Sage CRM

Sage CRM 7.3
Mobile Guide

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Contents

Chapter 1: About this Guide

This guide is for users and system administrators.

We assume that:

- Users operate 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 guides.

The table below gives a summary of each chapter.

Chapter	Summary
Introduction to Sage CRM Mobile Solutions (page 2-1)	An introduction to Sage CRM Mobile Solutions.
Getting Started with Sage CRM Mobile Solutions (page 3-1)	Outlines the steps that users and system administrators need to take to access Sage CRM Mobile on a mobile device and prerequisites for using Sage CRM mobile applications.
Working with Sage CRM Mobile (page 4-1)	Explains how to work with Sage CRM Mobile on a mobile device. Help for working with Sage CRM mobile applications 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 2: Introduction to Sage CRM Mobile Solutions

About Sage CRM Mobile Solutions

- **Sage CRM Mobile** allows you to work online using a browser on any mobile device, such as a smartphone or tablet. Each device has a user agent which is a string of text that identifies the exact version of the browser and operating system on the device. There are two Sage CRM UI themes that user agents map to. Smartphones and tablets map to the *Sage CRM Mobile* theme. IE mobile devices and Blackberries map to the *Sage CRM Classic Mobile* theme. These devices link to XSL files which render the appropriate theme.
- **Sage CRM mobile applications** (apps), developed for specific devices and operating systems, give you online and offline access to Sage CRM by storing some of your Sage CRM data on your device.
  - Sage CRM for iPhone
  - Sage CRM for Android (smartphone)
  - Sage CRM Sales Tracker for Windows 8 (tablet).

For an overview of Sage CRM Mobile Solution features, see the Sage CRM Mobile Feature Matrix available on the Sage CRM Community.

Prerequisites for Sage CRM Mobile

- Sage CRM installed on a server with a valid Mobile license key. If you do not have a 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.
- URLs set up by the Network Administrator to access Sage CRM from inside and outside your corporate network.
- To consider customizations you may want to implement on screens, lists, tabs, and the Classic dashboard for improved viewing on mobile devices.

If a firewall is installed at the implementation site, make sure 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 *Install/Upgrade Guide*.

If you have Classic Outlook or Exchange Integration set up on your Sage CRM system, you can expect the updates to be reflected in the tasks, appointments, and contacts accessed via Mobile Web on most devices.

Prerequisites for Sage CRM mobile apps

- A Sage CRM 7.2 or later On-Premise installation.
- iOS 7.1 on your iPhone, or Android 4.0 on your Android smartphone, or Windows 8 on your Windows tablet.
- The Sales CRM for Mobile Apps component downloaded from the Sage CRM Community and installed on your Sage CRM installation.
- Sage CRM installed on a server with a valid Mobile license key. If you do not have a valid license key, you will receive the message "Current CRM Installation is not licensed for mobile".
- Users enabled for mobile access.
- Connectivity from the mobile device to your corporate network or the Internet.
- The Sage CRM mobile app downloaded to your mobile device.
    - Download Sage CRM for iPhone from English speaking versions of the Apple App Store.
    - Download Sage CRM for Android from the Android App Store.
    - Download Sage CRM Sales Tracker from the Windows App Store.
- Screens customized as required.This applies to iPhone and Android smartphones only.

Chapter 3: Getting Started with Sage CRM Mobile Solutions

Enabling users for Sage CRM Mobile Solutions

Users must be enabled to access Sage CRM Mobile and Sage CRM mobile applications.

1. Click **Administration | Users | Users**.
2. Click the hyperlink of the user you want to enable and click **Change**.
3. Set **Mobile Device Access** to **True**.
4. For Sage CRM mobile applications only, set **Web Service Access** to **True**.
5. Click **Save**.

URLs for accessing Sage CRM Mobile

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

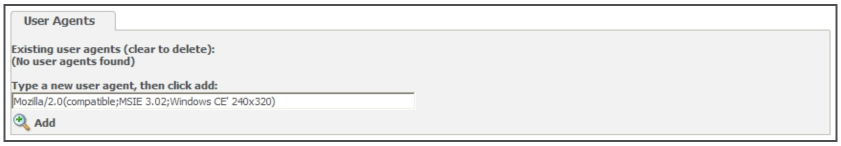
The URL for accessing CRM from inside the corporate network is the same as the URL for accessing CRM from your desktop and is typically in the format **http://yourserver/yourapp**.

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

Mapping user agents

Every mobile device has a user agent, which describes the device to Sage CRM. Sage CRM determines which user agent the device uses and maps it automatically. You must map an existing user agent to a theme if Sage CRM doesn't know the type of smartphone or tablet.

