Connecting Software

CB Mobile CRM – iPad

User Manual

Summary

This document describes the iOS app Mobile CRM, its functionality and features available. The document is intended for end users as user manual to provide basic knowledge about the app and its usage.

Document History

Version	Date	Author	Changes
1.0	2014-07-14	MTO	Document creation
1.1	2015-06-17	MBE	Design adaption

Table of Contents

1 Overview

The Connect Bridge Mobile CRM application was developed to allow the users fast and easy access to Microsoft Dynamics CRM data without the need for a PC. The application takes advantage of the currently available devices running iOS operating system (iPad, iPhone, iPod).

This document provides a general overview of the application and it's functionality. The content of this user manual is subject to change by the company without notice.

2 Intended audience

The document is intended to provide guidance to the users on how to use the application.

3 Requirements

In order to be able to run the application, the user needs a device running iOS operating system with access to iTunes. There is no other specific requirement on the hardware, all devices running iOS operating system should be able to run the application.

3.1 Minimal recommended device configuration

To ensure that the application runs smoothly try to use a device that meets the recommended requirements. The application supports all devices capable of running iOS 6 or later. The app supports any iPad capable of running iOS 6 or later.

4 Installation

To install the app, visit iTunes and start typing the app name into the search box. In the list of apps find the CB Mobile CRM app and tap on the app to view the details. Tap on the install button from the menu. The app is going to be downloaded and installed into the device.

5 Updating the app

In order to be able to update the app, the app has to be installed on the device already. The iTunes store will inform the user about available update for the CB Mobile CRM application. The update is managed by apple store (iTunes) and should start automatically when the user enabled this functionality or manually when the user chooses to update the app from the store.

6 Memory and disk space requirements

Mobile CRM app uses a local database file stored in the devices isolated storage. To ensure all data are successfully stored into the database file during synchronization operation, the device must have enough free space. It is recommended to have at least 512 Mb of disk space available on the device.

7 Security

7.1 Isolated storage

7.1.1 What is isolated storage?

Isolated Storage is used to store local data a on a device running iOS. All I/O operations are restricted to isolated storage and do not have direct access to the underlying operating system file system, which helps to provide security and prevents unauthorized access and data corruption from other applications.

7.2 Web service security

The web service communicates with the server via https and is secured by SSL certificate. Also the credentials are checked when trying to connect to the Connect Bridge server. Without a proper authentication an error message will be returned and any other attempt to communicate with the server will result in error until a successful connection is established.

7.3 Application security

Mobile CRM application uses Connect Bridge and Connect Bridge Web service in order to connect to CRM server specified by the user. To be able to connect to the Connect Bridge server a proper user name and password has to be supplied. This credentials are checked by the Connect Bridge server each time the application is trying to get or submit any user data to the CRM server.

The application also uses the devices isolated storage to store a local database and any other files used by the Mobile CRM application. Only the Mobile CRM application has access to the part of the storage where local database and any other files used by the app reside.

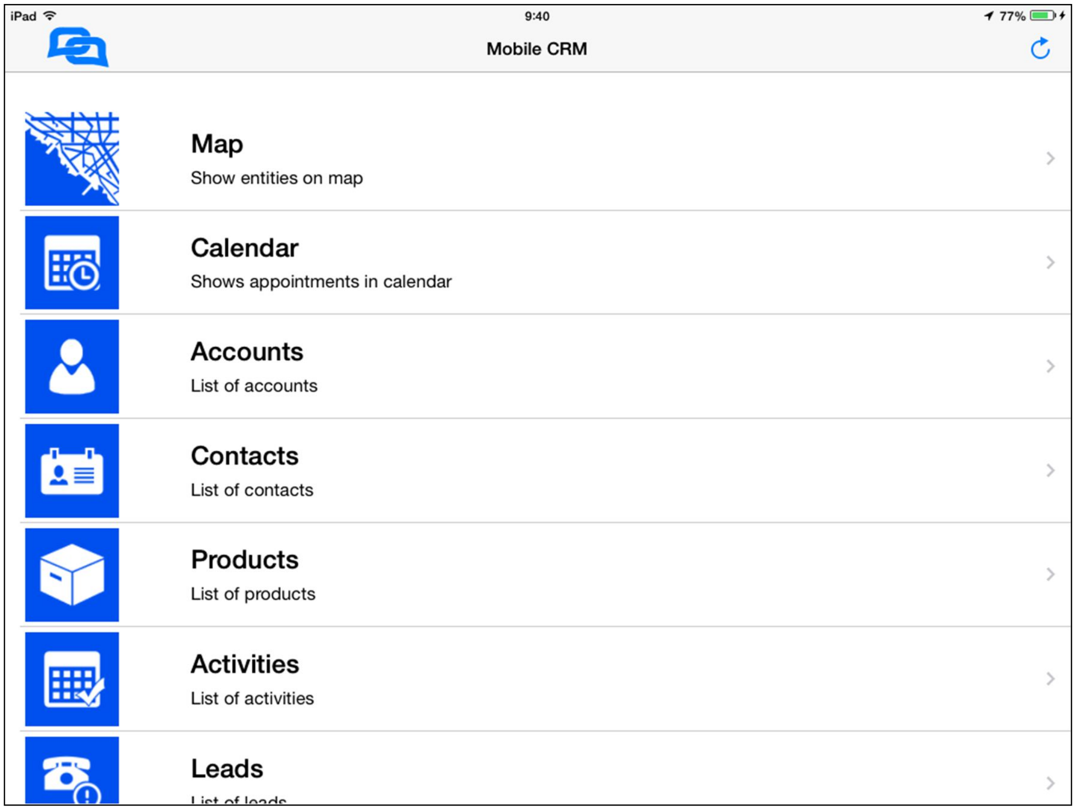
8 Supported devices

The Mobile CRM application is designed to work with devices running iOS 6 operating system or later. Any device running iOS 6 or never version of the operating system should be able to run the application. For further information about supported devices please have a look at the detailed information provided by the company or contact support.

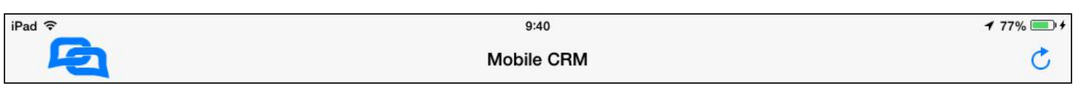
Basic app layout

This chapter describes the basic layout of the Mobile CRM app. Mobile CRM app can be divided into three parts:

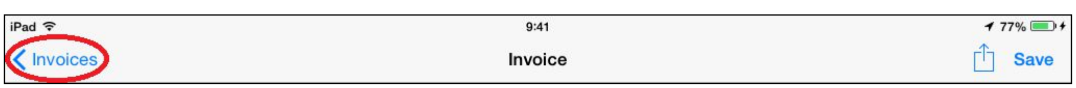
- The title frame
- The main menu content
- The sub page content



On the upper half of the screen is a title frame. The title frame describes the name of the current page displayed and contains buttons to provide functionality associated with the displayed page.

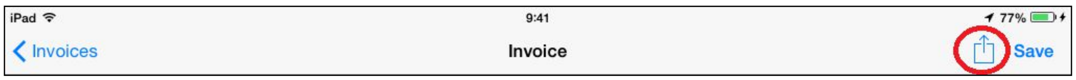


If a sub page is able to navigate backwards, a back button is visible on the left side of the title frame. To navigate back to the previous page, tap on the back button icon or the back button on the device.

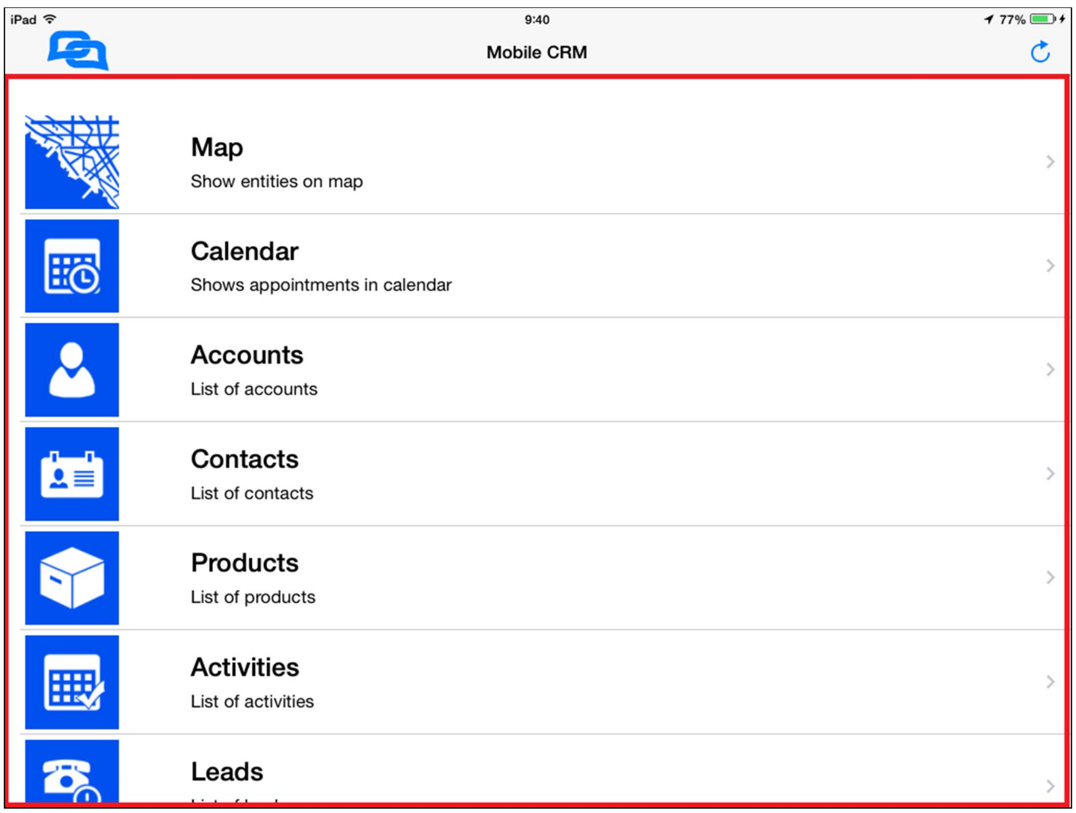


When the displayed page has an action that can be executed by the user (for example "Save" functionality) the action button is visible on the right side of the title frame.

When the displayed page has an action that can be executed by the user and also has additional functionality available, the additional actions button is visible next to the action button. To display the list of available actions, tap on the additional actions button.



The content of the displayed page is visible under the title frame.

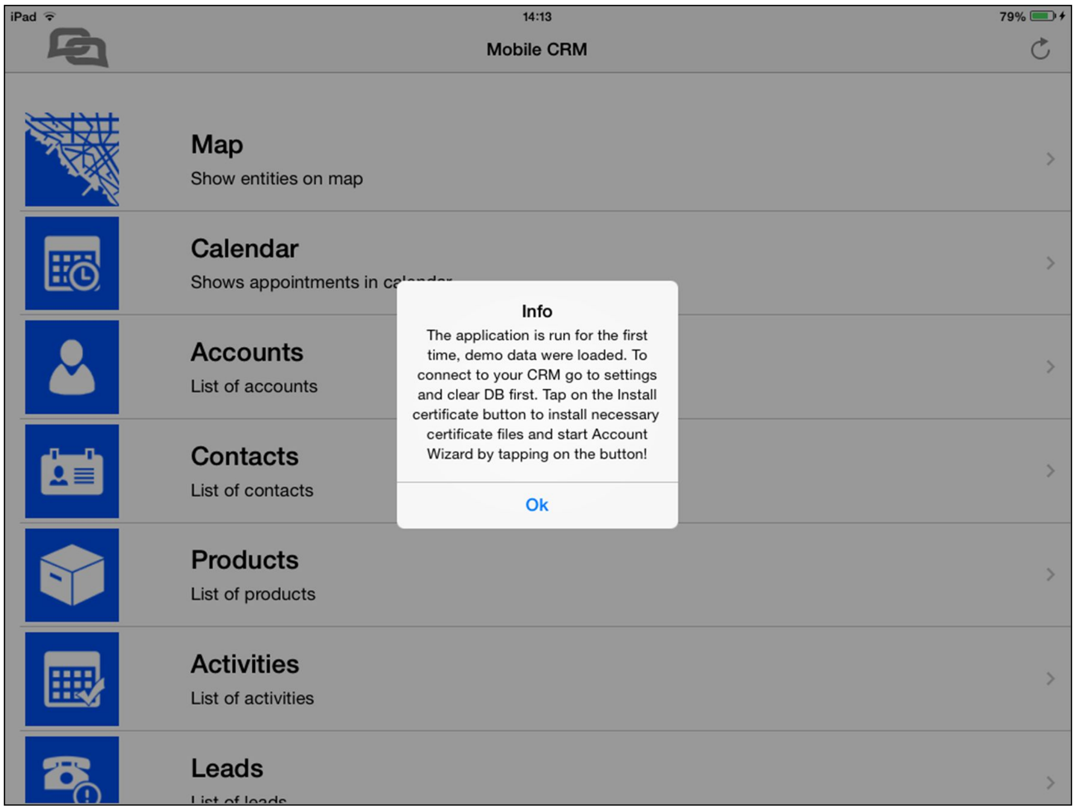


Some of the pages display the total number of entities stored and synchronized in the local DB. Usually the page contains list of entities for the user to choose from.

First time run

When the application is run for the first time, local database is created in the applications isolated storage and demo data are loaded into the database. With the demo data loaded into the local database, the user can try out the functionality of the application before the first connection to the users CRM server is attempted.

After the local database was created and demo data loaded into the database alert view with short notice about the executed action is displayed to the user.



9 Look & feel

9.1 Themes

The user can also choose from two application themes:

- Dark theme
- Light theme

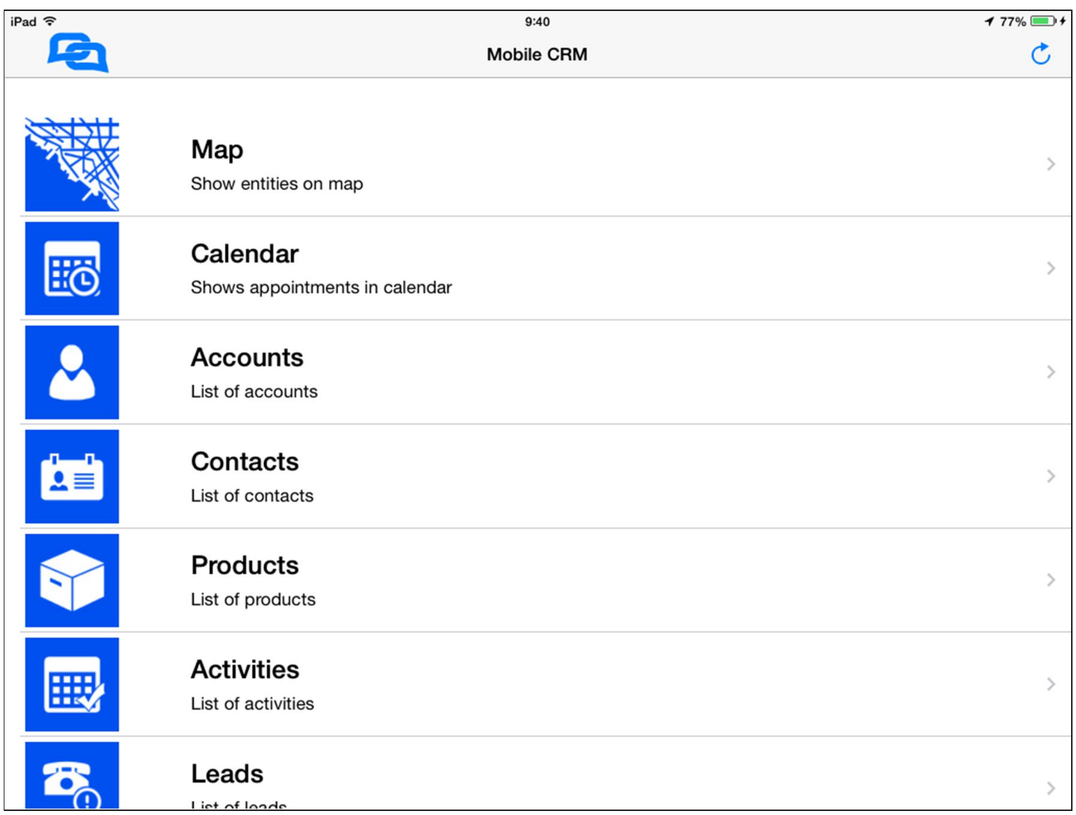
The themes can be changed by the user on the settings page. Default theme is set to light theme. Light theme causes higher battery consumption due to the bright colours used. When theme is changed by the user, the application has to be restarted in order to apply the settings.

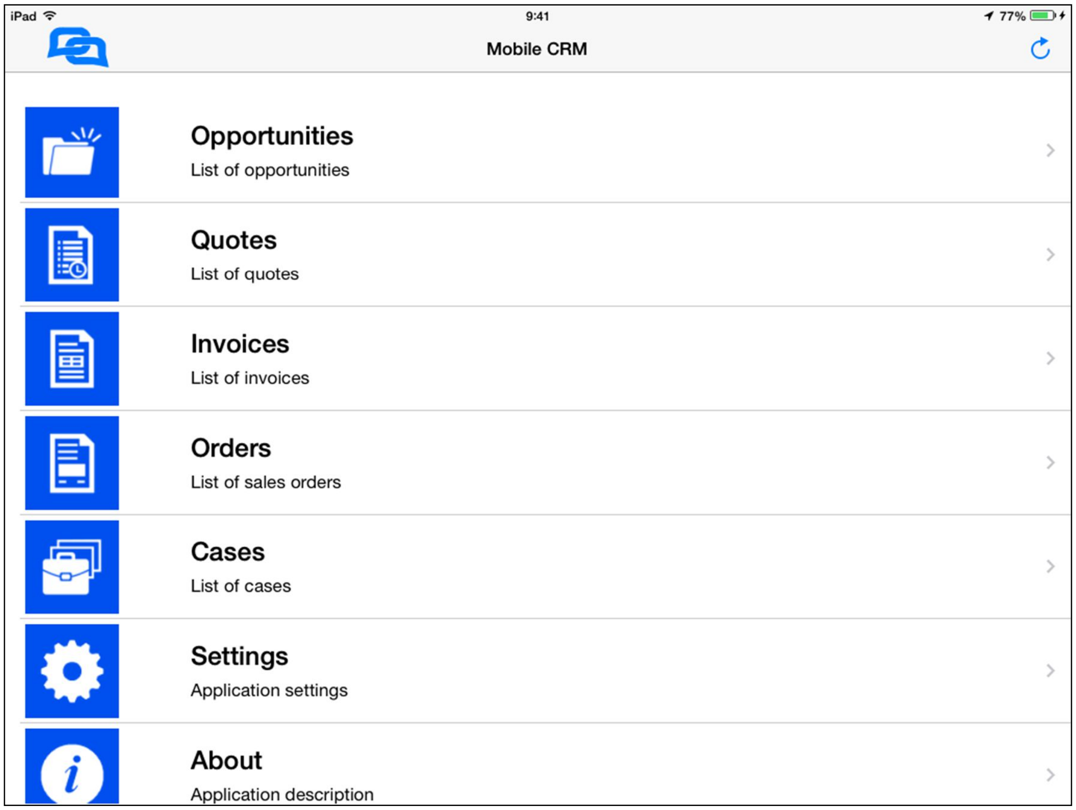
10 Main menu

Main menu contains the list of available application pages. The list of available entity pages can be modified on the settings page by choosing the type of entities that the user wants to see on the menu. Some of the pages are displayed by default and cannot be hidden by the user. To navigate to a specific page, tap on the page name in the list of pages.

Pages displayed by default:

- Dashboard (Only iPad version)
- Map
- Scan Code
- Calendar
- Contacts
- Accounts
- Settings
- About





10.1 Main menu Items order

The user is able to change the default order of the items displayed on the main menu to fit personal preference.

To change the order of the items go to "Settings". On the page tap on the "Reorder items" button. After tapping on the button a page where the reordering is done appears. The user has to specify the preferred order for all of the items and then confirm the setup by tapping on "OK" button

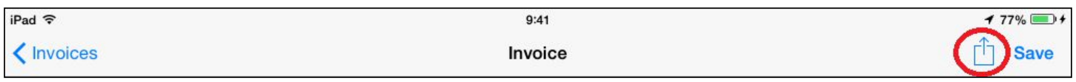
11 Functionality description

11.1 Dashboard

Dashboard page (available only on iPad) contains different kinds of charts with data for specific fiscal year. The displayed chars can be modified in the chart settings by changing the setting options. The default chart is column chart, this chart cannot be hidden. Three optional charts are pie chart, pipeline chart (horizontal bars) and line chart.

11.1.1 Chart setting options

To show or hide the list of available chart options, tap on the additional actions button and a window with chart setting options will be displayed.



To show or hide additional charts, check or uncheck the checkbox representing the name of the chart to be displayed or hidden. When charts are displayed or hidden, the main chart sub page layout is modified according to the enabled chart options. The charts are resized to fit the main subpage screen in order to provide best user experience.

Each chart has several options for entities that are displayed in the chart. Any combination of enabled or disabled entities is displayed in the corresponding chart. The name of the chart is displayed in the title above the settings.

11.1.2 Data filters

CB MobileCRM supports charts for last 5 fiscal years including current year. The displayed fiscal year can be changed by selecting the requested fiscal year from the combo box.

Displayed data for user selected fiscal year can be further filtered by quarters. Any combination of quarters of fiscal year is supported and the data displayed in each chart are filtered after each change.

CB MobileCRM supports advanced filter options to filter the data displayed in the charts when the user needs to display data for a time period that is smaller than a quarter of fiscal year. To enable the advanced filter options, check the "Advanced Filter" checkbox. When checked, additional window with settings is displayed.

Advanced filter options include filtering by month, by week number or by exact day.

- **Months** - advanced option representing months allows the user to filter each month from the range of enabled quarters of fiscal year.
- **Week number** - advanced option representing week number allows the user to filter a specific week from the range of weeks for enabled range of quarters of fiscal year
- **Day** - advanced option representing filter of exact day of current fiscal year

11.1.3 Chart filter combinations

CB MobileCRM allows the user to filter the displayed entities for each of the charts, to view the results in different kinds of chart. Currently the app allows following entities:

- **Incident cases**
- **Leads**
- **Opportunities**
- **Orders**
- **Accounts**
- **Contacts**

11.1.3.a Default chart

The default column chart allows following combinations of enabled entities:

- **Only Incident cases** - Displays chart with number of cases for each customer created in each quarter of fiscal year
- **Only Leads** - Shows chart with number of accounts, contacts and opportunity entities created by qualified leads that were created and qualified in current fiscal year. The chart is divided by quarters of fiscal year.
- **Only Opportunities** - Displays chart with the sum of estimated value of opportunities for each customer created in current fiscal year and divided by quarters of fiscal year.
- **Only Orders** - Displays chart with sum of total value for all orders created in current fiscal year per each customer. Divided by quarters of fiscal year.
- **Only Accounts** - Shows chart with number of associated entities (case, order, lead, opportunity, contact) created in current fiscal year from accounts or regarding accounts created in current fiscal year
- **Only Contacts** - Shows chart with number of activities (E-mail, Task, Phone Call, Fax, Appointment, Letter) created in current fiscal year regarding contacts created in current fiscal year.
- **Any combination of two or more** - Shows the number of entities of each type for each quarter of fiscal year

11.1.3.b Pipeline chart

In current version of MobileCRM, pipeline chart only allows to display results for Leads.

- **Leads** - Displays chart with total number of leads created in current fiscal year. Displays number of qualified leads from the total number of created leads, number of opportunities, contacts, accounts and contacts created from total number of qualified leads from currently selected fiscal year.

11.1.3.c Pie chart

Pie chart allows following combinations of enabled entities:

- **Only Incident cases** - Displays chart with number of cases for each customer created in currently selected range of quarters of fiscal year
- **Only Leads** - Displays chart with estimated value per lead created in currently selected range of quarters of fiscal year
- **Only Opportunities** - Displays chart with estimated value per opportunity created in currently selected range of quarters of fiscal year
- **Only Orders** - Displays chart with total amount per order created in currently selected range of quarters of fiscal year
- **Only Accounts** - Displays chart with number of accounts created in each quarter of fiscal year
- **Only Contacts** - Display chart with number of contacts created in each quarter of fiscal year
- **Any combination of two or more** - Shows the number of entities of each type for selected range of fiscal year

11.1.3.d Line chart

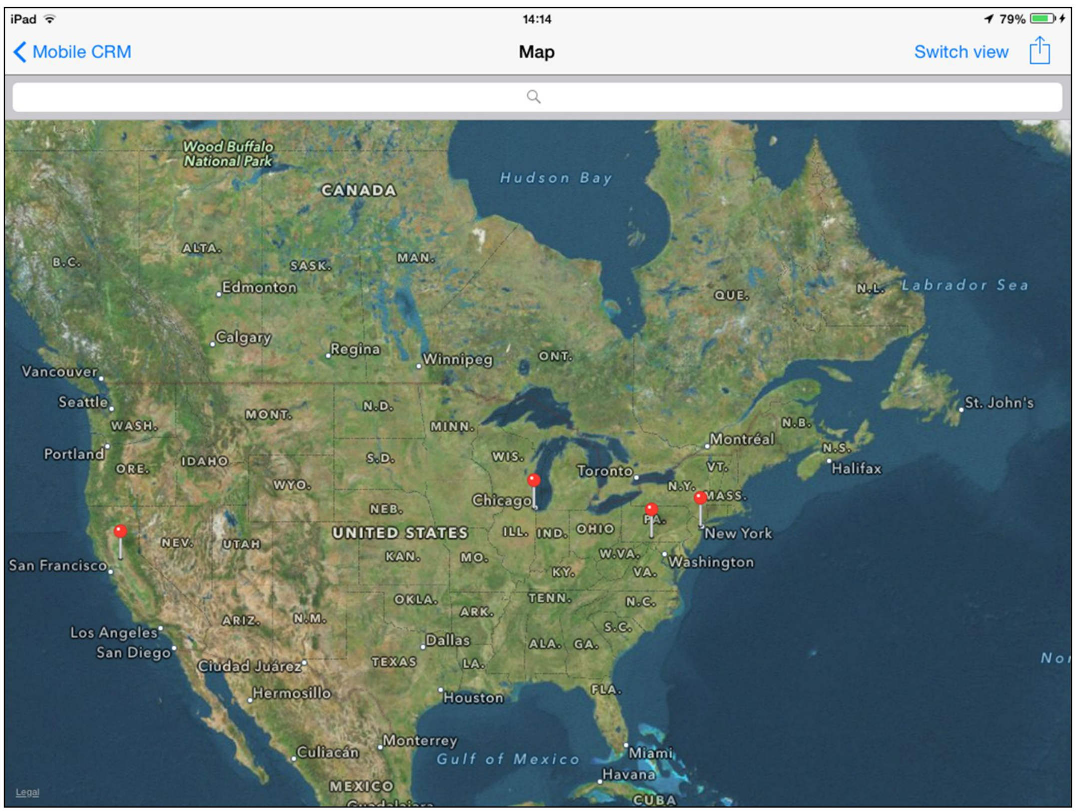
Line chart allows following combinations of enabled entities:

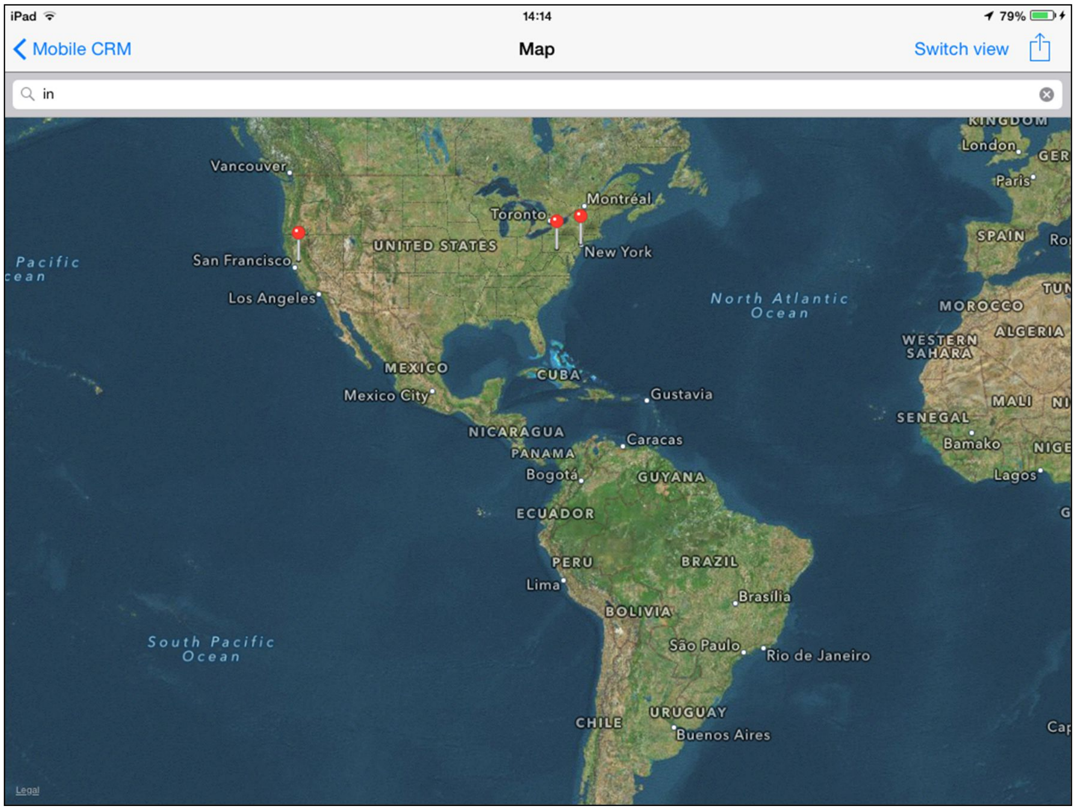
- **Only Incident cases** - Displays chart with number of cases for each customer created in each quarter of fiscal year
- **Only Leads** - Shows chart with number of accounts, contacts and opportunity entities created by qualified leads that were created and qualified in current fiscal year. The chart is divided by quarters of fiscal year.
- **Only Opportunities** - Displays chart with the sum of estimated value of opportunities for each customer created in current fiscal year and divided by quarters of fiscal year.
- **Only Orders** - Displays chart with sum of total value for all orders created in current fiscal year per each customer. Divided by quarters of fiscal year.
- **Only Accounts** - Shows chart with number of associated entities (case, order, lead, opportunity, contact) created in current fiscal year from accounts or regarding accounts created in current fiscal year

- **Only Contacts** - Shows chart with number of activities (E-mail, Task, Phone Call, Fax, Appointment, Letter) created in current fiscal year regarding contacts created in current fiscal year.
- **Any combination of two or more** - Shows the number of entities of each type for each quarter of fiscal year

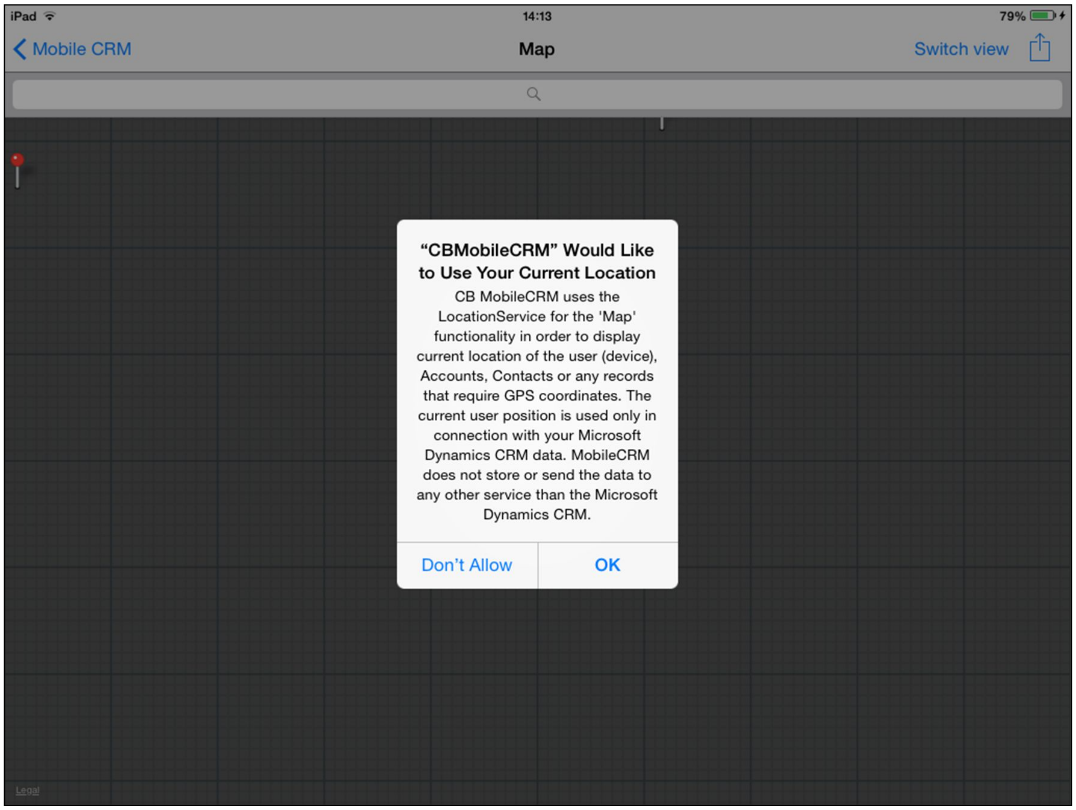
11.2 Map page

Map page contains a map with locations of all available accounts, contacts and leads. The user can filter the displayed entities by typing a search string into the search bar. Displayed pushpins will be filtered and only pushpins containing the search string will be displayed.





