



QuickCRM Mobile

Mobile Access to SugarCRM

User Manual

Version: 2.6

I Introduction

QuickCRM Mobile gives you access to your CRM data on your smartphone.

QuickCRM Mobile comes in two editions:

- QuickCRM Mobile CE (GPLv3)
- QuickCRM Mobile Pro (Commercial License)

Once QuickCRM Mobile is installed on your SugarCRM server, you can access the mobile version from native apps or from your device browser.

Buttons and menus are available in English, German, Italian, Spanish and French.

All languages are supported for fields and values display.

For more information about QuickCRM Mobile Pro:

Visit www.quickcrm.fr/mobile or contact us at quickcrm@ns-team.fr

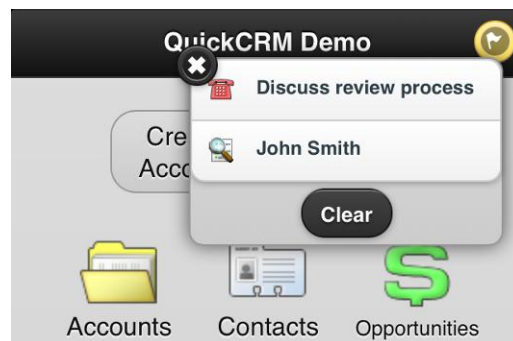
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II Release Note

Version 2.6

- Alerts for new assignments or modifications of own data made by other users (Pro Version and Native apps)



- Improved flexibility for customization of mobile views
- Bug fixes

III Installation

Admin users of SugarCRM can install QuickCRM Mobile using Module Loader. The mobile access is located in the "mobile" directory of your CRM installation. Please make sure this directory is writable before installation.

NOTE: Due to SugarCRM restrictions, Export rights must be enabled to access CRM data in SugarCRM 6.0 and 6.1.

QuickCRM Mobile Pro

When you install QuickCRM Mobile Pro for the first time, you need to select users authorized to access QuickCRM Mobile. Go to the admin page and click on Users in the QuickCRM Mobile section:

QuickCRM Mobile Pro			
Select Modules	Select Modules for Mobile availability	Configuration of QuickCRM Mobile	Definition of visible modules and fields
QuickCRM Update	Repair fields definition	Users	Selection of mobile users

Select the users by moving them to the "Mobile Users" table:

Drag and Drop a user name to authorize mobile access

Users	Mobile Users
Administrator	Jim Brennan
Will Westin	Sarah Smith
	Sally Bronsen
	Max Jensen
	Chris Olliver

Then click "Save".

IV Modules Management (QuickCRM Mobile Pro)

QuickCRM Mobile Pro

Select Modules	Select Modules for Mobile availability	Configuration of QuickCRM Mobile	Definition of visible modules and fields
QuickCRM Update	Repair fields definition	Users	Selection of mobile users

Go to the admin page and click on "Select Modules".

Save [Alt+S] Cancel [Alt+X]

Displayed Tabs	Hidden Tabs
Accounts	Bug Tracker
Contacts	Campaigns
Opportunities	Projects
Leads	Targets
Calls	Project Tasks
Meetings	
Tasks	
Notes	
Cases	
Expenses	

Drag and Drop the modules (including Custom Modules) that you want displayed or hidden on the mobile, then click on Save.

You can also order the displayed modules to define the order of icons on the mobile Home Page.

V Fields Management (QuickCRM Mobile Pro)

With QuickCRM Mobile Pro, very few fields are displayed by default on the mobile.

Before using the software, you should define which fields you want to display for each module, or use as search fields.

QuickCRM Mobile Pro

Select Modules	Select Modules for Mobile availability	Configuration of QuickCRM Mobile	Definition of visible modules and fields
QuickCRM Update	Repair fields definition	Users	Selection of mobile users

Go to the admin page and click on "Configuration of QuickCRM Mobile". Select a module, then click on Displayed fields, Search Fields or Displayed subpanels.

Accounts - Displayed fields

Save Cancel

Available	Hidden
Office Phone:	Alternate Phone:
Fax:	Annual Revenue:
Website:	Assigned to:
Email Address:	Employees:
Description:	Industry:
Billing Address:	Member of:
Type:	Ownership:
	Rating:
	SIC Code:
	Shipping Address:

You can select for each module which fields will be displayed (including custom fields) and the order of those fields.

