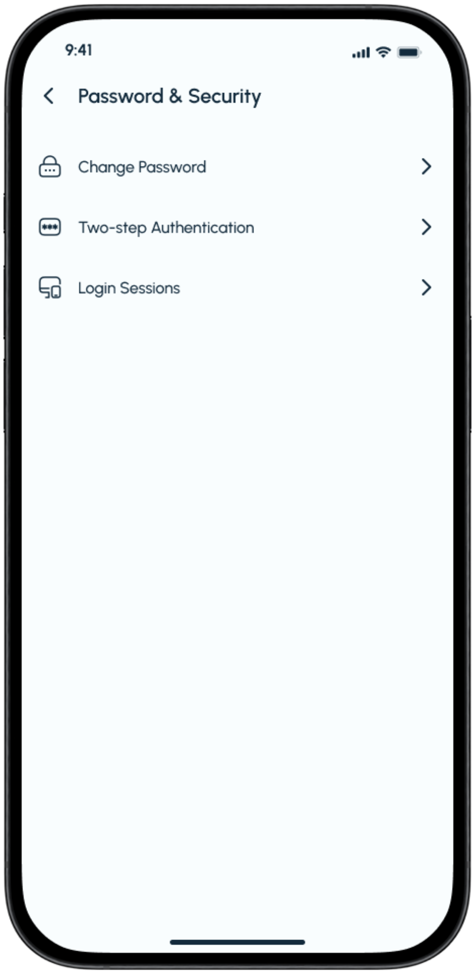
- Tap on **Change Password**.
- Enter your **old password**, then create and confirm a **new password**.
- If you've forgotten your password, tap **Forgot Password?** to initiate a recovery process.

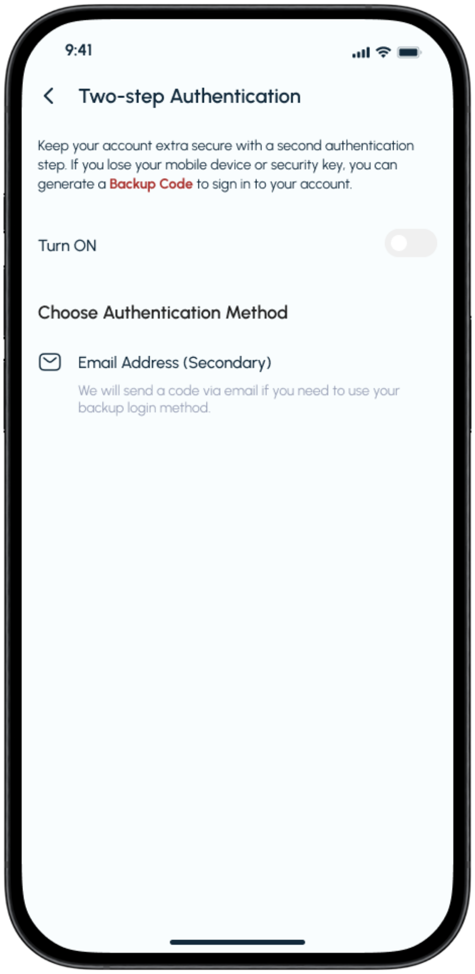




Two-step Authentication:

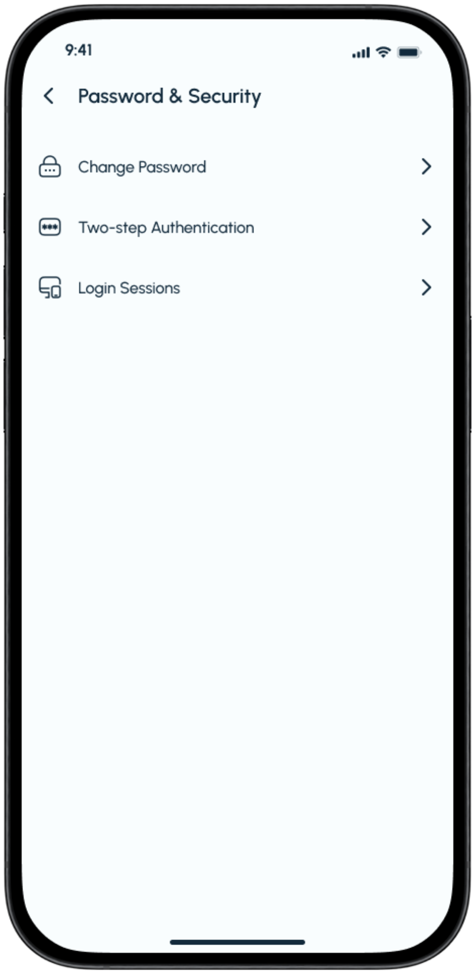
- Tap on **Two-step Authentication** to enable an extra layer of security. Choose **Email** for receiving verification codes.
- Toggle the **switch** to turn on two-step authentication and enter your backup contact method if needed.

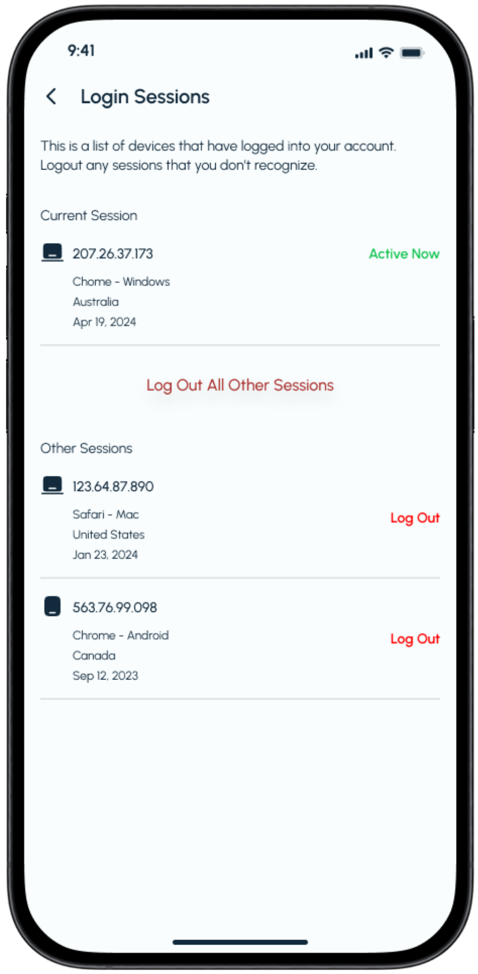




Login Sessions:

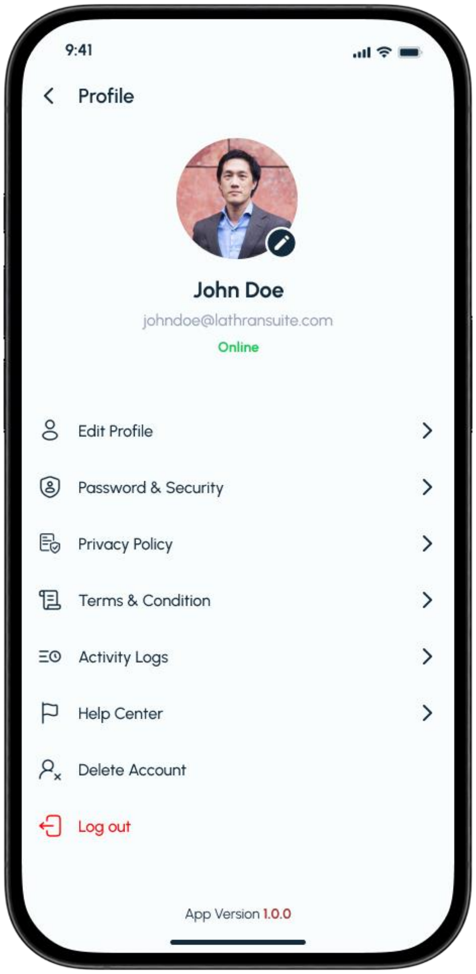
- View all devices that are currently logged into your account.
- You can log out of **specific sessions** or **all sessions** to secure your account if you suspect unauthorized access.

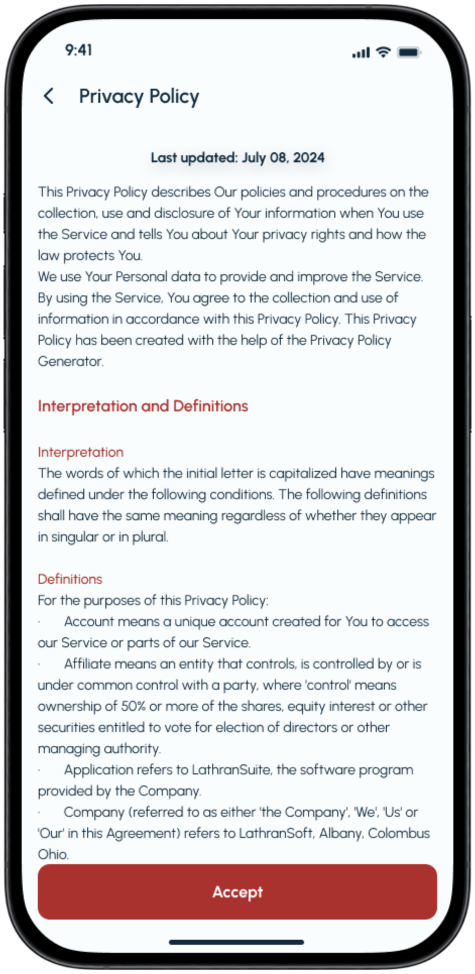




Privacy Policy:

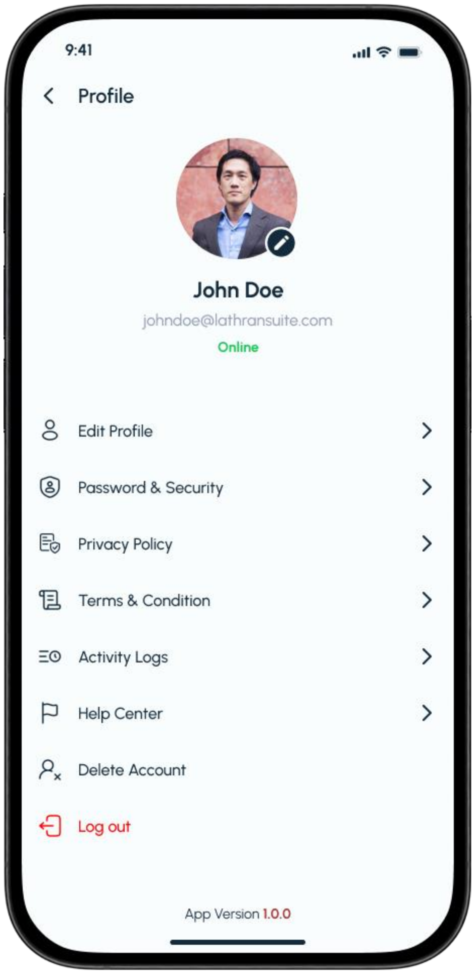
- Tap to review LathranSuite's **Privacy Policy** for understanding how your data is handled.

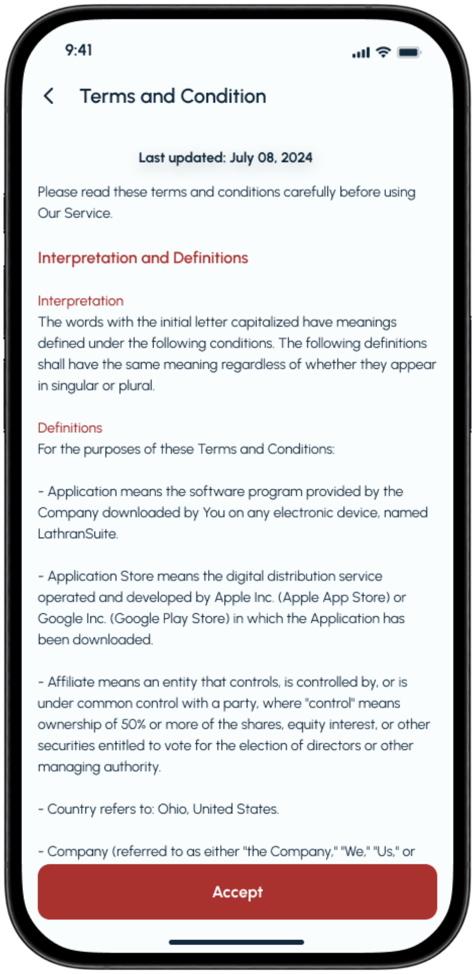




Terms & Conditions:

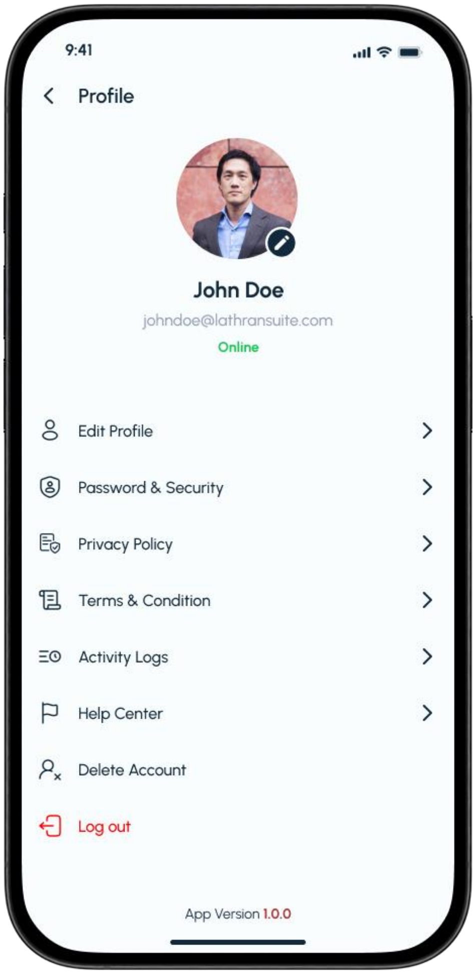
- Tap to read through the **Terms & Conditions** of using the app and its services.





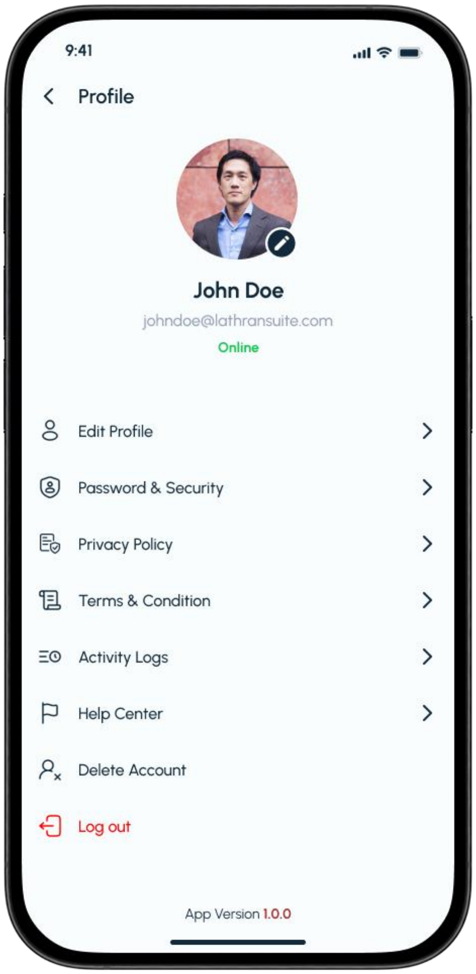
Activity Logs:

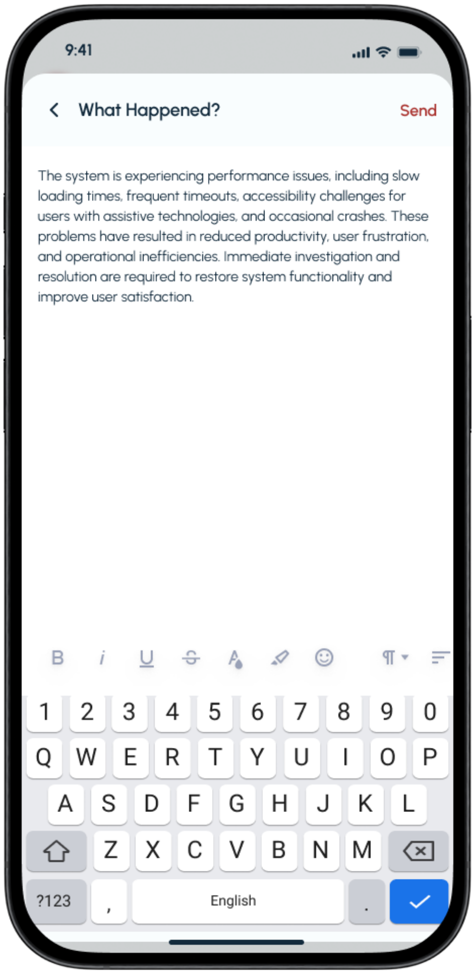
- Tap on **Activity Logs** to view a timeline of key actions related to your account:
- Login attempts, security warnings, and ticket updates.
- Each log shows the **action taken**, the **time of the event**, and any associated users.
- Use this to monitor activities and ensure there is no unauthorized activity on your account.



Help Center:

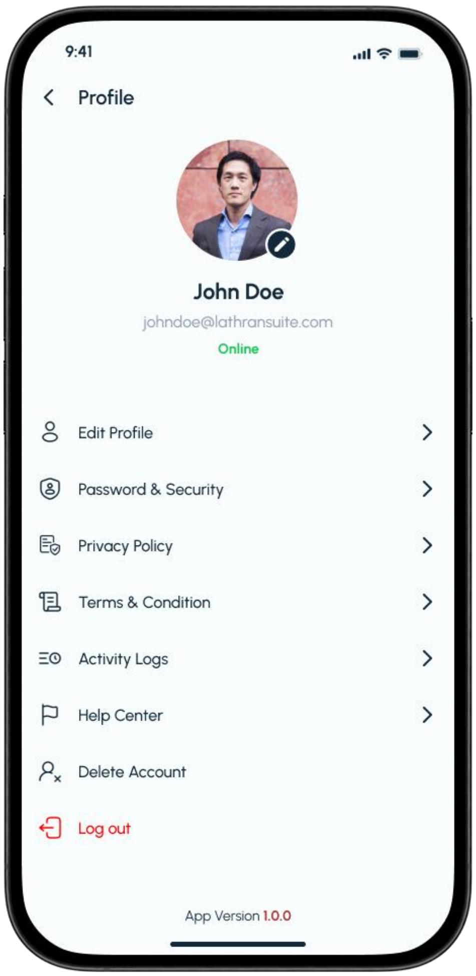
- Tap **Help Center** to access guides, FAQs, and customer support resources.
- You can submit questions or issues here if you need assistance with the app.

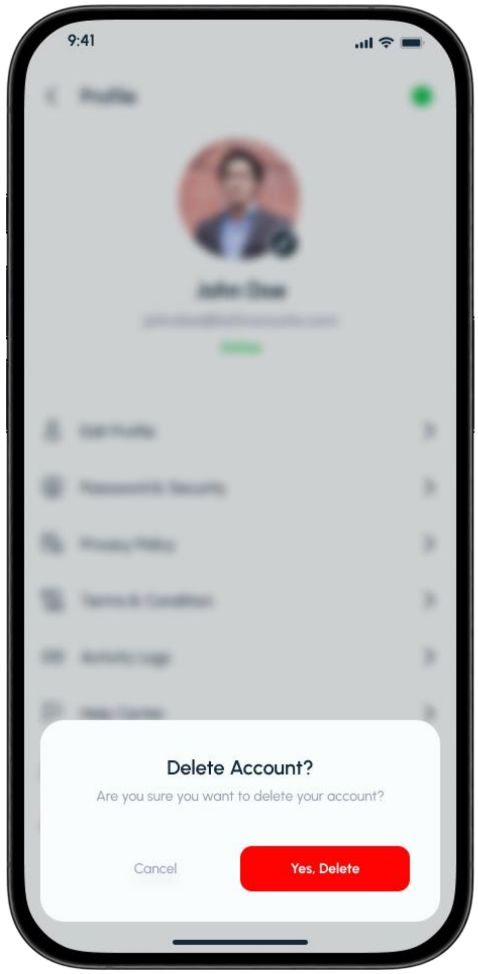




Delete Account:

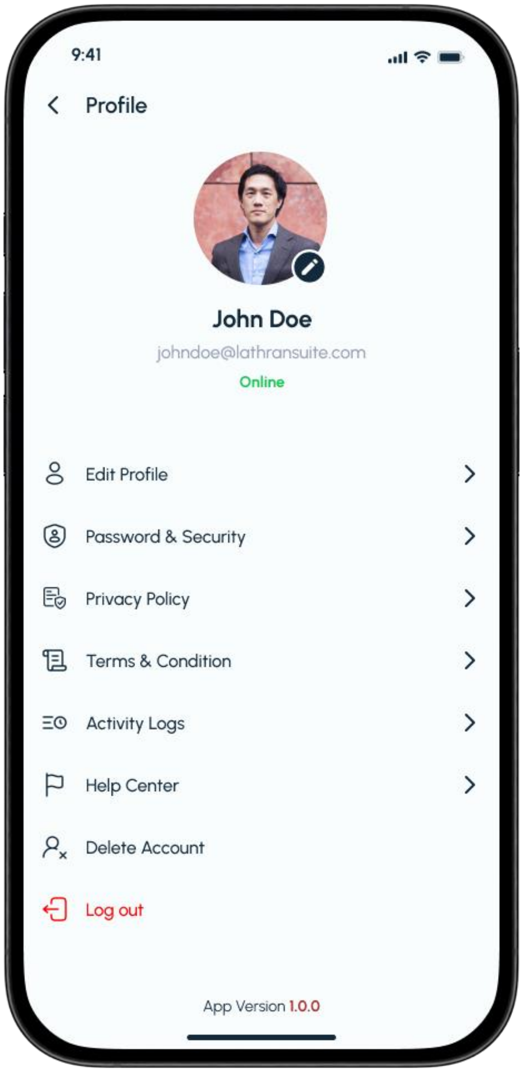
- If you wish to close your account, tap **Delete Account**.
- You will be prompted with a confirmation, and once confirmed, your account will be permanently removed.





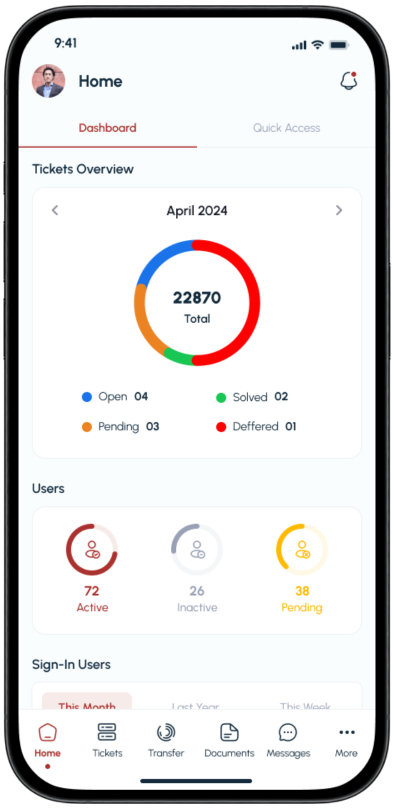
Log Out:

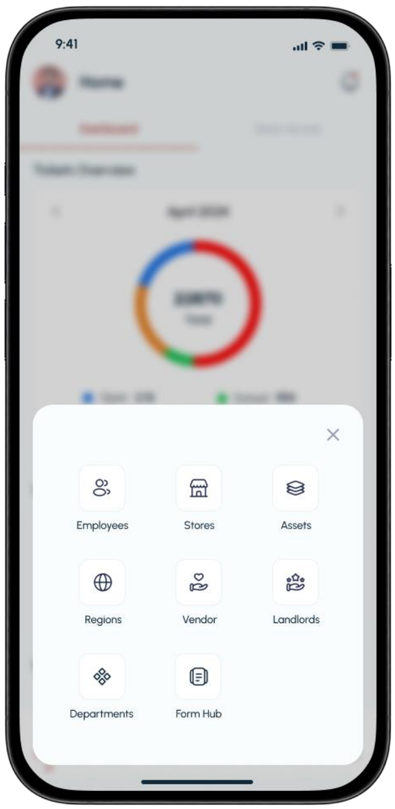
- Tap **Log Out** to securely sign out of the app.

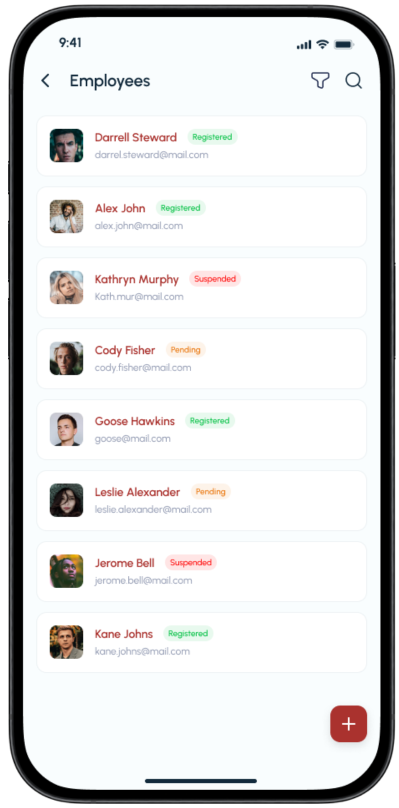


Employees

- From the **Home Screen**, tap the More […] then **Employees** icon or go to the **Quick Access** section and select **Invite User**.
- This takes you to the **Employees Dashboard**, where you can see a list of all employees, including their status:
    - **Suspended** (red)
    - **Pending** (yellow)
    - **Registered** (green)

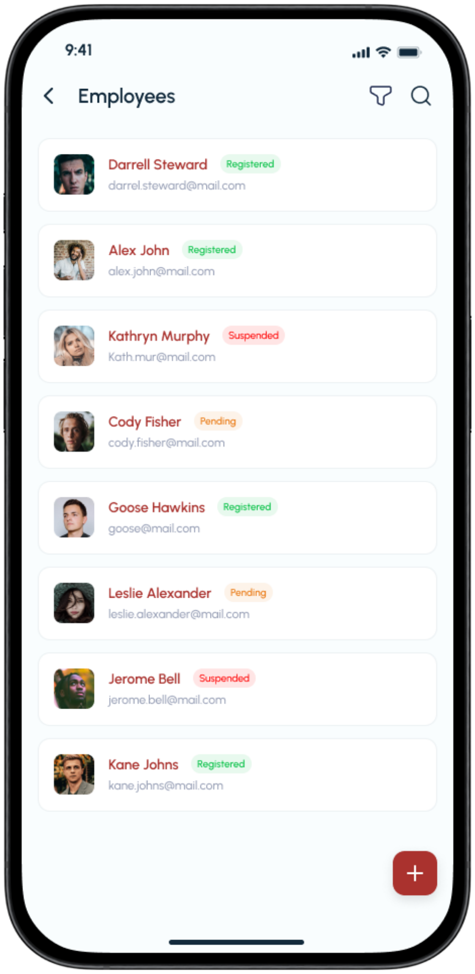


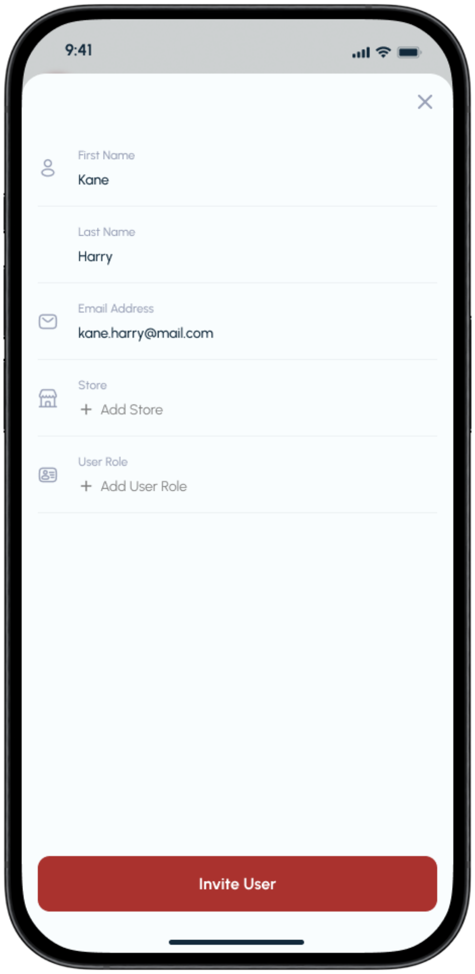




Inviting a New Employee

- Tap the **+ (plus)** icon in the bottom-right corner of the **Employees Dashboard**.
- You'll be prompted to enter details for the new employee.
  - **First Name**: Enter the employee's first name.
  - **Last Name**: Enter the employee's last name.
  - **Store**: Tap the **Add Store** field to select the employee's store location. Choose from the available store options (e.g., Store #7421).
  - **Role**: Tap the **Add User Role** field to select the role of the employee (e.g., Manager, Associate).
- Once the fields are filled out, tap **Invite User** or **Add User** to send an invitation.





