



DENTALXPAND LEARNING CENTER / WORK HUB

# Use Team Messages, Conversations, and Attachments

A complete guide to authorized direct, group, and Team conversations; role-aware contact scope; mentions and message state; current image and voice media controls; pop-outs and call handoff; soft-delete behavior; storage discipline; tenant boundaries; and safe troubleshooting.

|         |               |          |                              |
|---------|---------------|----------|------------------------------|
| VERSION | 1.0           | AUDIENCE | Authorized DentalXpand users |
| FORMAT  | Website + PDF | UPDATED  | July 2026                    |

Every person, organization, provider, patient, employee, chat, message, media item, date, status, and count shown in this guide is fictional. Never use live protected, credential, password, token, recording, unredacted third-party, or another-tenant data in training material.

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How to use this guide

Read access, contact scope, source-record discipline, and tenant boundaries first. Then practice conversation choice, concise messages, mentions, image and voice media, real-time state, calls, cleanup, and completion verification.

## 01 / PURPOSE

## Use Messages for authorized coordination, not as a shadow system of record

| Area                | Current role                                                              | Boundary                                                                                                                            |
|---------------------|---------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| Direct conversation | One authorized contact and existing direct conversation reuse             | Use only a legitimate operational contact; a name in a directory is not a broad entitlement.                                        |
| Employee group      | Purpose-led group with selected active chat-account participants          | Group membership affects who can receive conversation and notification activity.                                                    |
| Team conversation   | Employee Team context can ensure a group exists                           | Client users do not receive employee Team controls.                                                                                 |
| Current media       | Primary composer exposes image upload and microphone voice note recording | Do not promise a general file picker for arbitrary documents, PDFs, or spreadsheets.                                                |
| Operational record  | Messages coordinate next actions and context                              | Save decisions and outcomes in Tasks or the appropriate patient, payer, provider, credentialing, HR, finance, or compliance module. |

Messages does not replace source records

A sent, delivered, read, pinned, searched, or deleted message is not a substitute for an approved task state or the current owning workflow record.

## 02 / ACCESS

## Confirm current identity, organization, and contact scope before writing

| Check                            | Confirm before use                                             | Why it matters                                                                                                      |
|----------------------------------|----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| <b>Identity</b>                  | Your own current signed-in account                             | A copied browser session, media URL, screenshot, or another person's account is not permission.                     |
| <b>Organization and practice</b> | Expected tenant, organization, practice, and operating context | Messages must not bridge Guardian Connect, DentalXpand, provider, practice, client, or unrelated organization data. |
| <b>Role and membership</b>       | Legitimate need for the conversation and action                | Visible page state does not override backend authorization or row-level policy.                                     |
| <b>Client scope</b>              | Client user sees only allowed assigned DentalXpand contacts    | Client access must not become an employee directory or reveal unassigned identities.                                |
| <b>Environment</b>               | Appropriate device and private setting                         | Text, media, microphones, calls, notifications, and pop-outs can expose information beyond the intended audience.   |

Backend and tenant controls remain authoritative

Participant eligibility, row-level policy, tenant scope, storage policy, signed retrieval, and real-time delivery must be enforced by the deployed backend. Client-side filtering is a usability aid, not the sole security boundary.

[Review roles and permissions](#) | [Review organization and practice context](#)

