



SageCRM

SageCRM 6.1

Wireless Mobile Guide

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Chapter 1

Introduction

This guide is for Users and System Administrators.

Please note that while the document refers to Sage CRM, CRM, or the CRM system throughout, all functionality covered is also relevant to SageCRM, SageCRM for Sage Accpac and Softline Accpac CRM.

We assume that:

- Users operate PDA devices, BlackBerry phones or WAP-enabled mobile phones. Familiarity with using Sage CRM over a standard Web browser would also be helpful, although not essential.
- System Administrators are fully conversant with the *User Guide* and *System Administrator Guide*.

Introduction

Sage CRM's Wireless Mobile solution allows you to work online with CRM from a mobile device, such as a BlackBerry Pearl, a PDA (Personal Digital Assistant), or a WAP-enabled mobile phone.



BlackBerry Pearl



PDA



WAP Phone

BlackBerry Pearl. To work online with a BlackBerry, it must be a Model 8100 which is capable of connecting to the Internet.

PDA. To work online with a PDA, it must be capable of connecting to the company's CRM system via the Internet or LAN.

WAP Mobile Phone. To work online with a mobile phone, it needs to be enabled for WAP and configured to connect to the company's CRM system through a WAP gateway.

WAP gateways make it possible for WAP devices to communicate with Web servers (for example, the server on which CRM resides). Most mobile phone operators provide a WAP gateway service. Once you have secured access to a WAP gateway, contact the operator for instructions on how to set up the mobile phones to use the gateway. You then need to provide users with information on how to set up their phones.

If a firewall has been installed at the implementation site, you need to take steps to ensure that traffic directed to the CRM server via the WAP gateway gets through. If the server is configured to allow access from all HTTP traffic (that is, if port 80 is open) WAP traffic can access the CRM server. For further information on server security refer to the "Security Overview" chapter in the *System Administrator Guide*.

Chapter Summary

The table below gives a summary of each chapter.

Chapter	Summary
Getting Started	Outlines the steps that users and system administrators need to take in order to access CRM from mobile device.
Working with CRM from a Mobile Device	How to work with CRM from a BlackBerry or a PDA.
Working with CRM from a WAP Mobile Phone	How to work with CRM from a WAP-enabled mobile phone.

Chapter 2

Getting Started

In this chapter you will learn about:

- Mobile devices supported by CRM.
- URLs for accessing CRM.
- Making devices known to CRM.
- Customizing Wireless Mobile screens.

Prerequisites

To use CRM's Wireless Mobile solution, you need:

- CRM installed on a server with a valid Wireless Mobile license key.
- Mobile devices for users.
- To have enabled users for mobile access.
- Connectivity from the mobile devices to your corporate network, the Internet, or WAP gateway (see "Introduction" in Chapter 1).
- URLs set up by the Network Administrator for access to the CRM system from inside and outside your corporate network.
- To make the different mobile device types known to your CRM system.
- To consider customizations to be made to such areas as screens, lists, tabs, and the Dashboard for improved viewing on mobile devices.

Mobile Devices

In addition to all WAP-enabled mobile phones, CRM's Wireless Mobile solution supports the following PDA devices and mobile phones:

Device	Example
BlackBerry	BlackBerry Pearl Model 8100
Pocket PC	HP iPAQ
Other	Any other mobile device with a browser that supports WML 1.1

Enabling Users

All users who want to access CRM from a mobile device need to be enabled to do so.

To enable a user for mobile:

1. Select Administration | Users | Users.
2. Select the hyperlink of the user you want to enable, and select the Change action button.
3. Ensure that the PDA/WAP Access field has been set to True.
4. Select Save.

URLs for Accessing CRM

Your Network Administrator needs to set up URLs for all mobile users so that they can access Mobile online from inside or outside the corporate network.

The URL for accessing CRM from inside the corporate network is the same as the URL for accessing CRM from your desktop and is typically in the following format:

`http://yourserver/yourapp`

The URL for accessing CRM from outside the corporate network typically includes your company's IP address. The URL is normally in the following format:

`http://companyipaddress/yourserver/yourapp`

Making Devices Known to CRM

Setting Up New Devices

It is unlikely that you will need to set up any new devices, as most of them are set up in CRM by default.

When Wireless Mobile is installed, a number of mobile device types are set up by default. The default devices should be sufficient for the range of mobile devices that you will use to access CRM. However, you can specify additional devices if required. When you add a new device it is recommended that you base it on one of the previously set up devices. Otherwise, you will need to set up a folder with device-specific images for CRM to use.

To set up a new device:

1. Click on Administration | Advanced Customization and select Devices from Advanced Customization Home page.

A list of default devices is displayed.

