CRM Gadget in Android

Install & User guide

FELLOW CONSULTING AG
User guide for Android version 1.20
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Where People work together ORACLE

Content

1. Introduction

This document is the user manual for CRM Gadget user in Android OS. It shows you how to install and use the application. CRM Gadget is also available for PC, iPhone & iPad to use for their business managed by Oracle on demand. Android phone users can find this application in Android market.

CRM Gadget for android is also known as offline application for business after Oracle on demand. It is used closely to each other in order to store data. Data can be created in android and store in Oracle on demand server via synchronization. You just carry this application with you by using android phone; you can do your business everywhere and any time you want. Application is introduced by important objects that can manage your business easily such as object Account, Appointment, Task, Contact, and Opportunity…etc that all these objects are linked together.

2. Installation

2.1. System requirement

What you need to have is a phone that has android OS. The following phones are example of android OS that support this software.

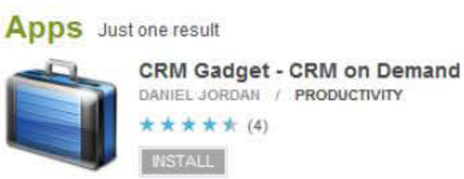
Phone name	Android version
Samsung Galaxy Tab (GT-P1000)	Android 2.2 OS
Samsung Galaxy S	Android 2.1 OS
Samsung Galaxy Mini	Android 2.2 OS
HTC Desire	Android OS, v2.1 (Eclair), upgradable to v2.2
Samsung Galaxy Tab (SC-01C)	Android 2.2 OS
HTC Evo 4G	Android OS, v2.1 (Eclair)
HTC Desire HD	Android OS, v2.2 (Froyo), upgradable to v2.3
Motorola Droid	Android 2.1 OS
HTC Desire S	Android OS, v2.3 (Gingerbread)
HTC Wildfire	Android OS, v2.1 (Eclair), upgradable to v2.2

2.2. Where to get the software

Android market is specializing in creating android applications. So you can go to its website to download the software. In search column, type "crmgadget", you will see the recent release of this software. Look at the screenshot

https://market.android.com

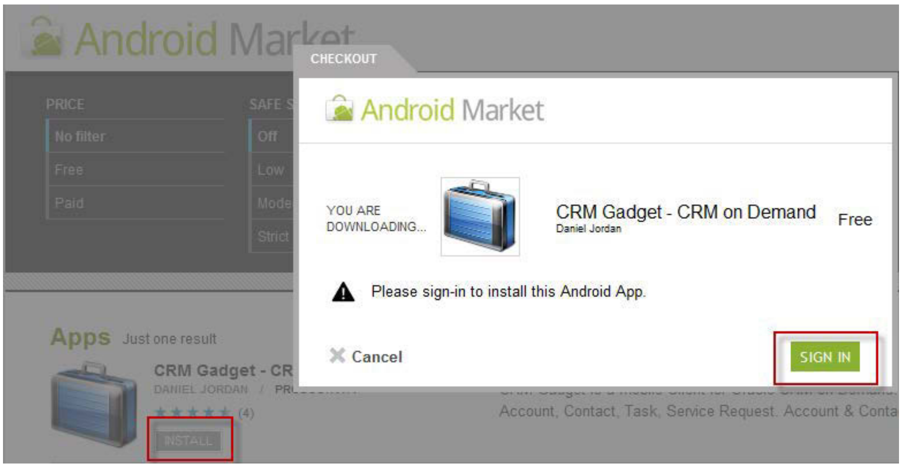
https://market.android.com/search?q=crmgadget&so=1&c=apps



2.3. Software installation

Please follow the following steps to install in software into your phone.

1. Click INTALL button then you will be asked to sign in



2. Sign in to download software
3. After you signed in, the application will download automatically
4. Follow its instruction to install
5. After installation finished, you will be asked to complete the Preference
6. You can also find the application icon in your phone application.
7. Take a look at these screenshots

3. User Manual

3.1. First start

3.1.1. Understanding about CRM Gadget icon

If it is already installed in your phone, there will be an icon as the following screenshot

Figure 1-Application icon

Figure 2-Application icon zoom

3.1.2. Getting started the application

Click on CRM gadget icon. You will see the screen with CRM Gadget version, Main menu and Settings.

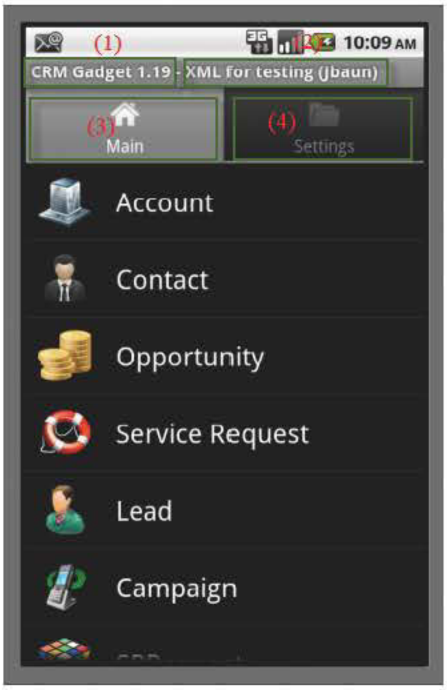


Figure 3-Main Interface

(1) CRM Gadget Version
(2) Current using XML name reading from OOD
(3) Main Menu contains all Objects, Calendar and Recently viewed
(4) Setting Contains Preferences and Synchronize

3.2. Main Menu

Note: In Main menu has as many objects as possible according to XML configuration from Mobile Configurator. If you are not using XML from OOD, the default XML in application is automatically read and only some of objects in the chart are enable. The following chart is showing all objects in Main if all objects in XML are enable.

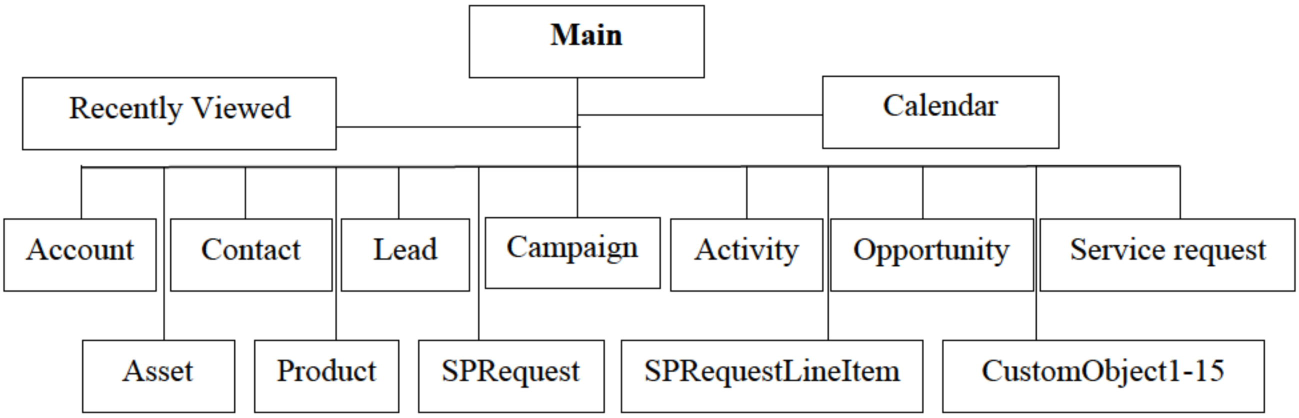


Figure 4-Main structure Chart

*****Concept for some objects for business**

- **Account**: He/she is my account because I think they are my current customers or the customer that will buy my product or service.
- **Contact**: He/she is my contact because I can contact them for detail information about the company or buyer that will buy my product or service
- **Lead**: an individual or organization that expresses an interest in my goods or services
- **Service request**: A request from customer to change something for something, improving the quality of product etc.
- **Campaign:** is a plan to attract people to buy the product, He/she will become audience unless they are interested in our product.
- **Task:** I create a task to deal with customers
- **Appointment:** I create an appointment or appointment is created by customer to speak about my product and service in detail.
- **Call:** I create a call to contact to ask about the company or to ask about product and service request.
- **Opportunity:** I evaluate my opportunity to win customer in percent and find the reason that will cause my transaction fail.

