100+ Amazing things
you can do with Microsoft Dynamics CRM on your phone and tablet

resco.net
technology on the move

Introduction

Why did we make this book?

When we started working on this book, we had two goals in mind:

1. We want to show people how cool a mobile CRM client really can be
2. We want to provide a list of cool things you can get inspired by

Every day, we are approached with the question: "So, what can the app do?"

And it's really hard for us to spill the answer in one breath. There's just so much you can talk about. It's not a question of 2-3 benefits, there's hundreds of them! Therefore, we decided to put it all on paper (electronic one) and put it out there–to intrigue and to educate.

Whether you are new to Mobile CRM, or you have already adopted it, this book will help you find out more about this topic. We wanted to provide you with a **complete resource of things you can do with a CRM on your phone or tablet**. Often it's hard to shout out every single thing via a website or on a blog–it can also be often overlooked. So an e-book seemed a very efficient way to get the info out there. It allows you to read the whole thing or just skim through the parts that catch your eye.

Either way, hopefully, while browsing through this book, you'll stop and say: "**Wow, I didn't know we can do that! How cool is that?**" And that's exactly what we wanted to accomplish.

Who is this book for?

This book was written for the Microsoft Dynamics CRM ecosystem. Namely:

- Companies looking for a mobile client for Microsoft Dynamics CRM
- Microsoft Dynamics CRM consultants who want to extend their knowledge in the area of mobility
- Existing Resco Mobile CRM customers and partners
- Competition in the Mobile CRM market–let's improve together for the benefit of the customer

While writing this book, we tried to keep things **simple**. Meaning we tried to describe everything in a very conversational tone of voice, so everyone can easily follow the topics and remember them for later.

We avoided, or tried to avoid, technical terms that only a small portion of the CRM community understands. Why? Because we think CEOs, Sales Directors, Field Managers, Account Executives and Marketing Specialists should also be able to see the business opportunities Mobile CRM has to offer.

That being said, we are not excluding technical folks out there. They'll be able to go through this book and while reading things like "Find contacts on LinkedIn", their minds might immediately translate the title to "pass field parameters in a URL".

If you find yourself wanting to implement a certain aspect and not knowing how because of lack of technical description in this book, just reach out to our support team via e-mail. They'll know exactly all the technical details behind each feature covered in this book.

This book will answer these questions for you:

1. What are the benefits of mobile CRM?
2. Does it pay off to invest in a mobile CRM solution?
3. How can we use a CRM app in our scenario?
4. How can we improve our current mobile solution?
5. What is there to know that I don't know yet?

Section 1
Access to vital information

#1

Get access to Microsoft Dynamics CRM from a phone or a tablet

Let's start with the basics. Having access to your CRM system from a phone or a tablet is, of course, the most obvious benefit of any mobile CRM solution. But let's take a moment to appreciate truly its benefits.

Mobile CRM will give you around-the-clock access to your CRM system, so you can be productive whenever and wherever you happen to be. With Microsoft Dynamics CRM in your phone and tablet, you'll have the info you need with you at all times. You'll be prepared for every sales pitch, every call or even an unexpected meeting.
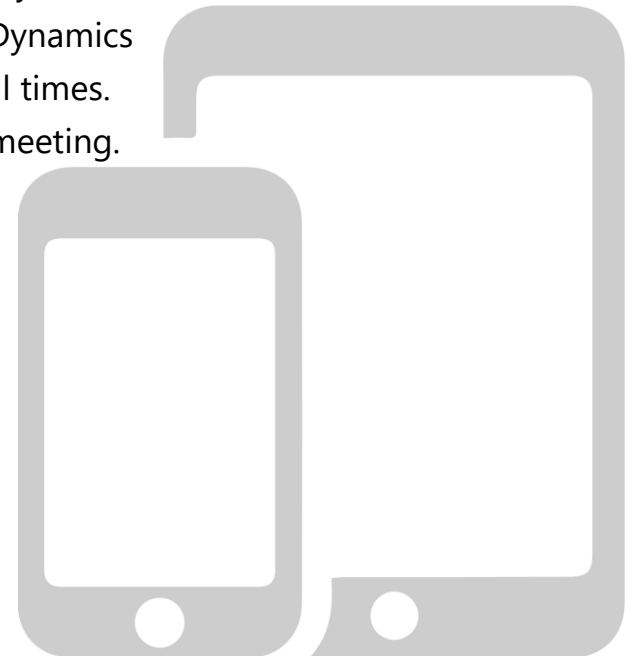
#2

Change the way you work. For good.

