

**Sage CRM**

# Sage CRM 2016 R1 Mobile Guide

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# Chapter 1: Introduction to Sage CRM Mobile Solutions

Sage CRM Mobile Solutions include applications (apps) and UI themes that let you work with Sage CRM on a mobile device. For a list of features that are available in Sage CRM Mobile Solutions, see the *Sage CRM Mobile Feature Matrix* on the Sage CRM Help Center (<http://help.sagecrm.com>).

**Sage CRM mobile apps**, developed for specific devices and operating systems, give you online and offline access to Sage CRM by storing some Sage CRM data on your device. There are three apps.

- Sage CRM for iPhone
- Sage CRM for Android™ (smartphone)
- Sage CRM Sales Tracker for Windows 8 (tablet) available for Sage CRM Professional

**Sage CRM Mobile** allows you to work online using a web browser on any mobile device, such as a smartphone or tablet. Each device has a string of text, called a user agent, that describes the device to Sage CRM. The user agent contains the version of browser and operating system that's on the device. Sage CRM interprets the user agent and based on mappings that you've set, it displays the associated UI theme on the mobile device. A UI theme is like a style sheet that defines how Sage CRM appears on a particular mobile device. There are two pre-defined themes. You can [create new themes](#) if necessary.

- Smartphones and tablets map to the *Sage CRM Mobile* theme.
- IE mobile devices and Blackberries map to the *Sage CRM Classic Mobile* theme.

# Chapter 2: Setting up Sage CRM Mobile Apps

- [Prerequisites for Sage CRM mobile apps](#)
- [Enabling users for Sage CRM mobile apps](#)
- [Customizing screens for Sage CRM mobile apps](#)

## Prerequisites for Sage CRM mobile apps

- A Sage CRM Professional account.
- **Mobile access** for users who want to use Sage CRM mobile apps.
- **Custom fields** for person or opportunity screens as required. This applies to iPhone and Android smartphones only.
- iOS 7.1 on an iPhone, Android 4.4 on an Android smartphone, and Windows 8 on a Windows tablet.
- Connectivity from the mobile device to the Internet. We recommend a strong wireless network connection for downloading large amounts of data to the Sage CRM mobile app.

## Enabling users for Sage CRM mobile apps

1. Click **<My Profile> | Administration | Users | Users**.
2. Enter the user's last name and click **Find**.
3. Click the hyperlink of the user you want to enable and click **Edit**.
4. Set **Mobile Device Access** to **True**.
5. Set **Web Service Access** to **True**.
6. Click **Save**.

## Customizing screens for Sage CRM mobile apps

You can customize person and opportunity screens for Sage CM mobile apps but remember if you add too many fields to a small screen, it may look crowded and be difficult for users to work with.

1. Click **<My Profile> | Administration | Customization | Primary Entities | Person or Opportunity**.
2. Click the **Screens** tab.
3. To add fields to the person summary screen, click **PersonMobileExtra**. To add fields to the opportunity summary screen, click **OpportunityMobileExtra**.
4. Add the new fields and click **Save**.
5. Log on to the Sage CRM mobile app and tap **Person** or **Opportunity**.
6. Click the green arrow at the top of the screen to see the new fields.

For more information on screen customization, see the *System Administrator Guide*.

# Chapter 3: Setting up Sage CRM Mobile

- Prerequisites for setting up Sage CRM mobile
- Enabling users for Sage CRM Mobile
- Mapping user agents
- Defining user agents
- Creating a new mobile theme
- Customizing screens for Sage CRM Mobile
- Customizing classic dashboards
- Setting a default tablet view
- Troubleshooting Sage CRM Mobile



## Prerequisites for Sage CRM Mobile

- A Sage CRM Cloud Professional account.
- **Mobile access** for users who want to use Sage CRM Mobile.
- **User agents mapped to UI themes**.
- **Screens customized** as required. The dashboard customized for improved viewing on mobile devices.
- Connectivity from the mobile devices to the Internet.
- If a firewall is installed at the implementation site, ensure traffic directed to the CRM server via the Internet is allowed through.



