ConSol Software GmbH

ConSol CM/Mobile App Manual

Version 3.4

Contents

A - Introduction

This section provides general information about the content and structure of this manual as well as an introduction to ConSol CM and the CM Apps.

This chapter discusses the following:

A.1 This Book's Structure

The book contains the following sections:

- Installation of the CM/Mobile App
- Overview of CM/Mobile
- Tickets
- Contacts

The screenshots in this manual were taken from an Android device.

A.2 Layout Explanations

The following icons and colors are used to emphasize and highlight information:

This is an additional information.

This is an important note. Be careful here!

This is a warning!

This is a recommendation from our in-the-field consultants.

A.3 Legal Notice

Since we would like to provide a manual for you which helps you manage your CM system, but which also provides additional information about connected topics, we have inserted external links into the manual. In this way, you can get some background information about a topic if you like. This can help you better understand the required CM configuration. Despite careful review, we assume no liability for the content of those external links. The operators of sites linked to are exclusively responsible for their content.

A.4 Gender Disclaimer

As far as possible, ConSol CM manuals are written gender-neutral and often address the user with "you". When the phrasing "The user .... he ..." is used, this is always to be considered to refer to both, the feminine as well as the masculine form.

A.5 Copyright

B - Installation of the CM/Mobile App

This chapter discusses the following:

B.1 Downloading the CM/Mobile App

You can download the CM/Mobile App from the ConSol MENA Appstore. Please proceed as follows:

1. Go to https://m.consol.ae/auth/login and log in with the following credentials:
   - **User:** cm6mobile@consol.ae
   - **Password:** consol123
2. Tap *Apps*. The ConSol MENA Appstore provides two different applications:
   - **CM/Track:** This is the app for customers. It provides similar features as ConSol CM/Track.
   - **ConSol CM:** This is the app for engineers. It provides similar features as the ConSol CM Web Client.
3. Tap the desired app, in this case, *ConSol CM*.

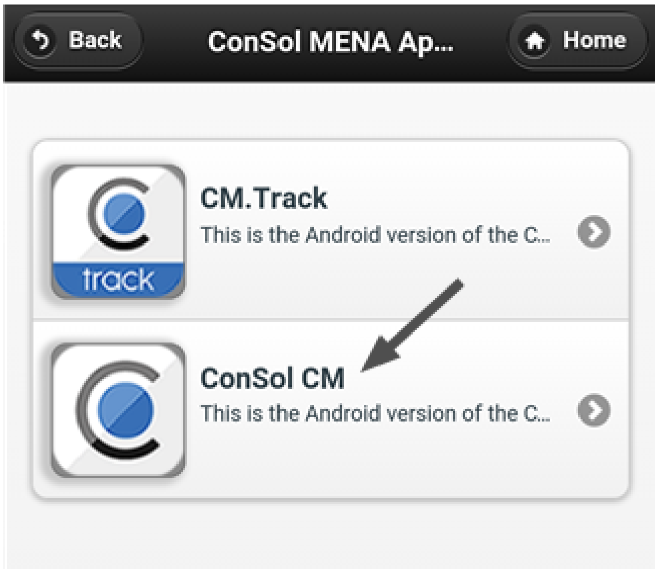


Figure 1: *ConSol MENA Appstore*

4. Currently, the latest version is 3.4. It is automatically selected. You can select a previous version using the drop-down menu below the app name.

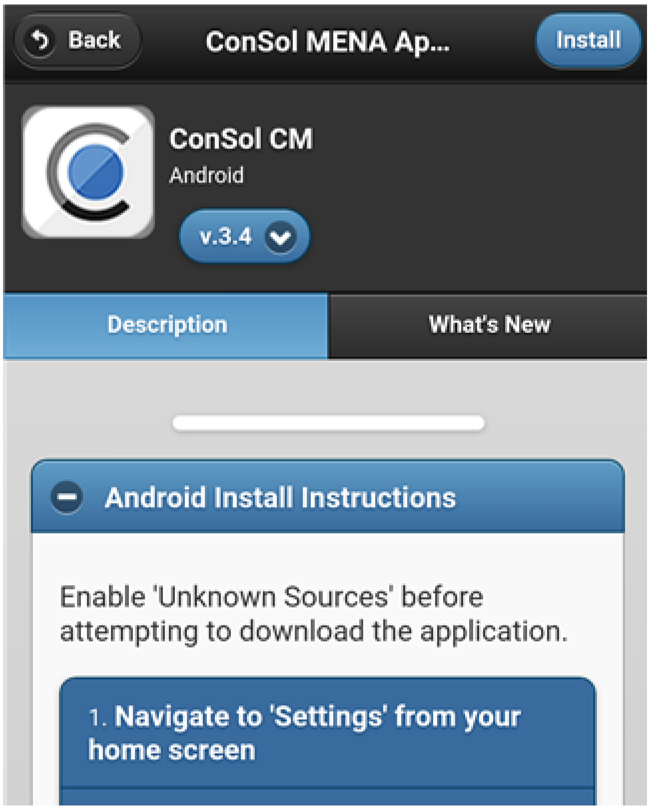


Figure 2: *Details of the ConSol CM app*

5. Follow the installation instructions and tap *Install*.
6. Confirm the app's permissions and install the app.

B.2 Configuring the CM/Mobile App

1. When you start the CM/Mobile App for the first time, you have to configure the server connection. Tap the settings icon on the login screen:

2. Make the following settings on the *Settings* screen:

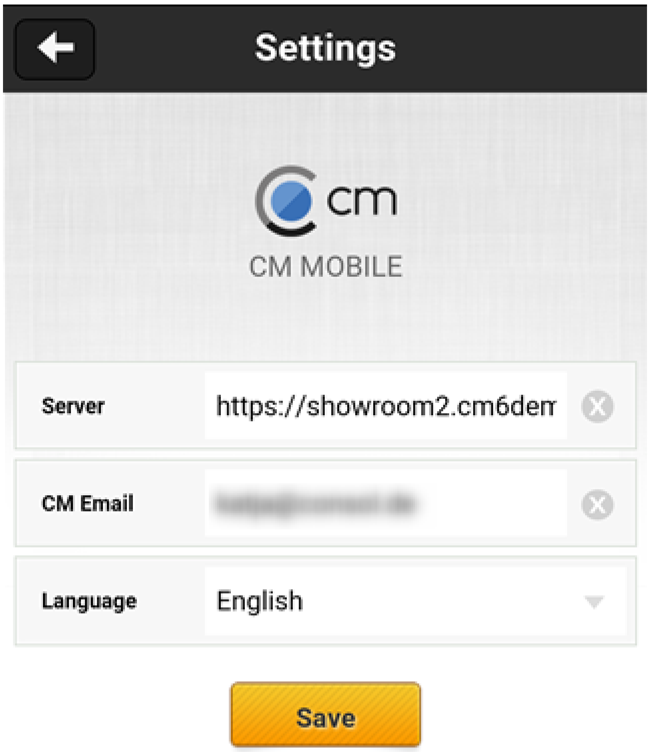
   

   Figure 3: *Settings CM/Mobile*

   - **Server:** Enter the URL of the ConSol CM server. Please ask your administrator if you do not know the URL.
   - **CM Email:** Enter the email address of ConSol CM. Please ask your administrator if you do not know the email address.
   - **Language:** Select the desired language for the CM/Mobile App. You can choose German or English.

3. Tap *Save* to finish the configuration. Now you can log in to the CM/Mobile App with your usual user name and password.

C - Overview of CM/Mobile

CM/Mobile offers access to the core functionalities of the ConSol CM Web Client. This includes creating, editing and processing tickets, and creating and editing contacts.

In this section, you find information about the following topics:

- the user interface of CM/Mobile (CM/Mobile GUI)
- the search functionalities (Search Features)
- a summary of the most important actions (Quick Start)
- the favorites feature (Favorites)

The following sections Tickets and Contacts contain a detailed description of how to work with tickets and contacts.

C.1 CM/Mobile GUI

This chapter discusses the following:

C.1.1 Home Screen

Logout button: Tap to end your session.

Tiles: Tap the tile with the desired function. The available tiles are Create Ticket, Ticket List, Search Ticket, Create Contact, Search Contact, and Favorites.

Favorites: List of tickets marked as a favorite. Tap a ticket to open its details.

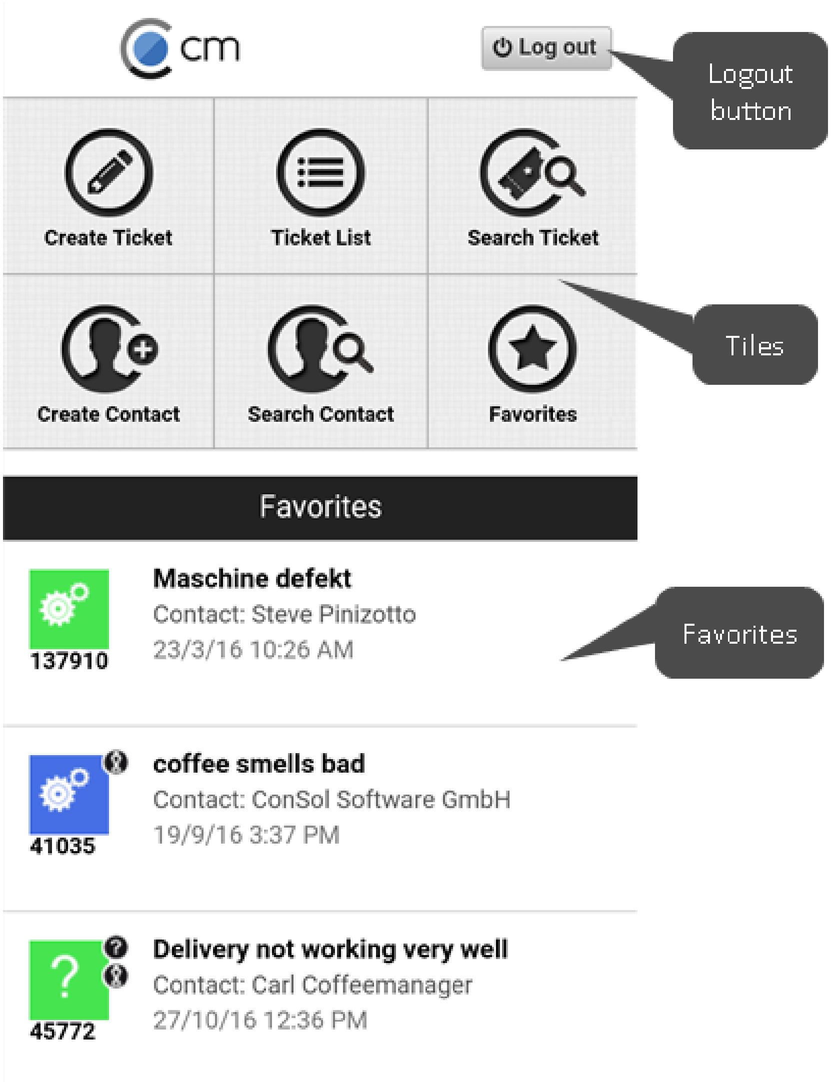
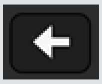


Figure 4: *Home screen*

C.1.2 Navigation Features

Button	Description
	Tap the *Home* button in the upper left corner to return to the Home screen at any moment.
	Tap the *Back* button next to the *Home* button to go to the previous screen.
	Tap the dots at the bottom of the screen or swipe to navigate the ticket details.
	Tap the *View* button in the upper right corner of the screen to change the view of the ticket list.

C.2 Search Features

CM/Mobile offers search functionalities in several places. The purpose of the search depends on its location.

C.2.1 Search Tiles

Location: Home Screen

Purpose: Find a ticket or contact and open its details.

Procedure: Enter the search term. The matching tickets or contacts are displayed in a list below.