3.3. Setting

Settings should be the very important place because users cannot go to any further uses of application if it is not configured properly. Before using application, make sure that setting is set correctly, especially in Preferences. User should think about environment and XML they will use. For user environment (log in) is configured in Connection. For XML is configured in Advanced in Configuration Name and Mobile Configurator. After Preferences was set, users can go back to Settings and do the Synchronization for downloading the data from OOD. In Figure 11 is showing the organization of Settings. Settings are divided into two sections, Preferences and Synchronize. Preferences are divided into three sections-Connection, Transaction and Advanced. In each section has more detail when you click on it.

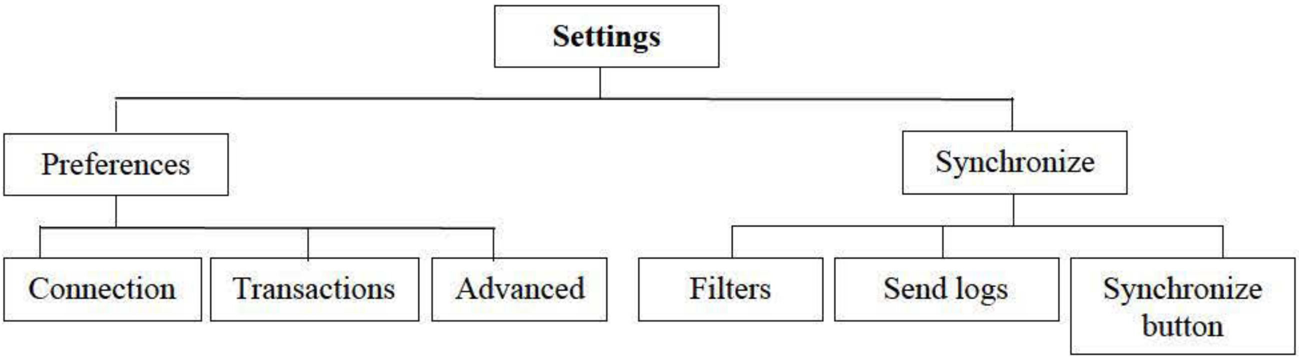
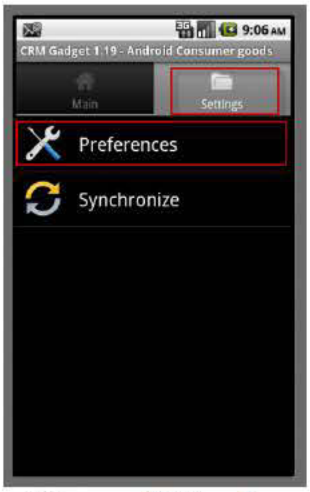


Figure 5-Settings structure Chart

3.3.1. Preferences

Before you can use the application and create the transactions, you need to set up your preferences. In Figure 12-15 shows how to configure in preferences.



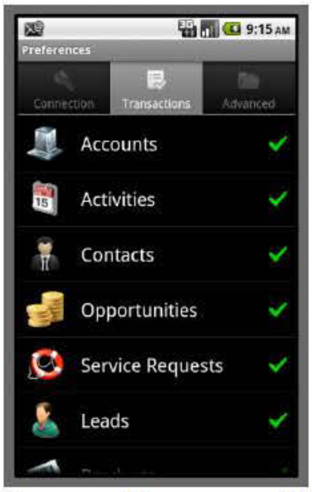
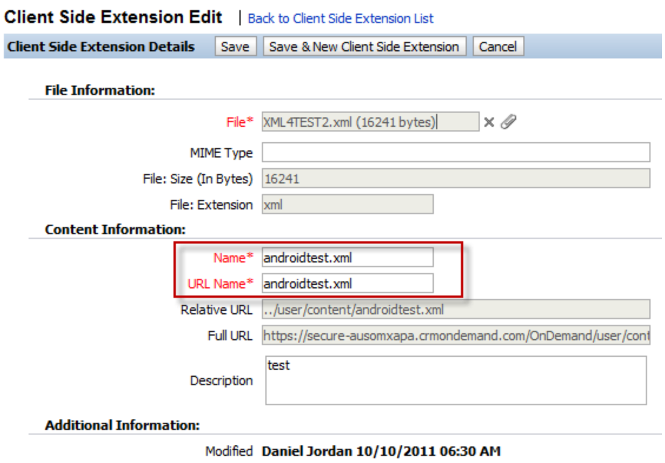


Figure 6-Preferences Figure 7-Connection Figure 8-Transaction Figure 9-Advanced

❖ Preferences Configuration Explanation

- Preferences-Connection
  - URL (more commonly known as the internet address) of your CRM OnDemand instance. Usually something like https://secure-ausomxapa.crmondemand.com
  - User name Your CRM OnDemand Username
  - Password Your CRM OnDemand Username
  - Click Test Connection button to make sure that you are connected to Oracle server.
- Preferences-Transaction
  According to new version update, transactions is configured in XML. Transaction shows the filters (owner filters and last modification filter).
- Preferences-Advanced
  There are three settings in Advanced. They are Synchronize on start up, Configuration name and Reinit database. See Figure 15.
  - Synchronize on start up
    There is a checkbox to enable Synchronize on start up. The sync will sync every time you start the application if you check on this checkbox. Uncheck to disable sync on start up.
  - Configuration name
    Configuration name is the name of XML that is configured in OOD client side extension. The configuration name must be the same between OOD and Android. Configuration name can also be changed according to the number of XML user in OOD.
    See Figure16-17



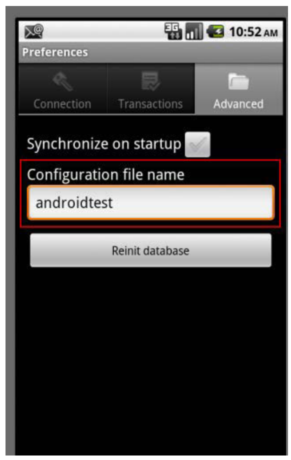


Figure 10-Configuration name in OOD Figure 11-Android Configuration name

3.3.2. Synchronize

CRMGaget for android is an offline application so when it is run for the first use it will be an empty database. In order to get data, you need to sync with OOD. XML, Metadata, and records are read during synchronization. Metadata is synced only the first synchronization, but in case there are some metadata changes the sync will start reading metadata again. The database will be created automatically after sync is completed and the records then display in each object.

