CRMdroid User Guide
A Customer Relationship Management tool for Android Phones

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1. Introduction

CRMdroid is a comprehensive contacts, call logs, appointments, and notes management utility. It is designed for on-the-move business executives who receive many calls daily and need an effective tool to log, sort, search, and track the calls and sales leads. *CRMdroid* is effectively a personal Customer Relationship Manager.

CRMdroid main features include:

- In-call operation. The user is able to enter data associated with the caller while in conversation. This saves the user precious time.

- Phone number centric. Each data is linked to a phone number. This frees the user from having to reconcile phone numbers with notes made on paper or other devices.

- Personalization. The user can define self-titled data fields that are meaningful to his or her works.

- Synchronization of call back and meeting appointments with Google Calendar.

- Import/export data to Google Documents for back up and collaboration with co-workers.
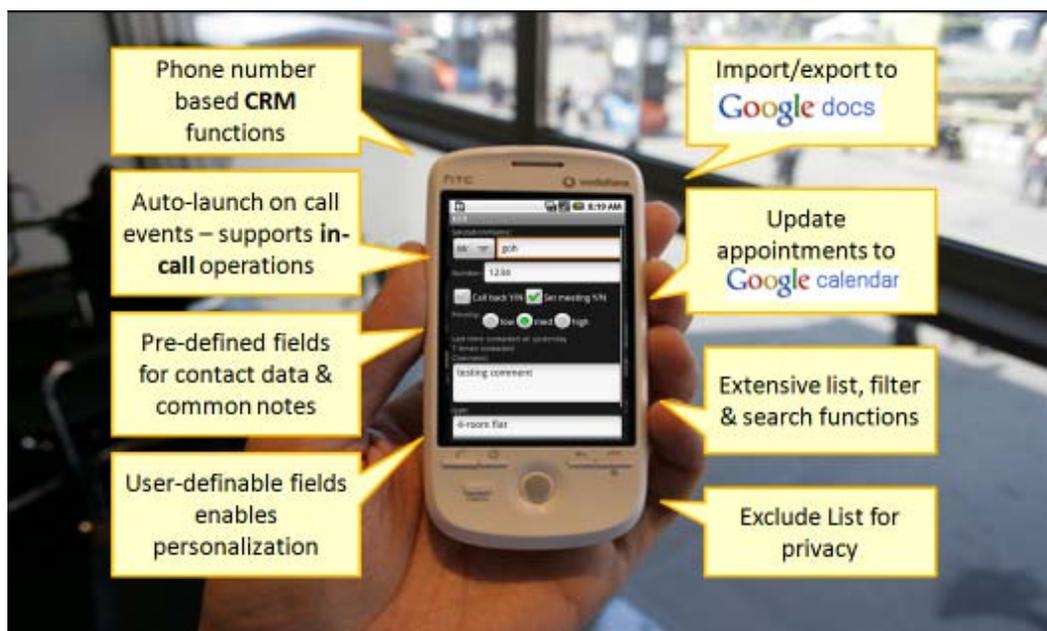
2. CRMdroid Installation

Download and install *CRMdroid* from an app store following the instructions in your Android phone's user manual.

You can drag and drop the application icon to the home page (See Figure 1) after installation.

For synchronization and data import/export to/from Google Documents/Calendar, your phone must be connected to the Internet via WiFi or mobile broadband connection.

Figure 1: You can hold and drop the icon to the home page.