Ditch the computer and free yourself from a static workplace. Meet customers where they are. That's where the real action is.

This possibility to access the desired information whenever you want will greatly ease your job. You can work with your data wherever the road takes you. Your prep time for meetings will be significantly reduced. It will become only a matter of a few clicks right before the meeting starts—you'll have a perfect overview of the client, the details on previously discussed topics and information on what they need.
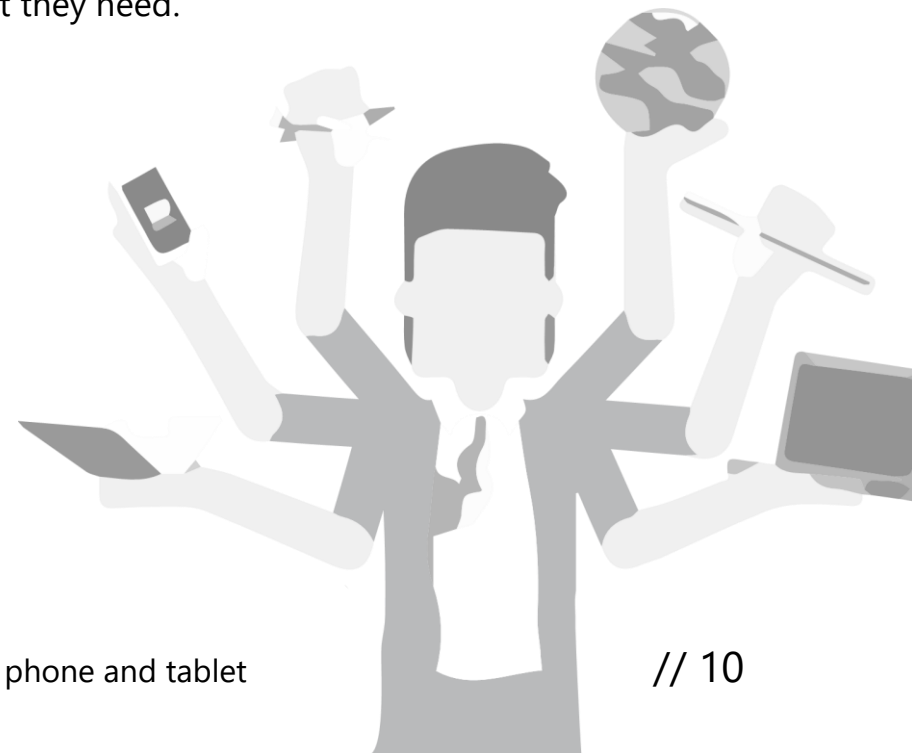
#3

Increased productivity with less effort

Working with your smartphone or tablet is both, easy and fast. Your job will be done in a fraction of the time you are used to and you'll have spare time for the important stuff.

One of the reasons why mobile devices increase efficiency is that we can use them when either traveling or waiting for on-site meetings. We can simply use the spare time to enter the data or send a follow-up.

Some of our Resco Mobile CRM customers told us that each sales and service guy now saves around an hour or more a day. A whole HOUR! That's a lot of money if you picture it as a portion of their salaries. That hour can be spent with a customer. And that's what makes the difference.