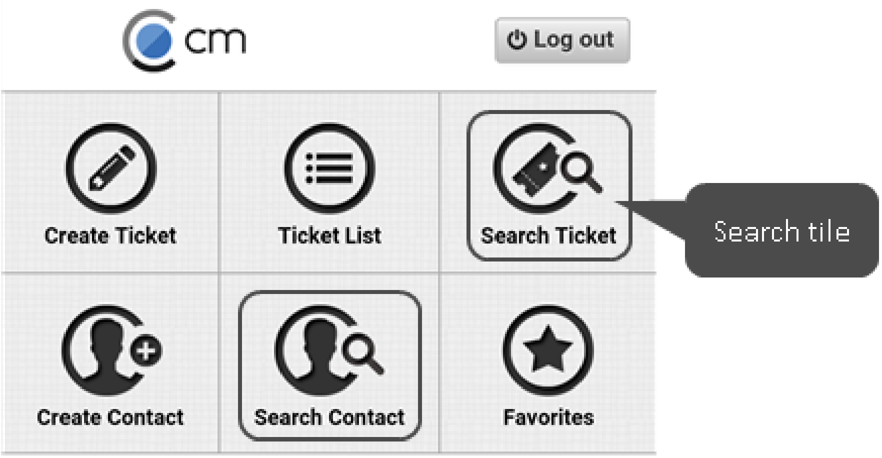


Figure 5: *Search tiles*

C.2.2 Engineer Search

Location: Ticket, when creating a ticket or editing ticket data.

Purpose: Find an engineer and assign the ticket to him.

Procedure: Enter the engineer's name in the *Search Engineer* field and select one of the suggested engineers. The matching engineers are sorted alphabetically.

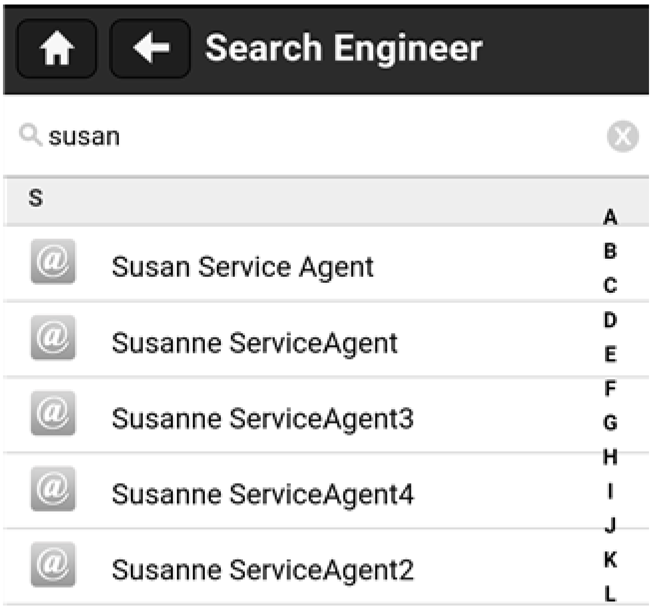


Figure 6: *Engineer search for "susan"*

C.2.3 Ticket Search

Location: Ticket, when adding a ticket relation.

Purpose: Find a ticket and add a relation between the selected ticket and the current ticket.

Procedure: Enter the search term in the *Search Ticket* field. You can search by ticket number (the number shown below the ticket icon) or by keyword from the ticket subject. Depending on the individual configuration of your CM system, it might also be possible to search for the values of certain ticket fields.

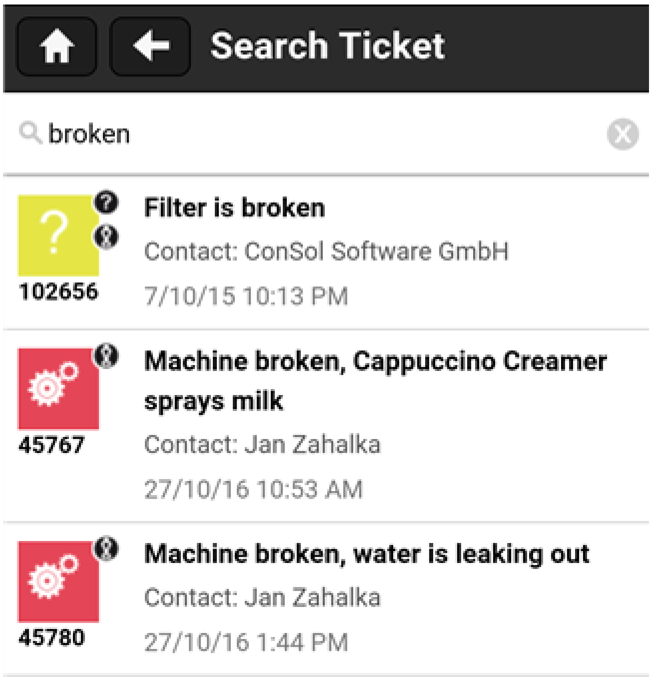


Figure 7: *Ticket search for "broken"*

C.2.4 Contact Search

Location: Ticket, when creating a ticket or changing the ticket's contacts.

Purpose: Find a contact and add him as the ticket's main contact or additional contact.

Procedure: Enter the contact's name in the *Search Contact* field. You can search by the name of the contact or by the name of the company which the contact belongs to. Depending on the individual configuration of your CM system, it might also be possible to search for the values of certain contact fields. The matching contacts are sorted alphabetically.

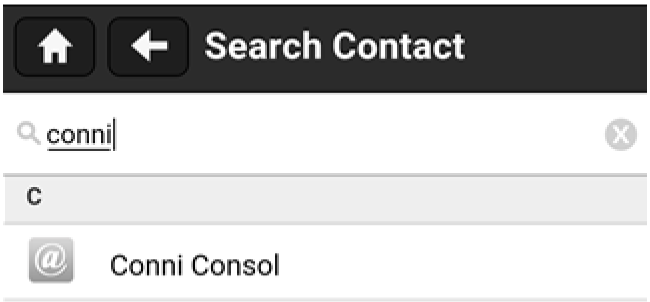


Figure 8: *Contact search for "conni"*

C.2.5 Company Search

Location: Contact, when creating a contact or editing a contact.

Purpose: Find a company and set it as the company which the contact belongs to.

Procedure: Enter the company's name in the *Search Company* field. Depending on the individual configuration of your CM system, it might also be possible to search for the values of certain company fields. The matching companies are sorted alphabetically.

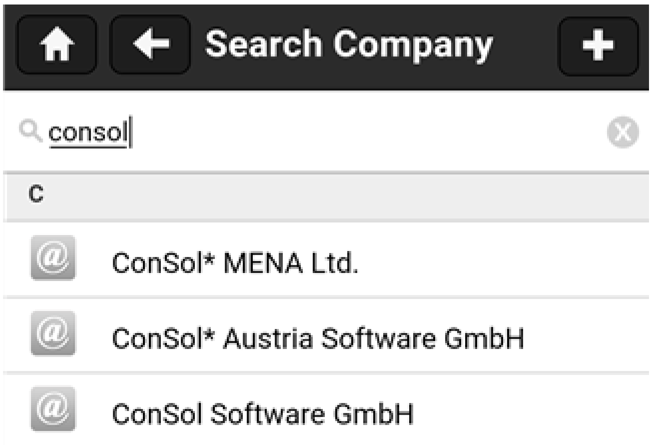


Figure 9: *Company search for "consol"*

C.3 Quick Start

This section contains a brief description of the main tasks you need to carry out to get started.

C.3.1 Log in

To log in to CM/Mobile for the first time:

1. Tap the settings icon below the *Sign in* button.
2. Enter the URL of the server and your email address. Ask your administrator if you are unsure which URL to use.
3. Select the desired language. Currently, CM/Mobile is available in German and English.
4. Tap *Save* to save your settings.
5. Enter your user name and password on the login screen.
6. Tap *Sign In*.

> For subsequent logins, you only need to provide your user name and password.

C.3.2 View a Ticket

To open the ticket details, select the ticket in one of the following locations:

- Tap the *Search ticket* tile to search for the ticket, see Search Ticket.
- Open the ticket list to select a ticket, see Ticket List.
- Select the ticket from the Favorites.

Browse the ticket details by swiping or tapping the little dots at the bottom of the screen, see Ticket Details.

C.3.3 Move a Ticket through the Process

You use workflow activities to move the ticket through the process.

1. Open the ticket details.
2. Tap the *Process* button at the bottom, see Process.
3. Tap the desired activity.

C.3.4 Create a Ticket

To create a new ticket, tap the *Create Ticket* tile and proceed as described in Create Ticket.

C.4 Favorites

You reach this screen by tapping the *Favorites* tile on the *Home* screen. It shows a list containing the tickets which you added as favorites.

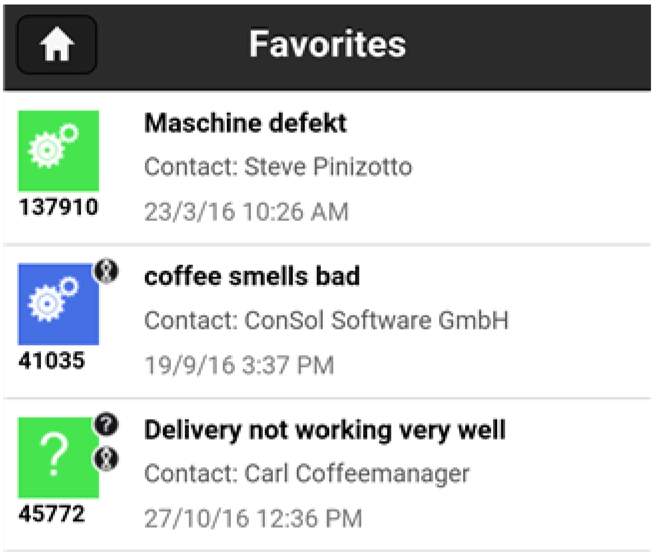


Figure 10: *Favorites screen*

- Tap a ticket to open its details.

ⓘ You can add a ticket to your favorites by selecting the option Add to Favorites in the ticket details.

D - Tickets

This chapter discusses the following:

D.1 Definition

The ticket is the request of the customer which the engineers work on. This can be an incident, a service case, or any other request. For each request, a ticket is created. The engineers work on the ticket, which means that they carry out the necessary steps as defined in the business process. The progress, including internal and external communication, is documented in the ticket. The business process can involve several engineers and different teams. When the request is solved, the ticket is closed. Closed tickets are not lost, but they represent a powerful archive and knowledge base.

D.2 Structure of a Ticket

A ticket consists of several screens, which are described in section Ticket Details.

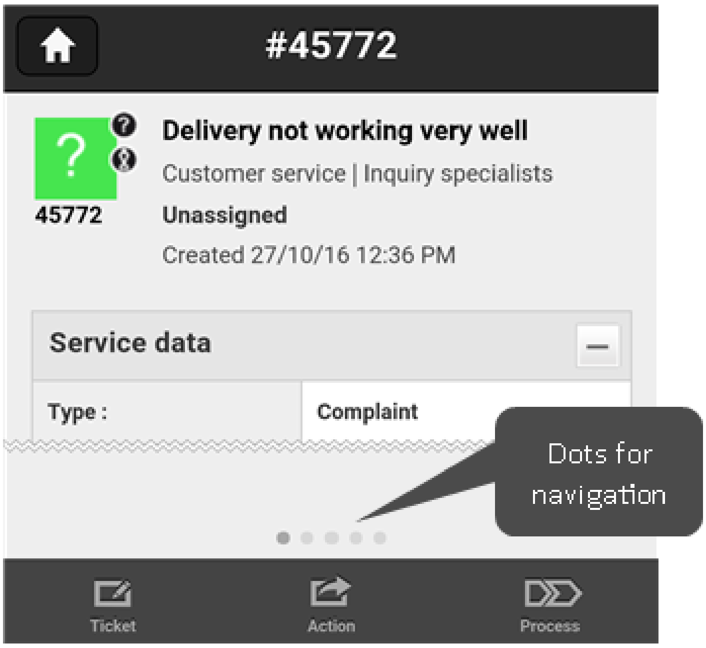


Figure 11: *Ticket*

You can view the different screens by swiping or tapping the dots at the bottom of the screen.