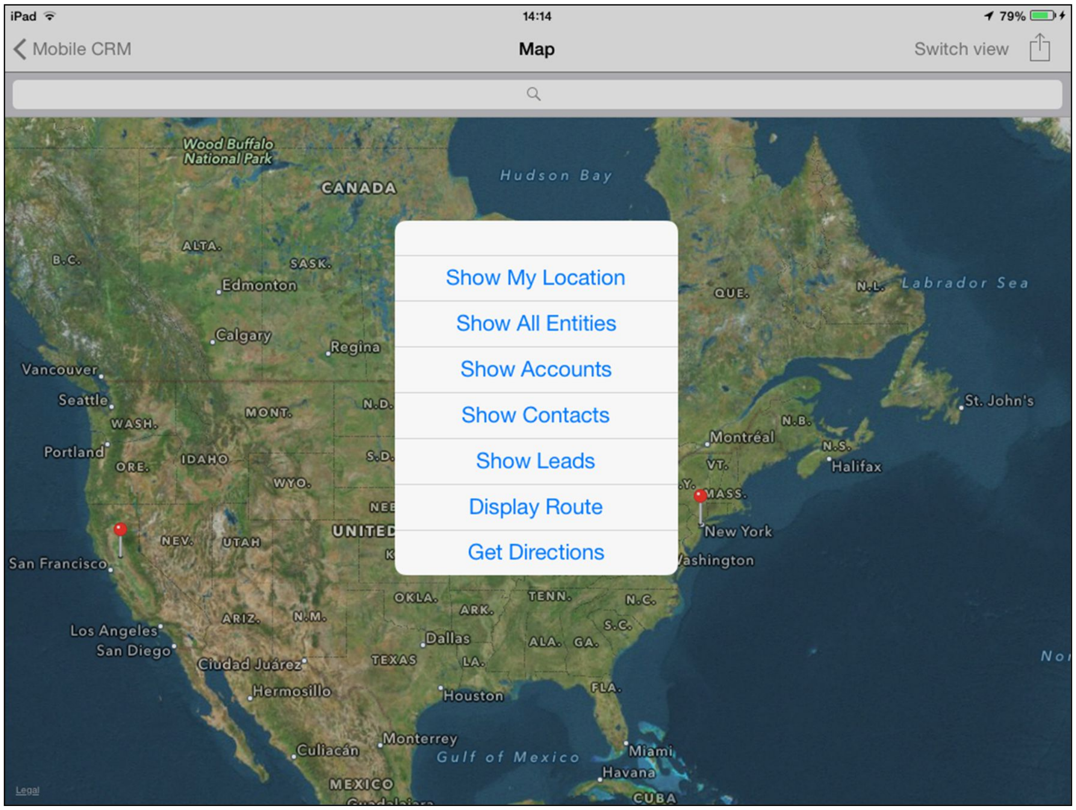
In order for the app to display the users current location, location service has to be used. Prior to using the service, user is asked for permission with an opt-in message only on the first run of the maps. The iOS system then remembers the app and automatically allows the app to access location service. The user can however turn off the permission in the devices settings menu.



In order to display precise location of entities we suggest the user to update the latitude and longitude for each entity directly in CRM server.

NOTE:

When coordinates for the entity are not available, only city and country is used to search for coordinates as there is higher probability that the Map service returns a value with coordinates. When the address line would be used as well, only precise address location would return geo coordinates. This means that the user would have to type precise full name of the street with correct numbers in order to get result!



The Map page supports additional actions as indicated by the button in the title frame. To show the list of available additional actions, tap on the additional actions button and a context menu will be displayed.

The context menu contains following items:

- Show My Location - Display and zoom to the users current location
- Show All Entities - Display all available pushpins on the map
- Show Accounts - Display only Account pushpins on the map
- Show Contacts - Display only Contact pushpins on the map
- Show Leads - Display only Lead pushpins on the map
- Display Route - Display the route from current location to the User defined pushpin (User defines a destination pushpin by tap and hold on the map)
- Get Directions - Create a task for navigation service to show directions from current location to the User defined pushpin (User defines a destination pushpin by tap and hold on the map)

11.3 Scan Code page

Scan code page enables the user to scan and process any barcode supported by the app. By default the app supports QR codes that are commonly used at business cards.

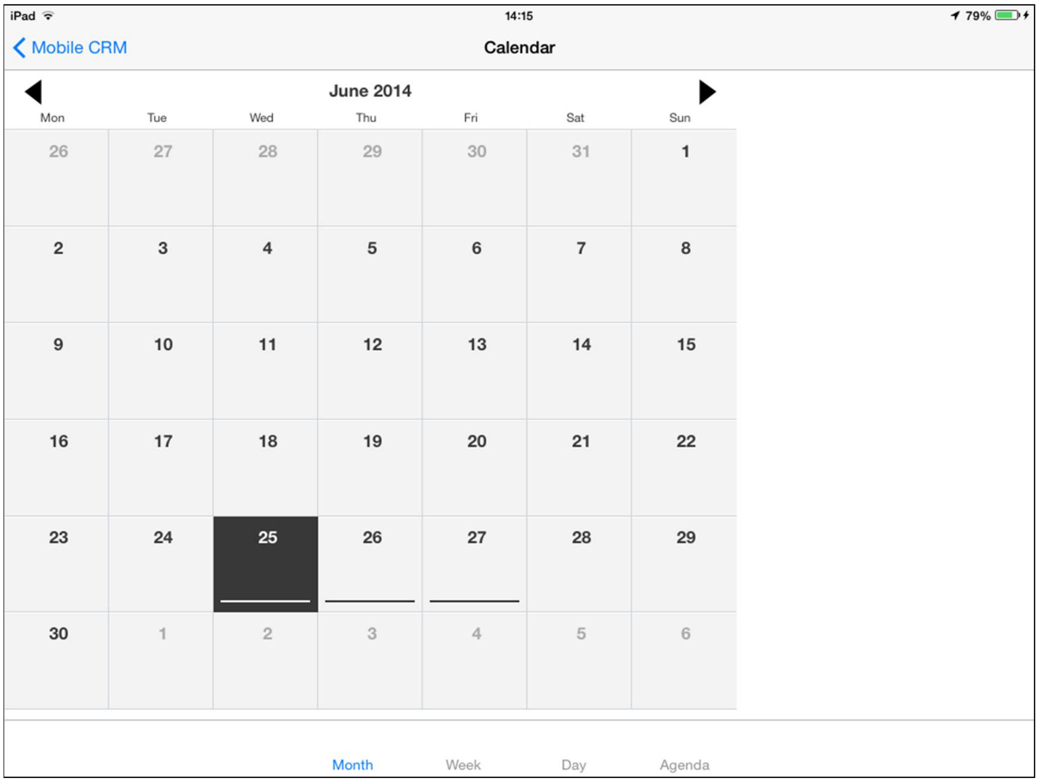
To scan a barcode tap on the "Scan Code" button and a page with the camera feed appears. On first run of the Scan, the user is prompted to enable microphone and camera usage.

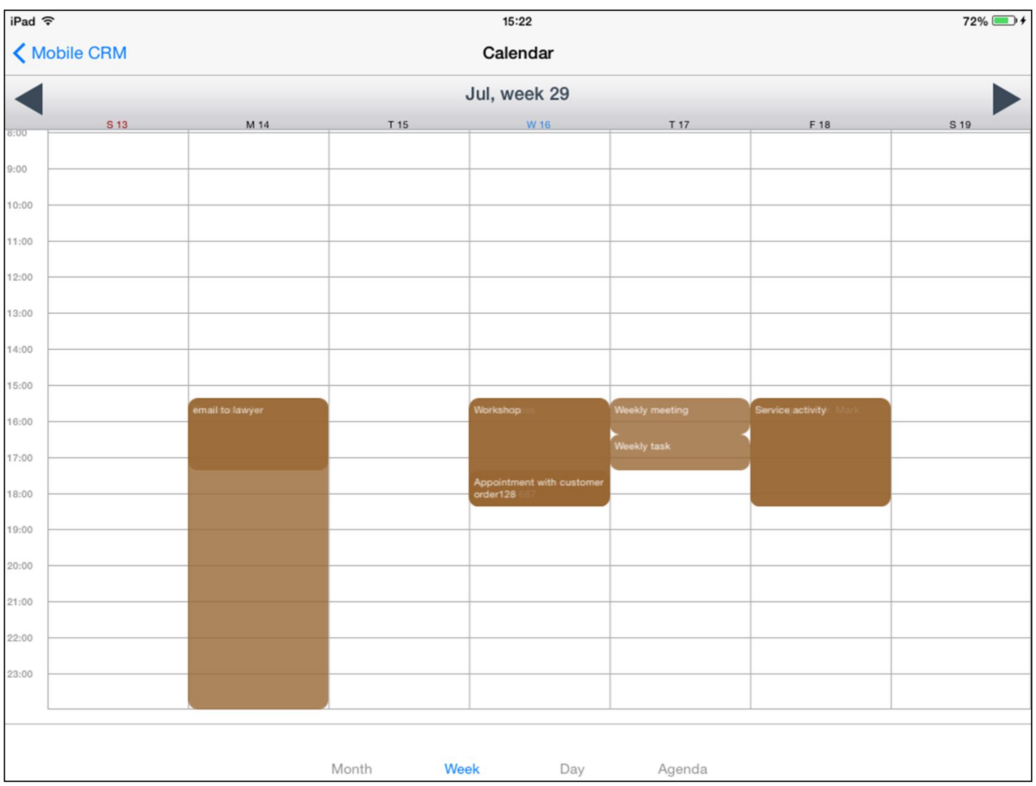
Scan the desired barcode and when code was scanned successfully the camera feed disappears and a button menu appears. On the button menu the user can choose the action that has to be done with the scanned barcode.

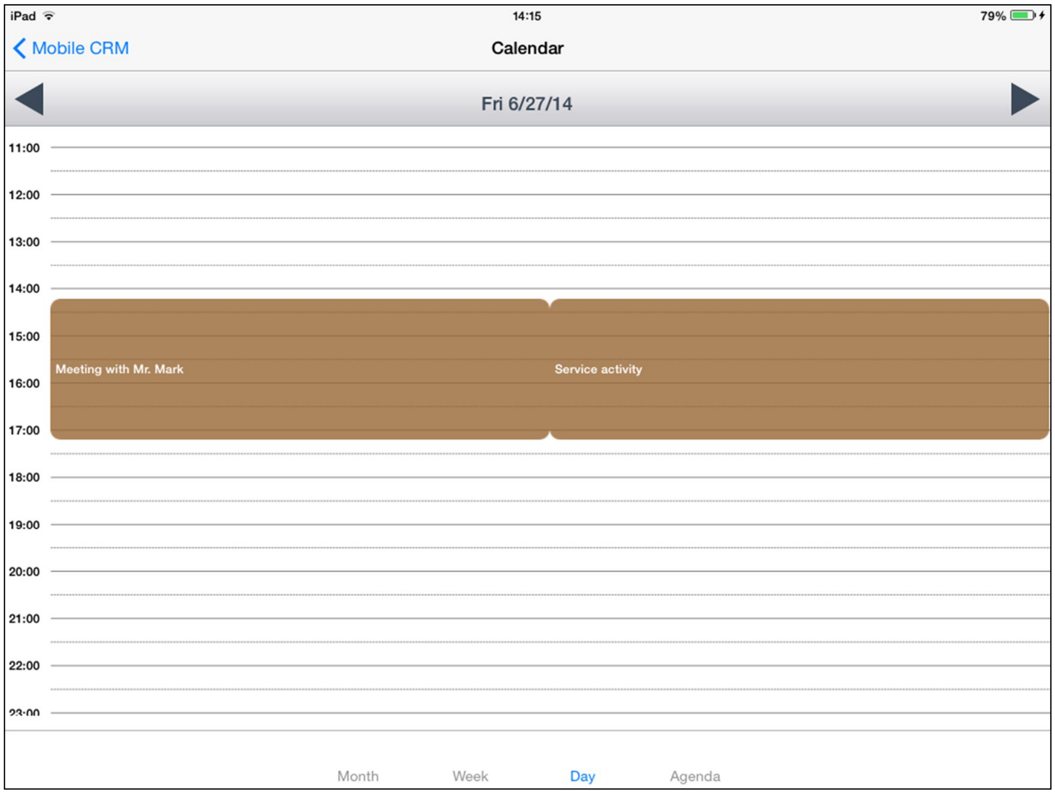
11.4 Calendar page

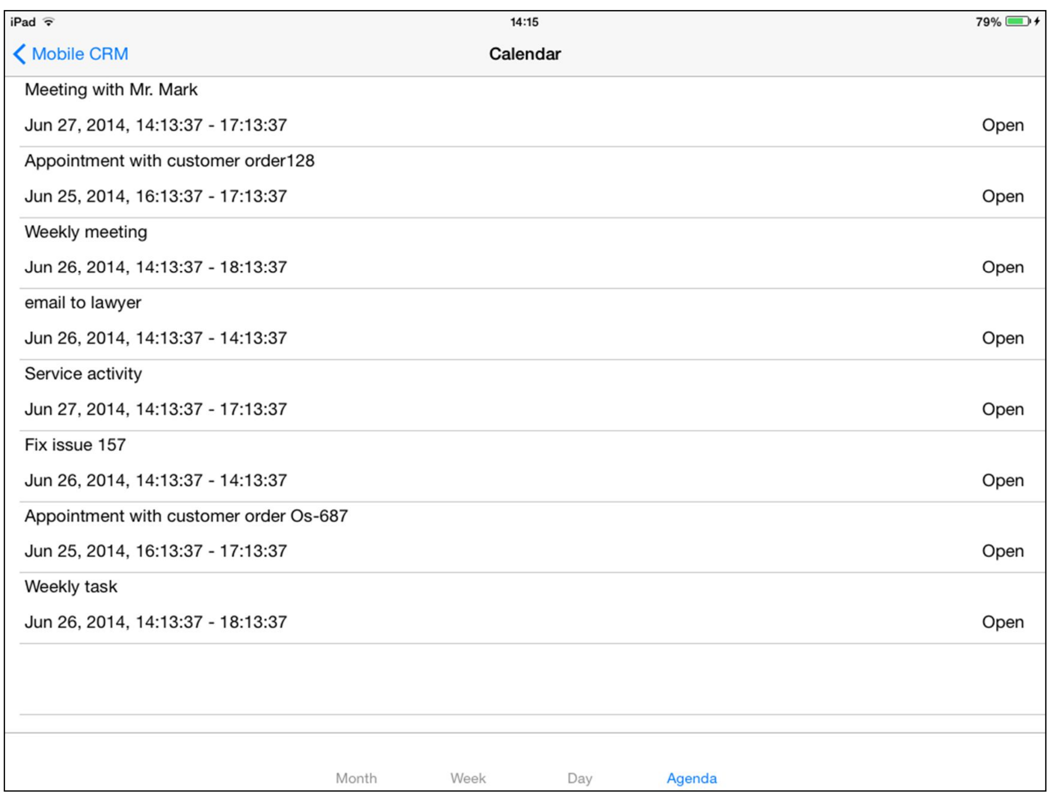
Calendar page contains appointments assigned to the current user. The user can further filter the appointments by selecting the appropriate view that contains the information the user is looking for. The calendar page has several views. This includes:

- Agenda view - displays all appointments that are due for today and later
- Day view - displays appointments that are due for specific day
- Week view - displays appointments that are due on specific week
- Month view - displays appointments that are due on specific month


Mobile CRM
Calendar
June 2014
Month
Week
Day
Agenda


Mobile CRM
Calendar
Jul, week 29
email to lawyer
Workshop
Appointment with customer order128
Weekly meeting
Weekly task
Service activity
Month
Week
Day
Agenda


iPad
14:15
79%
Mobile CRM
Calendar
Fri 6/27/14
11:00
12:00
13:00
14:00
15:00
16:00
17:00
18:00
19:00
20:00
21:00
22:00
Meeting with Mr. Mark
Service activity
Month
Week
Day
Agenda


iPad
14:15
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Mobile CRM
Calendar
Meeting with Mr. Mark
Jun 27, 2014, 14:13:37 - 17:13:37
Open
Appointment with customer order128
Jun 25, 2014, 16:13:37 - 17:13:37
Open
Weekly meeting
Jun 26, 2014, 14:13:37 - 18:13:37
Open
email to lawyer
Jun 26, 2014, 14:13:37 - 14:13:37
Open
Service activity
Jun 27, 2014, 14:13:37 - 17:13:37
Open
Fix issue 157
Jun 26, 2014, 14:13:37 - 14:13:37
Open
Appointment with customer order Os-687
Jun 25, 2014, 16:13:37 - 17:13:37
Open
Weekly task
Jun 26, 2014, 14:13:37 - 18:13:37
Open
Month
Week
Day
Agenda

Tapping on a specific appointment in the list of appointments on "Agenda" view or "Day" view will open the detail about the user selected appointment.

Tapping on a specific appointment in the "Week" view will navigate to the "Day" view for the specific day and all appointments for that day are loaded as well. This is due to the possibility that there may be more than one appointment on that specific day.

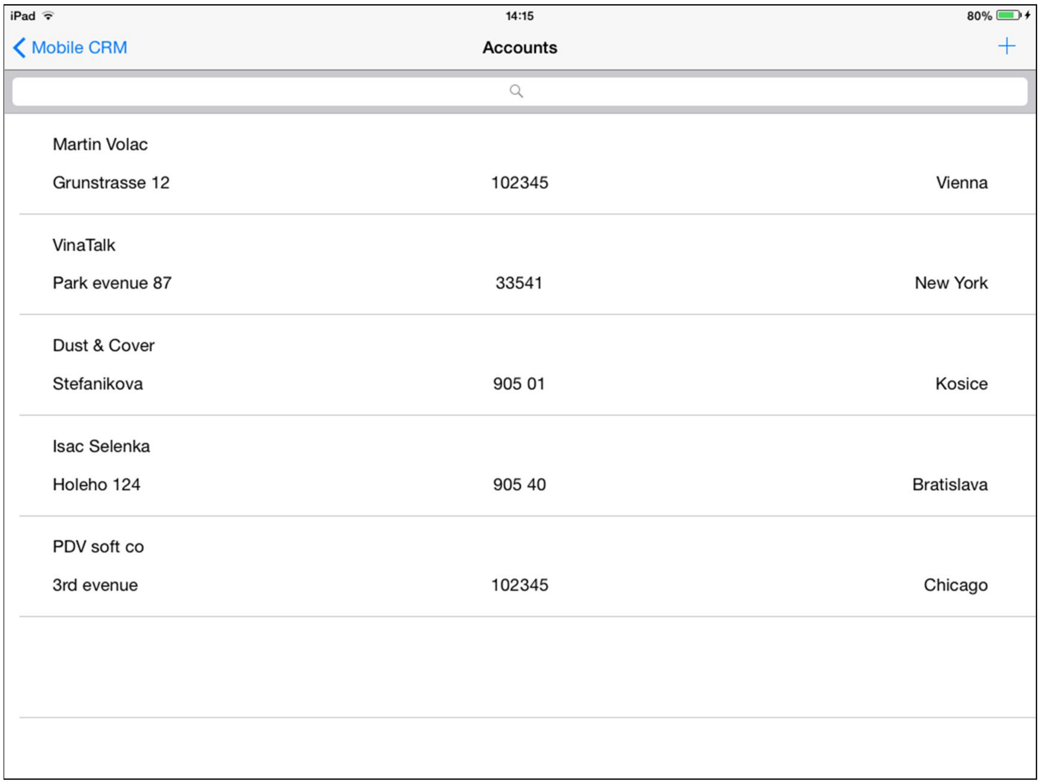
Tapping on a specific day in the "Month" view will navigate to the "Week" view where the week containing the tapped day is loaded. To load data about specific day, tap on the day in the "Week" view that was loaded.

11.5 Accounts page

Accounts page contains a list of available CRM accounts. To display details about a specific account, select the account from the list by tapping on the item.

The user can use filter to look for a specific account by typing a search string into the search box.

The user can sort the list of accounts according to personal preference. To sort the list choose the preferred sort type and the list will be sorted.


iPad
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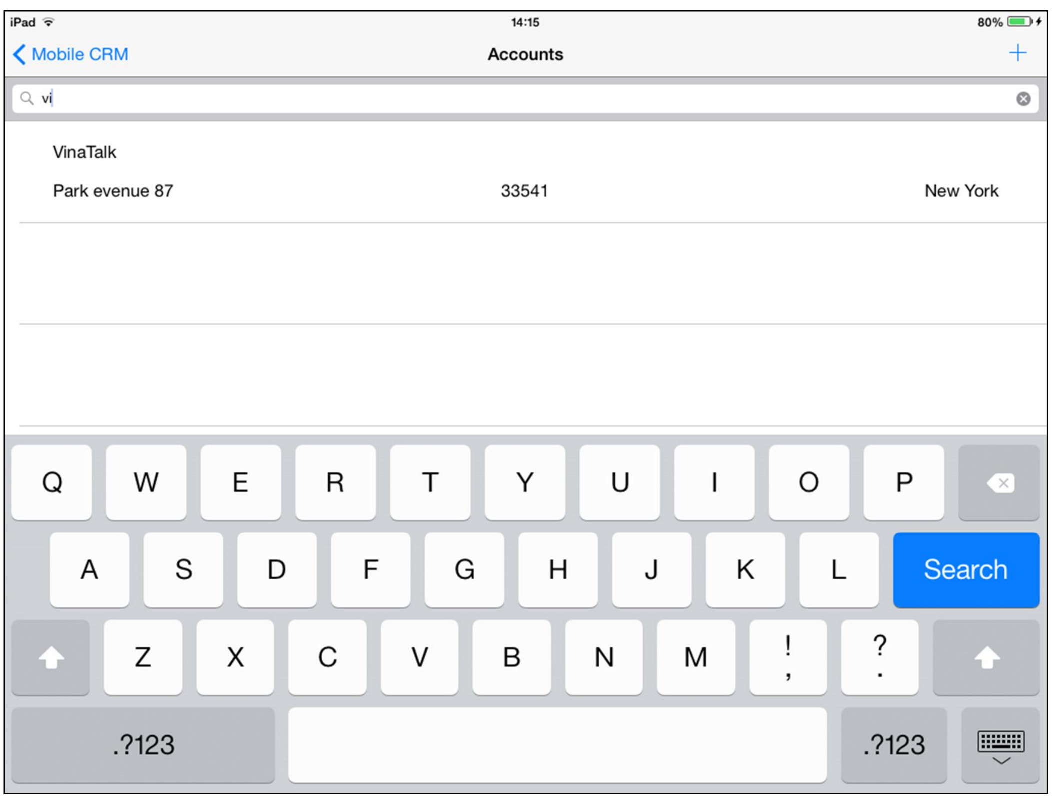
80%
Mobile CRM
Accounts
Martin Volac
Grunstrasse 12
102345
Vienna
VinaTalk
Park evenue 87
33541
New York
Dust & Cover
Stefanikova
905 01
Kosice
Isac Selenka
Holeho 124
905 40
Bratislava
PDV soft co
3rd evenue
102345
Chicago


iPad
14:15
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Mobile CRM
Accounts
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VinaTalk
Park evenue 87
33541
New York
Q W E R T Y U I O P
A S D F G H J K L
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Z X C V B N M
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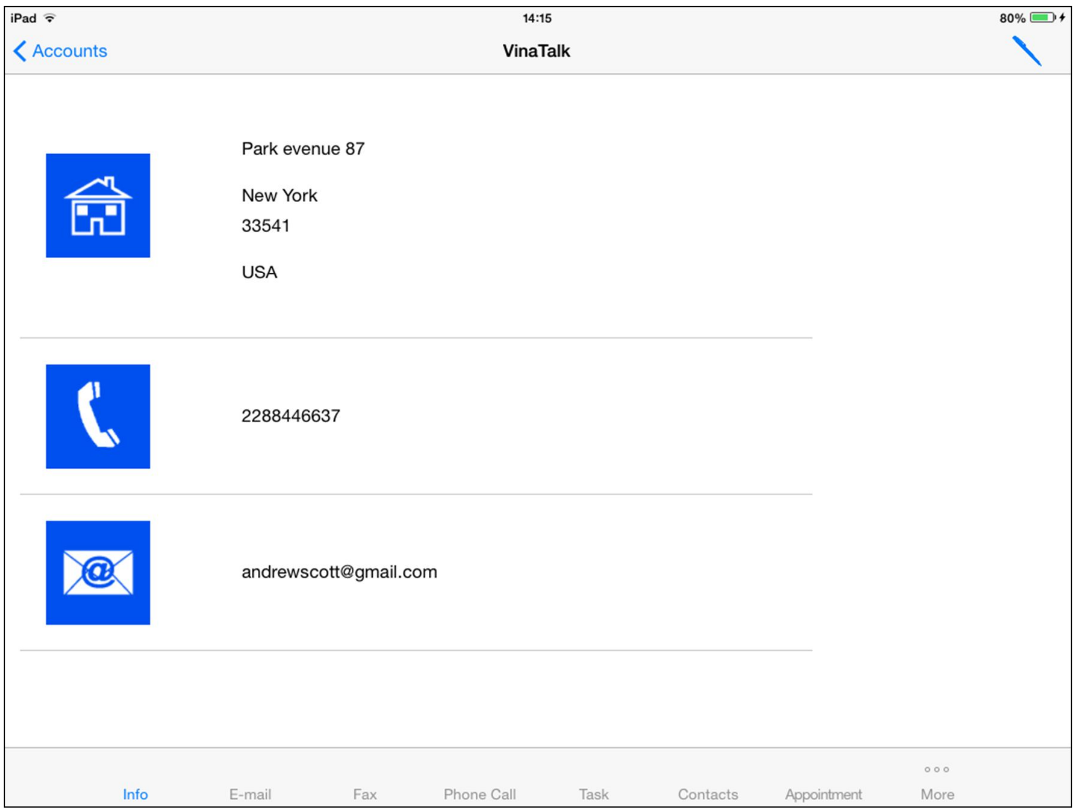
11.5.1 Account detail page

Account detail page contains information about a specific account. The basic account information displayed on the info page are account address, account phone number and account email.

The account detail page also contains data about entities that are associated with currently displayed account. Each entity type has its own tab bar page with the list of associated entities. Currently Mobile CRM shows associated contacts, emails, phone calls, tasks, faxes, letters and appointments.



To display details about any associated entity, tap on the item in the tab bar. The app is going to navigate to a new page with details about the selected item.

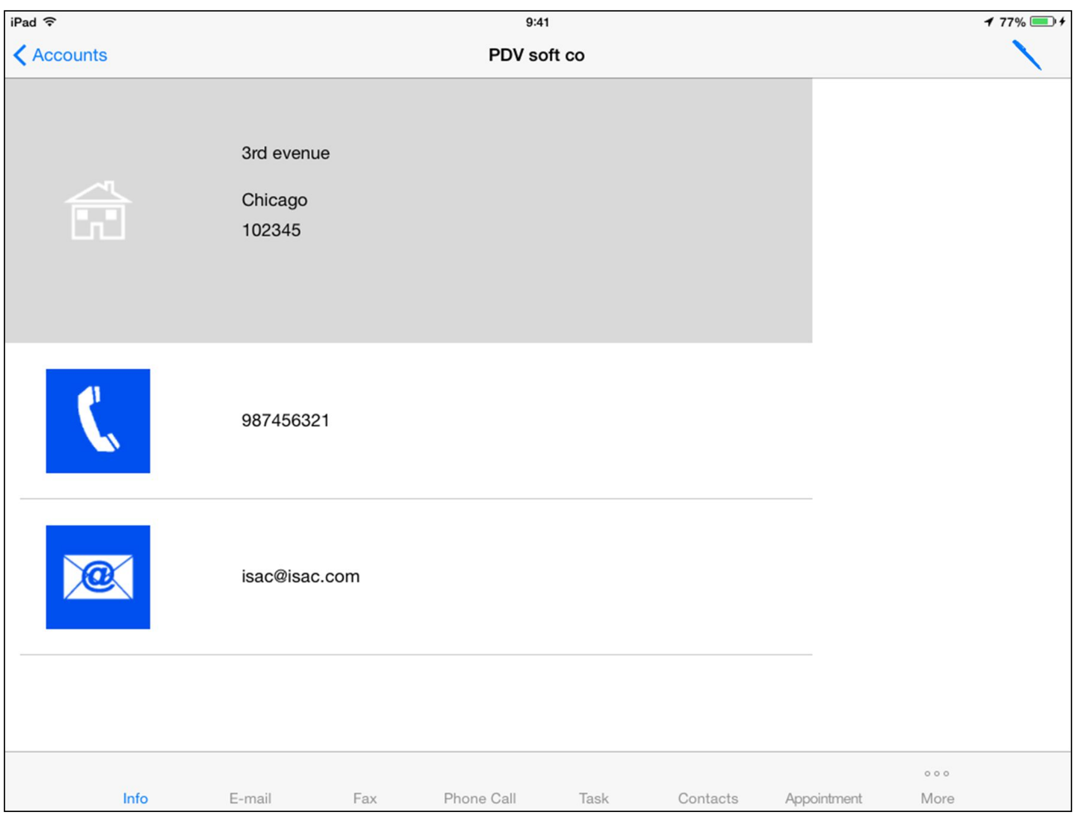
11.5.1.a Account detail page functionality

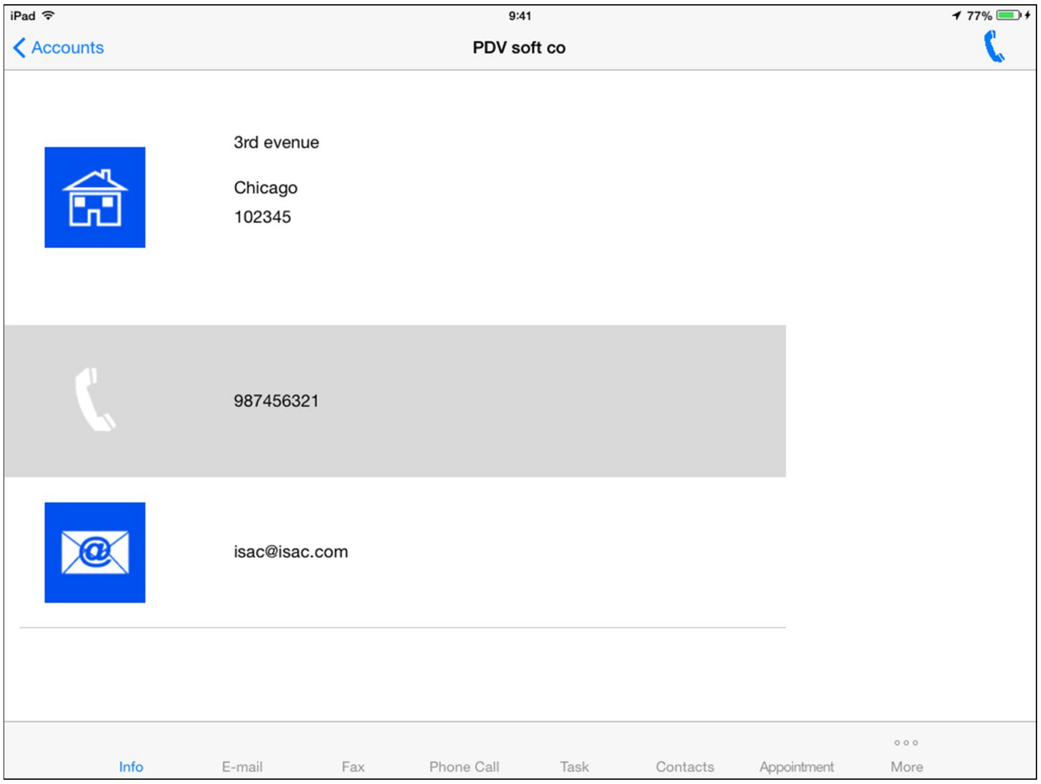
The basic account information displayed on the info page allow the user to execute a specific action associated with the displayed details.

To **edit the address** of the current account select the address item from the list and tap on the pen icon in the main title frame or tap on the house icon in the list. When the icon button is tapped, the application navigates to account edit detail page, where the user can edit the account details.

To **make a phone call** to the contact person for current account, select the phone number from the list and tap on the telephone icon in the main title frame or tap on the telephone icon in the list. When the icon button is tapped the application tries to make a phone call if the device has phone call capabilities. When the device does not support doing phone calls, app tries to make a call using skype. A message is shown to the user to confirm the selected action. When the user confirms the action a phone call is initiated.