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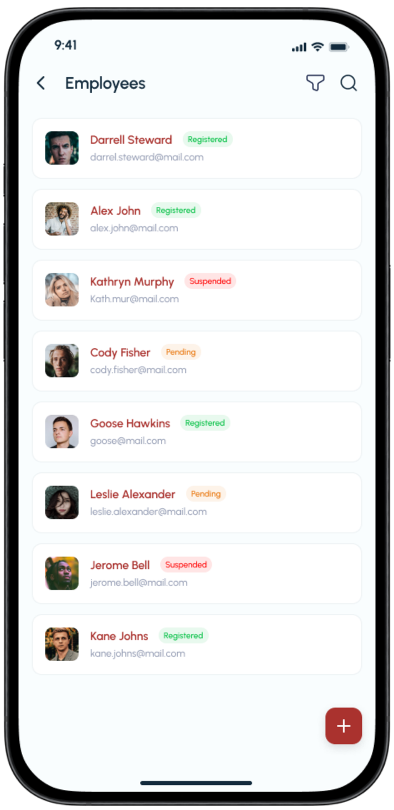
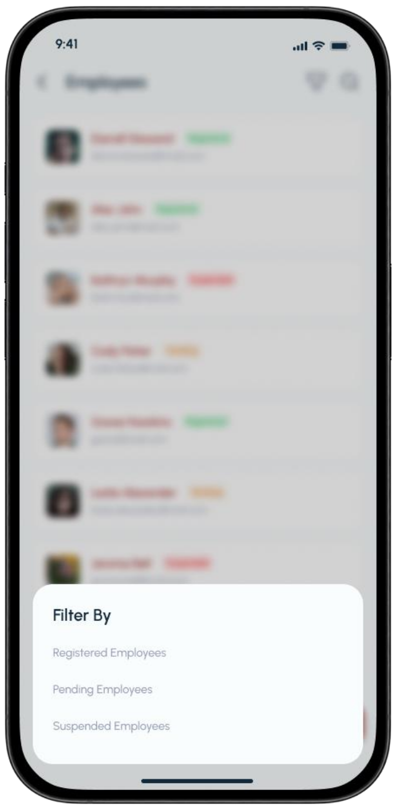
Managing Employee Status

- After inviting the employee, their status will initially appear as **Pending**.
    - Pending Employees:
      Employees who have been invited but haven't accepted the invitation will show under the **Pending Employees** tab.
- You can resend the invitation, if necessary, by tapping the **Resend Invite** option.
    - **Active Employees:**
      Once the employee accepts the invitation, their status will change to
    - **Inactive Employees:**
      If needed, you can change an employee's status to **Suspended**. This will limit their access to the platform.
- Tap the employees name, go to **Status**, and choose Inactive to update their account.

Filtering and Searching for Employees

- Use the **Filter By** option to view employees by their status:
  - Active Employees
  - Pending Employees
  - Inactive Employees
- Tap the **Search Icon** in the top-right corner to search for employees by name or email.
- After inviting employees or updating their status, always tap **Save Changes** to confirm your actions.





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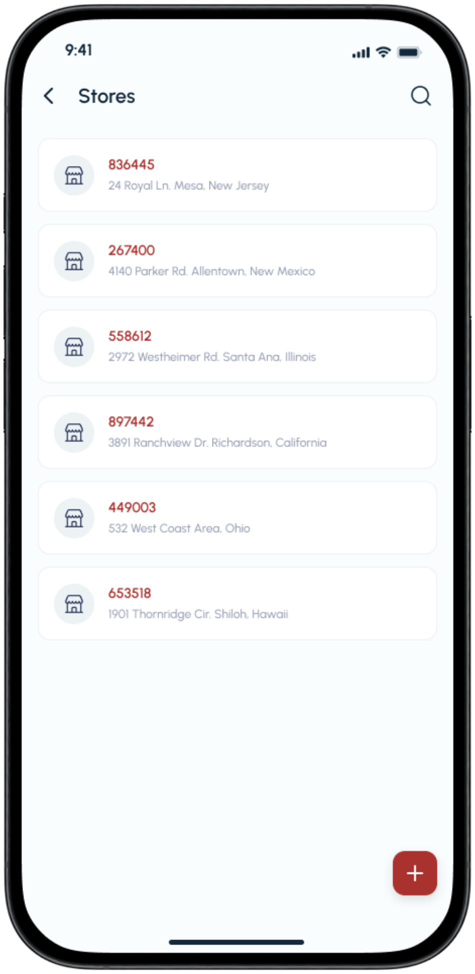
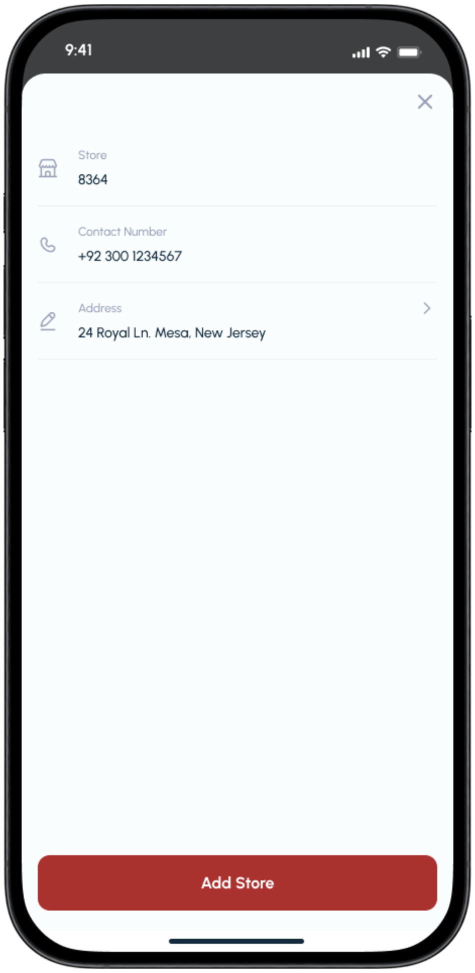
Managing Stores

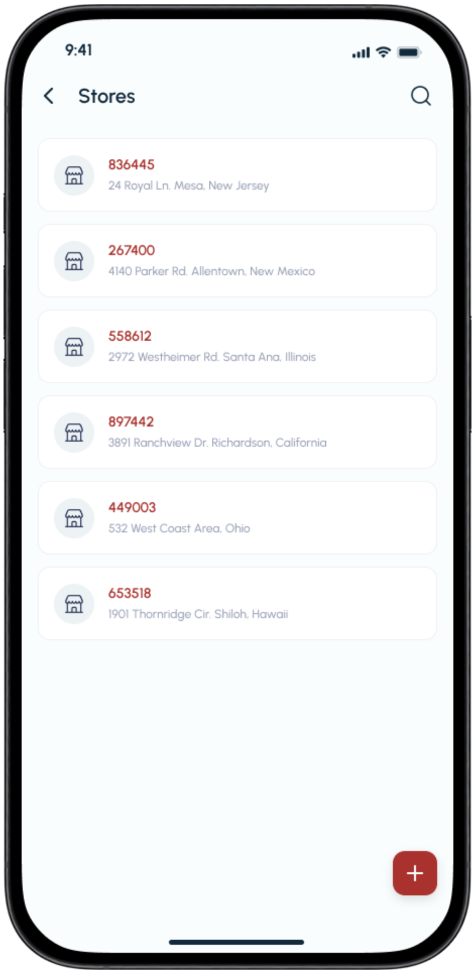
- Adding a New Store
- From the **Stores** screen, tap the **+ (plus)** button to add a new store.
- Fill in the required fields:
    - **Store Name**: Enter the store name.
    - **Contact Number**: Add the store's contact details.
    - **Address**: Provide the store's address.
- Tap **Add Store** to save the store.

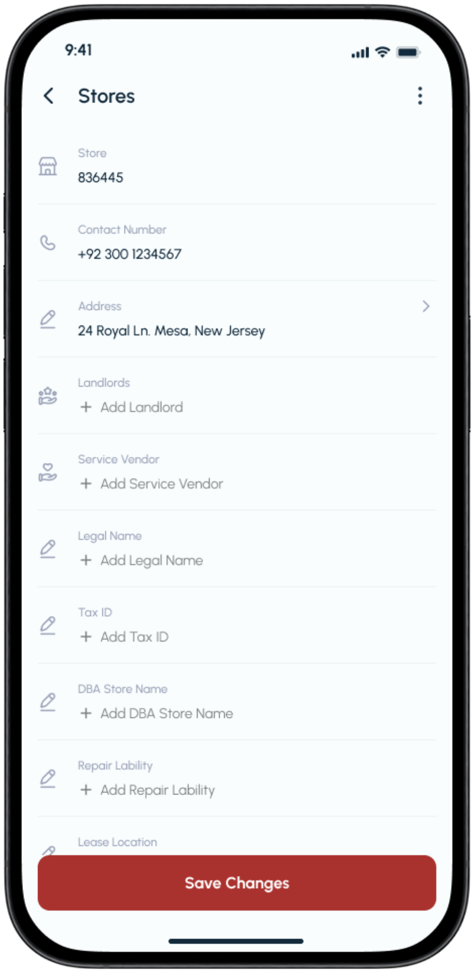




Editing a Store

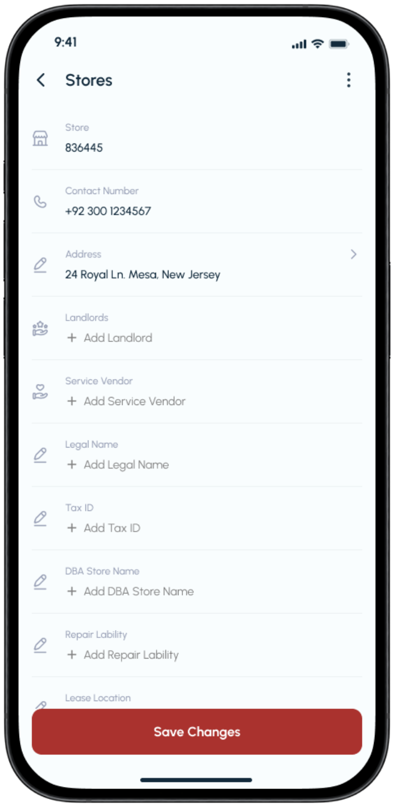
- Select the store you wish to edit.
- Update the store details such as name, contact, or address.
- Tap **Save Changes**.

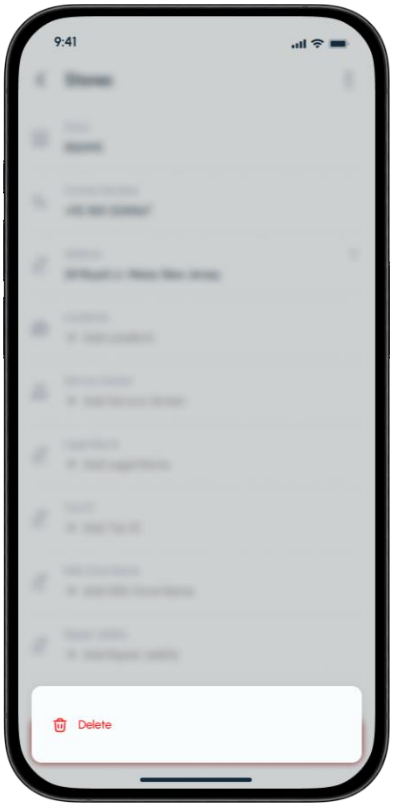


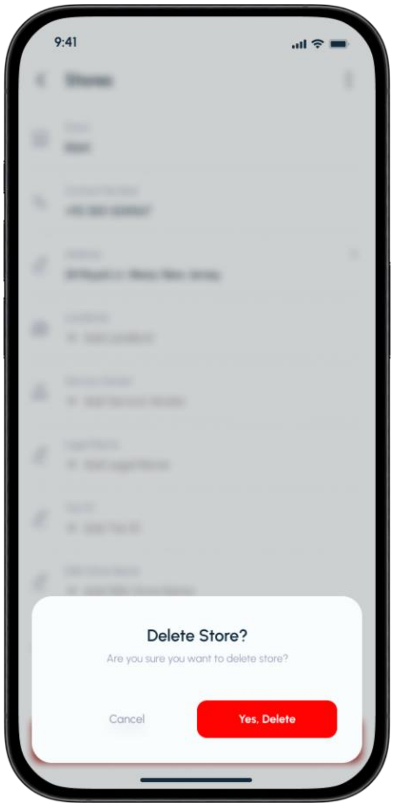


Deleting a Store

- To delete a store, select the store and tap **Delete** at the bottom of the screen.
- Confirm by tapping **Yes, Delete**.

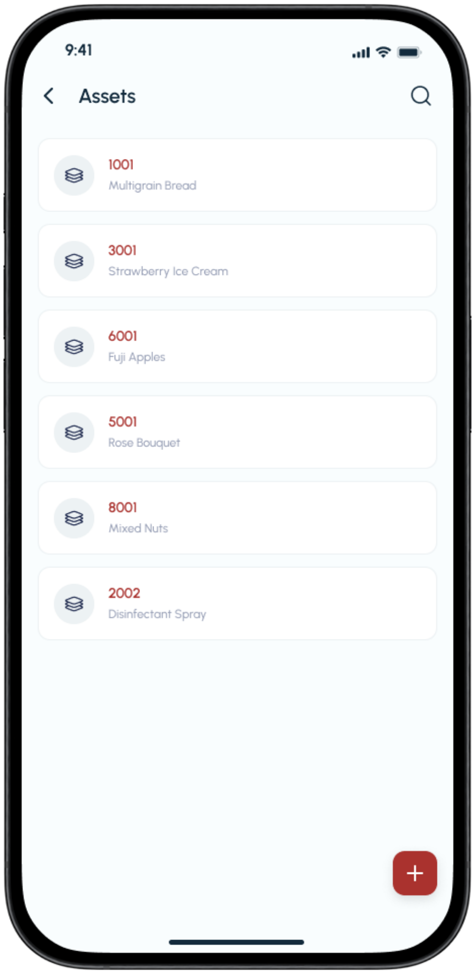


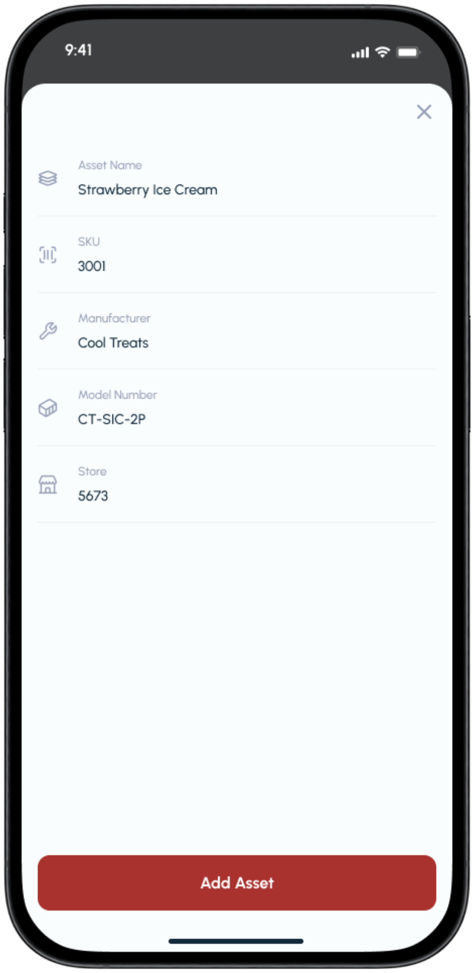




Managing Assets

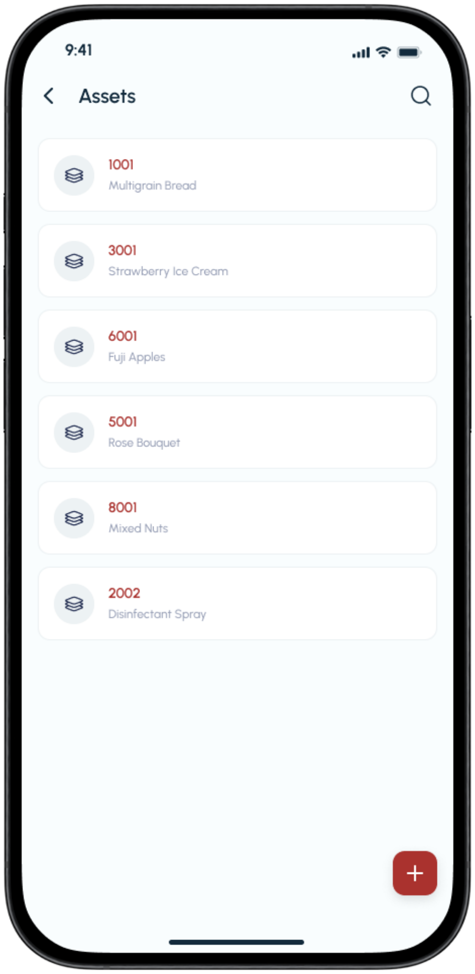
- Adding a New Asset
- From the **Assets** screen, tap the **+ (plus)** button to add a new asset.
- Fill in the required fields:
  - **Asset Name**: Enter the asset's name.
  - **Asset Number**: Provide a unique asset number.
  - **Assigned Store**: Select the store to which the asset is assigned.
- Tap **Add Asset** to save the new asset.

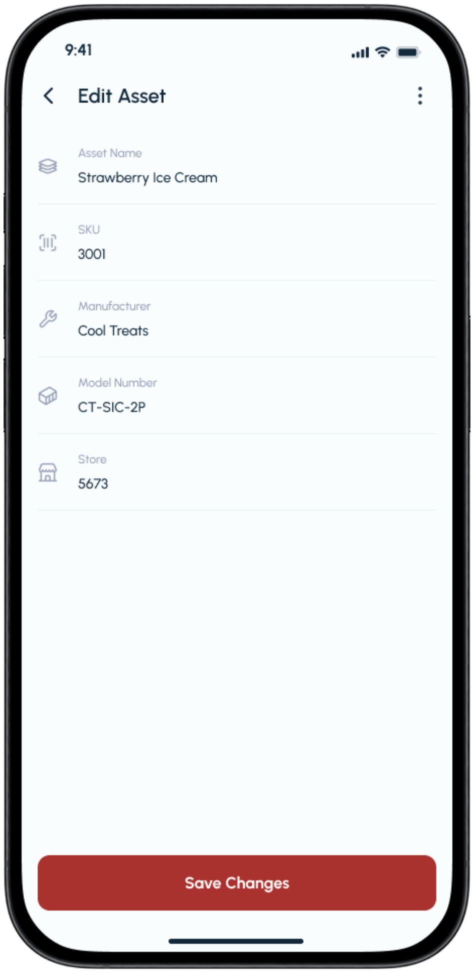




Editing an Asset

- Select the asset you wish to edit.
- Update the asset details as needed.
- Tap **Save Changes** to apply the updates.





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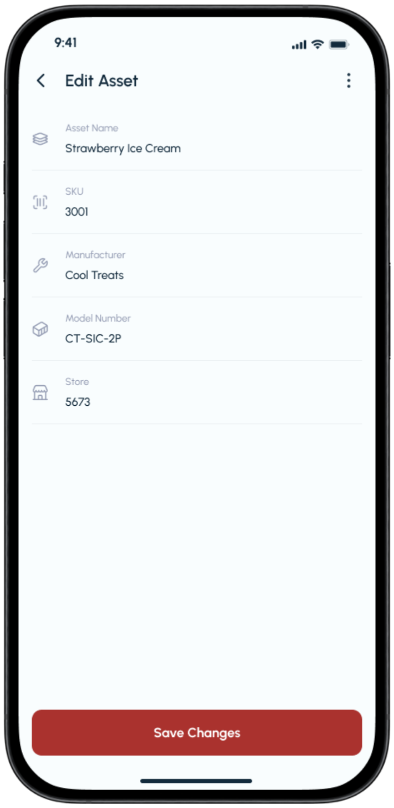
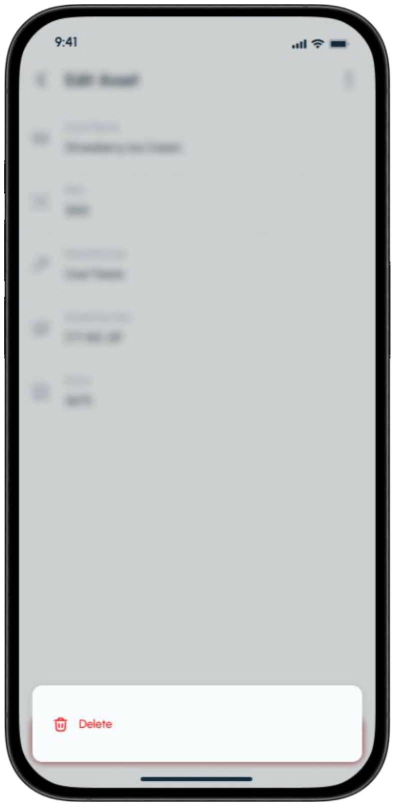
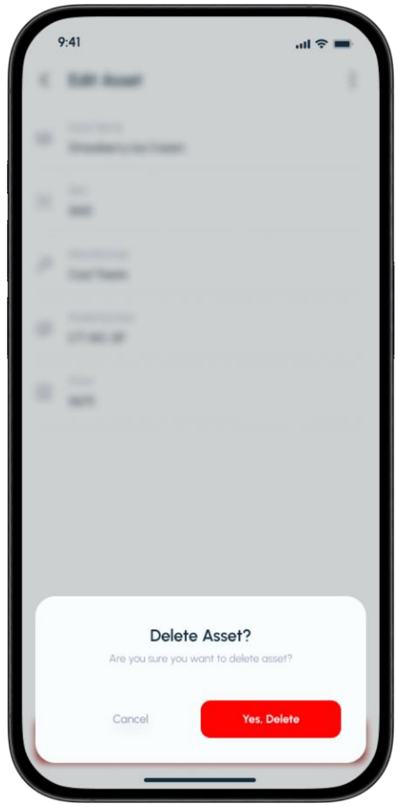
Deleting an Asset

- To remove an asset, select the asset and tap **Delete**.
- Confirm by tapping **Yes, Delete**.

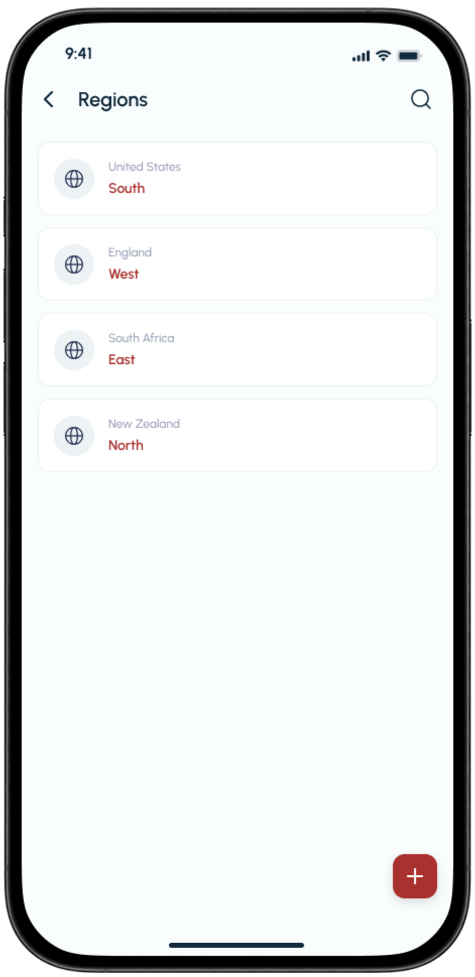


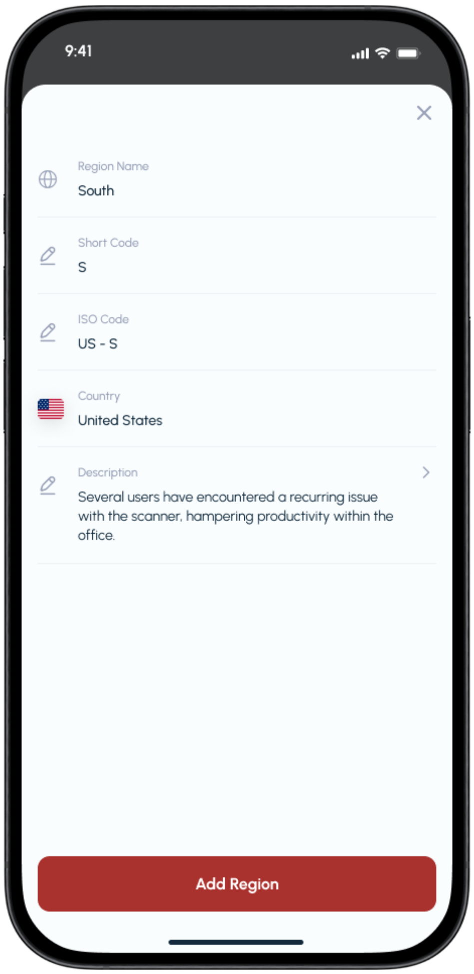




Managing Regions

- Adding a New Region
- Tap the **+ (plus)** button from the **Regions** screen to create a new region.
- Enter the following details:
    - **Region Name**: Name of the region.
    - **Region Code**: Code for easy identification.
    - **Address**: Physical address of the region.
    - **Liability**: Specify the liability for the region.
- Tap **Add Region** to save.