## 03 / COMMAND CENTER

# Orient yourself in the current Messages workspace

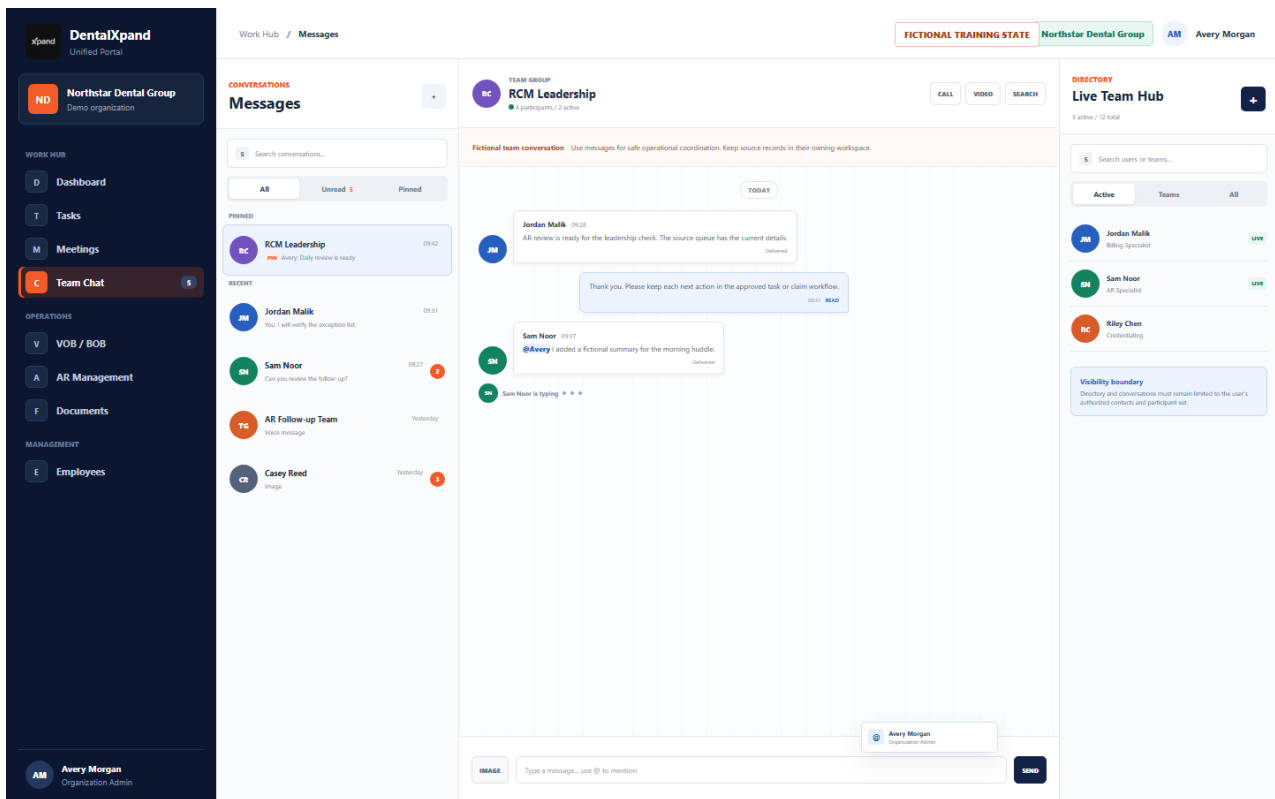


Figure 1. Fictional Messages command center with conversation list, selected group thread, unread badges, image composer control, mention suggestion, active directory, and visibility boundary note.

- 1 Use the conversation list to open a current direct, group, or Team thread.
- 2 Use unread counts and pinned conversations as personal prioritization cues, then verify important work in its owning record.
- 3 Use the current thread header to confirm the conversation type, participant context, and available actions before writing.
- 4 Search and directory results should remain constrained to the legitimate scope of the signed-in user.
- 5 Use the composer for concise context and next action, not passwords, credentials, protected records, or broad exports.