3. Configure CRMdroid

CRMdroid Main Menu > Configure

Before using the application, you should set up the necessary parameters by selecting the Configure option under main menu (*Figure 2a and 2b).*
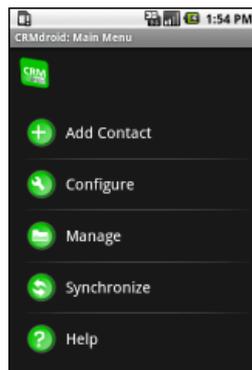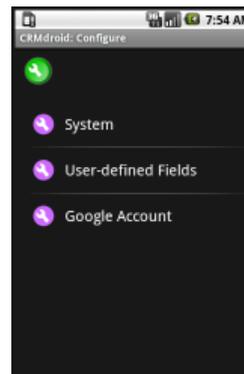
Figure 2a   *Figure 2b*

3.1   System

Select the call events that will launch *CRMdroid.* Decide if you would like *CRMdroid* to also save a new contact's name and phone number to your phone's default contact list (*Figure 3).*
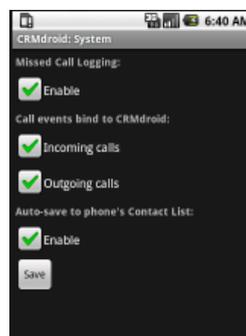

Figure 3

3.2   User-defined Fields

Define up to 5 self-titled data fields to better manage information according to your needs. To activate the fields, toggle the Enable button (*Figure 4).*
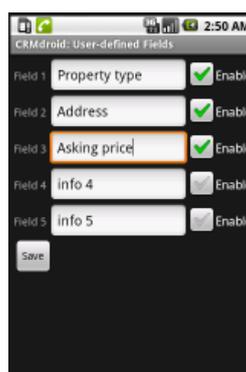

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Figure 4

3.3   Google Account

Provide your Google account login information for updating appointments to Google Calendar and import/export data to Google Documents (*Figure 5*).
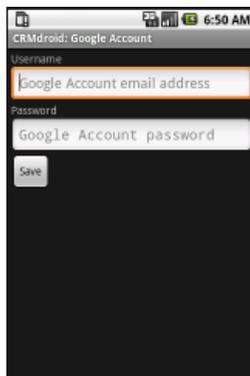

Figure 5

4. Get started

You are ready to used *CRMdroid* now. Depending on your selected call events, an incoming or outgoing call to your phone may launch the *CRMdroid* Edit Contact data entry form (see Figure 6).

If the caller/callee's phone number is new to *CRMdroid*, the form will be empty. Otherwise, the form will show details of the caller/callee including call history to aid you recall past interaction with the caller/callee. You can update the form while in conversation.

4.1   Add (New) Contact

CRMdroid Main Menu > Add Contact

This step is only required if you want to manually add a contact to *CRMdroid*.

Select the Add Contact option under main menu. A blank *CRMdroid* Edit Contact form will open.

Enter the following data associated with the contact you want to add:
     a) Saturation
     b) Name
     c) Phone number
     d) Set appointment to call back
     e) Set appointment to meet
     f) Set a priority for the contact (low, medium and high)

g) Enter a comment
h) Enter other data associated with your user-defined fields (refer to Section 3.2 above)

Select one of the following options to close the form:
- Save – save the contact and data
- Cancel – close without saving
- Exclude – put the contact under the Exclude List (e.g. for personal friends or family whose calls you do not want to be logged)
- Save and Synch – save and update Google Calendar

Figure 6

5. *Manage Information*

CRMdroid Main Menu > Manage

Under each Manage option, you can list and search the corresponding data field conveniently.

5.1   **Contacts**

CRMdroid Main Menu > Manage > Contacts

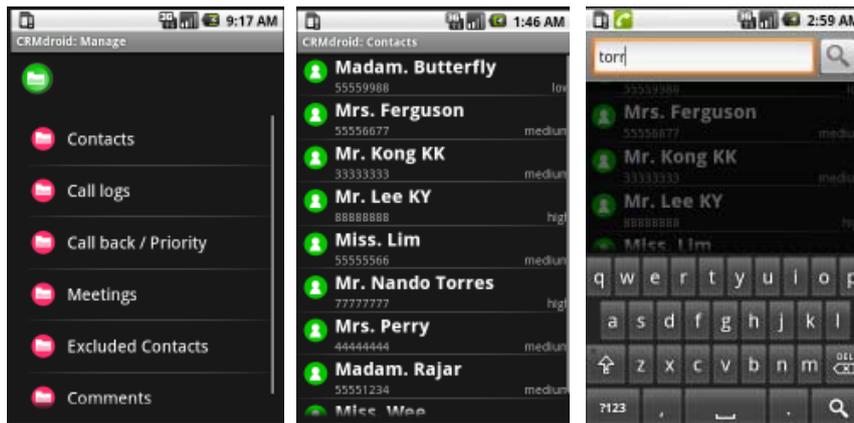This option lists your contacts in *CRMdroid* Contact List (*Figure 7*).