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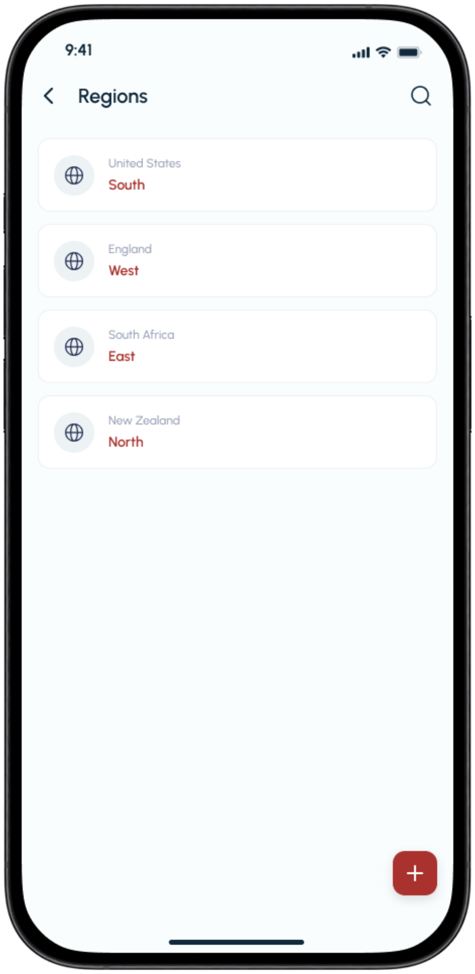
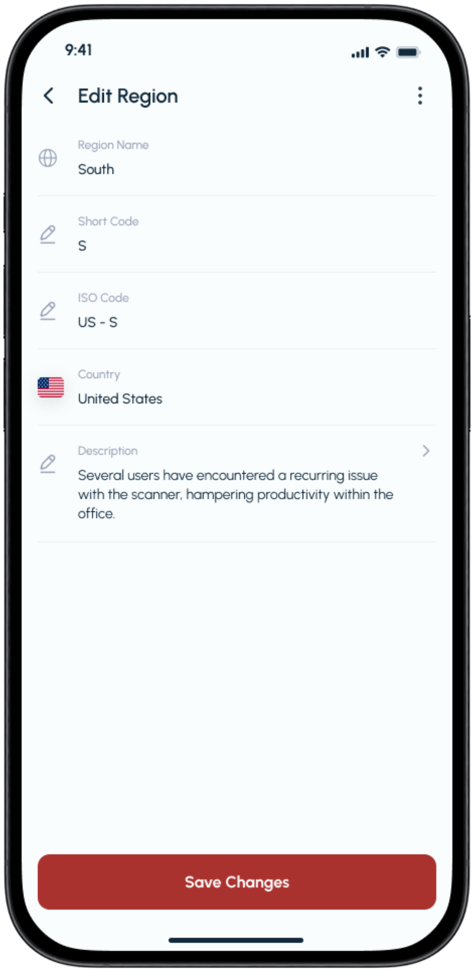
Editing a Region

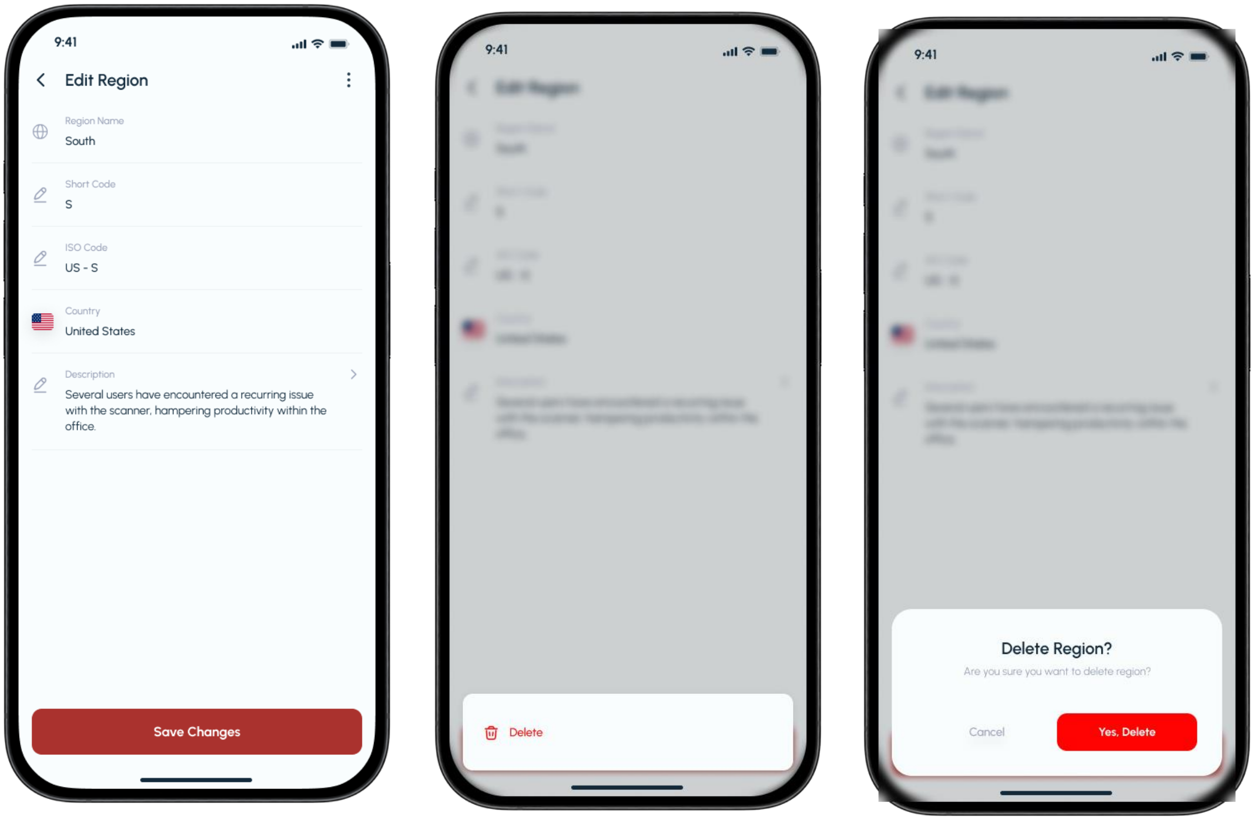
- Select the region you want to modify.
- Update the details like region name, code, or liability.
- Tap **Save Changes**.





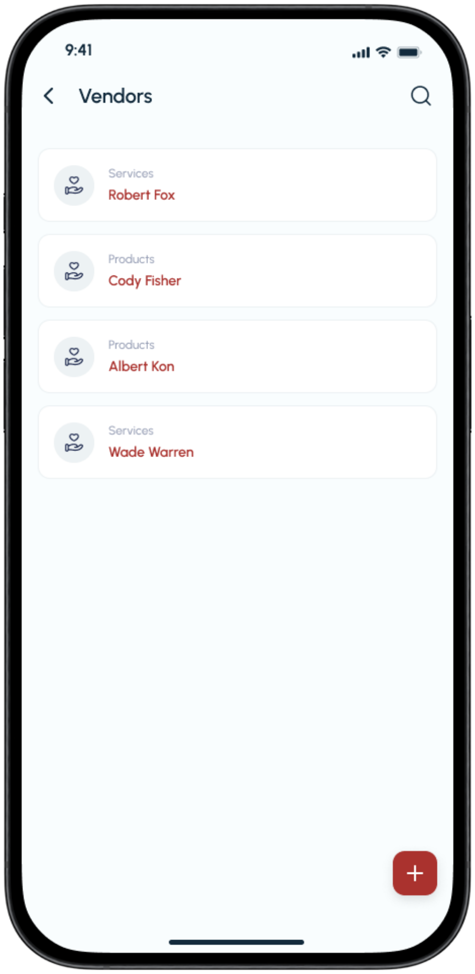
Deleting a Region

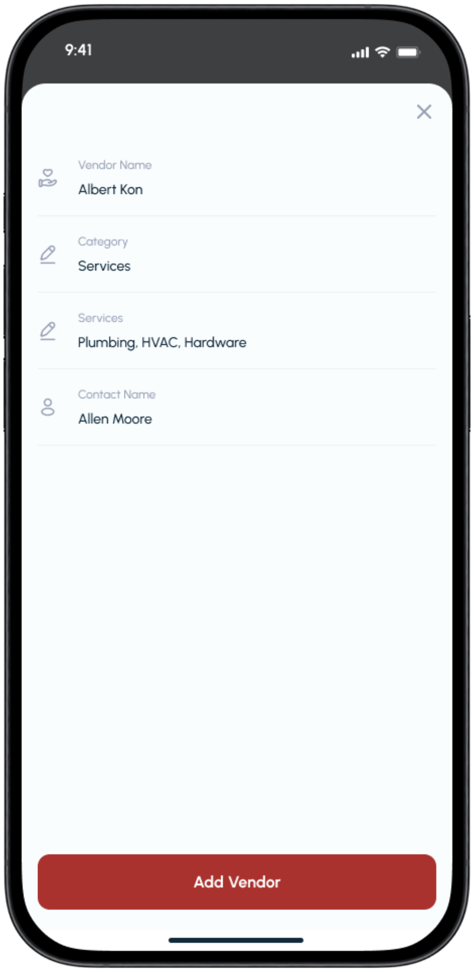
- To delete a region, tap on the region, then tap **Delete**.
- Confirm by tapping **Yes, Delete**.



Managing Vendors

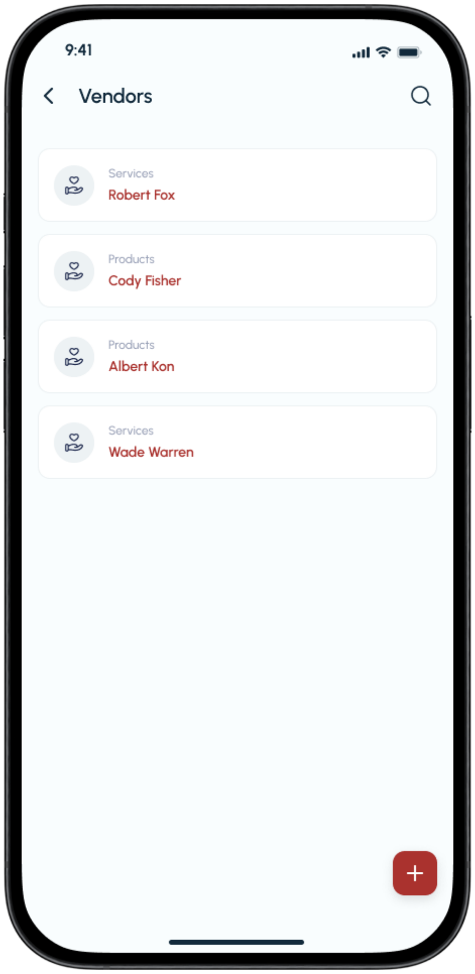
- Adding a New Vendor
- Tap the **+ (plus)** button from the **Vendors** screen to create a new vendor.
- Enter the following information:
  - **Vendor Name**: The name of the vendor.
  - **Category**: Specify the service/product category.
  - **Add Services**: Select the services the vendor provides (e.g., HVAC, Electrical).
- Tap **Add Vendor** to save the new vendor.

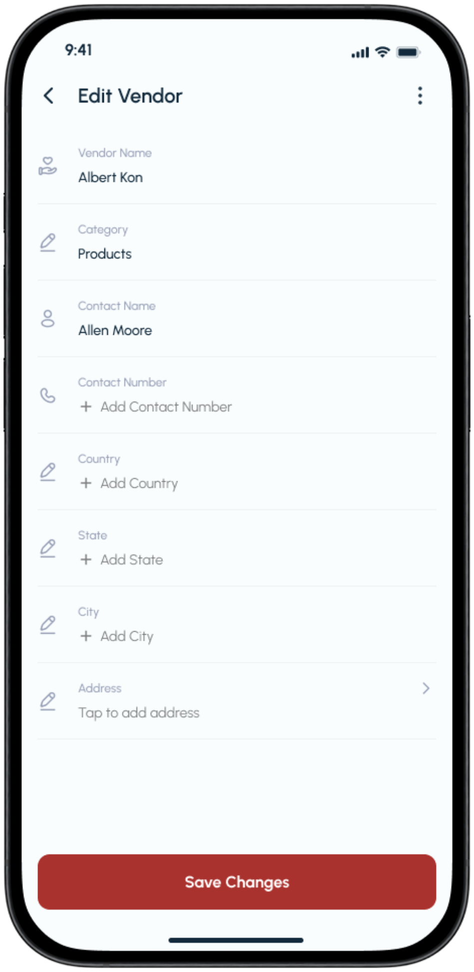




Editing a Vendor

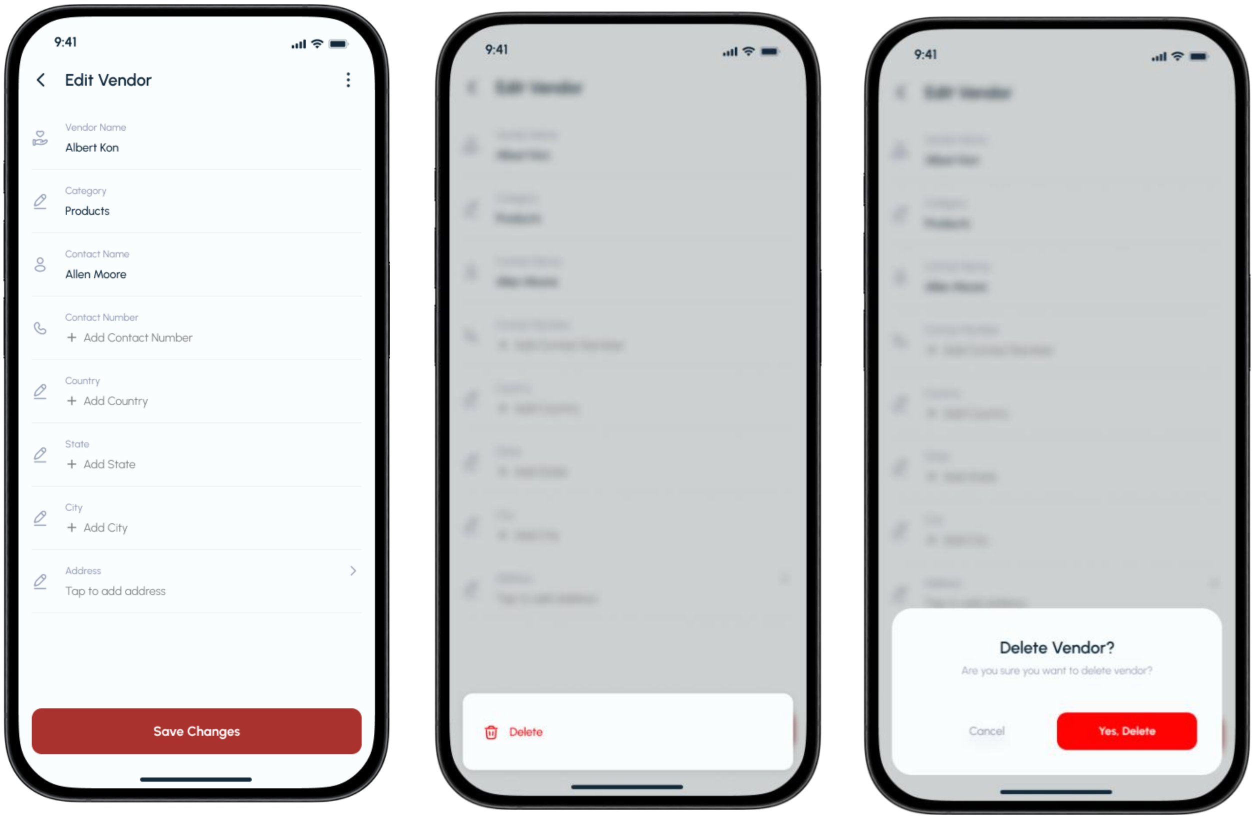
- Select the vendor you wish to edit.
- Update vendor details as needed.
- Tap **Save Changes** to confirm.





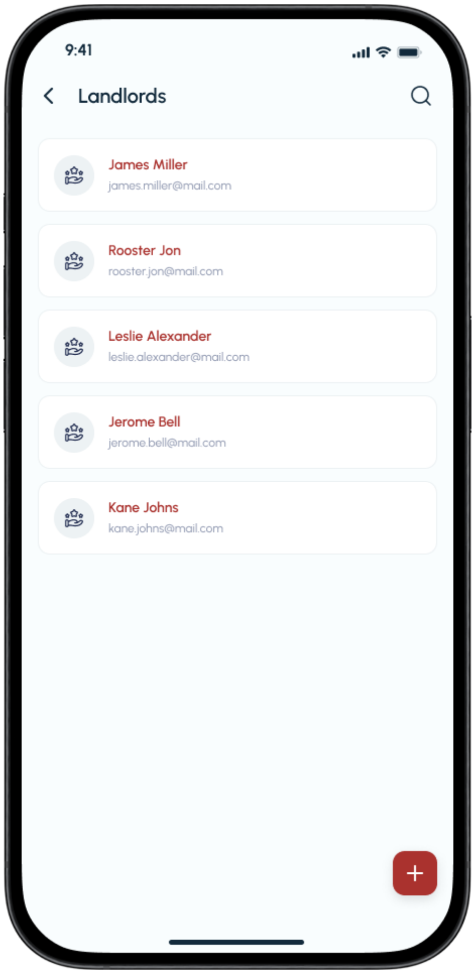
Deleting a Vendor

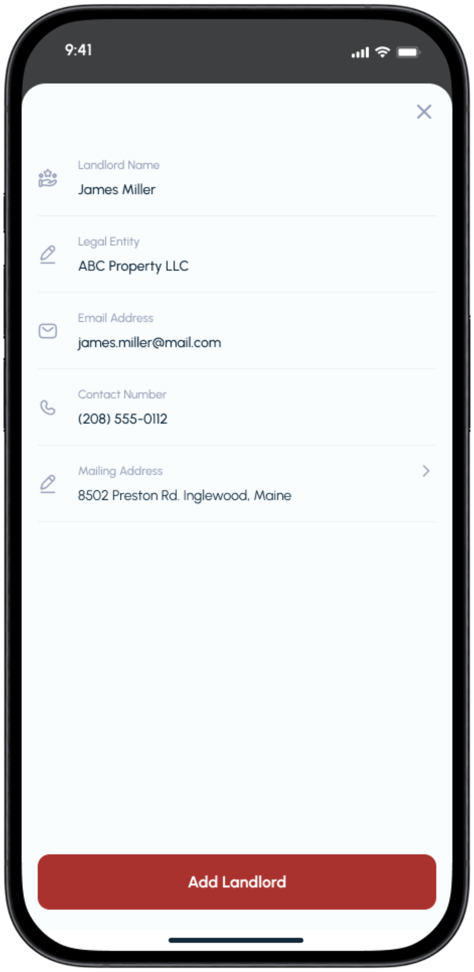
- Select the vendor and tap **Delete**.
- Confirm by tapping **Yes, Delete**.



Managing Landlords

- Adding a New Landlord
- From the **Landlords** screen, tap the **+ (plus)** button to add a new landlord.
- Enter the following details:
  - **Landlord Name**: The name of the landlord.
  - **Contact**: The landlord's contact details (email, phone).
  - **Assigned Property**: Assign the landlord to a property.
- Tap **Add Landlord** to save.





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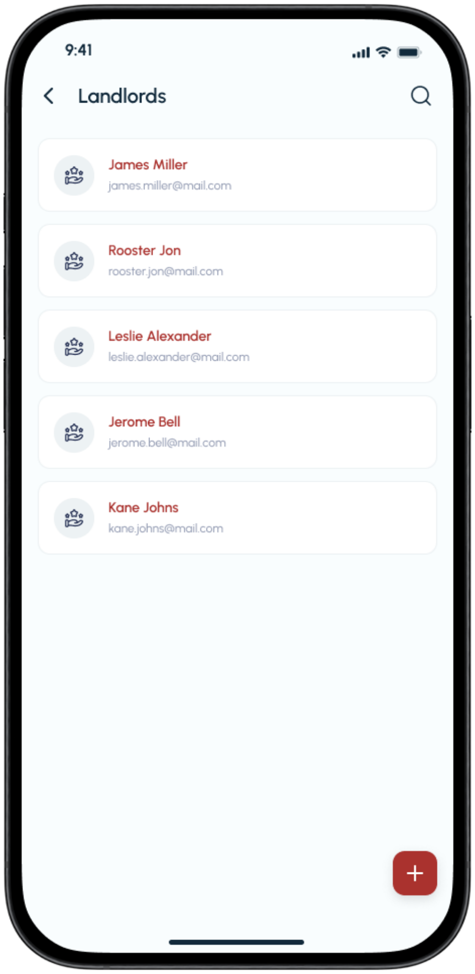
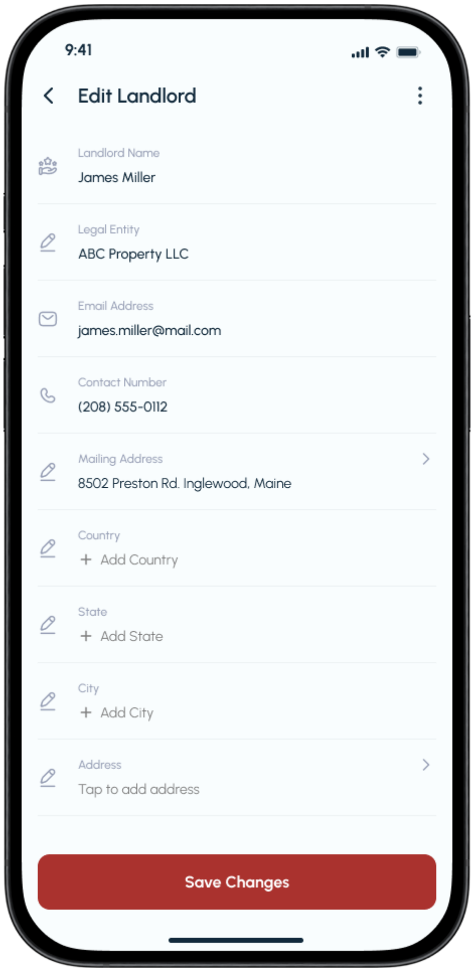
Editing a landlord

- Select the landlord you want to edit.
- Update the necessary details and tap **Save Changes**.





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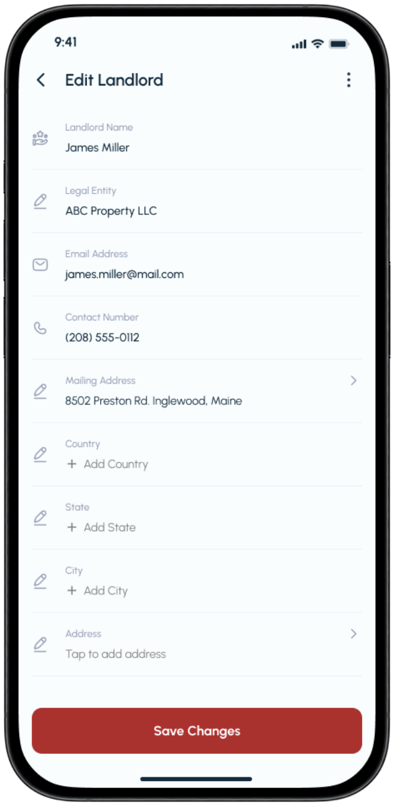
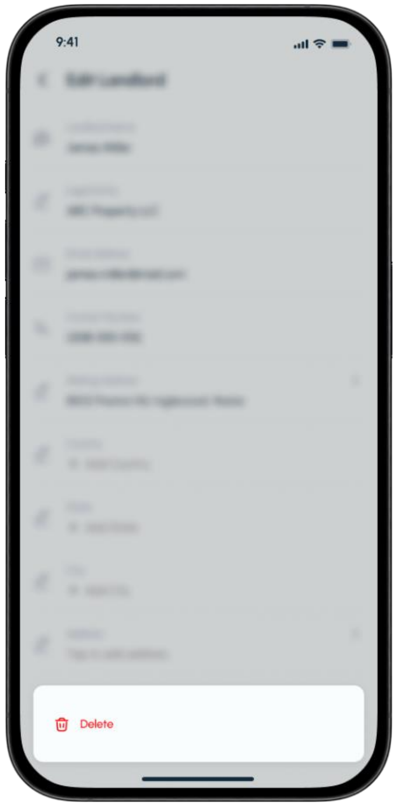
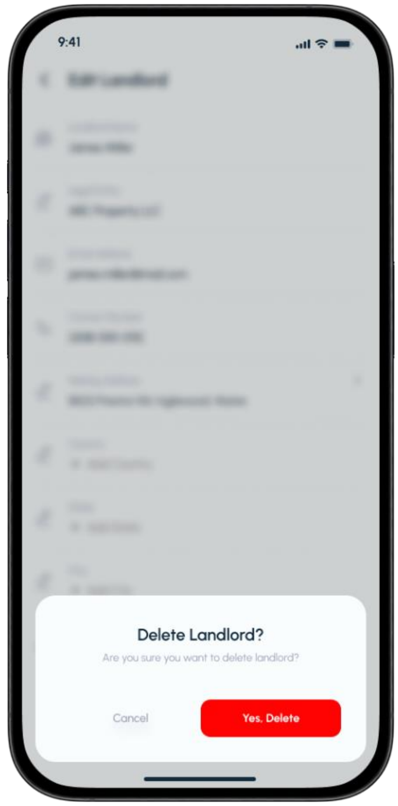
Deleting a landlord

- Select the landlord and tap **Delete**.
- Confirm by tapping **Yes, Delete**.