## 04 / CONVERSATIONS

# Choose direct, group, and Team containers deliberately

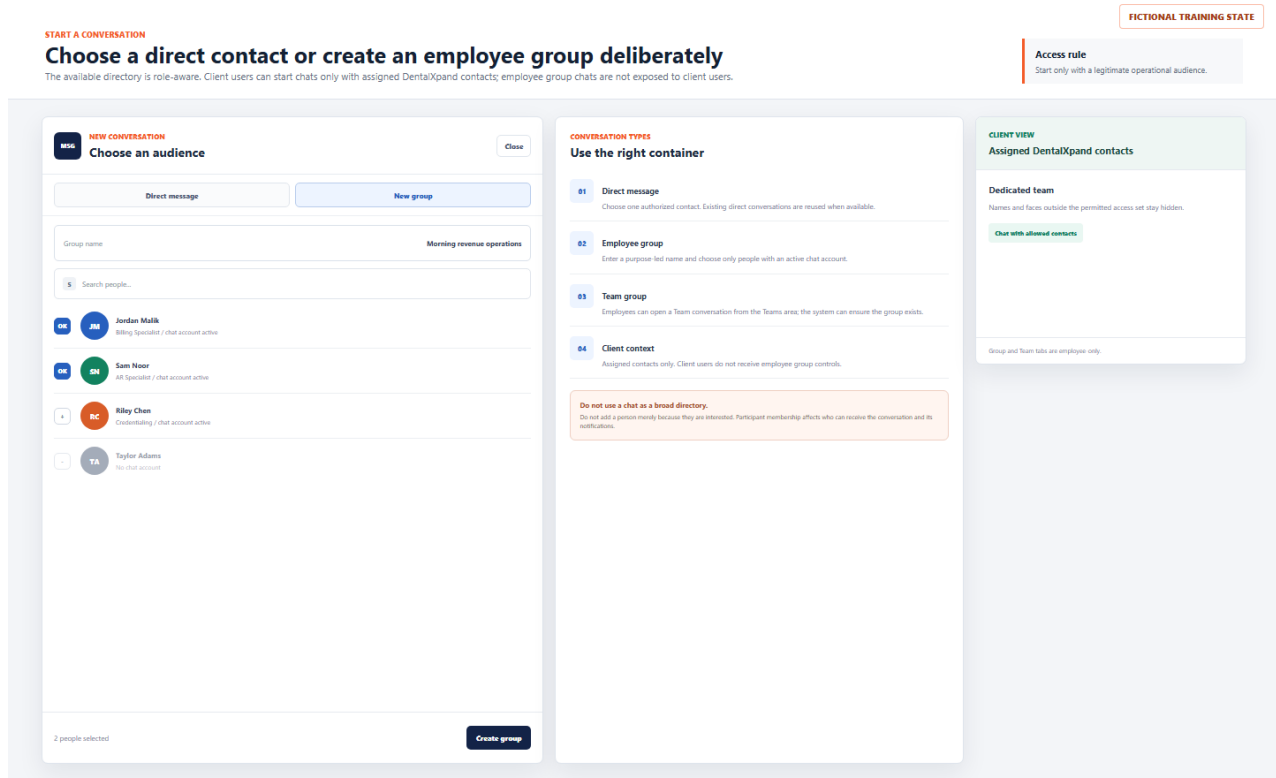


Figure 2. Fictional new-conversation flow with direct and group modes, specific group name, active chat-account contacts, Team conversation explanation, and client access scope.

| Conversation type     | Use it when                                                                   | Do not do this                                                                                              |
|-----------------------|-------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| <b>Direct message</b> | One authorized person needs a concise operational update or response.         | Do not message an unassigned contact or use direct chat to work around a missing group or role restriction. |
| <b>Employee group</b> | Multiple active account holders need the same purpose-led operational thread. | Do not add an observer merely because they may be interested or because a broad group is convenient.        |
| <b>Team group</b>     | The conversation belongs to a legitimate employee Team context.               | Do not use Team conversations to bypass client scope or create a broad cross-function data channel.         |
| <b>Client context</b> | An allowed client user communicates with assigned DentalXpand contacts.       | Do not infer access to employee groups, team lists, unassigned names, or faces.                             |

Participant changes are meaningful

Creating or expanding a participant set can change who receives messages and notification activity. Confirm the smallest legitimate audience before completing the action.

## 05 / COMPOSE

# Write clear messages, use mentions carefully, and interpret state

## COMPOSE, MENTION, AND TRACK

## Send clear operational updates without turning chat into the source record

Text messages support optimistic sending, participant mentions, typing presence, search, and sent/delivered/read state. Recheck the owning workflow for any official decision.

FICTIONAL TRAINING STATE

## Message rule

Keep content minimal and action-oriented.