Figure 7

To edit a contact, a short press on the selected entry will open the corresponding Edit Contact form.

To make a call, press and hold the selected entry. A pop-up menu will appear with the Make call option. Once the call is established, the Edit Contact form will open. After ending a call, if there is no data update required, you can press "Cancel" to exit (*Figure 8*).

To delete a contact, press and hold the selected entry. Select the Delete contact option on the pop-up menu. Note that the contact will remain in the phone's default contact list if you have set up "Auto-save to phone's Contact list" (see Section 3.1).

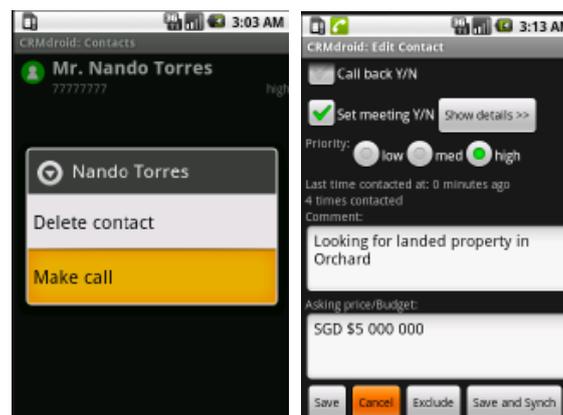By pressing the Menu key of the phone, you will have options to Add Contact and Search contact.

Figure 8

5.2   Call Logs

CRMdroid Main Menu > Manage > Call logs

This option lists the history of incoming, outgoing and missed calls.

To delete a call log, press and hold the entry. Select the delete option from the pop-up menu (*Figure 9*).

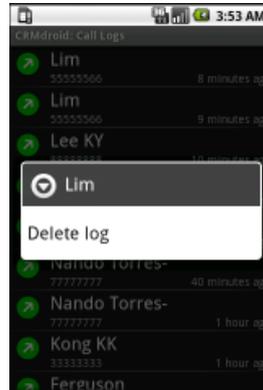To call a contact, short press the selected entry.

Figure 9

5.3   Call Back

CRMdroid Main Menu > Manage > Call back / Priority

This option lists the contacts you have scheduled to call back. The date and time of the appointment and the priority of the contact are shown.

To edit the call back setting, a short press on the selected entry will bring up the Edit Contact form. Remember to click the "Save and Synch" button to synchronize any changes with Google Calendar.

If you uncheck Call Back on the Edit Contact form, the corresponding event entry in Google Calendar will be deleted.