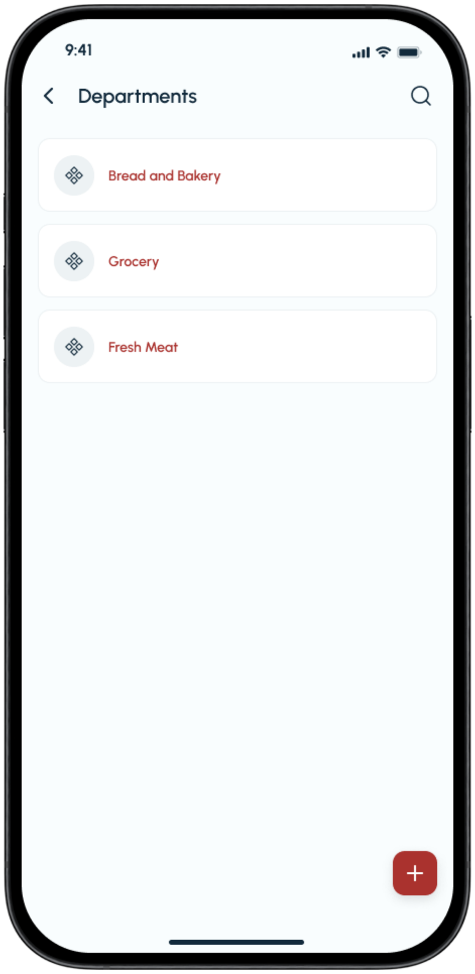


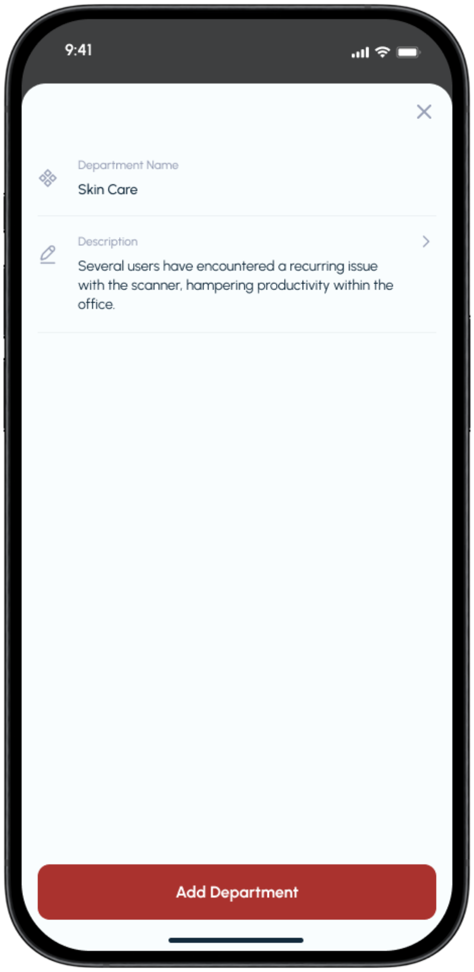




Managing Departments

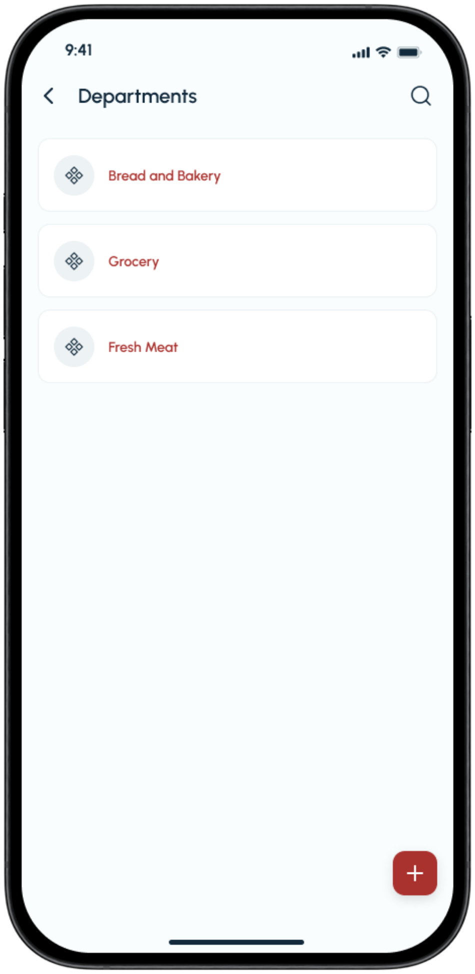
- Adding a New Department
- From the **Departments** screen, tap the **+ (plus)** button to create a new department.
- Enter the **Department Name** and any relevant details.
- Tap **Add Department** to save.

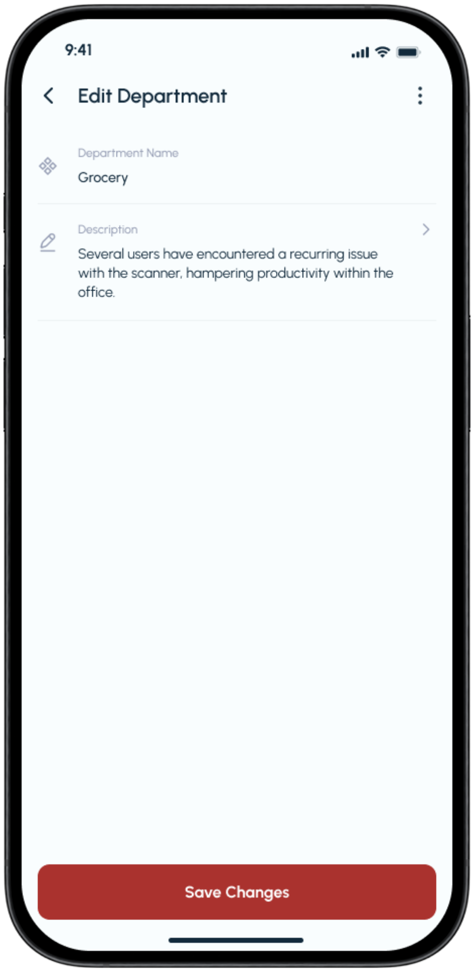




Editing a department

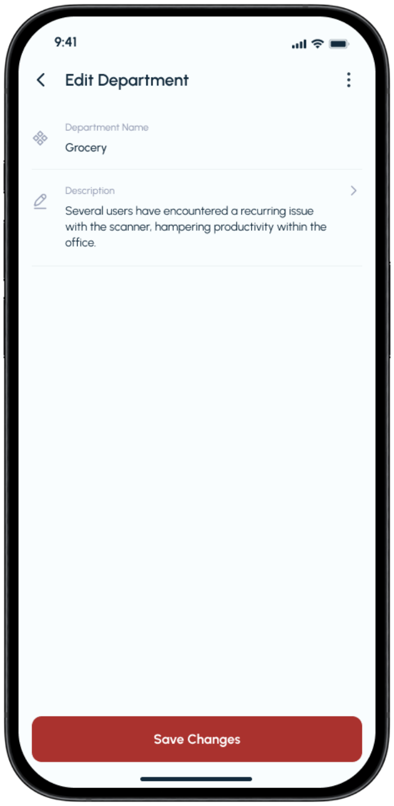
- Select the department you wish to edit.
- Update the department details and tap **Save Changes**.

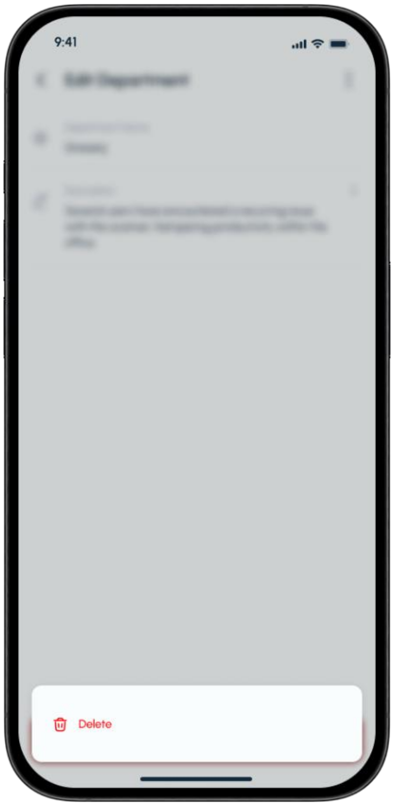


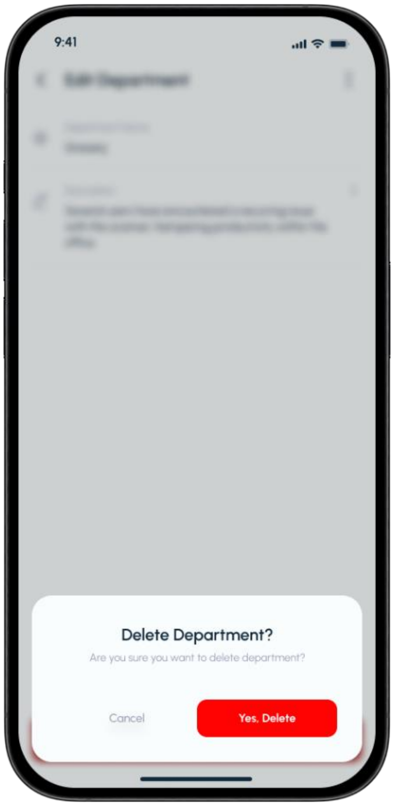


Deleting a department

- Select the department and tap **Delete**.
- Confirm by tapping **Yes, Delete**.

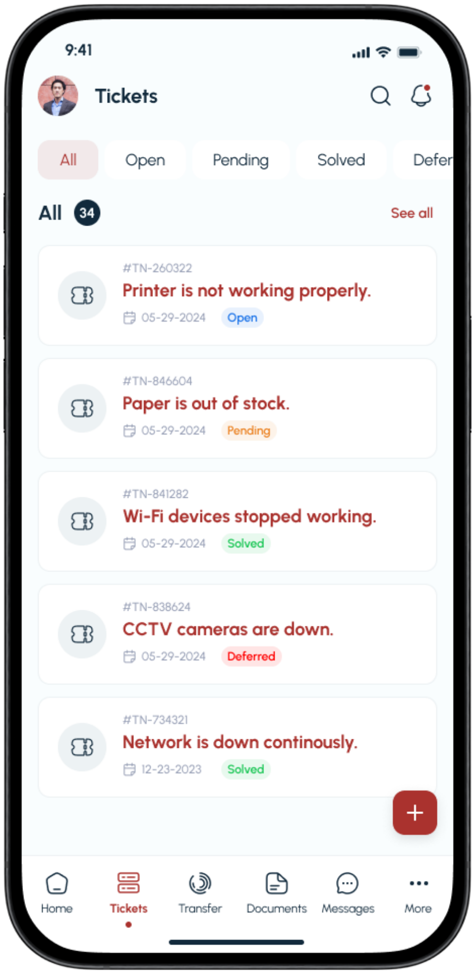


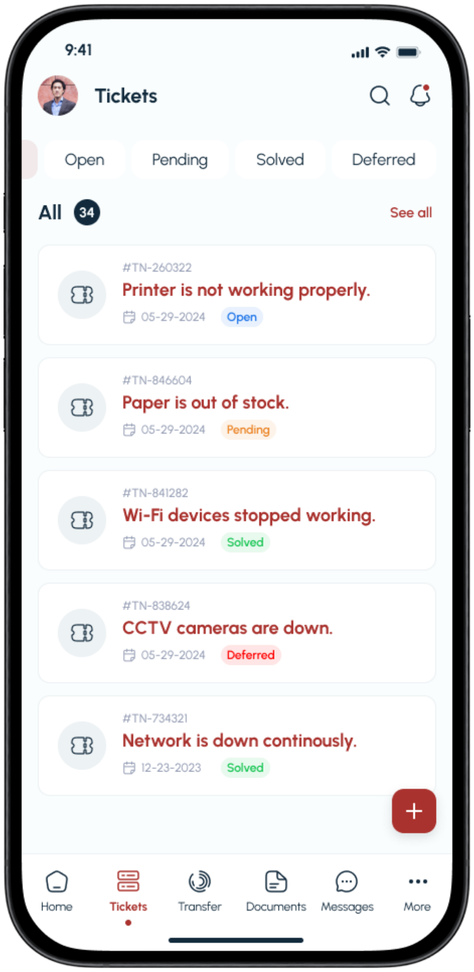




Tickets

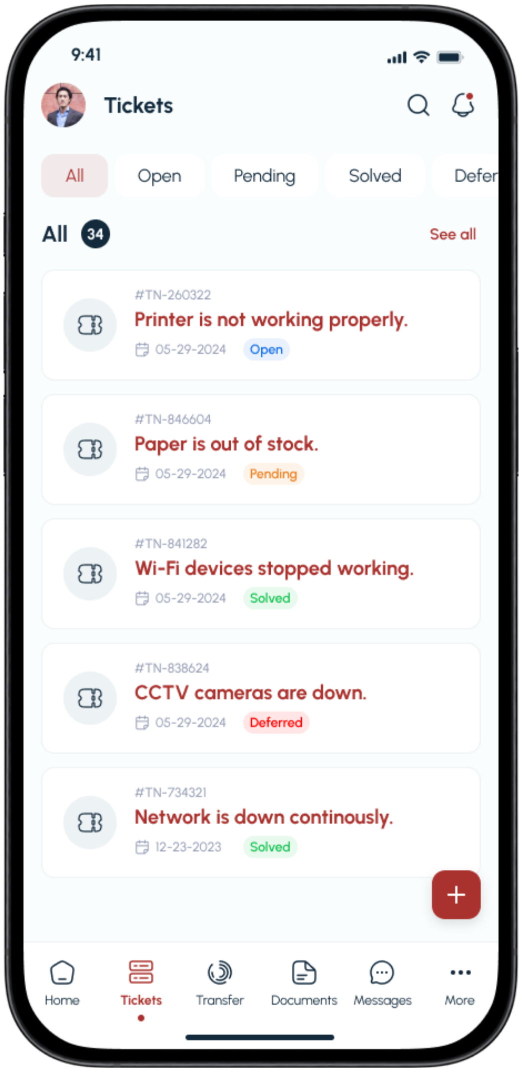
- **Navigate to the Tickets Tab** by tapping the **Tickets** icon in the bottom navigation bar.
- You will see five ticket categories:
  - **All:** All tickets.
  - **Open**: Active tickets that need to be resolved.
  - **Pending**: Tickets awaiting updates or action.
  - **Solved**: Completed tickets.
  - **Deferred**: Tickets that have been postponed for future resolution.





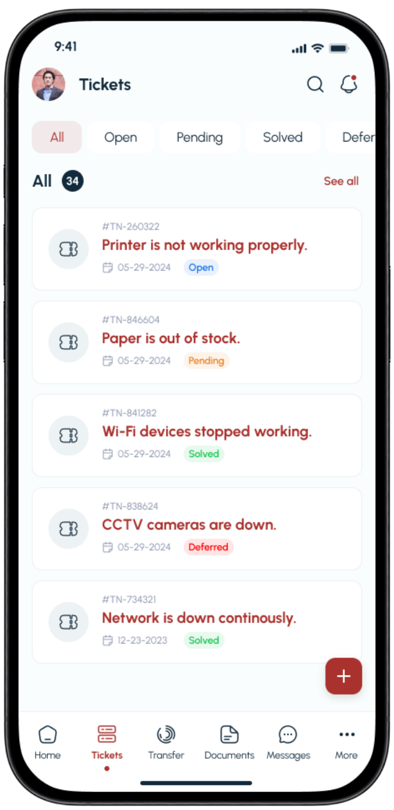
View All Tickets

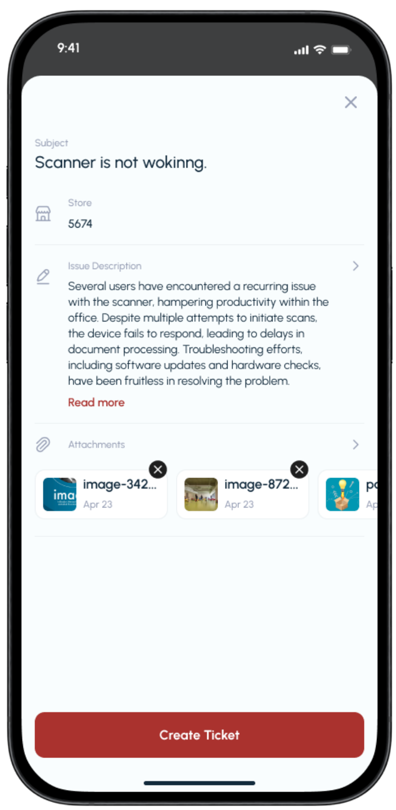
- The **All-Tickets** section provides an overview of all tickets regardless of their status.
- Each ticket is listed with:
  - A unique **ticket number** (e.g., #TN-260322).
  - A **subject** summarizing the issue (e.g., "Printer is not working properly").
  - The **date** the ticket was created.
  - The **status** of the ticket (Open, Pending, Solved, or Deferred).



Create a New Ticket

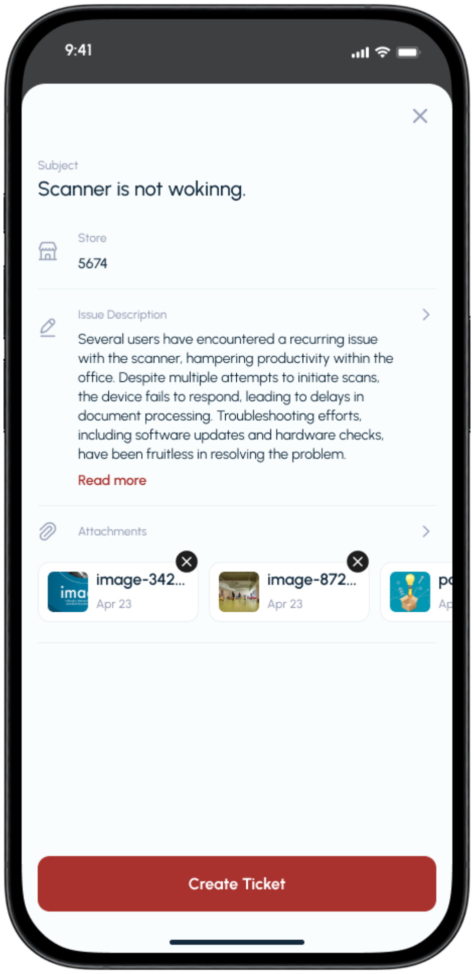
- In the Tickets screen, tap the **+ (plus)** icon in the bottom-right corner to create a new ticket.
    - Subject:
        - Tap on the **"Tap to add subject"** field.
        - Enter a brief but clear title for the ticket (e.g., "Scanner is not working").
    - Store:
        - Tap **"Select Store"** to choose the relevant store or location. Select the store from the list (e.g., Store #7421).
    - Description:
        - Tap **"Tap to add issue description"** to provide more detailed information about the problem.
        - Write a description that helps clarify the issue (e.g., "The scanner is not functioning properly, and multiple attempts to troubleshoot have failed. The issue needs urgent attention.").
    - Attachments:
        - Tap **"Upload Attachment"** if you want to add files or images to provide additional context.
        - Select **Image**, **PDF**, **Video**, or another file type from your device.
        - After selecting the file, it will be uploaded and displayed below the issue description.

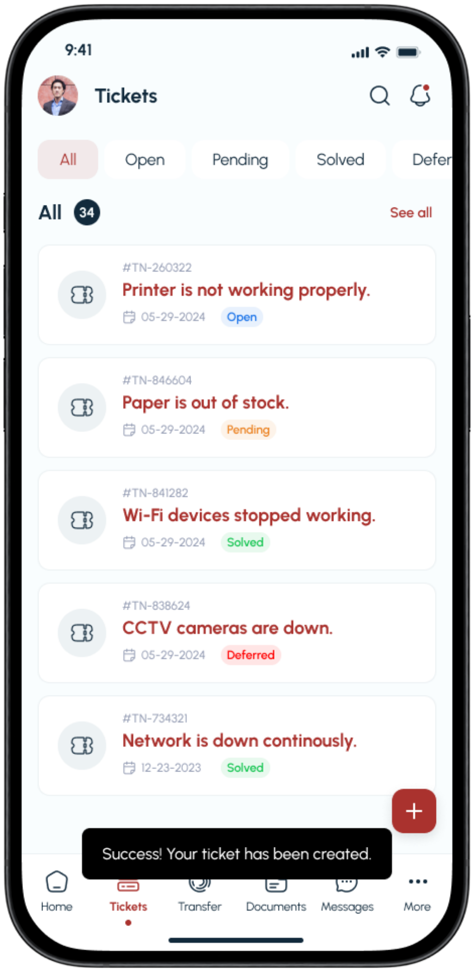




Finalize the Ticket

- After reviewing the ticket details, tap **Create Ticket** at the bottom of the screen.
- Once created, a confirmation message will appear (e.g., "Your ticket has been created successfully").





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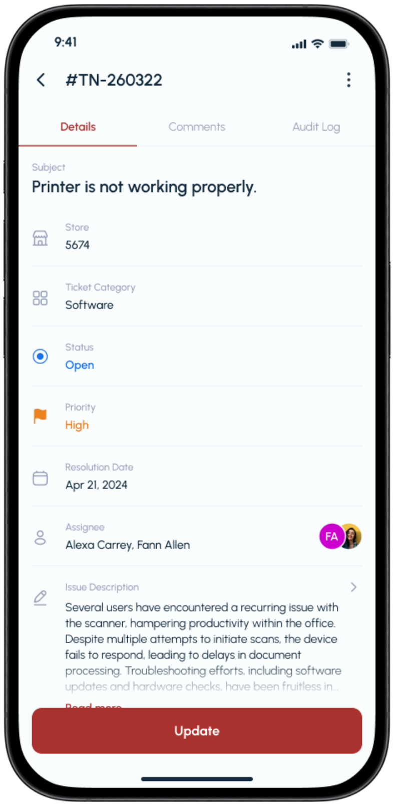
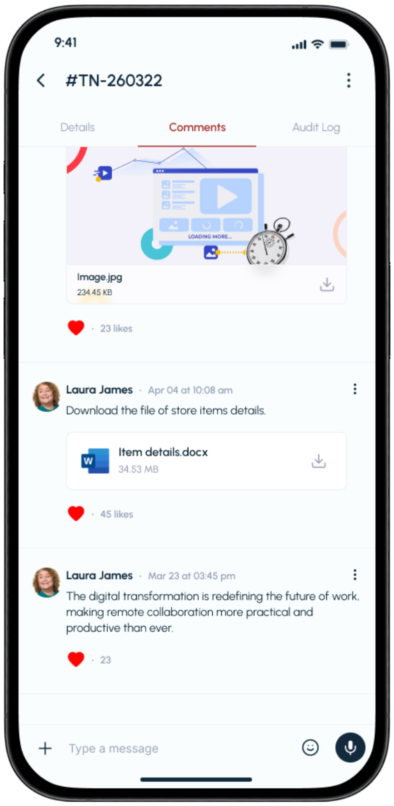
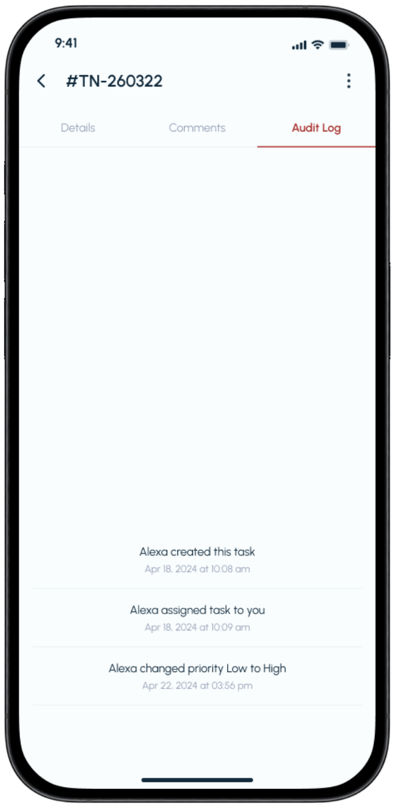
View and Edit an Existing Ticket

- Tap on a ticket to view its **Details**.
- The ticket page is divided into several sections:
  - **Details**: Contains the subject, status, priority, and assignee.
  - **Comments**: Shows any discussions related to the ticket.
  - **Audit Log**: Displays the history of the ticket's updates and changes.

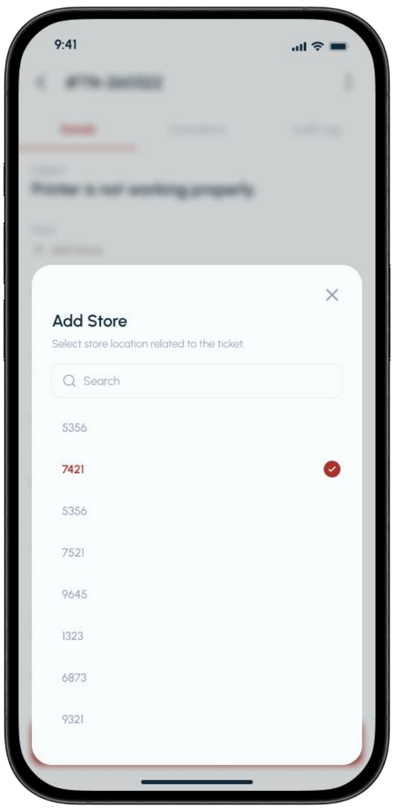


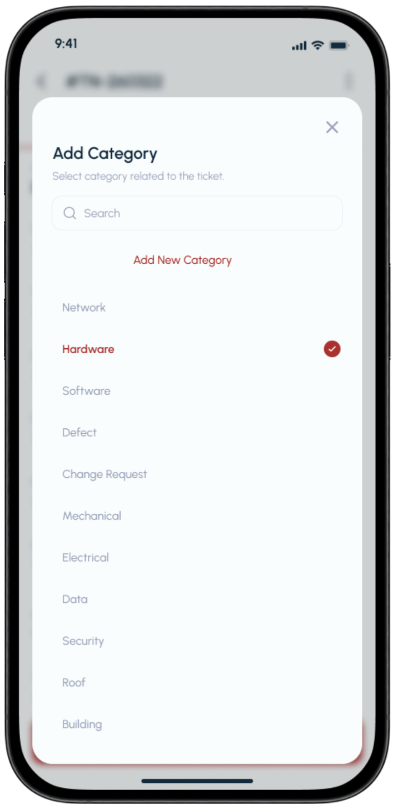


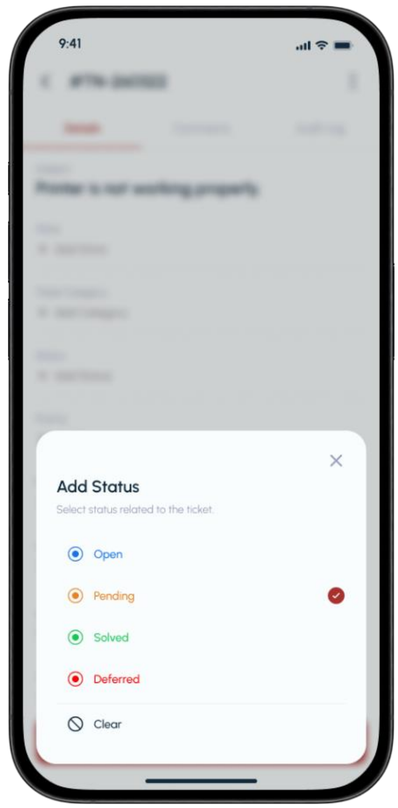


Update Ticket Details

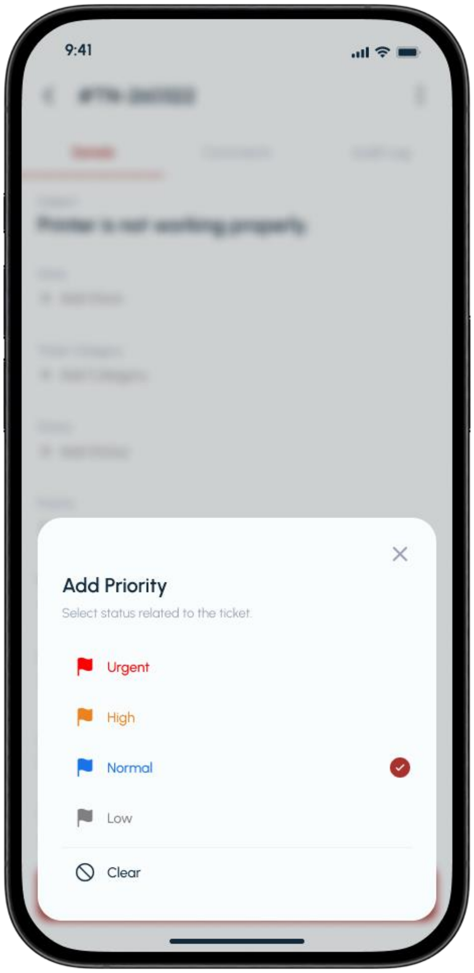
- Add/Update Store:
  - Tap the **Store** field and select the appropriate store location from the list.
- Add/Update Ticket Category:
  - Tap the **Category** field and choose from predefined categories such as Hardware, Software, or Network.
  - You can also add a new category if none of the existing one’s match.
- Change Ticket Status:
  - Tap the **Status** field to change the ticket’s status (Open, Pending, Solved, Deferred).