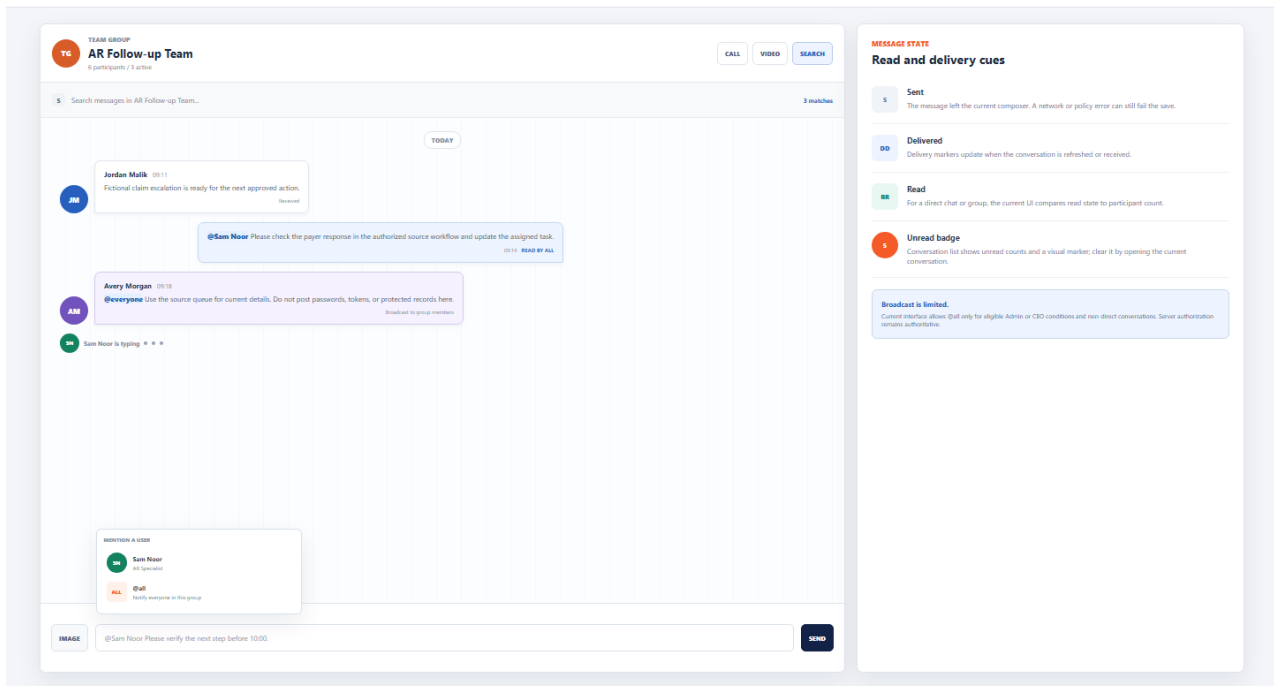


Figure 3. Fictional team conversation with message search, participant mentions, an eligible group broadcast example, typing presence, and sent, delivered, read, and unread state cues.

| Visible state       | What it can mean                                                               | Correct interpretation                                                          |
|---------------------|--------------------------------------------------------------------------------|---------------------------------------------------------------------------------|
| <b>Sent</b>         | The composer submitted a message request.                                      | Network, policy, or save failure can still prevent the intended stored state.   |
| <b>Delivered</b>    | Conversation delivery markers have updated.                                    | Delivery is not proof that the recipient read, approved, or completed work.     |
| <b>Read</b>         | Current direct or group read state compares to the relevant participant state. | Read is not an operational approval, decision, or task completion.              |
| <b>Unread badge</b> | Current conversation-list unread activity is present.                          | Open the current thread, then check the source workflow for important work.     |
| <b>Typing</b>       | A participant has recently published a transient typing state.                 | Do not infer content or wait indefinitely for a message that has not been sent. |

### Compose deliberately

Write only the minimum useful context, owner, and next action. Use @ for a legitimate participant. The current interface exposes @all only in eligible Admin or CEO conditions for non-direct conversations, and server-side authorization remains authoritative. Search and pins help navigation; neither changes membership, retention, or source authority.