If you have Classic Outlook Integration set up on your Sage CRM system, updates are reflected in the tasks, appointments, and contacts accessed using Sage CRM Mobile on most devices.

## Enabling users for Sage CRM Mobile

1. Click **<My Profile> | Administration | Users | Users**.
2. Enter the user's last name and click **Find**.
3. Click the hyperlink of the user you want to enable and click **Edit**.
4. Set **Mobile Device Access** to **True**.
5. Click **Save**.

## Mapping user agents

In most cases, Sage CRM automatically maps the user agent to a UI theme.

However, if there's no preconfigured mapping for a user agent to a UI theme so you must manually configure the mapping.

1. Click **<My Profile> | Administration | Advanced Customization | Devices | View unassigned user agents**.
2. Click the user agent and the theme (device) you want to map it to.
3. Click **Save**.

## Defining user agents

If you want to map a new user agent that's not yet listed in Sage CRM, you must first define the user agent and then map it to the most appropriate UI theme.

When a new device attempts to connect to Sage CRM, it sends its user agent and Sage CRM adds it to the list of defined user agents if it isn't already included. But suppose you don't yet have the device; each of your users will get one next month you need to configure Sage CRM in preparation. Because the device can't send its user agent, you must obtain the user agent from the Internet and type it into Sage CRM.

1. Click **<My Profile> | Administration | Advanced Customization | Devices**.
2. Click the theme to which you want to map the user agent.
3. Enter the user agent in **Type a new user agent**.
4. Click **Add**. The user agent is mapped to the theme (device).

## Creating a new mobile theme

There are two pre-defined Sage CRM mobile themes. A mobile theme is called a *device* in the Sage CRM UI.

- Smartphones and tablets map to the *Sage CRM Mobile* theme.
- IE mobile devices and Blackberries map to the *Sage CRM Classic Mobile* theme.

You can create a new theme by modifying an existing theme (device). For example, you might want to create an iOS theme and map all user agents for old versions of iOS to it.

1. Click **<My Profile> | Administration | Advanced Customization | Devices** and click the theme (device) you want to modify.
2. Complete the **Device** fields described in the table below.
3. Click **Save**. The new theme is displayed in the list of themes (devices).

Field	Description
Administrative Description	The administrator's description.
User Description	The description that the end user sees in Sage CRM.
XSL File Name	The name of the Extensible Stylesheet Language (XSL) transformation file required to convert Sage CRM output to a format that the mobile device can understand.
Based On Device	The existing theme (device) that the new theme is based on. Choose from this list only if the device is not listed in the Devices list in <b>&lt;My Profile&gt;   Administration   Customization   Primary Entities</b> or <b>Secondary Entities   &lt;Entity&gt;   Screens</b> .
HTTP Accepts	The unique markup language used by the device to send information to Sage CRM.
HTTP Content Type	The markup language that Sage CRM uses to reply to the device.
Supports HTML Frames	Specifies whether the device supports HTML frames.
Device Image Extension	The image extension to use with the device. For example, .jpg, .gif, .png.
Device Code Page	The character set to use with the device. For example, shiftjs or UTF-8.
Device Max Rows	The maximum number of rows that can appear in a grid.
Device CSS File	The CSS file to associate with the device.
Browser Type	The browser type supported by the device. HTML 4 delivers the normal desktop UI to the device. If you want Sage CRM to assign a browser type, choose <b>Other</b> .

## Customizing screens for Sage CRM Mobile

You can customize mobile screens, lists, and tabs for Sage CRM Mobile. Ensure that the customized UI is optimized for the smaller screen size of many mobile devices. If you add too many fields to a screen, it may look crowded and be difficult for users to work with. Before you begin customizing, you must select the correct device type.

This example adds a Company ID field to link a communication with a company on Sage CRM Mobile.

