Sage CRM

7.0 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, regional products may use different brand names.

We assume that:

- Users operate Windows Mobile devices, BlackBerry Pearls, or other mobile devices with Web browsers. 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 using an IE Mobile browser on any device, such as the HP iPAQ or the Palm Treo. It is also possible to work online with CRM from other mobile devices with browsers, such as the BlackBerry Pearl. Users of such devices should note, however, that the Sage CRM user interface will differ from that seen when using an IE Mobile device.

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 Internet gets through. 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 a mobile device.
Working with CRM from a Mobile Device	How to work with CRM from an IE Mobile device or BlackBerry.

Chapter 2
Getting Started

In this chapter you will learn about:

- Enabling users for mobile access.
- 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.

  If you do not have valid license key, you will receive the message "Current CRM Installation is not licensed for mobile".
- Mobile devices for users.
- To have enabled users for mobile access.
- Connectivity from the mobile devices to your corporate network or the Internet (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 Classic Dashboard for improved viewing on mobile devices.

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 Mobile Device 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 Wireless 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/yourapp

Making Devices Known to CRM

A mobile device is a pocket-sized computing device typically having a display screen with touch input or a miniature keyboard, such as a mobile phone or PDA. A device in CRM can be for one or a group of actual mobile devices. CRM will recognize most devices and will present the appropriate user interface (either Desktop, Mobile or Mobile B&W).

Setting Up Additional Devices

When Wireless Mobile is installed, a number of mobile device types are set up by default. The default device list should be sufficient for the range of mobile devices that you will use to access CRM. However, you can set up additional devices if required by modifying one of the existing devices.

To modify an existing device:

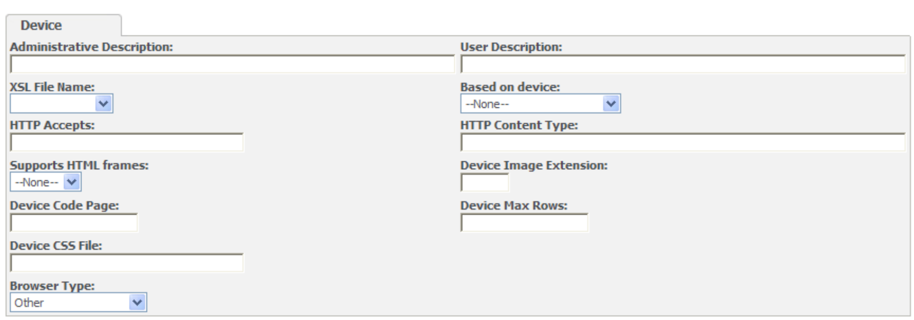
1. Click on Administration | Advanced Customization and select Devices from the Advanced Customization Home page.

   A list of default devices is displayed.

Devices list

2. Click on the hyperlink of the device you wish to modify.

   The Device input form is displayed.



Device Input form

3. Replace the description in the Administrative Description field with the description of the device you want to set up.
4. Replace the description in the User Description field with the description of the device that you want the end user to see.
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 modified 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. For each device, a set of files is created in a folder in the following location: ..\Program Files\Sage\CRM\<installname>\WWWRoot\Themes\XSL.
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.

Field	Description
HTTP Accepts	You only need to complete this field if the device you are specifying uses a unique markup language. When you specify a markup language other than HTML, the device sends a string to CRM to tell it which 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.
Device CSS File	The CSS file you want associated with the device.
Browser Type	The browser type supported by the device. Choose from HTML 4, Limited HTML, or Other. HTML 4 delivers the normal desktop UI to the device. If you are not sure what to set this to and want CRM to assign a browser type, select Other.

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 hyperlink.

   The Device input form is displayed.

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.

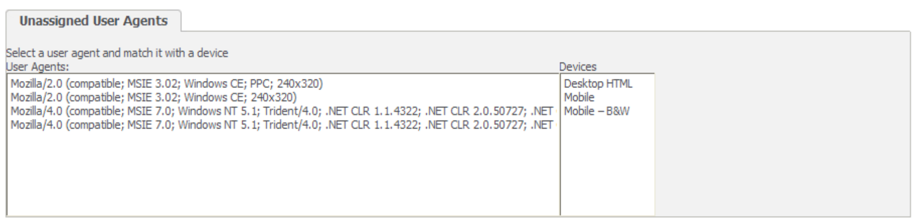
Mapping Unassigned User Agents

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.