D.3 Accessing Tickets

There are three ways to access a ticket:

1. Select a ticket from the ticket list.
2. Select a ticket from your list of Favorites.
3. Search for a ticket on the Search Ticket screen.

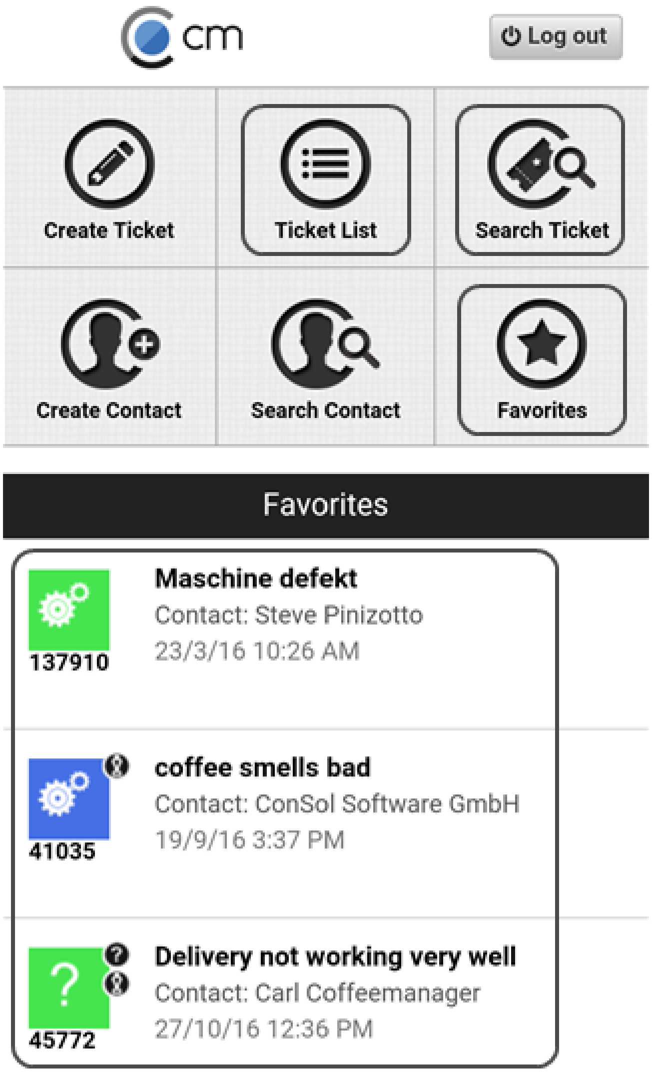


Figure 12: *Ticket items on the Home screen*

D.4 Working with Tickets

As an engineer, you can use CM/Mobile to carry out the following actions for tickets:

- You create a new ticket, e.g., a customer calls and you create a support ticket, see section Create Ticket.
- You accept an already created ticket to start working on it, see description of the Accept action.
- You edit the ticket data to enter all the information, see description of the Edit action.
- You edit the ticket's contact, e.g., to add an additional contact who wants to receive information about the ticket status, see description of the Edit Contacts action.
- You add a comment to the ticket, e.g., to record your work, see description of the Add Comment action.
- You attach a photo to the ticket, see description of the Add Photo action.
- You read an email that was received by the ticket and answer it, see description of the Send email action.
- You add a link to another ticket which deals with a similar topic, see description of the Add Relation action.
- You close the ticket after adding a comment with the solution, see section Process.

D.5 Create Ticket

You reach this screen by tapping the *Create Ticket* tile on the *Home* screen. It allows you to create a new ticket.

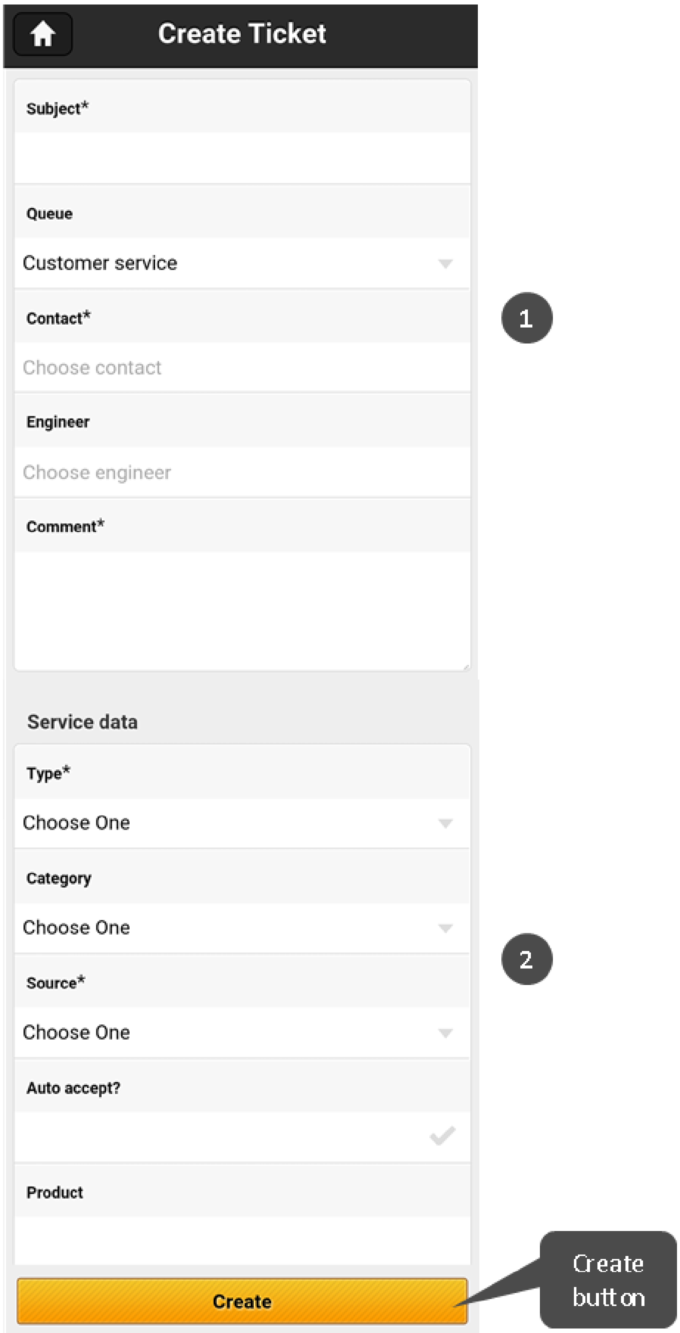
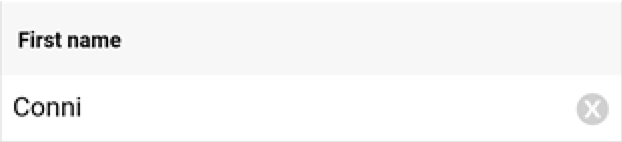


Figure 13: *Create Ticket screen*

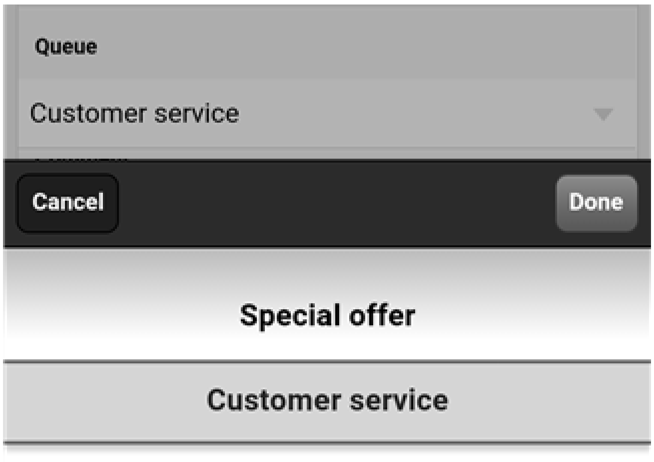
1. Fill out the data fields. The first part of the screen contains the general data fields (1), which are always available (*Subject*, *Queue*, *Contact*, *Engineer*, *Comment*). The data fields in the second part of the screen depend on the selected queue (2).
2. Tap *Create* to create the ticket.

There are several types of data fields:

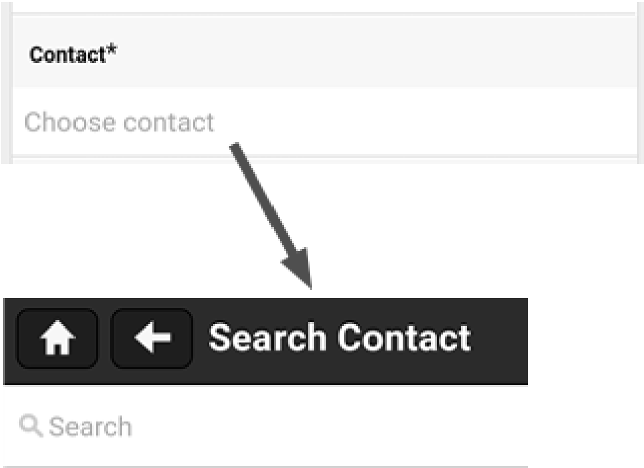
- **Text fields:** Enter the value in the blank space below the field name. Tap the little cross on the right to clear the content of a field.



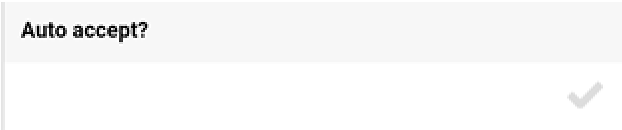
- **Selection fields:** These fields have a small arrow on the right, after the field name. Tap the field name and select a value. This can be a value from a list or a date.



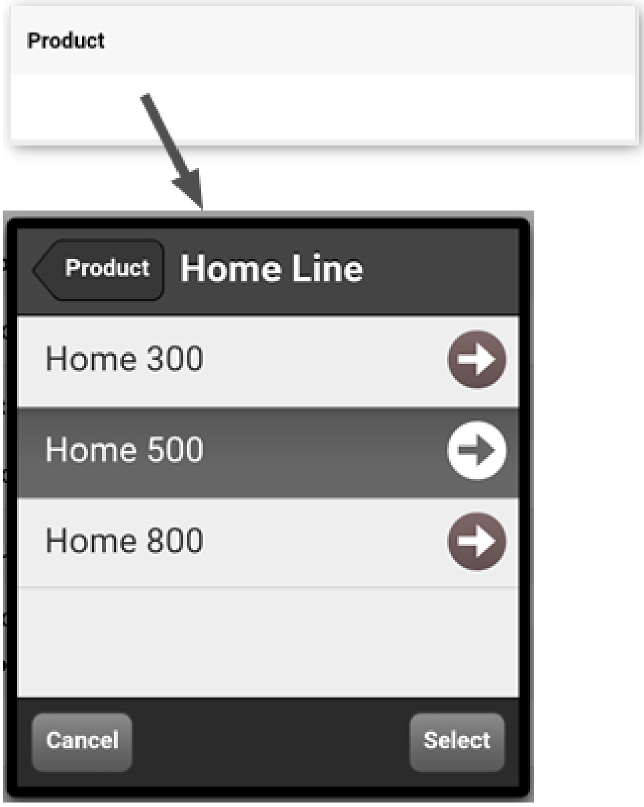
- **Search fields:** These fields open a search screen, see Search Features. Enter the value on the search screen and select one of the suggestions.