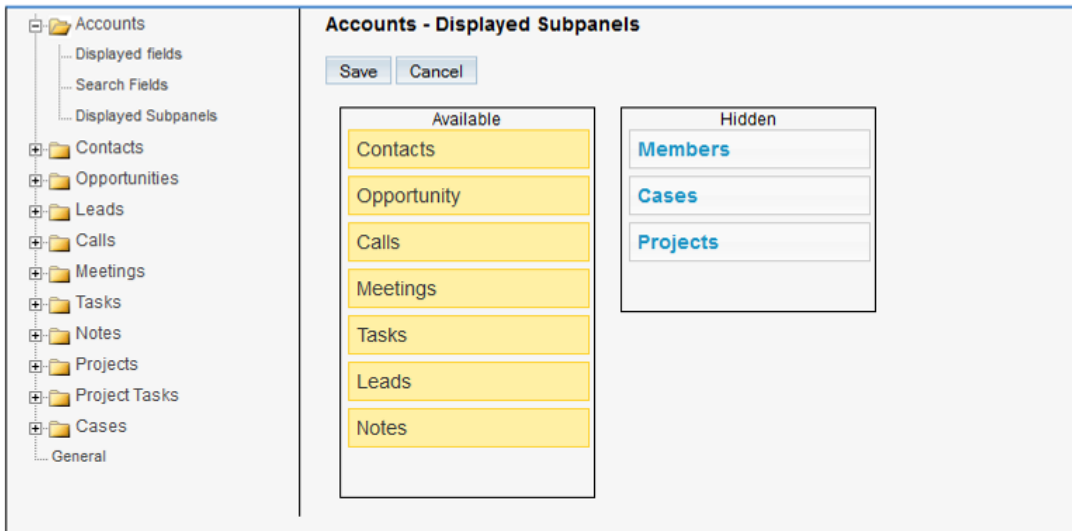
You must click on "Save" before customizing another module or another view.

Accounts - Search Fields

Save Cancel

Available	Hidden
Industry:	Alternate Phone:
Type:	Annual Revenue:
	Assigned to:
	Billing City:
	Billing Country:
	Billing Postal Code:
	Billing State:
	Billing Street:
	Date Created:


Drag and Drop the fields to be used as additional search criteria, then Save.

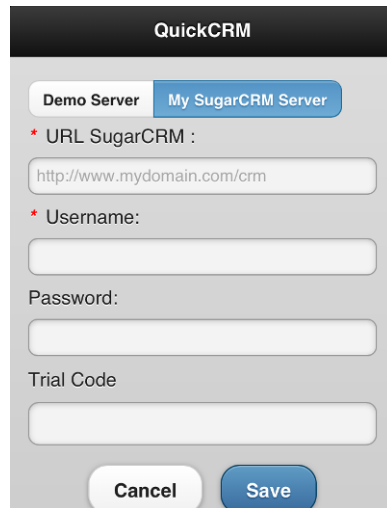


For each module, you can define and order the subpanels displayed on the detail view.

VI Using QuickCRM Mobile

VI.1 SugarCRM Configuration (iOS and Android apps)

On the Home Page, tap on  at the bottom right.



QuickCRM

Demo Server My SugarCRM Server

* URL SugarCRM :

http://www.mydomain.com/crm

* Username:

Password:

Trial Code

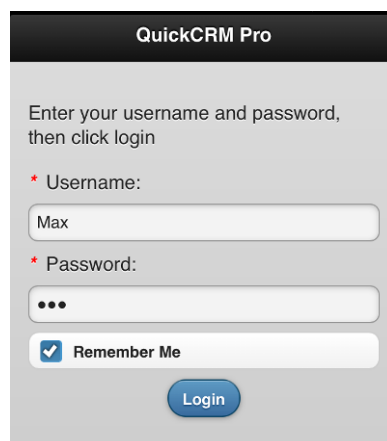
Cancel Save

Choose "My SugarCRM Server" then enter your SugarCRM URL, your username and your password.

If you have requested a trial version of QuickCRM Mobile Pro, enter the code you have received in "Trial Code". Tap on Save.