To **send email** to the contact person for the current account, select the email address from the list and tap on the envelope icon in the main title frame or tap on the envelope in the list. When the icon button is tapped, default email editor is opened and the user can type the email content.




iPad
9:41
77%
Accounts
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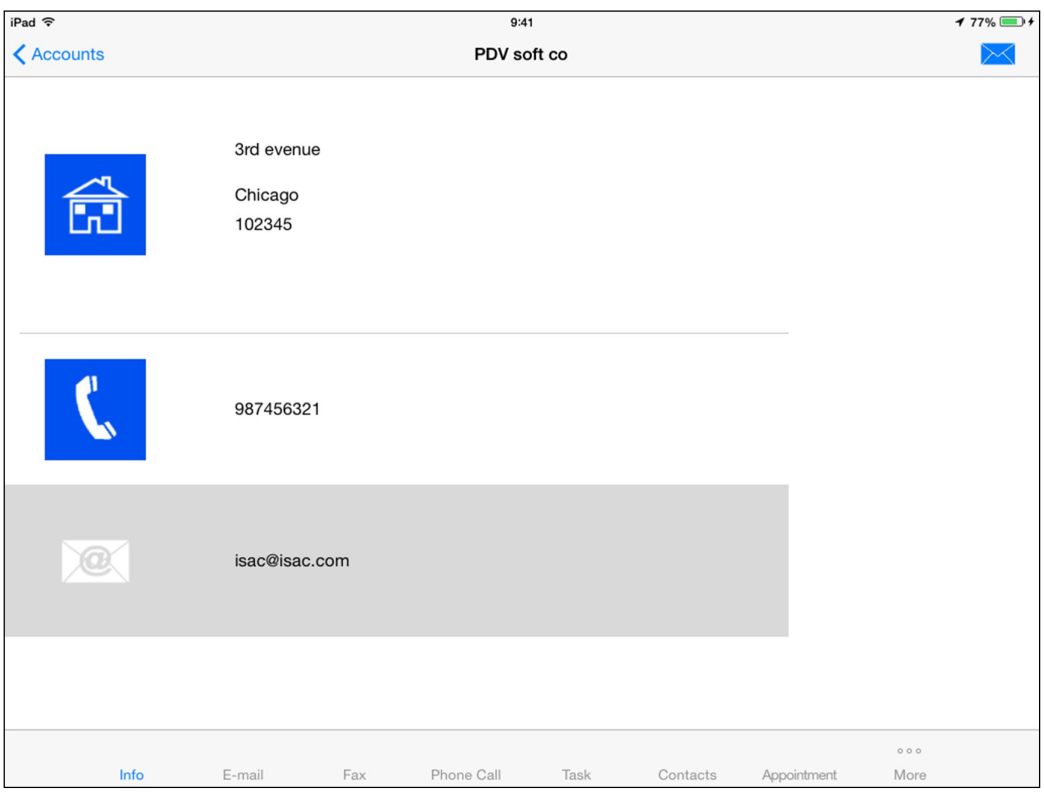
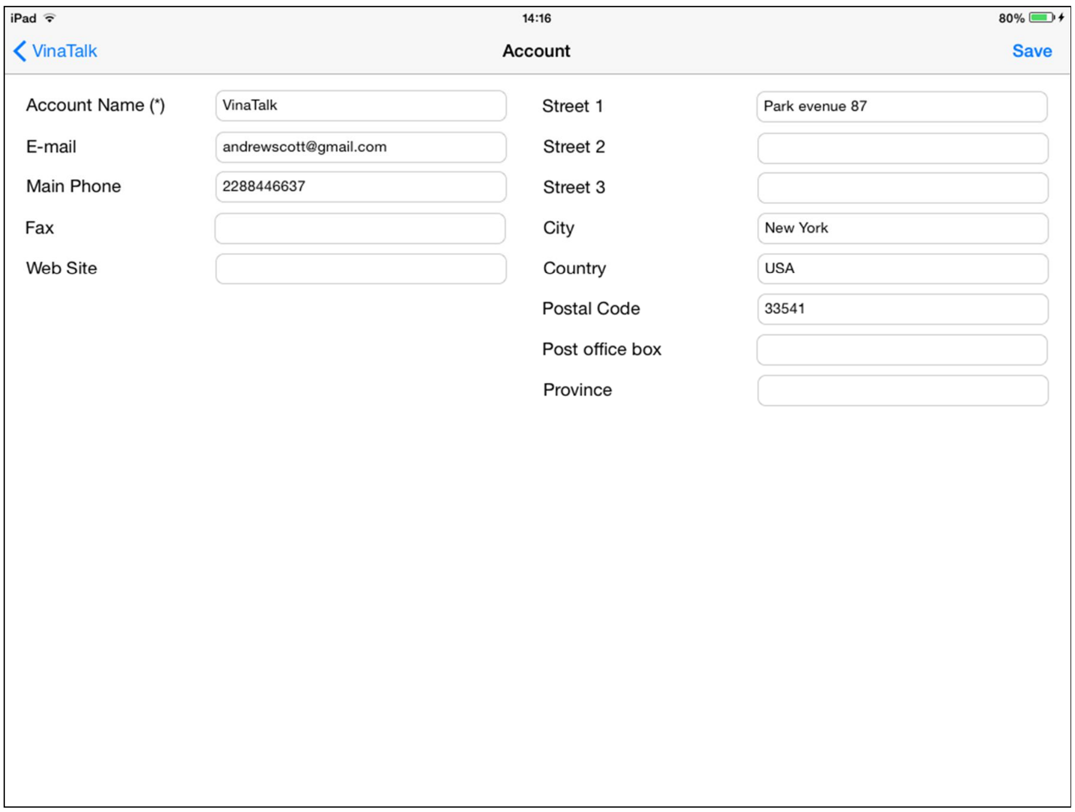
3rd evenue
Chicago
102345
987456321
isac@isac.com
Info
E-mail
Fax
Phone Call
Task
Contacts
Appointment
More


iPad
9:41
77%
Accounts
PDV soft co
3rd evenue
Chicago
102345
987456321
isac@isac.com
Info
E-mail
Fax
Phone Call
Task
Contacts
Appointment
More

11.5.2 Account detail edit page

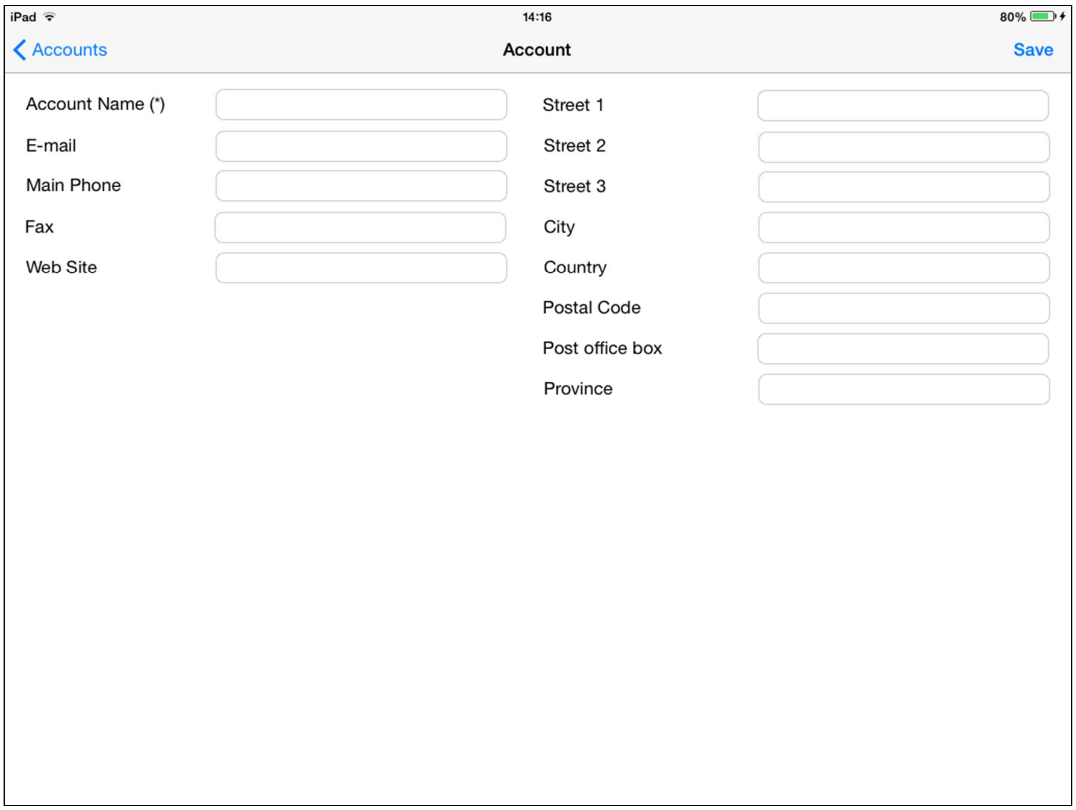
Account detail edit page displays information about a specific account. The user can edit the record by modifying the content of the rows. To save the modified data and update the CRM account tap on the “Save” button in the title frame.

The account is immediately modified and stored in the local database. The CRM account is updated via an update query (when online mode is selected) or an update query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

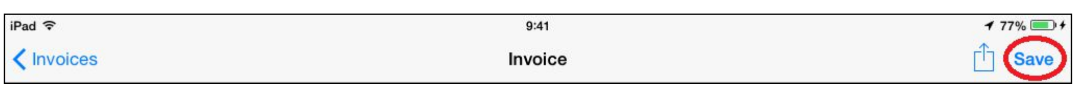


11.5.3 Create new account

To create new account, tap on the plus icon in the application title in the list of available accounts page and account detail edit page with new blank record will be displayed. The user can edit the record as required.



To save the newly created account, tap on the "Save" button in the title frame. The account is immediately created and stored in the local database. The CRM account is created via an insert query (when online mode is selected) or an insert query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

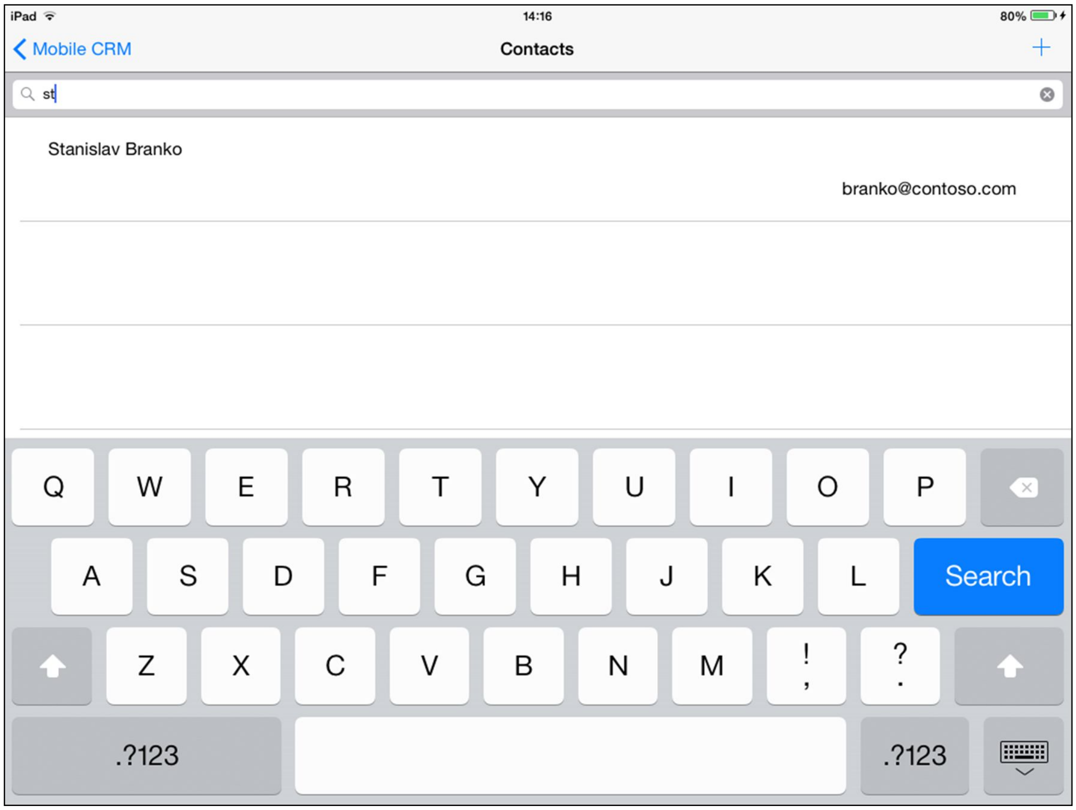


11.6 Contacts page

Contacts page contains information about the available CRM contacts. To display details about a specific contact, select the contact from the list by tapping on the item.

The user can use filter to look for a specific contact typing a search string into the search box.

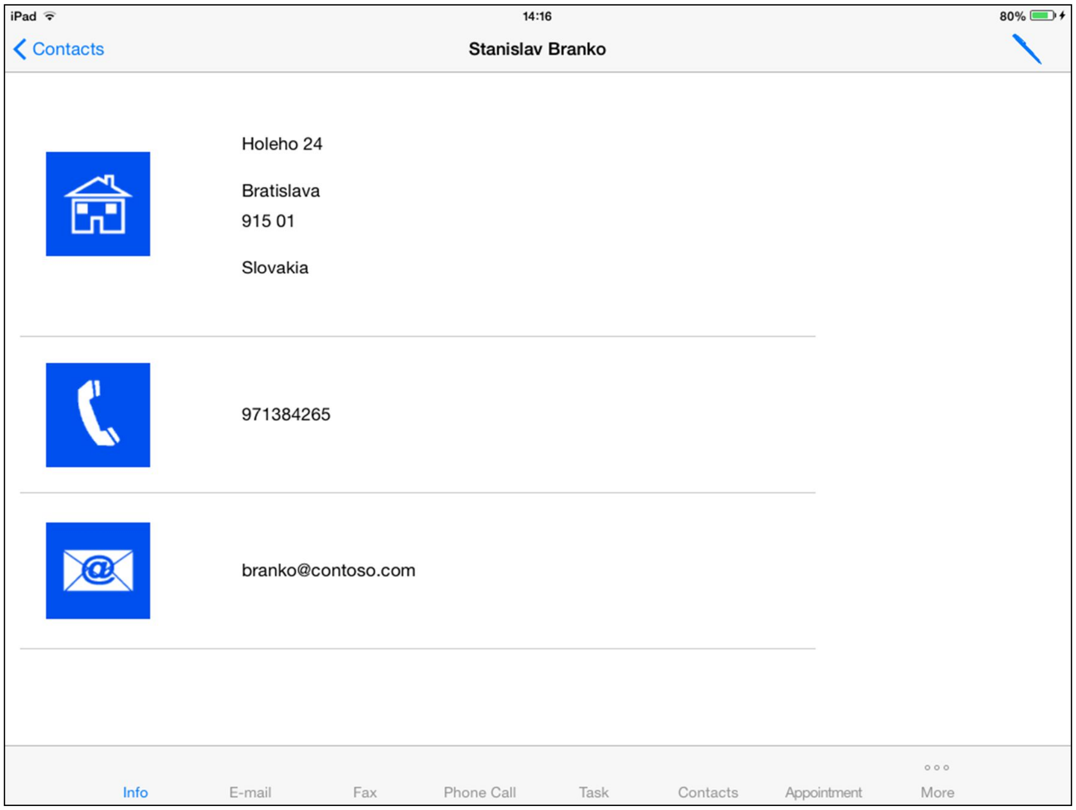
The user can sort the list of contacts according to personal preference. To sort the list choose the preferred sort type and the list will be sorted.



11.6.1 Contact detail page

Contact detail page contains information about a specific contact. The basic information about the contact displayed on the info page are contact address, contact phone number and contact email.

The contact detail page also contains data about entities that are associated with currently displayed contact. Each entity type has its own tab bar page with the list of associated entities. Currently Mobile CRM shows associated contacts, emails, phone calls, tasks, faxes, letters and appointments.



To display details about any associated entity, tap on the item in the tab bar. The app is going to navigate to a new page with details about the selected item.

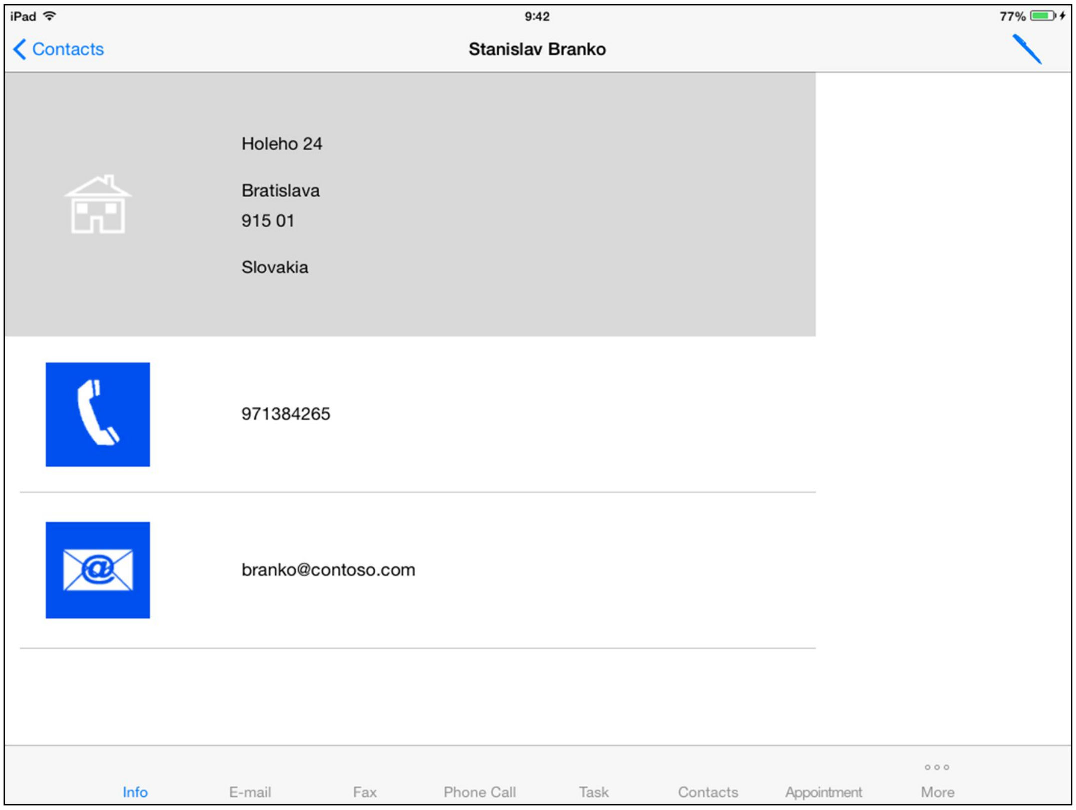
11.6.1.a Contact detail page functionality

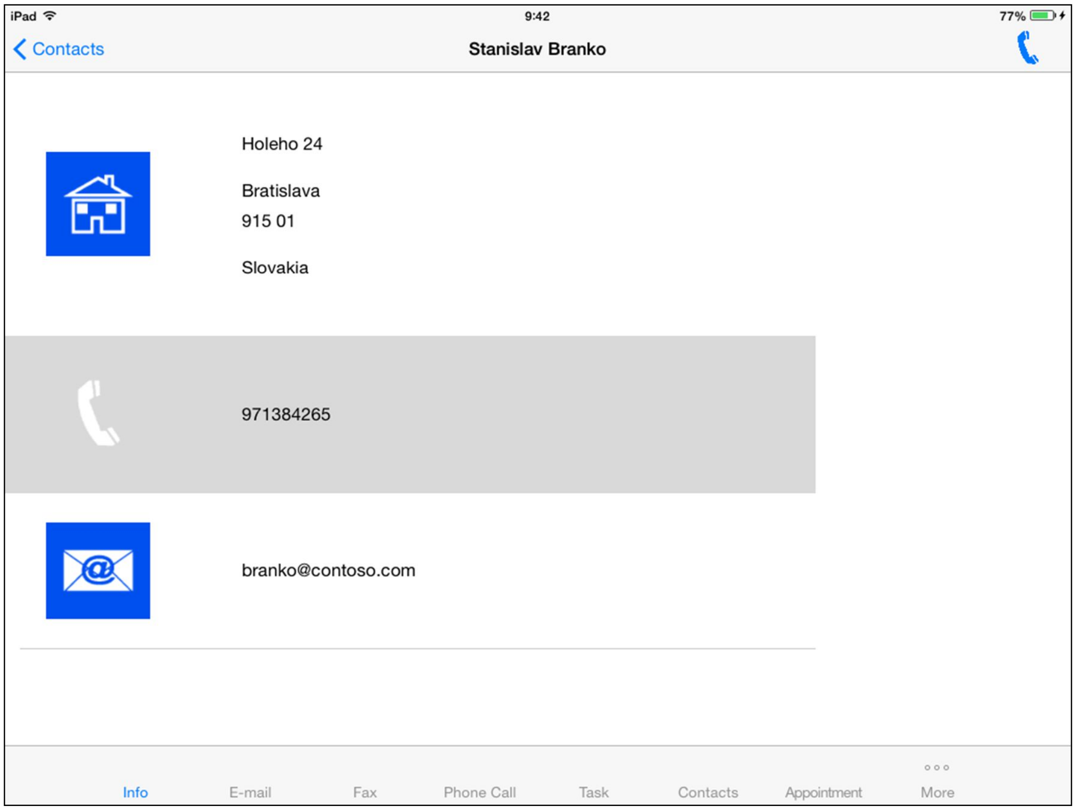
The basic contact information displayed on the info page allows the user to execute a specific action associated with the displayed details.

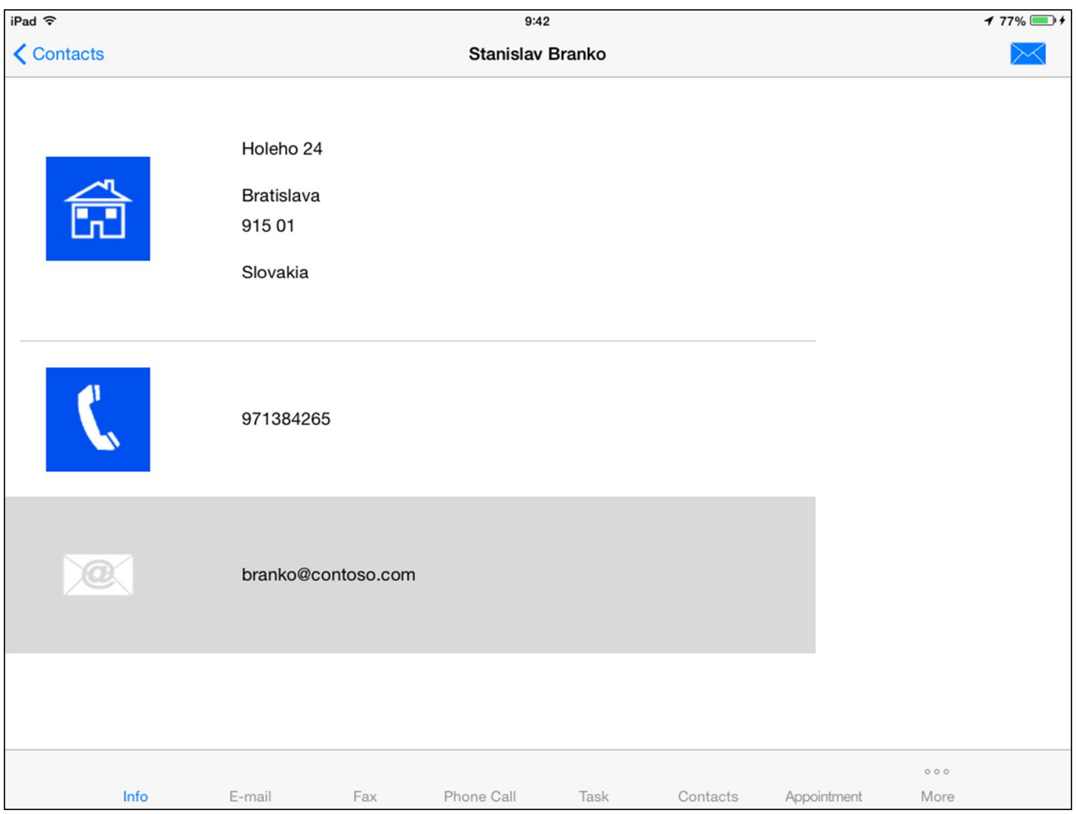
To **edit the address** of the current contact select the address item from the list and tap on the pen icon in the main title frame or tap on the house icon in the list. When the icon button is tapped, the application navigates to contact edit detail page, where the user can edit the contact details.

To **make a phone call** to the contact, select the phone number from the list and tap on the telephone icon in the main title frame or tap on the telephone icon in the list. When the icon button is tapped, the application tries to make a phone call if the device has phone call capabilities. When the device does not support doing phone calls, app tries to make a call using skype. A message is shown to the user to confirm the selected action. When the user confirms the action a phone call is initiated.

To **send email** to the contact, select the email address from the list and tap on the envelope icon in the main title frame or tap on the envelope in the list. When the icon button is tapped, default email editor is opened and the user can type the email content



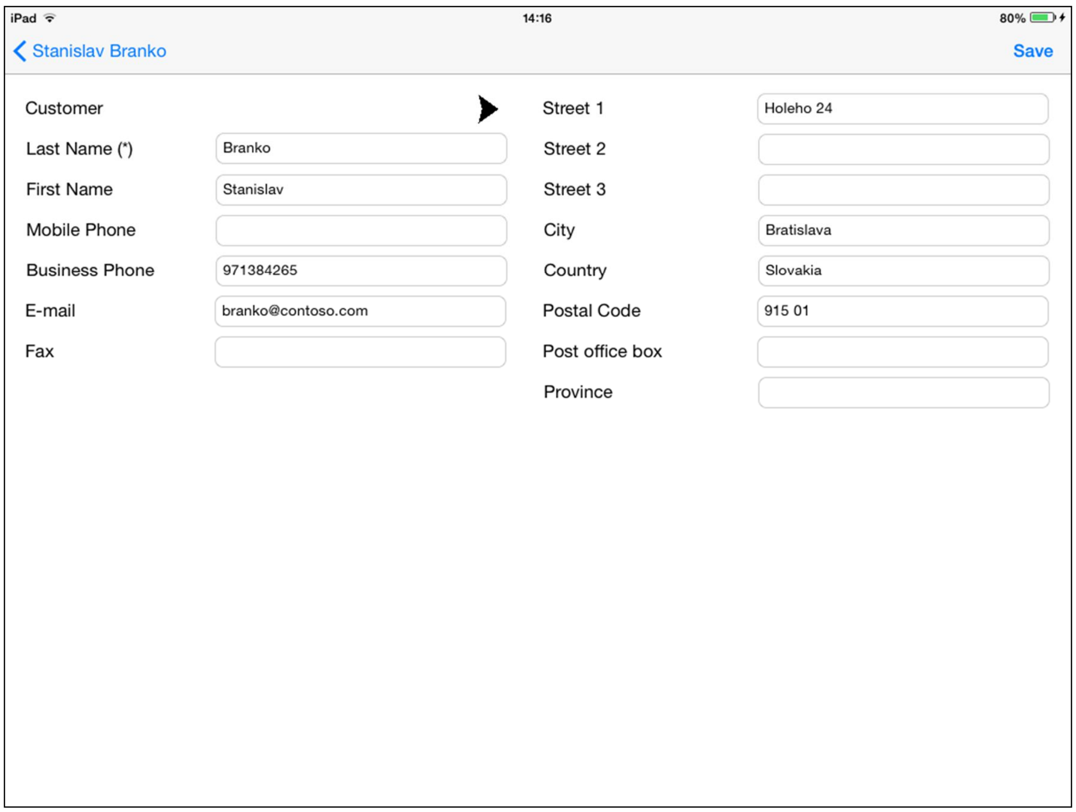

iPad
9:42
77%
Contacts
Stanislav Branko
Holeho 24
Bratislava
915 01
Slovakia
971384265
branko@contoso.com
Info
E-mail
Fax
Phone Call
Task
Contacts
Appointment
More


iPad
9:42
77%
Contacts
Stanislav Branko
Holeho 24
Bratislava
915 01
Slovakia
971384265
branko@contoso.com
Info
E-mail
Fax
Phone Call
Task
Contacts
Appointment
More

11.6.2 Contact detail edit page

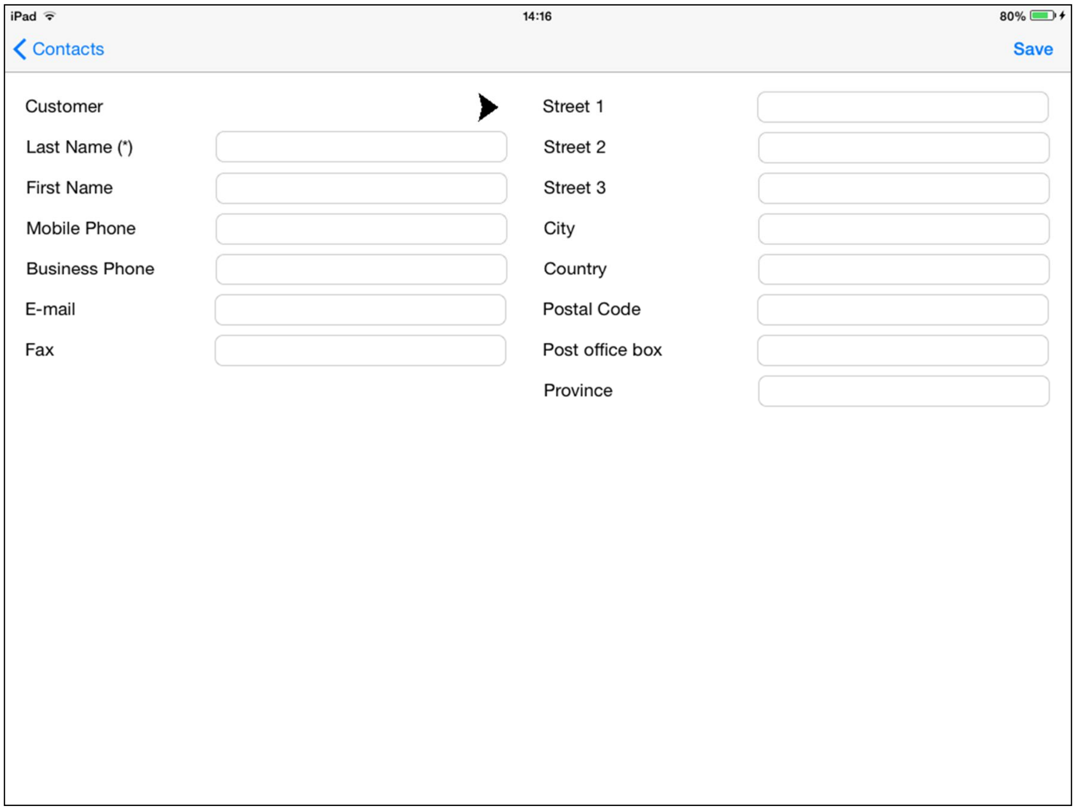
Contact detail edit page displays information about a specific contact. The user can edit the record by modifying the content of the rows. To save the modified data and update the CRM contact tap on the "Save" button in the title frame.

The contact is immediately modified and stored in the local database. The CRM contact is updated via an update query (when online mode is selected) or an update query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

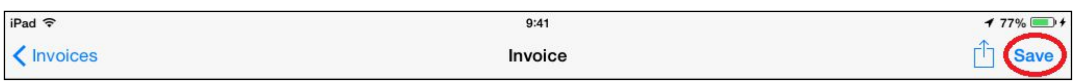


11.6.3 Create new contact

To create new contact, tap on the plus icon and contact detail edit page with new blank record will be displayed. The user can edit the record as required.