- **Checkbox fields:** These fields have a checkmark on the right. Tap the field to activate it (the checkmark is displayed in a darker font). Tap again to deactivate the field.



- **Multilevel selection fields:** These fields initially look like text fields. When you tap the white space, a pop-up window opens, which allows you to navigate through a hierarchical list of entries. Tap the arrow on the right of an entry to navigate to the subordinate entries. To go back to the previous level, tap the *Back* button. You can select an entry at any time by tapping it and tapping *Select*.



In this example, *Home 500* is selected. The heading states the previous level (*Home Line*).

Sets contain one or more data fields. You recognize a set by the plus icon on the right of the name. Tap the plus icon to add a new set and fill out the contained data fields. You can add several sets of the same type. Just tap the plus icon again. You can remove a set by tapping *Remove*.

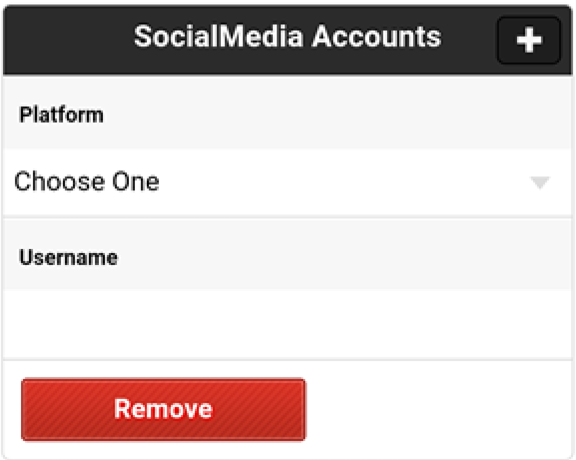


Figure 14: *Set containing two data fields*

Mandatory fields have an asterisk after the field name.

D.6 Search Ticket

You reach this screen in one of the following ways:

- Tap the *Search Ticket* tile on the *Home* screen. In this case, the Search Ticket screen allows you to search for a ticket and open its details.
- Select the *Add relation* action in the ticket details. In this case, the Search Ticket screen allows you to search for a ticket and add a relation between the current ticket and the ticket found in the search.

Please proceed as follows to search for a ticket:

1. Enter the search term in the *Search Ticket* field. You can search by ticket number (the number shown below the ticket icon) or by keyword from the ticket subject. Depending on the individual configuration of your CM system, it might also be possible to search for the values of certain ticket fields.
2. Tap the desired ticket to view its details or carry out ticket actions (see Ticket Details).

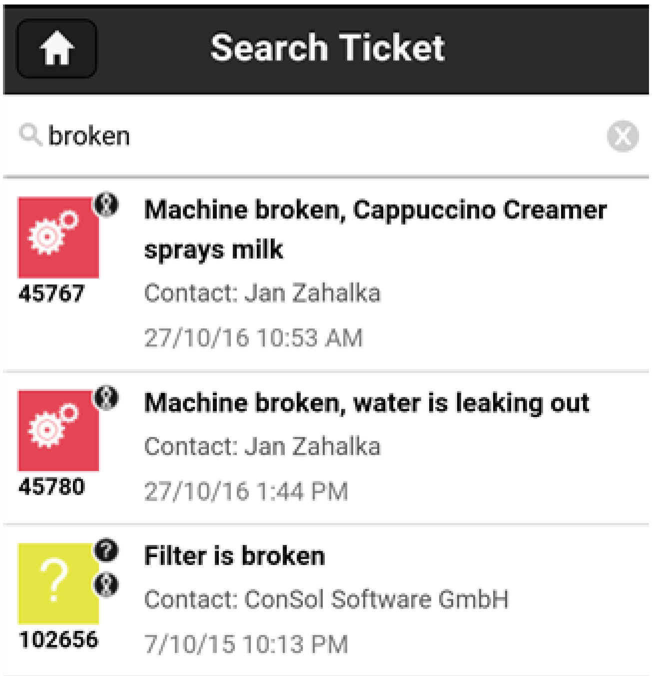


Figure 15: *Search Ticket screen*

D.7 Ticket List

This chapter discusses the following:

D.7.1 Introduction

You reach this screen by tapping the *Ticket List* tile on the *Home* screen. It allows you to see certain tickets at a glance. The ticket list serves as a to-do list for you and your team.

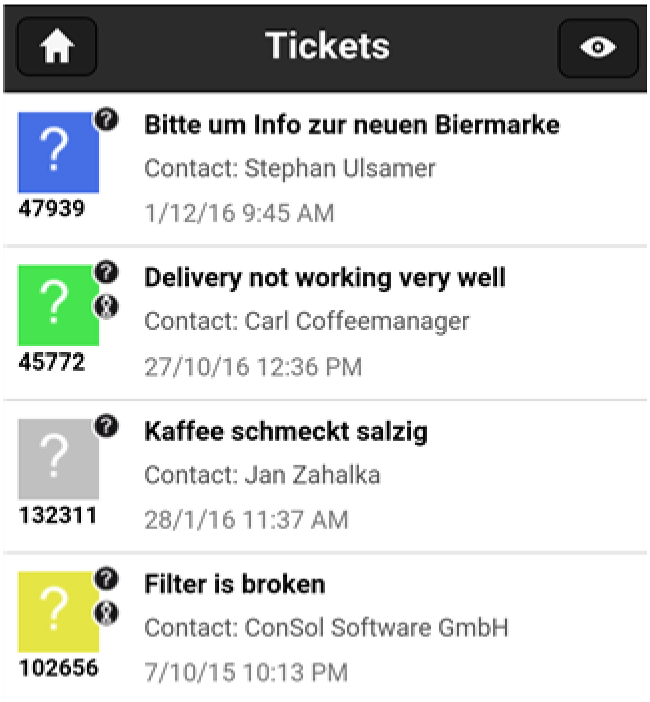


Figure 16: *Ticket list*

D.7.2 Displayed Data

The following data is displayed for each ticket in the ticket list:

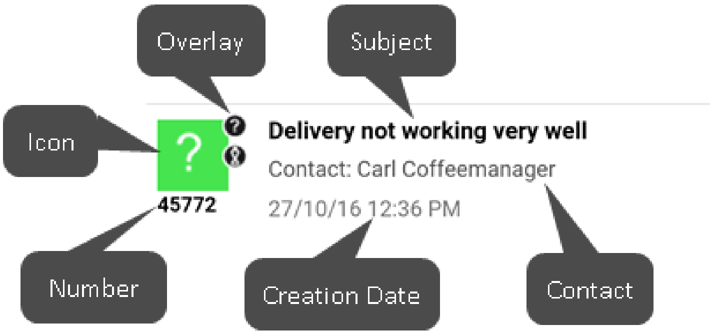
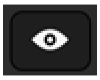


Figure 17: *Ticket entry*

D.7.3 Views

Views limit the tickets which are shown in the ticket list to those tickets matching specific view criteria. Usually, a view contains tickets from one or more queues which are in one or more scopes. Nevertheless, additional criteria, as the value of a specific ticket field, might apply.

You can change the view by tapping the following icon:



The view settings contain several selection fields.

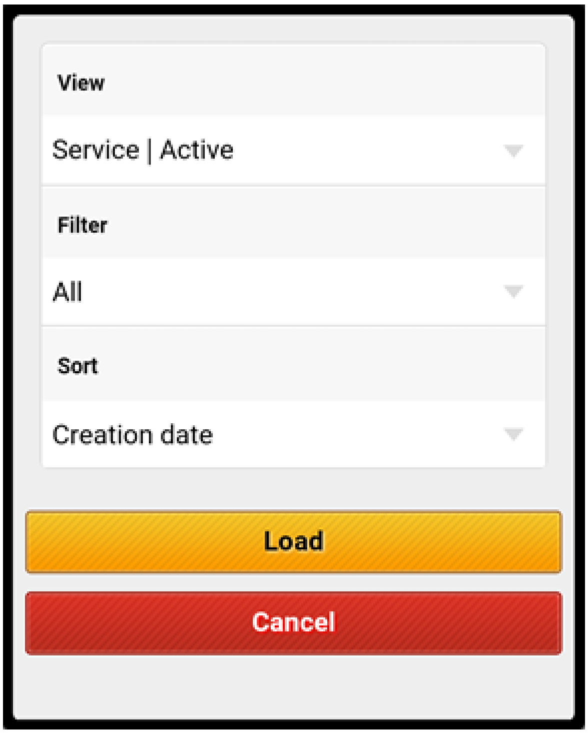


Figure 18: *View settings*

Select the desired values:

- **View:** Select one of the available views.
- **Filter:** Choose whether you want to display all tickets (*All*), tickets assigned to you (*My*) or unassigned tickets (*Unassigned*).
- **Sort:** Select the sorting (*Creation date* or *Subject*).

Tap *Load* to apply the view selection.

D.7.4 Actions

You can carry out two actions in the ticket list.

- **Open a ticket:** Tap a ticket to open its details, see Ticket Details.
- **Change the view:** Tap the view icon to select a view in order to determine which tickets should be included in the ticket list, see Views.

D.8 Ticket Details

You reach the ticket details by tapping a ticket in the ticket list, the favorites or the results of a ticket search. A ticket is divided into five screens. You can swipe to navigate between the screens.

D.8.1 Ticket Data

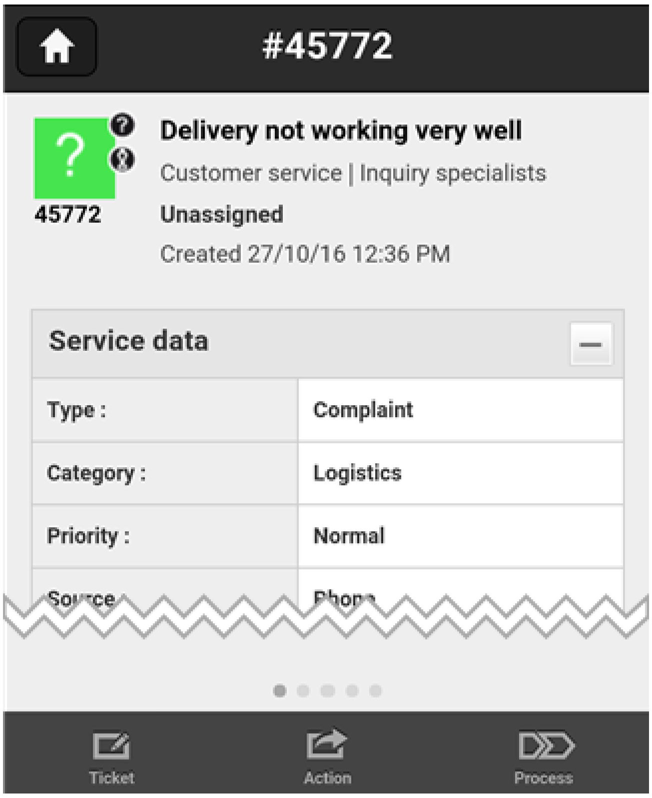


Figure 19: *Ticket data screen*

Displays: The header contains the ticket icon with its overlays (if any) and the ticket number on the left, and the subject, queue, scope, assigned engineer and creation date on the right. Below, the ticket data is shown in groups.

Possible actions: Tap the +/- icon to expand/collapse a group.