Customizing Mobile Screens

A typical CRM installation includes default user interfaces for different types of mobile devices. However, you may want to further customize some areas.

An important consideration is that the user interface is optimized for the smaller screen size of many mobile devices. For example, if you add too many fields to a screen, it may 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>.
- The only supported actions on mobile are runtabgroup and runblock.

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

Customizing Classic Dashboards for Mobile

You can modify Classic 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 Classic Dashboard screen for them. You specify that a Classic 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 Classic Dashboard in the usual way.

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

Note: Interactive Dashboards are not supported on mobile devices.

For more information on setting up Classic and Interactive Dashboards for users, please refer to the *System Administrator Guide*.

Now you can...

- Enable users for mobile access.
- 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:

- 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 Classic Dashboard for your mobile device.
- Synchronizing with Microsoft Outlook.

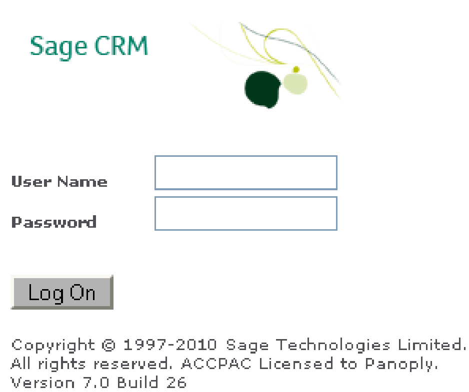
Logging On

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

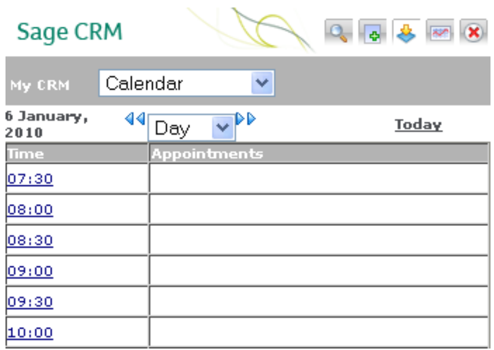
   The Logon page is displayed:



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 the current day.



CRM Calendar

Logging Off

To log off:

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

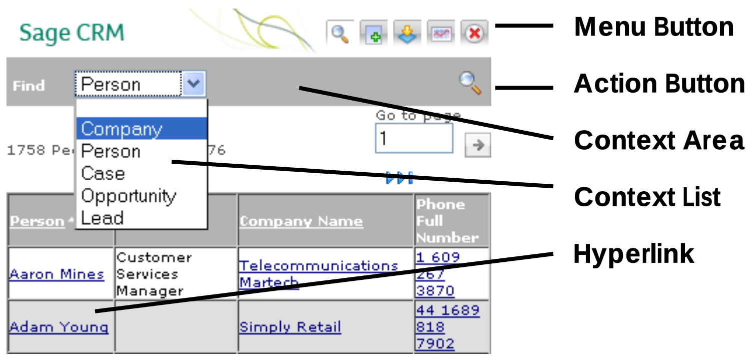
You are also automatically logged off if you close the browser window or navigate to another site within the same browser window.

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.



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.

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

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.

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

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.

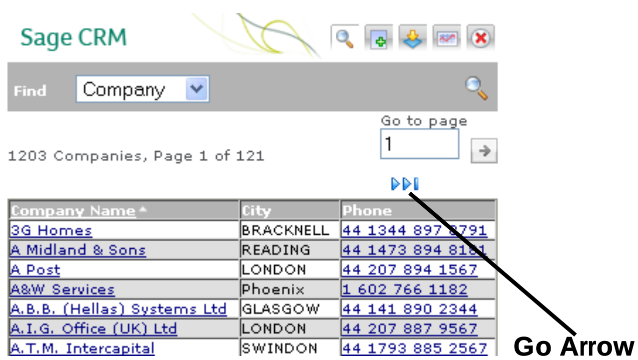
2. Select the item you want to search for from the context list. Options available are Company, Person, Case, Opportunity, and Lead.

   Note: Documents are not supported on mobile installs. Any documents associated with a Company, Person, Case, Opportunity, or Lead will not be visible to users accessing CRM on a mobile device.

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.

