RESCO MOBILE CRM
USER GUIDE

iPad, iPhone, Android phones & tablets, Windows Phone 7 & 8,
Windows XP/Vista/7/8.1 and RT/Surface, Windows Mobile
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1. **Synchronization**

1.1. How to synchronize your device

1. Tap the Sync button.

2. Fill in the following:

   **User Mode**: Standard User

   **Url**: The address where the MS Dynamics CRM server is located; e.g. https://companyname.crm.dynamics.com

   **User Name & Password**: The name and password you are using to connect to your Dynamics CRM server.

   **Save password**: The app will save your password and you won’t be prompted to insert it again next time you synchronize the app.

3. Tap the Sync button again to connect to your CRM server.
1.2. Sync troubleshooting

If you have trouble connecting to your server, please check the Synchronization Guide:
http://www.resco.net/mobilecrm/support-appStore.aspx

Note: Windows Phone limitation – Active Directory sync method is not supported on Windows Phone 7.x due to the limitations of the device.

Note: If you see the error message: “HTTP Error unauthorized (401)”, you most likely entered incorrect CRM user credentials.
2. **Online/Offline mode**

The app can run in online or in offline mode:

**Online mode** – you always access real-time data from your CRM server. Any change you make (create new account, edit order, delete contact etc.) is instantly reflected on your CRM server as well. Active mobile Internet connection or WiFi is necessary.

**Offline mode** – the application stores the Dynamics CRM data in the local database of your device. If you don’t have internet connection, you will still be able to access your data. The changes that you make (create new account, edit order, delete contact etc.) will be reflected on your Dynamics CRM server after you synchronize the app.

Watch a short video on how to switch between the online and offline mode.
3. Dashboard

In the free version, the dashboard shows by default orders (pie chart), opportunities (column chart) and cases (bar chart).

The charts can be drilled down, so you can examine the data in depth. For example: tap on the Opportunities chart and choose Customer to analyze them according to customers. Reset the chart by tapping on it again and choose another variable if you want to analyze it from a different angle.

Learn what dashboards can do by watching a short video.
4. Map

The interactive map shows your Accounts, Contacts and Leads.

You can zoom in, zoom out and select any record by tapping on it. When you select a record, you can view, edit or delete details associated with the record. You can even let the map navigate you to selected record. Just open one, go into a Map tab and click the Navigate To button.

4.1. Enabling the map

The map works with GPS coordinates, that is with “latitude” and “longitude” fields, not with the actual addresses of the records. If you do not see any records on the map, it is because you don’t have these fields filled in.

You can either manually fill in longitude and latitude fields on the server, or you could use the ‘Update GPS’ button to assign a GPS position to a record when the mobile device is at the desired (target) location. Set this up in the Address Tab of the chosen record by tapping the More button (upper right corner) or you can use the Geocoding functionality of Woodford.
4.2. Filtering and searching within the map

Map can be filtered to view:
- All (Accounts + Contacts + Leads) – accounts are red, contacts are green, leads are yellow
- Accounts
- Contacts
- Leads

Dynamic map search allows you to see partial results while typing the name of the record you are searching for. Records that do not match the searched string will become semi-transparent. If a record you are looking for doesn’t directly start with the searched word, but only contains it, use a percentage sign (%) in the beginning (the same way as you would use the asterisk sign (*) in the Dynamics CRM interface).

Watch this video to get more details on filtering and searching within the map.
4.3. Current location

The arrow button will show your current location on the map. This is also a default view when you switch to the map from the home menu.

4.4. Satellite vs. aerial map view

Satellite button can be used to switch between aerial and satellite map view.
5. In-app navigation

5.1. Navigation (tablets)

The app has a 3 column layout. You have a home menu on the left with several sections to choose from. Most of these represent standard Dynamics CRM entities. When you select an entity, the screen will split into two columns. Home menu is visible in the first column and records of the selected entity are visible in the second column. The second column is called “view” or “list” column. You can use the search bar to search for particular records or filter the records, if the filtering option is available for the selected entity. There is a “plus” button in the upper right corner of the second column that can be used to add a brand new record. If you select to create a new record or you choose one of the records in the list, the third column will appear. This column is also referred to as the “form” column. For the new record input the details and tap the “save button” located in the upper right corner afterwards. There is also a back button in the upper left corner of the third column. If you tap the back button, the third column will close.