To save the newly created contact, tap on the "Save" button in the title frame. The contact is immediately created and stored in the local database. The CRM contact is created via an insert query (when online mode is selected) or an insert query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

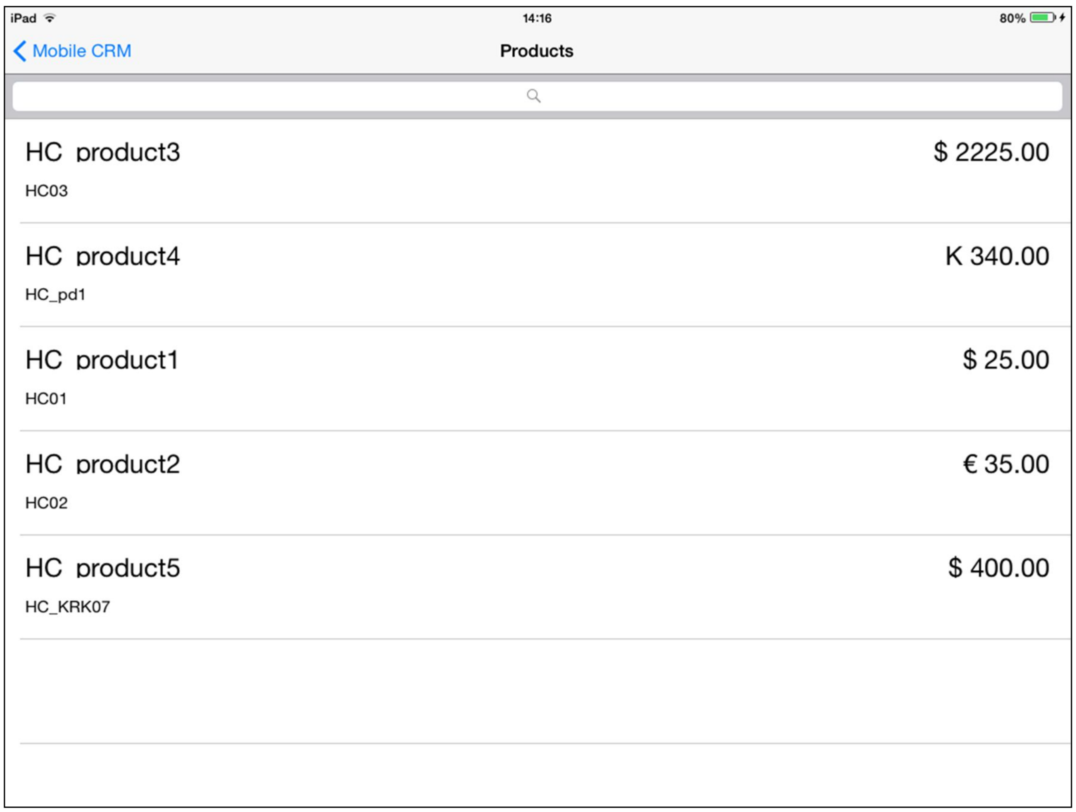


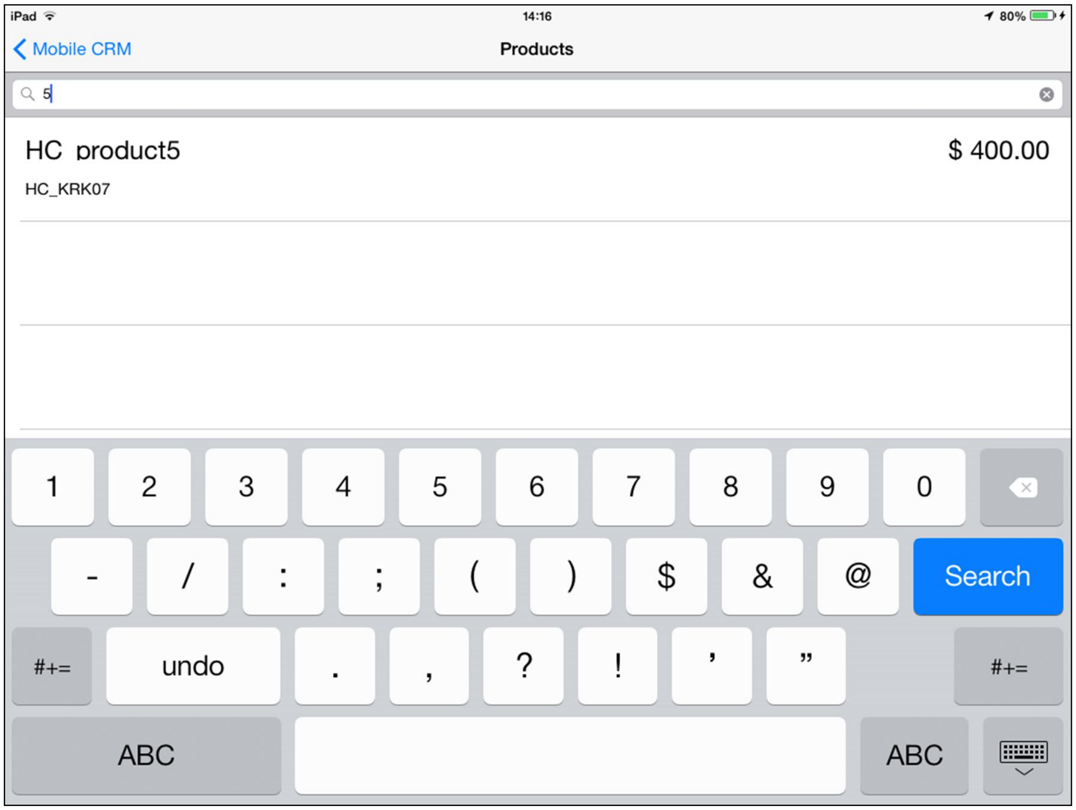
11.7 Products page

Products page contains information about the available CRM products. To display details about a specific product, select the product from the list by tapping on the item.

The user can use filter to look for a specific product by typing a search string into the search bar. The user can search by product name or product id.

The user can sort the list of products according to personal preference. To sort the list choose the preferred sort type and the list will be sorted.




iPad
14:16
80%
Mobile CRM
Products
5
HC_product5
$ 400.00
HC_KRK07
1 2 3 4 5 6 7 8 9 0
- / : ; ( ) $ & @ Search
#+= undo . , ? ! ' " #+=
ABC ABC

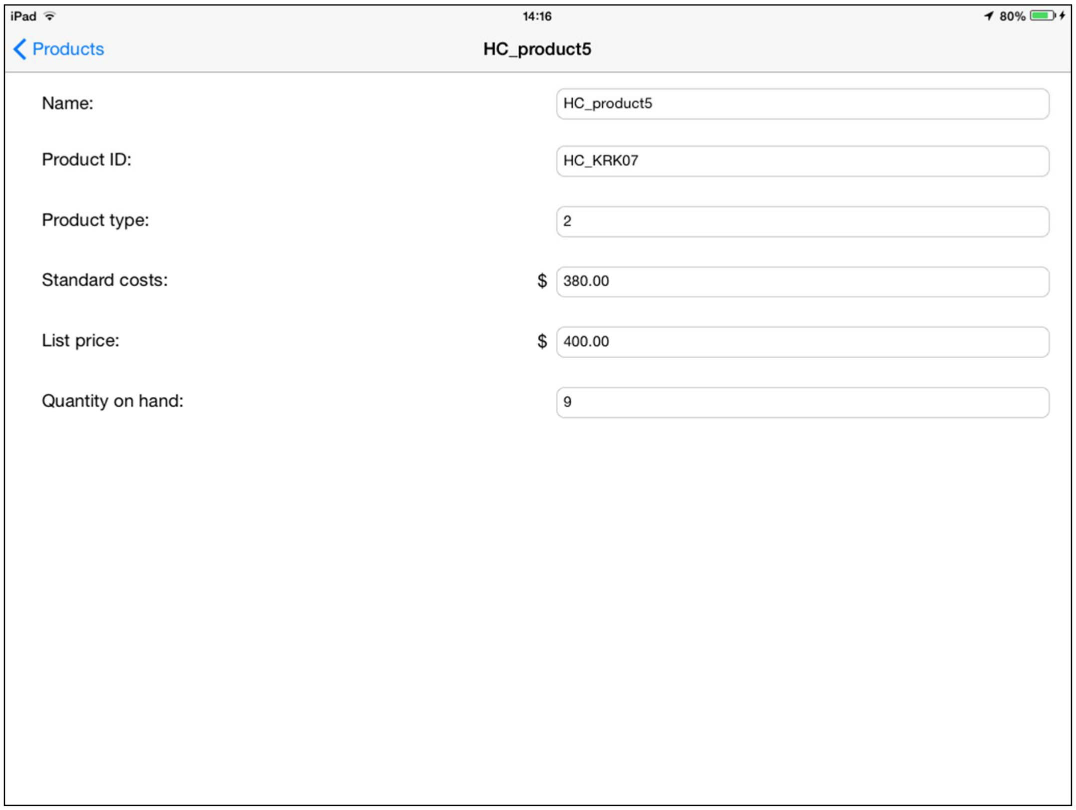
11.7.1 Product detail page

The product detail page displays detailed information about the selected product. Depending on the access rights of the user, the user is allowed or prohibited to edit the product. (Not available in current version). By default the user is allowed only to view the product details.

To save the changes made to the product tap on the floppy disk icon. The product is immediately modified and stored in the local database. The CRM product is updated via an update query (when online mode is selected) or an update query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

11.7.2 Create new product

To create new product, tap on the plus icon and product detail page with new blank record will be displayed. The user can edit the record as required. (Currently not available)



To save the newly created product, tap on "Save" button in the title frame. The product is immediately created and stored in the local database. The CRM product is created via an insert query (when online mode is selected) or an insert query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

11.8 Activities page

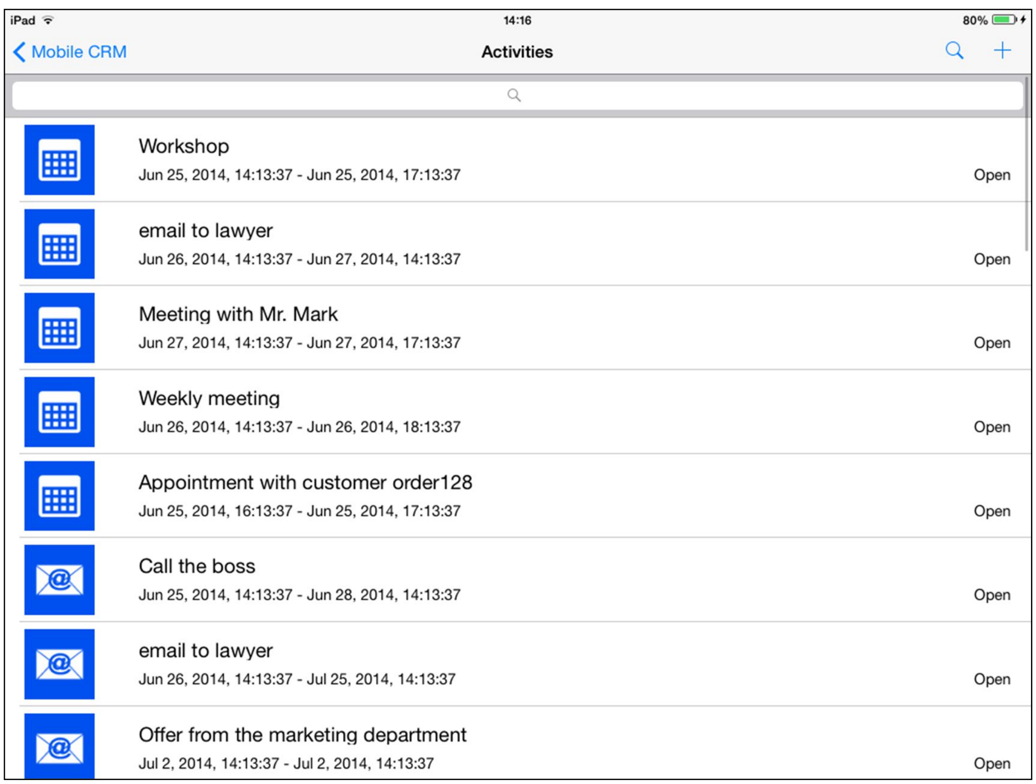
Activities page contains information about the activities. The user can choose to view all activities including the activities of other users or display only the user owned activities. These settings can be changed on the settings page.

There are several activity types listed in the list of activities. Each activity type has its own icon to identify the type of activity.

Currently supported activities displayed in the list are:

- Appointments
- Tasks
- E-mails
- Phone calls
- Faxes
- Letters
- Service appointment

To display details about a specific activity, select the activity from the list by tapping on the item.



11.8.1 Activity filter

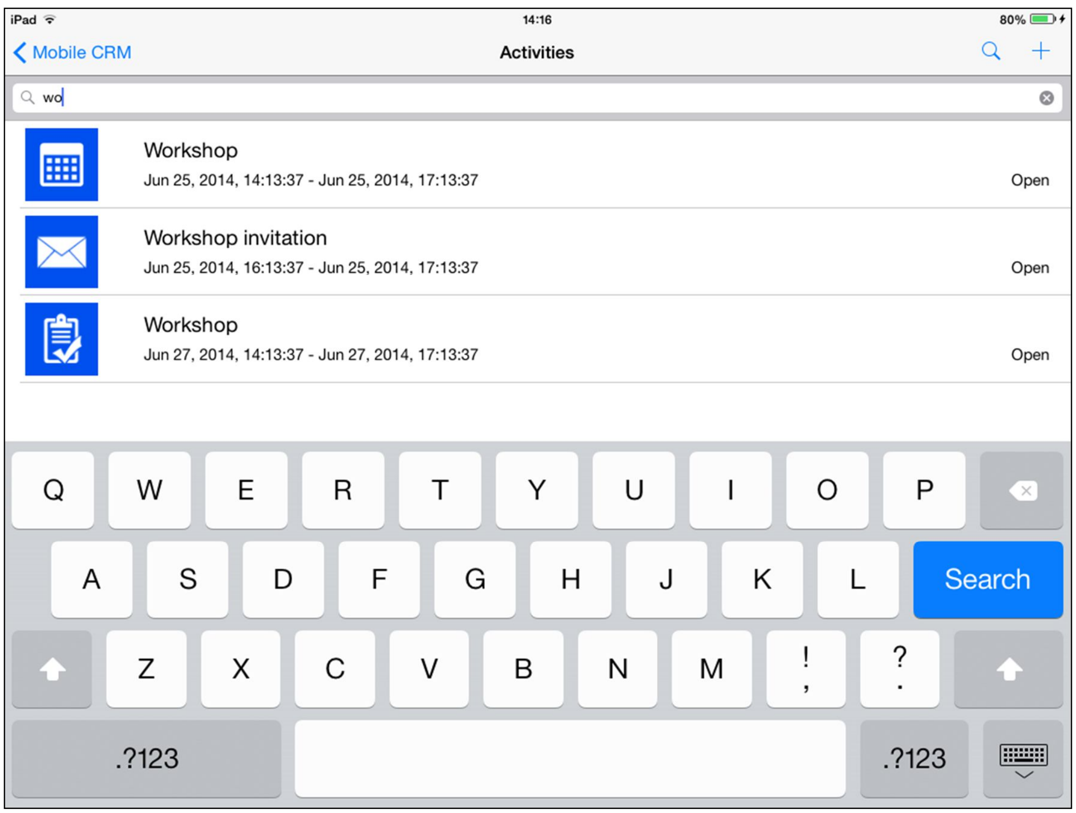
Mobile CRM application supports filtering of activities to help the user identify and search for specific activities in the list.

There are two possibilities for the user to filter the data.

- Filter data by typing a search string into search box
- Filter data by tapping on the magnifying glass

11.8.1.a Filter data by typing a search string into search box

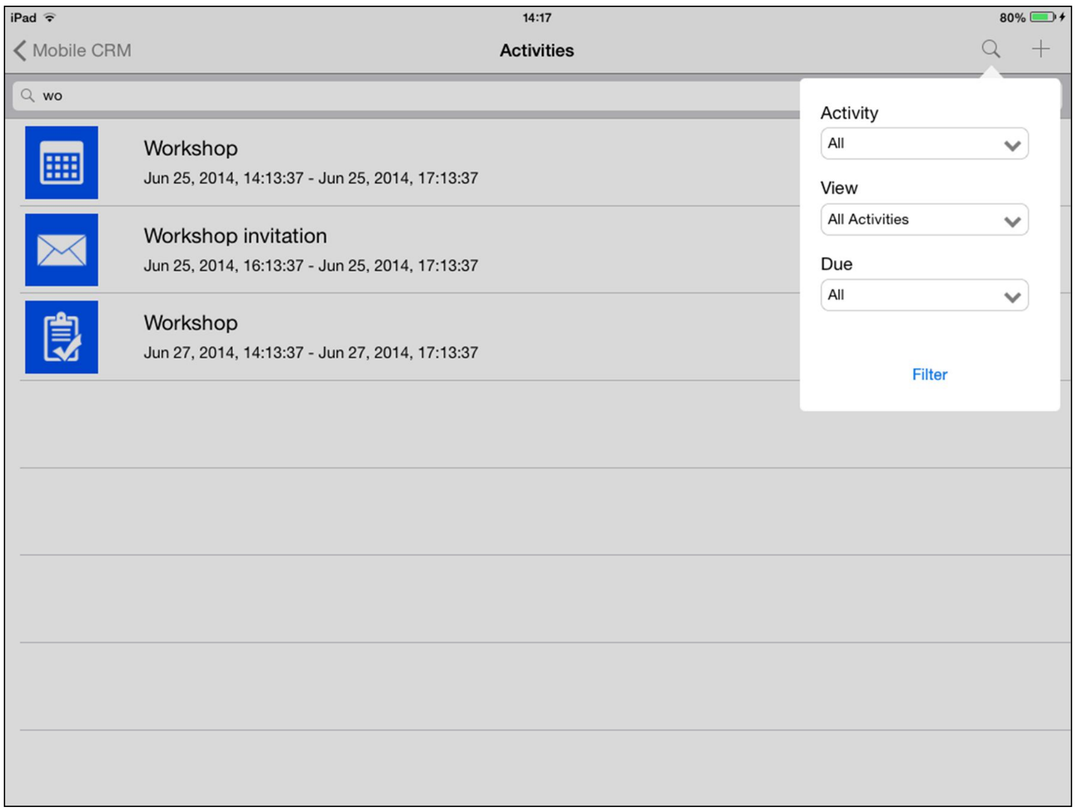
When filtering data using this option, type in a search string into the search box. The list of activities is filtered and only activities that match with the search string appear.



11.8.1.b Filter data by tapping on the magnifying glass

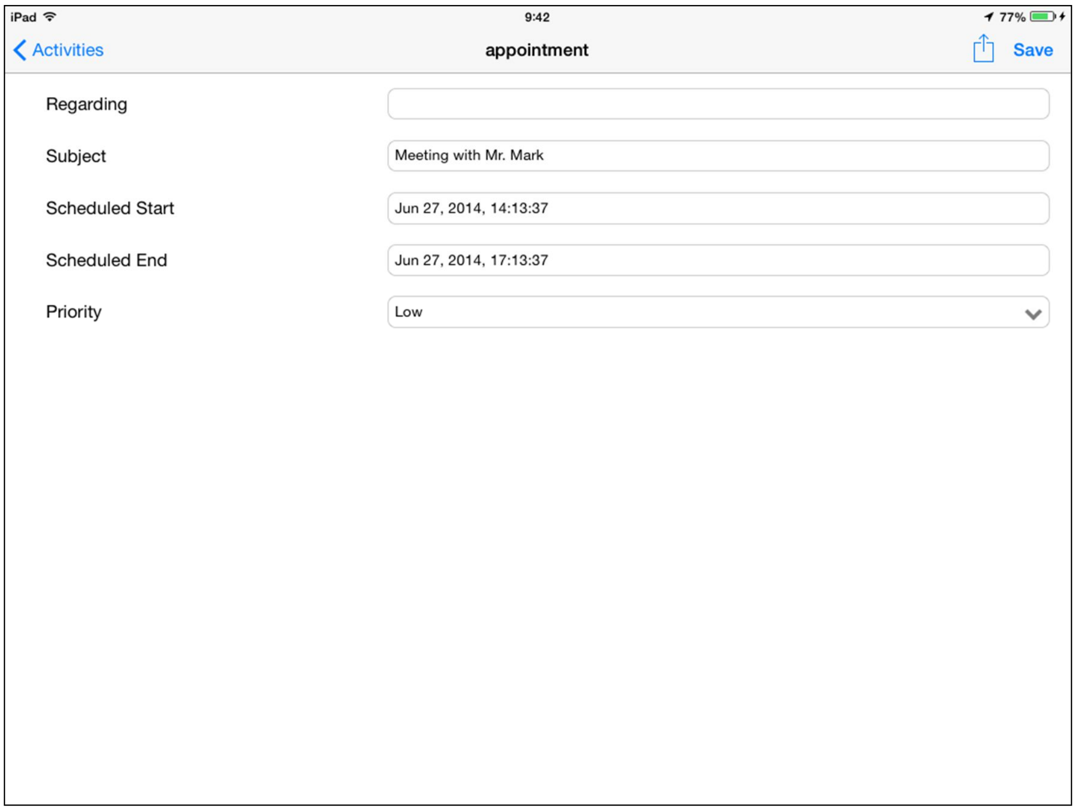
When filtering data using this option, tap on the magnifying glass button. A popup menu with search condition appears and the user can choose what type of activity to display as well as set the due date condition for the activities. To apply the selected search condition, tap on the "Filter" button. When tapped, the list of activities is filtered and only activities that match with the search condition appear.

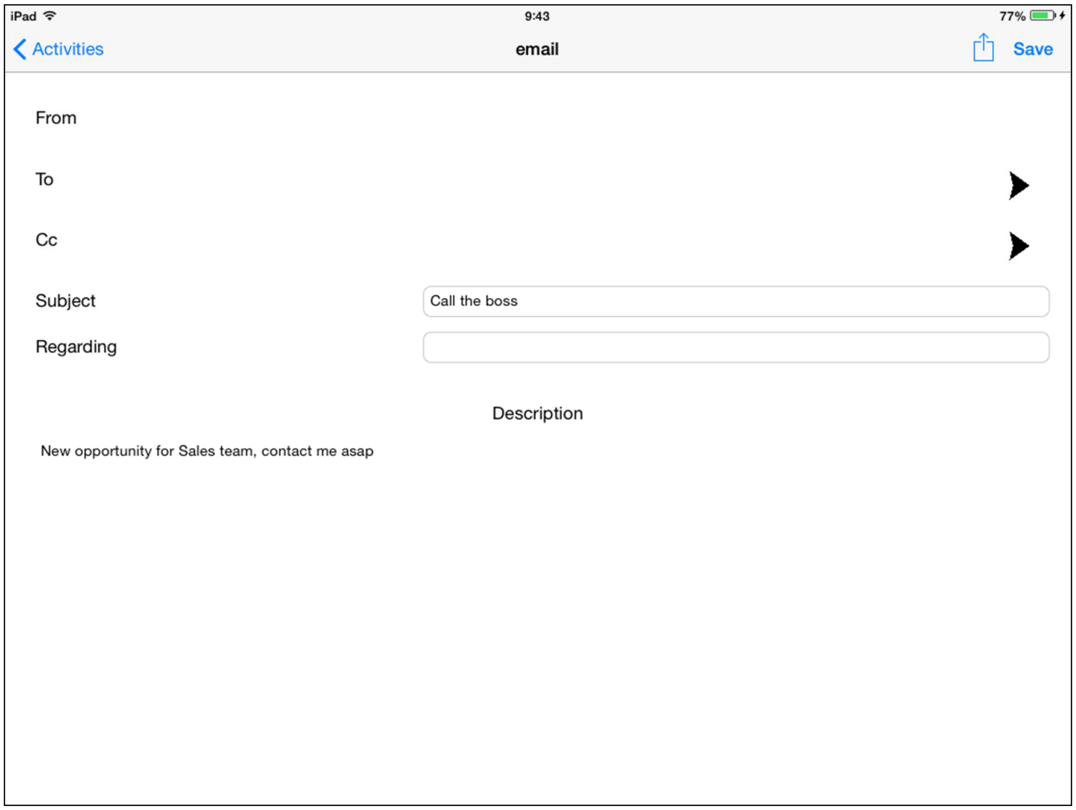
When the filtered activities contain too many data, the user can narrow down the list by additional filtering of the records by using the magnifying glass filter method.

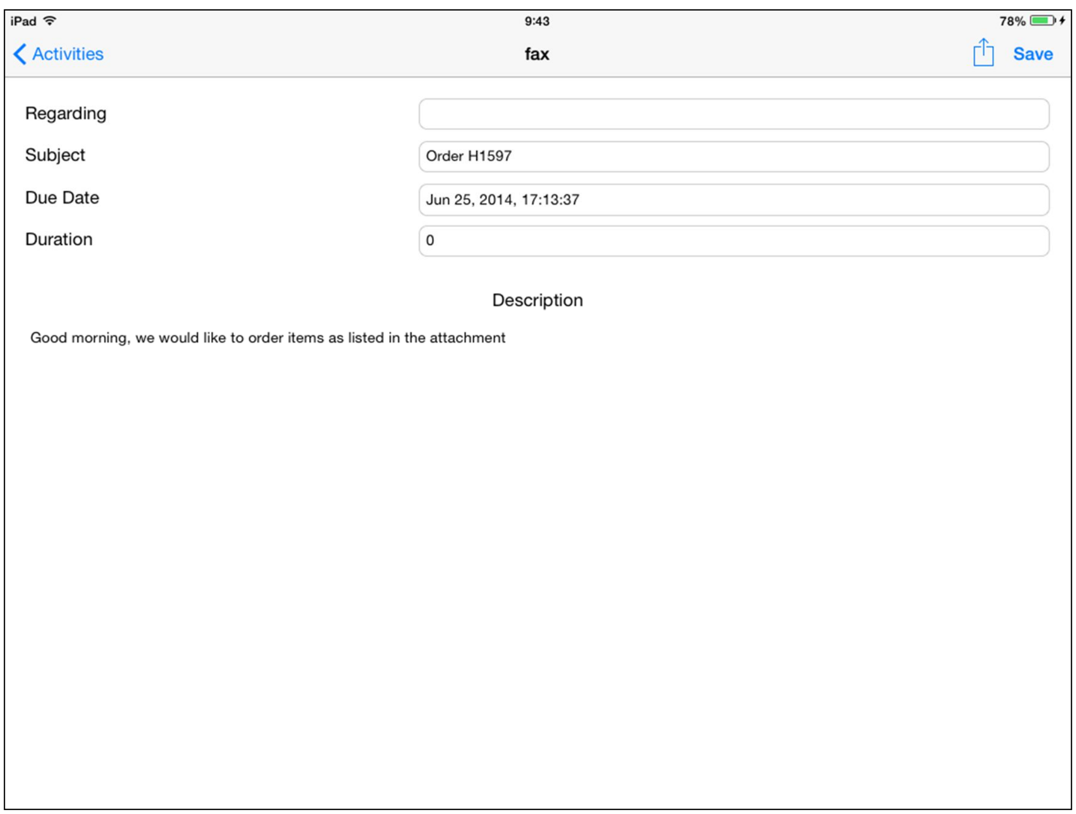


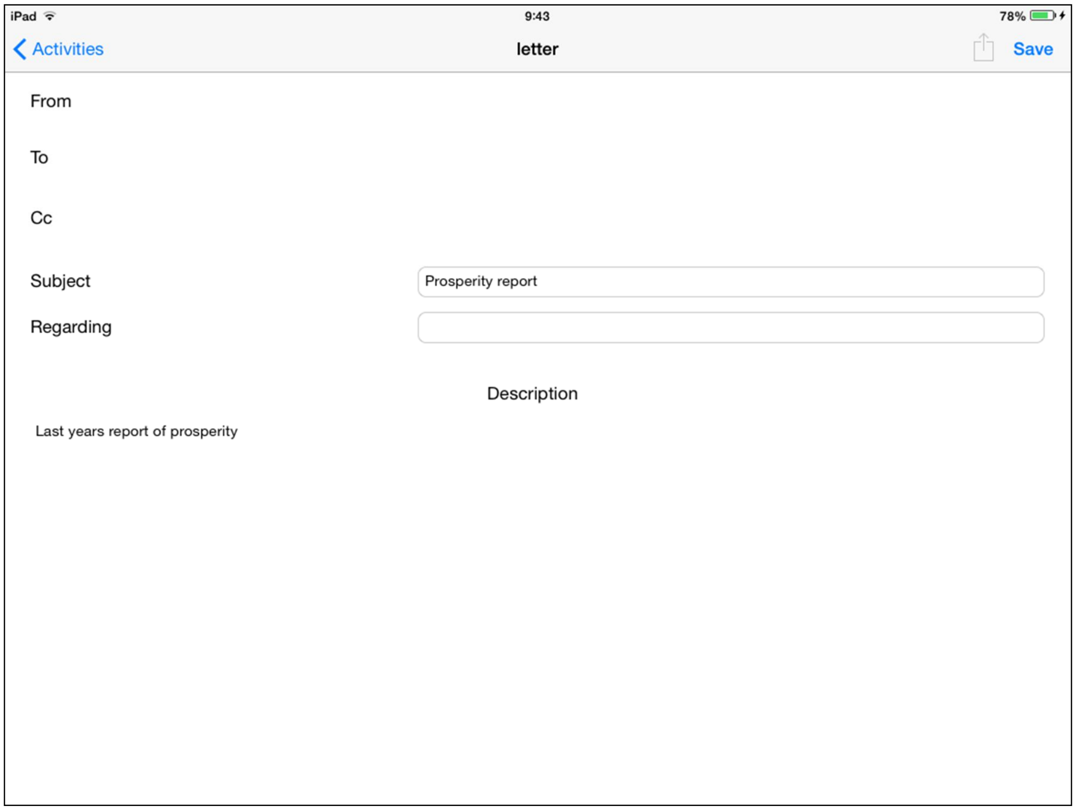
11.8.2 Activity detail page

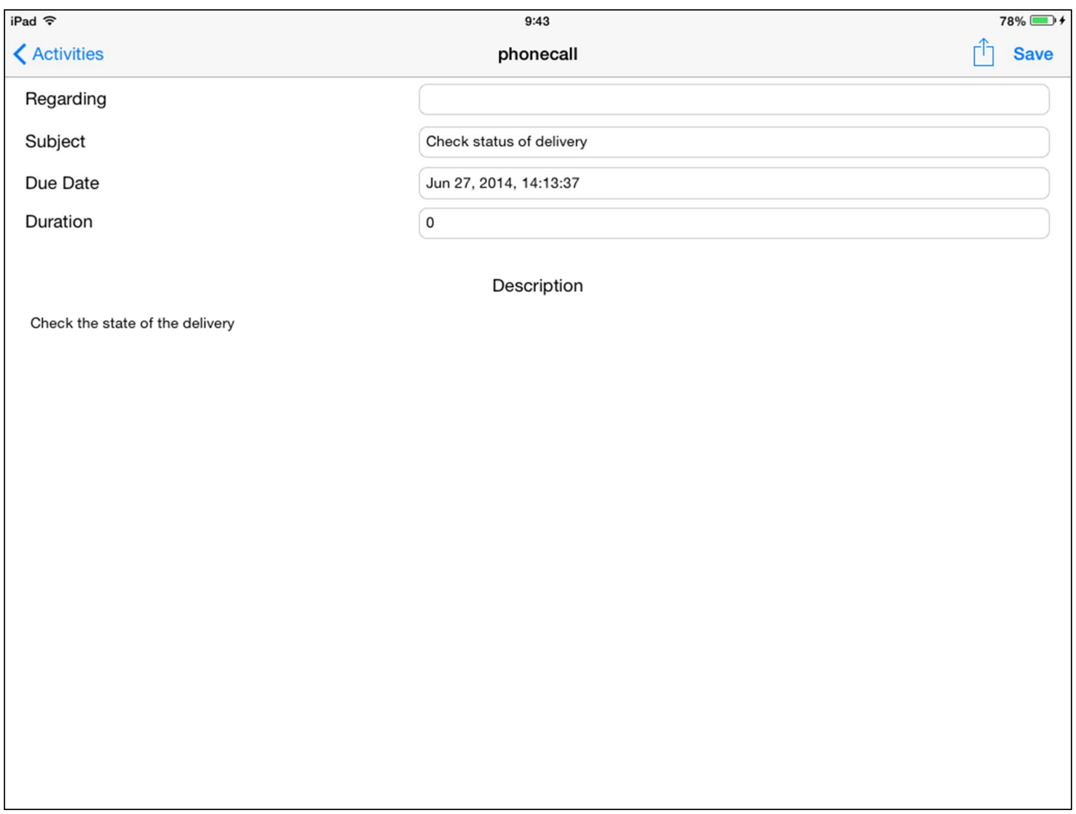
Each activity detail page displays information about a specific activity type. Each activity type has different layout according to the content of the activity. The user can edit the record by modifying the content of the rows.