Mobile CRM is an investment. An investment that increases productivity and facilitates faster and more informed decision-making.
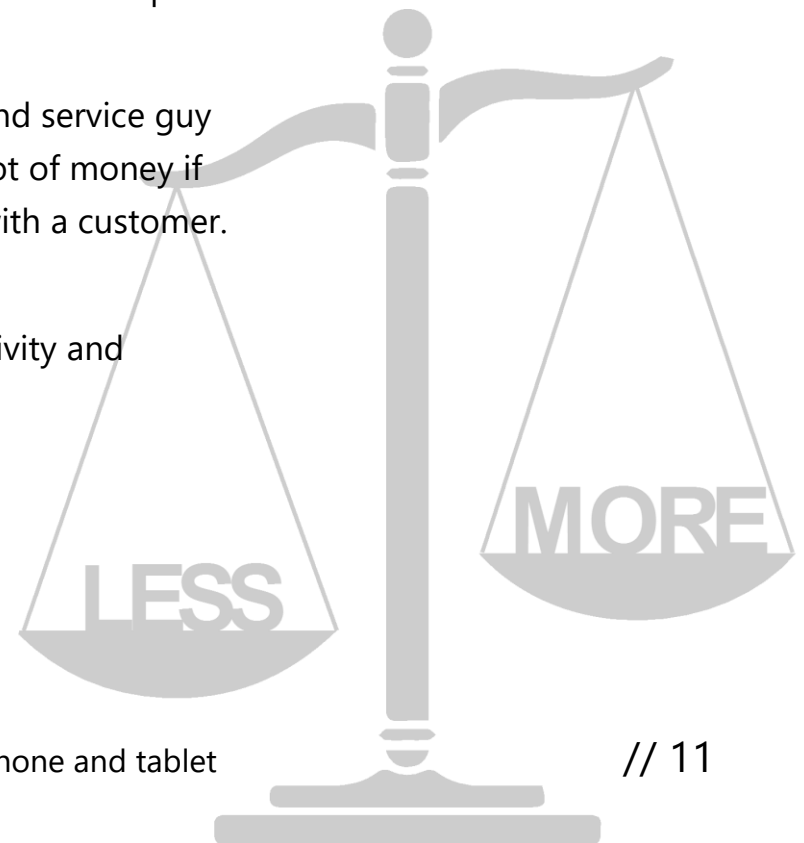
#4

Work smart, work offline

Who needs to work offline in this era of wide Internet coverage, right?

Well, you can't always rely on having uninterrupted Internet access. Occasionally, there will be underground parking lots, rural areas, even some buildings that will prevent you from accessing your CRM data when you need it the most.

Offline capability means you are working with the data stored on your device (tablet or phone). You can view, edit and manage the data, so functionality such as *'qualify a lead'* or *'create an order'* is not lost to you.

Besides, online access isn't that great as it pretends to be. Whenever you work online, you are connecting to a remote database (located on the server). Hence all data operations are slower, costlier and potentially risky (depends on the quality of the Internet connection). Online working leads to increased Internet traffic (the same data is sent back and forth again and again), the not-so-optimal responsiveness of the application and shorter battery life.
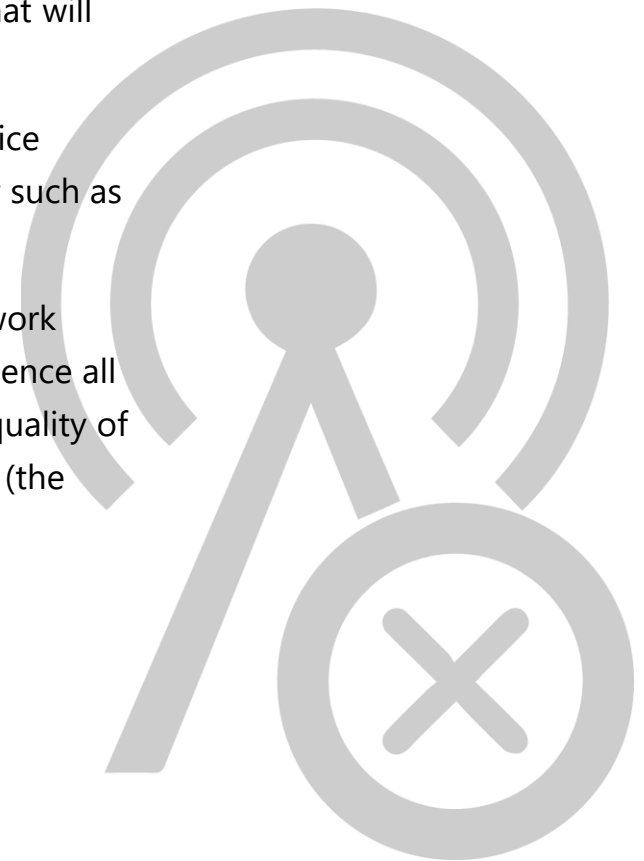
#5

Stay on top of the food chain

It's a jungle out there! Your competitors are after the deals you'd like to win. Your customers expect a faster and better service... Unless you have the technology, it's going to be hard to keep up.