Watch a short video demonstration of three tips on how to swiftly navigate through the Resco Mobile CRM application to speed up your work.
5.2. Navigation (smartphones)

The app has a 1 column layout. You have a home screen with several sections to choose from. Most of these represent standard Dynamics CRM entities. When you select an entity, you will see the records for the selected entity. This is a “view” column. You can use the search bar to search for particular records or filter the records, if the filtering option is available for selected entity. There is a “+” button in the upper right corner of the second column that can be used to add a brand new record. If you select to create a new record, you will have to input the details about the new record. You have to tap the “save button” located in the upper right corner.

If you choose one of the records in the list column, the “form” column will appear. You can see the details of the selected record there. There is always a back button located in the upper left corner of the “view” and the “form” screen.
5.3. Filtering of records

The Map, Activities and Calendar views can be filtered. You can filter the map view to see only accounts, contacts, leads or all of them. You can filter activities according to activity type, view, due date and sort. You can also filter the calendar to see all appointments or all service activities, my appointments or my service activities, or my completed appointments.

These are only the standard filters that are already included in the free version of Mobile CRM app. Professional app (licensed) can have highly customized filters on accounts, contacts, etc.

5.4. Searching for records

You can use the search functionality in all entities except for a dashboard view. You can find the search bar at the top of each view (slide downwards for iOS devices or tap the search button represented as magnifying glass icon). Search is dynamic, meaning that the Mobile CRM app will show temporary search results according to the string that you have typed in.

If a record doesn’t directly start with the letters you type, but only contains them, use a percentage sign (%) in the beginning (the same way as you would use the asterisk sign (*) in the Dynamics CRM interface).
5.5. Call or e-mail directly from the app

You can make a call or send an e-mail directly from the app. Go into a record (Account, Contact or Lead) and tap on the phone icon next to the phone number or the envelope button next to the e-mail address.

On iOS devices, you can also swipe your finger from left to right in the view column to display buttons for making a call or writing an e-mail.
5.6. Advanced Find

Similarly as in Dynamics CRM, you can add and edit conditions to create your own Views with Advanced Find.

1. Go into Accounts (or other entity such as Contacts, Leads, Opportunities, etc.).
2. Tap on the arrow next to the entity name (in the view column) and select Advanced Find.
3. Fill in the criteria and add new ones by tapping the “+” button in the upper right corner. By tapping on the first row you can group the conditions by different rules. If you want to see the results click on the button in the upper right corner.
4. Choose the Info tab from the lower panel and name the new view. Tap the save button in the upper right corner.
5. Access the Private Views created with Advanced Find by changing the view in Accounts (or Contacts, Leads, Opportunities, etc.) or all of them in Setup by clicking the Private Views option (You can also delete them in this section of Setup).

Watch this 2-minute video on how to create personal views.
6. Activities

6.1. Add a new activity

Follow these steps to create a new activity:

1. Select “Activities” from the home menu.
2. Tap the “+” button in the upper right corner and select the type of activity that you want to add (Appointment, E-mail, Phone Call, Service Activity or Task). If you do not see the list of all activities, you have to turn off the filter of activities and set it to “All” first.
3. Fill in the required details (the Subject in red is required to be filled in).
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
6.2. Convert appointment to opportunity

Follow these steps to convert an appointment to an opportunity:

1. Select “Activities” from the home menu.
2. Select the appointment that you want to convert.
3. Tap the button in the upper right corner.
4. From the drop-down list choose the option “Convert to Opportunity”.
5. Fill in the required details and hit the “Save” button in the upper right corner of the pop-up window.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
6.3. Convert appointment/call to a case