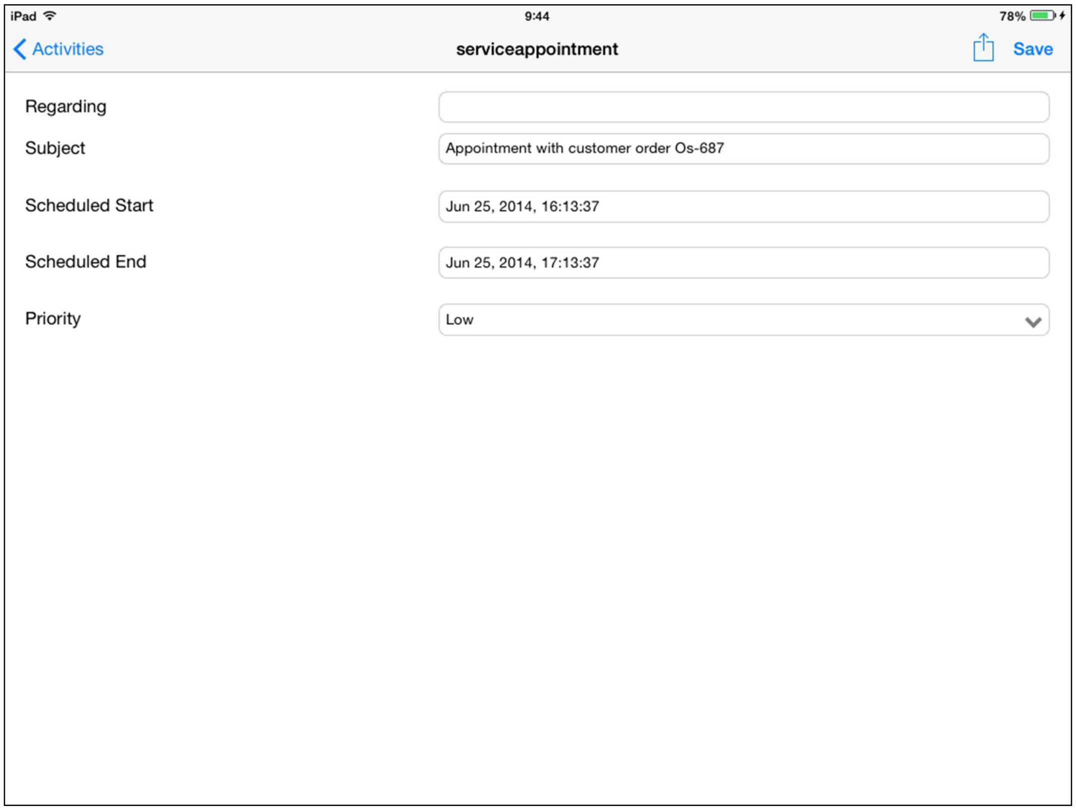


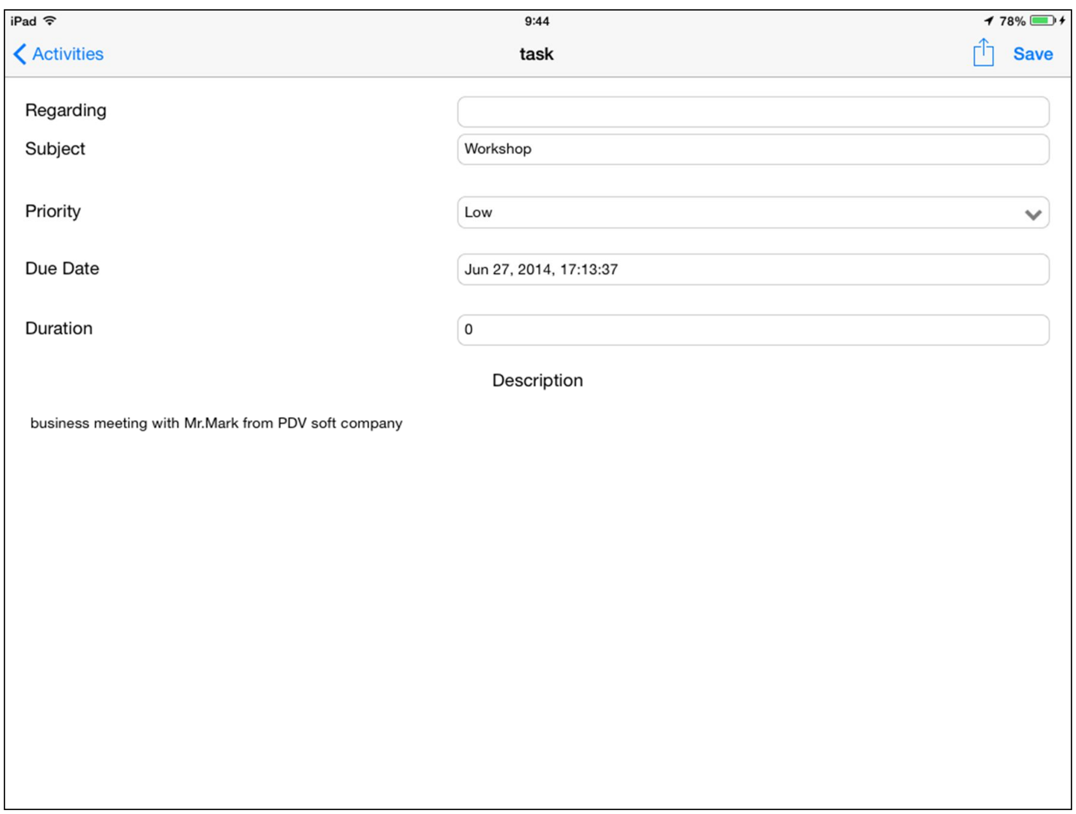

iPad
9:43
77%
Activities
email
Save
From
To
Cc
Subject
Call the boss
Regarding
Description
New opportunity for Sales team, contact me asap


iPad
9:43
78%
Activities
fax
Save
Regarding
Subject
Order H1597
Due Date
Jun 25, 2014, 17:13:37
Duration
0
Description
Good morning, we would like to order items as listed in the attachment


iPad
9:43
78%
Activities
letter
Save
From
To
Cc
Subject
Prosperity report
Regarding
Description
Last years report of prosperity

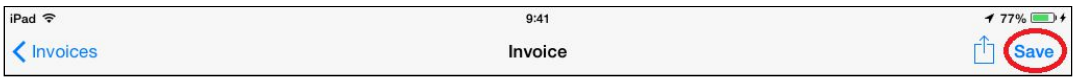

iPad
9:43
78%
Activities
phonecall
Save
Regarding
Subject
Check status of delivery
Due Date
Jun 27, 2014, 14:13:37
Duration
0
Description
Check the state of the delivery


iPad
9:44
78%
Activities
serviceappointment
Save
Regarding
Subject
Appointment with customer order Os-687
Scheduled Start
Jun 25, 2014, 16:13:37
Scheduled End
Jun 25, 2014, 17:13:37
Priority
Low


iPad
9:44
78%
Activities
task
Save
Regarding
Subject
Workshop
Priority
Low
Due Date
Jun 27, 2014, 17:13:37
Duration
0
Description
business meeting with Mr.Mark from PDV soft company

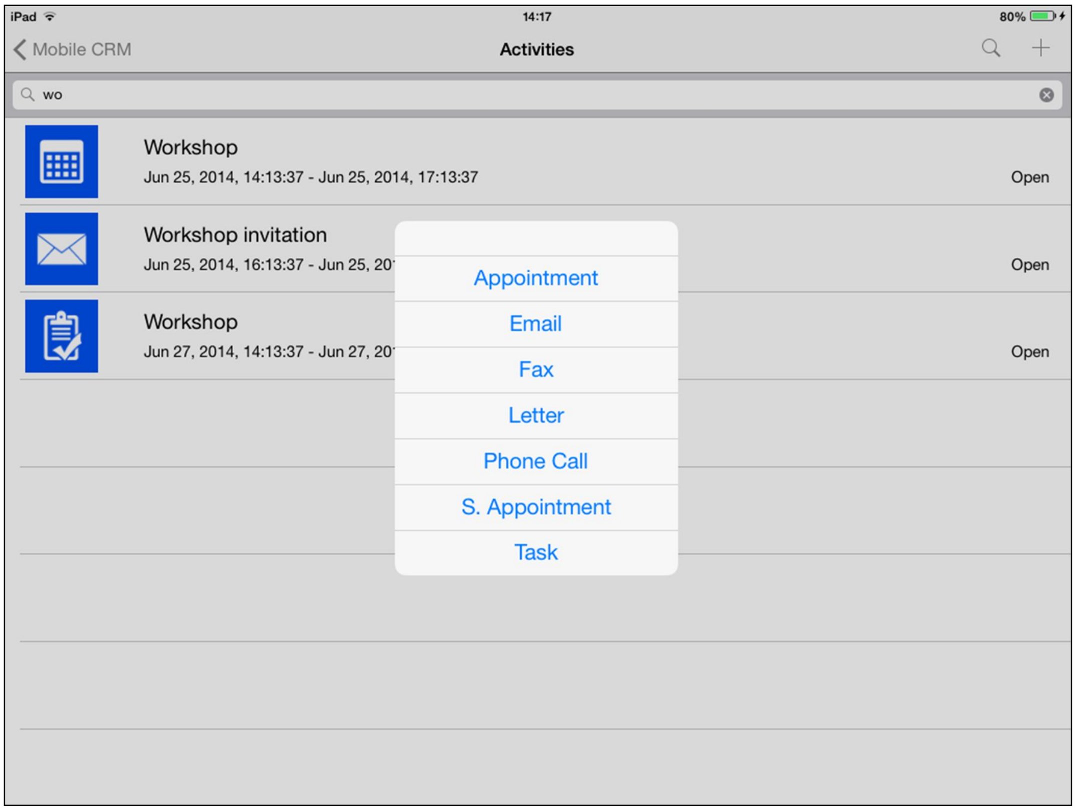
When the displayed activity has additional functionality enabled, the additional functionality icon is displayed on the title frame. To display the list of additional actions for each activity, tap on the additional actions icon. A context menu appears and the user can choose the action to execute.

To save the modified data and update the CRM activity tap on the “Save” button in the title frame. The activity is immediately modified and stored in the local database. The CRM activity is updated via an update query (when online mode is selected) or an update query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

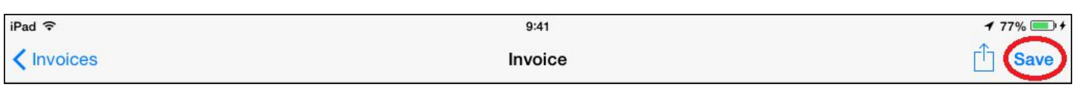


11.8.3 Create new activity

To create new activity, tap on the plus icon and a context menu with possible options will be displayed. Choose the type of activity to be created by tapping on the activity name. When tapped on the activity name the specific type activity detail page with new blank record will be displayed. The user can edit the record as required.



To save the newly created activity, tap on the "Save" button in the title frame. The activity is immediately created and stored in the local database. The CRM activity is created via an insert query (when online mode is selected) or an insert query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

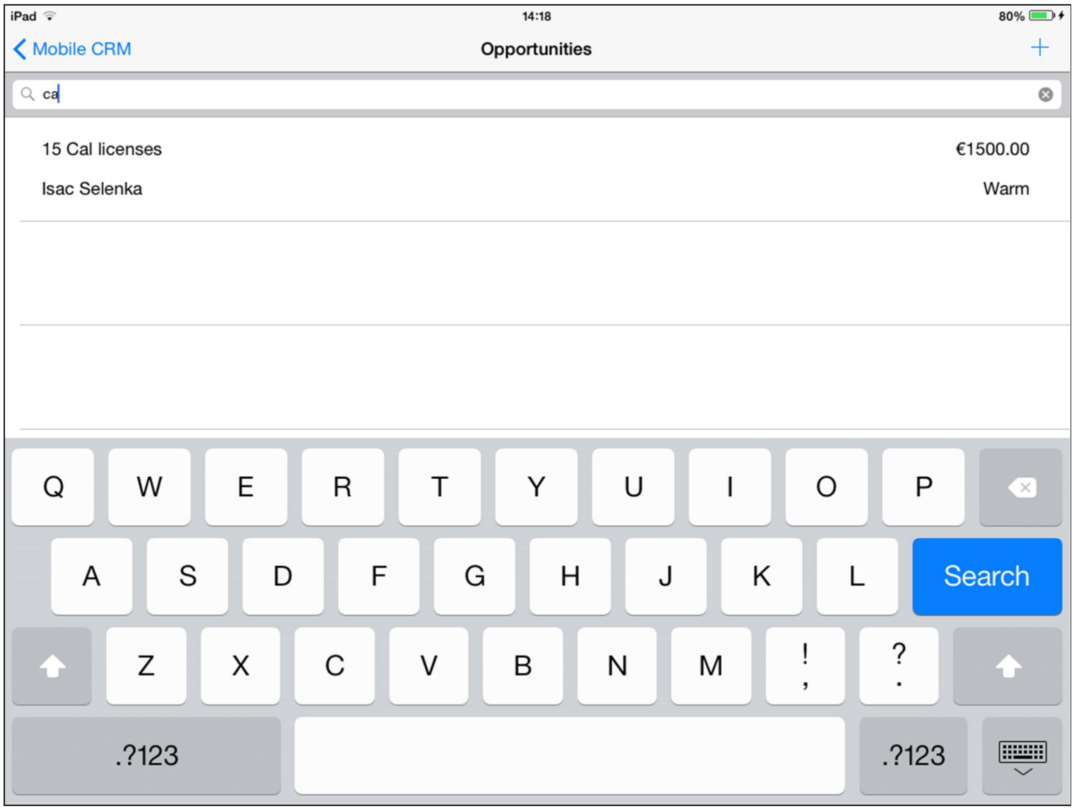


11.9 Opportunities page

Opportunities page contains information about the available CRM opportunities. To display details about a specific opportunity, select the opportunity from the list by tapping on the item.

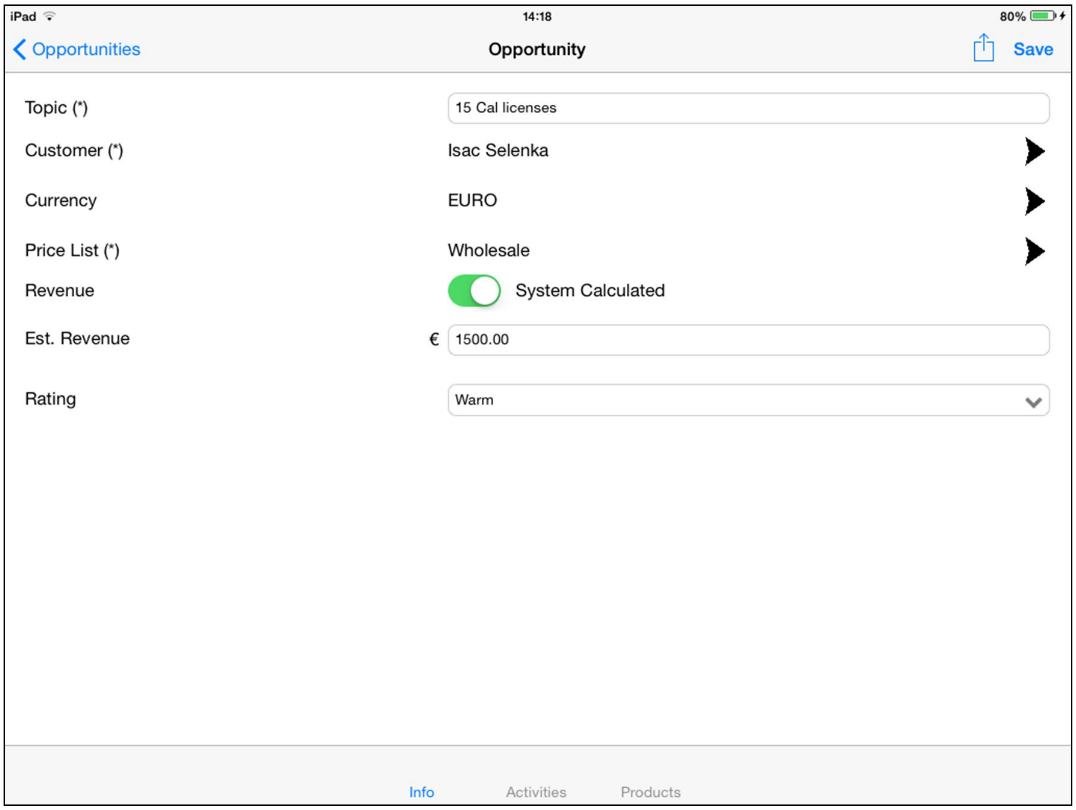
The user can use filter to look for a specific opportunity by typing a search string into the search box.

The user can sort the list of opportunities according to personal preference. To sort the list choose the preferred sort type and the list will be sorted.

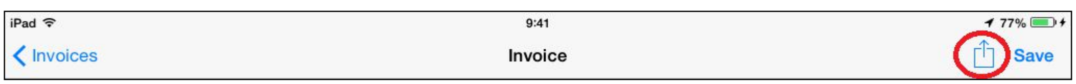


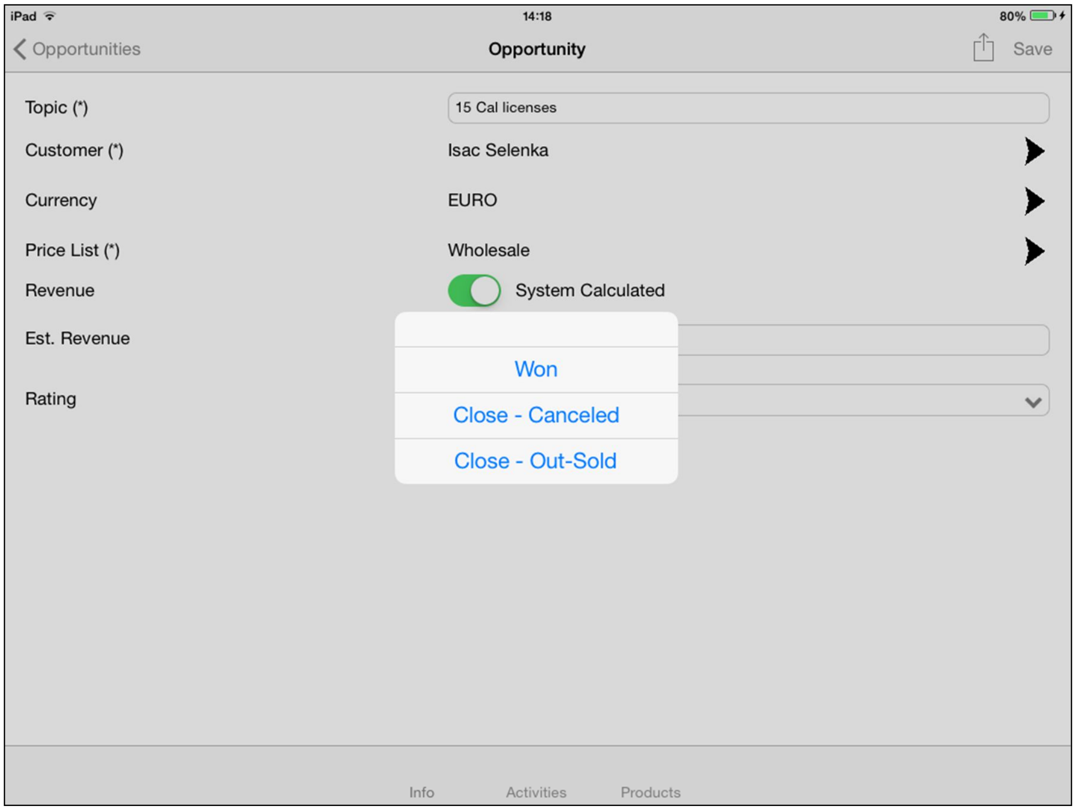
Opportunity detail page

The opportunity detail page displays detailed information about the selected opportunity. The user can modify the opportunity by changing the data in the specific fields.

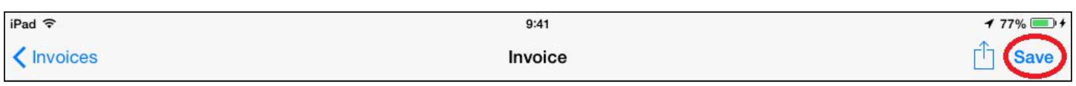


To display the list of additional actions, tap on the additional actions icon. A context menu appears and the user can choose the action to execute.



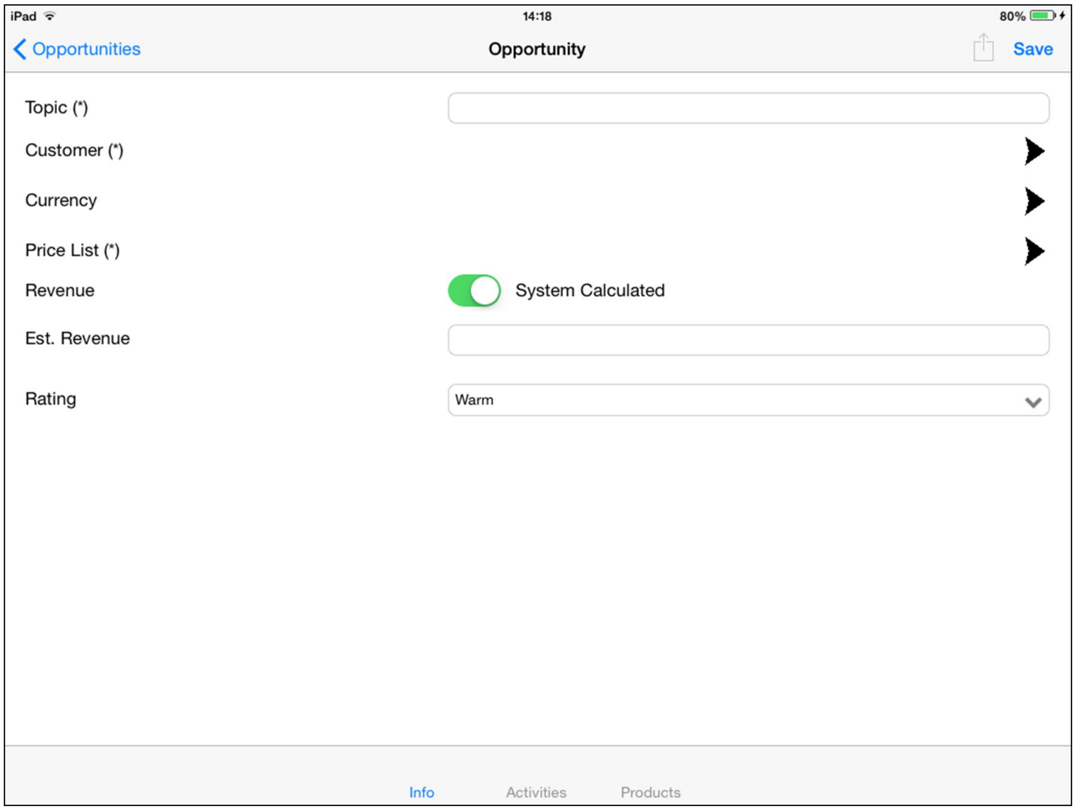


To save the modified data and update the CRM opportunity, tap on the "Save" button in the title frame. The opportunity is immediately modified and stored in the local database. The CRM opportunity is updated via an update query (when online mode is selected) or an update query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

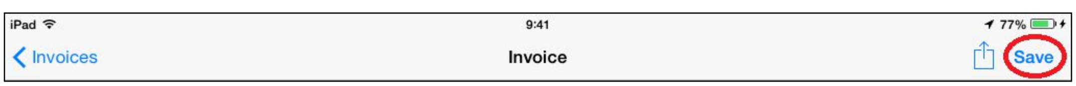


11.9.1 Create new opportunity

To create new opportunity, tap on the plus icon and opportunity detail page with new blank record will be displayed. The user can edit the record as required.



To save the newly created opportunity, tap on the “Save” button in the title frame. The record is immediately created and stored in the local database. The CRM opportunity is created via an insert query (when online mode is selected) or an insert query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

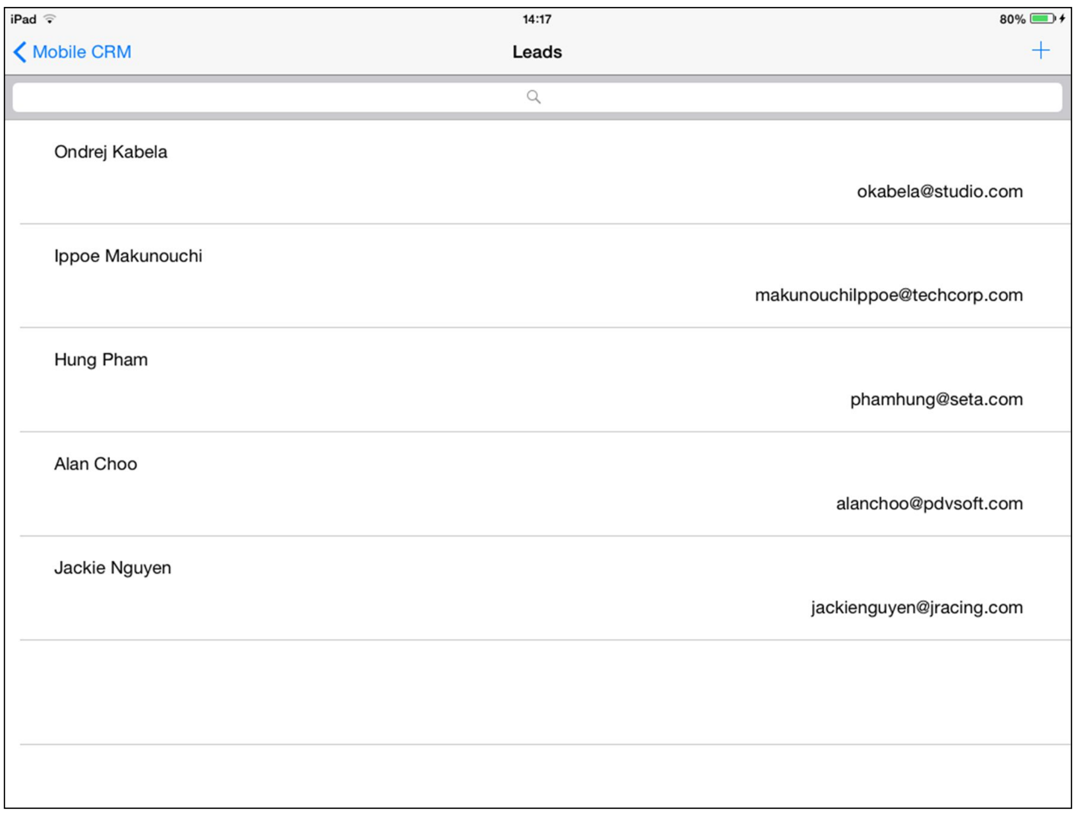


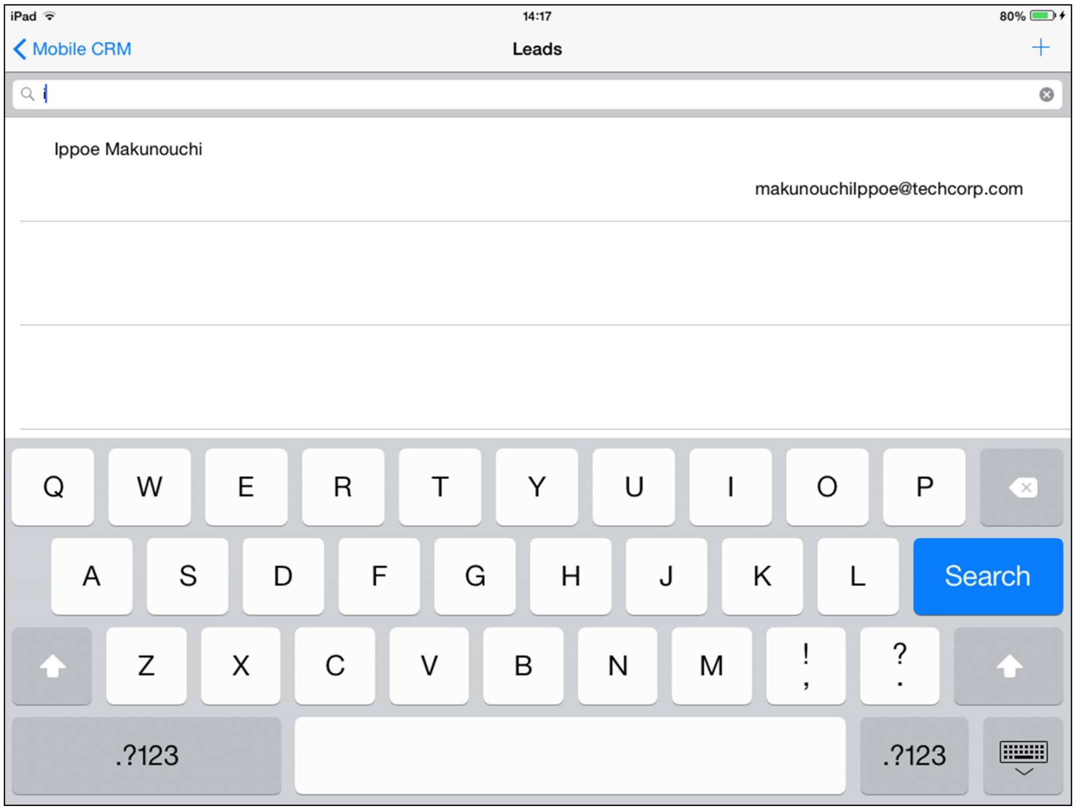
11.10 Leads page

Leads page contains information about the available CRM leads. To display details about a specific lead, select the lead from the list by tapping on the item.

The user can use filter to look for a specific lead record by typing a search string into the search bar.

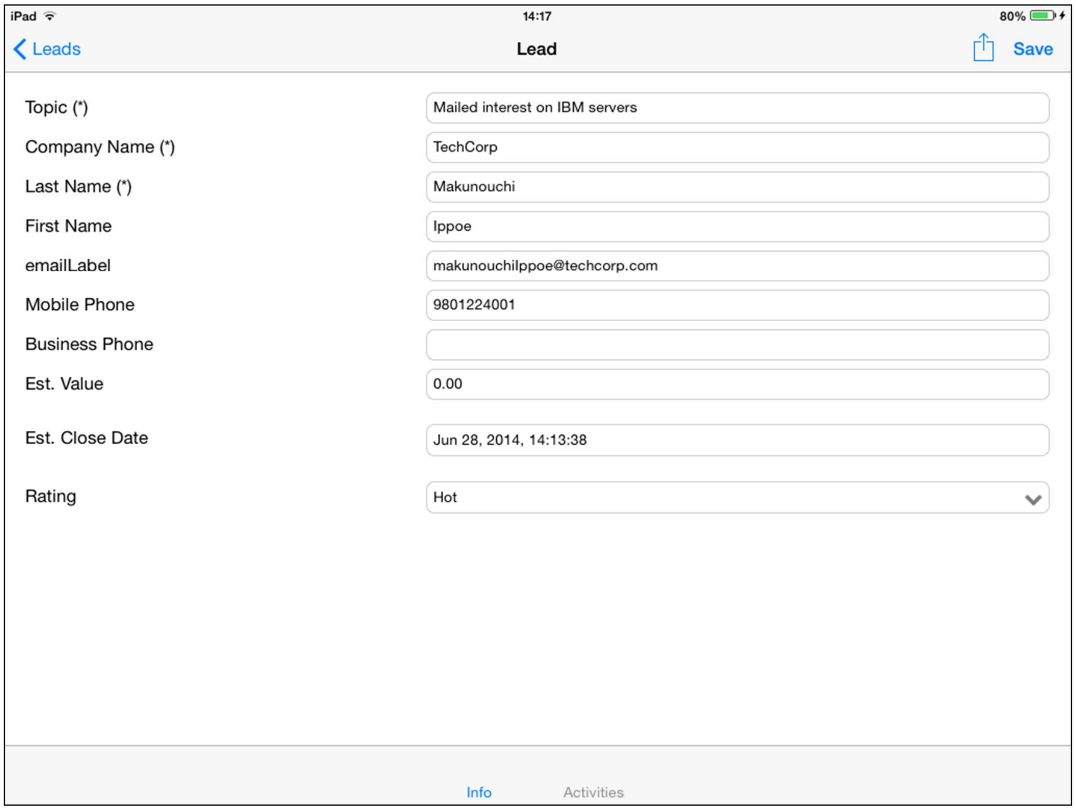
The user can sort the list of leads according to personal preference. To sort the list choose the preferred sort type and the list will be sorted.




iPad
14:17
80%
Mobile CRM
Leads
Ippoe Makunouchi
makunouchilppoe@techcorp.com
Search
.?123

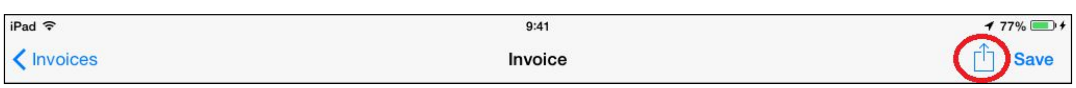
11.10.1 Lead detail page

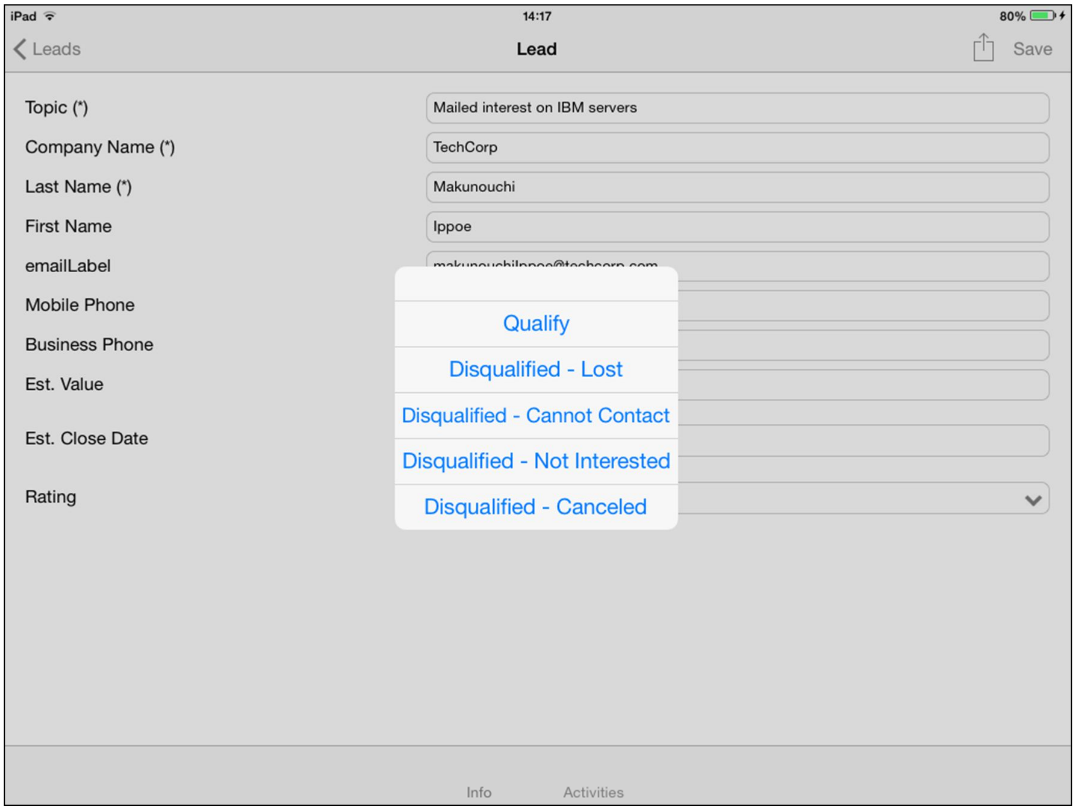
The Lead detail page displays detailed information about the selected lead. To modify the record change the specific fields of the record as required.