Note: Metadata are things like the name of fields, lists of available fields and picklists.
Metadata changes refer to changes of fields on server. For example: New fields or picklist are created.

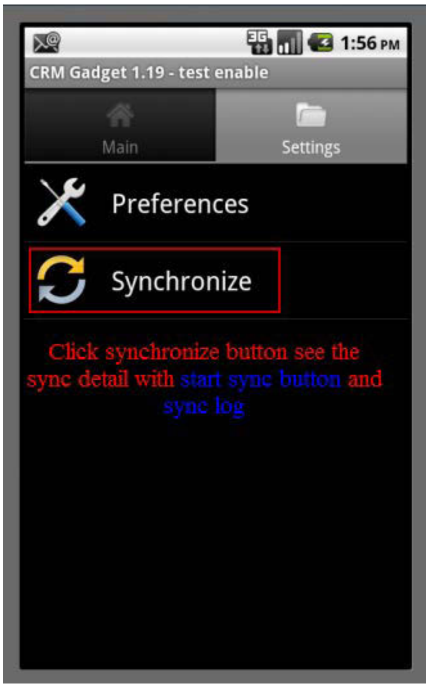


Figure 12-Setting-Synchronize

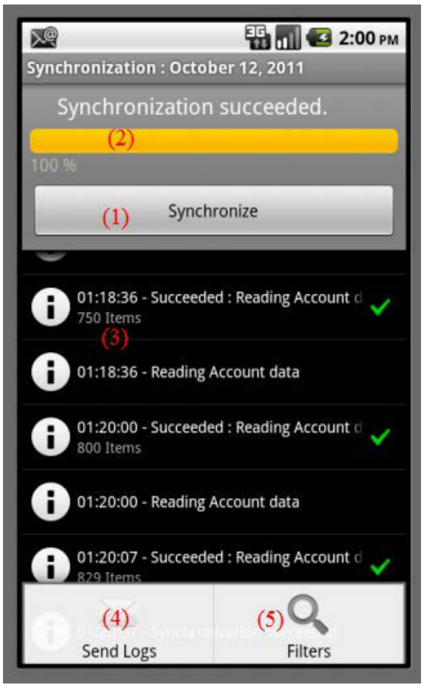


Figure 13-Sync detail screen

Figure19:

(1) Sync button-click sync button to start synchronization
(2) Sync measurement shows the percent of synchronization
(3) Sync log shows the information of sync action.
(4) Send Logs all log in sync log will be displayed in detail when we click on it. The will be sent to developer support.
(5) Filters has syn error log, Warning and All

❖ **To start sync**

- Go to Settings
- Setup the Preferences
- Click Synchronize icon
- Click Synchronize button
- Click Menu to view Send Logs and Filters
- Click Send Logs there are some error and you want to report to developer support by email
- Click Filters if you want to view only one logs.
  For example : you want to view only Error message so you need to choose “Error” filter

❖ Sync Log (error and warning)

Sync log error and warning will then display if there are some error with XML, object access denies, object records error and connection error etc. There are some cases that cause the sync error. You just click on sync log if you want to see sync log detail. All error and warning logs have their detail explanation so you can follow the log to solve the problem. For error on records in each object, the error log will then appears when you go to the record detail.

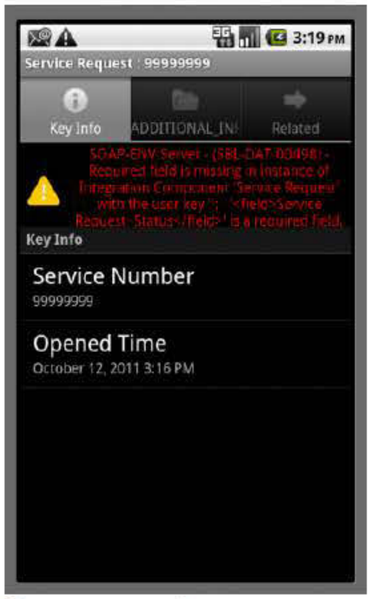
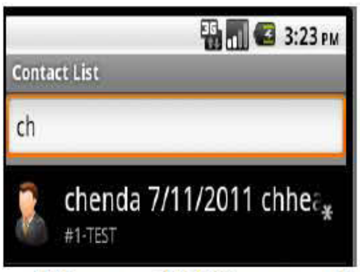


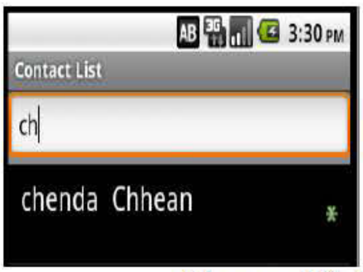
Figure 14-Sync log-Connection error Figure 15-Sync warning
Figure 16-Sync warning-record error

3.4. Modification flag

The color of asterisk modifies the status of records.

- Gray asterisk for records that are just updated
- Green asterisk for new records
- Red asterisk for error records that display after synchronization





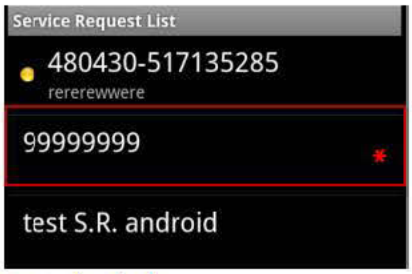


Figure 17-Gray asterisk Figure 18-Green asterisk
Figure 19-Red asterisk

3.5. Entering transaction records

CRM Gadget in android is an update for users to view and check their customer records by using phone anywhere and anytime. Users can also edit, delete information on this application. Before you can enter all records in entities, you need to complete (URL, Username and Password) and synchronize first. After successfully synchronized, you just click Entities. You will see the transactions. Click one of transactions to view your records. Here users can search, edit, delete the record name to update their customer records.

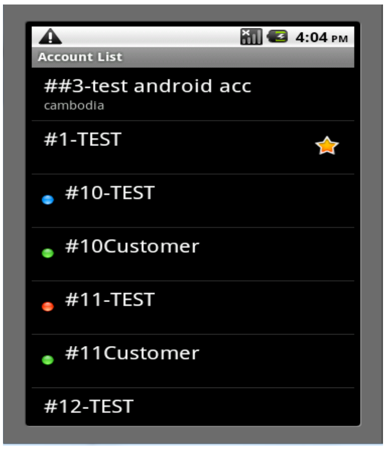


Figure 20-Account list

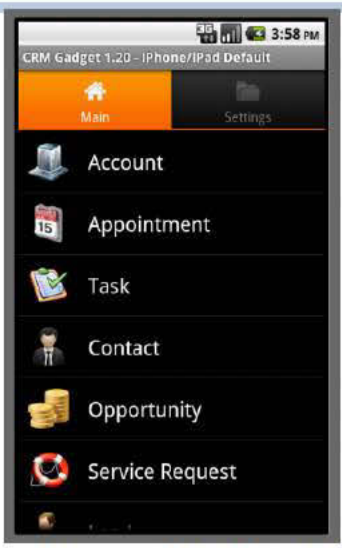
Figure 23 shows the Account record list. These records will show you more details when you click on them. All these records can be created in Oracle on demand. Record could be Account record, Activity record, Contact record, Opportunity record and Service request record.