Follow these steps to convert the appointment or call to a case:

1. Select “Activities” from the home menu.
2. Select the activity that you want to convert. You can choose only Appointment or Call activity.
3. Tap the button in the upper right corner.
4. From the drop-down list choose the option “Convert to Case”.
5. Fill in the required details and hit the “Save” button in the upper right corner of the pop-up window.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
6.4. Complete appointment or call

Follow these steps to complete the appointment or a call:

1. Select “Activities” from the home menu.
2. Select the activity that you want to mark as completed. You can choose only Appointment or Call activity.
3. Tap the button in the upper right corner.
4. From the drop-down list choose the option “Complete appointment”.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
6.5. Cancel appointment or call

Follow these steps to cancel an appointment or a call:

1. Select “Activities” from the home menu.
2. Select the activity that you want to cancel. You can choose only Appointment or Call activity.
3. Tap the button in the upper right corner and choose “Cancel appointment”.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
6.6. Set call to “Made”, “Received” or “Cancel”

Follow these steps:
1. Select “Activities” from the home menu.
2. Select the call activity that you want to set as made, received or cancel.
3. Tap the button in the upper right corner and choose “Completed - Made”, “Completed - Received” or “Cancel Call”.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
7. Calendar

7.1. Switch views

Select the Calendar from the home menu to your Appointments or Service Activities. You can filter the Calendar to see only Appointments or only Service Activities and between different views (“All Appointments”, “My Appointments”, “My Completed Appointments”, “All Service Activities”, “My Service Activities”).

You will also have 4 views to choose from:

- **Agenda** – shows list of appointments or service activities for the selected day. You can switch between the days using the arrows on the top or you can slide your fingers left or right.
- **Day** – shows appointments or service activities on a daily calendar. You can switch between the days using the arrows.
- **Week** – shows appointments on a weekly calendar. You can switch between the weeks using the arrows.
- **Month** – shows appointments on a monthly calendar. You can switch between the months using the arrows.

Watch the possibilities of the calendar in this [video](#).
7.2. Create new appointment or service activity

You have 2 options to create a new appointment or service activity from the Calendar:

1. Tap the “+” button located in the upper right corner of the calendar view. Fill in the required fields and tap the “save” button.

2. In the Day, Week or Month view, hold your finger for a while on the time frame that you want your appointment or service activity to start. Move up or down to properly place your activity. Fill in the additional fields and tap the “save” button.

Reschedule the created activity with just holding your finger on the event and sliding your finger to a new day or time.
8. Accounts

8.1. Switch to a map view

You have the option to view the accounts on the map.

1. Select “Accounts” from the home menu.
2. Tap the “Map” button located in the upper panel of the accounts’ “view” column. Or select an account from the list and click on the map from the lower tab menu.
8.2. Add a new account

Follow these steps to create a new account:

1. Select “Accounts” from the home menu.
2. Tap the “+” button in the upper right corner.
3. Fill in the required details. You can also add the address when you change the tab at the bottom of the screen.
4. Tap the “save” button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
8.3. Edit accounts

Follow these steps to edit the details of an account:

1. Select “Accounts” from the home menu.
2. Select the account that you want to edit.
3. Tap the “Edit” button located in the upper right corner.
4. Change the details of the account. You can switch between Info, Address and Notes tabs in the lower tab panel.
5. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
8.4. View the account details

Follow these steps to browse the info of an account:

1. Select “Accounts” from the home menu.
2. Select the account that you want to browse through.
3. You see the basic info about the account. In the lower tab panel you can switch between several tabs to see more related info: Info / Map / Contacts / Quotes / Orders / More (Invoices, Activities and Notes)

8.5. Notes tab

You can find the Notes tab in the bottom panel of an account’s form. Here you can attach notes related to the Account. For example, tap on the photo button in the upper right corner to take a picture or record a video and save it. Or tap on the “+” button in the upper right corner to create a note with a description and attach a signature to it (you can draw on the screen here).
9. Contacts

9.1. Switch to a map view

You have the option to view the contacts on the map.