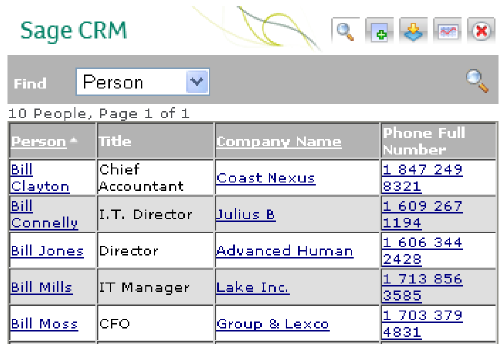
Example: Finding a Person

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.



Search results

A list of people matching your search criteria is displayed.

3. Click on the hyperlink 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 hyperlink 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.

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 menu button.
2. Select the item you want to create from the context list. Options available are Company, Individual, Case, Opportunity, Communication, and Lead.
3. Type the details in the input form.

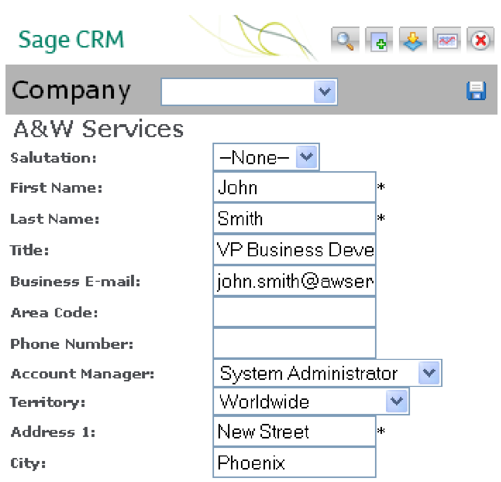
4. Select the Save button from the context area.

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 context list.
3. Select the New button from the context area.

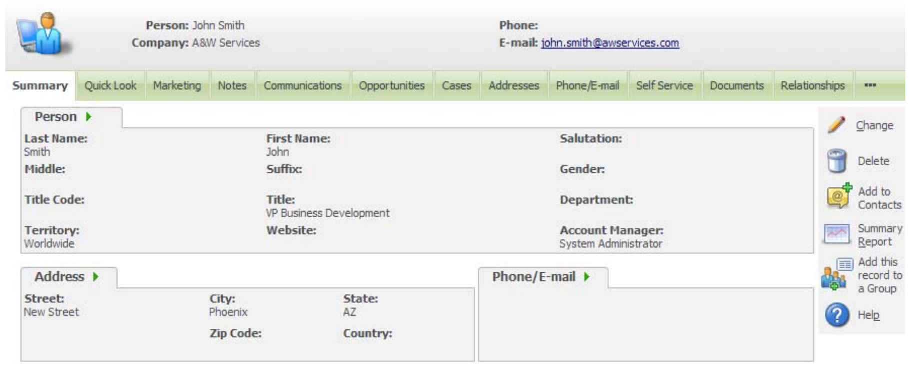
   The Company – Add Person page is displayed.
4. Complete the person's details and select the Save button in the context area. All fields marked with an asterisk are required fields.



Company – Add Person

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

Any information that you have added via your mobile device is displayed in desktop CRM.



Person summary screen

Doing Your Work

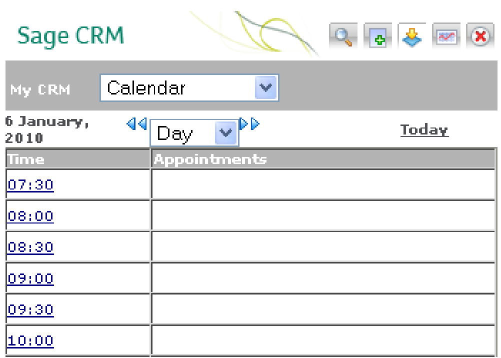
You can schedule tasks and appointments for yourself or for a colleague that are not linked to any particular entity. You can also create appointments and tasks that are linked to specific companies, people, opportunities, cases, and leads. This section provides an example of both and it provides an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

Note: The Documents tab is not supported on mobile devices.

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:

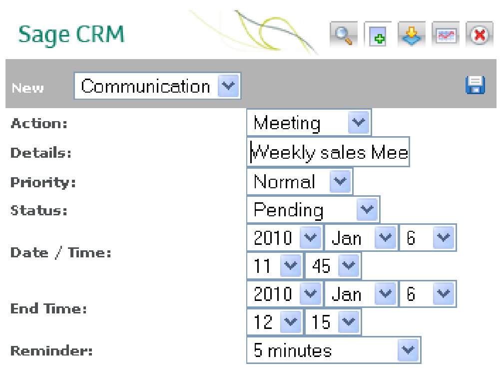
– Select the time the appointment is due to take place. You can select the time and date you want to associate with the appointment by selecting the year, month, day and time using the drop-down lists.