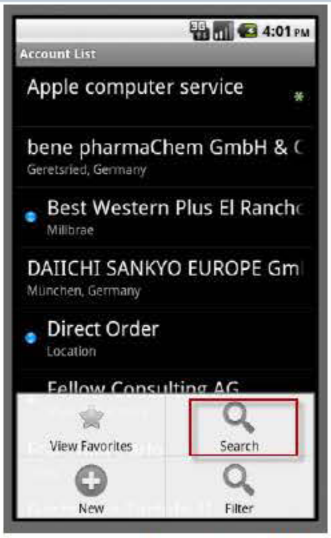
- Entering the records
  - go to Main
  - There is a list of objects, click one of objects
  - If the object has records, it will shows the list
  - Click on records to view records detail

3.6. Search for object records

In case there are so many records added, they will spend your time to scroll to find one record you want to work on it. So if there are so many records in the record list, you can search for them. It is fast and easy. Search can find the word among many word in records not only start-with search. For example: You want to search “Apple computer service” then you can type the “apple, computer or service”

- Search record in record list
  - Go to object record list
  - Click Menu
  - Click Search button
  - Type the letter or word you want to search





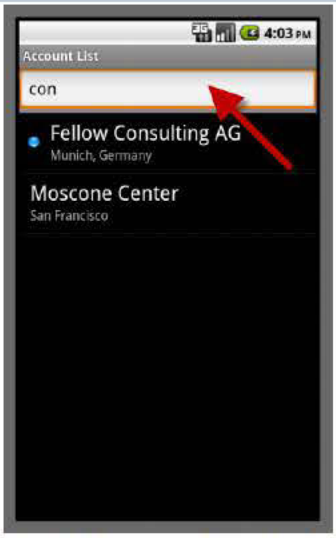


Figure 21-Object List Figure 22- Account record list Figure 23- Search column for typing

3.7. Search filters in object records

There many records in each object. Those records are categorized with it filters so you can search those records with their filters.

❖ Search records with their filters

- Go to object record list
- Click Menu
- Click filter button
- Select the filters

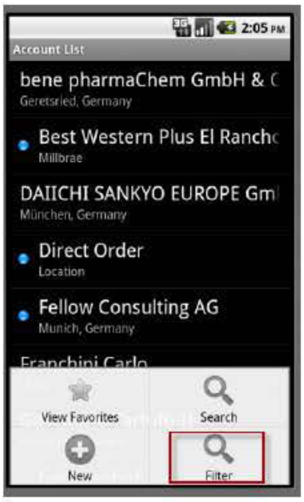


Figure 24-Filter button Figure 25-Filter list

3.8. Edit Records

Generally, you can update record information if you own the record, you manage the owner of the record, or the owner grants you editing access to the record. However, your company administrator can adjust access levels to restrict or expand your access to records. The edit button will be possible to edit if you have privilege from administrator to edit it. Otherwise if you do not have privilege to update the records then the update button will be hidden.

❖ To edit records

Method 1

- go to Main
- Choose the objects you want to edit its records
- Click on records to view records detail
- Click menu and then on edit button
- Edit record values
- Click update

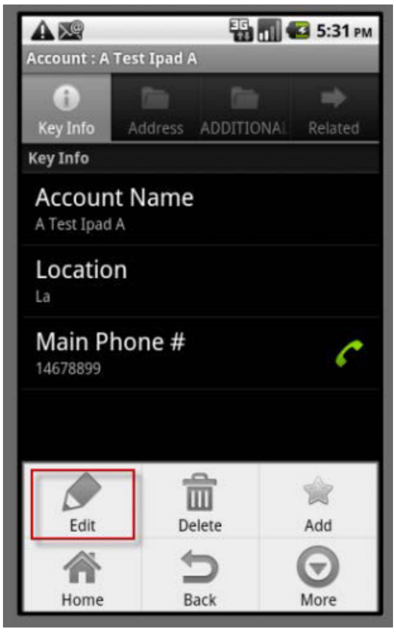


Figure 26-Edit button

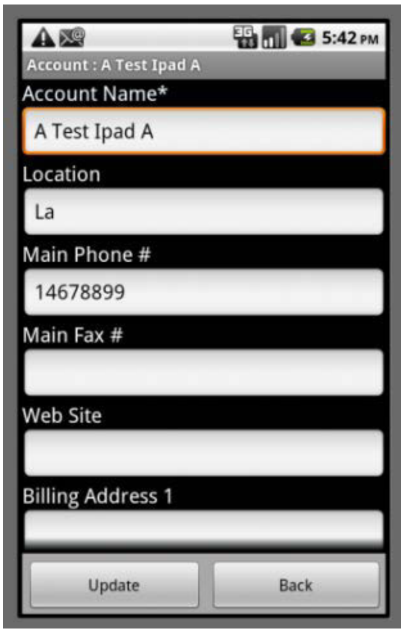
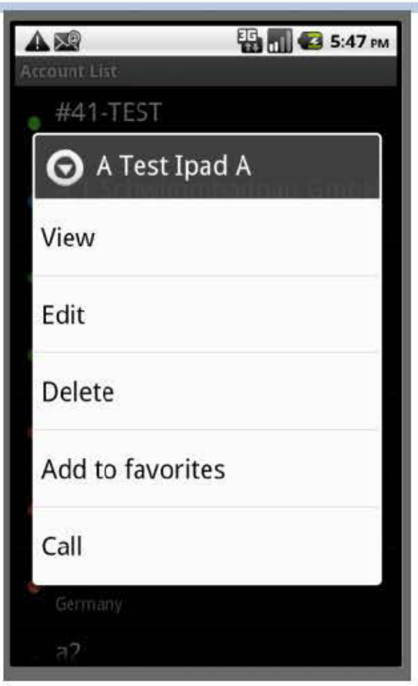


Figure 27-Update button

Method 2

- go to Main
- Choose the objects you want to edit its records
- Long click on record
- Edit record values
- Click update



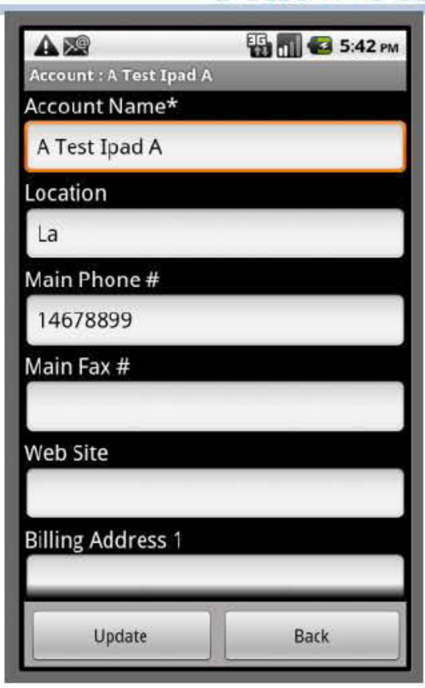


Figure 28-Long Click edit Figure 29-Update button

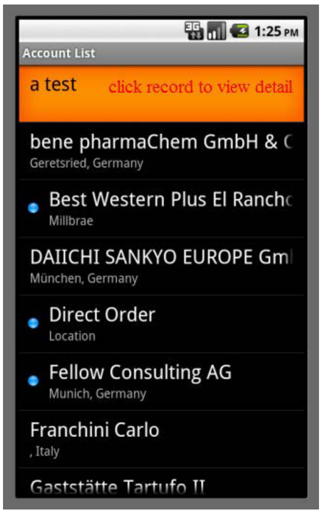
3.9. Delete Records

You can delete a record if your access level to that record allows it. The delete button then will be hidden you do not have access to use it by administrator. The records will lose from the list after they are deleted. There are two methods to delete the records. User can delete records via delete button at menu or long click on records.