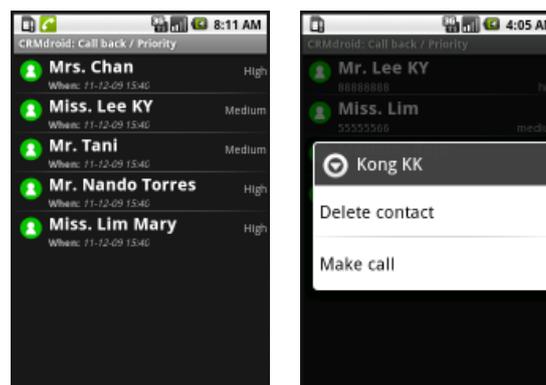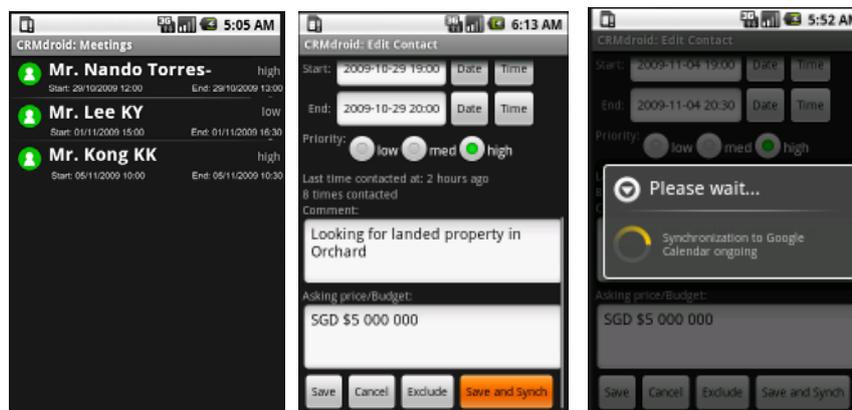To call or delete a contact, press and hold the selected entry *(Figure 10)*.

Figure 10

5.4 Meetings

CRMdroid Main Menu > Manage > Meetings

This option lists your scheduled meeting appointments. The start and end date/time of the appointment and the priority of the contact are shown.

To edit the meeting, a short press on the selected entry will bring up the Edit Contact form. Remember to click the "Save and Synch" button to synchronize any update with Google Calendar (*Figure 11*).

If you uncheck Set Meeting on the Edit Contact form, the corresponding event entry in Google Calendar will be deleted.

Figure 11

To call or delete a contact, press and hold an entry.

Note:

Call back and meeting appointments are entered as calendar events in your Google Calendar under the Google account you have set up for *CRMdroid* (see Section 3.3). This version of *CRMdroid* only supports unidirectional update from *CRMdroid* to Google Calendar
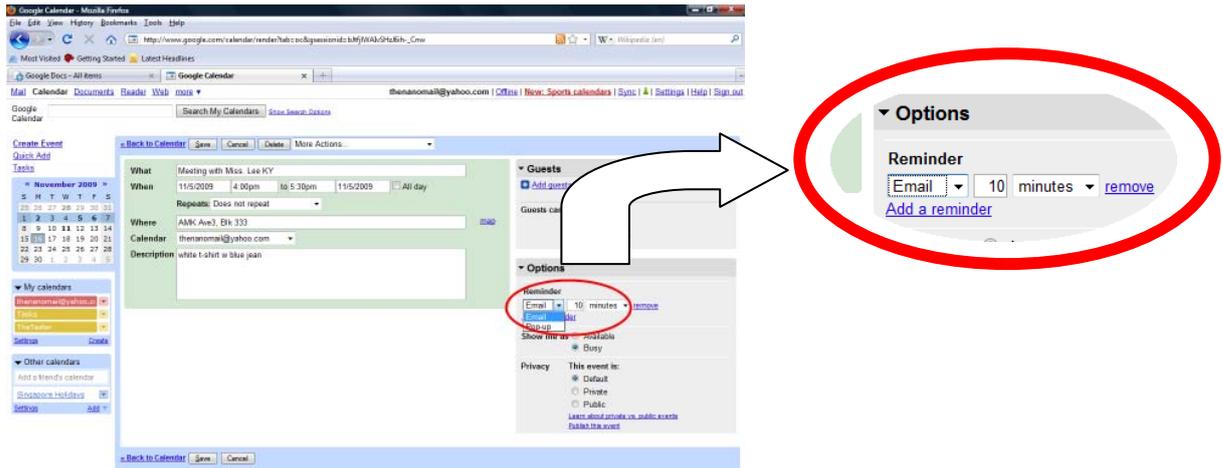
Figure 12

You can make use of Google Calendar to set up alerts for your appointments (*Figure 12*). Google Calendar currently supports email and pop-up reminders.

5.5 Excluded Contacts

CRMdroid Main Menu > Manage > Excluded Contacts

This option lists the contacts in your Excluded List.