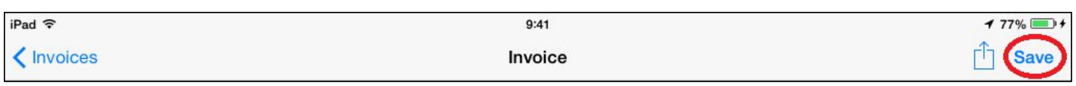
The lead detail page supports sending emails and making phone or skype calls depending on the devices capability to make phone calls. The user can send email or make a call by tapping on image icon next to email field or phone field.

To display the list of additional actions, tap on the additional actions icon. A context menu appears and the user can choose the action to execute.



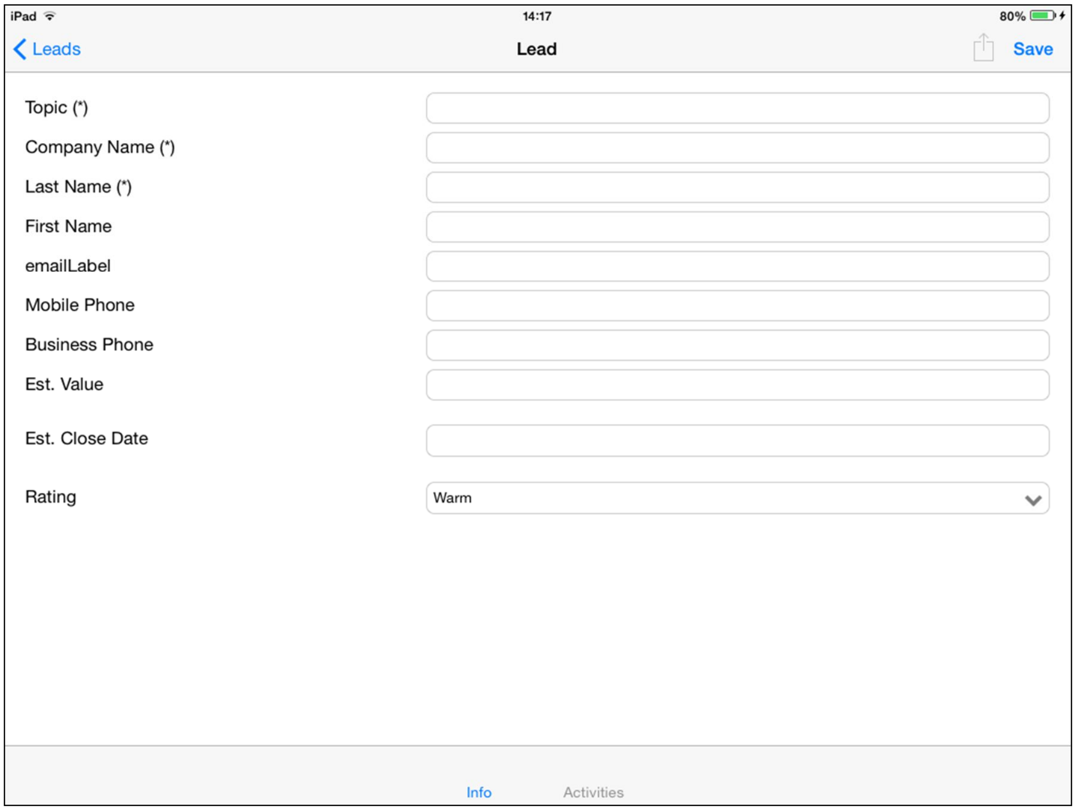


To save the modified data and update the CRM Lead, tap on "Save" button in the title frame. The Lead is immediately modified and stored in the local database. The CRM Lead is updated via an update query (when online mode is selected) or an update query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

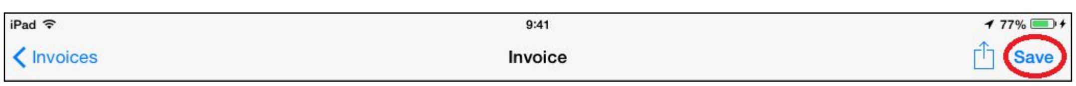


11.10.2 Create new lead

To create new lead, tap on the plus icon and lead detail page with new blank record will be displayed. The user can edit the record as required.



To save the newly created lead, tap on the "Save" button in the title frame. The lead is immediately created and stored in the local database. The CRM lead is created via an insert query (when online mode is selected) or an insert query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

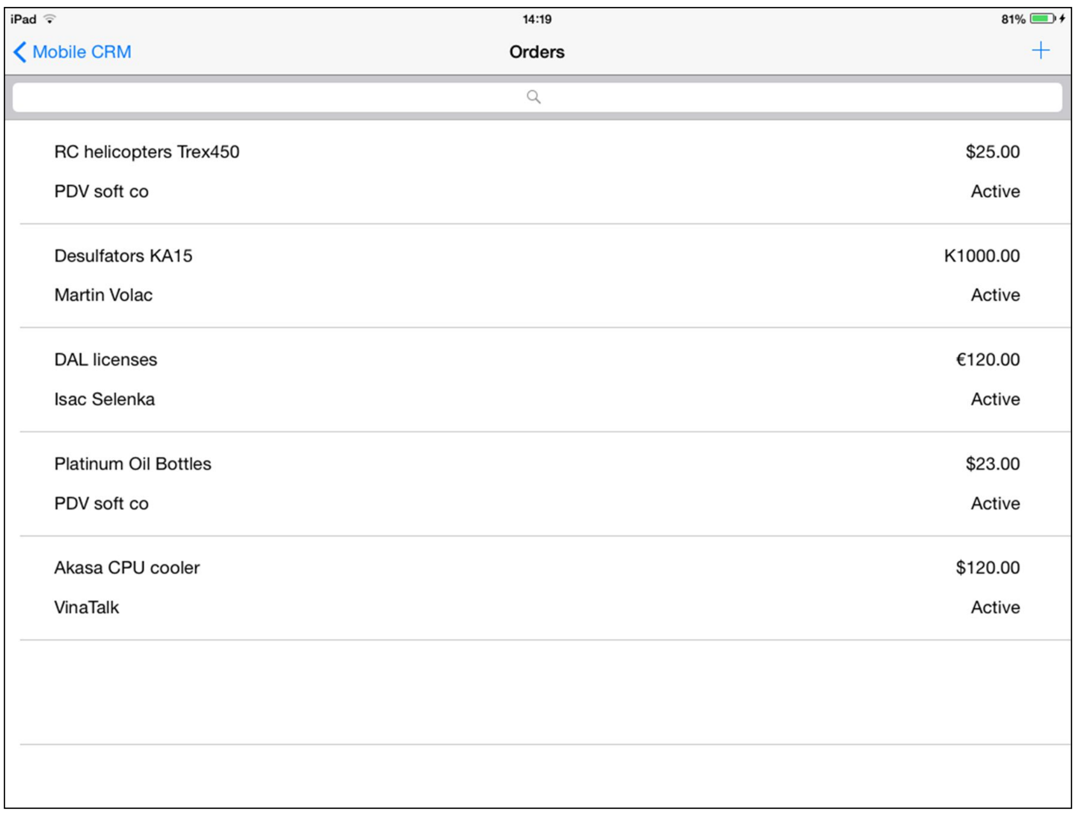


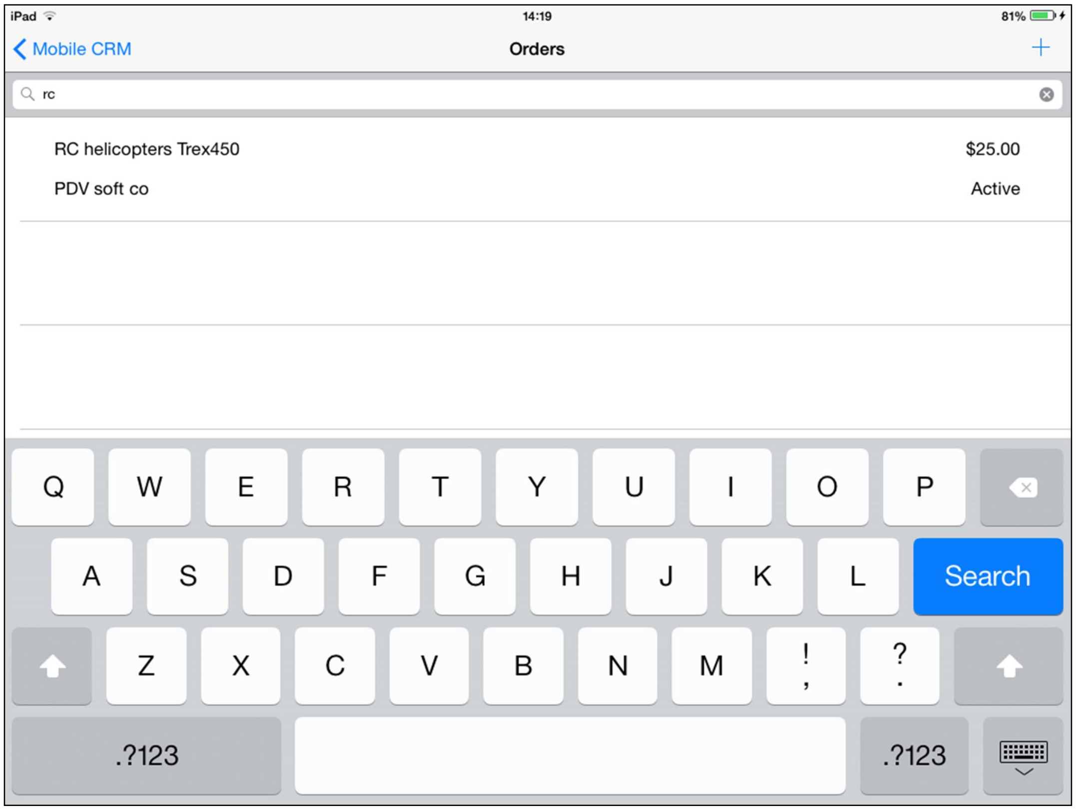
11.11 Orders page

Orders page contains information about the available CRM orders. To display details about a specific order, select the order from the list by tapping on the item.

The user can use filter to look for a specific order by typing the search string into the search box.

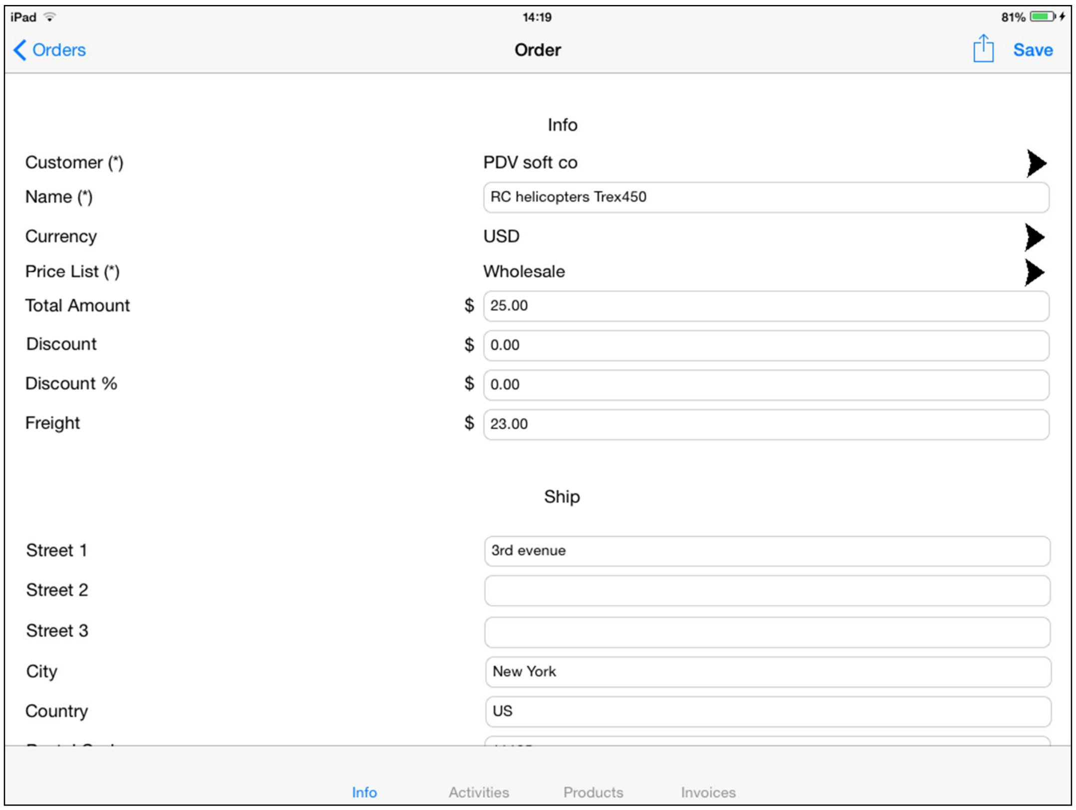
The user can sort the list of orders according to personal preference. To sort the list choose the preferred sort type and the list will be sorted.



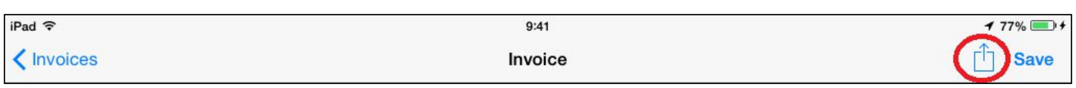

iPad
14:19
81%
Mobile CRM
Orders
rc
RC helicopters Trex450
$25.00
PDV soft co
Active
Search
.?123

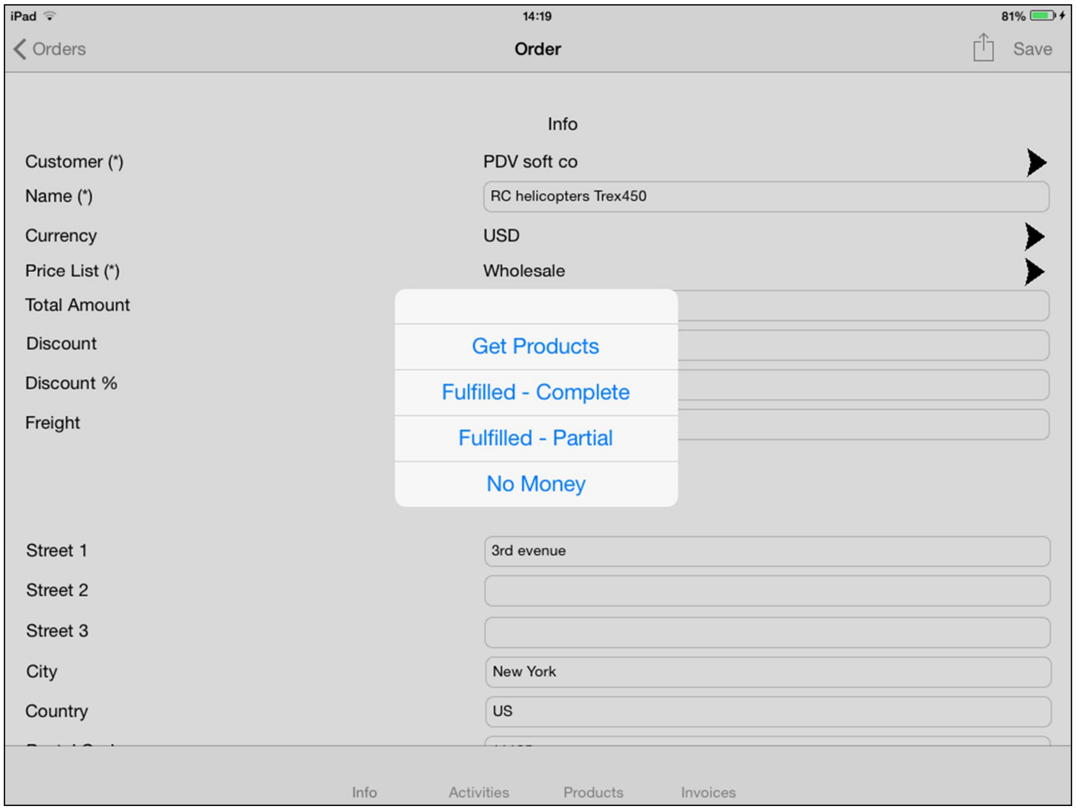
11.11.1 Order detail page

The order detail page displays detailed information about the selected order. Depending on the access rights of the user, the user is allowed or prohibited to edit the order. (Not yet available)

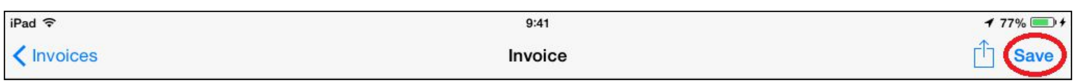


To display the list of additional actions, tap on the additional actions icon. A context menu appears and the user can choose the action to execute.



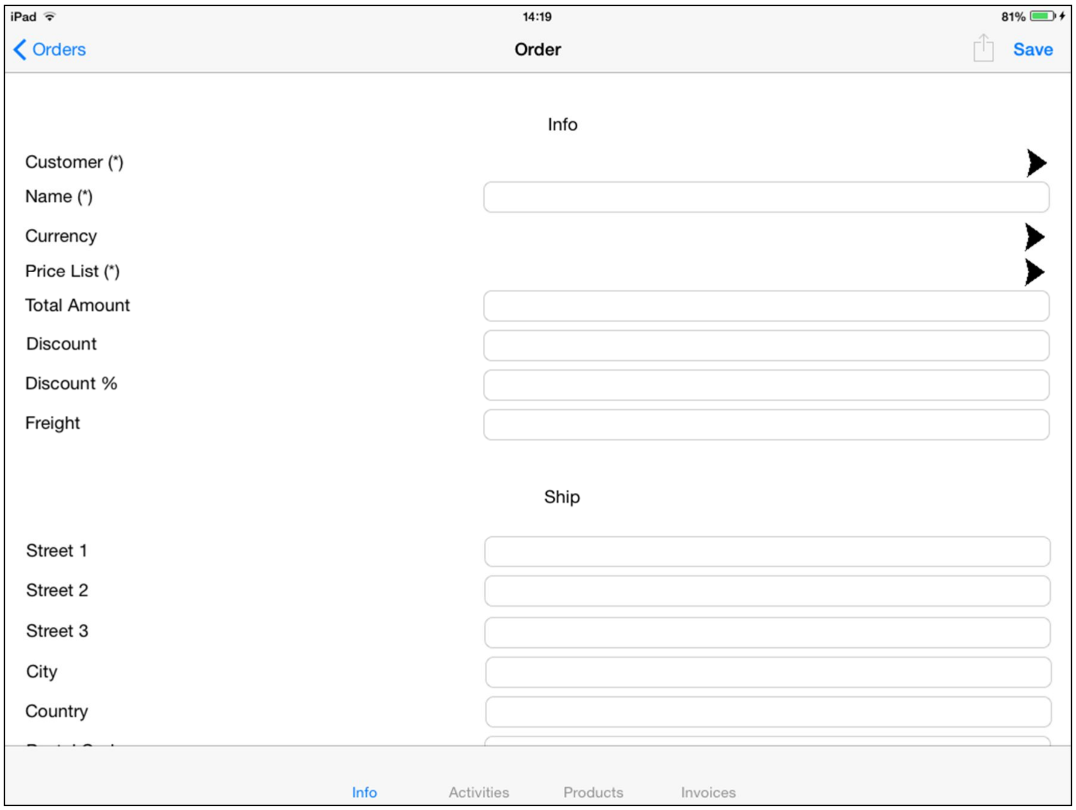


To save the modified data and update the CRM order, tap on the "Save" button in the title frame. The order is immediately modified and stored in the local database. The CRM order is updated via an update query (when online mode is selected) or an update query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

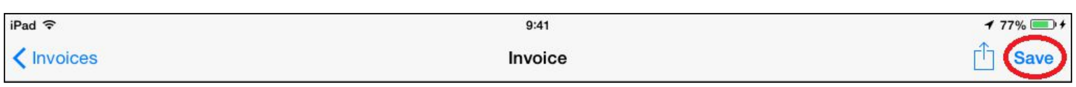


11.11.2 Create new order

To create new order, tap on the plus icon and order detail page with new blank record will be displayed. The user can edit the record as required.



To save the newly created order, tap on the "Save" button in the title frame. The order is immediately created and stored in the local database. The CRM order is created via an insert query (when online mode is selected) or an insert query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

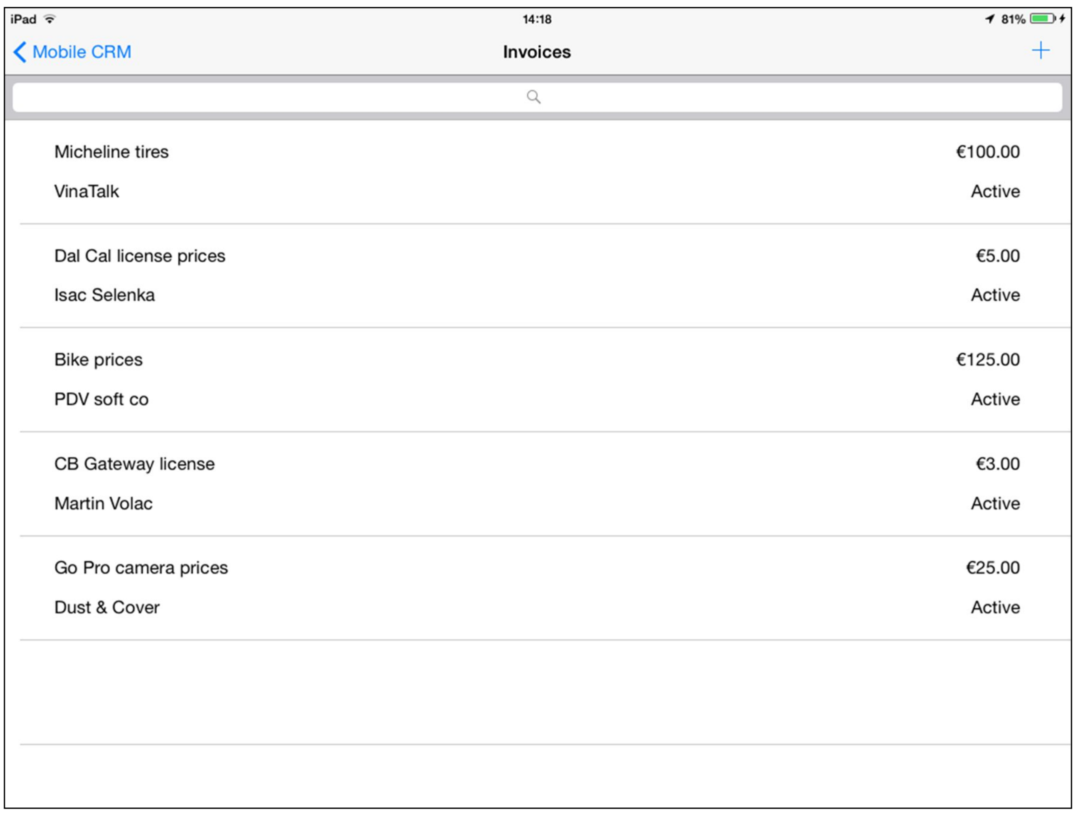


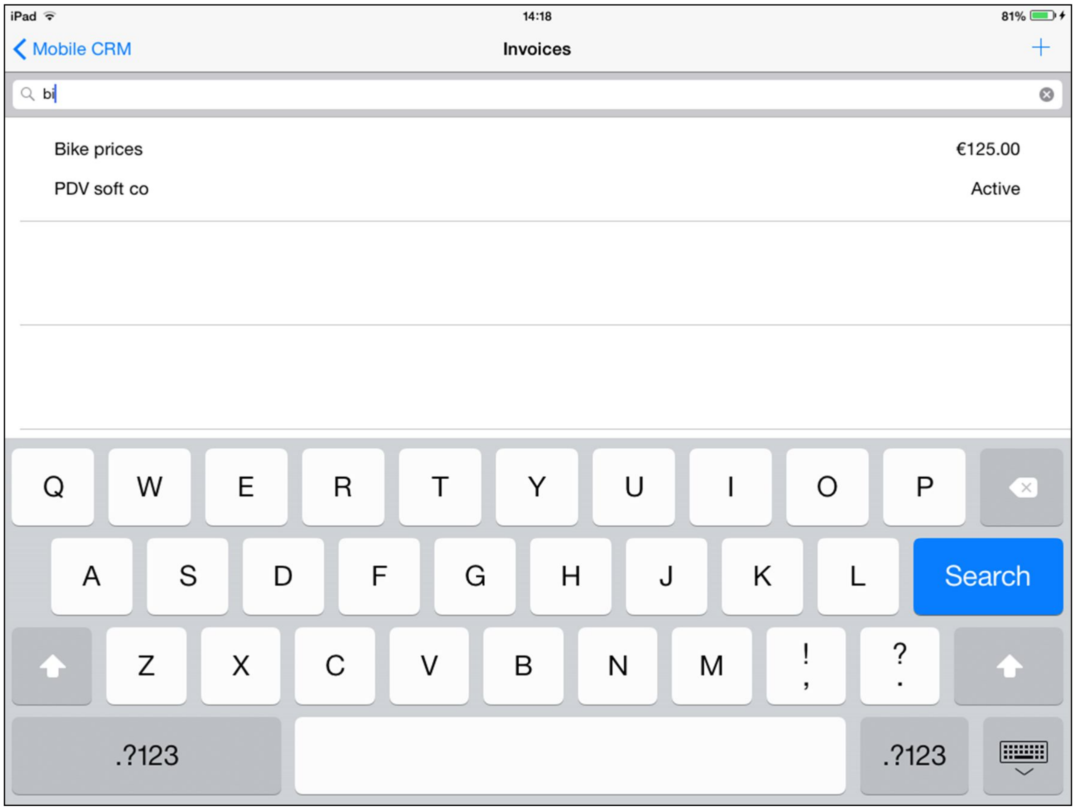
11.12 Invoices page

Invoices page contains information about the available CRM invoices. To display details about a specific invoice, select the invoice from the list by tapping on the item.

The user can use filter to look for a specific invoice typing a search string into the search box.

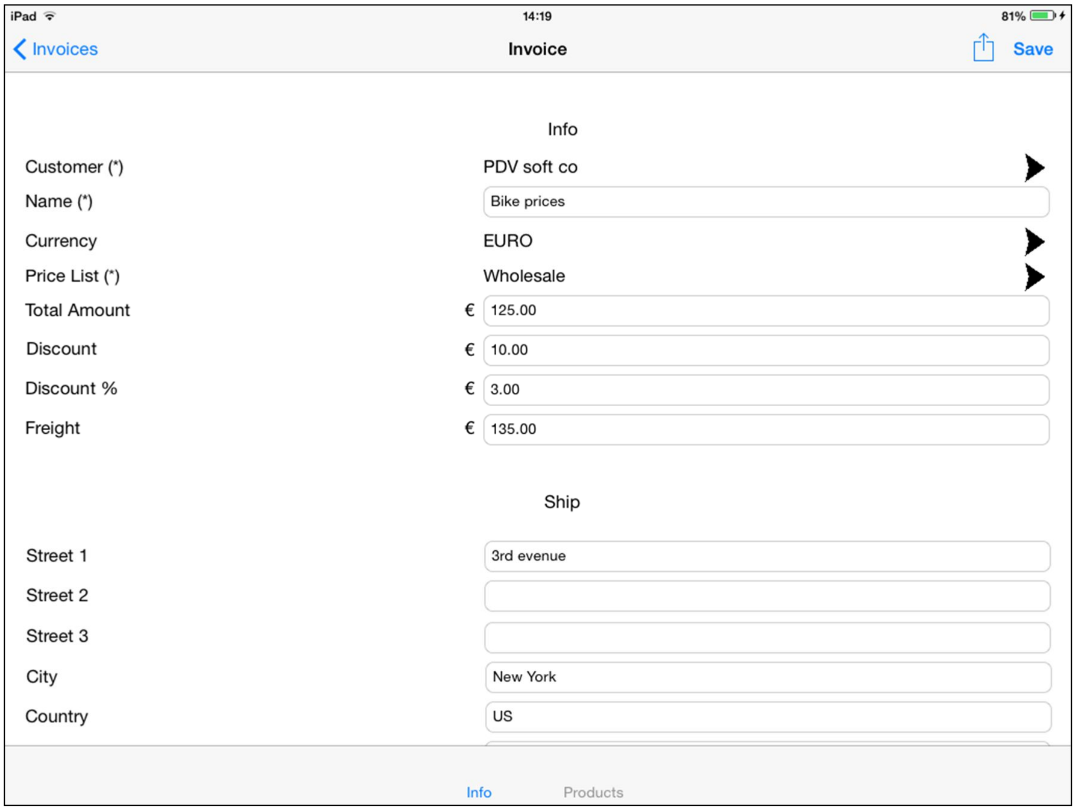
The user can sort the list of invoices according to personal preference. To sort the list choose the preferred sort type and the list will be sorted.



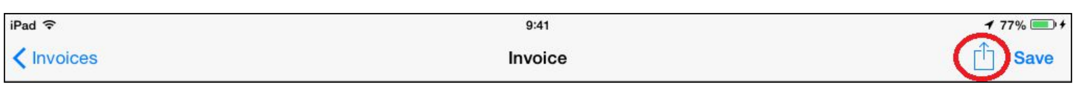

iPad
14:18
81%
Mobile CRM
Invoices
bi
Bike prices
€125.00
PDV soft co
Active
Search

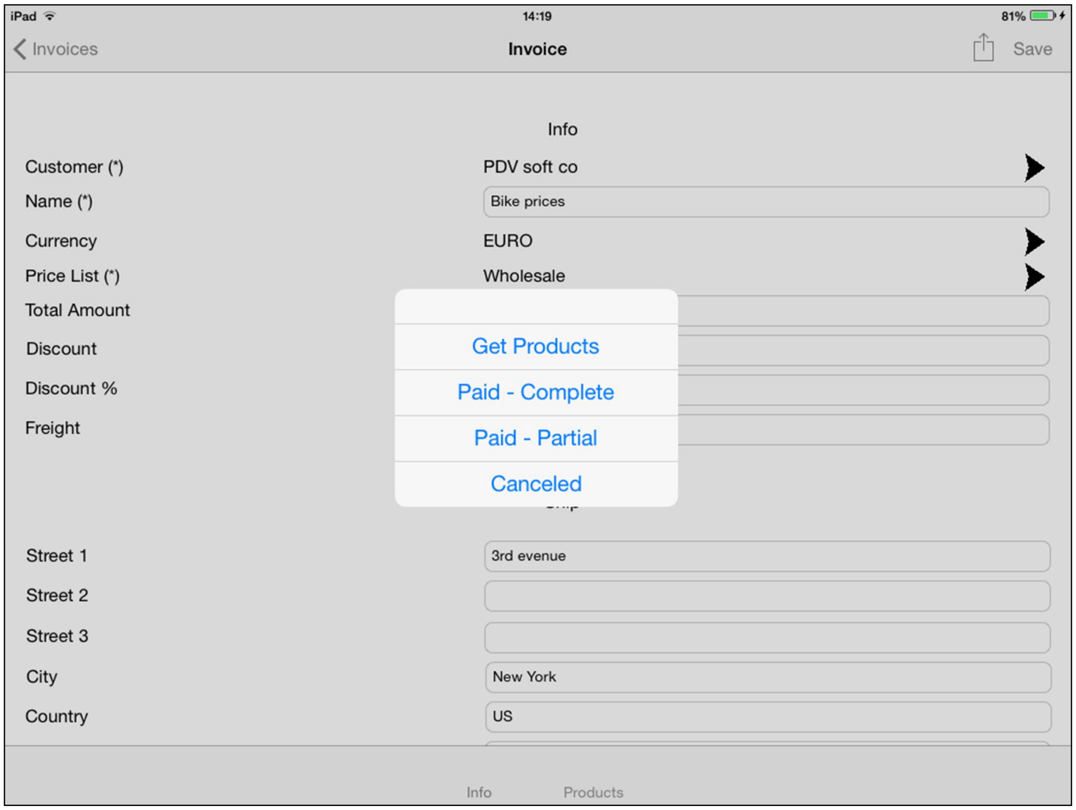
11.12.1 Invoice detail page

The invoice detail page displays detailed information about the selected invoice. The user is able to edit the record as required by changing the content of the fields.