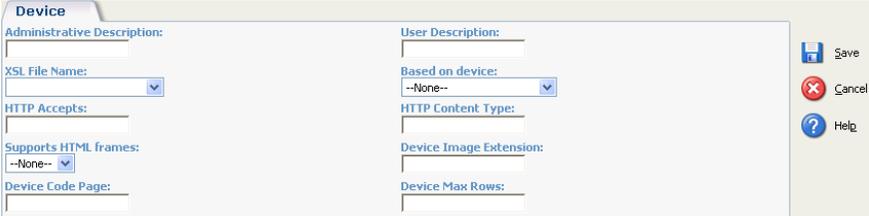


Administrative Description	User Description
Large Display WML (WAP)	WAP Phone with large screen
Monochrome Pocket HTML	PocketPC (iPag etc...) with black and white screen
Pocket HTML	PocketPC (iPag etc...) with color screen
Small Display WML (WAP)	WAP Phone with small screen

Devices list

2. Click the New Device button.

The Device input form is displayed.



Device input form

3. Type a description of the device you want to set up in the Administrative Description field.
4. Enter a description of the device for the end user in the User Description field.

5. Select the XSL transformation file your device requires from the XSL File Name list.
6. Select an alternative device from the Based On Device list if the device you are setting up is not included on the Devices list in Administration | Customization | <Entity> | Screens.
7. If your device uses a unique markup language to send information to CRM, type the language name in the HTTP Accepts field.
8. In the HTTP Content Type field, type the language that CRM will use to reply to the device.
9. Select Yes or No from the Supports HTML frames drop-down list to specify whether or not the device supports frames.
10. When you click the Save button, the new device is displayed in the list of devices.

The table below explains the standard fields on the Device input form.

Field	Description
Administrative Description	The description the administrator uses for the device being set up.
User Description	The description of the device that the end user sees in CRM. This description should make it clear to the user what type of device is being referred to.
XSL File Name	The name of the Extensible Stylesheet Language (XSL) transformation file required to convert CRM output to a format that the mobile device can understand.
Based On Device	If the device you are specifying is not listed in the Devices list in Administration Customization <Entity> Screens, you can select an alternative device from the Based On Device drop-down list.
HTTP Accepts	You only need to complete this field if the device you are specifying uses a unique markup language – for example, WAP uses WML. When you specify a markup language, the device sends a string to CRM to tell it which

Field	Description
	type of markup language it uses.
HTTP Content Type	This is similar to the HTTP Accepts field. Specifying a markup language in this field ensures that when CRM sends back a reply to the device, it tells it which markup language it is sending.
Supports HTML Frames	Specify whether or not the device you are setting up supports HTML frames.
Device Image Extension	Specify the image extension (.jpg, .gif, .png, etc) to be used with the device.
Device Code Page	Specify the character set. For example, shiftjs or utf8.
Device Max Rows	Specify the maximum number of rows that can appear in a grid.

Mapping User Agents

CRM typically maps user agents automatically. It is unlikely that you will need to map them yourself.

Every mobile device has a user agent, which describes the device to CRM. You only need to map a user agent to a device if the device is not already known to the CRM system. If you do not map a user agent to the device, CRM determines which user agent the device uses and maps it automatically.

To map a user agent to a device:

1. From Administration | Advanced Customization | Devices, select a device from the list of devices by clicking on its hypertext link.



Devices list

The Device input form is displayed.

Device Input form

2. Type a user agent in the Type A New User Agent field.

User Agent field

3. Click the Add button.

The user agent is mapped to the device.

Mapping Unassigned User Agents

There may be some user agents specified in CRM that have not yet been mapped to devices.

To map an unassigned user agent:

1. From Administration | Advanced Customization | Devices, select the View Unassigned User Agents button.

The Unassigned User Agents page is displayed.

Unassigned User Agents

2. Click on the user agent and the device you want to map it to.
3. Select the Save button.

The unassigned user agent is now mapped to a device.

Wireless Mobile Screen Customization

Customizing Mobile Screens

Note: This section describes how to customize mobile screens for a PDA or BlackBerry. It does not apply to WAP screens. WAP screen customization is described in the "Customizing WAP Screens" section later in this chapter.

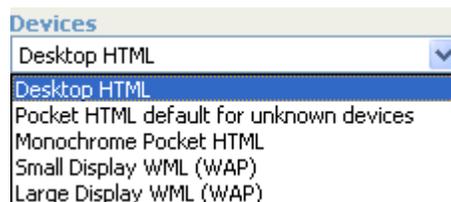
A typical CRM installation includes default user interfaces for different types of mobile devices. However, you may want to further customize some areas. You should carefully consider the way in which you do this. The VDU on a mobile device is many times smaller than a standard monitor, so it is important that the user interface is optimized for the smaller screen size. For example, if you add too many fields to a BlackBerry or PDA screen, it will look crowded and will be difficult for the user to work with.