1. Click **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.



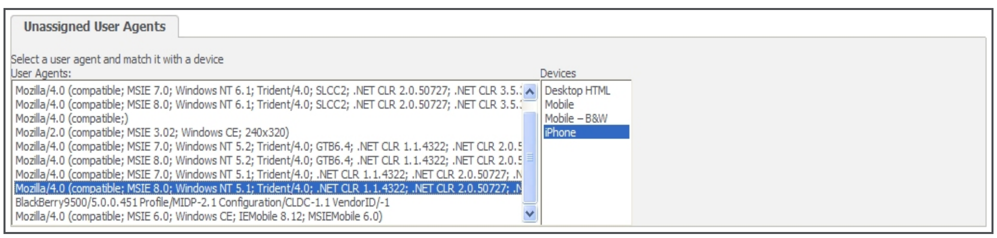
User Agent field

3. Click **Add**. The user agent is mapped to the device.

Mapping unassigned user agents

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

1. Click **Administration | Advanced Customization | Devices | View Unassigned User Agents**. The Unassigned User Agents page is displayed.



Unassigned User Agents

2. Click the user agent and the device you want to map it to.
3. Click **Save**. The unassigned user agent is now mapped to a device.

Customizing mobile screens

You can customize screens, lists, and tabs on mobile screens. 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 the user to work with.

You customize mobile screens, lists, and tabs in the same way as you customize them in Sage CRM. However before you begin customizing, you must select the correct device type.

> The only supported actions on mobile are runtabgroup and runblock.

This example links a communication with a Person and Company on Sage CRM Mobile.

1. Click **Administration | Customization | Communication**.
2. Click the **Screens** tab.
3. Select the theme from **Devices**.
4. Click **Custom Communication Detail Box**.

5. Add the "cmli_comm_companyid" and "cmli_comm_personid" fields to the screen and click **Save**.
6. Login to CRM using a mobile device and browse to **New | Communication**. You can see your new fields have been added.

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 users. For example, you might want to limit the content available to mobile users. To specify that a classic dashboard is available to mobile users, select **Set As Mobile** on the Dashboard Details screen. You can then create or modify a 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.

Note: The Extensibility Module is required for block customization.

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

1. Click **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.

Making entities read-only for smartphone access

Companies, People, Cases, Opportunities and Leads can all be made read-only. You may want to do this if you have workflow on an entity which might be affected by an update from a mobile device. If you want to make these entities read-only, then open the following JavaScript file using Notepad or a similar text editor:

CRM Installation Folder\wwwroot\smartphone\SageiPhone.js

At the top of the page, you will see the following section. Update the values accordingly. The accepted values are **true** or **false**.

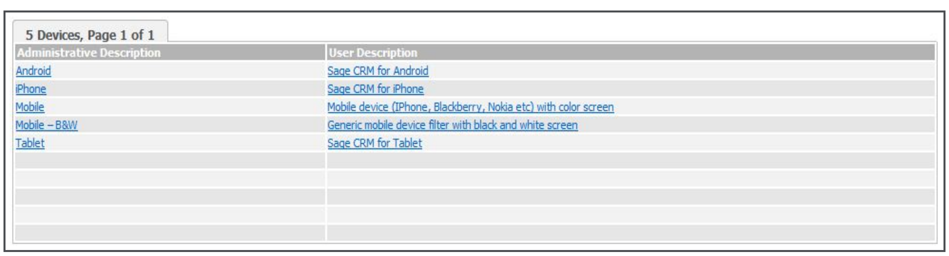
```
/*************************************
* Start Configurable Section
/*************************************/
// set to false if you do not want users to be able to change
opportunities
var updateOpportunities = true;
// set to false if you do not want users to be able to change
cases
var updateCases = true;
// set to false if you do not want users to be able to change
leads
var updateLeads = false;
// set to false if you do not want users to be able to change
companies
var updateCompanies = true;
// set to false if you do not want users to be able to change
people
var updatePeople = true;
/*************************************
* End Configurable Section
/*************************************/
```

Setting up additional devices

When 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 use to access CRM. However, developers can set up additional devices if required by modifying an existing device.

To modify an existing device:

1. Click **Administration | Advanced Customization | Devices**. A list of devices is displayed.

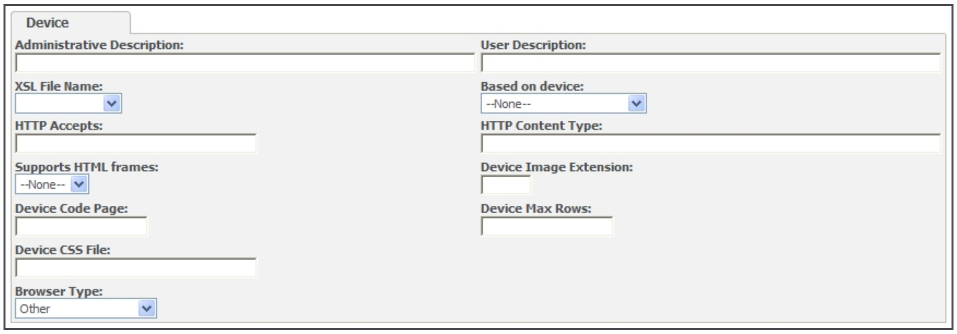


5 Devices, Page 1 of 1

Administrative Description	User Description
Android	Sage CRM for Android
iPhone	Sage CRM for iPhone
Mobile	Mobile device (iPhone, Blackberry, Nokia etc) with color screen
Mobile – B&W	Generic mobile device filter with black and white screen
Tablet	Sage CRM for Tablet