D.8.2 Contacts

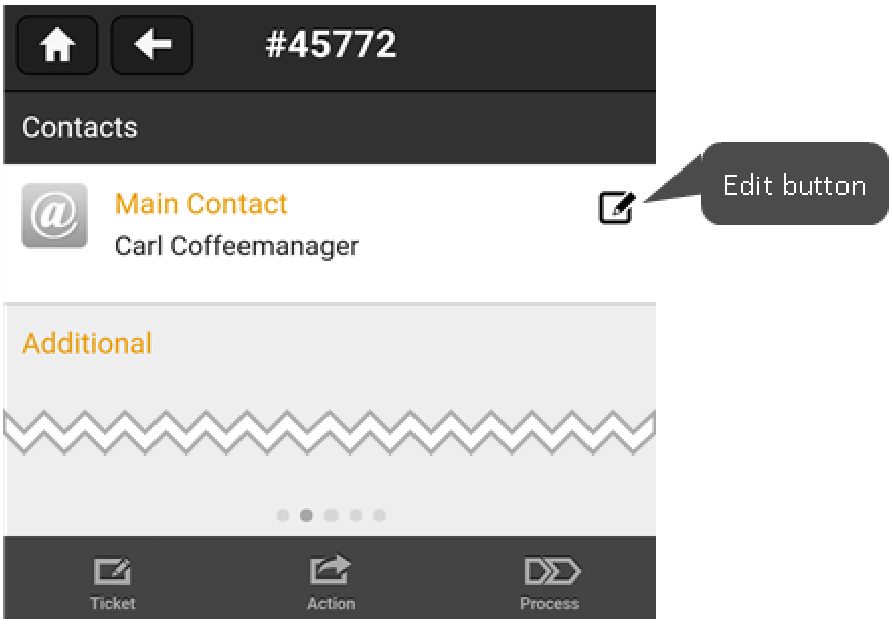


Figure 20: *Ticket contacts screen*

Displays: Main contact (mandatory) and additional contacts (optional).

Possible actions: Tap the contact to see the contact details (View Contact screen). Tab the *Edit* button to change the contact's data (see Edit Contact). To select another contact as the main contact of the ticket, please see the action Edit Contacts.

D.8.3 History

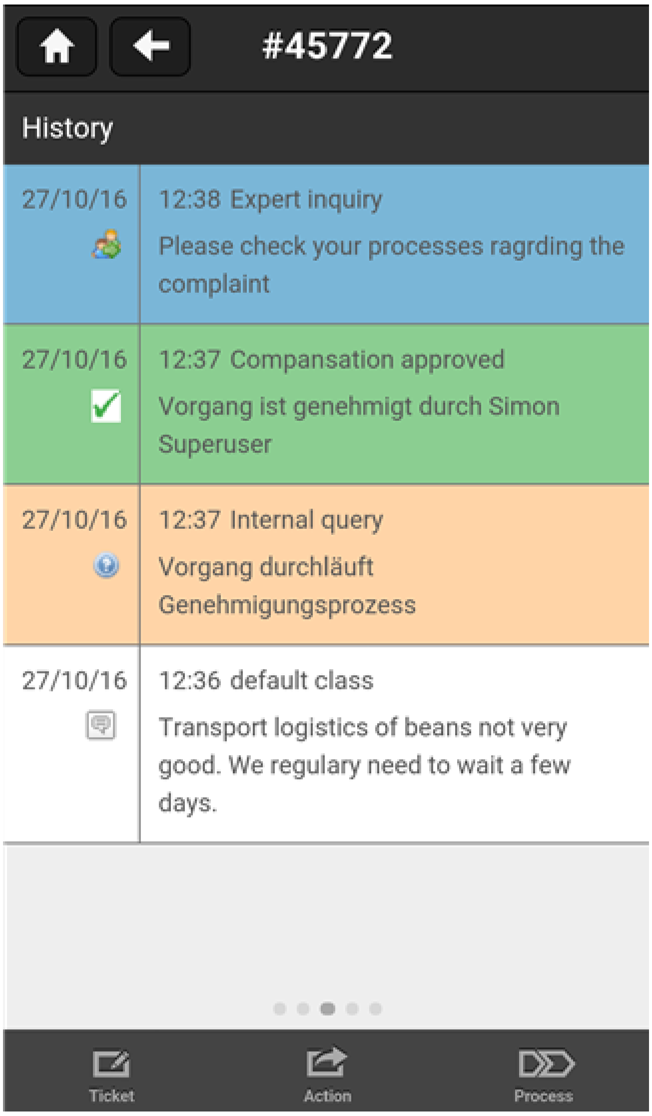


Figure 21: *Ticket history screen*

Displays: Ticket history with entries for executed workflow activities, emails, comments, approvals, and changes to ticket data. Entries include the time when the action took place and can be highlighted in a certain color.

Possible actions: None

D.8.4 Attachments

Figure 22: *Attachments screen*

Displays: Attachments added to the ticket.

Possible actions: Tap the attachment to open it.

D.8.5 Relations

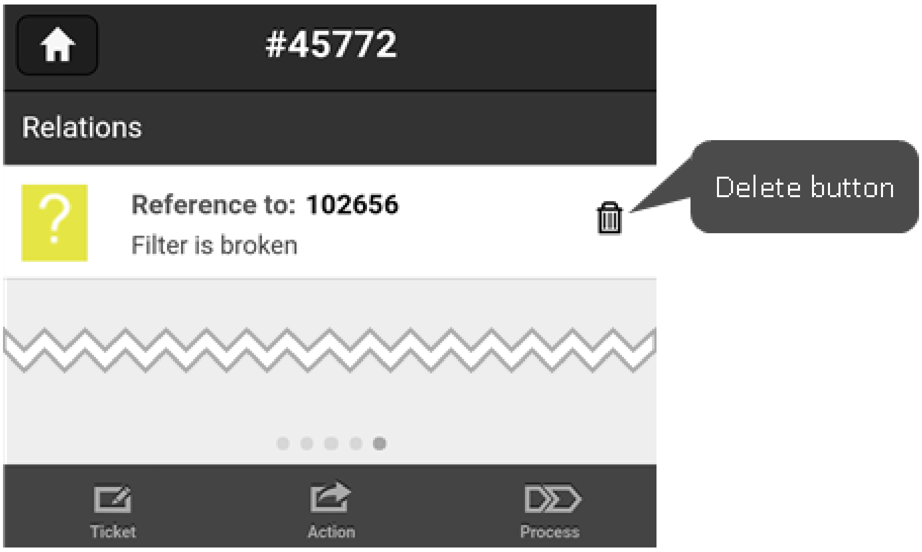


Figure 23: *Relations screen*

Displays: Related tickets (icon, relation type, ticket number, and subject).

Possible actions: Tap the related ticket to open its details. Tap the *Delete* icon to delete the relation (does not delete the ticket).

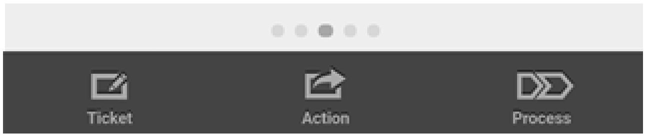
Available relation types

There a several kinds of relations:

- **Reference to:** Non-hierarchical relation. A ticket can have any number of such reference relations.
- **Master of:** Hierarchical relation. A ticket can be master of any number of slave tickets.
- **Slave of:** Hierarchical relation. A ticket can be slave of one master ticket only.
- **Parent of:** Hierarchical relation. A ticket can be parent of any number of child tickets. This relation cannot be added manually in CM/Mobile. The *Delete* button is not available.
- **Child of:** Hierarchical relation. A ticket can be child of one parent ticket only. This relation cannot be added manually in CM/Mobile. The *Delete* button is not available.

D.9 Ticket Actions

This menu is displayed at the bottom of the ticket details. It provides access to additional functions and consists of three buttons: *Ticket*, *Action* and *Process*.



D.9.1 Ticket

Shows the basic ticket actions.

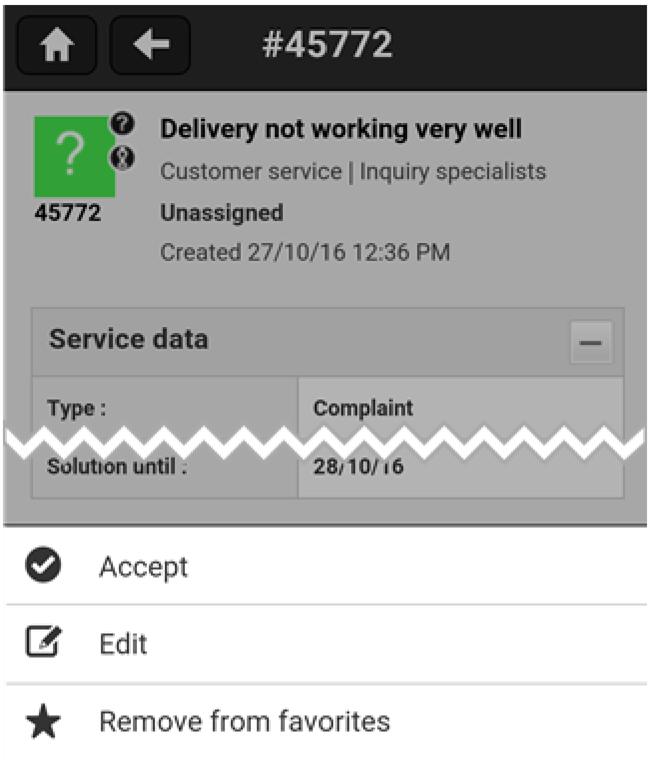


Figure 24: *Menu item "Ticket"*

- **Accept:** Assign yourself as the responsible engineer for the ticket.
- **Edit:** Change the subject, queue, assigned engineer (opens the Search Engineer screen), or edit data fields.

- **Add to favorites:** Add the ticket to your favorites.
- **Remove from favorites:** Remove the ticket from your favorites.

D.9.2 Action

Shows the additional ticket actions.

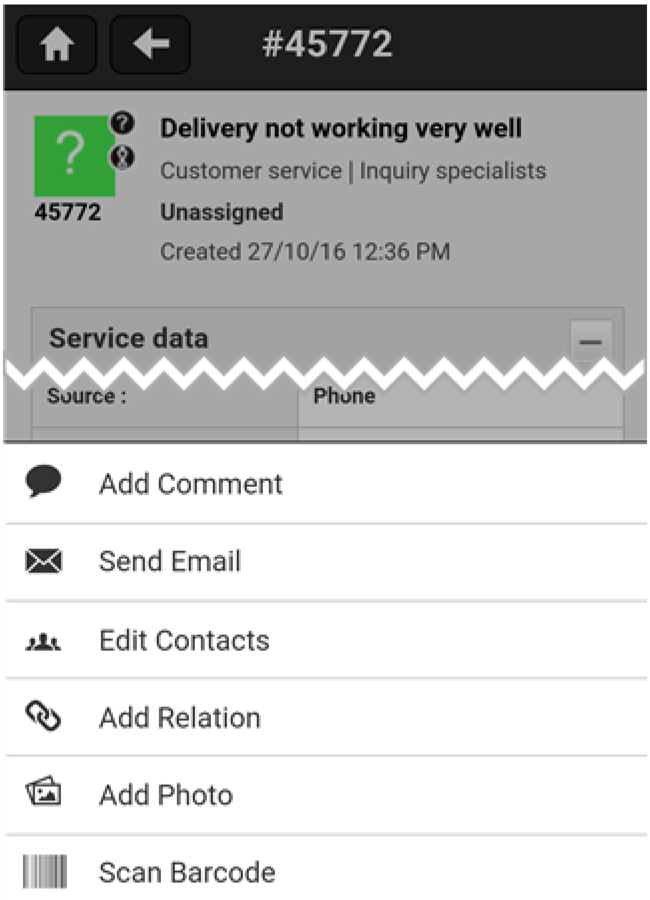


Figure 25: *Menu item "Action"*

- **Add Comment:** Write your comment and tap *Add Comment*.
- **Send Email:** Open your mail app to send an email.
- **Edit Contacts:** Opens the *Edit Contacts* screen, where you can change the main contact and add or remove additional contacts, see Edit Contacts.
- **Add Relation:** Opens the Search Ticket screen. Enter the ticket number or subject and select one of the suggested tickets. Select the type of relation (reference, master, slave) and add a note (optional). Tap *OK*.