During the first half of the 20th century, firms used to track the sales with pen and paper. Because knowing the customer data did, does and will shape the business. Later on, the Rolodex, a desk accessory with a unique ability to spin through index cards was used by tons of businesses. It may sound ridiculous nowadays, but Rolodex would allow you to add customers while updating existing customer information, details and more. Useful, but once you start growing, no Rolodex in the world can save you. So CRM on desktop computers came to be and that was great. But times have changed and now tablets, phones, and wearables are taking the center stage.

#6

Tablet or phone? Why not both?

You can use as many smartphones or tablets as you wish to (or more likely - as many as you have). Want to make phone calls from a smartphone, but create orders on your tablet? Go ahead.

But aren't tablets and phones just expensive toys?

It's easy to assume that phones and tablets given to employees will be mainly used for non-productive activities such as gaming, social media, YouTube... But given the opportunity, employees prove time and time again this assumption is just plain wrong. People value the investment in them, plus they find Mobile CRM really useful. And if something is useful to you, you are likely to use it.
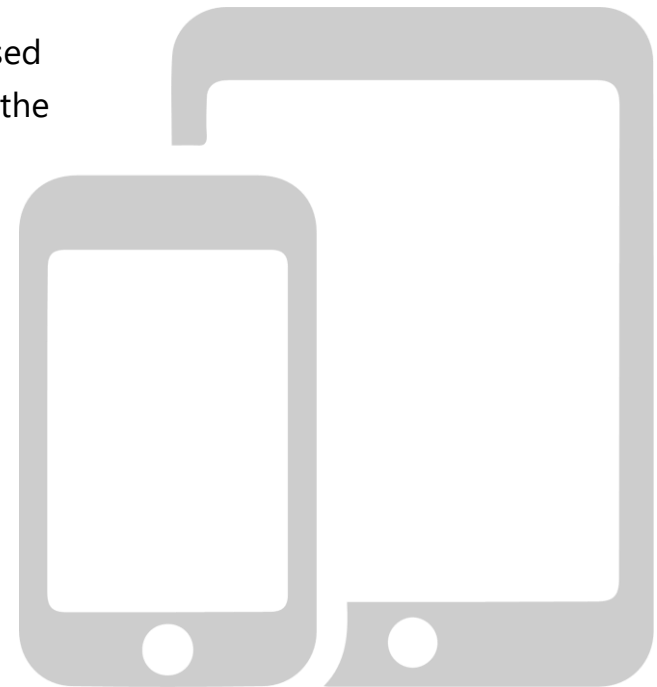
#7

Take your pick

Deciding what smartphone or tablet to buy next? Feel free to choose whichever. Your CRM app will work on all because Resco Mobile CRM is platform independent. Which is really just a fancy way of saying it works on iOS (iPhone & iPads), Android and Windows-powered devices.