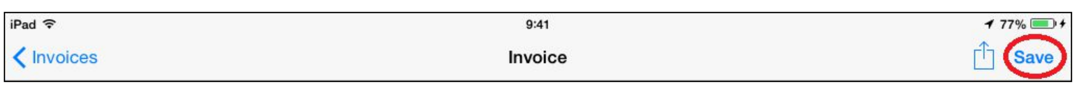


To display the list of additional actions, tap on the additional actions icon. A context menu appears and the user can choose the action to execute.



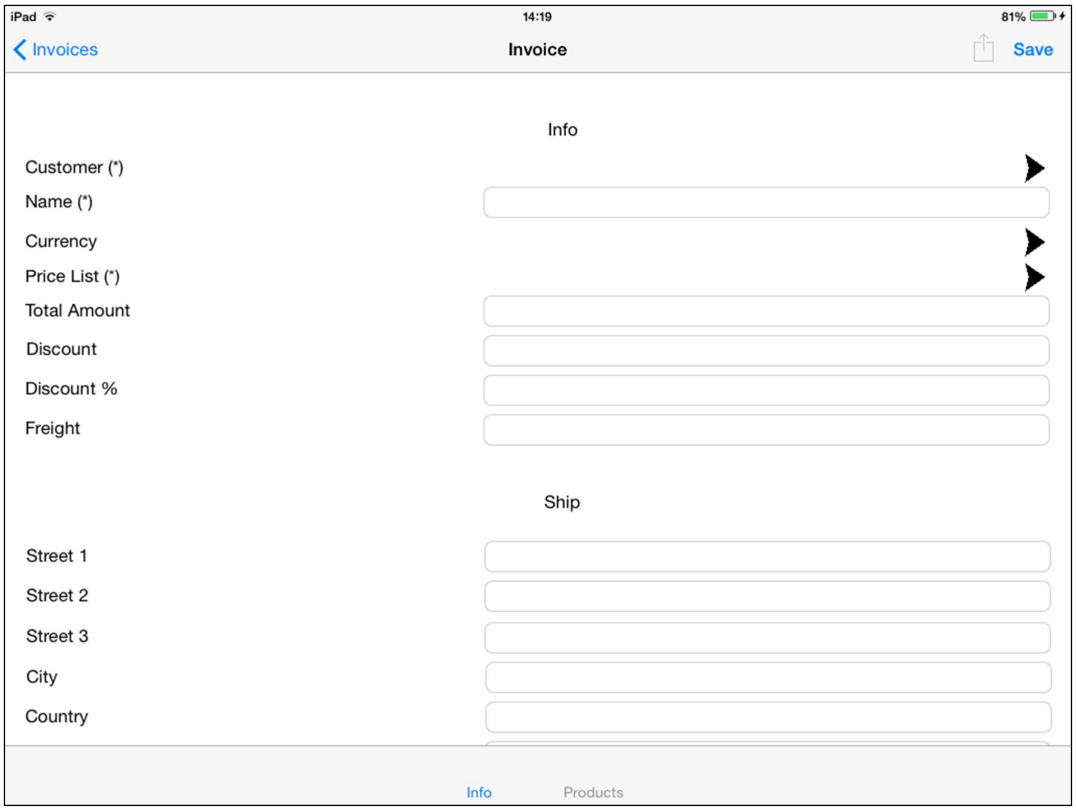


To save the modified data and update the CRM invoice, tap on “Save” button in the title frame. The invoice is immediately modified and stored in the local database. The CRM invoice is updated via an update query (when online mode is selected) or an update query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

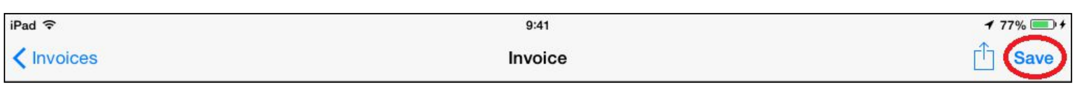


11.12.2 Create new invoice

To create new invoice, tap on the plus icon and invoice detail page with new blank record will be displayed. The user can edit the record as required.



To save the newly created invoice, tap on the "Save" button in the title frame. The invoice is immediately created and stored in the local database. The CRM invoice is created via an insert query (when online mode is selected) or an insert query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

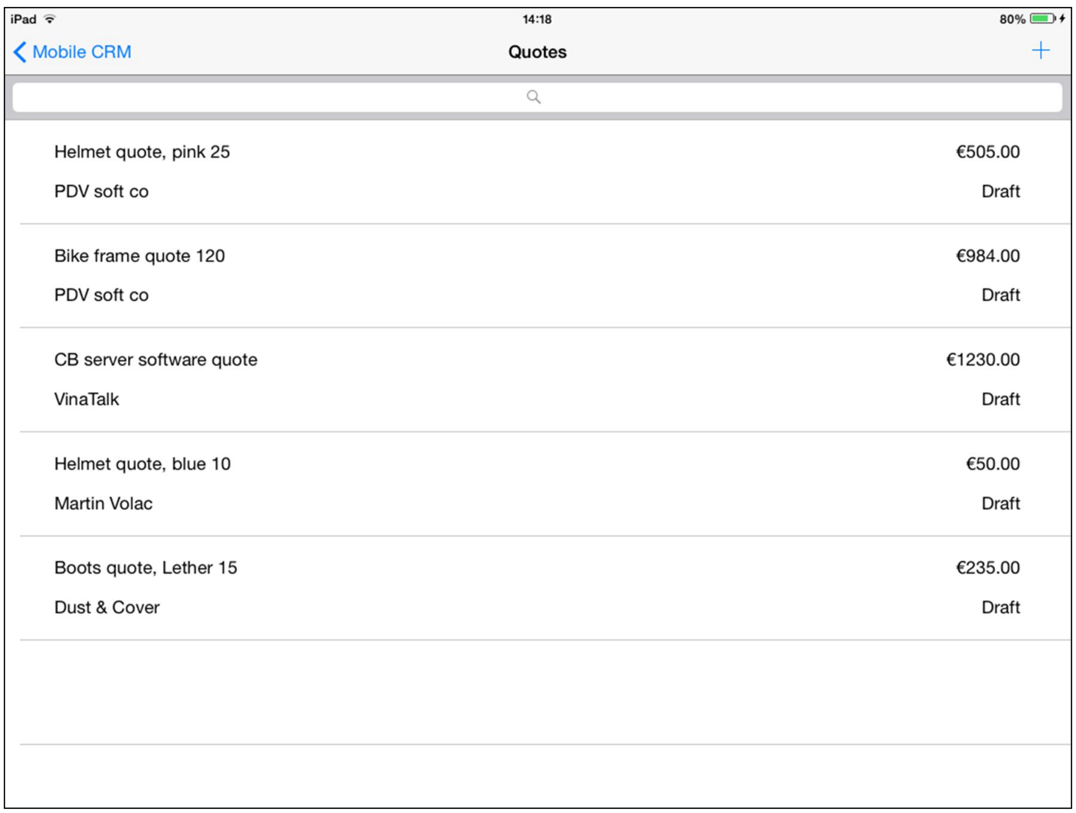


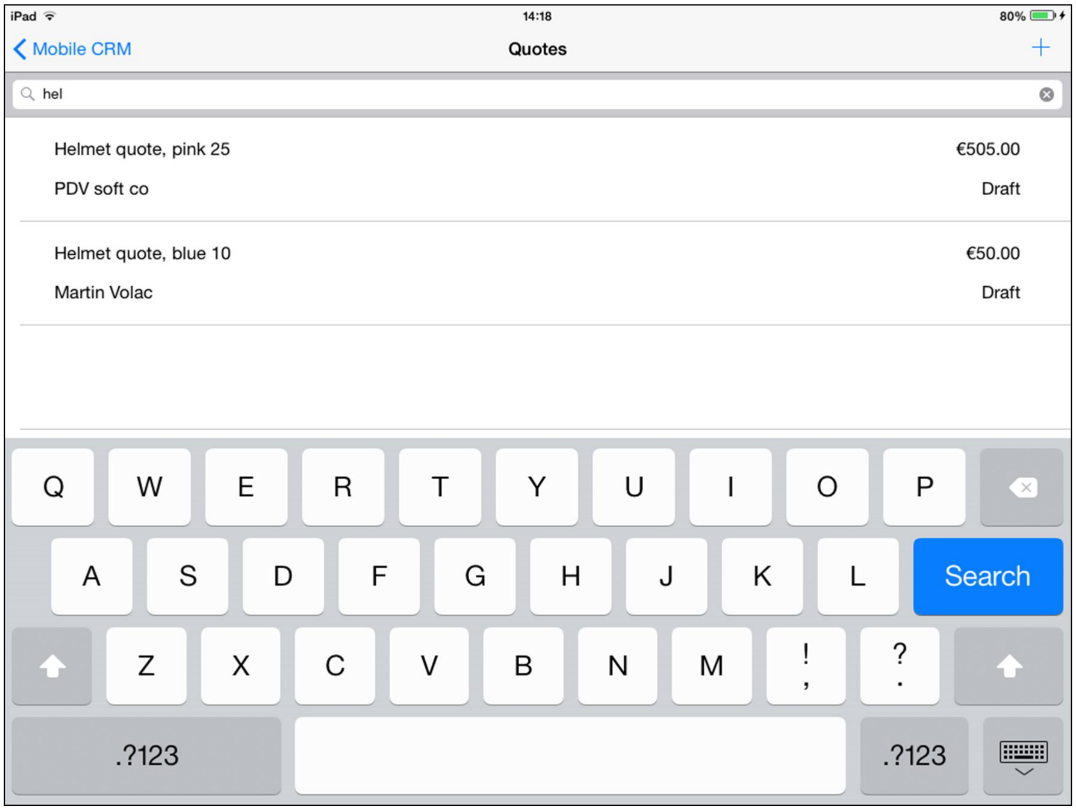
11.13 Quotes page

Quotes page contains information about the available CRM quotes. To display details about a specific quote, select the quote from the list by tapping on the item.

The user can use filter to look for a specific quote by typing a search string into the search box.

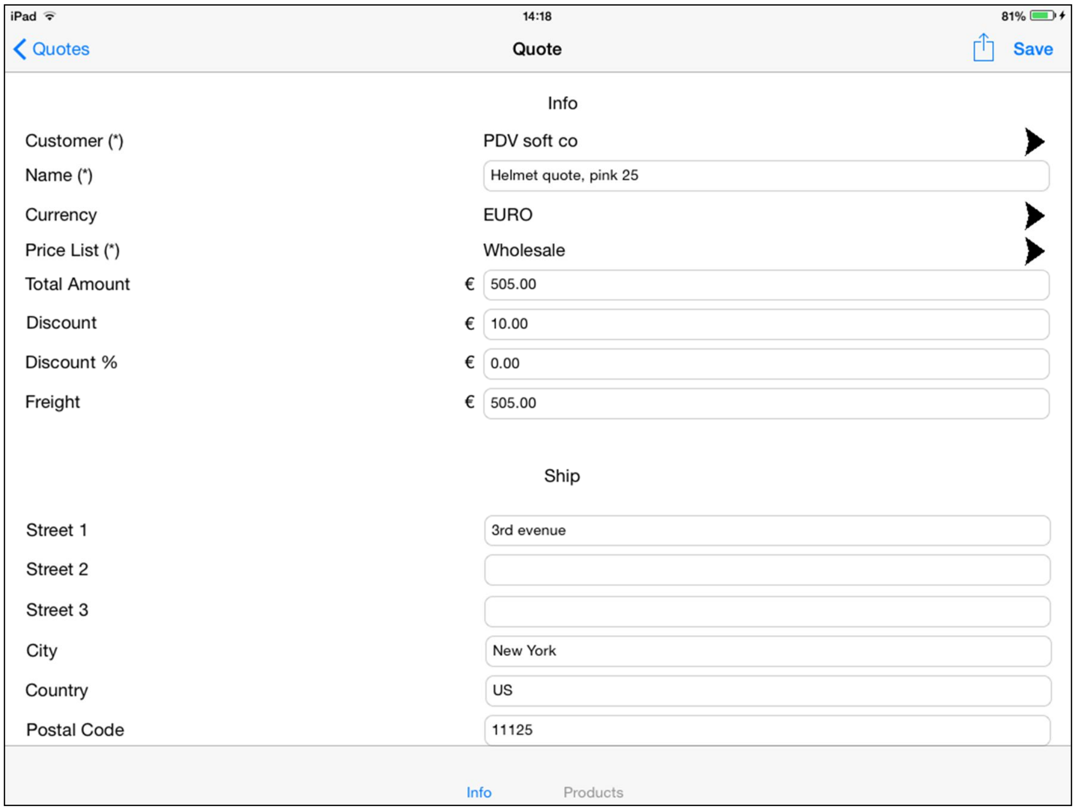
The user can sort the list of quotes according to personal preference. To sort the list choose the preferred sort type and the list will be sorted.



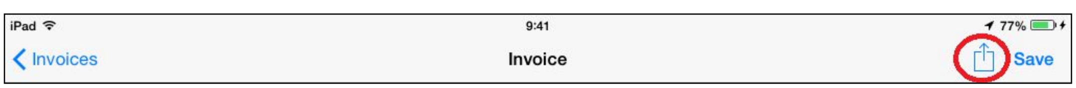

iPad
14:18
80%
Mobile CRM
Quotes
hel
Helmet quote, pink 25
€505.00
PDV soft co
Draft
Helmet quote, blue 10
€50.00
Martin Volac
Draft
Search
.?123

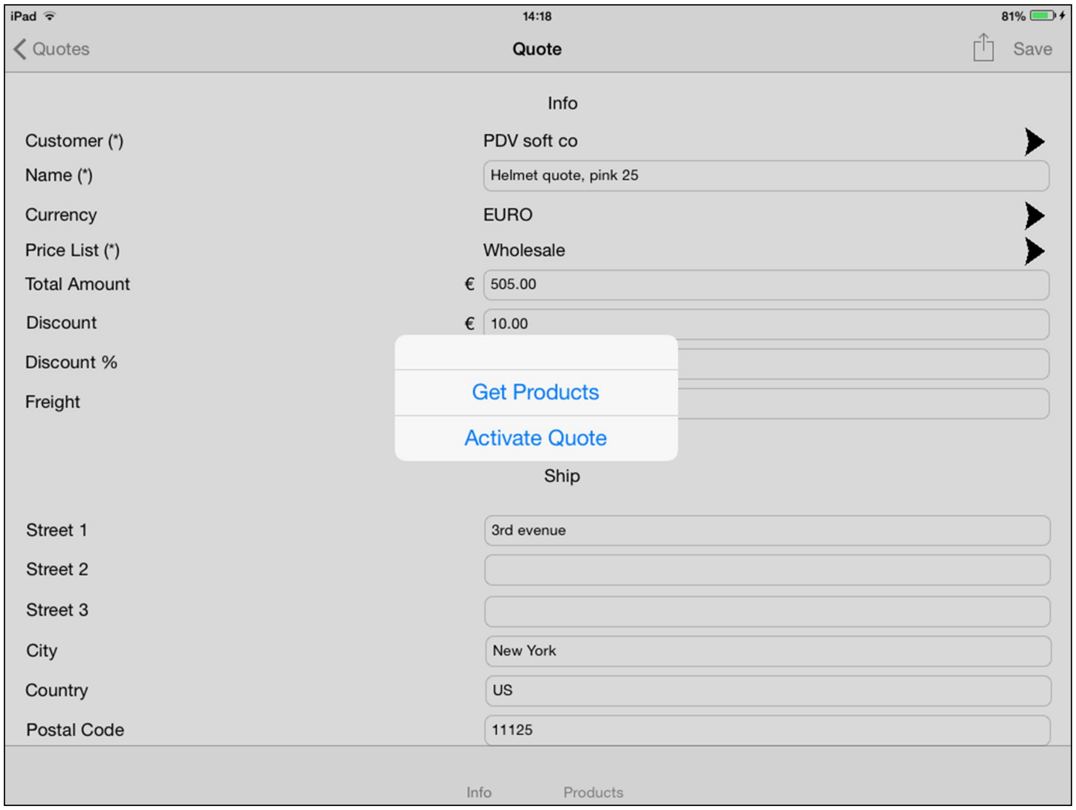
11.13.1 Quote detail page

The quote detail page displays detailed information about the selected quote. The user can edit the record by modifying content of the fields as required.

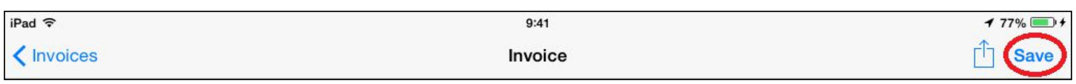


To display the list of additional actions, tap on the additional actions icon. A context menu appears and the user can choose the action to execute.



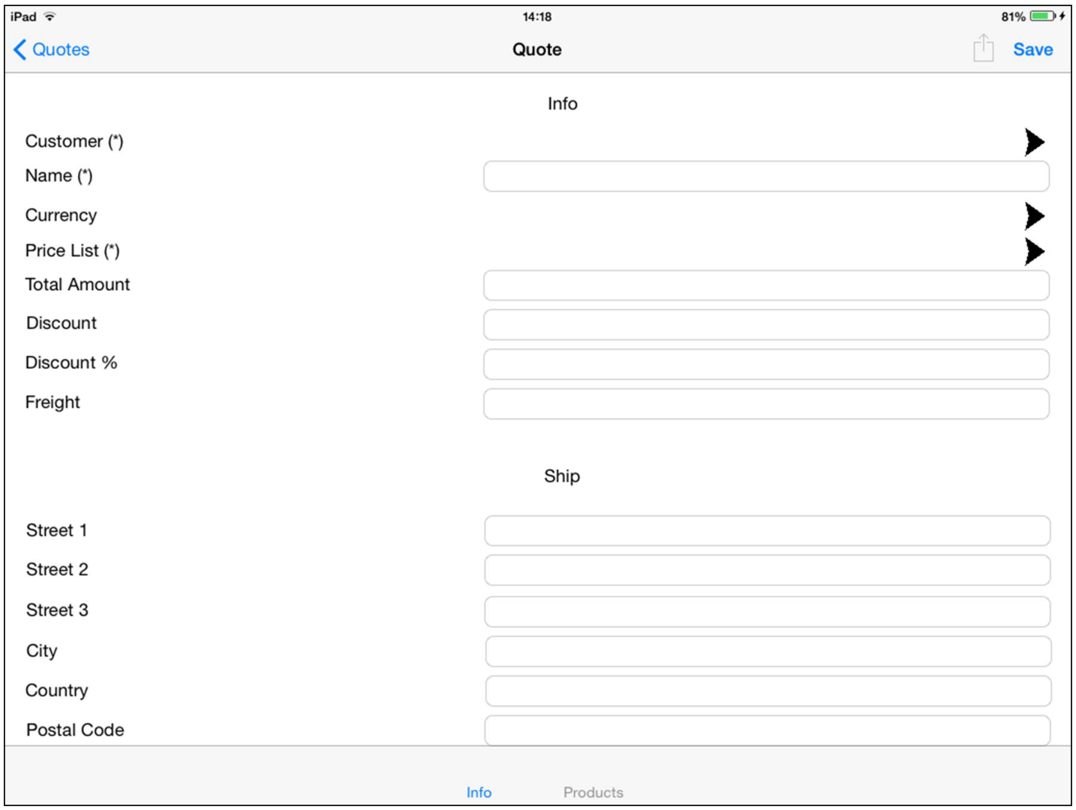


To save the modified data and update the CRM quote, tap on the "Save" button in the title frame. The quote is immediately modified and stored in the local database. The CRM quote is updated via an update query (when online mode is selected) or an update query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

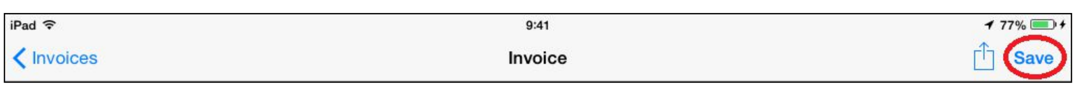


11.13.2 Create new quote

To create new quote, tap on the plus icon and order detail page with new blank record will be displayed. The user can edit the record as required.



To save the newly created quote, tap on the "Save" button in the title frame. The quote is immediately created and stored in the local database. The CRM quote is created via an insert query (when online mode is selected) or an insert query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

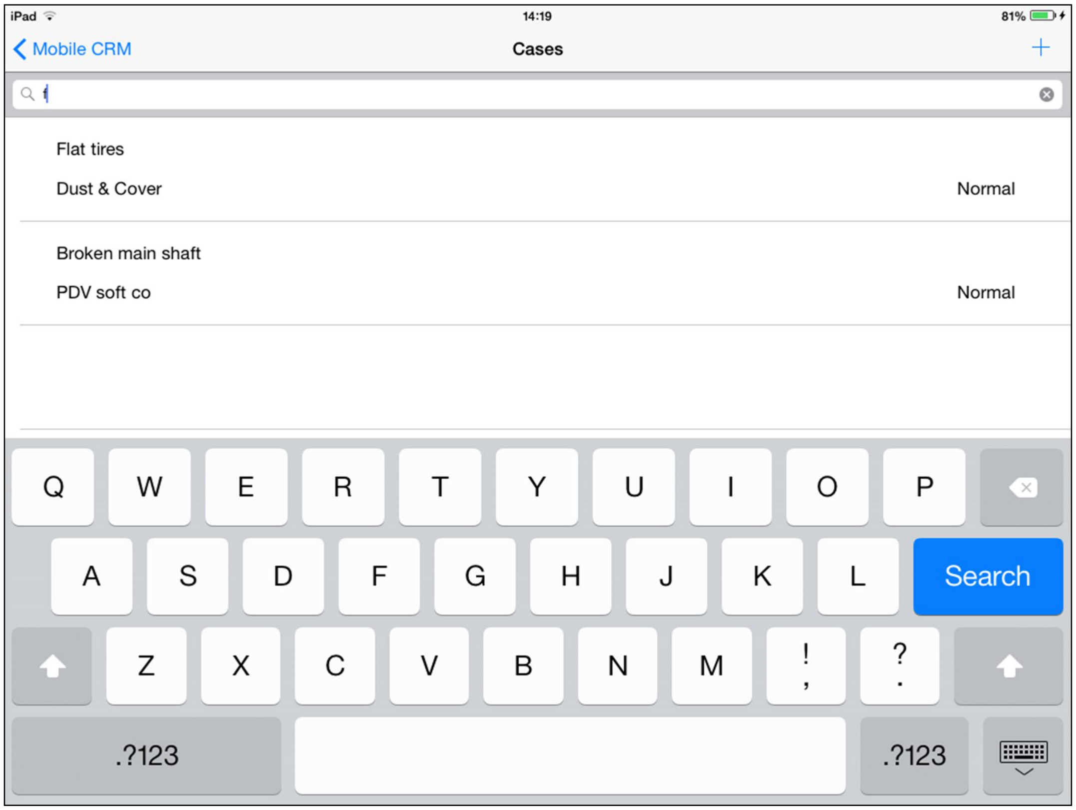


11.14 Cases page

Cases page contains information about the available CRM cases (incidents). To display details about a specific case, select the case from the list by tapping on the item.

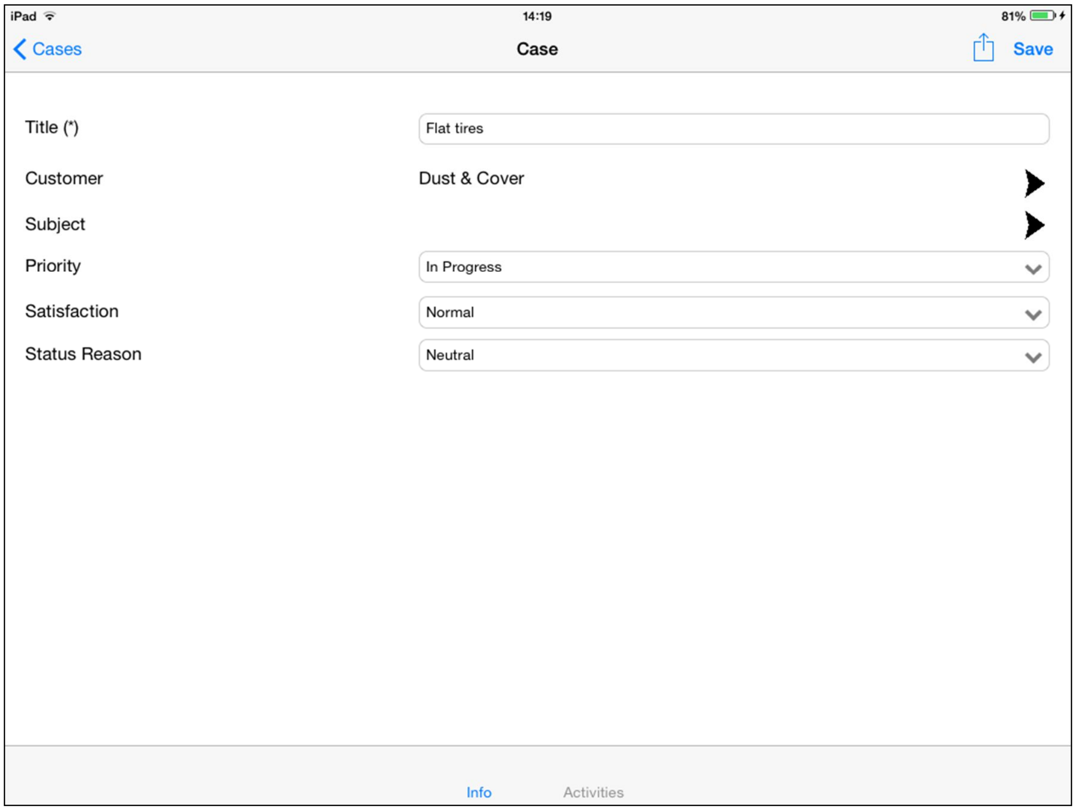
The user can use filter to look for a specific case by typing a search string into the search box.

The user can sort the list of cases according to personal preference. To sort the list choose the preferred sort type and the list will be sorted.

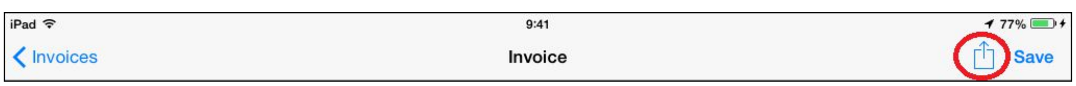

iPad
14:19
81%
Mobile CRM
Cases
Flat tires
Dust & Cover
Normal
Broken main shaft
PDV soft co
Normal
Q W E R T Y U I O P
A S D F G H J K L
Search
Z X C V B N M ! , ? .
.?123
.?123

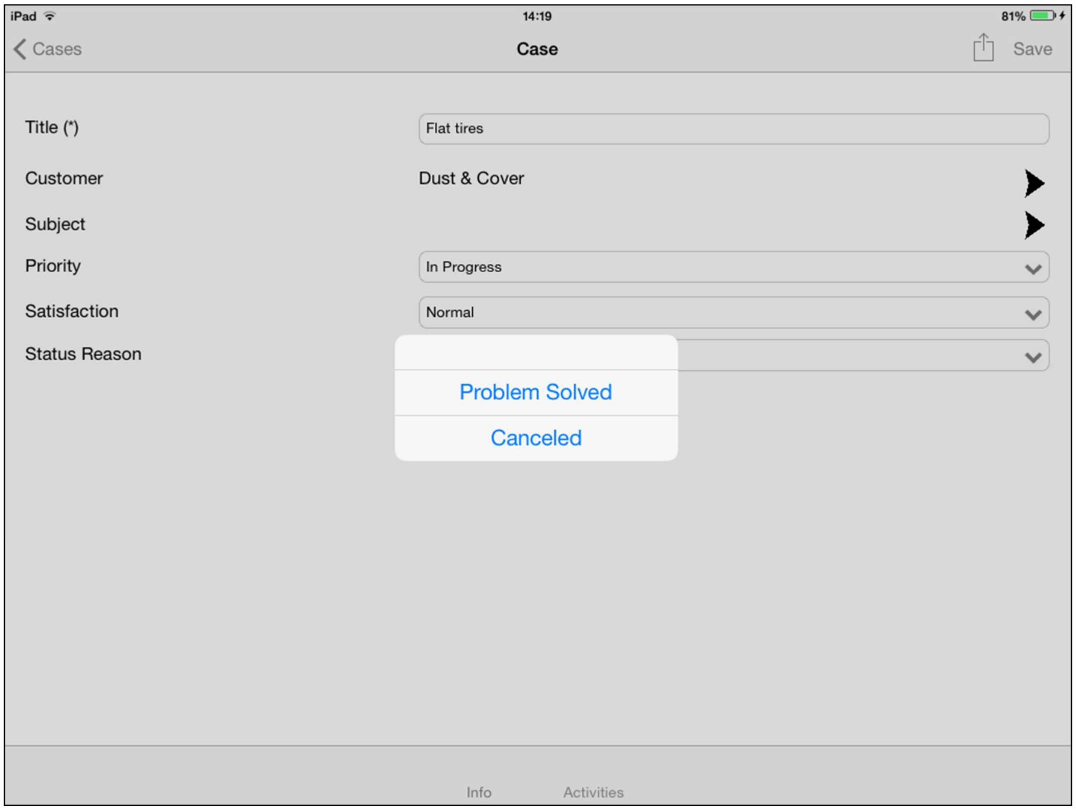
11.14.1 Case detail page

The case detail page displays detailed information about the selected case. The user can modify the record by changing the content of the fields as required.

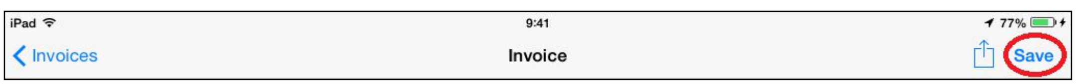


To display the list of additional action, tap on the additional actions icon. A context menu appears and the user can choose the action to execute.



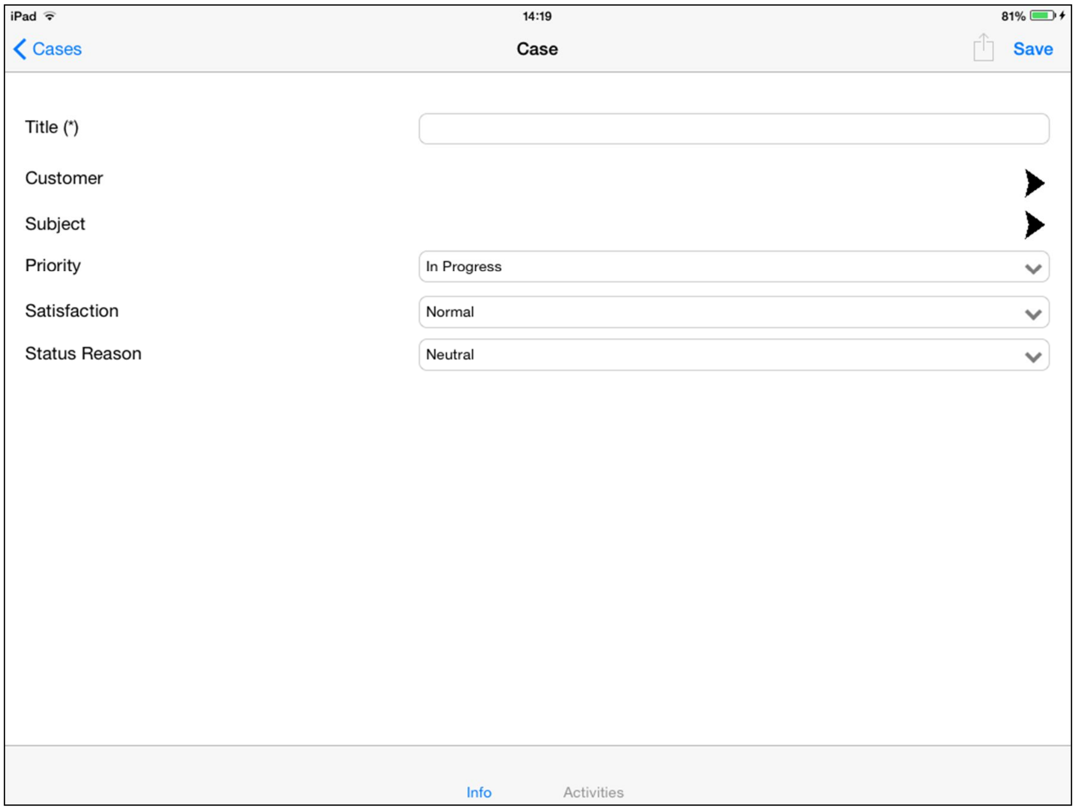


To save the modified data and update the CRM case, tap on the “Save” button in the title frame. The case is immediately modified and stored in the local database. The CRM case is updated via an update query (when online mode is selected) or an update query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

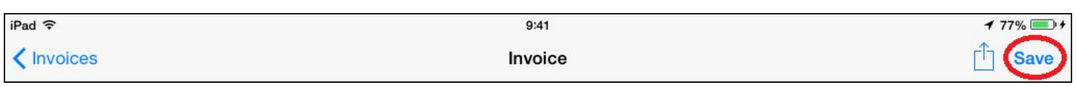


11.14.2 Create new case

To create new case, tap on the plus icon and case detail page with new blank record will be displayed. The user can edit the record as required.