Devices list

2. Click the device you want to modify. The **Device** input form is displayed.



Device input form

3. Replace the description in **Administrative Description** with the description of the device you want to set up.
4. Replace the description in **User Description** with the description of the device that you want the end user to see.
5. Select the XSL transformation file your device requires from **XSL File Name**.
6. Select an alternative device from **Based On Device** if the device you're setting up is not included in 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 **HTTP Accepts**.
8. In **HTTP Content Type**, type the language that CRM will use to reply to the device.
9. Select **Yes** or **No** from **Supports HTML Frames** to specify whether or not the device supports frames and click **Save**. 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(x86)\Sage\CRM\<installname>\WWWRoot\Themes\XSL.

Based On Device	If the device you're 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. 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 UTF-8.
Device Max Rows	Specify the maximum number of rows that can appear in a grid.
Device CSS File	Specify 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're not sure what to set this to and want CRM to assign a browser type, select Other.

Troubleshooting Sage CRM access from mobile devices

Sage CRM Mobile allows you to work online using a browser on any mobile device. Each device has a user agent which is a string of text that identifies the exact version of the browser and operating system on the device. There are two Sage CRM UI themes that user agents map to. Smartphones and tablets map to the *Sage CRM Mobile* theme. IE mobile devices and Blackberries map to the *Sage CRM Classic Mobile* theme. These devices link to XSL files which render the appropriate theme. If you experience problems while using Sage CRM Mobile from a smartphone or tablet, check the following troubleshooting tips.

Sage CRM Mobile theme is not displayed on the device

Ensure that the user agent for the smartphone or tablet is correctly mapped to the device in CRM. The user agent might either be unassigned to a device, or assigned to a different device. Please refer to Mapping user agents (page 3-1) for more information.

Devices link is not available in Advanced Customization area

The mobile license for Sage CRM is not installed. Contact your Business Partner about obtaining a license key with the mobile option.

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

The smartphone or tablet sends a different user agent when a link is accessed from the home screen. Check the unassigned user agents for a smartphone or tablet user agent, and map it to the correct device.

Smartphone or tablet cannot locate the CRM web server

Ensure that the CRM installation is either publicly accessible or that the smartphone is connecting to a VPN which can access the CRM installation.

Default logon screen displayed instead of the smartphone screen

CRM metadata has not been loaded yet (for example, due to IISReset). Log on, and the smartphone theme will be displayed as expected.

Chapter 4: Working with Sage CRM Mobile

Logging on

1. Open the Internet browser on your mobile browser and enter the URL given to you by your system administrator If you already access Sage CRM from your desktop, type in the URL you normally use. This usually looks like this: **http://yourserver/yourapp**. The Logon page is displayed.
2. Enter your user name and password and tap **Log On**.You are logged on. By default, a successful logon displays the Sage CRM Mobile home page.

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.

Setting a default tablet view

When working on a tablet, it is possible to work with two different views of Sage CRM:

- The Tablet view is optimized for the iPad or the Android Tablets on 10" or 7" screens.
- The Desktop view displays the same look and feel as Sage CRM on Desktop. If you want to take advantage of Sage CRM's fully featured UI, use the Desktop mode.

To set a default access preference when working with Sage CRM from a tablet device:

1. Log on to Sage CRM from your desktop.
2. Click **My CRM | Preferences**.
3. Set the **Default Tablet Version** field to either **Desktop Version** or **Tablet Version**.
4. Click **Save**.

Next time you log on from the tablet device, the selected theme is displayed.

Logging off

To log off, tap **Logout** on the Sage CRM Mobile homepage.

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

Navigating the mobile screen

When you log on first, you will be brought to the Sage CRM Mobile homepage where, depending on your user rights, you will be presented with the main CRM menu options.

Finding information

1. Tap **Find** and select the entity category you want to search for. Options available are **Company**, **Person**, **Case**, **Opportunity**, and **Lead**.

> Documents are not supported on the mobile web solution. Any documents associated with a Company, Person, Case, Opportunity, or Lead are not visible to users accessing Sage CRM on mobile.