❖ To delete a record

Method 1

- Go the object that you want to delete its records
- Click one of records to view records detail
- Click on menu
- Click on Delete button
- Click "OK" on confirmation message



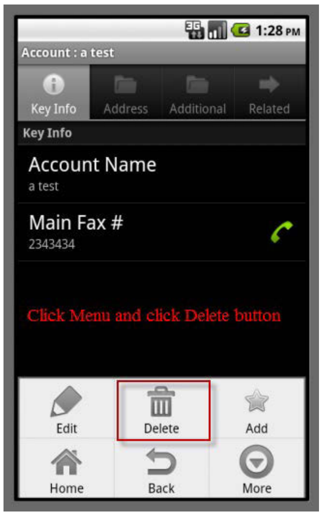
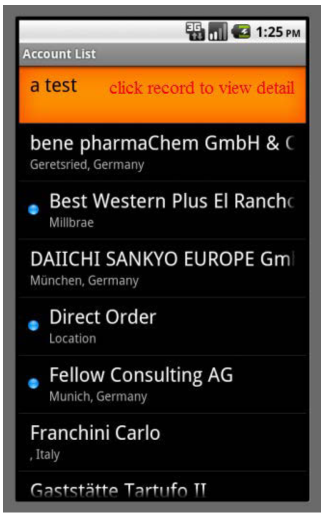


Figure 30-Objects at Main Figure 31-Record list Figure 32-Record detail

Method 2

- Go the object that you want to delete its records
- Click one of records to view records detail
- Long click on record
- Click ok on message



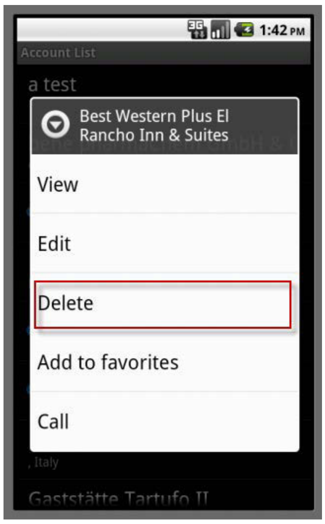


Figure 33-Objects at Main Figure 34-Record list

Figure 35-Long click popup

3.10. Create new record

You can create a record from different objects within the application. The object you choose depends on whether the transaction you working on.

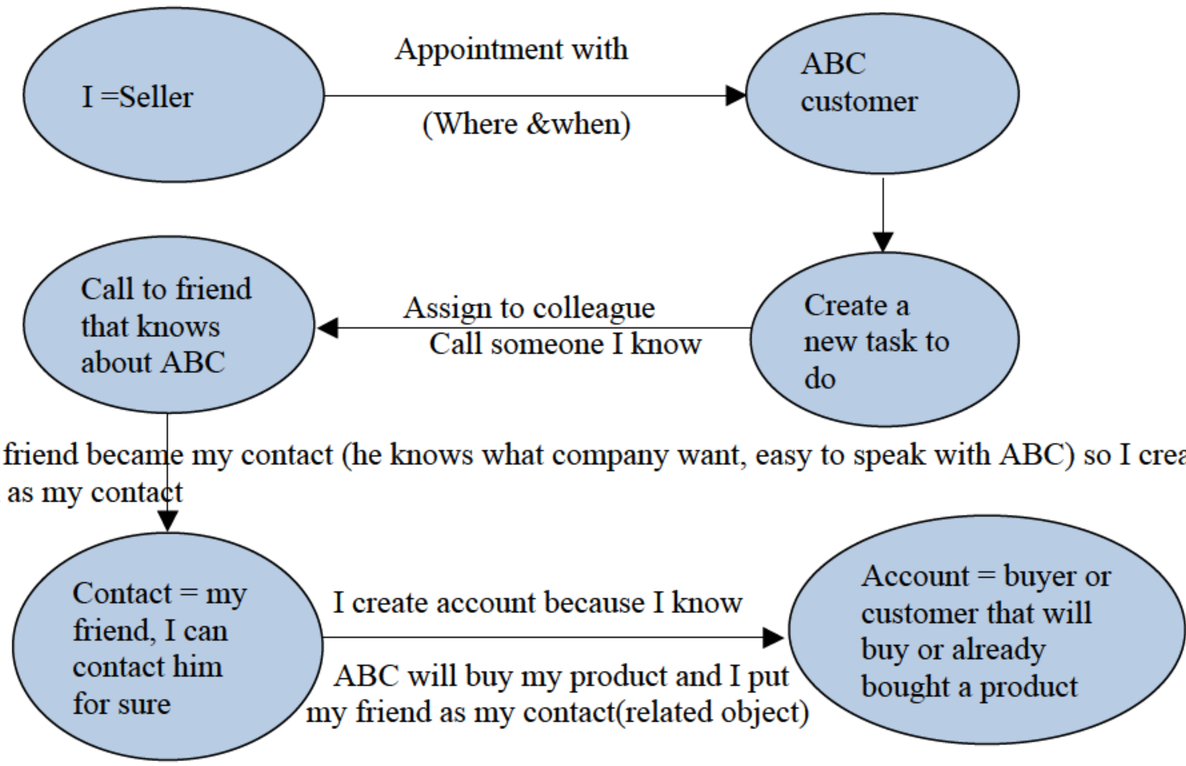
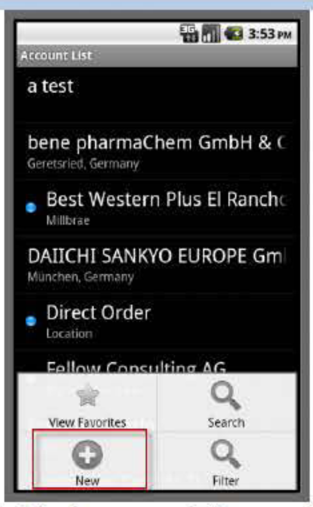


Figure 36-Example of transaction decision

- To create new record via Method 1 (Menu)
  - Choose the object you want to create a new record, for example Account
  - In Main, click object Account
  - Click Menu
  - Click New button
  - Complete the object value
  - Click Create button to finish your transaction



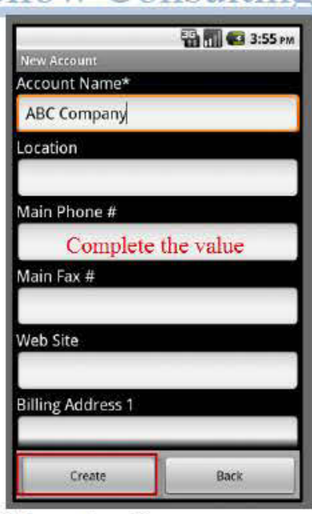


Figure 37-Objects at Main Figure 38-New button
Figure 39-Account table

3.11. Action buttons

The Action buttons were developed for CRM for android in order to be easy of users and also can save so much time in creating records. In this version of CRM, the action is presented with Clone, Log Call and Visit Report.