The areas that can be customized for mobile are:

- Screens
- Lists
- Tabs

You customize mobile screens, lists, and tabs in the same way as you customize screens, lists, and tabs in CRM. However one additional step is required:

- Before you begin customizing Screens, Lists, or Tabs, you need to select the correct device type from the devices list. This list is displayed on the Screens, Lists, and Tabs pages in Administration | Customization | <Entity>.



Devices list

For more detailed information on screen, list, and tab customization, please refer to the *System Administrator Guide*.

Customizing Dashboards for Mobile

You can modify Dashboards for mobile users. For example, you may decide to limit the content available to mobile users, and you may want to configure a

default Dashboard screen for them. You specify that a Dashboard is available to mobile users by selecting the Set As Mobile checkbox on the Dashboard Details screen, and you can then create or modify the Dashboard in the usual way. For more information on setting up Dashboards for users, please refer to the *System Administrator Guide*.

As well as creating Dashboards for mobile devices, you can specify which blocks are to be made available to mobile users on their Dashboards.

To enable/disable the availability of a block to mobile:

Note: The Extensibility Module is required for block customization.

1. Select Administration | Customization | <Entity> | Blocks, and open the Maintain Block Definition page for the dashboard block you want to enable or disable for mobile users.
2. Select or uncheck the Available To Mobile checkbox and click the Save button.

Customizing WAP Screens

The way in which you access WAP screens and lists (in order to customize them) is different from the way you customize screens for other mobile devices.

There are a number of screens and lists in Administration | Customization | <Entity> that are specific to WAP. Their names are all prefixed with "WAP".

You customize WAP screens and lists in the exact same way as you would a standard "desktop" screen or list. In addition, you need to ensure that the screen or list is definitely a WAP screen, that is, if the name is prefixed by "WAP".

The following WAP screens and lists are available in CRM:

- WAP Company Box Long
- WAP Company Box Short
- WAP Company Search Box
- WAP Company Grid
- WAP Person Box Long
- WAP Person Search Box
- WAP Person Grid
- WAP Person List
- WAP Address Box
- WAP Communication Search Box

- WAP Communication Box Long
- WAP Communication Summary
- WAP Communication Email Box
- WAP Communication Status Box
- WAP Communication List
- WAP Communication To Do List
- WAP Opportunity Search Box
- WAP Opportunity Summary
- WAP Opportunity Grid
- WAP Opportunity Detail Box
- WAP Case Search Box
- WAP Case Summary
- WAP Case Detail Box
- WAP Case Grid
- WAP Case Progress Box

Now you can...

- List the mobile devices supported by CRM.
- Get URLs for accessing CRM.
- Make devices known to CRM.
- Customize Wireless Mobile screens.

Chapter 3

Working with CRM from a Mobile Device

In this chapter you will learn about:

- Example mobile devices.
- Logging on and logging off.
- Basic screen elements.
- Searching for information.
- Adding customer information.
- Managing your calendar.
- Managing leads, opportunities, and cases.
- Viewing reports.
- Selecting a Dashboard for your mobile device.
- Synchronizing with Microsoft Outlook.

Introduction

This chapter describes how to navigate CRM using a mobile device such as a PDA or a BlackBerry. WAP-enabled mobile phones are covered in "Chapter 4 Working with CRM from a WAP Phone"

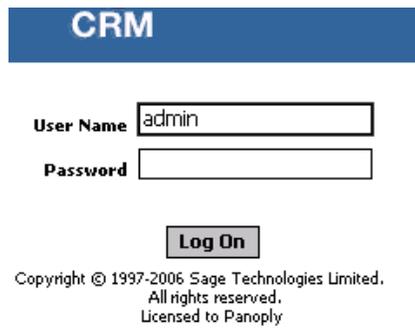
Logging On

You can reach the Logon page in this way:

1. Open your Web browser and enter the URL given to you by your system administrator. If you already access CRM from your desktop, type in the URL you normally use. This usually looks like this:

`http://yourserver/yourapp`

The Logon page is displayed:

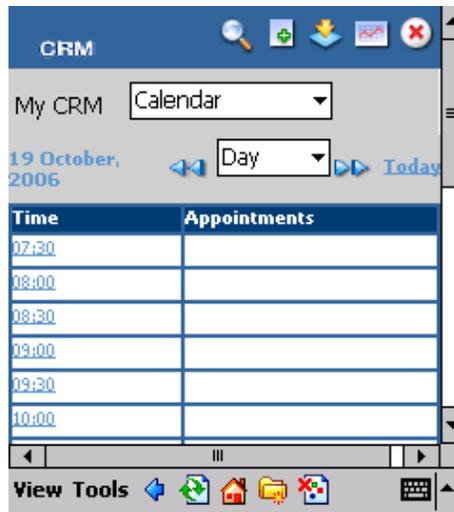


The image shows the CRM login page. At the top is a blue header with the text "CRM". Below this are two input fields: "User Name" with the text "admin" and "Password" which is empty. A "Log On" button is centered below the fields. At the bottom, there is a copyright notice: "Copyright © 1997-2006 Sage Technologies Limited. All rights reserved. Licensed to Panoply".