1. Select “Contacts” from the home menu.
2. Tap the “Map” button located in the upper panel of the contacts’ “view” column. Or select a contact from the list and click on the map from the lower tab menu.
9.2. Add a new contact

Follow these steps to create a new contact:

1. Select “Contacts” from the home menu.
2. Tap the “+” button in the upper right corner.
3. Fill in the required details. You can also add address when you change the tab at the bottom of the screen.
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
9.3. Edit contacts

Follow these steps to edit the details of a contact:

1. Select “Contacts” from the home menu.
2. Select the contact that you want to edit.
3. Tap the “Edit” button located in the upper right corner.
4. Change the details you want to. You can switch between Info, Address and Notes tabs in the lower tab panel.
5. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
9.4. View the contact details

Follow these steps to browse the details of a contact:

1. Select “Contacts” from the home menu.
2. Select the contact that you want to browse.
3. You see the basic info about the contact. In the lower tab panel you can switch between several tabs to see more related info:
   - Info
   - Map
   - Contacts
   - Quotes
   - Orders
   - More (Invoice, Activities, Notes)
10. Leads

10.1. Switch to a map view

You have the option to view the leads on the map.

1. Select “Leads” from the home menu.
2. Tap the “Map” button located in the upper panel of the leads’ “view” column. Or select a lead from the list and click on the map from the lower tab menu.
10.2. Add a new lead

Follow these steps to create a new lead:

1. Select “Leads” from the home menu.
2. Tap the “+” button in the upper right corner.
3. Fill in the required details. You can also add address when you switch to an Address tab at the bottom of the screen.
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
10.3. Edit leads

Follow these steps to edit the details of a lead:

1. Select “Leads” from the home menu.
2. Select an active lead that you want to edit.
3. Change the details you want to. You can switch between Info, Address, Activities and Notes tabs in the lower tab panel. If you cannot edit any field, you have selected an inactive lead which cannot be edited.
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
10.4. Browse the details of a lead

Follow these steps to browse the details of a lead:

1. Select “Leads” from the home menu.
2. Select the lead that you want to browse.
3. You see the basic info about the lead. In the lower tab panel you can switch between several tabs to see more related info:
   - Info
   - Address
   - Activities
   - Notes
10.5. Qualify or disqualify a lead

Follow these steps to qualify or disqualify leads:

1. Select “Leads” from the home menu.
2. Select the lead that you want to qualify or disqualify.
3. Tab the button in the upper right corner.
4. Select one of the options: Qualify, Disqualified - Lost, Disqualified - Cannot Contact, Disqualified - No Longer Interested, or Disqualified - Canceled.
5. Edit the options and hit “Save” button in the upper right corner of the pop-up window.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
11. Opportunities

11.1. Add a new opportunity

Follow these steps to create a new opportunity:

1. Select “Opportunities” from the home menu.
2. Tap the “+” button in the upper right corner.
3. Fill in the required details. You can also add products when you change the tab at the bottom of the screen.
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
11.2. Edit opportunities

Follow these steps to edit the details of an opportunity:

1. Select “Opportunities” from the home menu.
2. Select the opportunity that you want to edit.
3. Change the details you want to. You can switch between Info, Products, Activities and Notes tabs in the lower tab panel.
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
11.3. Browse the details of an opportunity

Follow these steps to browse an opportunity:

1. Select “Opportunities” from the home menu.
2. Select the opportunity that you want to browse.
3. You see the basic info about the opportunity. In the lower tab panel you can switch between several tabs to see more related info:
   - Info
   - Products
   - Activities
   - Notes
11.4. Convert opportunity to won or closed

Follow these steps to convert an active opportunity to “won” or “closed”:

1. Select “Opportunities” from the home menu.
2. Select an active opportunity that you want to convert.
3. Tap the button in the upper right corner and choose “Won Opportunity” or “Close Opportunity”. Deactivated opportunities cannot be converted. If you don’t see any button in the upper right corner and you cannot edit any detail in the opportunity, it means that the selected opportunity is deactivated.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
12. Quotes