If you select the Exclude option at the end of the Edit Contact form, the associated contact will be added to the Exclude list. This means all call events associated with the contact will not be logged in *CRMdroid*.

To remove a contact from the Exclude List, press and hold the entry. Select "Clear from exclude" from the pop-up menu (*Figure 13*). Contacts deleted from this list will re-appear in the *CRMdroid* Contact list.
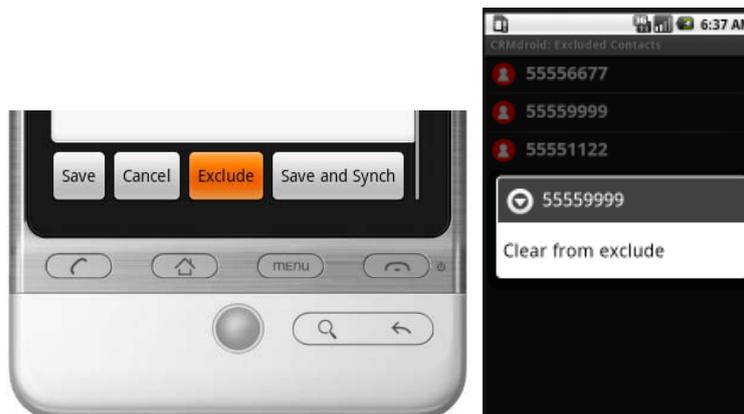

Figure 13

5.6   Comments and User-defined Fields

CRMdroid Main Menu > Manage > Comments/User-defined Field

This option lists your contacts with the comments/data in user-defined field you entered.

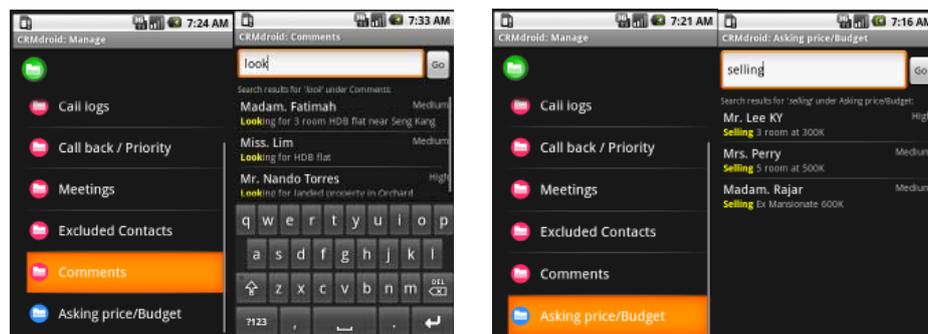To find a particular comments/data, enter a key word in the search field and press Go.

Figure 14

6. Google Calendar and Google Documents

CRMdroid Main Menu > Synchronize

6.1   Update Google Calendar

CRMdroid Main Menu > Synchronize > Update Google Calendar

This option ensures that your call back and meeting appointments are updated to Google Calendar.
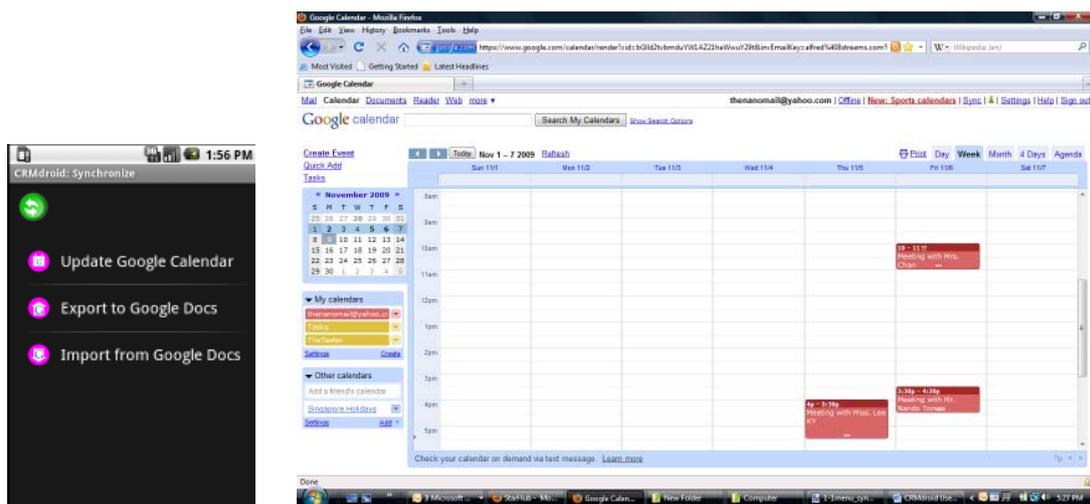
Figure15