CRM Logon page

2. Enter your User Name and Password and click the Log On button.

You are logged on. By default, a successful logon displays the My CRM Calendar for today.



CRM Calendar

Logging Off



To log off:

1. Select the Log Off main menu button at the top of the screen.

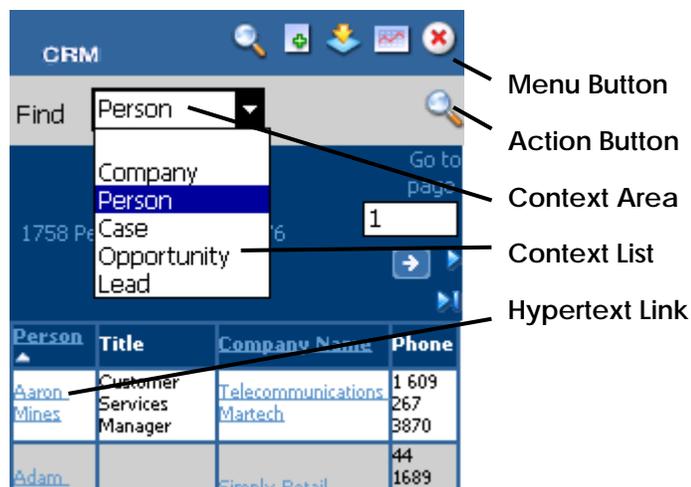
You are also automatically logged off if you close the browser window or navigate to another site within the same browser window.

Moving Around

To effectively move around a CRM system using a mobile device, you need to be aware of the different areas of the screen.

The Basic Screen Elements

This section explains the different areas of a Wireless Mobile screen.



Menu Buttons. You can move directly from one work area to another using the Menu Buttons at the top of the screen. Menu Buttons remain the same regardless of the context you are working in.

Action Buttons. As you work with the system you will need to change the data. For example, update contact information, progress sales opportunities, and so on. Action Buttons enable you to do this. The Action Buttons available to you change depending on what context you are in.

Hypertext Links. You can jump from one page to another using Hypertext links. For example, when you click on a person's name, the Summary page associated with that person is displayed.

Context List. These options help you move quickly from one context to another during the course of your work. For example, when you are reviewing your Calendar you may want to quickly switch to your pending opportunities or cases. The Context List allows you to do this.

Context Area. This area of the screen contains the Context List and Action Buttons.

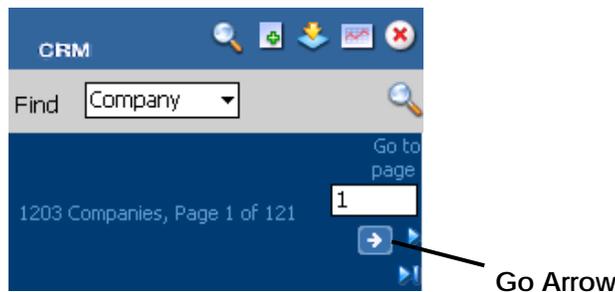
Finding Information

This section explains how to perform a basic search and gives some examples of how to find specific information.

To find information:



1. Click on the Find menu button.
2. Select the item you want to search for from the context list. Options available are Company, Person, Case, Opportunity, and Lead.
3. Type in one or more search criteria if you want to.
4. Click on the Find action button to start the search.
5. Click on any one of the hyperlinks to drill down on the customer information. If you get a long list of results that span over several pages, you can jump to the page number you want by entering the page number in the Go to page field and pressing the Go arrow.



Note: The Find menu button is at the top of the screen, the Find action button is in the context area of the screen.

Example: Finding a Person

To find a person called Bill Jones:

1. Click on the Find menu button, and select Person from the list in the context area.

The Person Search page is displayed.

2. Type **Bill** in the First field, and click the Find action button.

The screenshot shows a CRM application window with a search bar containing 'Person'. Below the search bar, it indicates '10 People, Page 1 of 1'. A table displays the search results with columns for Person, Title, Company Name, and Phone. The table contains six rows of data, each with a blue hyperlink for the person's name.