VI.2 Login (Web version)

Open your browser and connect to <http://your-sugarcrm-server/mobile> or <https://your-sugarcrm-server/mobile> depending on your configuration



QuickCRM Pro

Enter your username and password,
then click login

* Username:

Max

* Password:

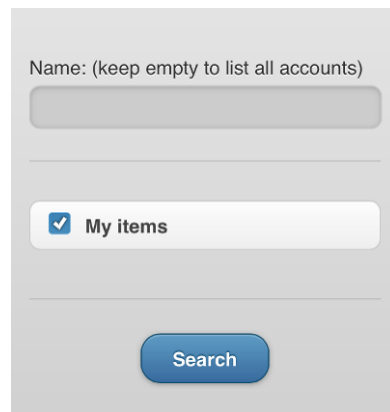
...

Remember Me

Login

Enter your SugarCRM login and password, and then click on Login. If you check "Remember Me", you will not be asked your user name and password next time you access QuickCRM.

VI.3 Search CRM Data



Name: (keep empty to list all accounts)

My items

Search

You can search Accounts, Contacts, Leads, Opportunities or Tasks with

- Name
- "My items"
- Other standard or custom fields (Pro version only).

For date fields, you can search From a date, To a date, between dates, today, this week, this month, etc.

Searching automatically extends your search keyword with wildcards, so you just need to type a few letters to search data.

Example:

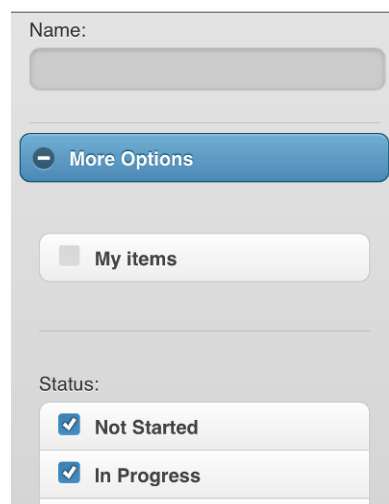
- Searching for *ban* might return
 - o Bank of America
 - o Union Francaise de banque

Search on Contacts looks for your keyword in First Name and Last Name.

Activating "My items" restricts search to data assigned to you.

Search fields can be extended with other standard or custom fields (see Field Management).

When searching for Tasks or Opportunities, the More Options button (Pro Version) you could, for example, search by Task status or Opportunity Sales stage:



Name:

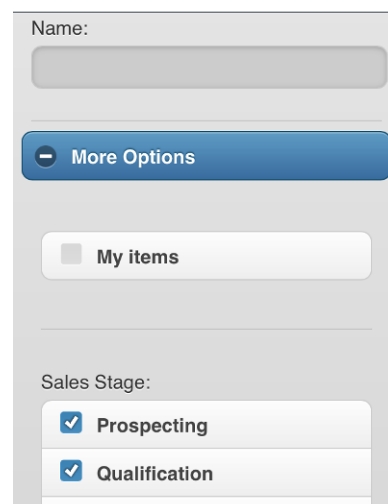
More Options

My items

Status:

Not Started

In Progress



Name:

More Options

My items

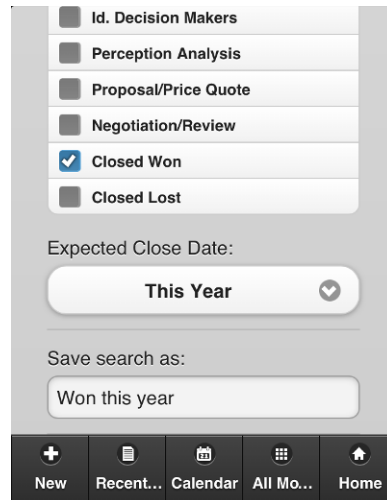
Sales Stage:

Prospecting

Qualification

Saved Searches (Pro Version)

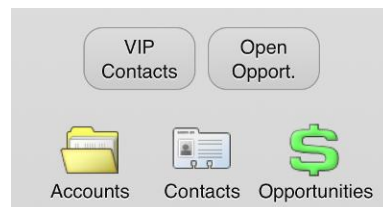
Users can save their favorite searches on their mobile:



For example, you can create a search named "Won this year" where you select Opportunities in Closed Won sales stage and Expected Close Date This year. The search will be saved when you click on Search.