1. Click **<My Profile> | Administration | Customization | Primary Entities | Communication**.
2. Click the **Screens** tab.
3. Choose the mobile theme from **Devices**.
4. Click **Custom Communication Detail Box**.
5. Choose the **Comm\_Link: Company** field and click **Add**.
6. Click **Save**.
7. Log in to Sage CRM using a mobile device and browse to **New | Communication** to see the new field.

For more information on screen, list, and tab customization, see the *System Administrator Guide*.

## Customizing classic dashboards

Classic dashboards are available for upgrade customers only.

You can modify a classic dashboard for Sage CRM Mobile. For example, you might want to limit the content available to mobile users. First you must specify that a classic dashboard is available to mobile users. You can then create or modify a classic dashboard in the usual way.

1. Click **Dashboard | Classic Dashboard**.
2. Choose a classic dashboard from **Dashboard**.
3. Click **Edit Dashboard Details**.
4. Select **Set As Mobile Dashboard** and **Save**.

## Setting a default tablet view

There are two Sage CRM views available for a tablet.

- The Tablet view displays Sage CRM optimized for iPad or Android Tablets on 10" or 7" screens.
- The Desktop view displays the same look and feel as Sage CRM on Desktop. The Desktop view uses the Sage CRM responsive UI.



To display the Interactive Dashboard on a tablet, you must use the Desktop view.

You can set a default tablet view.

1. Click **<My Profile> | Administration | Users | Users**.
2. Enter the user's last name and click **Find**.
3. Click the hyperlink of the user you want to enable.
4. Click **User Preferences** and click **Edit**.
5. Set **Default Tablet Version** to either **Desktop Version** or **Tablet Version**.
6. Click **Save**. The selected view is displayed the next time the user logs on to Sage CRM from a tablet.



## Troubleshooting Sage CRM Mobile

If you experience problems while using Sage CRM Mobile from a smartphone or tablet, check the following troubleshooting tips.

### **Sage CRM Mobile is not displayed**

Ensure that the user agent for the mobile device is correctly mapped to the device in Sage CRM. The user agent might either be unassigned to a theme (device), or assigned to a different theme (device). For more information, see [Mapping user agents \(page 9\)](#).

### **Sage CRM Mobile is not displayed when Sage CRM is accessed through a link on the home screen**

The mobile device sends a different user agent when a link is accessed from the home screen. Check unassigned user agents for a mobile device user agent, and map it to the correct theme (device).

### **Default logon screen displayed instead of the Sage CRM Mobile screen**

Sage CRM metadata has not yet been loaded. For example, due to IISReset. When you log on, Sage CRM Mobile is displayed as expected.

# Chapter 4: Working with Sage CRM Mobile Apps

1. Ensure you've got the required operating system on your mobile device.
2. Connect your mobile device to the Internet and download the Sage CRM mobile app. We recommend a strong wireless network connection for downloading large amounts of data to the Sage CRM mobile app.
  - Download Sage CRM for iPhone from the [Apple App Store](#).
  - Download Sage CRM for Android from the [Google Play Store](#).
  - Download Sage CRM Sales Tracker from the [Windows App Store](#).



User Help is included in the specific app. For example, Help for working with Sage CRM for iPhone is included in the Sage CRM for iPhone app.

# Chapter 5: Working with Sage CRM Mobile

- [Logging on and logging off](#)
- [Adding a home screen icon](#)
- [Finding information](#)
- [Changing information](#)
- [Adding information](#)
- [Navigating your calendar](#)
- [Running a report](#)
- [Working with the classic dashboard](#)

## Logging on and logging off

1. Open the Internet browser on your mobile device and enter the URL you use to access Sage CRM.com on your desktop or laptop.
2. Enter your user name and password and tap **Sign In**. When you log on first, you're brought to the Sage CRM Mobile homepage where, depending on your user rights, you can see the main Sage CRM menu options.
3. To log off, tap **Logout** on the homepage menu.