People are used to certain systems. Hell, they even sometimes have really strong opinions when it comes to which one is the best. But let's not stir up the conversation. Everyone can have what they like and feel comfortable with. Provided it's not Blackberry. In that case, it's time for a change.
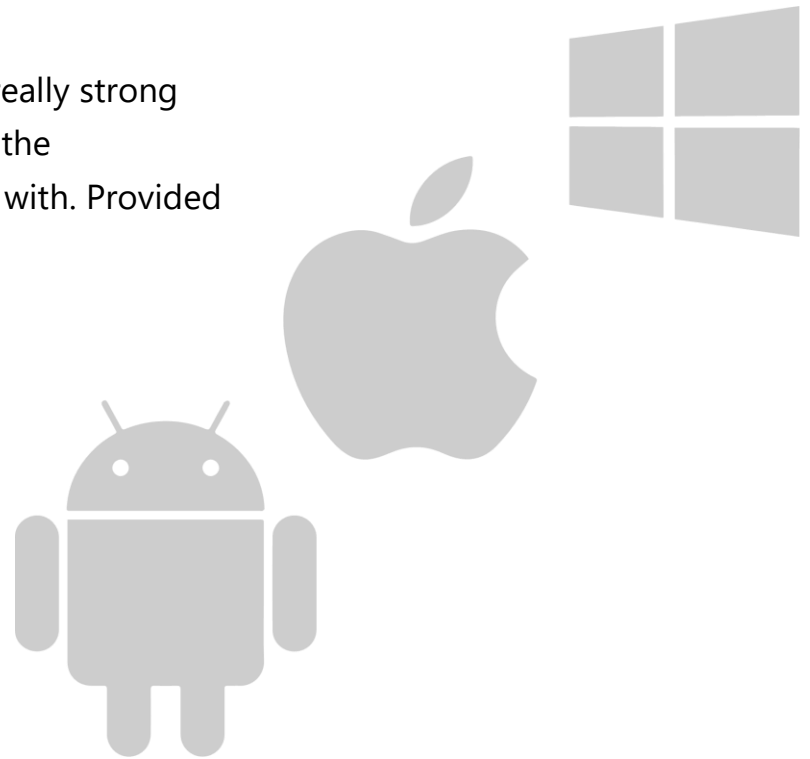
#8

Leave your worries behind

Having your Dynamics CRM data in a mobile app can be a scary thing. After all, how sure can you be your data is safe?

Pretty sure actually. We go above and beyond to ensure your information is safe & secure. From securing the database with the highest encryption standard to giving you the option to lock the application or wipe out data from it should something unexpected happen. And you can do it all remotely, fortified with push technology.

Still not convinced? There's always the option to opt for a Mobile Device Management tool (like MobileIron) that will take control of what's happening to your data at all times.

Section 2
Sales

#9

Increase sales

According to Nucleus Research, adding social and mobile access capabilities to CRM increases the productivity of sales reps by 26.4%. According to some responses we got from our customers, each of their sales reps saves, at least, an hour daily—that is an efficiency increase of 14.28%. Even these results are still amazing.

We can certainly argue about these numbers. They might be lower, let's say 12% or even 10%. They can also be higher. But the important thing is: **mobile CRM increases the efficiency of sales people by drastically reducing administrative tasks and producing value at the time which would have been normally unused**, such as traveling or waiting for appointments. So they have more time to spend doing what they're good at: selling.
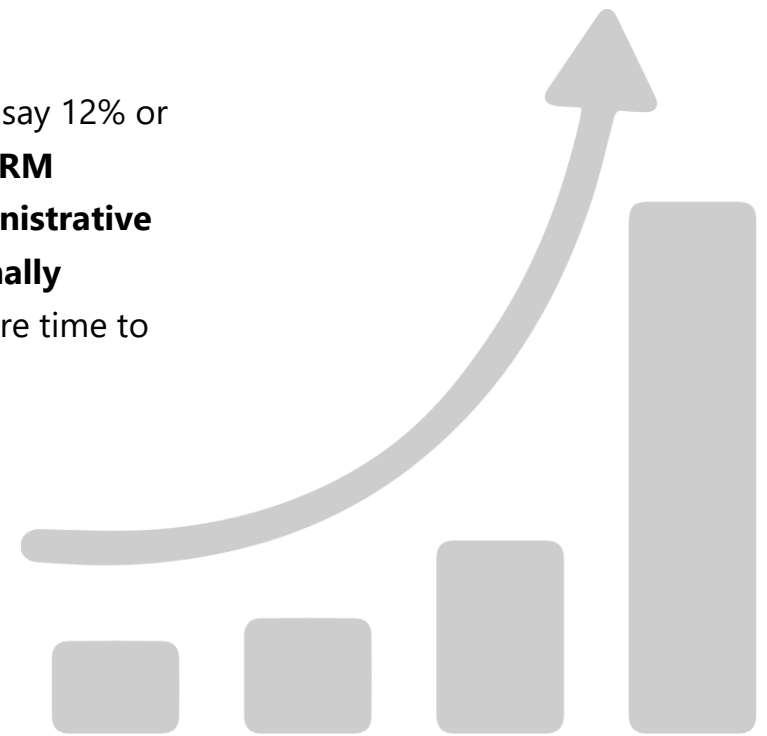
#10

Improve customer relationship management

The goal of each CRM is to build relationships with customers. Even the name itself—Customer Relationship Management—points at its purpose. When you have all obtainable information about your customers in one place, you can start analyzing their habits, purchases, and preferences. Hand in hand goes improved customer relationship and increased revenue.