6.2 Export to Google Documents

CRMdroid Main Menu > Synchronize > Export to Google Docs

This option let you select the data fields that you want to export to Google Documents. The data will be exported to Google Documents and will appear as a spreadsheet with the title "CRM Contacts". On Google Documents, you and other persons authorized by you to share the spreadsheet may download it to PC in various formats such as CSV and Excel (*Figure16*).

Note that if you have selected Call logs, the call logs will be exported to Google Documents and as a separate spreadsheet with the title "CRM Call Logs".
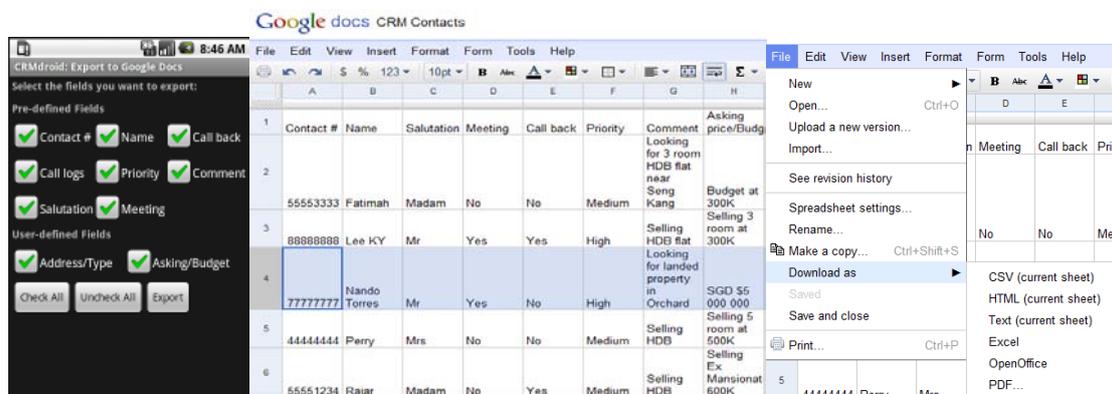
Figure16

6.3 Import from Google Documents

CRMdroid Main Menu > Synchronize > Import from Google Docs

This option let you select a CRM Contacts spreadsheet to import from the Google account set up for your *CRMdroid*.
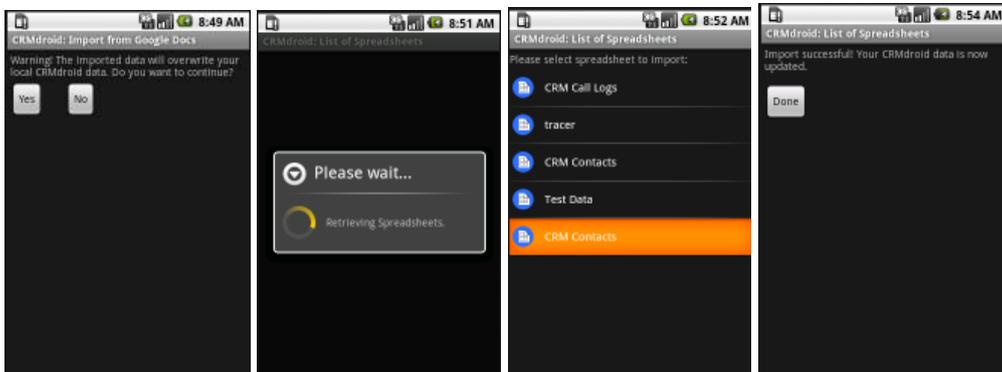

Figure 17

The required spreadsheet format is as described in Appendix 1.