***Important notice:

- After cloned records are made, the records stay in the object that is cloning.

Example: You clone records in Account so after clone fished, the records stay in Account.

- After Log Call records are made, they will run to object Task
- After Visit Report records are made, they will run to Appointment

3.11.1. Clone

Clone is an action of how to make multiple identical copies of records in each object. Some old records are nearly the same value as new one that you will create into your transactions. In this case you have a good choice to save you time and it will faster than expected if you choose Clone Action.

❖ To clone a record

- Go record that you want to clone
- Click record that matches to your transaction to view detail
- Click Menu
- In object Account and Contact are presented with More button. When you click on More button, there will be a list for action including Clone.
- In other Objects are presented with Clone button
- Click clone button to copy your record

Figure 40-More button Figure 41-Action list in More Figure 42-Stand alone Clone

3.11.2. Log Call

The Log call is also known as a task for you to complete. You plan to call your customer in any date for the next appointment. Log call is generally presented in Account and Contact. The subject of Log call will be Account name is you create it in Account. The subject of Log call will be Contact first name and contact last name if you create it in Contact. Please see *Figure 38* for screenshot.

- Log call subject = Account name in Account
- Log call subject = Contact first name and contact last name in Contact

❖ To create a Log Call

- Go record that you want to create a Log Call
- Click record that matches to your transaction to view detail
- Click Menu
- In object Account and Contact are presented with More button. When you click on More button, there will be a list for action including Log Call.
- Click Log Call to create new Task
- Click Create button to finish

3.11.3. Visit Report

The Visit Report is also known as Appointment. If you create a visit report, the records will run into Appointment. Visit Report is generally presented in Account and Contact. The subject of Visit Report will be Account name is you create it in Account. The subject of Visit Report will be Contact first name and Contact last name if you create it in Contact. Please see *Figure 38* for screenshot.

- Visit Report subject = Account name in Account
- Visit Report subject = Contact first name and contact last name in Contact

❖ To create a Visit Report

- Go record that you want to create Visit Report
- Click record that matches to your transaction to view detail
- Click Menu

- In object Account and Contact are presented with More button. When you click on More button, there will be a list for action including Visit Report.
- Click Visit Report to create new Appointment
- Click Create button to finish

3.12. Related Objects

You can link one object to another object. The object that you linked is called Related Objects. All objects in CRM have relationship to each other. This is the cycle of business. CRM stands for Customer Relationship Management, so CRM for Android is a tool to manage your Customer Relationship to ensure your business run very well in your transaction. In each company has a different concept of objects that will link together. In CRM for Android has a default related object for you to insert for you business purpose.

3.12.1. Insert Objects as relations

The objects can be linked in android via relation from its default. In the near future, Android can read all related objects configured from Mobile Configurator application using by admin. Currently you can insert some objects as relations, to do so see the steps below.

❖ To insert objects as relations into your existing records via Edit

- Go to object record list, e.g. Account list
- Choose a records you want to edit with relation
- Click record to view its detail
- Click Menu
- Click Edit button
- Scroll down
- There are several related object for you to choose
- Click related object column, there will be the list of related objects. Choose one of them.
- Click update button to finish

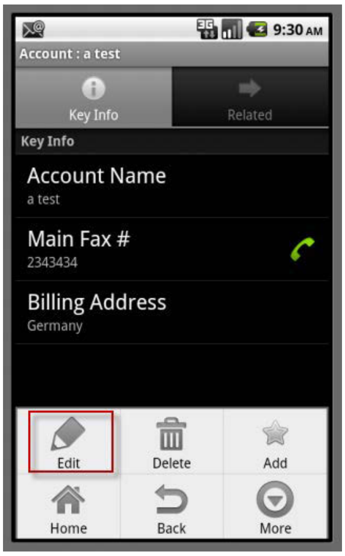


Figure 43-Edit button

Figure 44-Related object column

❖ To insert objects as relations when you are creating a new record

- It is the same as you create a new records

- Go to object record list
- Click Menu
- Click New button
- Scroll down
- Click related column to add its relation

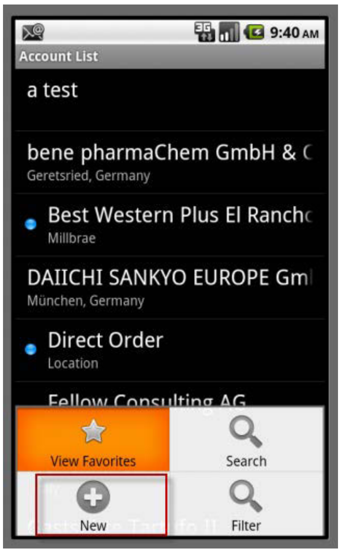


Figure 45-New button Figure 46-Related Object column

3.12.2. Delete related objects

In the Screenshot, you see Direct Order was added as Parent Account and Daniel Jordan was added as Primary Contact. So they are called related object. You can delete these objects from relation just follow the few steps below:

❖ To delete the related objects

- Go related object that you want to delete
- For example: if you want to delete Direct Order from Parent Account, then you will need to click on button with basket bin picture.

Figure 47-Before deletion

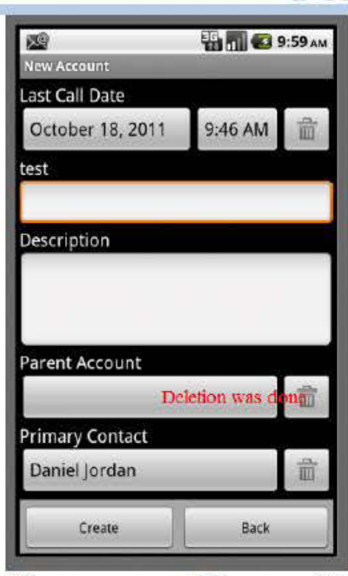


Figure 48-After deletion

3.12.3. View related objects in record detail

You can view all your related objects that you already inserted to your record. If you are using CRM for Android introduce by pages, then you need to go to Related tab after you view record detail to view your related objects. In Figure 46 show the list of related object in Account record.

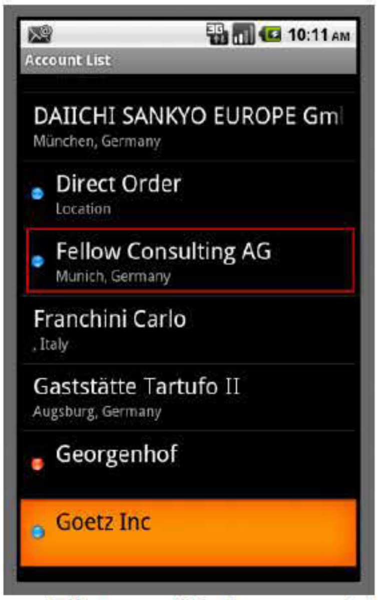


Figure 49-Account List

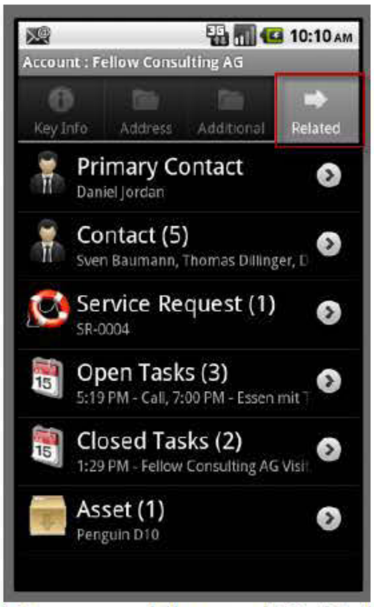


Figure 50-Related objects

3.13. Merge Contacts to address book

The contacts are recorded in object Contact in CRM application. Your personal contacts are recorded by you in address book. These two kinds of contacts are now can be merge together into your Address book. You can export contact to address book one by one via contact list if you think that it is important to keep those contacts into your address book.