But what good does it do if you can't get to this info quickly when you need it?

Mobile CRM will give you uninterrupted access to valuable information about your customers, so you can look it up in any moment of need.

#11

Increase customer retention

Not all customers are created equal. Various studies have already proven that loyal customers are more profitable than new ones. So how do we keep the customers we have? We keep them happy. And this strongly correlates with the level of service we'll provide and the type of relationship we'll build.

Of course, each business is different, and its customer retention strategies vary. They can incorporate all sorts of things - ranging from optimizing how quickly a service ticket is answered to how often does the account manager check in with the customer to see if everything's running smoothly.

Mobile CRM is a tool that can help you improve customer retention with consistent follow-ups. You can see what customers are in your area, so you can pay them a quick visit. You can check the status of raised cases before a meeting to show you're keeping an eye on the progress. You can...
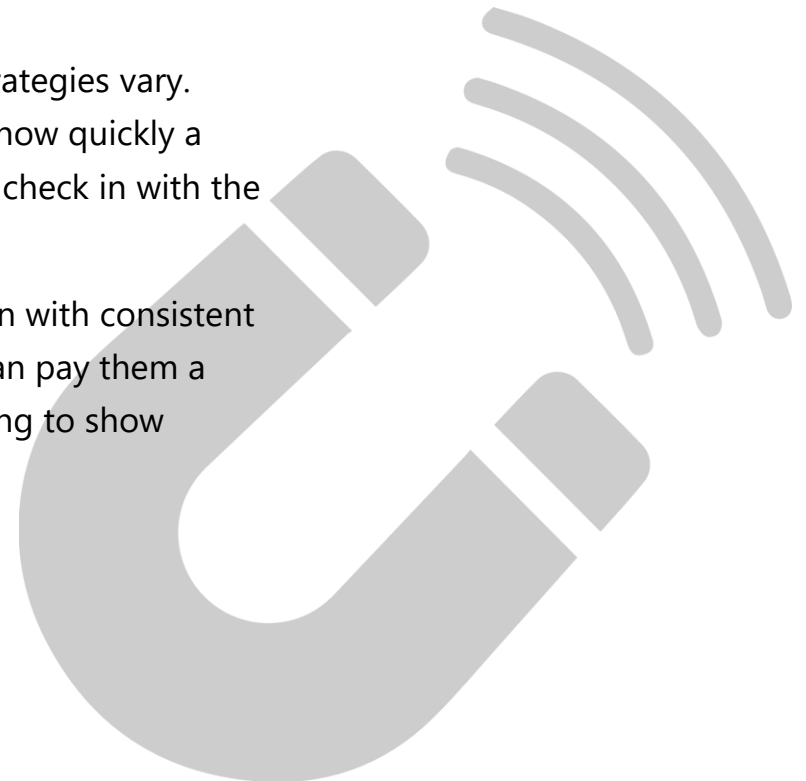
#12

Sell in the now

Have you ever shopped online? Chances are you have. And chances are you preferred those shops that display the price of the product and its availability in stock right there and then. People simply don't like not knowing this info and don't have the time or will to fill in the inquiry form and wait for a response. So why do that to your clients?

No more "I am not sure, I'll check with my colleagues and let you know" or "let me send it to you via email once I get back to the office". Info of products in stock, orders to be signed, product documentation that explains the ins and outs...all is available to you right there and then—when it matters.

#13

Take notes after the meeting

During every sales meeting, your sole focus should lie on actively listening to what your customer has to say. Of course you want to preserve this knowledge for later—after all, asking the customer what was already said is a no-no in every professional sales rep's book. The best way to preserve as much as possible is to take notes immediately after the meeting. However, this can get tricky, especially if you have very little time because you need to hit the road to get to your next appointment.

Mobile CRM allows you to take notes right as you walk out of the meeting. In fact, you might be quick enough to do it as you wait for the elevator.