06 / MEDIA

# Use the current image and voice media controls safely

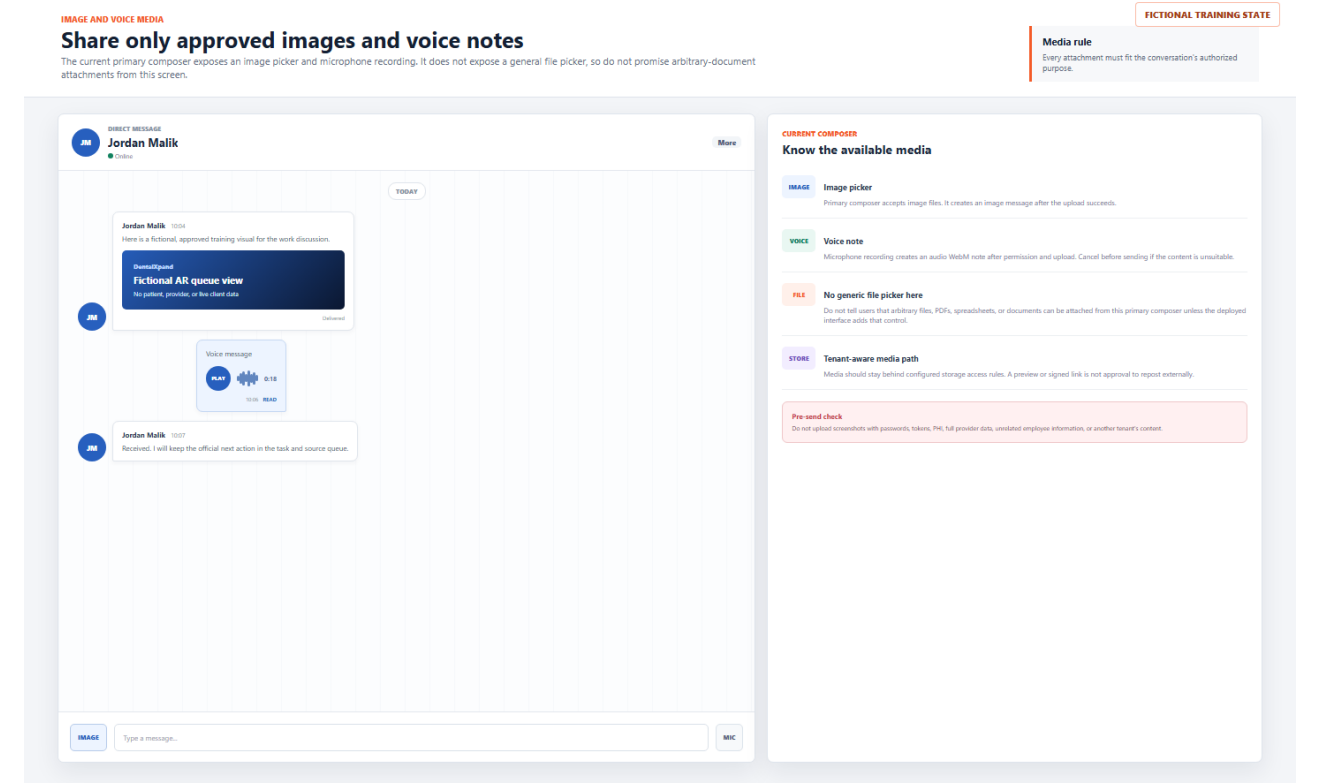


Figure 4. Fictional direct chat with an approved image message, playable voice note, image and microphone composer controls, and a current-media boundary panel.

| Control             | Current behavior                                                                                                   | Required discipline                                                                                                                  |
|---------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| Image picker        | Primary composer accepts image files and sends an image message after upload succeeds.                             | Check every image for passwords, tokens, protected information, unrelated employees, provider data, or another tenant before upload. |
| Voice note          | Microphone permission and MediaRecorder create an audio WebM item that is uploaded and played in the conversation. | Record only in a private suitable setting. Cancel before send if content is unsuitable.                                              |
| Generic file picker | The reviewed primary Messages composer does not expose a general file picker.                                      | Do not promise arbitrary PDF, spreadsheet, document, or file attachments from this screen.                                           |
| Media retrieval     | Media should use tenant-aware storage policy and configured signed retrieval.                                      | A preview or URL does not grant permission to forward, download, repost, or store it outside the approved tenant.                    |

**Pre-send media check**

If you cannot confirm that every legitimate participant may receive the media, do not upload or record it. Use the authorized Documents workflow when that is the correct record path.

07 / REALTIME

# Keep current conversation context while using calls and pop-outs

REALTIME, CALLS, AND POP-OUTS

## Keep active conversation context while using real-time collaboration controls

Messages subscribes to current conversations, messages, and typing state, with polling fallback. Direct chat audio/video calls and scheduled Meetings are related but distinct flows.

FICTIONAL TRAINING STATE

Stay current

Notifications and timestamps are alerts, not the source record.