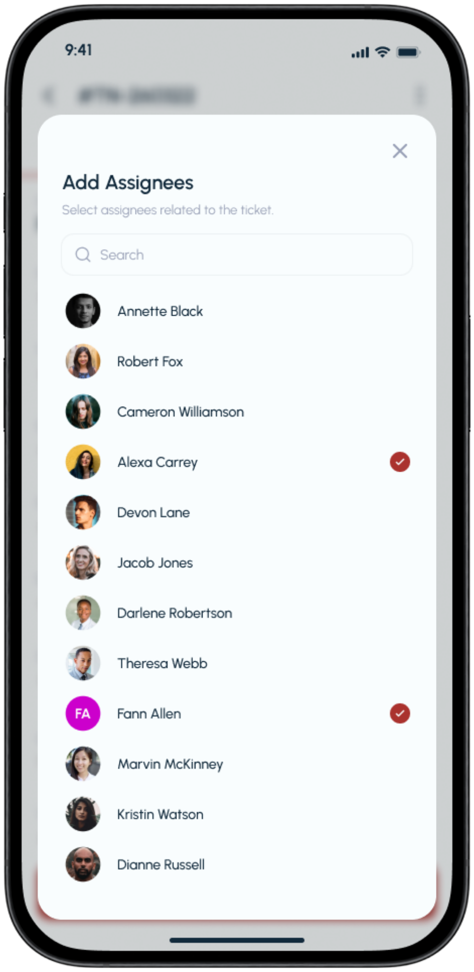






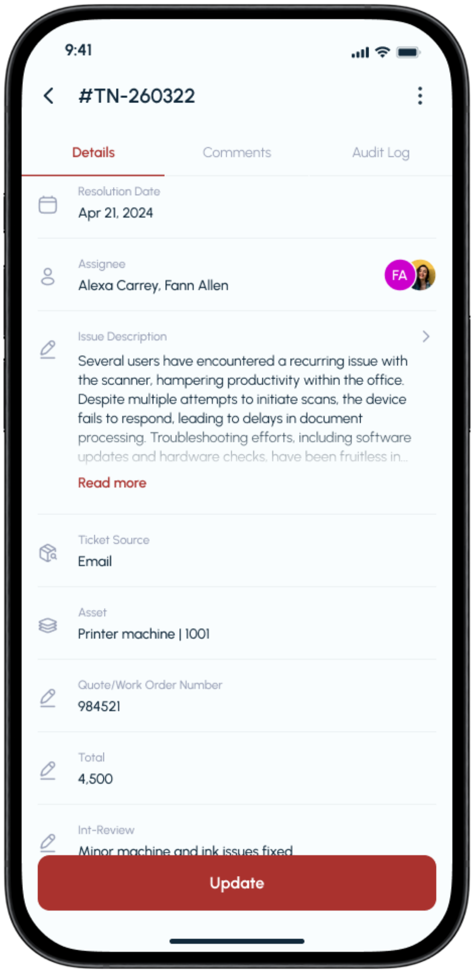
- Set Priority:
  - Tap the **Priority** field to select the urgency of the issue (Urgent, High, Normal, Low).
- Assign or Reassign a Ticket:
  - Tap **Add Assignee** and select the person responsible for handling the issue.
  - Multiple assignees can be added if the task involves more than one person.

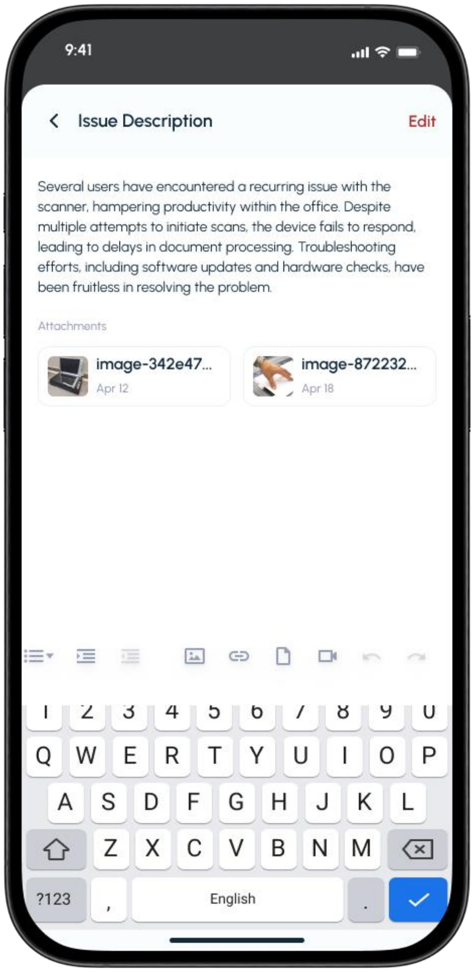




Add an Issue Description and Attach Files

- Tap **Issue Description** to edit or add more details to the ticket.
- Explain the issue in detail to help the assignee understand the problem better.
- You can include technical details, error messages, or the steps taken to resolve the issue.
    - Attach Images or Files:
    - Attach relevant files or images by tapping the **attachment icon**.
    - Uploaded files (e.g., screenshots, logs, or images of equipment) are displayed below the description for easy reference.





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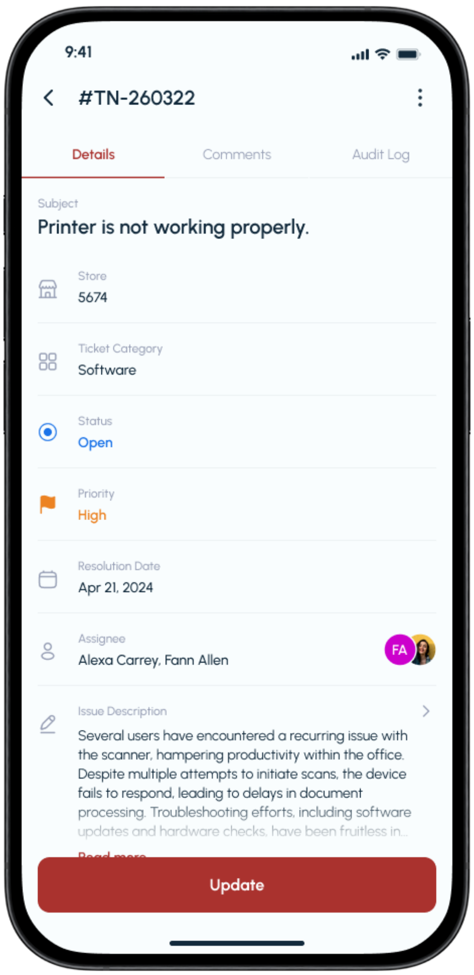
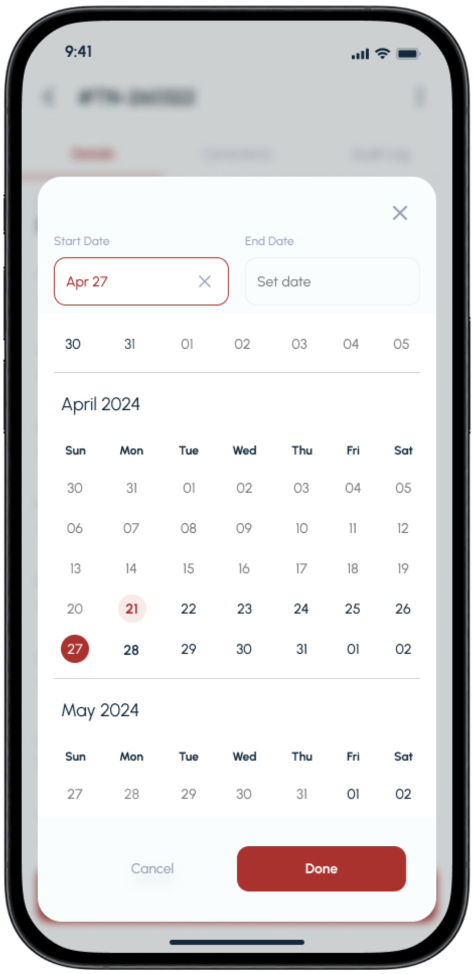
Set a Resolution Date

- Tap **Resolution Date** to select when you expect the issue to be resolved.
- Choose the **Start Date** and **End Date** for the ticket.
- Tap **Done** to save the resolution timeline.





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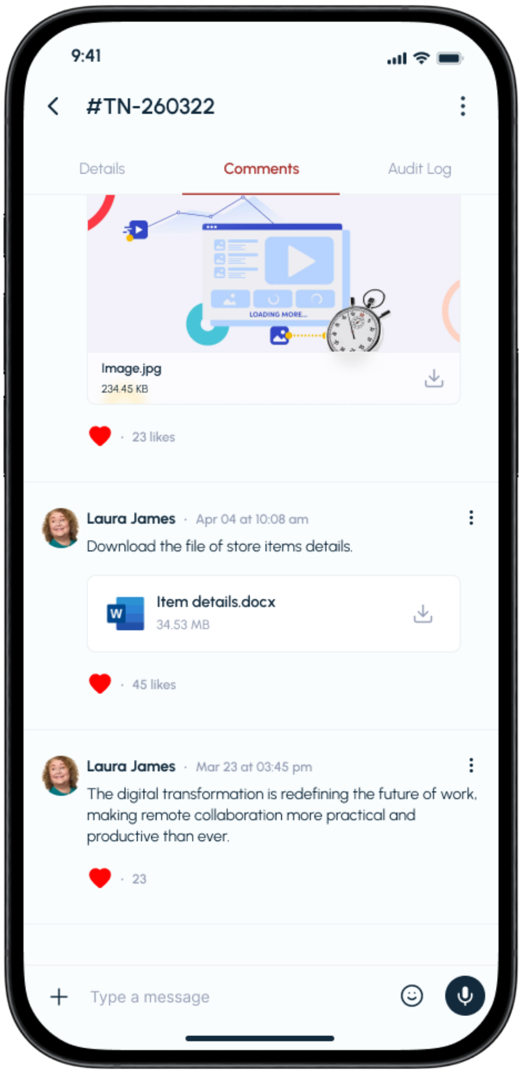
Manage Comments

- Add Comments:
- Tap the **Comments** tab to view the discussion related to the ticket.
- You can add comments, respond to updates, or request clarification from other team members.
    - Attach files or images directly in the comments to provide additional context.
    - Like and Share Comments:
    - Tap the **heart icon** to like a comment or share files attached to the comment for better collaboration.



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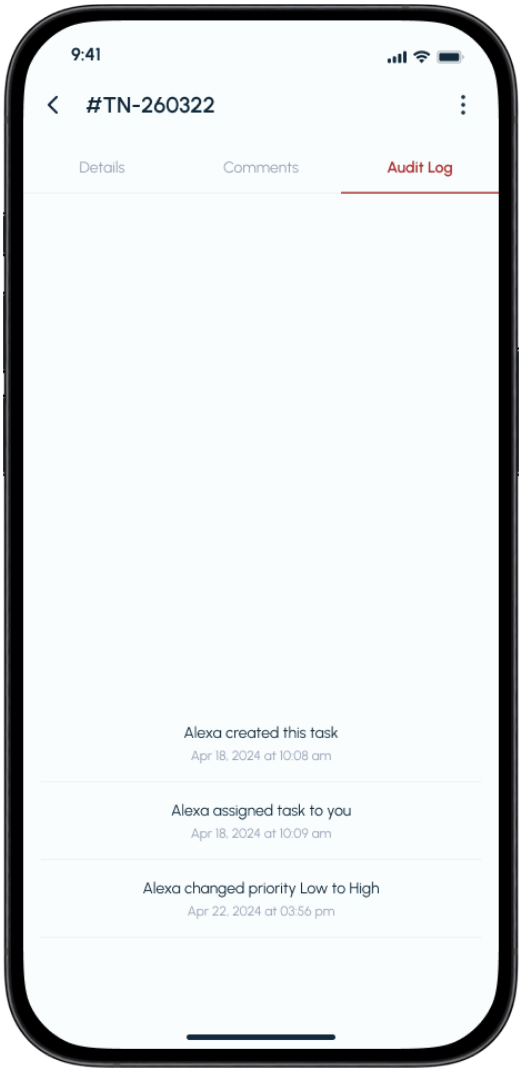
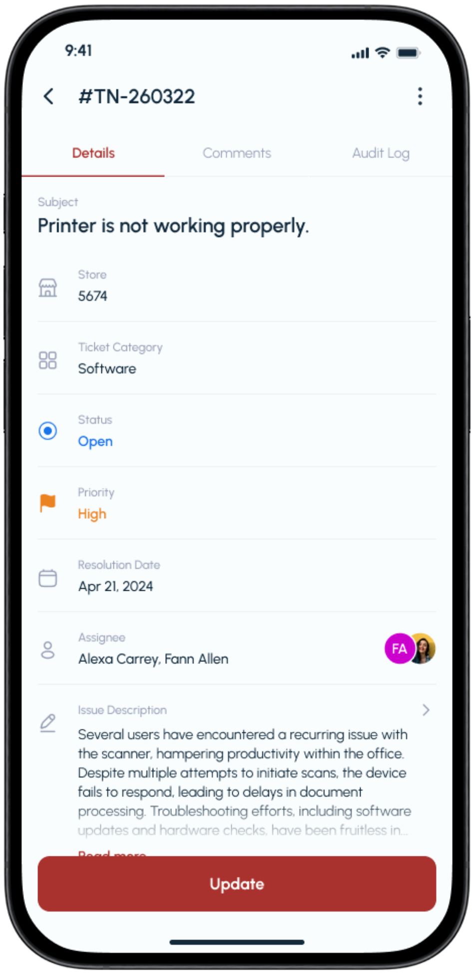
View Audit Logs

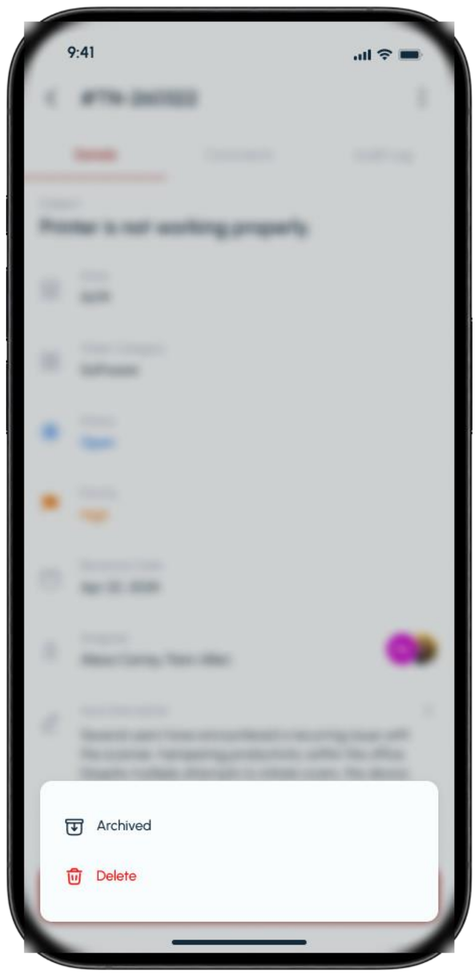
- Tap the **Audit Log** tab to see a history of all the actions taken on the ticket.
- This includes who created the ticket, who assigned it, changes in priority or status, and comments added.
- Use this to track progress and ensure that the ticket is being actively worked on.



Delete or Archive a Ticket

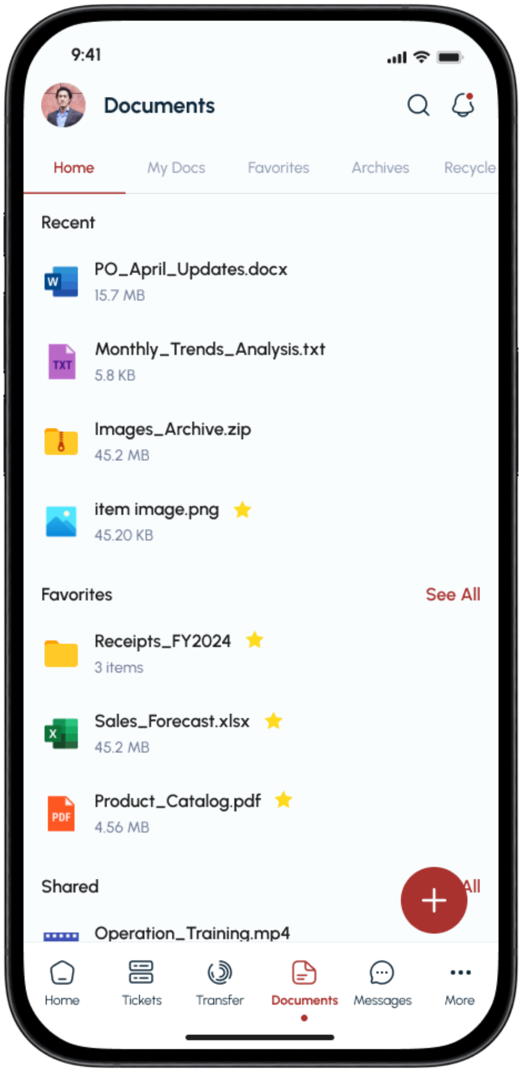
- If a ticket is no longer relevant, you can choose to **delete** or **archive** it.
- Tap the **three-dot menu** on the ticket page and select **Delete** or **Archive**.
    - **Delete**: Permanently removes the ticket from the system.
    - **Archive**: Moves the ticket to the archived list for future reference without actively displaying it in the open ticket queue.





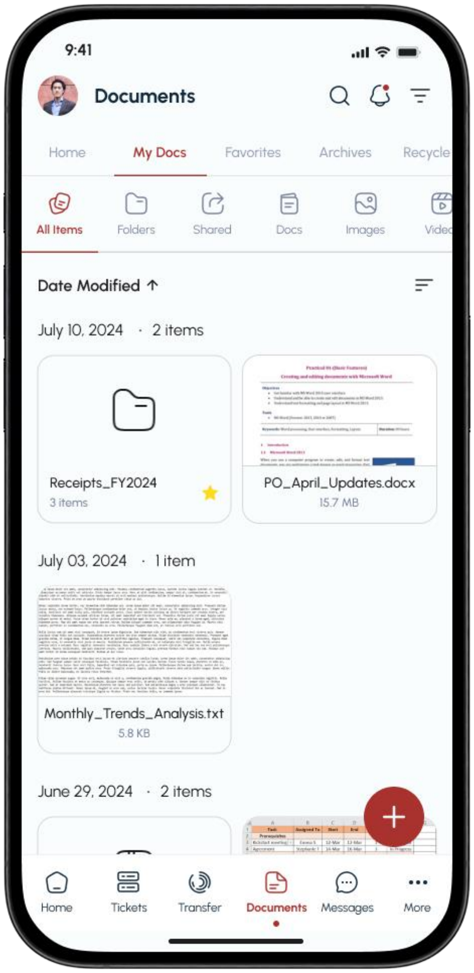
Document Management System

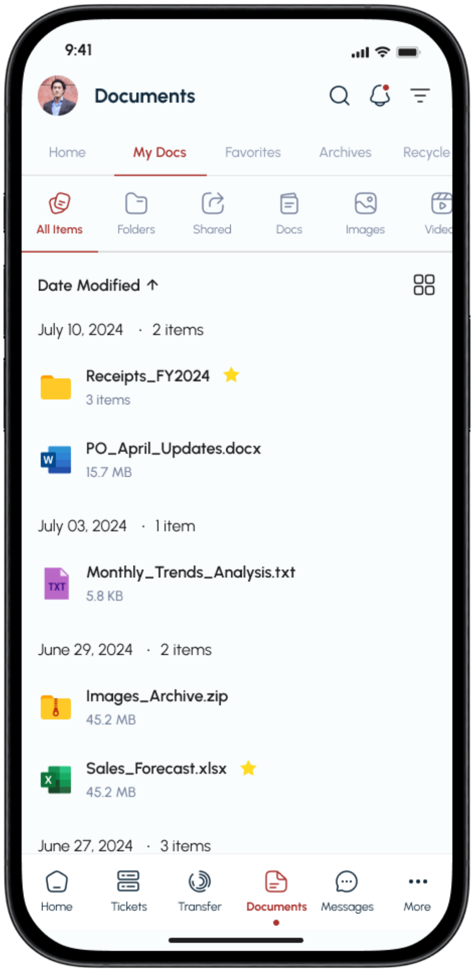
- From the home screen of the LathranSuite app, tap the **Documents** tab in the bottom navigation bar.
- This takes you to the main **Documents Dashboard**, where you can see recent files, favorites, and shared items.



Viewing Files and Folders

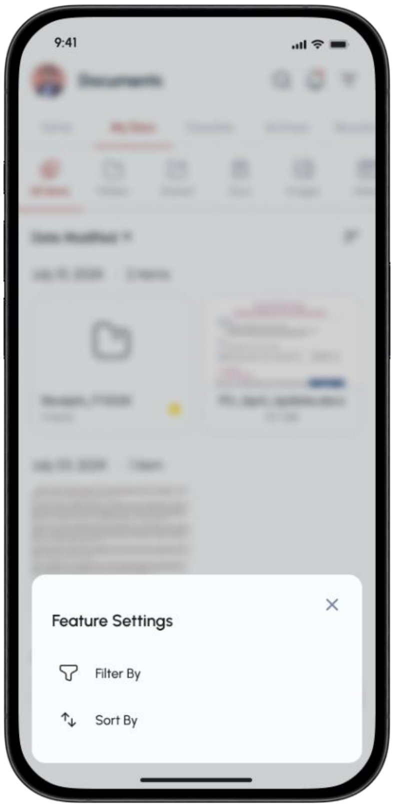
- **Grid View**: The default view is a **Grid View** where you can see thumbnails of each document and folder. You can switch to list view.

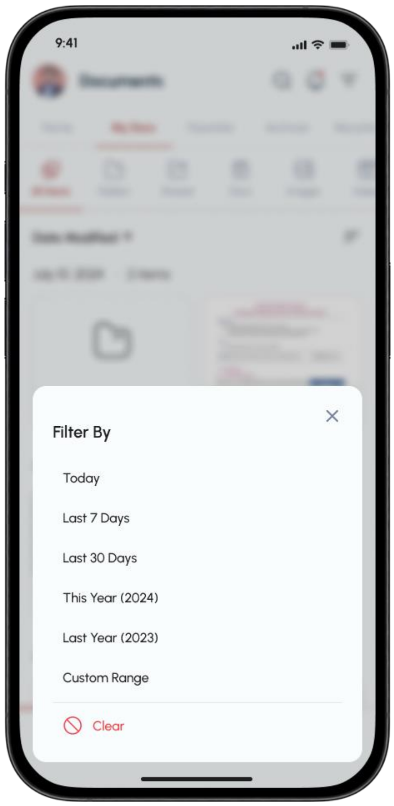


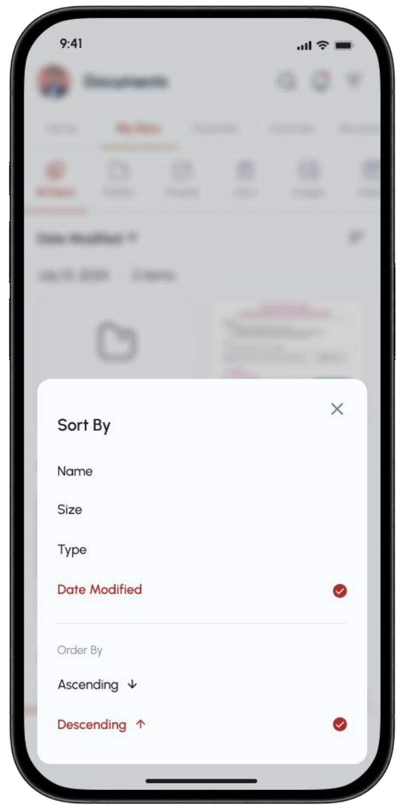


Sorting and Filtering Files

- Tap the **Feature Settings** icon (three dots) in the top-right corner to:
    - **Sort By**: Name, Date Modified, or Type.
    - **Filter By**: Time period (Today, Last 7 Days, Last 30 Days, etc.).
- This helps you quickly find the documents you need.