Point being—when you take notes right after meetings via your mobile CRM app, you are less likely to forget something important, and you don't need to think about typing in meeting notes into CRM at the end of the week when half of your memories get already fuzzy.
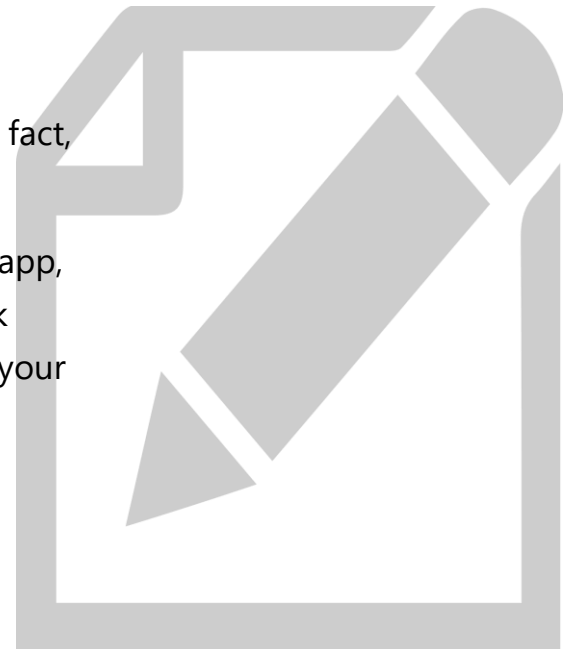
#14

Make a good impression

How would you react if you had a meeting with a sales representative and he comes in equipped with an old notebook that looks like it is at least 10 years old? Would you comment on it? Unlikely—you'll probably move on with the meeting, thinking something's odd. Would you feel like this person and the company he represents is modern? Probably not.

Now image this person coming in with a thin tablet, swiping through the screens, showing you presentations and taking notes without disturbing the flow. Would that impress you? Maybe. Would you feel confident of the modern approach of the company? Probably—it certainly won't harm its reputation.

The fact is: image sells a lot! We tend to buy things we like and find attractive, not necessarily those that better serve the purpose. So add to your value offering a little nudge—modern technologies that make an impression on your customers.
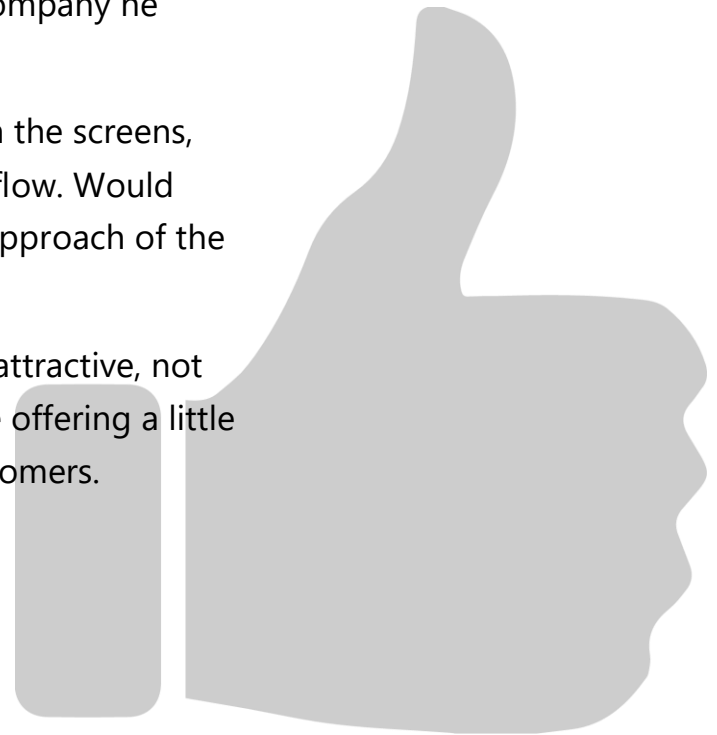
#15

Quickly interact with clients

A good salesman knows that to maintain good relationships with clients, one has to respond to their queries as quickly as possible.