Person	Title	Company Name	Phone
Bill Clayton	Chief Accountant	Coast Nexus	1 847 249 8321
Bill Connelly	I.T. Director	Julius B.	1 609 267 1194
Bill Jones	Director	Advanced Human	1 606 344 2428
Bill Mills	IT Manager	Lake Inc.	1 713 856 3585
Bill Moss	CFO	Group & Lexco	1 703 379 4831

Search results

A list of people matching your search criteria is displayed.

3. Click on the hypertext link for Bill Jones.

The Person Summary page is displayed.

Example: Finding an Opportunity

To find an opportunity that is linked to a particular company:

1. Click on the Find menu button, and select Company from the list in the context area.
2. Type **Design Right** in the Company Name field and select the Find action button.
3. Click on the hypertext link of Design Right to display the Summary page.
4. Select Opportunities from the list in the context area.

A list of opportunities linked to Design Right is displayed.



The screenshot shows a CRM window titled "CRM" with a search bar containing "Opportunity". Below the search bar, it says "1 Opportunity, Page 1 of 1". A table with the following data is displayed:

Status	Description	Company Name	Stage
	50 Users plus consulting	Design Right Inc.	Negotiating

Opportunity linked to a Company

5. Click on the status icon to view the opportunity details.

Adding Customer Information

This section explains how to add customer information and gives an example of adding a new contact to an existing company.

To add information:



1. Click on the New button from the top of the screen.
2. Select the item you want to create from the context list. Options available are Company, Person, Individual, Case, Opportunity, Communication, and Lead.
3. Type the details in the input form.
4. Select the Save button from the context area.



Example: Adding a Person to a Company

To add a person to an existing company:

1. Find the company you want to add the new contact to.
2. When the Summary page for the company is displayed, select Person from the list in the context area.
3. Select the New button from the context area.

The screenshot shows a mobile application interface for a CRM system. At the top, there is a blue header with the text "CRM" and several icons: a magnifying glass, a green plus sign, a yellow arrow pointing down, a red envelope, and a red X. Below the header, there is a "Company" label followed by a dropdown menu. The selected company is "Design Right Inc.". Below this, there is a "Salutation:" label with a dropdown menu showing "--None--". Below that are several input fields for "First Name:", "Last Name:", "Title:", "Business E-mail:", and "Area Code:". At the bottom of the form, there is a navigation bar with a back arrow, a home icon, and a forward arrow.

Company – Add Person

4. Complete the person details and select the Save button in the context area.

Note: You can link opportunities, cases, leads, and communications to companies in the same way.

Doing Your Work

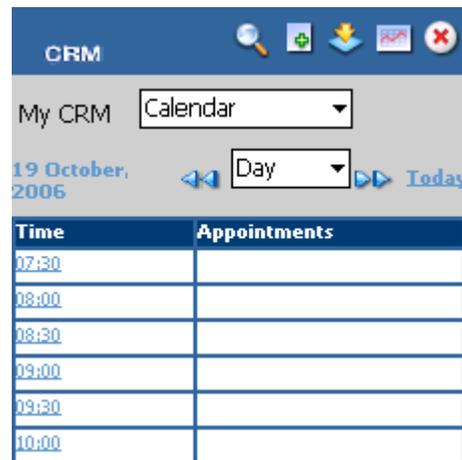
You can schedule tasks and appointments for yourself or for a colleague that are not linked to any particular entity. You can also create appointments and tasks that are linked to specific companies, people, opportunities, cases, and leads. This section provides an example of both and it provides an overview of how to manage your personal calendar.

Navigating Your Calendar

When you log onto CRM your daily Calendar is displayed. You can switch between daily, weekly, monthly, and yearly views of your Calendar using the list in the context area.



If you are not currently in the Calendar context, you can move to it by clicking the My CRM menu button at the top of the screen.



CRM Calendar

- Gray shading indicates the current time or date in the daily and weekly views, respectively.
- The daily and weekly views are divided into Appointments on the top half of the page and Tasks on the bottom half of the page (you need to scroll down to view tasks). Filter criteria apply to the calendar – if the Status field is set to Pending, you will only see pending tasks and appointments in your calendar.
- The Next and Previous arrows allow you to scroll to the next page of the view you are in.
- To create a new task within the daily view, select the New Task hyperlink. To create a new appointment:

- Select the time the appointment is due to take place.
- Then fill in the details.
- You need to scroll down to complete all the fields.
- You can assign it to a colleague by selecting their name from the User field.
- When you save it, the communication is saved in your (or your colleague's) My CRM work area.