12.1. Add a new quote

Follow these steps to create a new quote:

1. Select “Quotes” from the home menu.
2. Tap the “+” button in the upper right corner.
3. Fill in the required details. You can also add shipping address and products when you change the tab at the bottom of the screen.
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
12.2. Edit quotes

Follow these steps to edit a quote:

1. Select “Quotes” from the home menu.
2. Select the quote that you want to edit.
3. Change the details you want. You can switch between Info, Ship, Products and Notes tabs in the lower tab panel.
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
12.3. Browse the details of a quote

Follow these steps to browse the details of a quote:

1. Select “Quotes” from the home menu.
2. Select the quote that you want to browse.
3. You see the basic info about the quote. In the lower tab panel you can switch between several tabs to see more related info:
   - Info
   - Ship (shipping address)
   - Products
   - Notes
12.4. Get products from an opportunity to quote draft

Follow these steps to automatically copy products from an opportunity to a quote:

1. Select “Quotes” from the home menu.
2. Select a draft of a quote that you want to get products for. You can see whether a quote is a “draft”, “closed” or “active” in the bottom right corner of each quote record.
3. Tap the button in the upper right corner and choose “Get Products”.
4. Select an opportunity from which you want to copy products to the quote draft.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
12.5. Activate a quote

Follow these steps to activate a quote:

1. Select “Quotes” from the home menu.
2. Select a draft of a quote that you want to activate. You can see whether a quote is a “draft”, “closed” or “active” in the bottom right corner of each quote record.
3. Tap the button in the upper right corner and choose “Activate quote”.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
12.6. Set a quote to won or closed

Follow these steps to set an active quote to “won” or “closed”:

1. Select “Quotes” from the home menu.
2. Select an active quote that you want to set to “won” or “closed”. You can see whether a quote is a “Draft”, “Closed” or “Active” in the bottom right corner of each quote record.
3. Tap the button in the upper right corner and choose “Won Quote” or “Close Quote”.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
13. Orders

13.1. Add a new order

Follow these steps to create a new order:

1. Select “Orders” from the home menu.
2. Tap the “+” button in the upper right corner.
3. Fill in the required details (fields in red color like Customer, Name and Price List are required). You can also add shipping address and products when you change the tab at the bottom of the screen.
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
13.2. Edit orders

Follow these steps to edit an order:

1. Select “Orders” from the home menu.
2. Select an order with the status “new” that you want to edit. You can see whether the order has status of “New”, “Complete”, “Partial” or “No Money” in the bottom right corner of each order record.
3. Change the details you want to. You can switch between Info, Ship, Products and Notes tabs in the lower tab panel.
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
13.3. View the details of an order

Follow these steps to browse the details of an order:

1. Select “Orders” from the home menu.
2. Select the order that you want to browse.
3. You see the basic info about the order. In the lower tab panel you can switch between several tabs to see more related info:
   - Info
   - Ship (shipping address)
   - Products
   - Notes
13.4. Get products from an opportunity to an order

Follow these steps to automatically get the products from an opportunity to an order:

1. Select “Orders” from the home menu.
2. Select an order with the status “New” that you want to get products for. You can see whether the order has status of “New”, “Complete”, “Partial” or “No Money” in the bottom right corner of each order record.
3. Tap the button in the upper right corner and choose “Get Products”.
4. Select an opportunity from which you want to copy products to the order.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
13.5. Complete an order

Follow these steps to complete an order:

1. Select “Orders” from the home menu.
2. Select an order with the status “new” that you want to complete. You can see whether the order has status of “New”, “Complete”, “Partial” or “No Money” in the bottom right corner of each order record.
3. Tap the button in the upper right corner and choose “No Money” (to cancel the order), “Fulfilled - Complete” (when the order is completed), “Fulfilled - Partial” (when the order is partially completed),