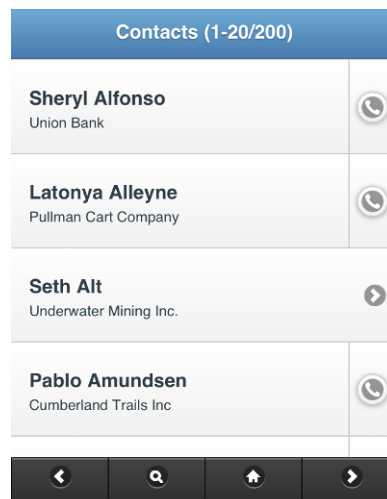
A dropdown menu will be available with saved search for that module.

If you click on "Mark as Favorite" on a saved search, this search will be directly accessible on your home page:




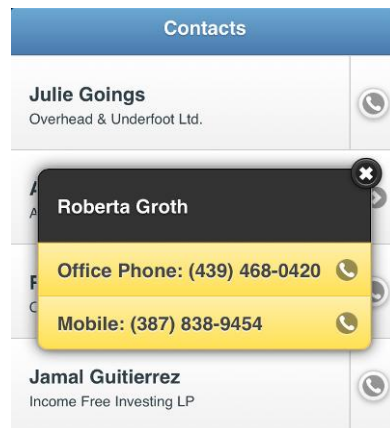
Lists

When clicking on Search, you get the list of records matching your search filter:

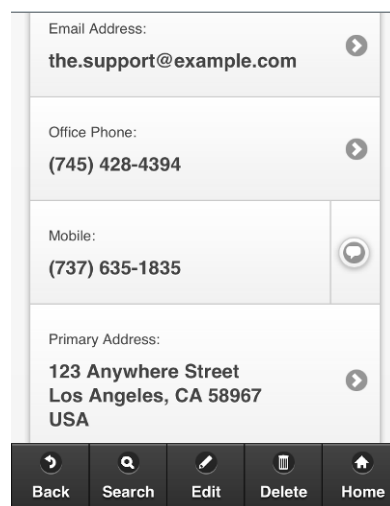


Number of items found and current page information (ex: 1-20/200) are displayed with SugarCRM 6.2 and later.


In this list, records containing phone numbers are displayed with a  icon (Pro version). You can then directly place calls to one of these phone numbers by clicking on that icon:



The detail view is displayed when you click on a line in the search results.



If you click on a phone number, a call will be placed to that phone number. If you have selected "Log Calls" on the Options page, a call will be created in SugarCRM (Pro version).

For mobile phone numbers, an SMS will be initialized if you click on the  button.

When clicking on an address, a map is displayed.

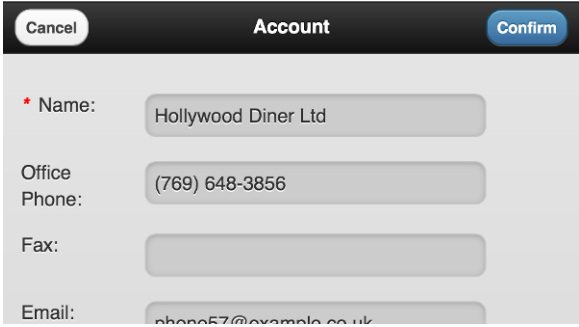
If you click on an email address, an email is prepared for that contact, lead or account.

VI.4 Create or edit Data (QuickCRM Pro)

Edition

To edit existing data (Account, Contact, Opportunity, etc.), find this element, then click on the Edit button.

A form is then opened allowing you to update existing data:



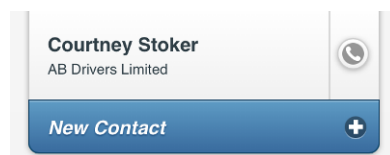
Click Confirm to save your modifications.

If your access rights do not allow you edition on these data, you will get an "Access Denied" error message.

Creation

Records can be created from Search Pages, List Pages or All Module page. You can also create records from subpanels:

For example, a Contact can also be created from the detail view of its account.



When creating a contact from an account, the link with the account will be automatically set, avoiding you searching for the account.

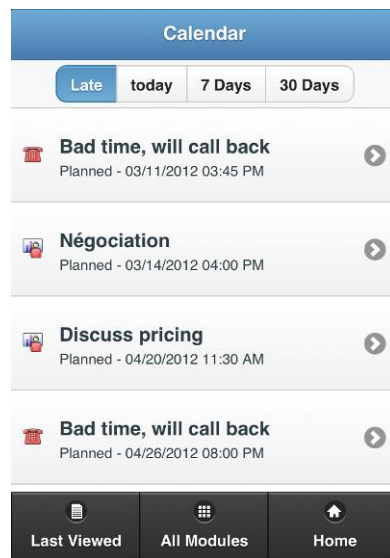
The address and phone number will be automatically copied from the account.