CRM	
My CRM <input type="text"/>	
Action:	Meeting
Details:	Weekly Sales Meeting
Priority:	Normal
Status:	Pending
Date / Time:	19/10/2006 16:45
End Time:	19/10/2006 17:15
Reminder:	Don't remind me

New Appointment

- Clicking on a specific date on the weekly and monthly views takes you to the daily view for that day.
- Clicking a week in the monthly view takes you to the weekly view for that week.
- Clicking a month in the yearly view takes you to the monthly view for that month.
- You can create a communication that is linked to a person, company, opportunity, case, by:
 - Opening the summary page for the person.
 - Selecting Communication from the list in the context area.
 - Selecting the New action button.
 - When you fill in the details and save it, the communication is saved within the context of the company.

Managing Leads, Opportunities, and Cases

To create a new lead, opportunity, or case:



1. Click on the New menu button, and select Lead, Opportunity, or Case from the list in the context area.

A screenshot of a CRM application window titled 'CRM'. The window has a search icon, a plus icon, a download icon, a refresh icon, and a close icon in the title bar. Below the title bar is a dropdown menu labeled 'My CRM' with a list icon. The main form area contains several fields: 'Stage:' with a dropdown menu set to 'Lead'; 'Status:' with a dropdown menu set to 'In Progress'; 'Description:' with a text input field; 'Details:' with a text input field; 'Forecast Currency:' with a dropdown menu set to '\$'; 'Forecast:' with a text input field; and 'Confidence%' with a text input field.

Stage:	Lead
Status:	In Progress
Description:	
Details:	
Forecast Currency:	\$
Forecast:	
Confidence%	

New Opportunity



2. Type the details in the input form. You'll need to scroll down to complete all of the details
3. Select the Save action button from the context area.

Alternatively, you can find a specific person or company and link the lead, case, or opportunity to it.

To update an existing lead, opportunity, or case:



1. Find the lead, opportunity, or case and open the Summary page.

CRM	
Opportunity	Summary
In Progress	
Stage:	Lead
Status:	In Progress
Description:	June Website Offer Lead
Details:	uuu
Forecast:	\$ 10,000.00
Certainty%:	10
Priority:	Normal
Opened:	28/12/2007 15:55
Assigned To:	System Administrator
Team:	Direct Sales

Opportunity Summary page

2. Select the Edit action button from the context area.
3. Make the changes and select the Save action button from the context area.

Reporting

CRM includes sample reports in various categories, for example Sales and Customer Care. You can run the reports on your mobile device by selecting the Reports button.

Running a Report



To run a sample report:

1. Select the Reports button.
2. The Reports page is displayed.
3. Select a category from the Select Category list.

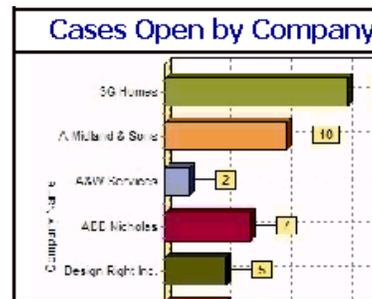
A list of reports available in that category is displayed.



Select Report page

- Click on the hypertext link of the report you want to run.

The report is displayed.



Cases Open By Company Report - Chart

You may need to scroll down to view the full report details.

Company Name	RefId	Assigned To	Description
5-3	Kylie Ward	Kylie Ward	Incorrect version number.
1-4	Kylie Ward	Kylie Ward	Will not load any of the software
1-7	Kylie Ward	Kylie Ward	Custom screen not using normal fonts.
5-10025	Kylie Ward	Kylie Ward	Server Crash during peak traffic

Cases Open By Company Report - Detail

Note: You can run any reports that you have created in CRM from your desktop on your mobile device. You run them in the same way as you run sample reports.

Dashboard

You can define the Dashboard you want displayed on your mobile device from your desktop.

To select a Dashboard for your mobile device:

1. From your desktop, open My CRM | Dashboard.
2. Select the Dashboard you wish to view on your mobile device from the Dashboard drop-down list.

The Dashboard Content page is displayed.

3. Click on the Edit Dashboard Details button.

The Dashboard Details page is displayed.

4. Select Set As Mobile Dashboard and then click on the Save button.

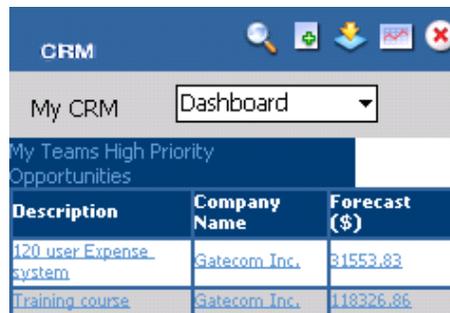
The Dashboard you have selected will be displayed when you view the Dashboard from your mobile device.

Please refer to the *User Guide* for more information on creating and adding content to dashboards.