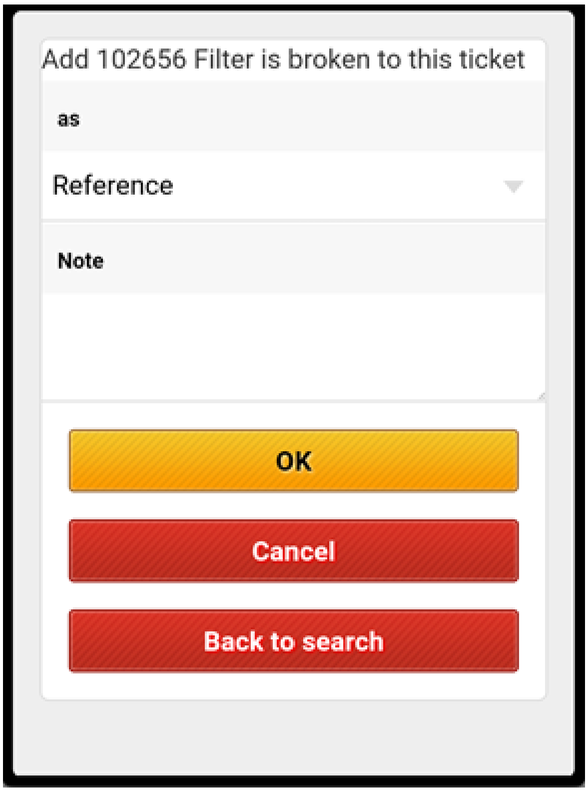


Figure 26: *Screen to add a relation*

Available relation types

You can set three kinds of relations:

- **Reference to:** Non-hierarchical relation. A ticket can have any number of such reference relations.
  Example: You can create a reference relation between two support requests concerning a similar problem.
- **Master of:** Hierarchical relation. A ticket can be master of any number of slave tickets.
  Example: You set the selected ticket as the master of the current ticket because the current ticket describes a sub-task which has to be completed before closing the selected ticket.
- **Slave of:** Hierarchical relation. A ticket can be slave of one master ticket only.
  Example: You set the selected ticket as the slave of the current ticket because the current ticket describes a comprehensive task consisting of several subtasks.

- **Add Photo:** Select a photo from your gallery or take a new one. You have to give it a name before you can add it to the ticket.

- **Scan Barcode:** Open the barcode reader.

D.9.3 Process

Shows the workflow activities which are available at this stage of the process. Carry out a workflow activity to move the ticket through the business process. The available workflow activities depend on the business process implemented in your CM system.

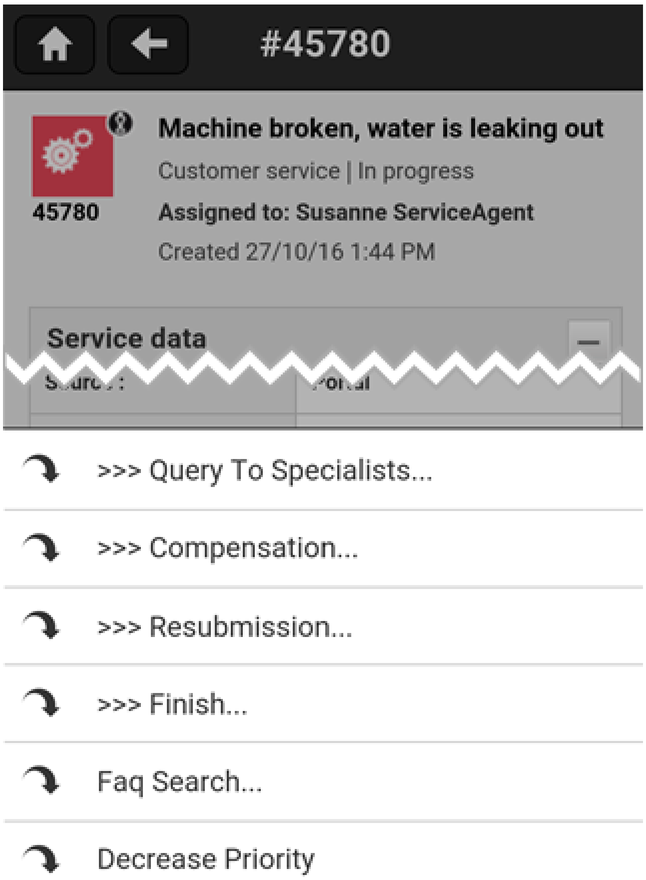


Figure 27: *Menu item "Process"*

There are two types of workflow activities:

1. **Workflow activities which are performed directly**
   These workflow activities are performed directly after you tap the respective activity. If they

involve changes to the ticket data, these changes are carried out automatically.

2. **Workflow activities which require additional input**
   These workflow activities open an additional screen called *Form*, where you have to fill out some data fields. Enter the required data and tap *Save* to carry out the activity.

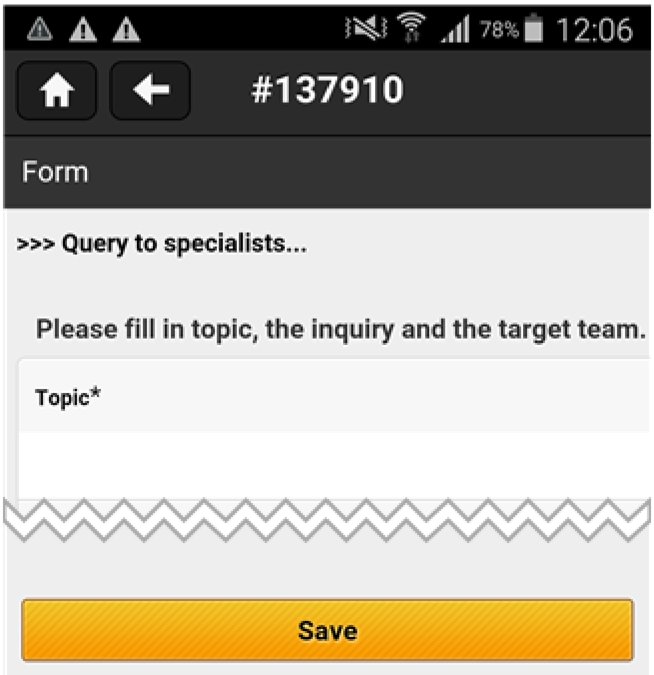


Figure 28: *Form opened after tapping a workflow activity*

D.10 Edit Contacts

You reach this screen by selecting *Edit Contacts* as a ticket action. It allows you to change the main contact and additional contacts of a ticket. You can find more information about contacts in section Contacts. To edit the contact's data, please see Edit Contact.

This chapter discusses the following:

D.10.1 Introduction

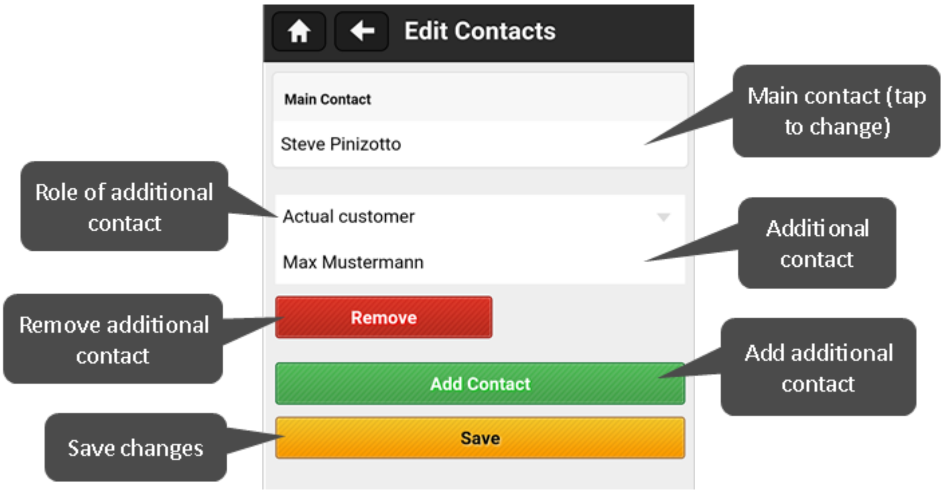


Figure 29: *Edit Contacts screen*

D.10.2 Change the Main Contact

Tap the main contact to open the Search Contact screen. Enter the name of the contact and select one of the suggestions. Tap *Save*.

You cannot remove the main contact because the main contact is mandatory.

D.10.3 Add an Additional Contact

Tap *Add Contact* to add an additional contact. Choose a role from the drop-down menu (optional). Tap the field below the role to open the Search Contact screen. Enter the name of the contact and select one of the suggestions. Tap *Save*.

D.10.4 Remove an Additional Contact

Tap *Remove* and tap *Save* to remove an additional contact.

D.10.5 Change the Role of an Additional Contact

Tap the role field, which displays either the name of the current role or *No role*, and select the desired role. Tap *Save*.

E - Contacts

This chapter discusses the following:

E.1 Definitions

E.1.1 Customers, Contacts, and Companies

Customer is the generic term which designates the person or object that gave the reason for creating a ticket. The customer represents the external side of a ticket. A ticket always needs to have a customer as main customer. A customer always belongs to a customer group. Depending on the customer data model, a customer can either be:

- A **company**
  The upper hierarchical level of a two-level customer model. A company can have several contacts.
- A **contact**
  The lower hierarchical level of a two-level customer model. A contact can only belong to one company.

> The terms company and contact have the sole purpose of illustrating the hierarchical model. A company does not have to be a real company, and a contact does not have to be a real person. They could be machines, products, or any other entity managed in ConSol CM. It depends on the individual configuration of your CM system which entities are managed as companies and contacts.

E.1.2 Customer Data Model

The customer data model is the definition of the customer. There are two types of customer data models:

- **One-level customer data model**
  Contains either companies or contacts, but not both of them.
- **Two-level customer data model**
  Contains companies on the upper hierarchical level and contacts on the lower hierarchical level.

The customer data model also determines the available data fields and possible relations. There can be several customer data models within one CM system.

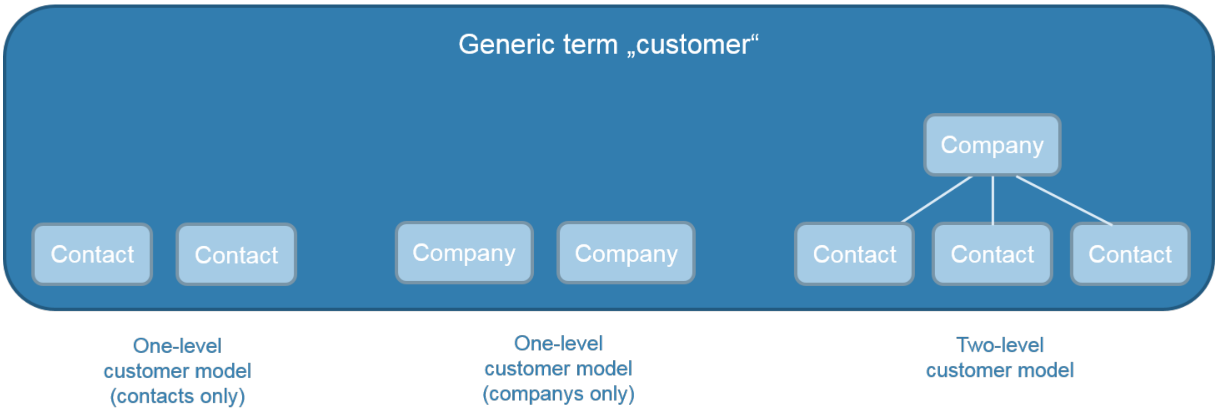


Figure 30: *Explanation of the terms: customer, company, and contact*

E.1.3 Customer Group

The real customers, which are created using the Web Client or CM/Mobile, always belong to a customer group. The customer group determines which customer data model is used for its customers, i.e., which data fields are available and which relations and activities are possible for the customers. One CM system can have several customer groups to manage different kinds of customers within the same CM system. Engineers get access to customer data by customer group. They need at least read permissions for the customer group in order to see tickets whose main customer belongs to this customer group.