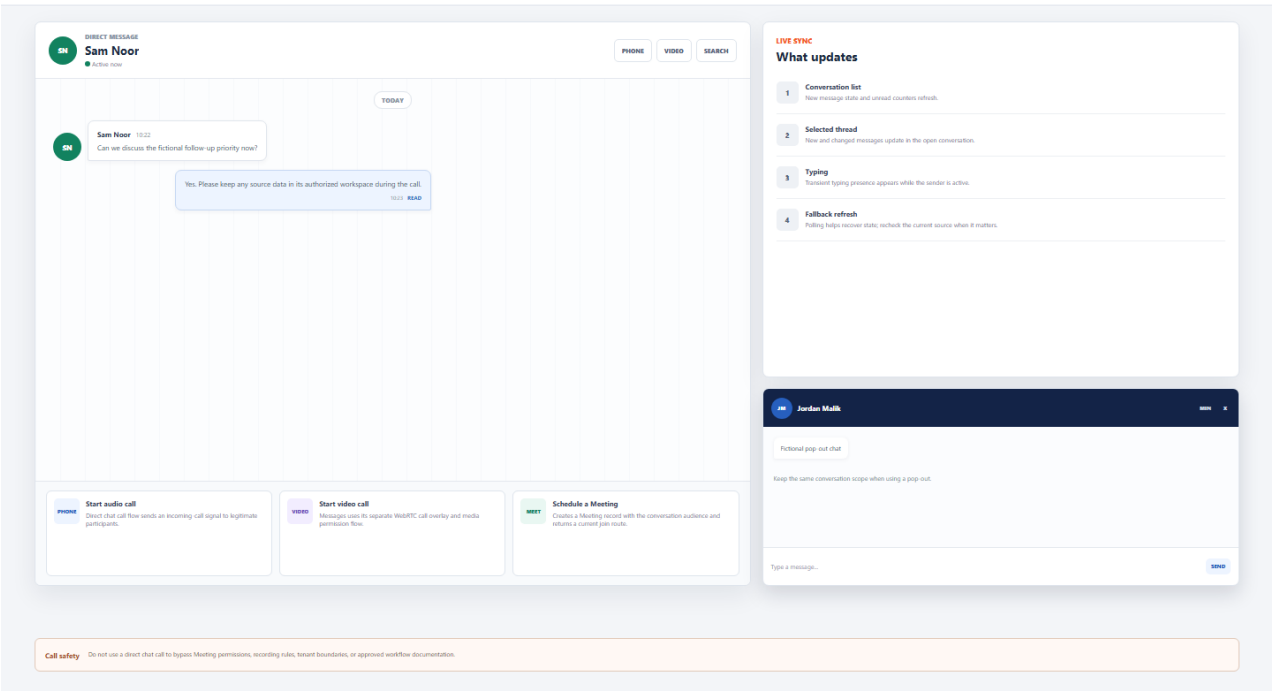


Figure 5. Fictional direct chat with real-time refresh states, audio and video call actions, Meeting scheduling action, pop-out chat, and a call safety notice.

| Feature            | Current behavior                                                                                          | Boundary                                                                                                      |
|--------------------|-----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|
| Real-time updates  | Messages subscribes to conversation, message, and typing updates, with polling fallback.                  | Notifications and fresh-looking UI are cues. Recheck the source record when accuracy matters.                 |
| Direct chat call   | Audio and video actions launch a separate Messages WebRTC call flow for a legitimate direct chat.         | Do not assume its controls, permission handling, or recording behavior match Meetings.                        |
| Schedule a Meeting | Meeting action can create a Meeting record for the conversation audience and return a current join route. | Meeting identity, status, membership, and live-room controls still apply.                                     |
| Pop-out chat       | A pop-out keeps a current conversation available while working elsewhere.                                 | It preserves the same conversation scope. It is not a way to evade membership or broaden the desktop context. |

[Review Meetings](#) | [Review video, audio, and screen sharing](#)

08 / RECORD DISCIPLINE

# Keep decisions in the right workflow and understand reply expectations

| Topic           | Current understanding                                                                                                                                                                                                                    |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Source record   | Use Messages for coordination. Record ownership, deadlines, task completion, claims, patient work, provider work, credentialing, HR, finance, and compliance outcomes in the proper authorized module.                                   |
| Task follow-up  | Create or update a structured task when someone owns the next action. Do not leave the only meaningful state inside a chat sentence.                                                                                                     |
| Reply reference | The message data model can carry a reply reference, but a dedicated reply composer control is not exposed in the reviewed primary Messages UI. Until it exists, write a brief contextual message and point to the current source record. |
| Search          | Search filters visible conversation text and is a navigation aid. It is not proof that every historical, deleted, inaccessible, or policy-restricted message is available or should be used.                                             |

No shadow systems of record

Do not use chat as the only place for material decisions or outcomes. Move consequential work to Tasks or the correct authorized record while it is current.