To view a Dashboard from your mobile device:

1. Select the My CRM button if you are not already in the My CRM context.
2. Select Dashboard from the list in the context area.

Your preferred Dashboard is displayed.



The screenshot shows a mobile CRM interface. At the top, there is a blue header with the text 'CRM' and several icons (search, refresh, download, print, close). Below the header, there is a grey bar with 'My CRM' and a dropdown menu currently set to 'Dashboard'. Underneath, there is a blue bar with the text 'My Teams High Priority Opportunities'. The main content area displays a table with three columns: 'Description', 'Company Name', and 'Forecast (\$)'. The table contains two rows of data.

Description	Company Name	Forecast (\$)
120 user Expense system	Gatecom Inc.	31553.83
Training course	Gatecom Inc.	118326.86

Dashboard content

Synchronizing with Microsoft Outlook

You can synchronize Microsoft Outlook appointments, tasks, and contact information with CRM appointments, tasks, and contact information using your mobile device.

To do this:

1. Ensure that synchronization capabilities are set up between your desktop and PDA. (Refer to the documentation accompanying your PDA for details on how to synchronize with your desktop.)
2. Synchronize Pocket Outlook with your desktop version of Outlook to ensure that you are working with the most up-to-date contacts and appointments from your PDA.
3. Make changes to contacts, tasks, and appointments from your PDA in Pocket Outlook.
4. Synchronize Pocket Outlook with your desktop version of Outlook.
5. From CRM, synchronize Outlook on your desktop with your CRM contacts, tasks, and appointments.

Please refer to the "Working with MS Outlook" in the *User Guide* for more information on synchronizing CRM with Outlook.

Now you can...

- List example mobile devices.
- Log on and off.
- Explain basic screen elements.
- Search for information.
- Add customer information.
- Manage your calendar.
- Manage leads, opportunities, and cases.
- View reports.
- Select a Dashboard for your mobile device.
- Synchronize with Microsoft Outlook.

Chapter 4

Working with CRM from a WAP Mobile Phone

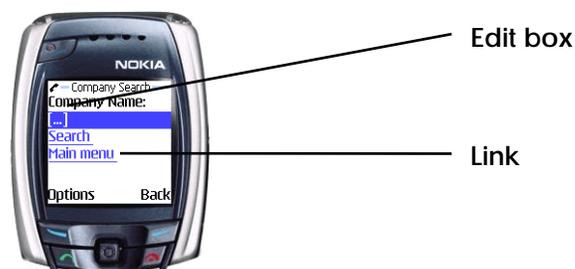
In this chapter you will learn about:

- Moving around and logging on.
- Finding contact information.
- Managing your Calendar.
- Finding and progressing a Sales Opportunity.
- Finding and progressing a case.

Moving Around

You must be familiar with the navigation elements on your WAP-enabled mobile phone before you can log onto and work with CRM. A Nokia 6800 mobile phone is used for illustration purposes in this document, but you can use any WAP-enabled mobile phone.

Basic Navigation Elements



Navigation Elements

- **Links.** Enable you to move from one page to the next.
- **Edit Boxes.** Enable you to enter text or select from a list of options. Edit boxes have square brackets around them.

Logging on

To log onto CRM from your WAP phone:

1. Enter the URL given to you by your Systems Administrator. This usually looks like this:

`http://yourserver/yourapp`

2. Bookmark the link.

The CRM Logon page is displayed.



CRM Logon page

3. Select the Logon edit box, and enter your Logon ID and press on the left hand button below OK.

When the CRM Logon page is displayed, enter your Password and click on the left hand button.

4. Scroll down and select the Logon link at the end of the page.

The CRM main menu is displayed.



CRM Main Menu

You can now start using CRM.

Note: You can be logged onto CRM on your mobile phone and your desktop simultaneously. This means you can enter data into CRM from your desktop and see it on your mobile phone, and you can progress data on your mobile phone and see it on your desktop, in real time.

Finding Contact Information

Once you have logged onto CRM from your phone, you can search for person and company contact information.

Searching for a Person

To look up a person's phone and address details:

1. Select the Person link from the Main Menu.
2. When the Person Search page is displayed, select the Last Name edit box.
3. Enter the first letter of the person's last name and select the Search link at the end of the page.

The Person Search result page is displayed, showing a list of all the people in CRM who match the search criteria.

4. Select the link of the person whose details you want to view.

The Person Summary page is displayed. If you scroll through the details, this page shows you address, phone, fax and e-mail information for the selected person.



Person Summary page – Address Details

5. Scrolling to the end of the page enables you to view opportunities, communications and cases for this contact or return to the Main Menu.



Person Summary – Return to Main Menu

Searching for a Company

The procedure for finding a company is similar to the procedure for finding a person.