Note that CRM Call Logs cannot be imported.

Caution:

All local data will be overwritten when a spreadsheet is imported. Make sure that you back up current data to Google Documents before you attempt to import.

7. *Help*

CRMdroid Main Menu > Help > About/Feedback

Information on software version and online User Feedback Form (Figure 18) can be accessed by selecting the *Help* option at the main menu.
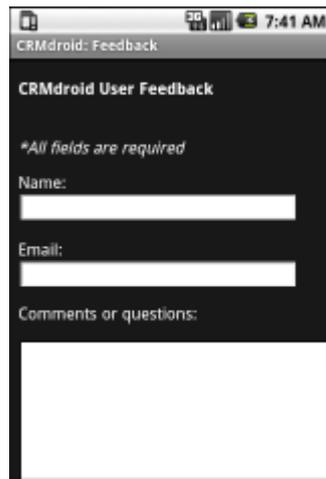
Figure 18

Message posted from the online User Feedback Form will be sent to our customer support team. Please provide your name and email if you would like to receive a reply.

Appendix 1

Spreadsheet format for CRM Contacts import
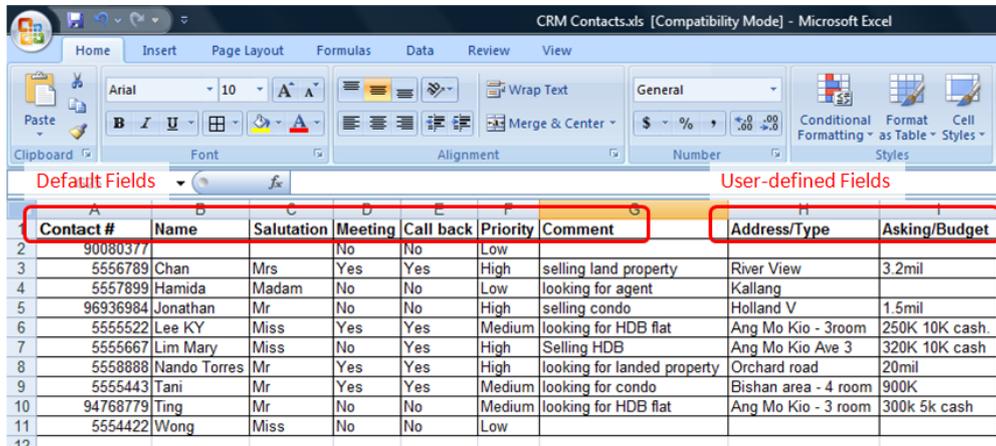
Figure 19

The field name in each column shall be in exact text as shown in the table below. These may include the names that you have given to "User-defined Fields" (e.g. "Address/Type" & "Asking/Budget" in *Figure 19*).

Field Name	Description	Data Entry
Contact #	Mobile number of the contact	Text
Name	Full name of the contact	Text
Salutation	5 forms of greeting address	None/Mr/Miss/Mrs/Madam
Meeting	Setting up Meeting	Yes/No
Call back	Setting up Call-back	Yes/No
Priority	Customer priority classification	High/Medium/Low
Comment	Input your comment/description	Text

Tips:

- You may export to Google Documents (see Section 6.2 above) right after you have started *CRMdroid* and defined your "User-defined Fields". This way you will get a blank spreadsheet with the correct field names on Google Documents. You can then populate it with your existing contacts information and import it back to *CRMdroid* (see Section 6.3 above).

- A sample blank CRM Contacts spreadsheet with all the correct field names (without User-defined Fields) can be downloaded from here (English) and here (Chinese) for your use.