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

## Adding a home screen icon

To add a Sage CRM icon to your home screen:

1. Access Sage CRM Mobile on your device.
2. Tap the **Add Bookmark** icon on the bottom toolbar, then **Add to Home Screen**.
3. On the Add to Home screen, tap **Add**. The browser app closes, and a Sage CRM icon appears on your home screen.

On some devices, you may be able to add a CRM home screen icon directly from the home screen:

1. Tap the **menu** button on your device.
2. Tap **More**, then **Add shortcut to Home Screen**. The Sage CRM icon is displayed on your home screen.

## Finding information

1. Tap **Find** on the homepage menu.
2. Choose the entity category from **Company**, **Person**, **Case**, **Opportunity**, or **Lead**.
3. Enter one or more search criteria.
4. To start the search, tap the **Find** button.
5. If there's more than one page of results and you want to view another page, enter a page number and tap **Go to page**.
6. To drill down into the information, tap the record link or side arrow if present.
7. To find a communication that's linked to a company, person, or opportunity:
  - Find and open the company, person, or opportunity record.
  - Tap **Communications** from the list in the context area.
  - You can search for other linked records in the same way.
8. For a company, person, or lead record, you can do the following.
  - If you're using a tablet, tap a phone number to create a new contact or update an existing contact in your tablet's contact book. This behavior is device dependent.
  - If you're using a smartphone, tap a phone number to make a phone call directly from any record containing a valid phone number.
  - To view a map of a contact's location, tap the **Search** icon in **Address**. To let Google Maps use your current location, tap **OK**. The map is displayed in a new window.



Sage CRM Mobile cannot display documents associated with a company, person, case, opportunity, or lead.

## Changing information

1. Find and open the record you want to edit and tap **Change**.
2. Tap the field you want to update and make your changes. The updated information is displayed on your mobile device and also in desktop Sage CRM.
3. Tap **Save**.



Your Sage CRM administrator may have disabled updates to certain types of information to ensure that workflow is not compromised. In this case, **Change** is not available.

## Adding information

1. Tap **New** on the homepage menu.
2. Choose the entity category.
3. Complete the entry screen fields. You might need to swipe down to complete all the fields.
4. Tap **Save**. The new information is displayed on your mobile device and also in desktop Sage CRM.
5. To create a communication that's linked to an existing company, person, or opportunity:
  - Find and open the existing company, person, or opportunity record.
  - Tap **Communications** from the list in the context area and tap **New**.
  - Enter the details and tap **Save**. The communication is saved in the context of the existing record.
  - You can create new person, opportunity, and case records in the same way. The new record is saved in the context of the existing record.



Workflow actions are not available on Sage CRM Mobile.



## Navigating your calendar

The calendar is divided into Appointments and Tasks. You may need to swipe down to view tasks.

- Tap **My CRM** on the homepage menu and tap **Calendar**.
- You can view the calendar in daily or weekly view. To change the calendar view, choose **Day** or **Week**.
- To filter the calendar, use the Action and Status filtering options. For example, set **Status** to **Pending** to see only pending tasks and appointments in your calendar.
- To navigate to a different day or week, use the arrows beside the current date or week.
- To create an appointment or task when you're in daily view, tap a time, fill in the details, and tap **Save**.
- To view a list of appointments and tasks for a particular day when you're in weekly view, tap the day.

## Running a report

1. Tap **Reports** on the homepage.
2. Choose a report category. Depending on your access rights, you can run sample Sage CRM reports and any reports that you've already created on your desktop.
3. Tap the report you want to run.
4. Choose search criteria and tap **Run**. The report is displayed. To view the full report details, you may need to swipe down or rotate your mobile device if it supports horizontal viewing.

## Working with the classic dashboard

Classic dashboards are available for upgrade customers only.

Tap **My CRM** on the homepage menu and tap **Dashboard**. Your preferred dashboard is displayed.



The Interactive Dashboard is not available using the Tablet view. You can access it from a tablet using the Desktop view.

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CRM Document Version Code: CLO-WMG-ENG-161-1.0