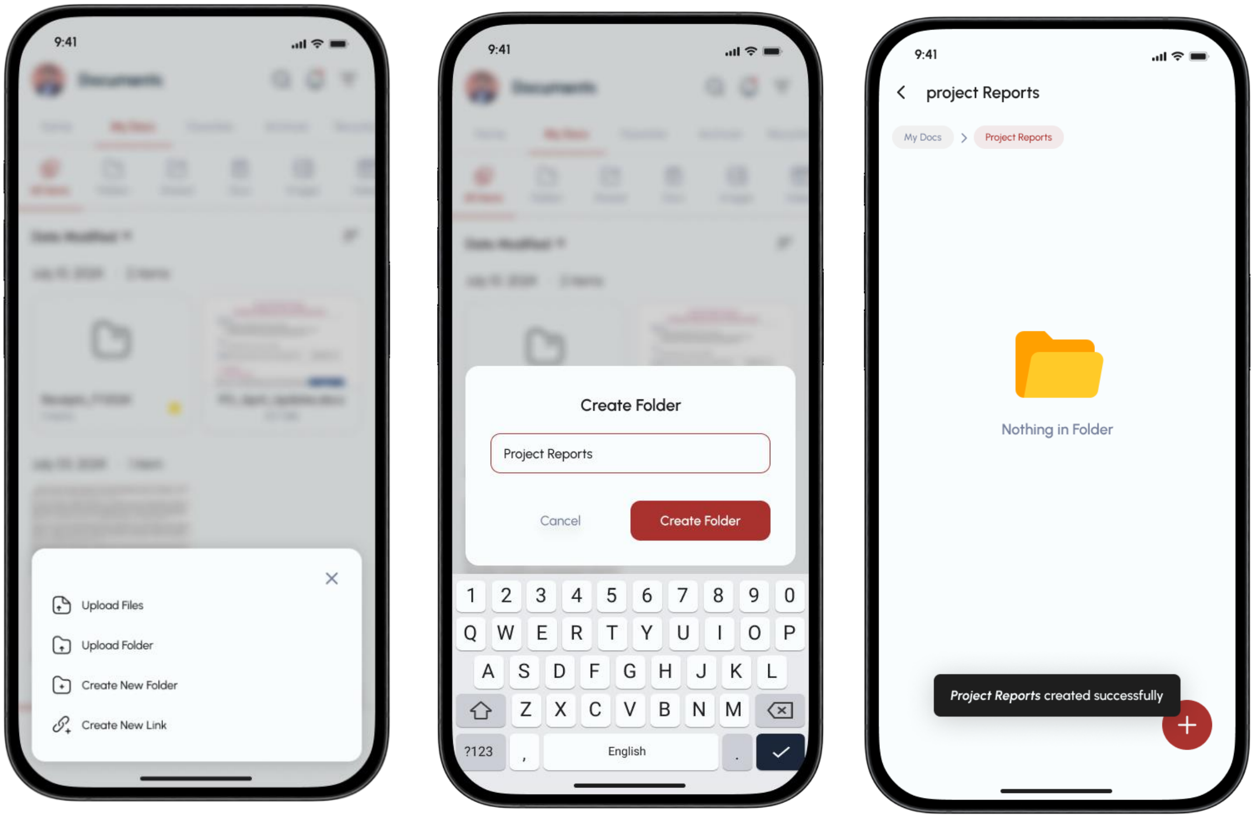






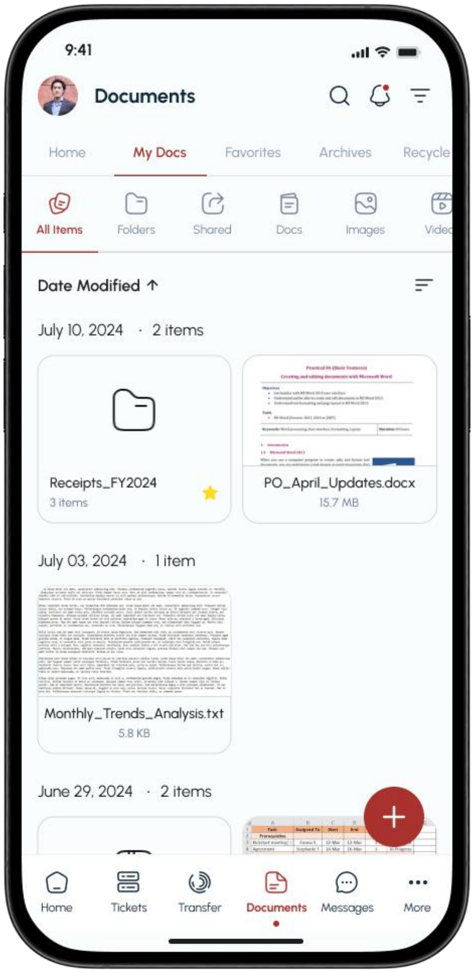
Creating a New Folder

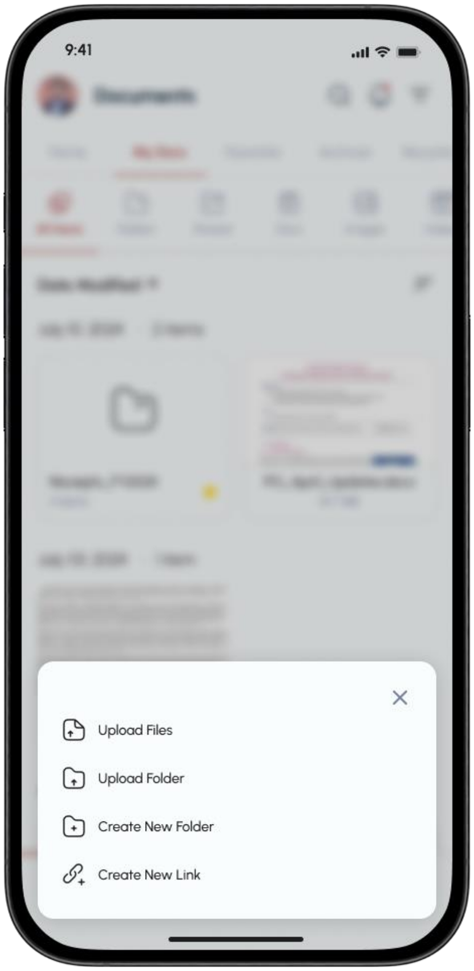
- Tap the **+ (plus)** button in the bottom-right corner.
- Select **Create New Folder** from the pop-up menu.
- Name your folder (e.g., "Project Reports") and tap **Create Folder**.
- You'll see a confirmation message, and the new folder will appear in your document list.



Uploading Files

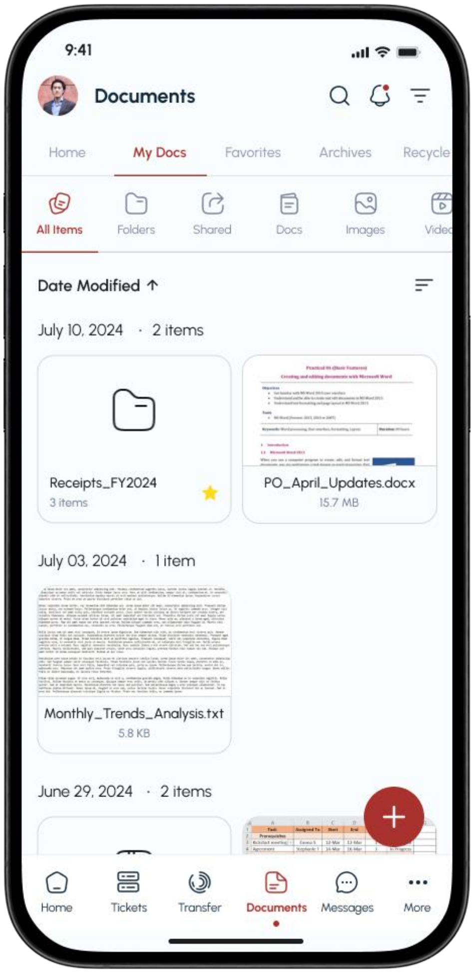
- Tap the **+ (plus)** button.
- Select **Upload File** from the pop-up menu.
- Choose a file from your device to upload.
- The file will be added to the document dashboard under the **Recent Files** section.

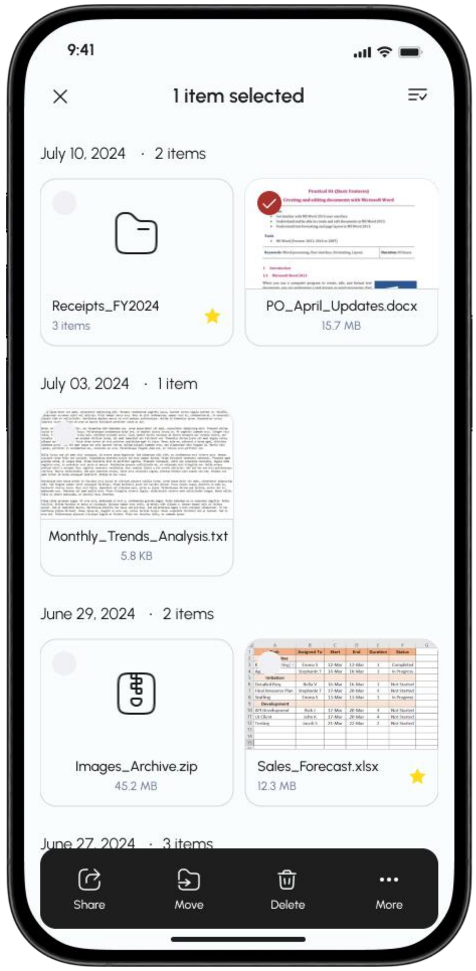




Managing Files and Folders

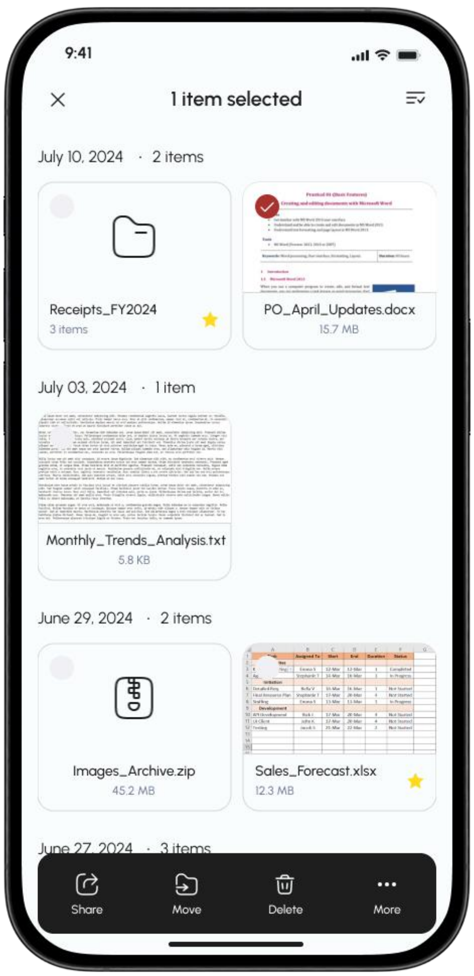
- Select Files:
- Long press on a file or folder to select it.
- You can select multiple items at once for bulk actions.

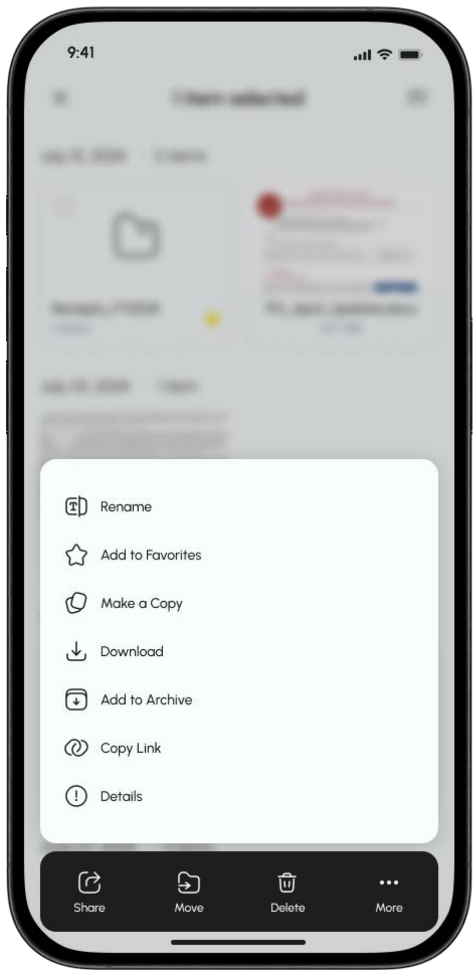




Actions on Files/Folders:

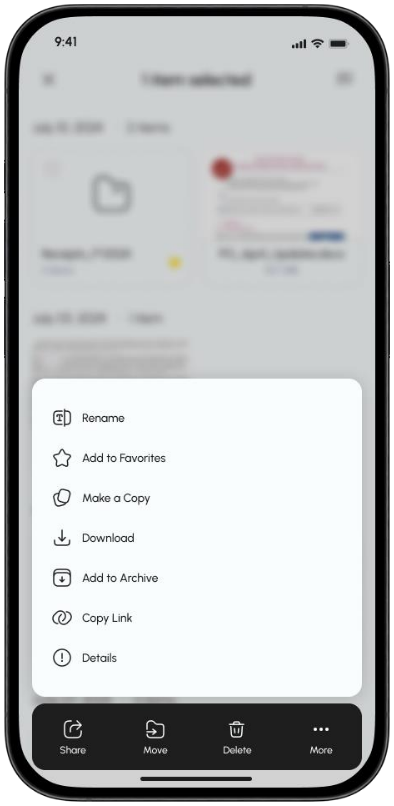
- Tap the **Actions Menu** (three dots) at the bottom of the screen after selecting an item. Available options include:
  - **Move**: Relocate the file to a different folder.
  - **Copy**: Create a duplicate of the file.
  - **Download**: Download the file to your device.
  - **Delete**: Permanently remove the file.
  - **Add to Favorites**: Mark the file for easy access.

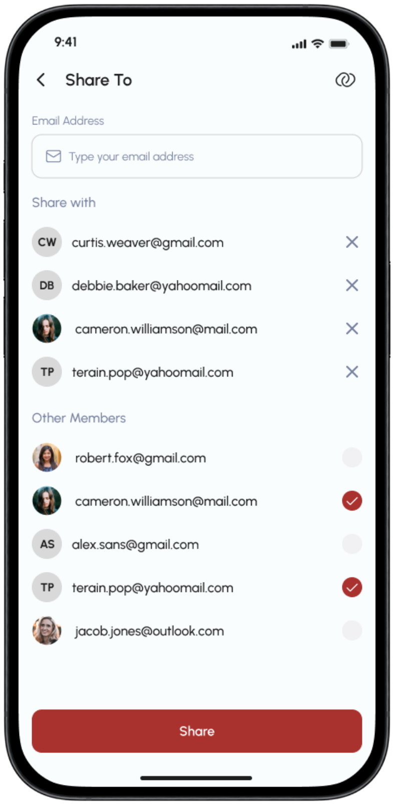


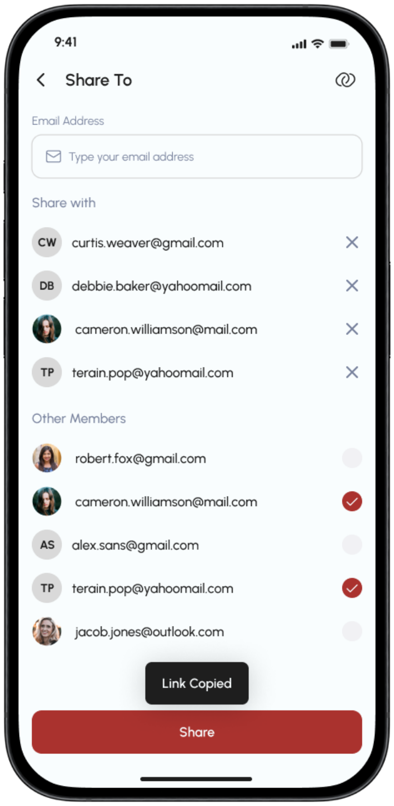


Sharing Files

- Tap the **Share Icon** after selecting a file.
- Enter the email addresses or usernames of the people you want to share the file with.
- Tap **Share** to send a link to the document, which can be accessed by the selected users.
- Tap **Link** icon to copy the link.

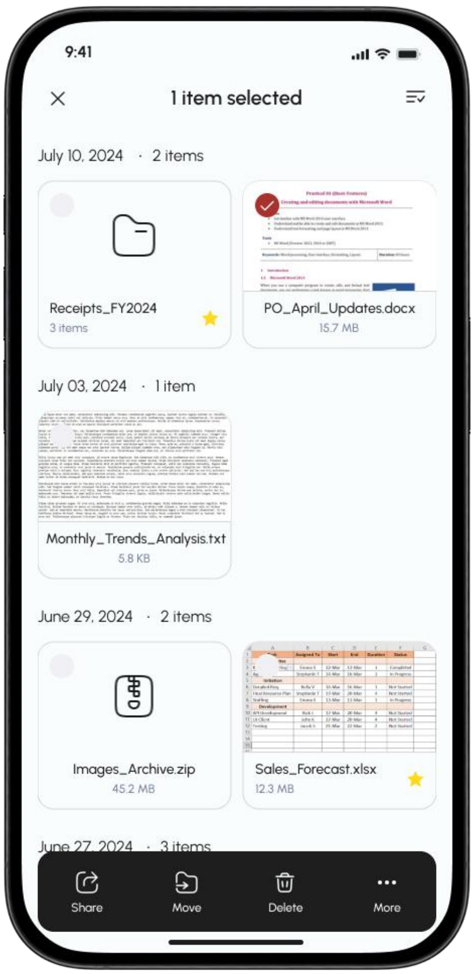


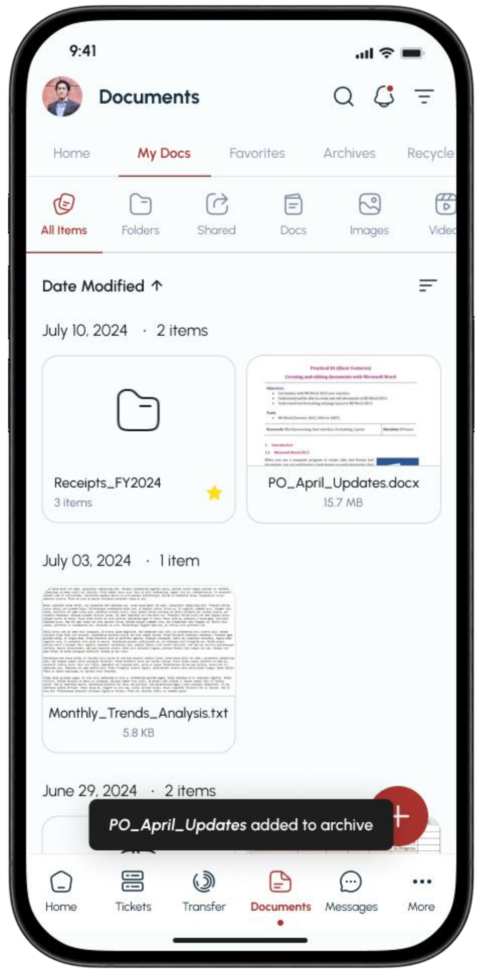




Archiving Files

- Select the file(s) you want to archive.
- Tap the **Archive Icon**.
- Archived files will be moved to the **Archive Tab**, where they can be restored or permanently deleted later.





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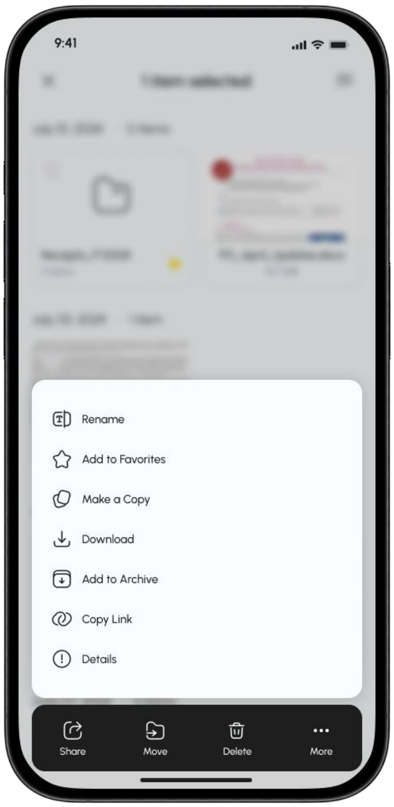
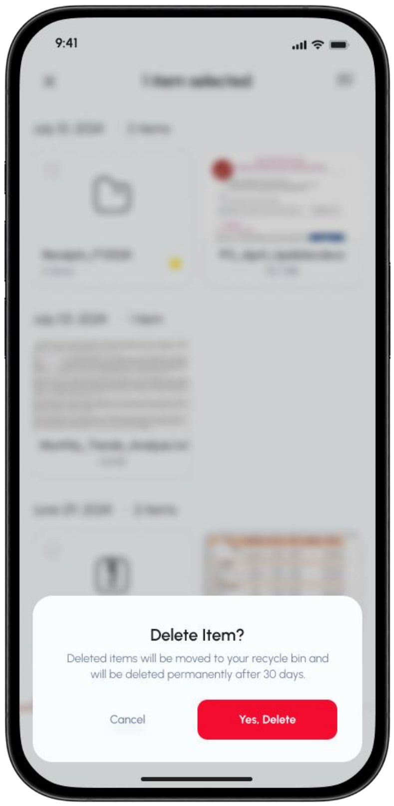
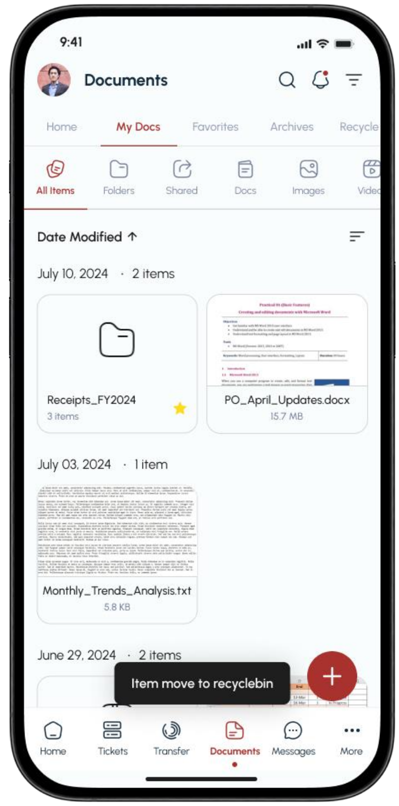
Deleting Files

- Select the file(s) you want to delete.
- Tap the **Delete Icon** and confirm the action.
- Deleted files move to the **Recycle Bin**, where they can be restored or permanently.

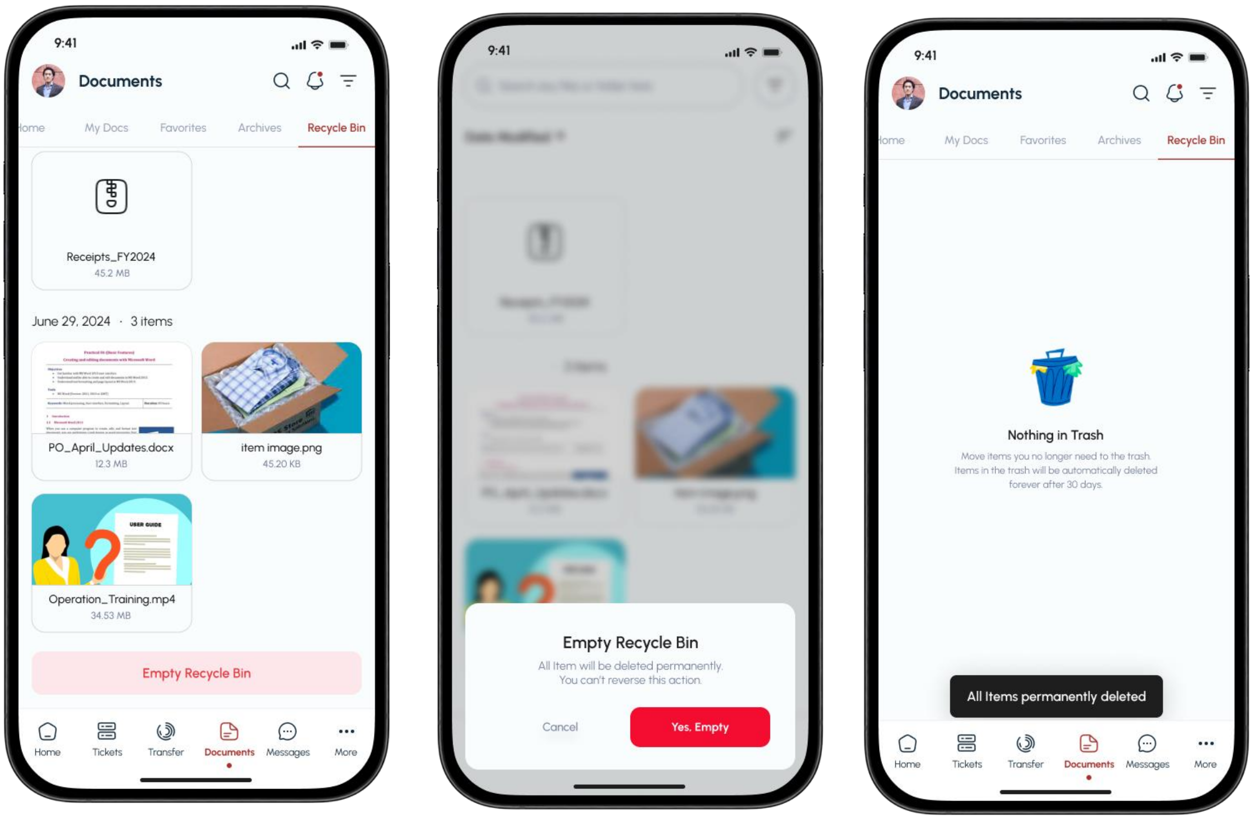






Emptying the Recycle Bin

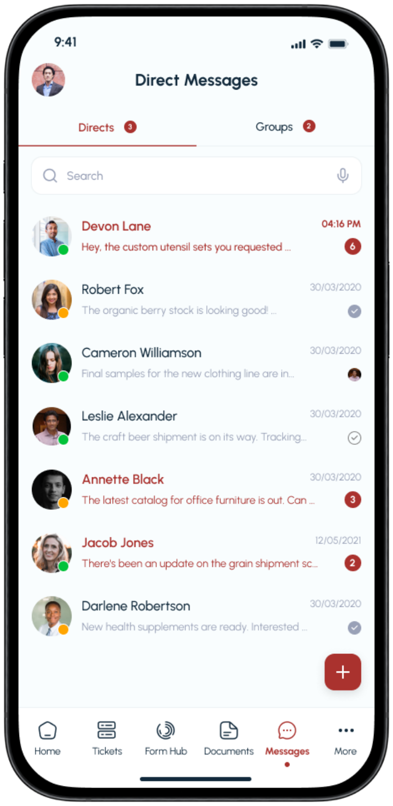
- Go to the **Recycle Bin** tab within the document management system.
- Tap the **Empty Recycle Bin** button to permanently delete all items.

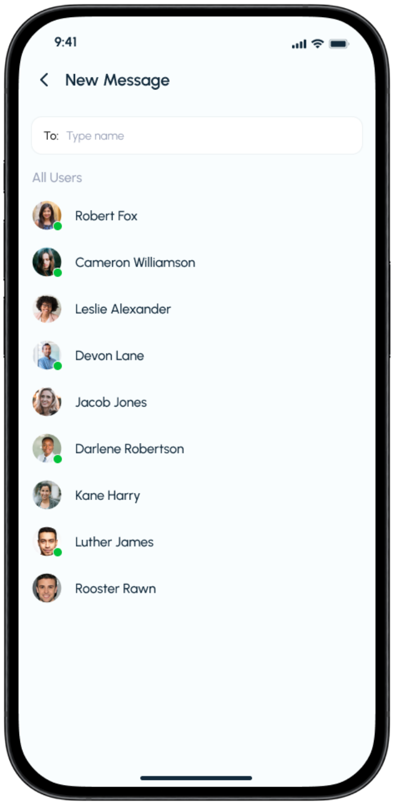


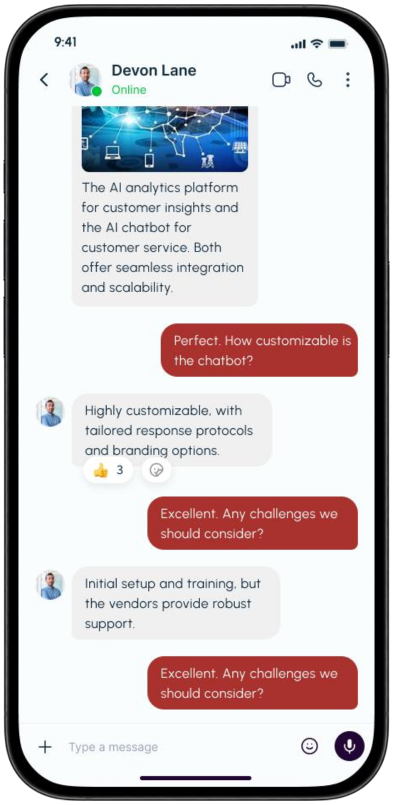
Messaging

Starting a Direct Message

- Tap the **Messages** tab from the navigation bar.
- Click on the **Direct Message** option to start a new conversation.
- Select a contact from the list or use the search bar to find the person by name or email.
- Type a message in the text box at the bottom of the screen, then hit **Send**.