To save the newly created case, tap on the "Save" button in the title frame. The case is immediately created and stored in the local database. The CRM case is created via an insert query (when online mode is selected) or an insert query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.



11.15 Notes (add notes, read notes)

The user is able to view and add notes to the entities to provide additional description. To show a list of user created notes about a specific entity navigate to the entity by selecting the specific entity from the list. Open the details about the entity and select the notes tab. When any notes about the specific entity exist a list of all notes is displayed.

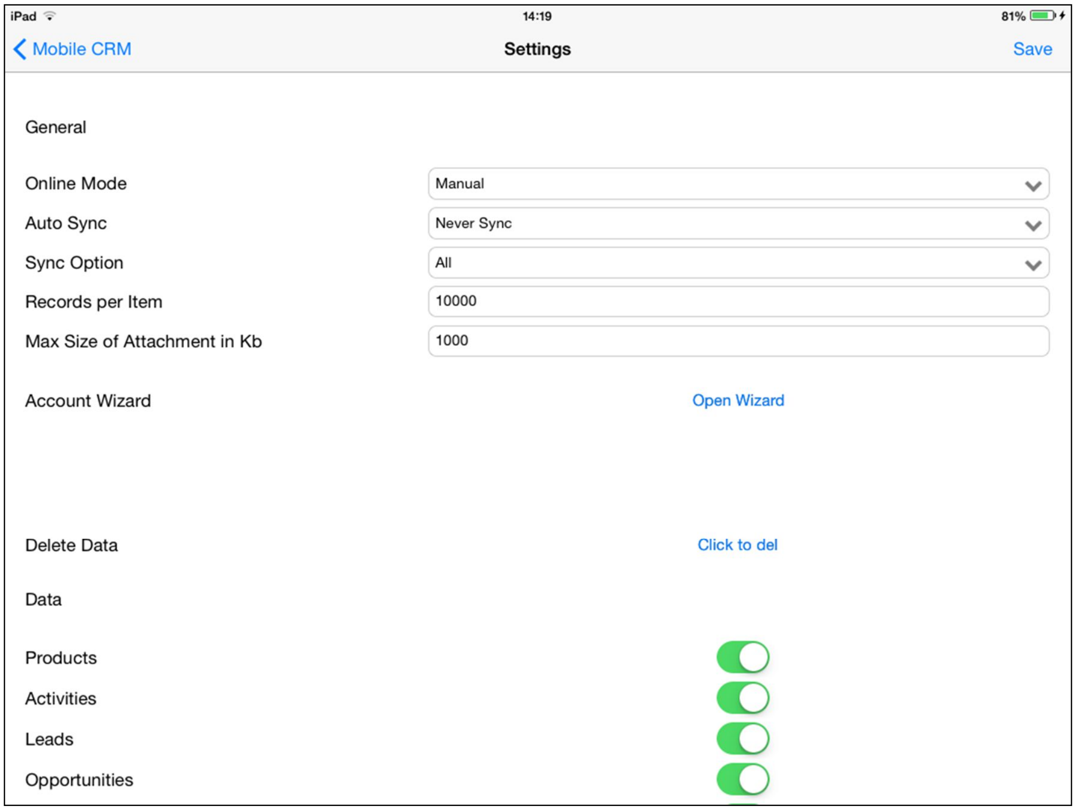
To add a new note to a specific entity, tap on the plus icon in the title frame of the entity. A popup page is displayed and the user can type in the note regarding the current entity. When finished typing tap on "OK" button. The note is immediately added to the entity and stored in the local database. The CRM note is added via an insert query (when online mode is selected) or an insert query is stored in the local database and prepared to be executed during the synchronization (when offline mode is selected) depending on the users predefined settings.

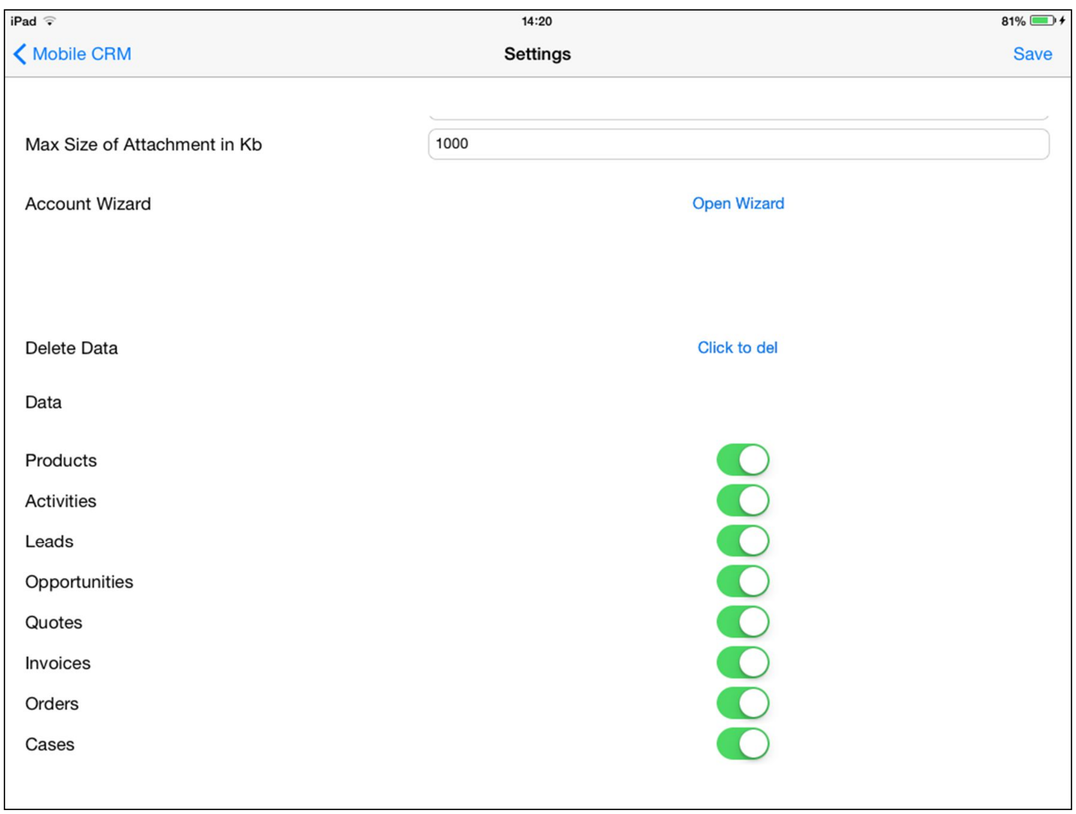
11.16 Settings page

To change the application settings and customize the displayed entities, tap on the settings page in the main menu. When tapped, the settings page is opened and user is able to modify the application settings.

Currently the Mobile CRM application settings page has two parts where the user can modify the application settings:

- General settings
- Data settings


iPad
14:19
81%
Mobile CRM
Settings
Save
General
Online Mode
Manual
Auto Sync
Never Sync
Sync Option
All
Records per Item
10000
Max Size of Attachment in Kb
1000
Account Wizard
Open Wizard
Delete Data
Click to del
Data
Products
Activities
Leads
Opportunities


iPad
14:20
81%
Mobile CRM
Settings
Save
Max Size of Attachment in Kb
1000
Account Wizard
Open Wizard
Delete Data
Click to del
Data
Products
Activities
Leads
Opportunities
Quotes
Invoices
Orders
Cases

11.16.1 General settings description

The first pivot page on the settings page is "General settings" where all settings regarding the application can be modified.

11.16.1.a Online Mode

The user can choose when the application is allowed to connect to the internet

- Always - the application is allowed to connect to the internet always - when wifi or 3G connection is available
- Wifi only - the application is allowed to connect to the internet only when wifi connection is available
- Manual - the application is allowed to connect to the internet only when the user taps on the synchronization icon in the main menu title frame and wifi or 3G connection is available
- Never - the application is not allowed to connect to the internet - any attempt to start synchronization process manually will display error message informing the user about the online mode restriction

11.16.1.b Auto Sync

The user can choose when to process the synchronization or submit queries directly to the CRM server

- On start / change - the synchronization and submitted queries are executed when the application starts or any entity is successfully modified by the user (modified and saved)
- On start - the synchronization is executed only when the application starts
- On change - the synchronization and submitted queries are executed when any entity is successfully modified by the user (modified and saved)

11.16.1.c Sync Option

User is able to choose what kind of data to download during synchronization process

- My data - download and synchronize only data owned by the user
- All - download and synchronize all data - can cause slow and long synchronization process times because of the huge amount of data, this is not recommended

11.16.1.d Records per item

Option to restrict the number of items to download for each entity (for example only 100 items of each type)

11.16.1.e Max. size of attachment in Kb

Option to restrict the size of attachment that is downloaded to the device.

11.16.1.f Account wizard

Option to manage user account. Description of the functionality is described in separate chapter later in this document.

11.16.1.g Theme

Option to choose a user preferred theme. Mobile CRM supports both dark and light theme. The user has to restart the application in order to apply the new theme.

- Dark - displays the dark theme. This theme is set as default as dark background saves the devices energy and allows the user to use the application for extended period of time
- Light - displays the light theme. Light theme causes higher energy consumption on the device.

11.16.1.h Map and Location Services

Option used to enable or disable the map functionality as well as Localization service. When turned off, the Map page will not be displayed in the main menu.

11.16.1.i Background Agent

Option to enable or disable background agent used to periodically update the tile and show Toast message with information about number of appointments that are scheduled to start within 30 minutes from the time the toast message was displayed.

11.16.1.j Delete Data

Option "Delete Data" button is used to clear all data from the local database only. This functionality is available to remove demo data from the local database before the user starts the synchronization process.

11.16.2 Data settings description

The second part of settings page is "Data settings" page where the user can choose what kind of data entities to display in the apps main menu.

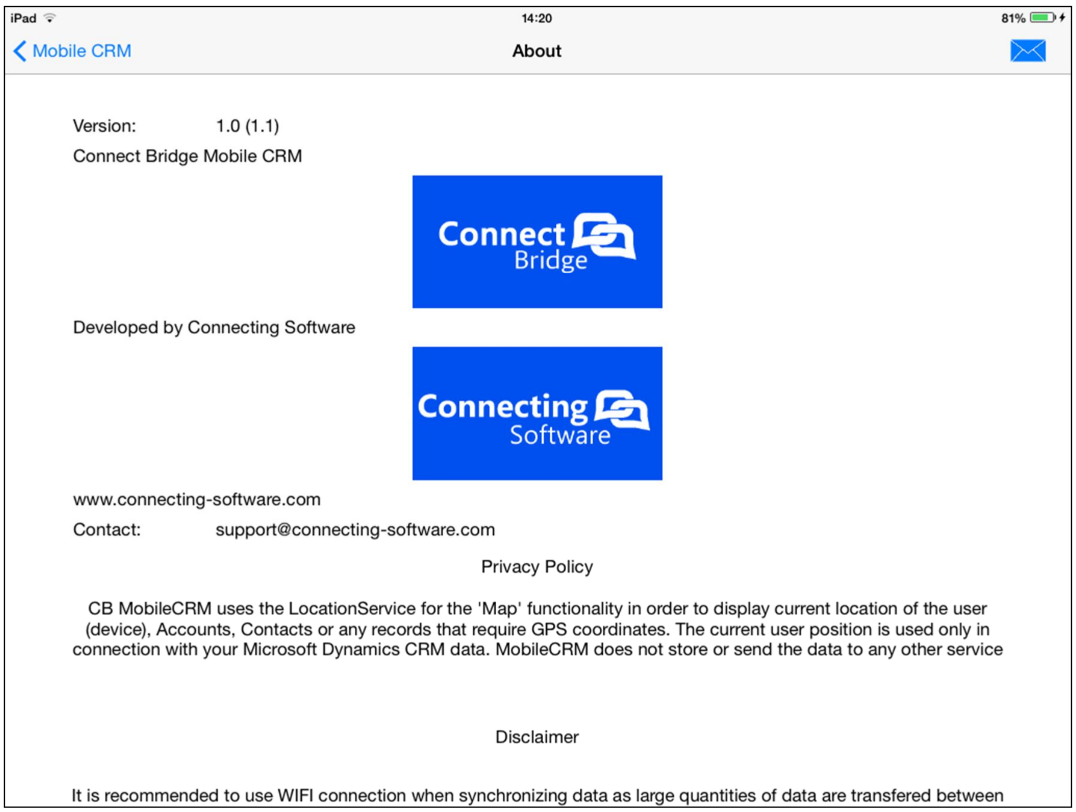
List of available data settings:

- Products - user is able to hide or display the Product entity from the main menu.
- Activities - user is able to hide or display the Activities entity from the main menu.
- Opportunities - user is able to hide or display the Opportunities entity from the main menu.
- Invoices - user is able to hide or display the Invoices entity from the main menu.
- Quotes - user is able to hide or display the Quotes entity from the main menu.
- Orders - user is able to hide or display the Orders entity from the main menu.
- Cases - user is able to hide or display the Cases (Incident) entity from the main menu.
- Leads - user is able to hide or display the Leads entity from the main menu.

11.17 About page

The about page contains information about the application. The information contain the current application version, contact email, and company logos.

The user can contact the support from the about page by tapping the envelope in the title frame. When the envelope button is tapped the user has to choose what email account to use in order to send the email. When appropriate email account is selected, email editor page is opened and the user can type the content of the email to be sent to the support.

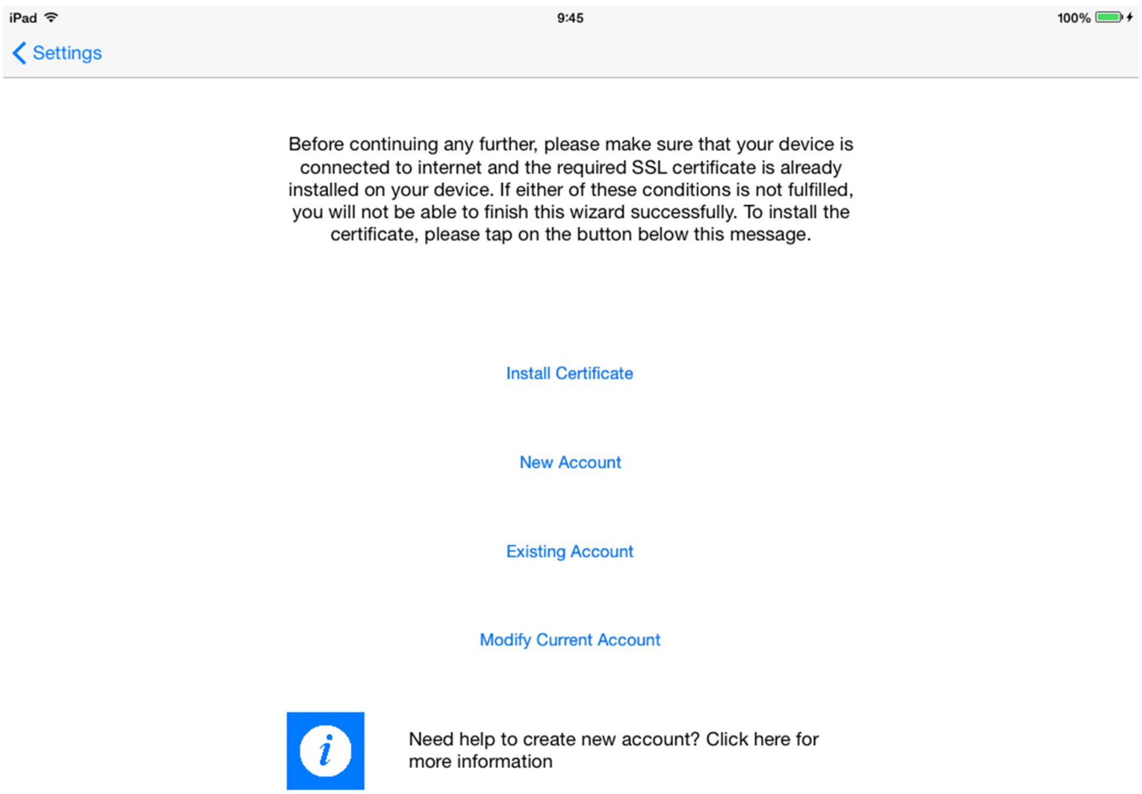


11.18 Account wizard page

The account wizard page is used to manage user account used for communication with Connect Bridge server and the users Dynamics CRM server. This process requires active connection to the internet.

To get step by step guide for creating new account, tap on the info icon or the text containing the help description.

The page allows following operations:



11.18.1 Create new account

To create a new user account, tap on the "Create new account" button. Fill in the required fields and tap on "Next" button.

- **Email field** - email address of the user that will be used to contact and identify the true identity of the user in case it will be necessary. (Lock the account to prevent any harm when user has lost the device, ...)
- **Crm Login** - Login name used to log into the users Dynamics CRM server. We suggest the user to type in also the domain. The login name has to be type in the same way as the CRM server requires.

NOTE:

If the domain name is also required to login to your CRM server add the domain name together with login name

EXAMPLE:

user@domain

domain\user

etc.

- **Crm Password** - Password used to login to the users CRM server
- **Re. Password** - field for retyping the Crm password to make sure that the password is correct
- **Crm ServerUrl** - Url link to the CRM server's web service used to connect and communicate with the users CRM server

NOTE:

1. Be aware that the field is case sensitive!

2. The format how to type the url : If the CRM server runs more than one organization, user has to specify the organization which to connect to. In this case the format is as follows

http(s)://<host>:<port>/<company>

or

http(s)://<host>/<company>

when the server does not use custom port.

If the CRM server runs only one organization, the user can simply type url with following format

http(s)://<host>:<port>

or

http(s)://<host>

when the server does not use custom port.

The application will modify the link internally and add the common end tail "**/XrmServices/2011/Organization.svc**"

Example: https://crm.cn-s.eu:1234/CrossNationalSolutions

https://crm.cn-s.eu

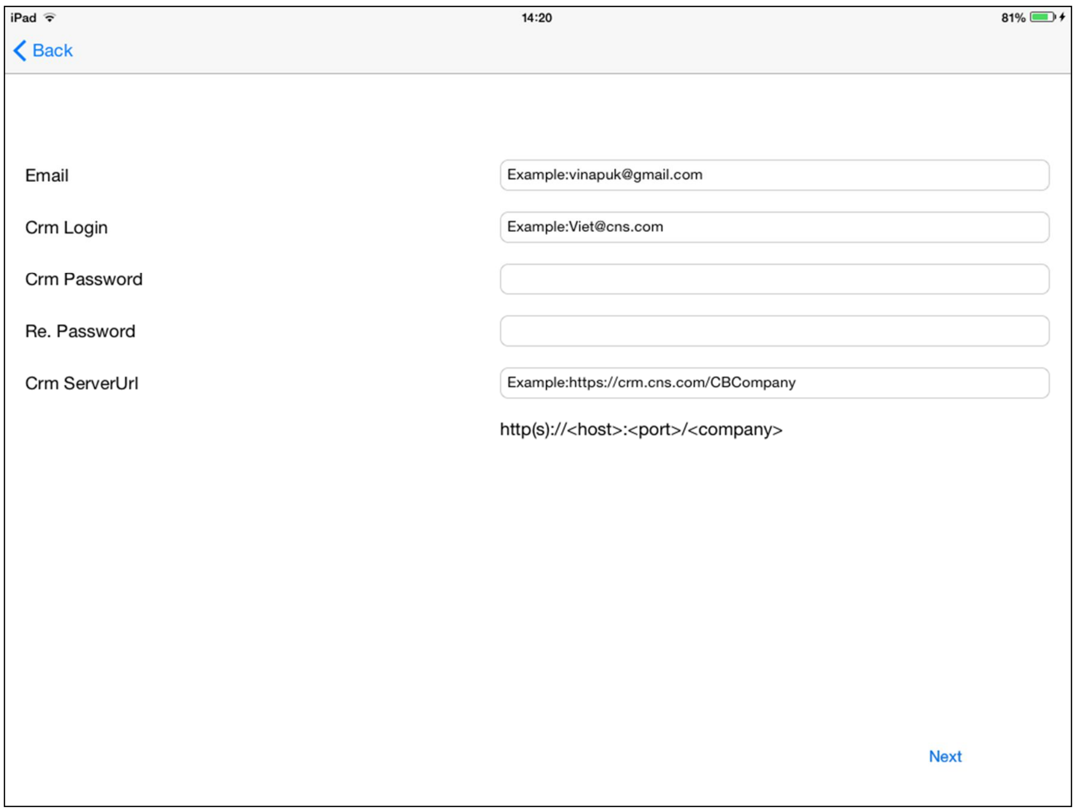
NOTE:

Make sure that the CRM web service can be accessed by typing the whole url into the browser and checking that you get the correct response from your CRM server service !

Example:

https://crm.cn-s.eu:1234/CrossNationalSolutions/XrmServices/2011/Organization.svc

https://crm.cn-s.eu/XrmServices/2011/Organization.svc

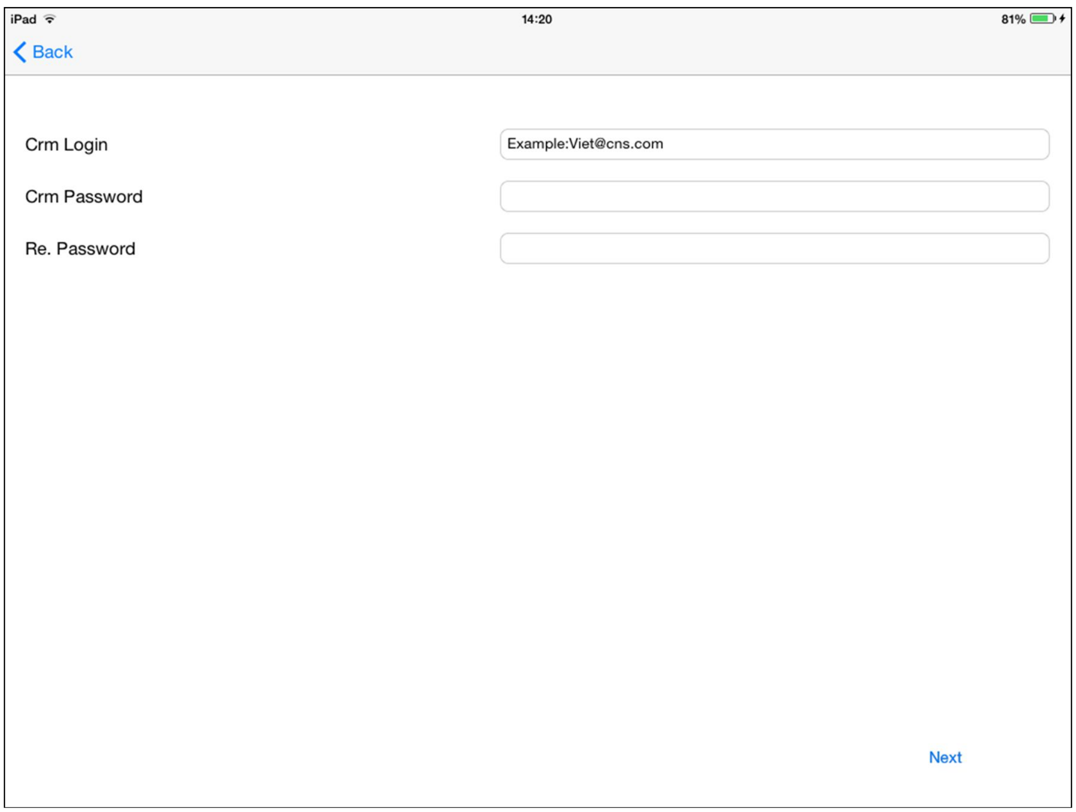


When any error occurs during creating the users account, user is notified by a warning message.

11.18.2 Existing account

To use an already existing CRM account associated with the existing CB account, the user can use the "Existing account" button. When tapped, the user is requested to fill in missing details that will be used to identify and verify the account.

- **CRM Login** - the login of the user for users CRM server
- **CRM Password** - the password used to log into the users CRM server
- **Re. Password** - field for retyping the password to make sure that the password is correct



When all fields are filled, tap on the "Next" button to verify the account and user credentials of the user. When successfully verified, the user account is set as default account (currently used account). When any error occurs during the account verification, the user is notified by error message.

11.18.3 Modify Current Account

To modify the current account, tap on the "Modify Current Account" button. The details about the default (currently used) CRM account are loaded into the fields to display the currently stored values. Only "Password" and "Re. Password" fields are not loaded for obvious reasons. The user is requested to retype the password to make sure no unauthorized user is trying to modify the current CRM account.

- **CRM Account Name** - This field cannot be modified. The field identifies the current CRM account that is being modified

- **Crm Login** - Login name used to log into the users Dynamics CRM server

  NOTE:

  If the domain name is also required to login to your CRM server add the domain name together with login name

  EXAMPLE:

  user@domain

  domain\user

  etc.

- **Crm Password** - Password used to login to the users CRM server
- **Re. Password** - field for retyping the Crm password to make sure that the password is correct
- **Crm ServerUrl** - Url link to the CRM server's web service used to connect and communicate with the users CRM server

  NOTE:

  1. Be aware that the field is case sensitive!

  2. The format how to type the url : If the CRM server runs more than one organization, user has to specify the organization which to connect to. In this case the format is as follows

  http(s)://<host>:<port>/<company>

  or

  http(s)://<host>/<company>

  when the server does not use custom port.

  If the CRM server runs only one organization, the user can simply type url with following format

  http(s)://<host>:<port>

or

http(s)://<host>

when the server does not use custom port.

The application will modify the link internally and add the common end tail "**/XrmServices/2011/Organization.svc**"

Example: https://crm.cn-s.eu:1234/CrossNationalSolutions

https://crm.cn-s.eu

NOTE:

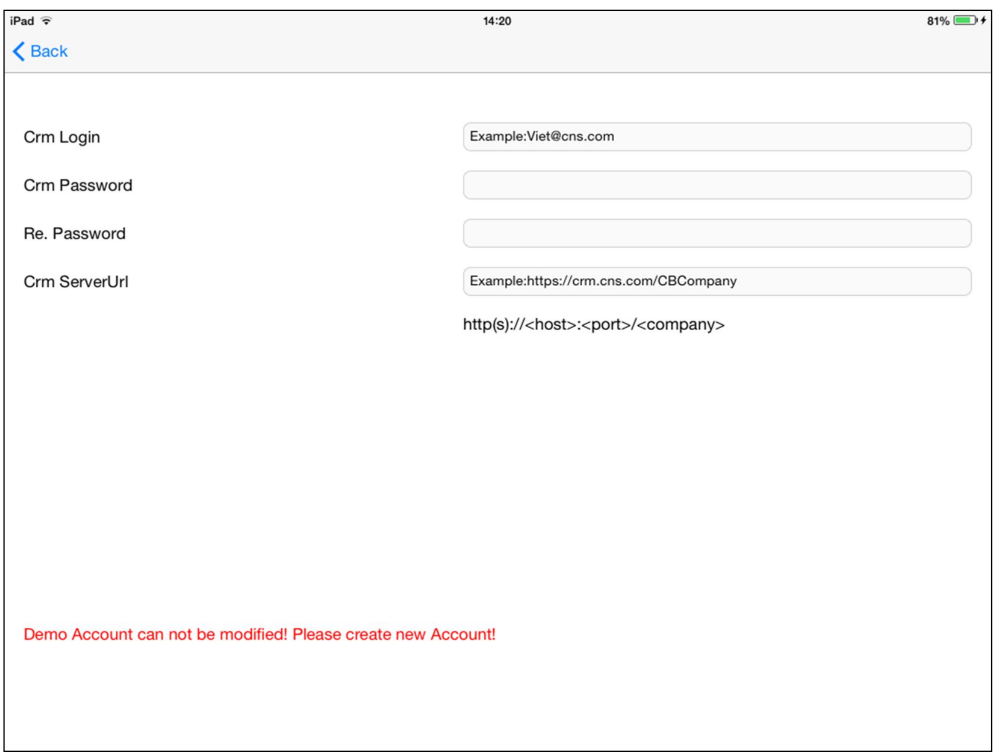
Make sure that the CRM web service can be accessed by typing the whole url into the browser and checking that you get the correct response from your CRM server service !

Example:

https://crm.cn-s.eu:1234/CrossNationalSolutions/XrmServices/2011/Organization.svc

https://crm.cn-s.eu/XrmServices/2011/Organization.svc

When all modifications have been finished, tap on the "Next" button to update the CRM account. When successful the user is notified by status message in the title or a error message is displayed in case a problem occurs.



11.19 Background Agent

The background agent is used to enable and display Notification messages.

To enable the background agent functionality, go to the "Settings" page from the main menu of the Mobile CRM app. Navigate to the "Background Agent" switch and turn the switch to ON position. A message is going to be displayed and the user has to accept in order to start the background agent. When the user declines, the "Background Agent" switch will be set to OFF position.

When the user enabled the Background Agent, the agent is going to display a Notification message in regular intervals - usually every 30 minutes, this depends on the iOS operating system.

The Notification message is going to display the number of appointments that are scheduled to start within the next 30 minutes from the time the background agent has returned its latest results.

NOTE:

If there is no appointment scheduled to start within the next 30 minutes from the time the background agent has returned its latest results, no Toast message is displayed.

11.20 Synchronization functionality

To synchronize data between the application and CRM server, the user has to tap on the synchronization icon in the apps main menu.

When taped on the synchronization icon, the synchronization process starts. During synchronization the icon animation is played. The icon is spinning around to identify the process of synchronization as running.

The user is also informed about the current status of the synchronization. The currently synchronized item is listed in the title bar with the info about the number of records that are being synchronized.

Before the application starts the synchronization process itself, application settings regarding synchronization, available connection local database schema and available disk space is checked.

It is required to have at least 256Mb of free space available before the synchronization operation is allowed to start. When not enough disk space is available or any other problem preventing the application from starting the synchronization process appears (user defined settings do not match), a warning message is displayed to the user.

The synchronization process may take extended period of time (several minutes) depending on the amount of data to be synchronized and speed of the internet connection. The amount of data to synchronize can be modified by the user in the settings page.

During the synchronization process the app response may be slower due to the heavy data processing that the synchronization process requires. It is recommended to do the synchronization process when the user is not using the device.

Important note:

To assure a successful synchronization, do not lock the screen (prevent the device to lock the screen as well) or put the device to sleep until the synchronization animation has stopped.

12 How to connect to CRM server

In order to be able to connect to a CRM server the user has to check if following conditions are met:

1. Contact your administrator and check if the CRM server has a publicly visible and running CRM server service - The application is connecting to this service to get data from CRM server.
2. Get the URL path to the CRM server service including the company identification

   Crm ServerUrl - Url link to the CRM server's web service used to connect and communicate with the users CRM server

   NOTE:

   1. Be aware that the field is case sensitive!

   2. The format how to type the url : **http(s)://<host>:<port>/<company>**

   the application will modify the link internally and add the common end tail "**/XrmServices/2011/Organization.svc**"

   Example:

   https://crm.cn-s.eu:1234/CrossNationalSolutions

   http://77.48.228.231:60127/DudeCorp

   https://www.dudecomporation.com:60127/DudeCorp

3. Prepare the Login name and password used by the user to connect to the CRM server.

When the steps 1 - 3 are done, open the application settings page and scroll down to "Account Wizard" button and start the wizard. Tap on the "New Account" button and follow the procedure to create new account.

13 Troubleshooting

13.1 I cannot connect to my CRM server

This problem may be caused by several reasons. To identify and resolve this problem follow this steps:

1. Check if the CRM server service is up and running by opening the URL in the web browser. When server service is running, a window is displayed with information about the web service. When server service is not running, an error is displayed. In this case contact your administrator to enable the CRM server service
2. Check if the CRM server service is publicly accessible - try to open the URL from different network, not the local network in company. (For example using the mobile operators 3G connection). When server service info is displayed, service is publicly visible. When no info are displayed, contact your administrator to enable and make the CRM server service publicly visible.
3. Check user Login name and Password.
4. Check the CRM Account details in the "Account Wizard" and "Modify Current Account" section. Mainly check the URL typed into the application for misspelling and errors, login name and password.

   Example of URL path to CRM service:

   http://77.48.228.231:60127/DudeCorp

   https://www.dudecomporation.com:60127/DudeCorp

5. To make sure that the SSL certificate is installed, go to the "Settings" page and tap on "Install Certificate" button. Install the certificate and try again.

These steps should help the user to connect to the CRM server. If another problems prevent the user from connecting to the CRM server, please contact the support and describe the problem.