❖ To merge contacts to address book

- In Main, there is an object Contact
- Go to object record list
- Long Click on contact record that you want to add to your address book

- In popup list, choose Merge Contact with address book
- Go to your personal contact you will see them

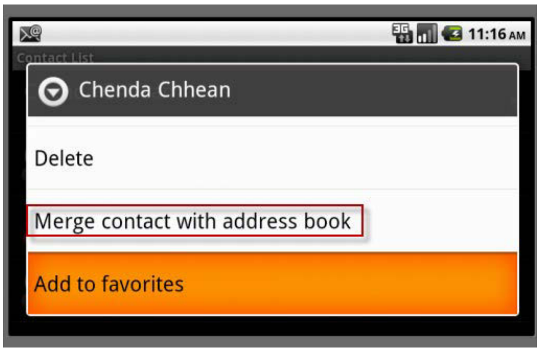
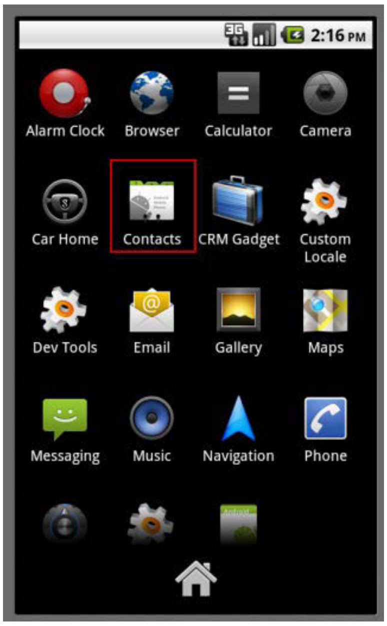


Figure 51-Contact List Figure 52-Merge contact to address book

❖ Finding contact in your address book

- Click Home
- Click Menu then you will see many icon
- Click Contacts icon
- Verify your contact from CRM application



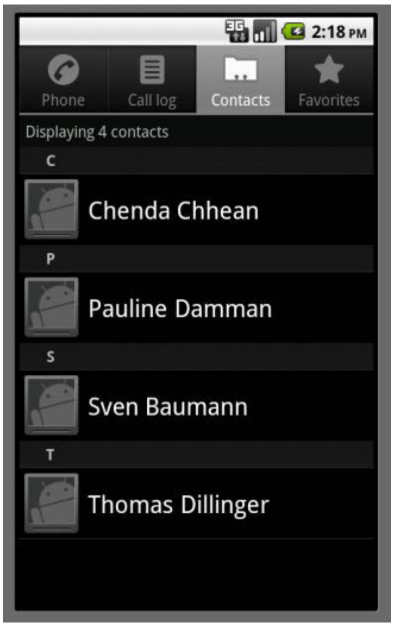


Figure 53-Address book Figure 54-Contacts after merged from CRM

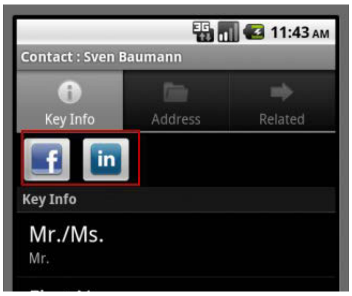
3.14. Facebook and Linked-In

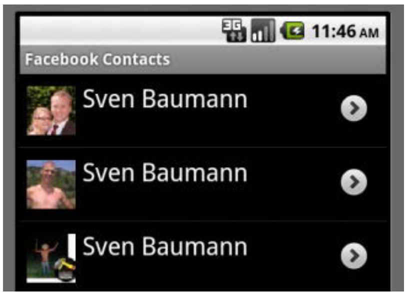
We always work closely with contacts. You can do such a thing in order to contact your contacts such as call, sending an email. You can know your contact clearer via Facebook and Linked-In. Facebook and Linked-In can link to contact with their photos and some more important information that make you easy to manage your relationship with them.

❖ To linke contact to Facebook and Linked-In

- In Main, there is an object Contact

- Go to object record list
- Go to contact record detail
- In contact record detail, it has two buttons-Facebook and Linked-In
- Click Facebook button to link to Facebook Contact
- Click Linked-In button to link to Linked-in Contact
- Please note that if contact has only one in Facebook or Linked-In, It won't show the list it popup with Facebook or Linked-In widow





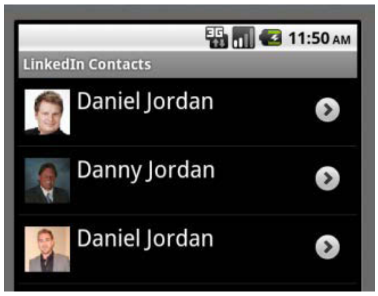


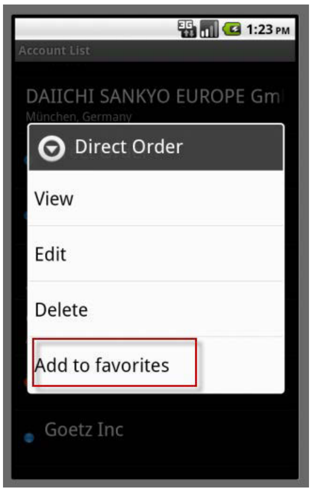
Figure 55-Facebook+Linked-in button Figure 56-Facebook Contacts List Figure 57-Linke-in Contact List

3.15. Favorites (add, remove and view)

To be easy to find records, users can add/remove them to/from favorite. The favorite is introduced by star sign. You can add or remove the favorite for every record you want. You also can search the records marked as favorite.