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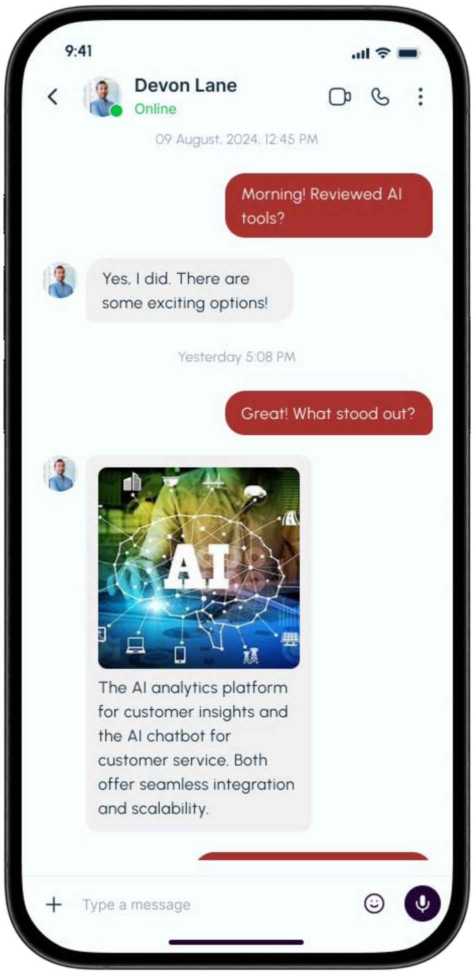
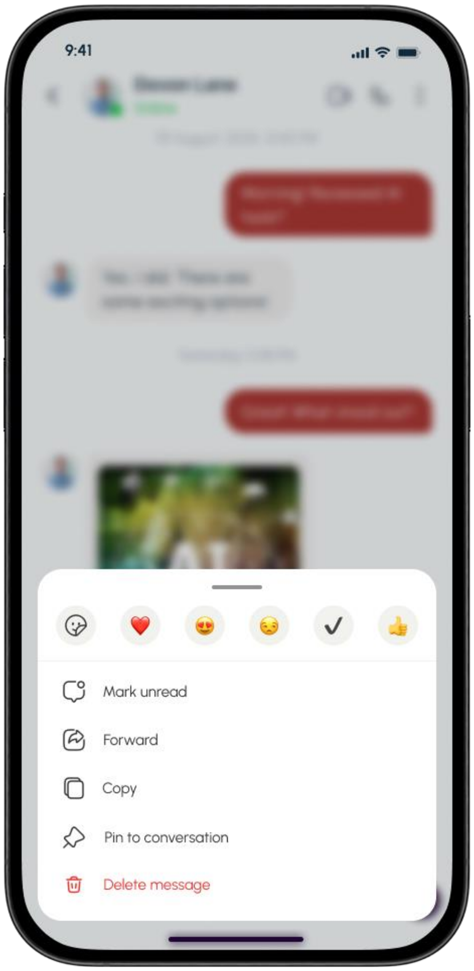
Messaging Options:

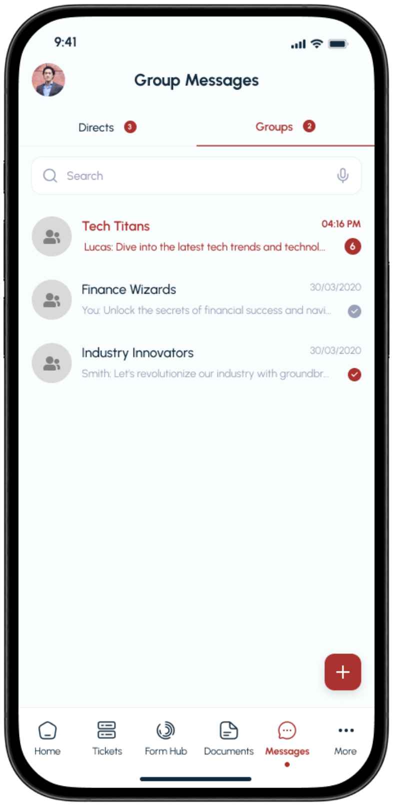
- **Replying:** Long press on a message to reply or react with an emoji.
- **Pinning Messages:** Select a message and pin it to keep important information visible at the top.
- **Forwarding:** Long press on a message to forward it to another contact.

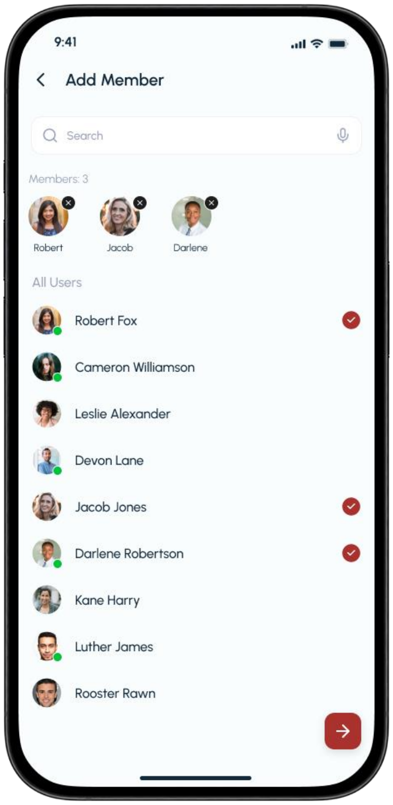


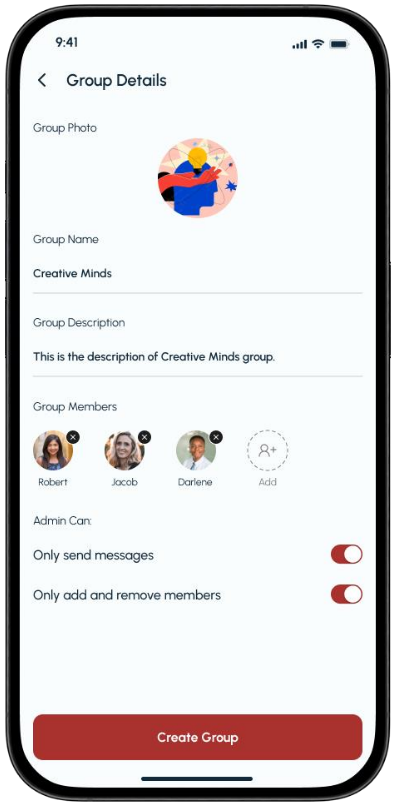


Group Messaging

- Go to the **Messages** tab and click the **Create New Group** button.
- Add members to the group by selecting them from the contact list or entering their email.
- Name the group and set a group description (optional).
- Tap **Create Group** to finalize.

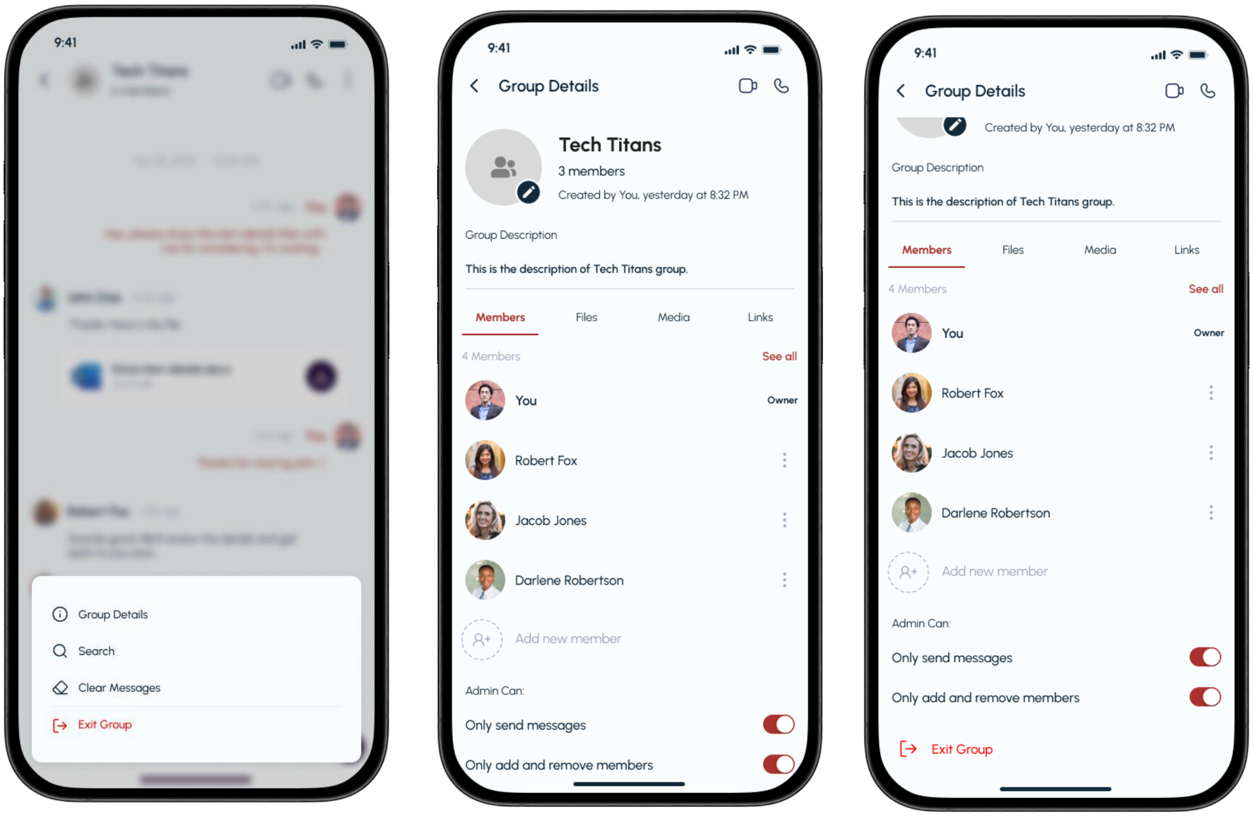






Managing Group Members

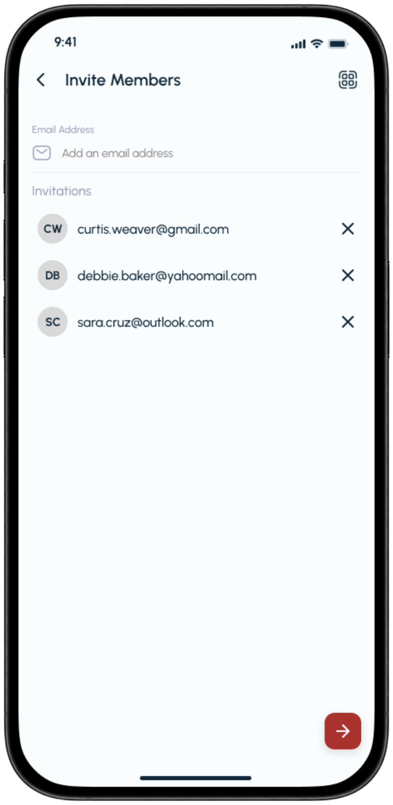
- **Adding Members:** Open the group chat, select the group details, and click
- **Add Members**. Select new members from the list.
- **Removing Members:** From the group details, long-press on a member’s name to remove them from the group.
- **Exiting the Group:** In the group settings, tap **Exit Group**.

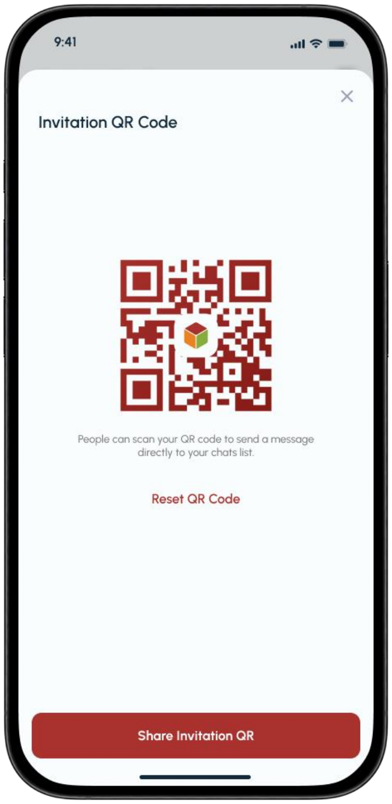


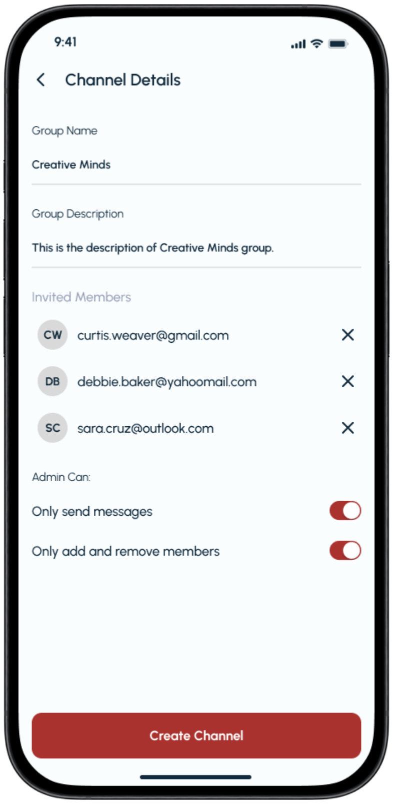
Channels

Creating and Managing Channels

- Channels are used to categorize communication based on topics or projects.
- **Creating a Channel:** In the **Messages** tab, select **Create Channel**. Name the channel and invite members. Optionally, choose between public or private visibility.
- **Inviting Members:** Once a channel is created, go to the channel's settings, select **Add Members**, and invite new people.
- **QR Code Invitation:** In the channel settings, generate a QR code for sharing the invitation link. This is useful for large teams.
- **Channel Permissions:**
  - **Admin Controls:** Only admins can add or remove members, set channel descriptions, or delete the channel.
  - **Member Controls:** Members can leave the channel, mute notifications, or customize their viewing preferences.







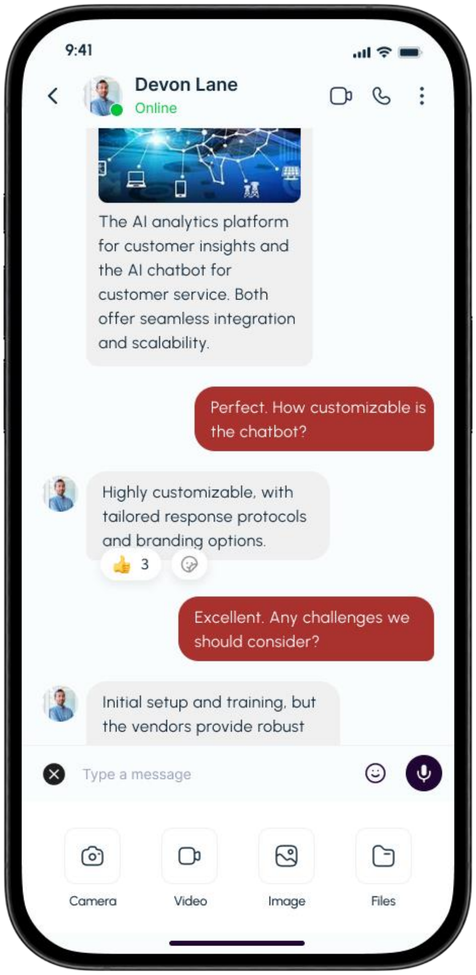
Media Sharing

Types of Media Supported:

- **Images:** Tap the attachment icon, select **Image**, and choose from the gallery or take a photo.
- **Files:** Attach documents, spreadsheets, or presentations.
- **Videos:** Share videos directly from your device or through cloud integration.
- **Voice Notes:** Record and send voice messages directly in the chat.

Viewing Shared Media:

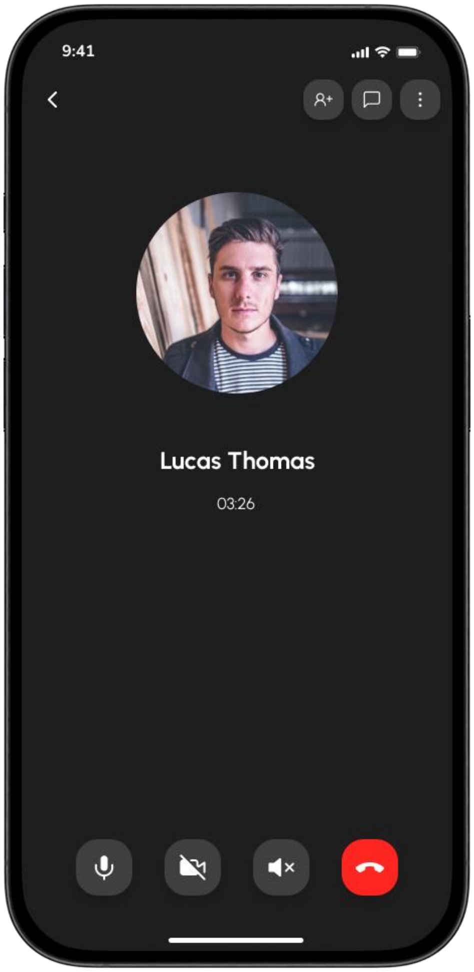
- All media is stored in the **Media** section of the group or direct message.
- Access shared files or images by tapping on the media icon in the chat header.



Calls and Audio/Video Messages

Starting an Audio/Video Call:

- Open a direct or group chat and tap the **Phone** or **Video Camera** icon in the top right corner.
- Wait for others to join and proceed with the call.



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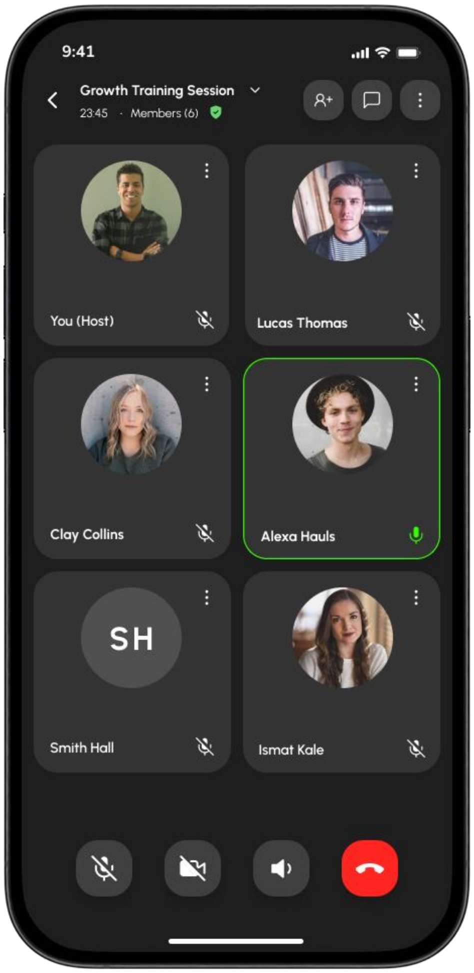
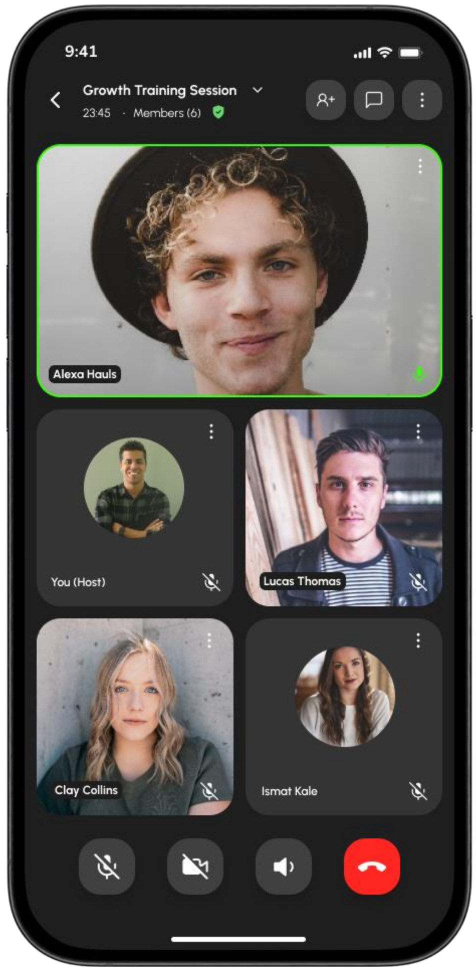
Group Audio/Video Calls:

- Group calls support up to 10 participants at a time.
- You can toggle between audio and video during a call.
- During the call, options like **mute**, **turn off video**, or **end the call** will be available at the bottom of the screen.





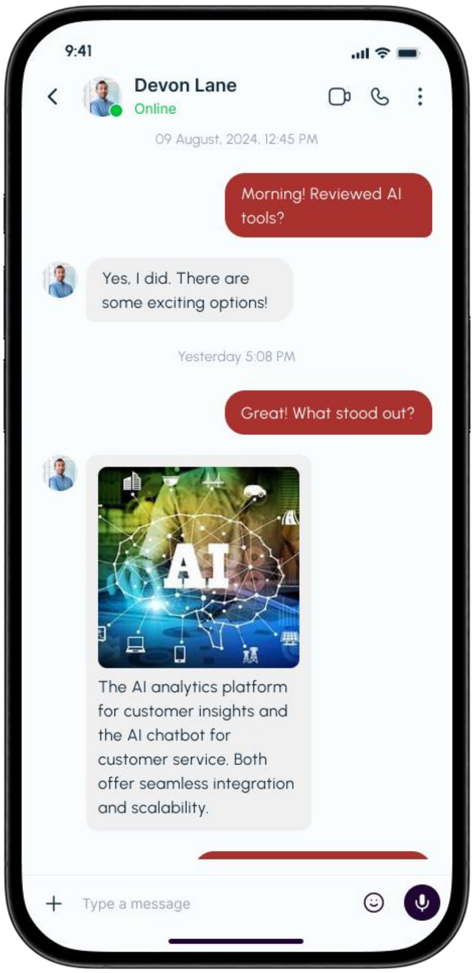
Message Reactions and Emojis

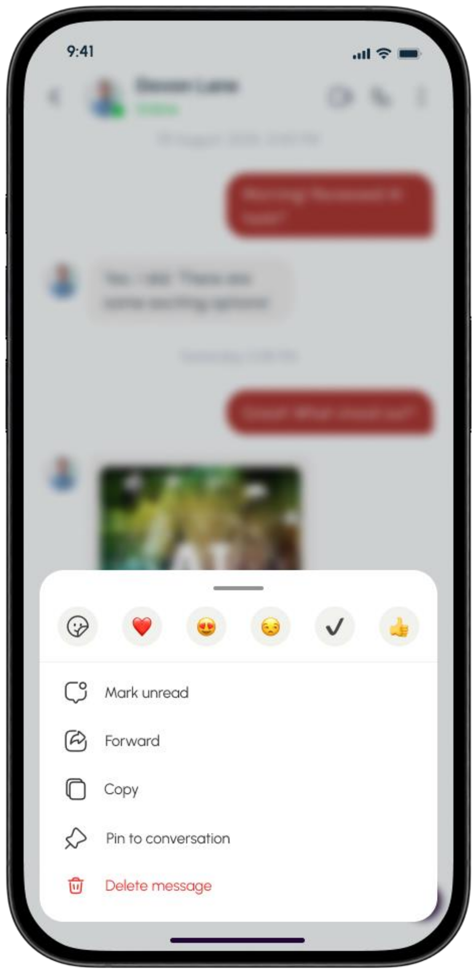
Reacting to Messages:

- Long press on any message to open the reactions menu.
- Select an emoji to react to the message, visible to all participants in the chat.

Custom Emojis:

- You can also upload custom emojis for your organization by tapping on the
- **Emoji** button in the chat box and selecting **Add Custom Emoji**.

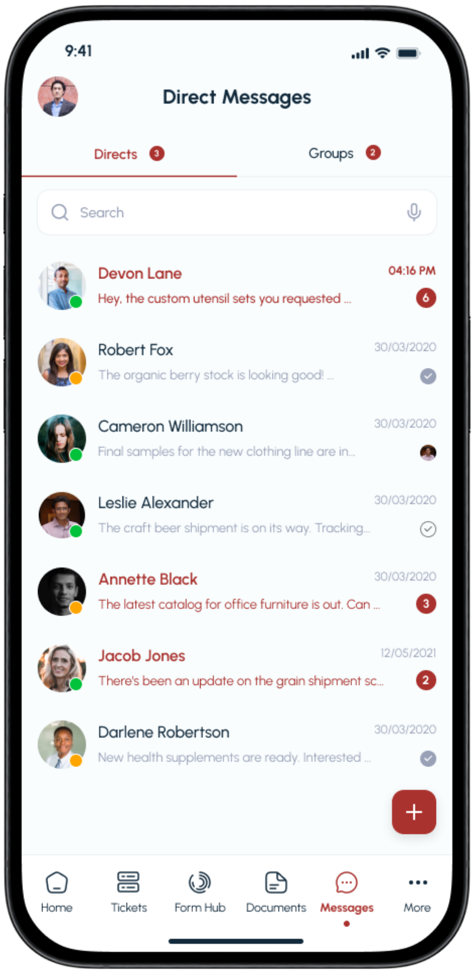




Message History and Search

Searching Through Chats:

- Use the search bar in the Messages tab to look for specific chats, keywords, or contacts.
- **Advanced Search** lets you filter by date, media type, or sender.



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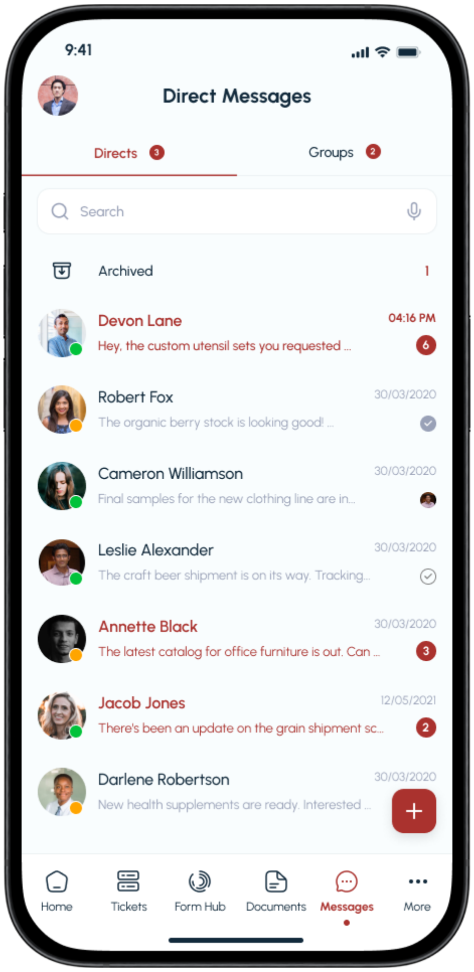
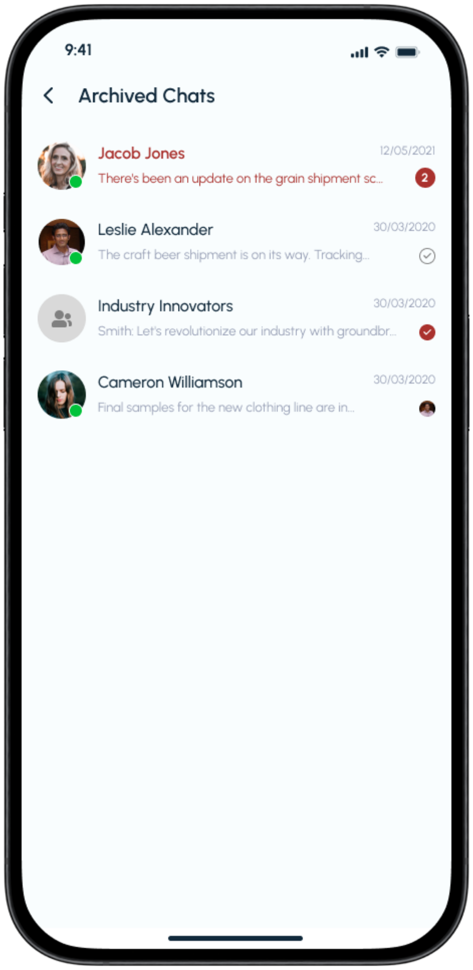
Archiving Chats:

- Swipe left on a chat in the messages list to archive it. Archived chats can be found in the **Archived Chats** tab.