Notes

Depending on your device and OS version, you will be able to upload attachments to notes. On most devices, that would be limited to images.

VI.5 Calendar (QuickCRM Mobile Pro)

The Calendar button gives you a quick access to your calls and meetings



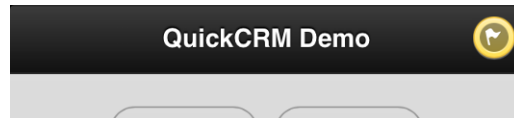
- Today : Calls and Meetings planned today
- 7 Days : Calls and Meeting planned in the next 7 days (including today)
- 30 Days : Calls and Meeting planned in the next 30 days (including today)
- Late : Calls and Meeting planned in the past and still not held

VI.6 Alerts

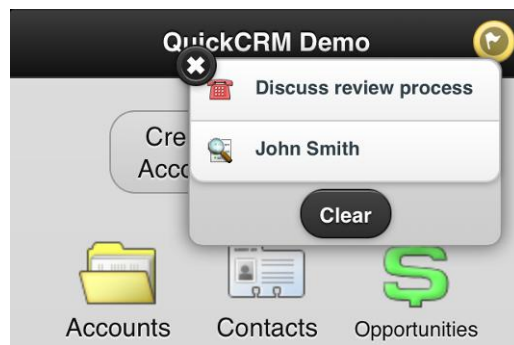
Alerts are available in the native apps for iOS and Android (CE and Pro Version) and in the "web app" (Pro Version only).

These alerts will be displayed if another user assigns data to you or modifies your own data.

New alerts are available when a yellow flag appears on the top right of the Home screen.



Tap on the flag to display the alerts list.




Tap on any item in the list to view this item.
Tap on Clear to clear the alerts list.

Alerts can be turned on/off on the Options page. They are turned on by default in the native apps.

Only Contacts, Leads, Calls and Meetings are supported.

VI.7 Options

From the Home Page on your handset, click on Options 

General options

QuickCRM Mobile toolbar can be displayed with or without labels.



Toolbar:

Labels

Rows Per Page

20

Subpanels

Hide when empty

Toolbar Labels:

Hide or display labels in the toolbar icons

Rows Per Page:

Number of items displayed when searching items.

Subpanels:

Subpanels can be hidden when no data are available in that subpanel.

Home Page

CE Version

Home

Accounts

Contacts

Opportunities

Leads

Calls

Meetings

Tasks

Expenses

Notes

Cases

With these options, you can select which icons will be displayed on the home page. All available modules will still be accessible from the All Modules page.

Pro Version

Home

Accounts

Search Create

Contacts

Search Create

Opportunities

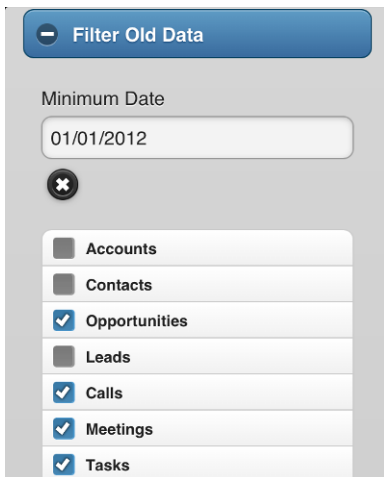
Search Create

Leads

Search Create

When Search is selected, the icon will be displayed on the home page. A Create button will be displayed on the home page if Create is selected.

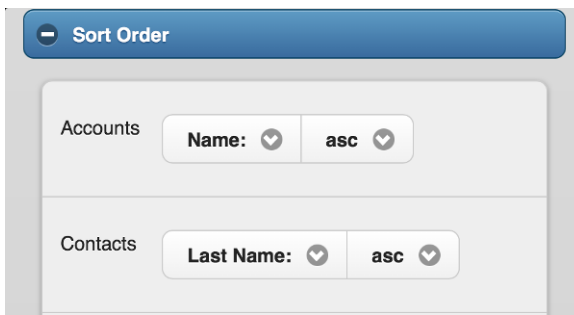
Filter Old Data



The "Filter Old Data" option allows you to hide all data created before a chosen date from all lists and subpanels.