Continue to Tasks | Use the Dashboard command center

## 09 / CLEANUP

# Understand soft deletion and clear-history behavior

## PRIVACY, DELETION, AND TENANT BOUNDARIES

## Keep conversation access, storage, real-time updates, and cleanup inside the right scope

Participant membership, backend and row-level enforcement, storage policy, and tenant isolation must be authoritative. Browser filtering or a visible chat card is not a security decision.

## FICTIONAL TRAINING STATE

## Incident rule

Wrong-tenant data means stop, avoid more access, and report.

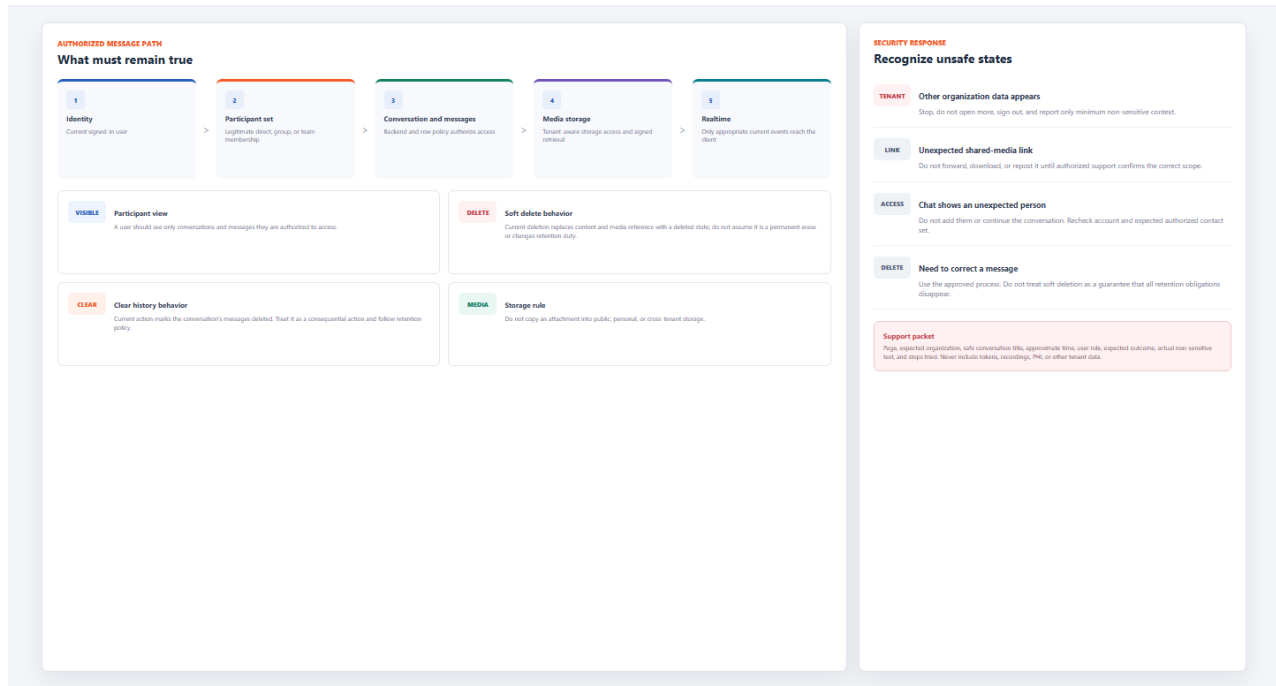


Figure 6. Fictional privacy and tenant-boundaries view with authorized message path, participant visibility, current soft-delete and clear-history rules, storage boundary, and incident response.

| Action                            | Reviewed current behavior                                                                                                    | Do not assume                                                                                                        |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|
| <b>Delete message</b>             | Service soft-deletes the message, replaces content with a deleted state, clears the media reference, and updates the record. | Permanent erasure from every database, backup, retention process, export, legal hold, recipient, or required record. |
| <b>Clear history</b>              | Current action marks the conversation's non-deleted messages deleted.                                                        | That history clearance removes organizational retention, audit, incident, or legal duties.                           |
| <b>Correct unsuitable content</b> | Use the available approved action and then fix source-record impact when needed.                                             | A soft delete hides every downstream consequence or makes a material operational issue disappear.                    |
| <b>Storage concern</b>            | Stop forwarding, downloading, or reposting and use the incident process.                                                     | A signed or previewable URL authorizes external sharing.                                                             |