- To add records to Favorites

- In all objects have their records
- Go to record detail or you can long click on record
- If you go to record detail, you need to click Menu and click and Add to favorite button
- If you long click on record detail, you can add to favorite detail



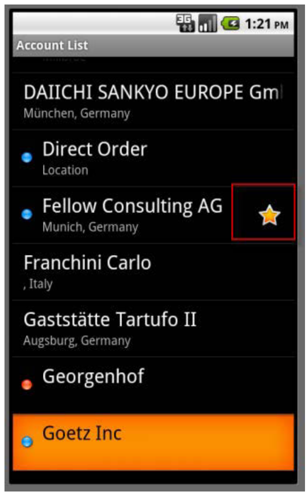
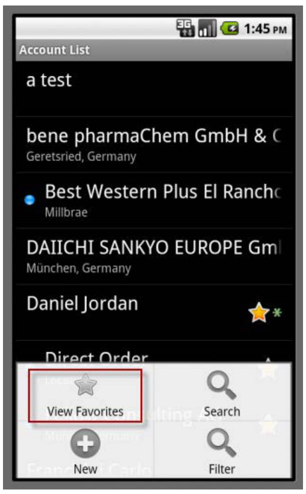


Figure 58-Add to favorite button Figure 59-Long Click on record Figure 60-record with Favorites

❖ To view records with Favorites

- After records are added to favorites
- Go to record list
- Click Menu
- Click View button
- There will be the record list with favorites



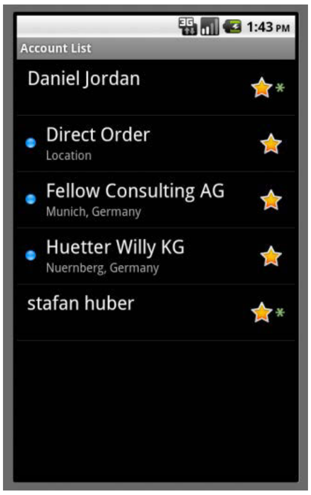


Figure 61-View Favorites button Figure 62-Record with Favorite

❖ To remove records from Favorites

- You can remove Favorite from records with Favorites
- Long click on records with Favorites => choose Remove From Favorites
- Or view records detail => Menu => Click remove from favorite button

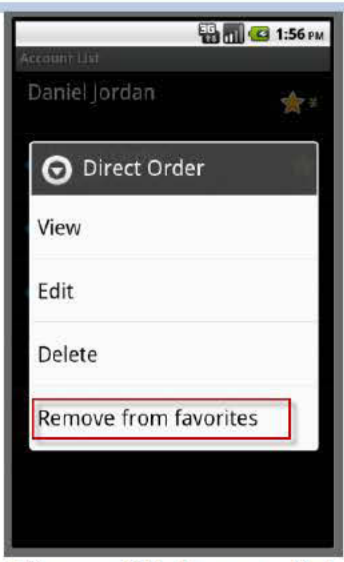


Figure 63-Long click remove

Figure 64-Menu Remove

3.16. Configuring email in contextual menu and sending a message to contact

If contacts have an email, it will be available for to send an email to them. Before you can send an email to a contact you need to configure you email address into your contextual menu. If you don't know how to do this you can see the step below:

- To configure email in contextual menu
  - In your phone has a Menu, go to it
  - Click Email icon
  - Complete your Email address
  - Complete displayed name

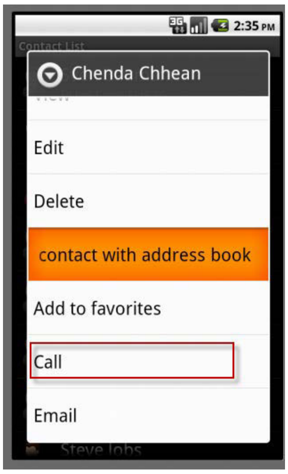
- To send an email to contact via CRM for android
  - After you already configured email in contextual menu, you can run CRM application
  - Go to contact list
  - Log on contact that has email
  - Choose Email
  - Compose email and send

3.17. Call a contact

The information of contacts is enough for you to do what you want to contact them. You can call your contact via contact detail or long click for call. Some contacts that have no phone number, long click will not show the call button for you to call. It will start to call if you click on phone number in contact detail.

- To call a contact
  - Go to contact list
  - Choose the contact record that you want to call
  - Long click on it and choose call button

- Or click contact for contact detail and click phone number to start a call



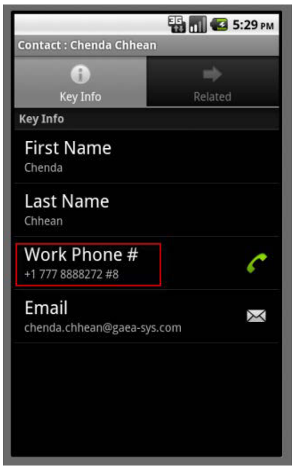


Figure 65-Long click call Figure 66-Phone number call

3.18. Calendar

Calendar is the place for user to preview appointment records. There are four tabs in calendar. They are Month, Week, Day and List. Records are viewed with small green points. The numbers of green points have different meaning. There is only one record if you see one green point. There are three or more than three appointments if you see three green points.

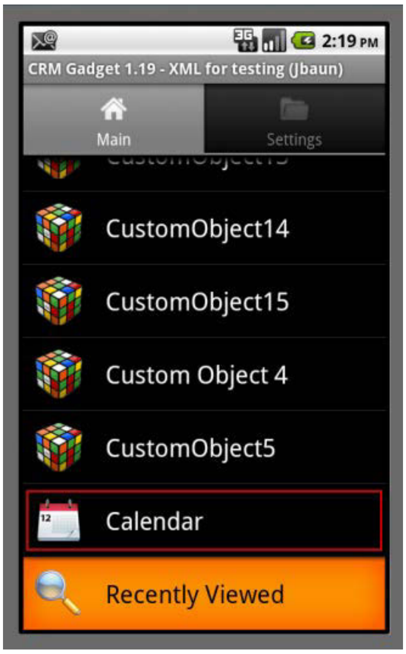


Figure 67-Calendar icon Figure 68-Calendar List

- To view the appointment record in Month, Left click on green sign
- To create new appointment record in Month, Long click on green sign or left click the space(see Figure 7 for Month)

- To view Travel Map, Long click on day in Month with more than one record that has relation with account. Account records must have the right address. Click View Travel Map to view. (see Figure 7&9)
- To view, Edit, Delete appointment record in Week, Day and List, Long click on green sign (see Figure 8)

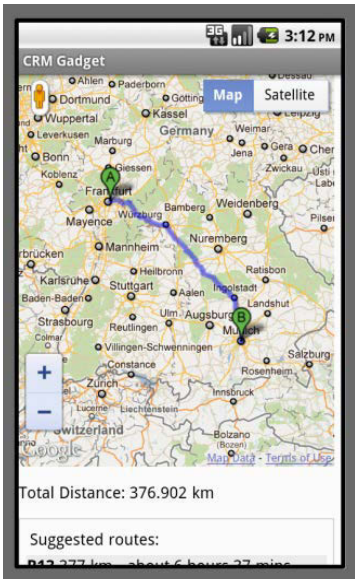
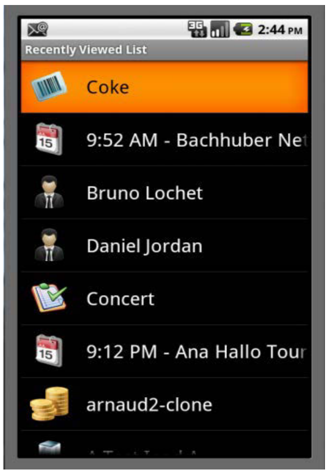


Figure 69-Month Figure 70-Week, Day and List

Figure 71-Travel Map

3.19. Recently Viewed

You can view your records that you have clicked on them by going to Recently viewed at Main. The Recently Viewed will show you what records you've just viewed. This is very important to show you what records you're working on. Please note that the records are viewed only the last ten views.



To make the records display in Recently Viewed:

1. go to Main
2. click one object
3. click records
4. go back to Main
5. click Recently Viewed
6. you will see the last viewed records

Figure 72-Recently Viewed Figure 73-Rec

Other

For any feedback please contact: Daniel.jordan@fellow-consulting.de