Usually you will want to keep all accounts and contacts, but you could hide all opportunities, calls and meeting created before a certain date.

Sort Order



With the sort order options, you can define how the lists will be ordered.

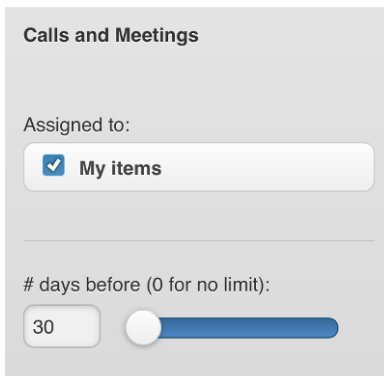
Calls and Meetings (Pro Version)



Log Calls :

Create a Call in SugarCRM when placing a call.

Several options are available to limit the quantity of displayed data in the calls and meetings subpanels of Accounts, Contacts, Leads or Opportunities.



My Items :

Displays only Calls and Meetings assigned to me

days before

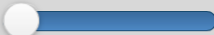
Do not display Calls and Meetings dated before that number of days

days after

Do not display Calls and Meetings dated after that number of days

By default, only Calls and Meeting between now - 30 days and now + 30 days are displayed.

days after (0 for no limit):

30 

Status:

- Planned
- Held
- Not Held

Status

Display Calls and Meetings depending on their status

VII Advanced customization

Users familiar with HTML and Javascript can extend QuickCRM Mobile appearance and behavior.

Home Page customization

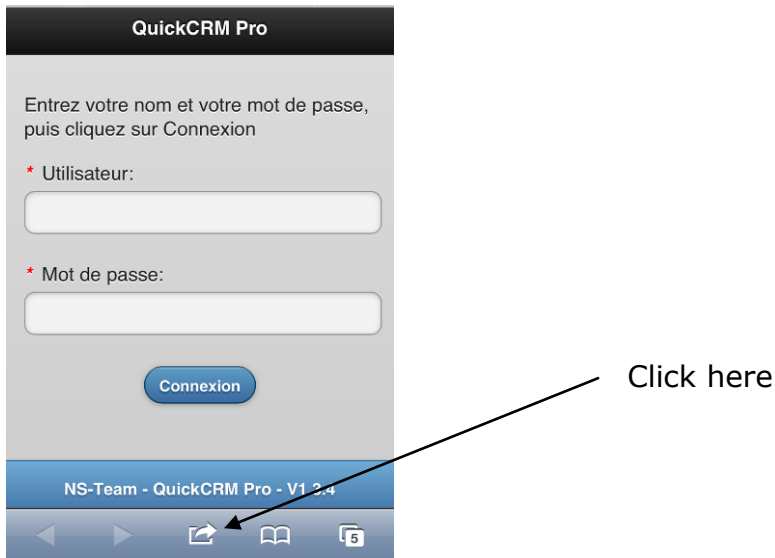
You can add your specific images or links on the mobile Home Page by creating an html file at custom/QuickCRM/home.html. This html file will be placed on top of the icons.

Javascript customization

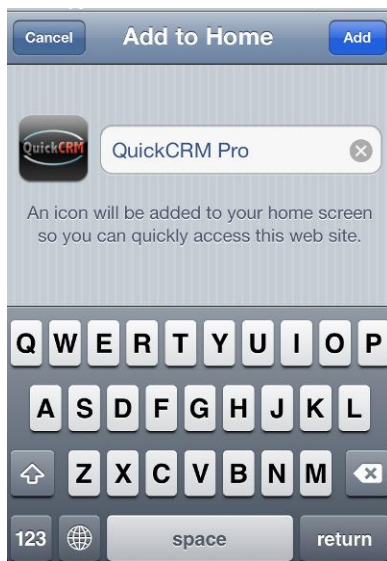
You add your specific functions by creating a javascript file at custom/QuickCRM/custom.js.

VIII Adding QuickCRM icon to your screen

On iPhone: open your browser and go to QuickCRM mobile Login URL



Click on Add to Home Screen,



Then click on Add.

On other phones, please consult your phone's user manual to create an icon.