2. Type in one or more search criteria.
3. Tap **Find** to start the search.
4. Tap one of the links to drill down on the customer information. If you get a long list of results you can jump to the page number you want by entering the page number in the **Go To Page** field and tapping the arrow to the right.
5. If you're using a tablet, tap a phone number to create a new contact or add to an existing contact in your tablet's contact book. This behavior is device dependent.

6. If you're using a smartphone, tap a phone number to make a phone call directly from within any record containing a valid phone number.
7. To view a map of a contact's location, tap the **Map** icon in the **Address** field. A message displays to say Google Maps wants to use your current location. Tap **OK** to accept, and the map is displayed in a new window.

Changing customer information

To update a record, tap **Change**.

> Your Sage CRM administrator may have disabled updates to certain types of information to ensure that the workflow is not compromised. If this is the case, then the Change button is not available.

To edit, for example, a Communication record for the current company:

1. Choose a communication from the Communication tab and tap **Change**. The record is displayed in edit mode.
2. Tap the field you want to update.
3. Tap **Save**.

Adding customer information

1. Tap **New**. A list of record types that you have access to create is displayed.
2. Tap the record type you want to create. The entry screen is displayed.
3. When you've filled in the fields, tap **Save**. If there are any validation errors, a pop-up message is displayed and any unfilled required fields are highlighted.
4. When all required fields have been completed, tap **Save**. The Summary page is displayed.

Example: Adding a new company

1. Tap **New** on the Sage CRM Mobile homepage.
2. Tap **Company**.
3. Complete the new company's details and tap **Save**. If there are any validation errors, you receive a pop-up message and required fields appear in red. Any information that you add via your mobile device is also displayed in desktop Sage CRM.

Navigating your calendar

You can view the calendar in daily or weekly view.

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

- To filter the calendar, use the filtering options. For example, set the **Status** field to **Pending** to only see pending tasks and appointments in your calendar.

- To navigate through the pages, use **Next Previous**.
- To create a new task within the daily view, tap **New**.
- To create a new appointment:
  1. Select the time and date the appointment is due to take place.
  2. Fill in the details.
  3. When you save it, the communication is saved in your My CRM work area.
- To view a specific day, tap the date of that day.
- While in daily view, you can tap a time to add an appointment for that time slot.
- If you're in weekly view, you can tap a day to be brought to the summary for that day.
- You can create a communication that is linked to a person, company, opportunity, or case. For example, to create a Communication that is linked to a person:
  1. Open the summary page for the person.
  2. Tap **Communications** from the list in the context area.
  3. Tap **New**.
  4. 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. Tap **New** on the menu, and select **Lead**, **Opportunity**, or **Case** from the New menu.
2. Type the details in the input form. You may need to swipe down to complete all of the details.
3. Tap **Save**.
   Alternatively, find a specific person or company and link the lead, case, or opportunity to it.

To update an existing lead:

1. Find the lead, opportunity or case, and open the Summary page.
2. Tap **Change**.
3. Make your changes and tap **Save**.

> Workflow actions are not available when working with Sage CRM via mobile web.

Search Select Advanced fields

A small magnifying glass displayed next to a small down-pointing arrow indicates that the field is a Search Select Advanced field. For example, it is displayed for the Company and Person fields on the New Case page.

Where the Search Select Advanced icon is present, you can type a few letters, tap the magnifying glass icon, and search matches are displayed underneath the field. Tap one of the results and the text box is filled in. If only one item is found, the description is filled in straight away.

Once you've linked a record, such as a company or person, to the search select field, you can jump to the summary page of the company or person.

Running a report

You can view reports if you have the appropriate rights.

Sage CRM includes sample reports in various categories, for example Sales and Customer Care.

To run a sample report:

1. Tap **Reports** on the homepage.
2. Select a category from the **Select Category** list. A list of reports available in that category is displayed.
3. Tap the report you want to run.
4. Select any further Search criteria from the dropdown list 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.

> You can run any reports that you've created from your desktop on your mobile device. You run them in the same way as you run sample reports.

Working with the classic dashboard

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

Note: Only customers who've upgraded from SageCRM.com v7 have access to the Classic Dashboard.

To select a Classic Dashboard:

1. From your desktop, click **My CRM | Dashboard | Go To The Classic Dashboard** .

> The Interactive Dashboard is not available on smartphones and older mobile devices. However, you can work with the interactive dashboard on a tablet if you've set your tablet to Desktop mode.

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 **Edit Dashboard Details**. The **Dashboard Details** page is displayed.
4. Select **Set As Mobile Dashboard** and then click **Save**. Please refer to the User Guide for more information on creating and adding content to Interactive and Classic dashboards.
5. When you have completed the setup in the full browser, the dashboard is accessible from your mobile device.

To view a Classic Dashboard from your mobile device:

1. Tap **My CRM** if you're not already in the My CRM context.
2. Tap **Dashboard** from the list in the context area. Your preferred Dashboard is displayed.