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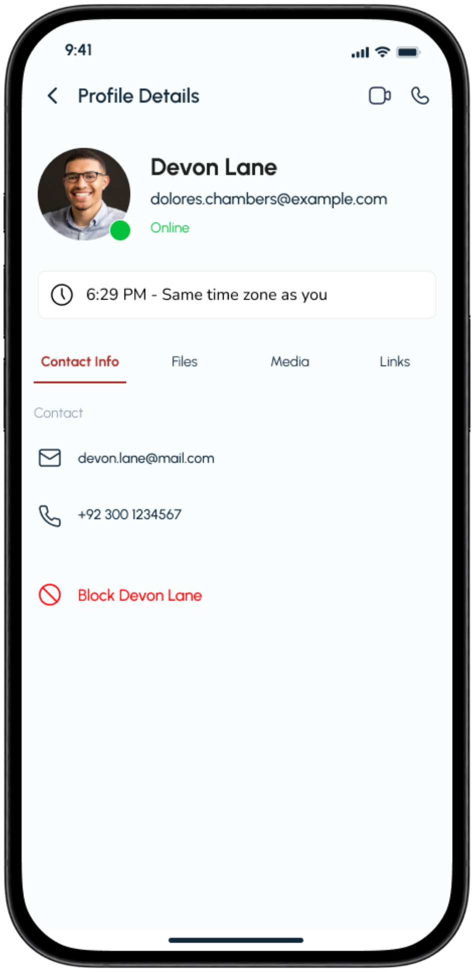
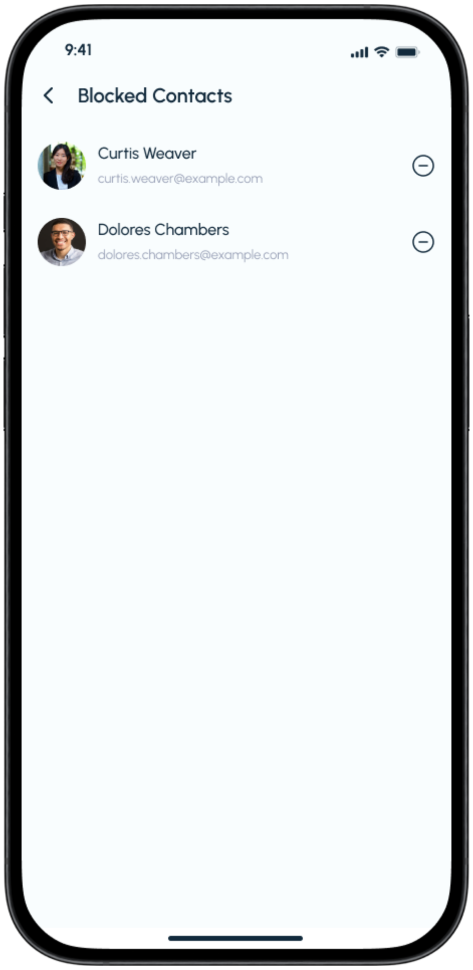
Blocking and Unblocking Contacts:

- **Block:** Open a direct message, go to the contact's profile, and select **Block Contact**.
- **Unblock:** In the **Blocked Contacts** section, select the contact and tap **Unblock**.



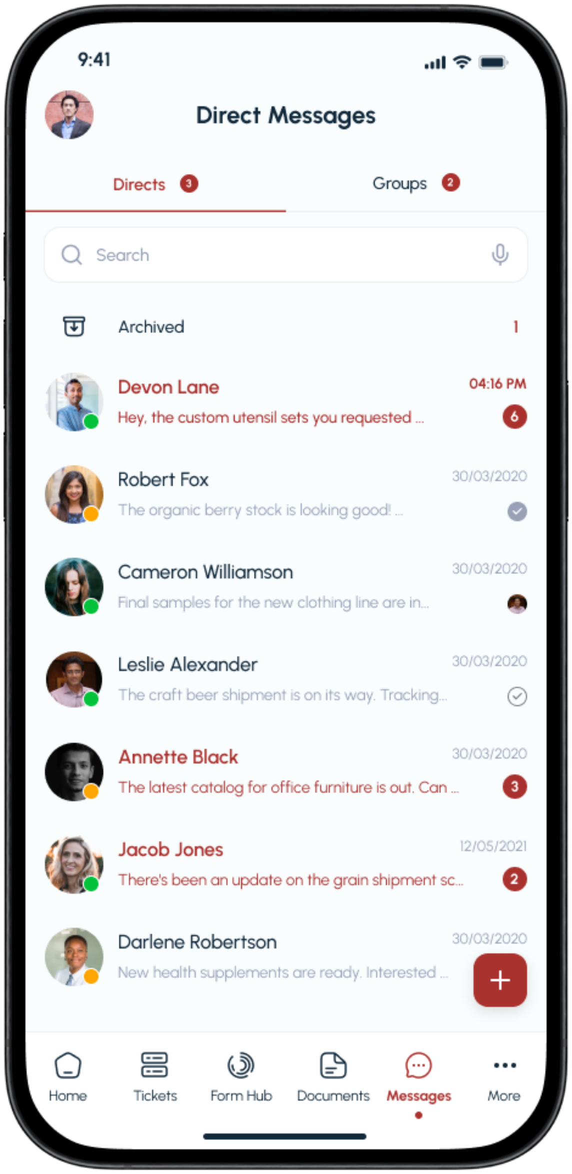


Notifications and Alerts

- **Mute Notifications:**
- Mute a chat or channel by going into the chat settings and selecting **Mute Notifications**. You can choose to mute notifications for a specific duration (e.g., 1 hour, 1 day, indefinitely).

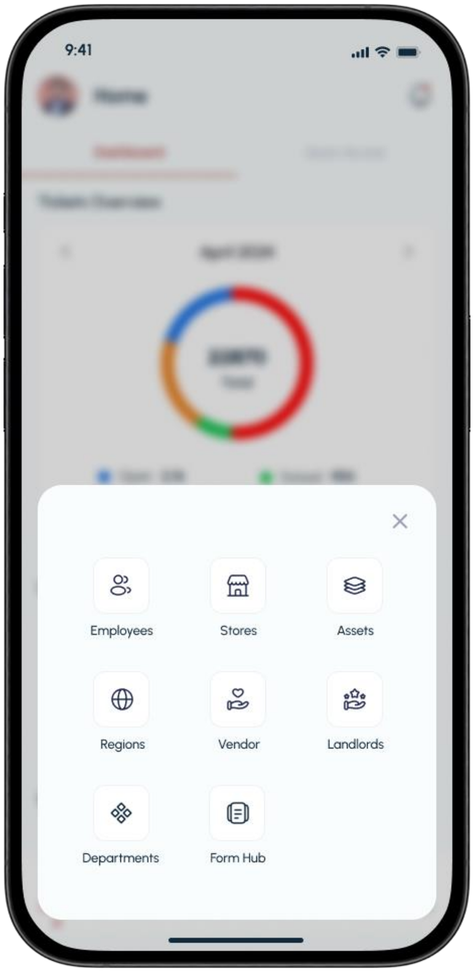
Unread Messages:

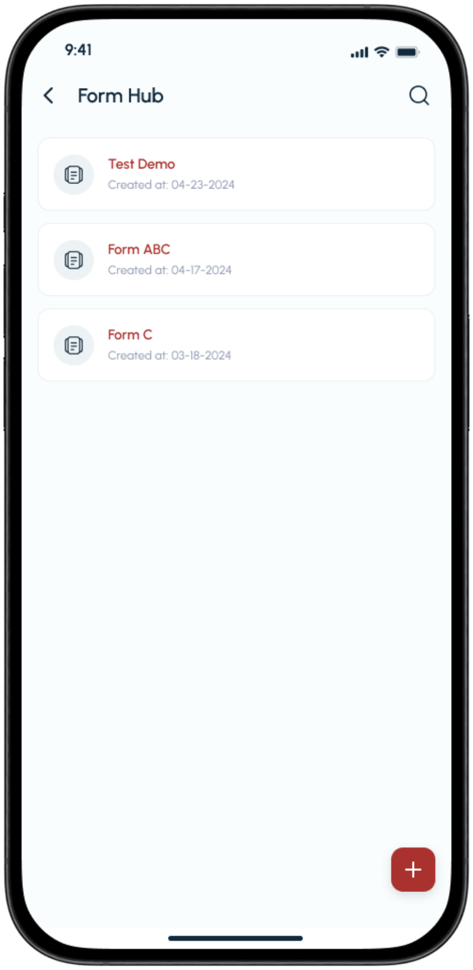
- All unread messages are highlighted in red in the **Messages** tab, making it easy to spot messages that need your attention.



FormHub

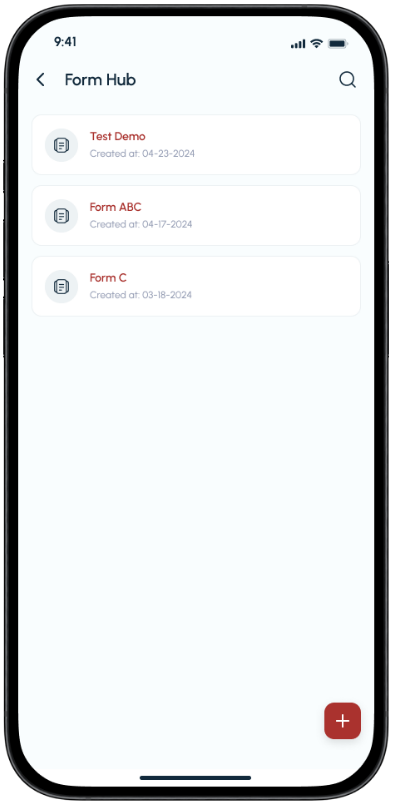
- From the main dashboard, tap the **FormHub** section to access all available forms.
- You'll see a list of existing forms such as **Form ABC**, **Form XYZ**, and others.

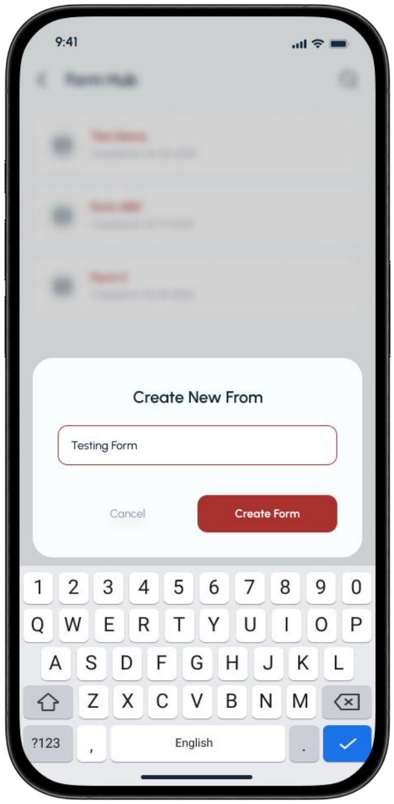


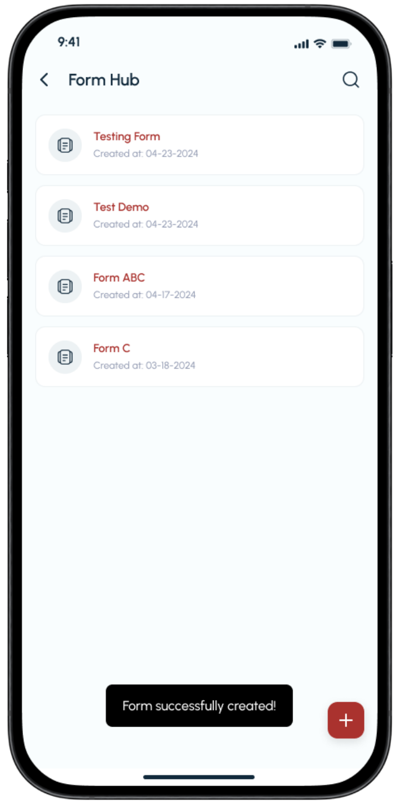


Creating a New Form

- Tap the **+ (plus)** button in the bottom-right corner to create a new form.
- Enter the **Form Name** (e.g., "Testing Demo").
- Tap **Create Form** to save your form.
- You will see a confirmation message, "Form successfully created."

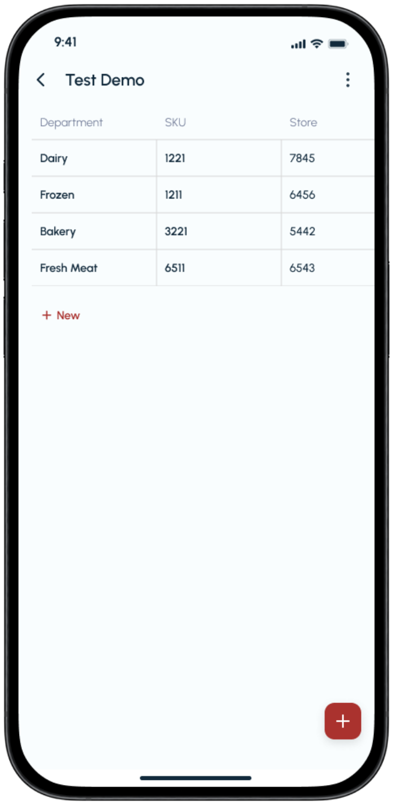


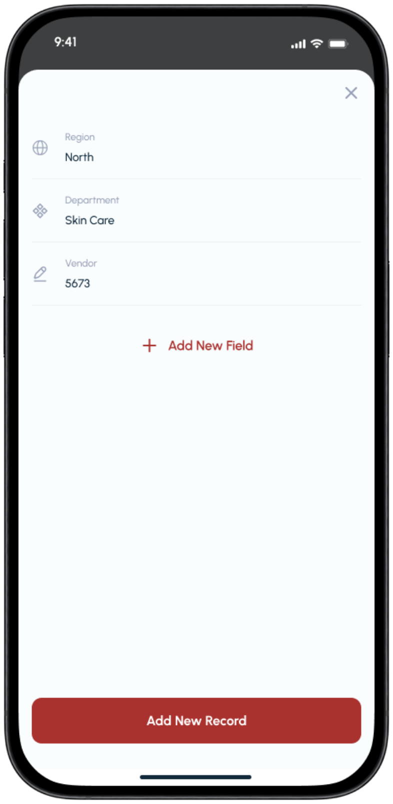


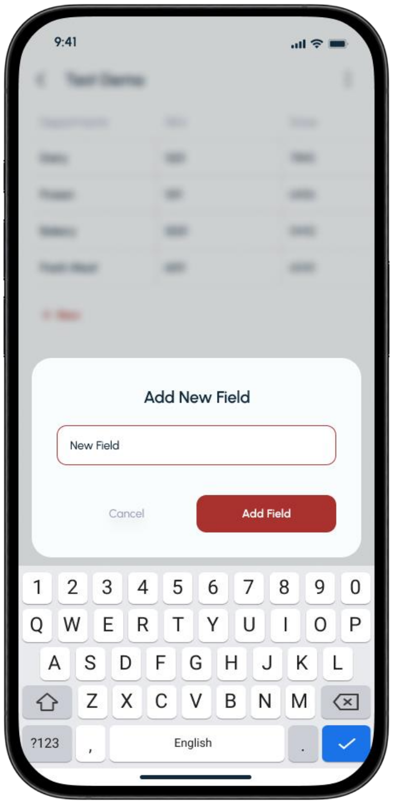


Adding New Fields to the Form

- Select the form you just created (or any existing form) from the FormHub list.
- To add new fields: Repeat this process to add multiple fields.
  - Tap **Add New Field**.
  - Enter the **Field Name** (e.g., Region, Vendor, or Department).
  - Tap **Add Field** to include it in the form.

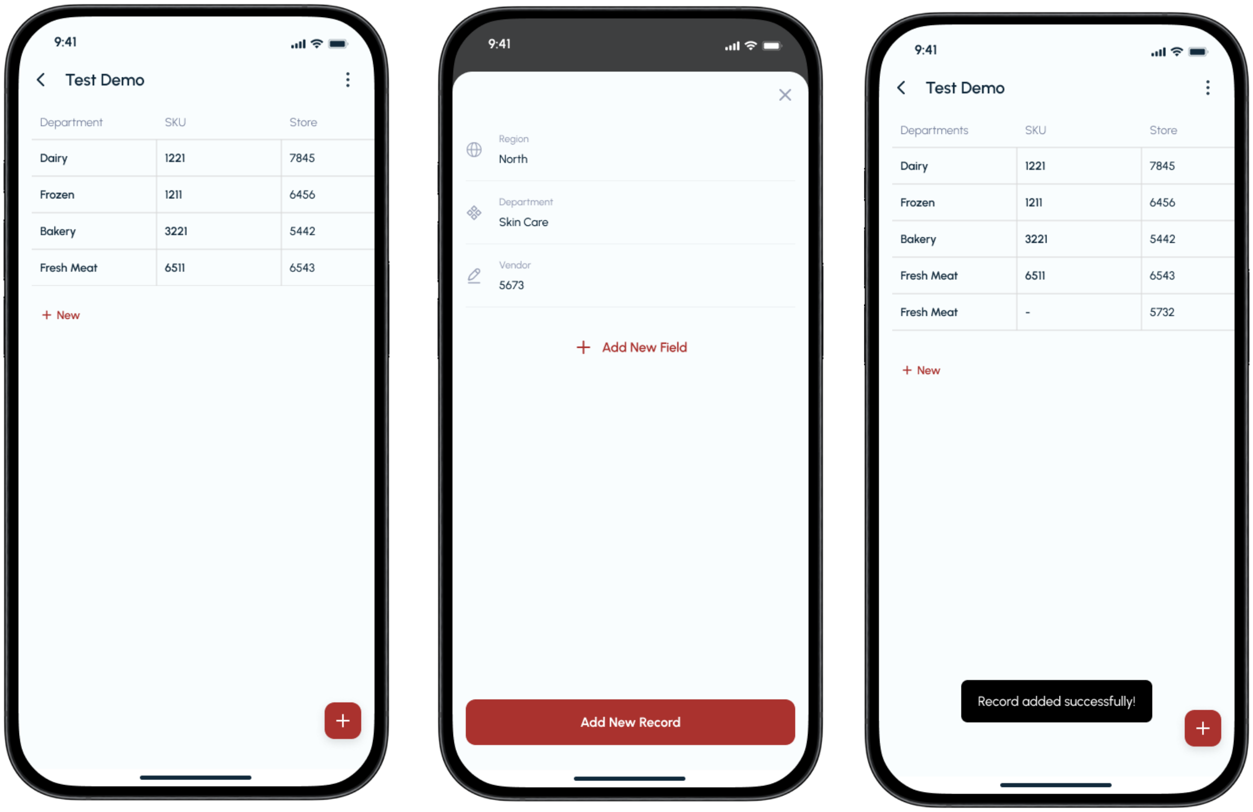






Adding Records to the Form

- Once the fields are added, tap **Add New Record** to start entering data for the form.
- Fill in the fields with relevant data.
  Example: For the field "Vendor," enter values like "Samsung," and for "Region," enter "North."
- Tap **Add Record** to save the data.
- A confirmation message will appear, "Record added successfully."



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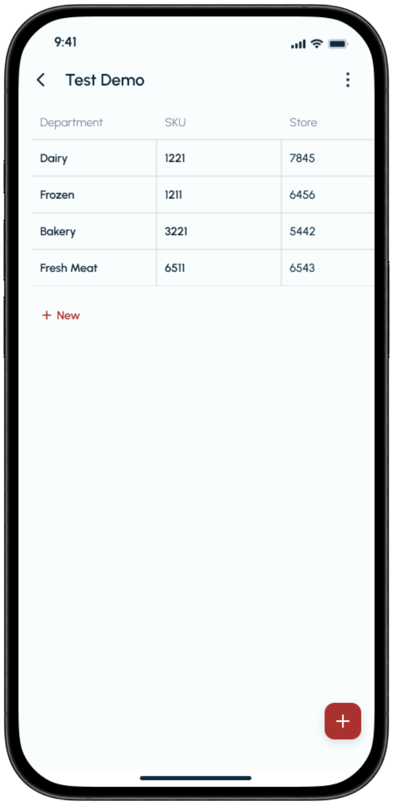
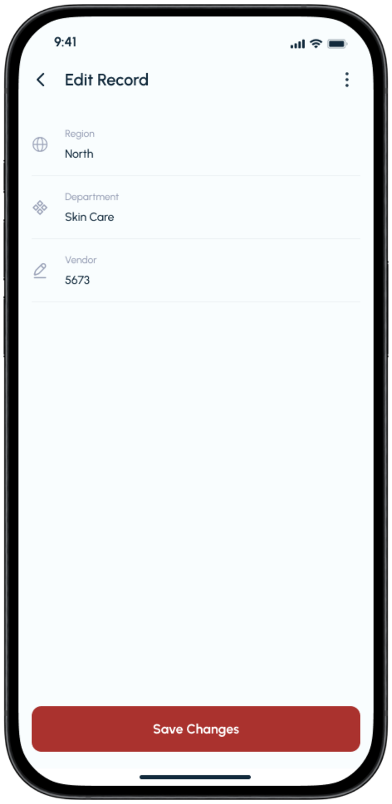
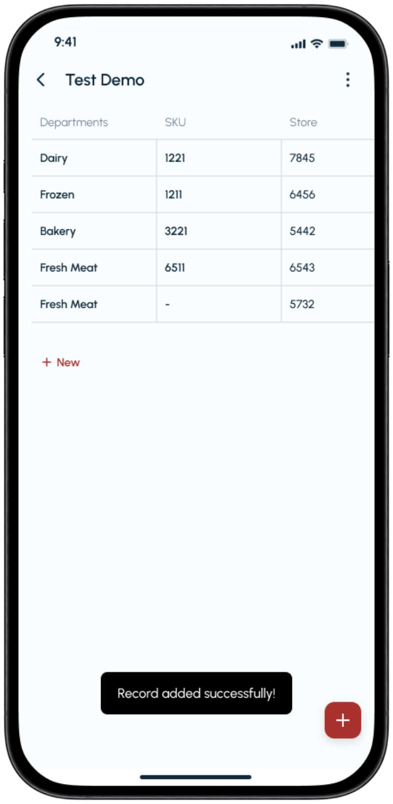
Editing an Existing Record

- To edit an existing record, tap the record you want to modify.
- Update the field values as needed.
- Tap **Save Changes** to confirm the updates.

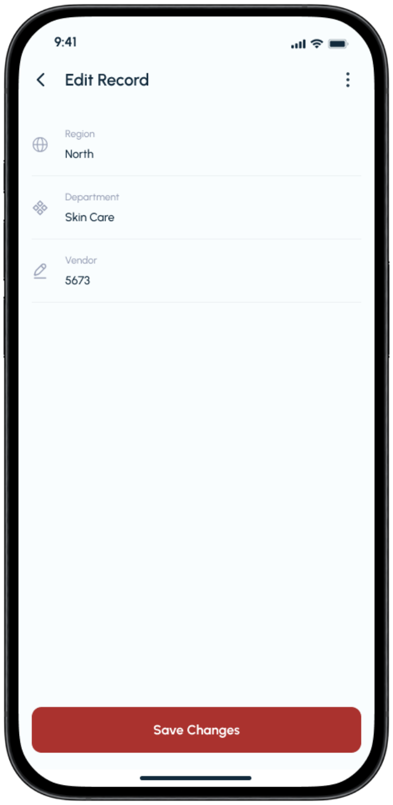


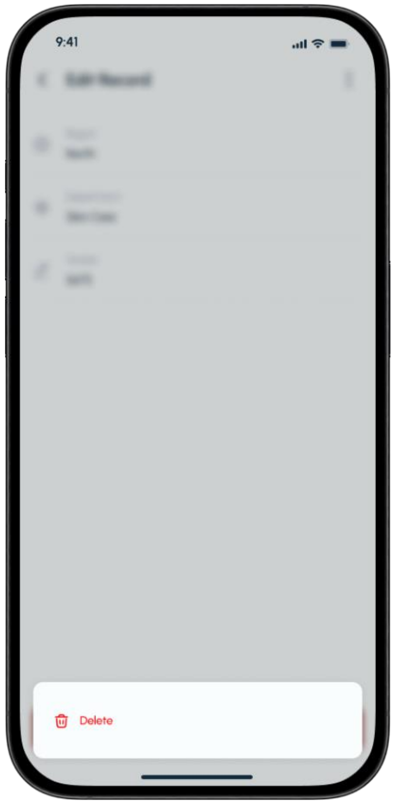


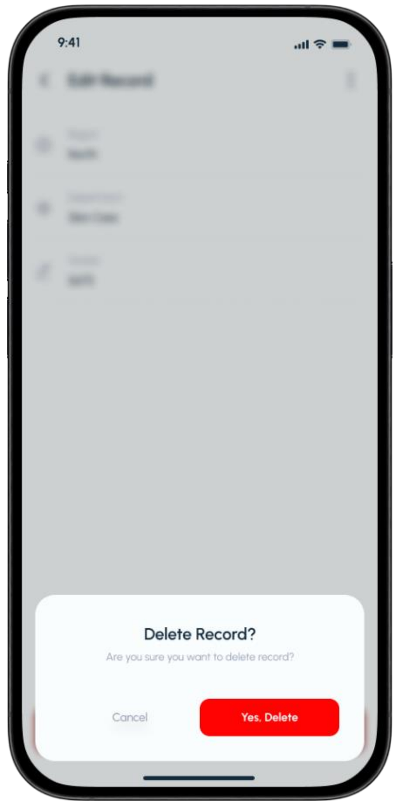


Deleting a Record

- To delete a record, tap on the record you wish to remove.
- Scroll to the bottom and tap **Delete**.
- Confirm the deletion by tapping **Yes, Delete**.







Deleting a Form

- To delete an entire form, open the form you want to delete.
- Click on three dot and tap the **Delete** icon.
- Confirm by tapping **Yes, Delete**.