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
### 14. Invoices

#### 14.1. Add a new invoice

Follow these steps to create a new invoice:

1. Select “Invoices” from the home menu.
2. Tap the “+” button in the upper right corner.
3. Fill in the required details. You can also add shipping address and products when you change the tab at the bottom of the screen.
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
14.2. Edit invoices

Follow these steps to edit an invoice:

1. Select “Invoices” from the home menu.
2. Select an invoice with the status “new” that you want to edit. You can see whether the invoice has status of “New”, “Complete”, “Partial” or “Canceled” in the bottom right corner of each invoice record.
3. Change the details that you want to. You can switch between Info, Ship, Products and Notes tabs in the lower tab panel.
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
14.3. View the details of an invoice

Follow these steps to view the details of an invoice:

1. Select “Invoices” from the home menu.
2. Select the invoice that you want to display and review.
3. You see the basic info about the invoice. In the lower tab panel you can switch between several tabs to see more related info:
   - Info
   - Ship (shipping address)
   - Products
   - Notes
14.4. Get products from an opportunity to an invoice

Follow these steps to automatically get the products from an opportunity to an invoice:

1. Select “Invoices” from the home menu.
2. Select an invoice with the status “new” that you want to get products for. You can see whether the invoice has status of “New”, “Complete”, “Partial” or “Canceled” in the bottom right corner of each invoice record.
3. Tap the button in the upper right corner and choose “Get Products”.
4. Select an opportunity from which you want to copy the products to the invoice.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
14.5. Set invoice to paid or canceled

Follow these steps to set invoice to paid or canceled:

1. Select “Invoices” from the home menu.
2. Select an invoice with the status “new” that you want to change the status of. You can see whether the invoice has the status of “New”, “Complete”, “Partial” or “Canceled” in the bottom right corner of each invoice record.
3. Tap the button in the upper right corner and choose “Paid - Complete” (fully paid and completed), “Paid - Partial” (partially paid), or “Cancel Invoice”.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
15. Products

15.1. View the details of a product

Follow these steps to browse the details of a product:

1. Select “Products” from the home menu.
2. Choose the product that you want to review.
3. You can see the basic info about the product (Name, ID, Product Type, Standard Cost, List Price, Quantity On Hand).

15.2. Add or edit products

New products can be added or edited using the professional version of Mobile CRM.
16. Cases

16.1. Add a new case

Follow these steps to create a new case:

1. Select “Cases” from the home menu.
2. Hit the “+” button in the upper right corner.
3. Fill in the required details.
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
16.2. Edit cases

Follow these steps to edit a case:

1. Select “Cases” from the home menu.
2. Select a case.
3. Change the details that you want to. You can switch between Info, Activities and Notes tabs in the lower tab panel.
4. Tap the save button located in the upper right corner.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
16.3. View the details of a case

Follow these steps to review the details of a case:

1. Select “Cases” from the home menu.
2. Select the case that you want to review.
3. You see the basic info about the case. In the lower tab panel you can switch between several tabs to see more related info:
   - Info
   - Activities
   - Notes
16.4. Resolve a case – Problem Solved or Cancel Case

Change the status of an active case to ‘Problem solved’ or ‘Cancel Case’. Follow these steps to resolve the case:

1. Select “Cases” from the home menu.
2. Select an open case.
3. Tap the button in the upper right corner and choose “Problem Solved” or “Cancel Case”.

Synchronize your device if you are in the offline mode, so that the new changes will be uploaded also to your CRM server.
Setup screen was designed to set up the appearance and functions of the Resco Mobile CRM application.