10 / TENANT SECURITY

# Keep access, storage, and real-time delivery in the right scope

| Boundary                               | What must remain true                                                                                                                                 |
|----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| Identity                               | The current signed-in user starts the action with their own active session.                                                                           |
| Participant eligibility                | Only legitimate direct, group, or Team membership should be eligible for the conversation.                                                            |
| Conversation and message authorization | Backend and row-level controls, not visible client state alone, must authorize reads and writes.                                                      |
| Media storage                          | Tenant-aware policy and configured signed retrieval must protect image and voice media.                                                               |
| Real-time delivery                     | Only appropriate current events should reach the client. Polling and subscriptions do not replace authorization.                                      |
| Support                                | Only minimum non-sensitive diagnostic context should be shared; never share tokens, passwords, protected media, recordings, or another tenant's data. |

Wrong-tenant data is a security incident  
If an unexpected organization, patient, provider, practice, client, employee, thread, attachment, notification, call, or AI detail appears: stop, do not open more, do not forward or download it, sign out, and report immediately with minimum non-sensitive context.

## 11 / TROUBLESHOOT

## Resolve expected states without guessing or bypassing access

| What you see                        | Possible reason                                                                                         | Correct first response                                                                                                                 |
|-------------------------------------|---------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| <b>Cannot start direct chat</b>     | Contact is out of scope, has no active chat account, session is stale, or policy denies action.         | Confirm current identity, organization, expected contact set, and safe error text. Do not borrow access or create an unapproved group. |
| <b>Group or Team option missing</b> | Client user boundary, employee eligibility, or missing legitimate Team context.                         | Respect the role boundary and ask the responsible authorized employee or administrator to confirm the correct path.                    |
| <b>Message does not send</b>        | Network, session, conversation, policy, or storage issue.                                               | Check the current thread and safe error feedback, then retry only with your own active authorized account.                             |
| <b>Image or voice upload fails</b>  | File type, microphone permission, browser support, storage, connectivity, or policy issue.              | Remove unsuitable content, confirm safe local permissions and file selection, then report the non-sensitive state if it persists.      |
| <b>Status looks stale</b>           | Real-time connection, fallback refresh, session state, or another participant's activity differs.       | Refresh the current thread and check the source workflow. Do not infer task completion from a state cue.                               |
| <b>Call unavailable or fails</b>    | Conversation type, membership, browser media permission, WebRTC, or live-service state.                 | Recheck conversation scope and use the approved Meeting workflow when appropriate. Do not use unapproved external calls.               |
| <b>Other tenant data appears</b>    | Potential participant, API, row policy, storage, cache, notification, search, AI, or isolation failure. | Stop, avoid further access, sign out, and report a security incident.                                                                  |

## 12 / COMPLETION

## Verify that team messaging is understood

- I can confirm my own account, organization, practice, role, and expected conversation context before opening Messages.
- I choose a direct, employee group, or Team conversation only for the smallest legitimate audience.
- I understand client users can use only allowed assigned DentalXpand contacts and do not receive employee group or Team controls.
- I can write concise action-oriented messages, use mentions correctly, and keep official decisions in Tasks or the owning module.
- I know sent, delivered, read, unread, typing, pin, and search states are collaboration cues, not source-record proof.
- I know the reviewed primary composer supports image upload and voice notes but does not expose a generic file picker for arbitrary documents.
- I understand direct chat calls, scheduled Meetings, and pop-out chats are related but separate experiences with their own current controls and boundaries.
- I understand current delete and clear-history actions use soft-delete behavior and do not erase retention duties by default.
- I know backend authorization, row-level policy, participant eligibility, tenant scope, storage policy, and real-time delivery must remain authoritative.
- I can identify a wrong-tenant or unexpected-data state and stop, sign out, and report it immediately with minimum non-sensitive context.

Ready for notification training

Next, learn to manage notifications, reminders, and push alerts without treating a notification as proof that the underlying source record is current.

13 / CONTINUE

# Continue through DentalXpand learning

| Tasks guide | Meetings guide | All resources |
|-------------|----------------|---------------|
| Tasks guide | Meetings guide | All resources |

## Related lessons

- Use the Dashboard command center
- Navigate sections and pin frequent tools
- Understand roles, permissions, and access boundaries
- Understand organization and practice context
- Use video, audio, and screen sharing
- Manage notifications, reminders, and push alerts

**Website guide:** Use team messages, conversations, and attachments  
**Support:** support@xpand.dental  
**Website:** xpand.dental