– 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.



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, or case. The communication will be saved in the context within which it was created. For example, to create a Communication that is linked to a person:

  – Open the summary page for the person.

  – Select Communications from the list in the context area.

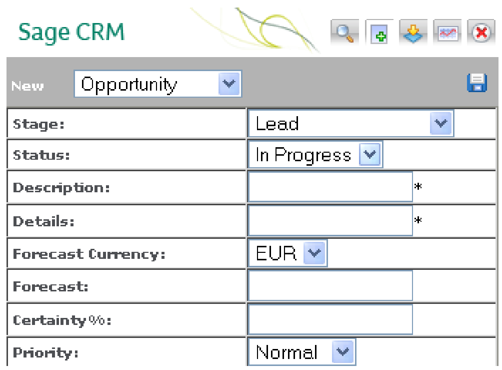
  – Select the New action button.

  – When you fill in the details and save it, the communication is saved within the context of the person.

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.



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.

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.

Note: Workflow buttons are not available when working with CRM via a mobile device.

Reporting

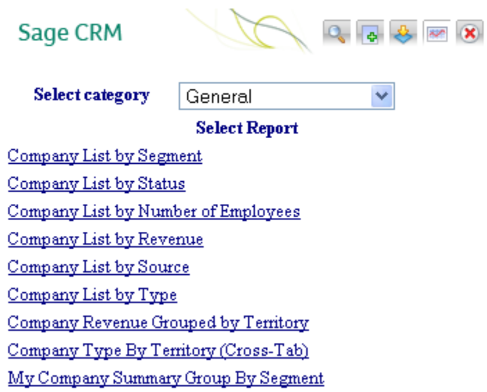
CRM includes sample reports in various categories, for example Sales and Customer Care. You can run the reports on your mobile device by selecting the Reports button.

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.

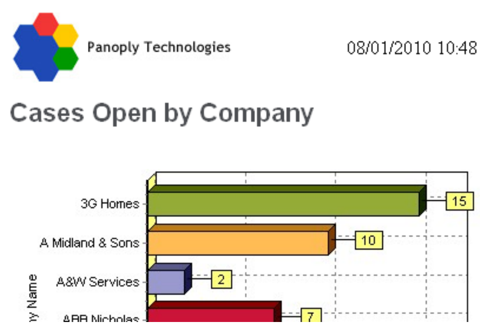


Select Report page

4. Click on the hyperlink of the report you want to run.

5. Select any further Search criteria from the drop-down list and click the Run button.

   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
3G Homes	5-3	Kylie Ward	Incorrect version number.
	1-4	Kylie Ward	Will not load any of the software
	1-7	Kylie Ward	Custom screen not using normal fonts.
	5-10025	Kylie Ward	Server Crash during peak traffic
	5-10026	Kylie Ward	Incorrect time for North America
	5-10049	Kylie Ward	Upgrade issues
	5-10052	Kylie Ward	How do we add in an extra column ?

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.

Classic Dashboard

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

To select a Classic Dashboard for your mobile device:

1. From your desktop, open My CRM | Dashboard and click the Go To The Classic Dashboard hyperlink.

   Note: The Interactive Dashboard is not available on mobile devices.

2. Select the Classic 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 Classic Dashboard you have selected will be displayed when you view the Classic Dashboard from your mobile device.

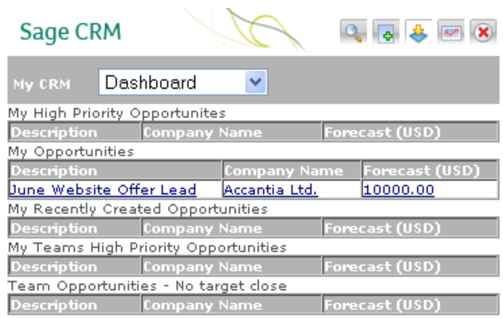
   Please refer to the *User Guide* for more information on creating and adding content to Interactive and Classic dashboards.

To view a Classic 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.



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 IE Mobile device. (Refer to the documentation accompanying your device 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 device 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.

   Note: It is not possible to synchronize with Microsoft Outlook from a BlackBerry. For further information, please speak to your System Administrator.

Now you can...

- 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 Classic Dashboard for your mobile device.
- Synchronize with Microsoft Outlook.