IMPORTANT NOTE: You have to tap the “save” button in the upper right corner and restart the application in order to see the changes you’ve made.
17.1. Turn on/off standard entities

In the Data tab (or in the right column for tablets) choose which entities can be accessed from your mobile application by turning them ON or OFF. This option is not a synchronization filter. All standard entities will be synchronized with your device but only those that are switched ON will be visible and accessible.
17.2. Online Mode

4 options to choose from:

- **Always** – app runs always in online mode
- **WiFi Only** – app runs in online mode when the device is connected to internet via WiFi
- **Manual** – user can switch between Online and Offline mode manually
- **Never** – online mode is always switched off
17.3. Auto Sync

4 possibilities:

- **Never** – auto synchronization is turned off
- **On Start** – app syncs automatically at the start of the app
- **On Change** – every time the user modifies something, the app will automatically sync the change
- **On Start & Change** – combination of both
17.4. Call Import (for Android only)

Turn ON or OFF the import of calls from your Android mobile device to your mobile CRM app. Then you can save incoming calls as call activities.

17.5. Map and Dashboard

Turn ON or OFF the map and the dashboard views.

17.6. List Buttons

Turn ON or OFF the default buttons such as Edit, More, Call or Email.

17.7. Max Attachment Size

Set maximum size of each attachment file. The value inserted is in Bytes.

17.8. Max Sync Records

Set maximum amount of records that will be synced for each menu item.

IMPORTANT NOTE: If you don’t see all your contacts, accounts, orders, etc. you need to increase this number. For instance: If you have 12,000 contacts for instance and this value is set to only 10,000, there will be 2,000 contacts missing in your app.
17.9. Sync Login (Background Sync)

If this button is switched off, the sync pop-up window won’t be displayed each time you will sync your app. The app will do the background sync and you will still be able to use your app even while it synchronizes with your CRM server.

17.10. Save Password

If this is set to ON, the app will not require the login information each time it is launched.

If it set to OFF, after restarting the app, you only fill in the password (if the user name stays the same) or all info (if the user name has changed).

17.11. Use CRM Email

If this is set to ON, emails sent from Mobile CRM will be sent using your Dynamics CRM server.

If this is set to OFF, emails sent from Mobile CRM will be sent using the default email client of your mobile device.

17.12. Use Reminders

If this is set to ON, your mobile device will show you reminders of your upcoming CRM activities.
17.13. Language

Change the language of the app from 16 available translations. By default it is set to Automatic, this means the app uses the language of your mobile device.

17.14. Phone App

Choose which application should be used for calling from the app – whether the phone or Skype (if installed). For iOS devices you also have the option to choose Facetime.

17.15. Display Density (for Android only)

Set up the resolution (DPI) for your Android device (tablet or smartphone) – from Low to Extra Extra High.
17.16. **Private Views**

If you created and saved your Private Views with Advanced Find, you can view or delete them all here.

17.17. **Change Server**

Shows the Sync login window. If you set the background sync, you can change the user login settings here.

17.18. **Delete Data**

You can delete your whole database from the app on your device here. All saved data and previously synchronized, can be then downloaded again with synchronizing the app with the server.

17.19. **Home Realm**

This is a system setup. No need to change anything.
17.20. Web Service
- Auto – standard setting
- Crm4
- Crm2011
- Xrm – if you have issues with synchronization, choose the Xrm option

17.21. Max Image Size (for iOS only)
- Default / 640 x 480 / 1024 x 768 / 1600 x 1200 / 2048 x 1536 / 2592 x 1936

17.22. Record Quality (for iOS only)
Select the quality of videos stored in note's section for iOS devices: Low / Medium / High

17.23. Private Calendars
If this is set to ON, your mobile device will show you push reminders regarding your own CRM activities. Also, you will be able to see the activities from your device’s calendar in the CRM app calendar.
18. About

In this screen, you can check which app version you are currently using.

If you ever encounter any technical problem with the app, you can use the “Send Log” option. This sends an e-mail to our support team, so they can inspect the issue and revert back to you.
19. Customizations

All the functions mentioned above are available in the free version of the app. The professional version of the solution allows you to change the app according to your needs.

You can add other details, fields and entities (even custom ones), create different versions for different users, change the appearance (colors, images, etc.), show other records on the map, and lots more.

Check out how to get this easily done with the customization tool Woodford.