To search for a company:

1. From the Main Menu, select the Company link.
2. When the Company Search page is displayed, select the Company Name edit box.

The Text input screen is displayed.

3. Enter the first letter of the company name and then select the Search link.

The Company Search result page is displayed, showing a list of all the companies in CRM that match the search criteria.

4. Select the link of the company whose details you want to view.
5. The Company Summary page is displayed. If you scroll through the details, this page shows you address, phone, fax and e-mail information for the selected company.



Company Summary page

Scrolling to the end of the page enables you to view opportunities, communications, cases, and related people for the company or return to the Main Menu.

Doing Your Work

You can keep track of your appointments and tasks in calendar or list mode.

Navigating your Communications List

To display your current list of tasks and appointments:

1. Select Communication from the Main Menu.

The Communication Search page is displayed.



Communication Search page

You can set View Mode to Day or Week, and you can set the Status to Pending, Complete, Cancelled or All. In addition, when you scroll down you can set Show Tasks to Appointments Only, Tasks Only, or All.

2. Once you have specified the search criteria, select the Search link.

A list of all your pending communications for today is displayed.



Pending Communications

3. To find the specific communication you want to view, scroll down the page.
4. You can also find more communications by selecting the Next Day/Week, Previous Day/Week or New Search links.
5. Once you have found the communication you want to view, select that communication's link to get more information on the specific task or meeting.

The Communication Summary page for the communication is displayed.

When you scroll down the page you can view the status, action (type), date/time, and details of the communication.

In addition, you can select:

- The Continue link to return to the list of Communications that were returned from your search.
- The Edit link to change the status of the Communication.
- The Main Menu link to return to the Main Menu.

Navigating your Calendar

To navigate to your Calendar:

1. Select Communications from the Main Menu.
2. From the Communication Search page, select the Calendar link.

A calendar displays for the current month, organized per week. If you have any tasks or appointments for a specific week, the calendar entry is prefixed by "(A)" for appointments or "(T)" for tasks.



CRM Calendar

3. Select a week in which you have appointments or tasks.

A list of days is displayed.

4. Select a day in which you have an appointment or task (A) or (T).

The communication list for that day is displayed.

Now you can select the link of the Communication you want to view and review the Communication Summary page in the usual way.

Changing the Status of a Communication

As well as viewing information on your tasks and appointments, you can update their status.

To change the status of a meeting from Pending to Complete:

1. Open the Communication Summary page.



Communication Summary page

2. Select Edit from end of the page.

The Communication Edit page is displayed.



Communication Edit page

3. Change the Status to Complete, and select Save.

The status of the communication is changed to Complete.

Finding and Progressing an Opportunity

There are a number of ways to find an opportunity, as follows:

- From the Company Summary page, select the Opportunity link to view a list of Opportunities associated with that company.
- From the Person summary page, select the Opportunity link to view a list of Opportunities associated with that person.
- From the Main Menu, select Opportunity, choose the search criteria you wish to apply, and select the Search link. A list of Opportunities that match the search criteria you specify is displayed.

Example: Closing a Sale

To search for an opportunity by finding the company to which it is linked:

1. Select Company from the Main Menu.
2. Type the company name in the edit box and select Search.
3. Select the company from the list of companies matching your search criteria.
4. Scroll to the end of the Company Summary page and select Opportunities.

A list of opportunities linked to the selected company is displayed.

5. Select the sales opportunity you have been working on.

The Opportunity Summary page is displayed.

6. Scroll down the Opportunity Summary page and select the Progress link.



Opportunity Summary – Progress Link

7. When the Oppo Progress screen displays, select Progress from the list of available actions.

From here you can you can change the values of the following: Stage, Status, Forecast, Certainty%, Assigned To, Channel, Priority, Close By, Sales Analysis. You can also add a tracking note if you wish.



Opportunity Progress

8. Change the Status to Won and the Stage to Sale Closed. Add a tracking note providing additional information, and click the Save link.

The sales opportunity is updated.

Finding and Progressing a Case

There are a number of ways to find a case, as follows:

- From the Company Summary page, select the Case link to view a list of cases associated with that company.
- From the Person Summary page, select the Case link to view a list of cases associated with that person.
- From the Main Menu, select Case, choose the search criteria you wish to apply and select the Search link. A list of cases that match the search criteria you specified is displayed.

Example: Progressing a Case

To progress a case:

1. Open the Case Summary page.
The Case Progress page is displayed.
2. Select the Progress link from the list of available actions.
3. Set the Stage to Investigating and the Problem Type to Faulty component.
4. Select the Save link.

Now you can...

- Move around and log on.
- Find contact information.
- Manage your calendar.
- Find and progress a Sales Opportunity.
- Find and progress a case.