> Each CM system uses customized customer groups and data models. Therefore, the available customer groups, hierarchical levels for customer objects, data fields, relations, and activities depend on the individual configuration of your CM system.

E.2 Structure of a Contact

A contact consists of one screen containing the contact (1) and company (2) data, which is described in section View Contact.

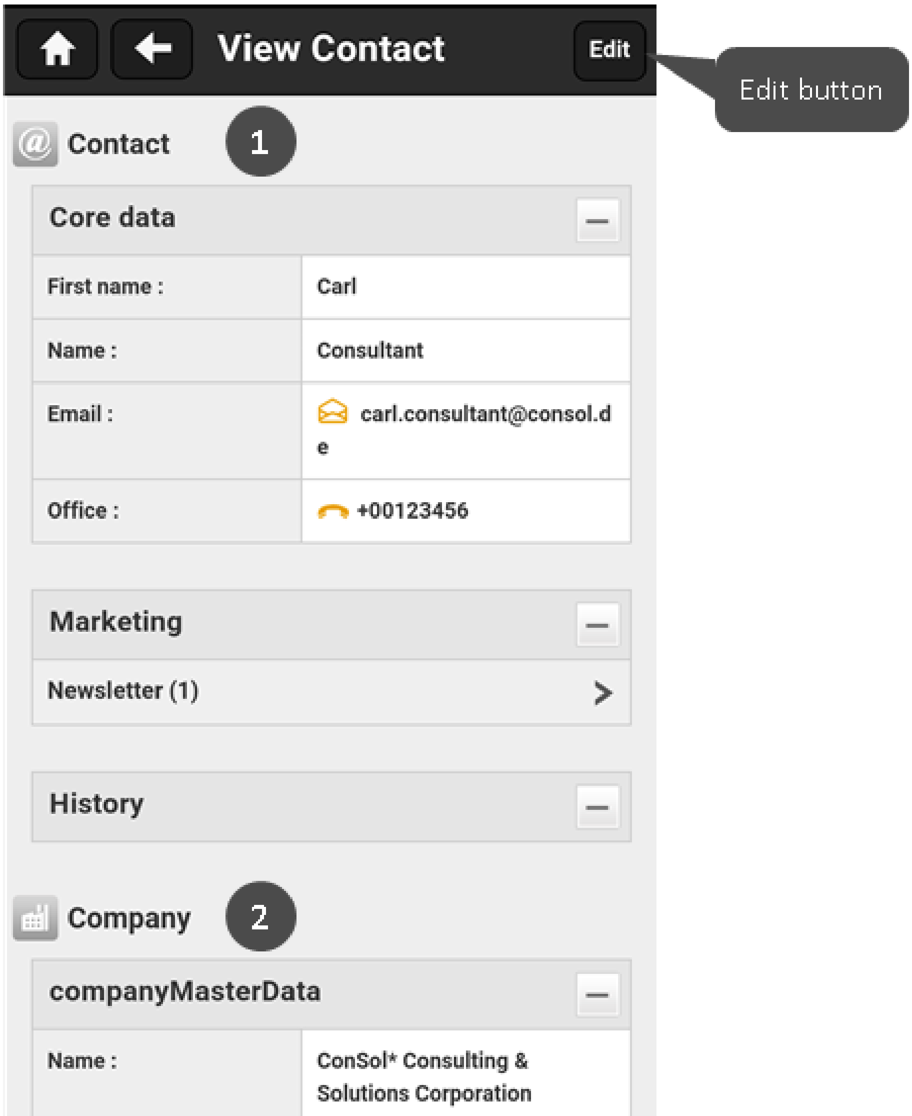


Figure 31: *Contact screen*

E.3 Accessing Contacts

There are two ways to access a contact:

1. Tap the contact on the Contacts screen of a ticket.
2. Search for a contact on the Search Contact screen.

E.4 Working with Contacts

As an engineer, you can use CM/Mobile to carry out the following actions for contacts:

- You create a new contact, e.g., because you need to open a ticket for a new customer, see section Create Contact.

- You edit the contact data to update its information, see section Edit Contact.

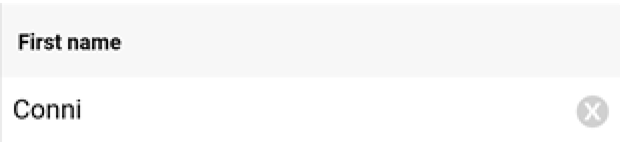
E.5 Create Contact

You reach this screen by tapping the *Create Contact* tile on the *Home* screen. It allows you to create a new contact.

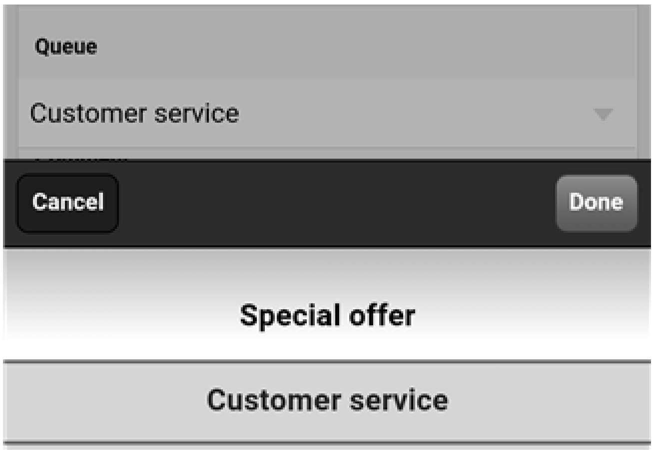
1. Select the customer group and tap *Next*.
2. Depending on the customer data model used for the selected customer group, you might have to select a company. In this case, the Search Company screen is displayed. Enter the company name and select one of the suggestions.
3. Fill out the data fields. The displayed data fields depend on the customer data model.
4. Tap *Create* to create the contact.

There are several types of data fields:

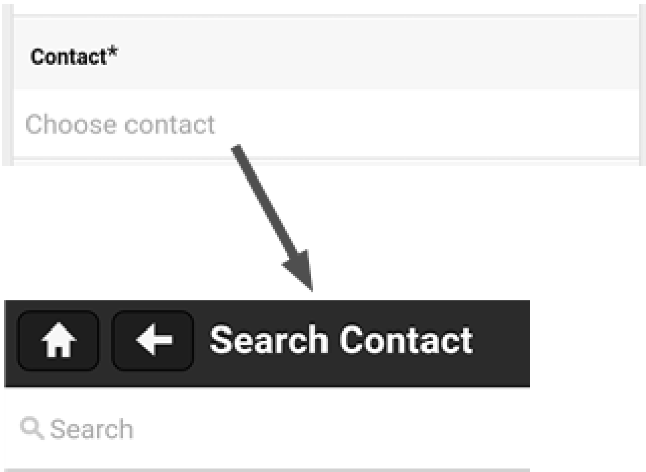
- **Text fields:** Enter the value in the blank space below the field name. Tap the little cross on the right to clear the content of a field.



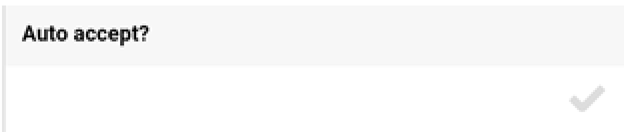
- **Selection fields:** These fields have a small arrow on the right, after the field name. Tap the field name and select a value. This can be a value from a list or a date.



- **Search fields:** These fields open a search screen, see Search Features. Enter the value on the search screen and select one of the suggestions.



- **Checkbox fields:** These fields have a checkmark on the right. Tap the field to activate it (the checkmark is displayed in a darker font). Tap again to deactivate the field.



- **Multilevel selection fields:** These fields initially look like text fields. When you tap the white space, a pop-up window opens, which allows you to navigate through a hierarchical list of entries. Tap the arrow on the right of an entry to navigate to the subordinate entries. To go back to the previous level, tap the *Back* button. You can select an entry at any time by tapping it and tapping *Select*.

In this example, *Home 500* is selected. The heading states the previous level (*Home Line*).

Sets contain one or more data fields. You recognize a set by the plus icon on the right of the name. Tap the plus icon to add a new set and fill out the contained data fields. You can add several sets of the same type. Just tap the plus icon again. You can remove a set by tapping *Remove*.

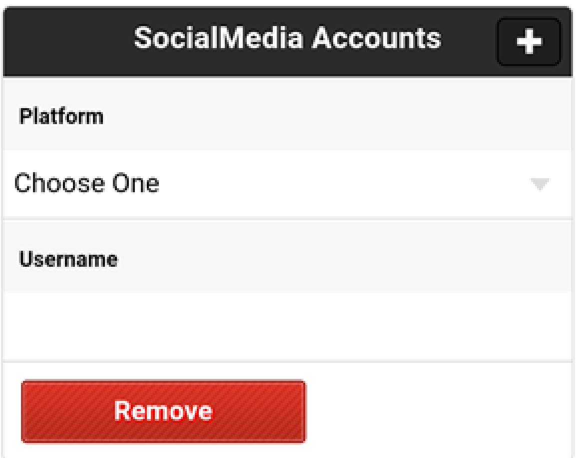


Figure 32: *Set containing two data fields*

Mandatory fields have an asterisk after the field name.

E.6 Search Contact

You reach this screen in one of the following ways:

- Tap the *Search Contact* tile on the *Home* screen. In this case, the *Search Contact* screen allows you to search for a contact and open its details.
- Select the *Edit Contacts* action in the details of a ticket. In this case, the *Search Contact* screen allows you to search for a contact and add him as the main contact or an additional contact to the ticket.

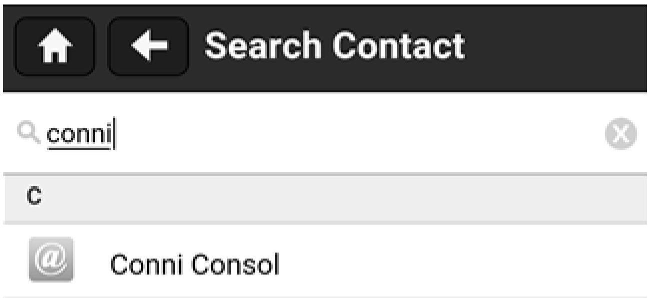


Figure 33: *Search Contact screen*

Please proceed as follows to search for a contact:

1. Enter the keywords in the *Search* field. You can search by the name of the contact or by the name of the company which the contact belongs to. Depending on the individual configuration of your CM system, it might also be possible to search for the values of certain contact fields. The matching contacts are sorted alphabetically.
2. Tap the desired contact to view his details or edit his data (see View Contact).

E.7 View Contact

You reach this screen by tapping a contact in the results of a contact search or in the ticket details. This screen allows you to view the data of the contact (1) and the company (2) it belongs to.

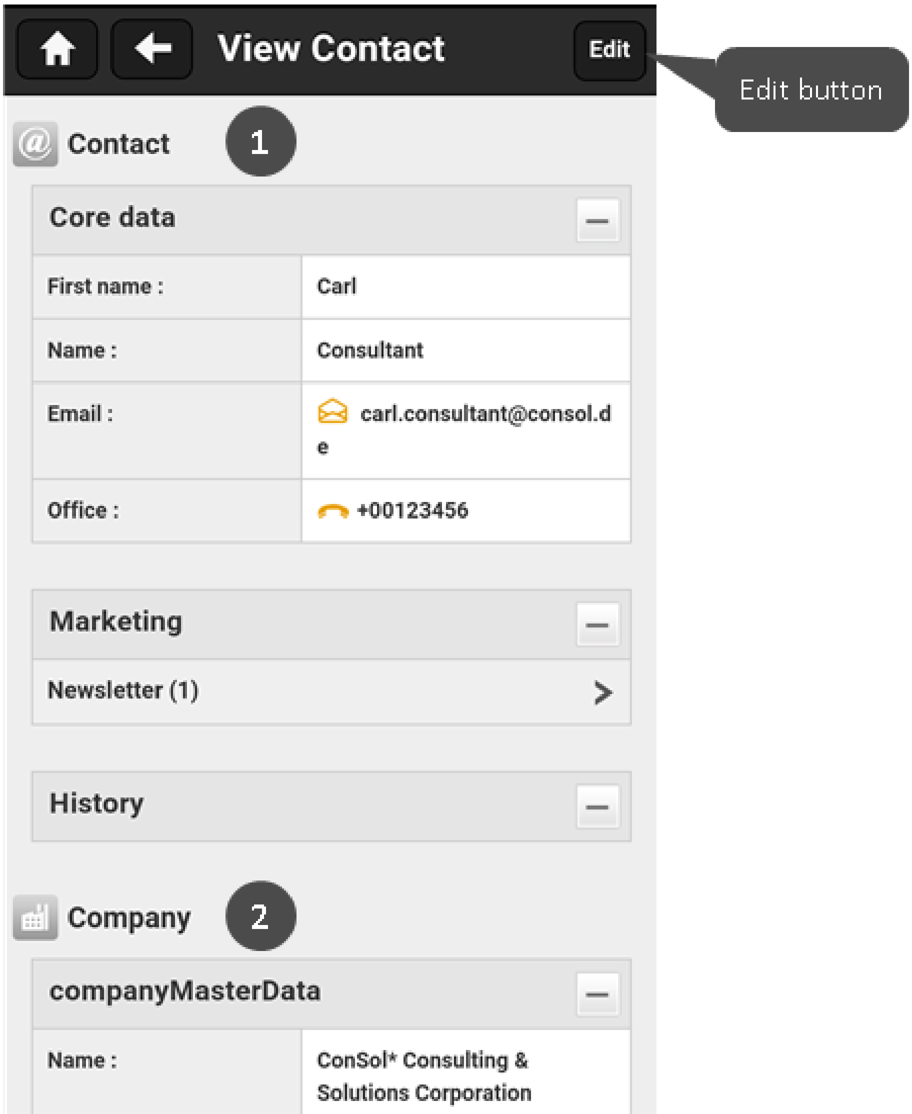


Figure 34: *View Contact screen*

The contact data is organized in groups. If a group is expanded (i.e., all data is shown) you can collapse it by tapping the minus icon in the group header. You can expand a collapsed group by tapping the plus icon in the group header.

You can tap *Edit* in the upper right corner to open the Edit Contact screen, where you can change the contact data.

E.8 Edit Contact

You reach this screen by tapping *Edit* on a contact details screen. This screen allows you to edit the contact data.

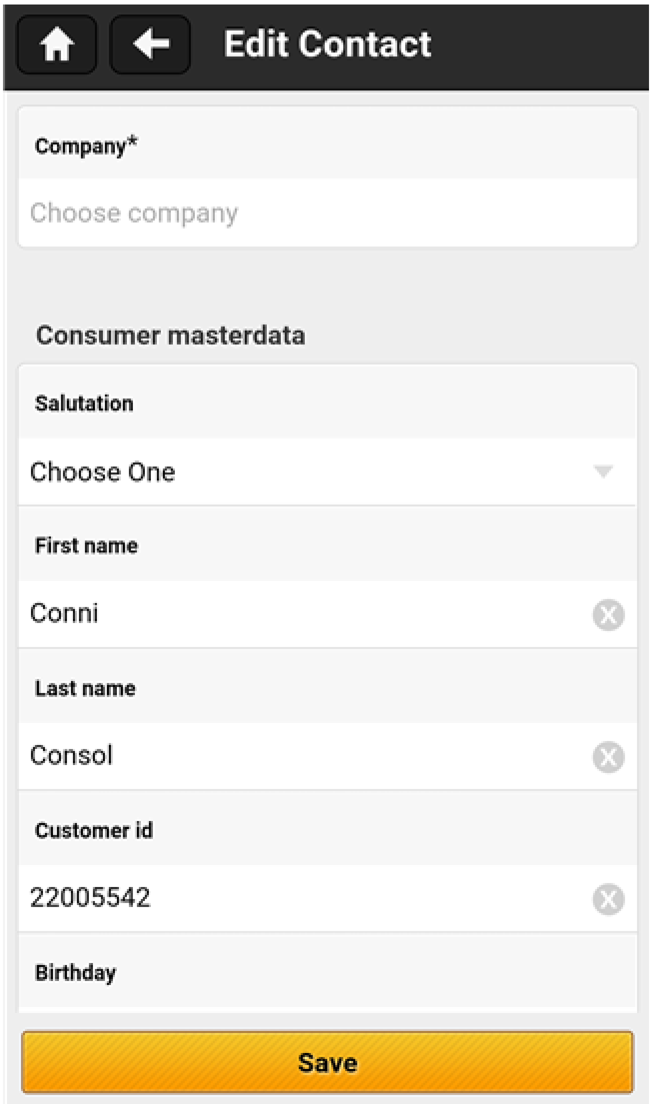
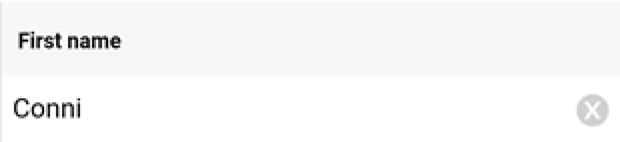


Figure 35: *Edit Contact screen*

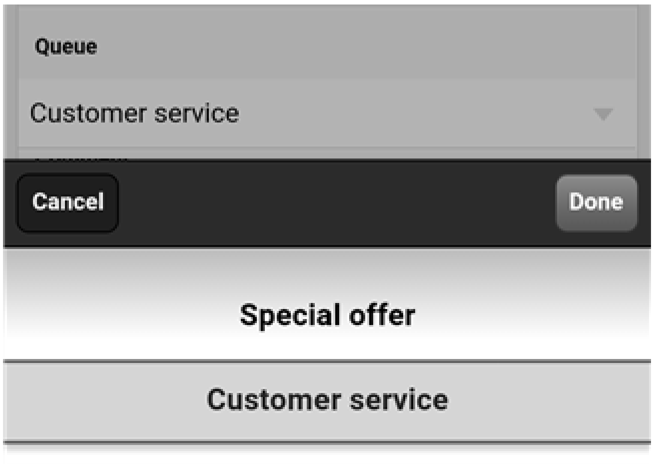
1. Change the content of the data fields as required. You can change the company which the contact belongs to by selecting a new company in the *Company* field. This opens the Search Company screen.
2. Tap *Save* to update the contact.

There are several types of data fields:

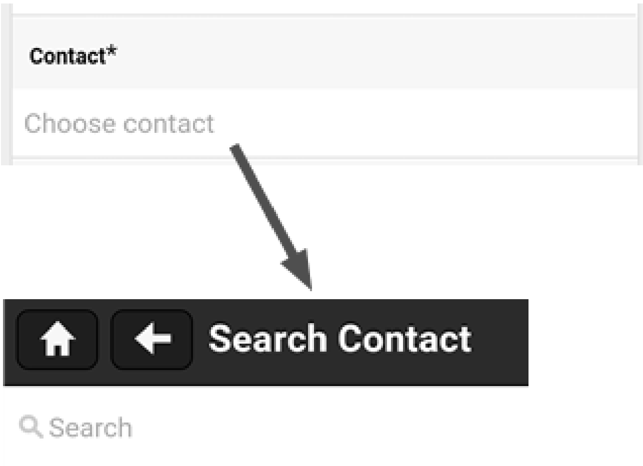
- **Text fields:** Enter the value in the blank space below the field name. Tap the little cross on the right to clear the content of a field.



- **Selection fields:** These fields have a small arrow on the right, after the field name. Tap the field name and select a value. This can be a value from a list or a date.



- **Search fields:** These fields open a search screen, see Search Features. Enter the value on the search screen and select one of the suggestions.



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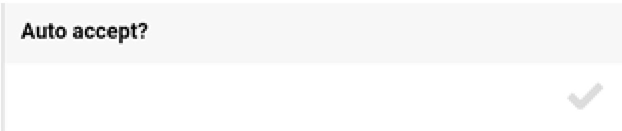
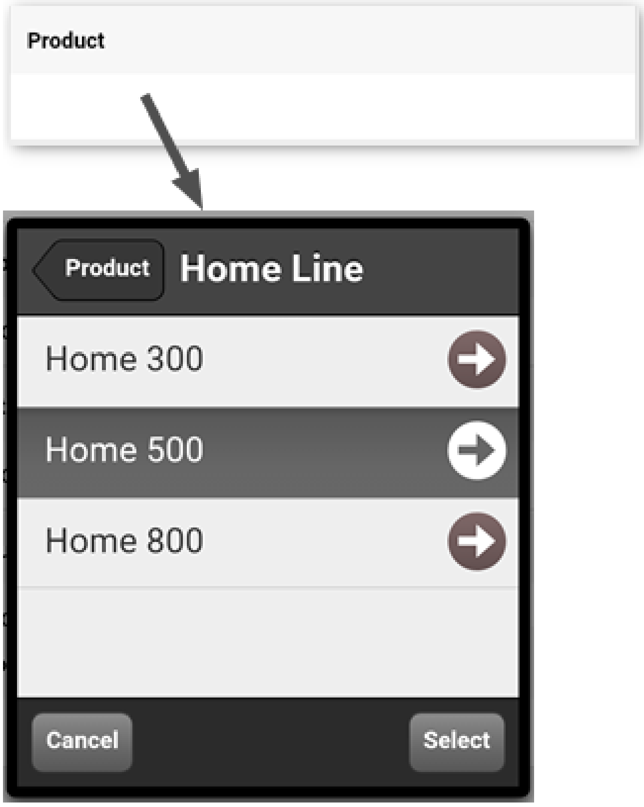


- **Multilevel selection fields:** These fields initially look like text fields. When you tap the white space, a pop-up window opens, which allows you to navigate through a hierarchical list of entries. Tap the arrow on the right of an entry to navigate to the subordinate entries. To go back to the previous level, tap the *Back* button. You can select an entry at any time by tapping it and tapping *Select*.



In this example, *Home 500* is selected. The heading states the previous level (*Home Line*).

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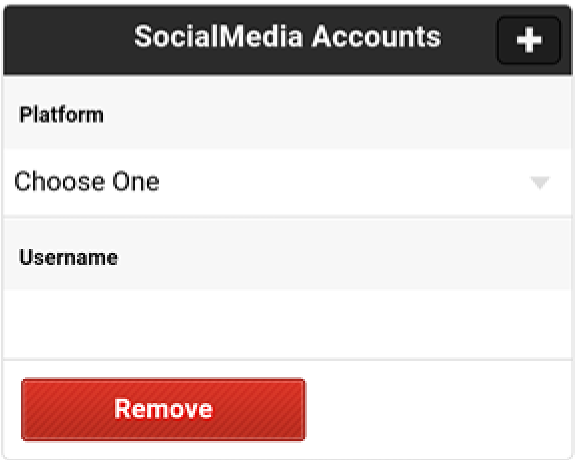

Figure 36: *Set containing two data fields*

Mandatory fields have an asterisk after the field name.