Mobile CRM will give an echo to a salesman at the precise moment the customer tries to reach him. Whether it's in the form of an email, phone, lead in CRM or other means. Set up notifications, track phone calls, and email communication and stay in touch with your colleagues via chat and you'll never miss important updates.

But it's not only about how fast you can respond. It's also about how accurately you can do it. Mobile CRM will allow you to access immediately the insights from your CRM system, so you can get the information you need as you go. No need to delay your response for later.

#16

Improve lead management

How will one know when's the right time to contact the customer? It's easy. It's when the customer is reaching out to you.

Even Forbes says the odds of contacting and, in turn, qualifying a lead drastically decrease in time. That is why they advise companies to contact their leads as soon as possible, best within 30 minutes of the lead creation. With Mobile CRM, you can alert your sales reps of new incoming leads, so they can get to them while they're hot.

#17

Know how to get there

On your way to meeting a prospect? Or planning a whole day of customer visits? The map shows you where to go and how to get there. Mobile CRM app gives you directions to Accounts, Contacts, Leads or other chosen locations. You can even plan multiple appointments with the handy route planning.

You won't get lost and more importantly, you'll be on time. And who doesn't like punctuality?
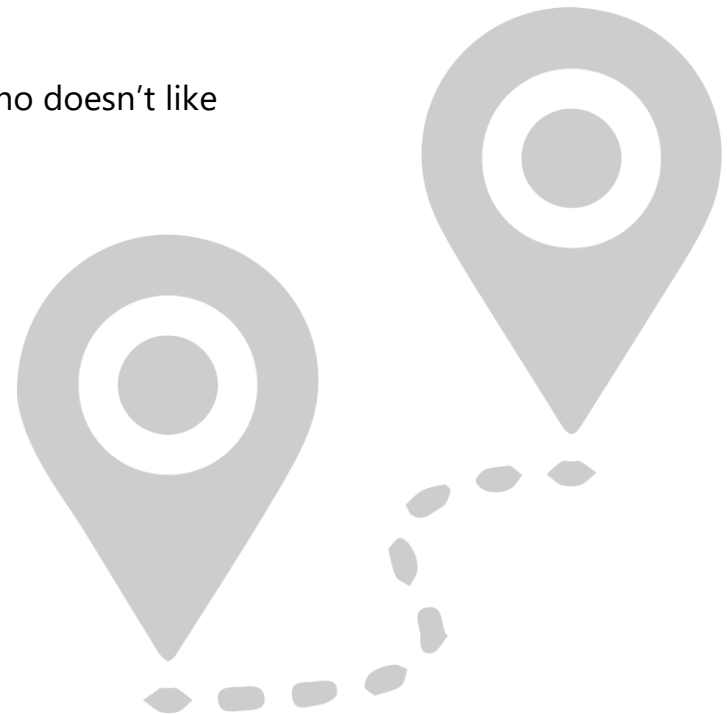
#18

Identify opportunities near you

Got some spare time between meetings? Catch up with a customer closest to your location. The map shows you your current position, and you can easily zoom in and out to see which of your customers and prospects are nearby. Then it's just a matter of calling one and stopping by for a quick visit if they're available. Plus, it's also a nice gesture to call someone up just because you're in the area, and you happen to be thinking about them.

#19

Sell with stunning presentations & interactive demos

People just love visuals! But who wants another stack of brochures they'll never go through? Charm your customers with stunning product presentations you can swipe through and zoom into. Include animations and short video presentations and you got yourself a winner! All within the app, of course. Those pretty, moving, colorful things you can showcase might just be the tipping point that gets you from "maybe" to "where do I sign?"

Section 3

Improving processes

#20

Improve data quality

Data is the cornerstone of any CRM system. Without it, or more accurately without good quality data, there'll be no customer insight and forecasts. Many companies struggle to keep their data up-to-date, accurate and plentiful. And boy, is this a struggle.

Luckily, according to a survey that reveals major CRM Buyer Trends for 2015 conducted by Software Advice, Mobile CRM greatly or moderately improves the quality of data. 53% of the salespeople say that thanks to the access to their CRM system on their tablet or smartphone, they noticed a great improvement of the quality of CRM data and another 29% says it moderately improved the quality of their data. Only 18% of the respondents thought there was minimal or no impact of Mobile CRM.
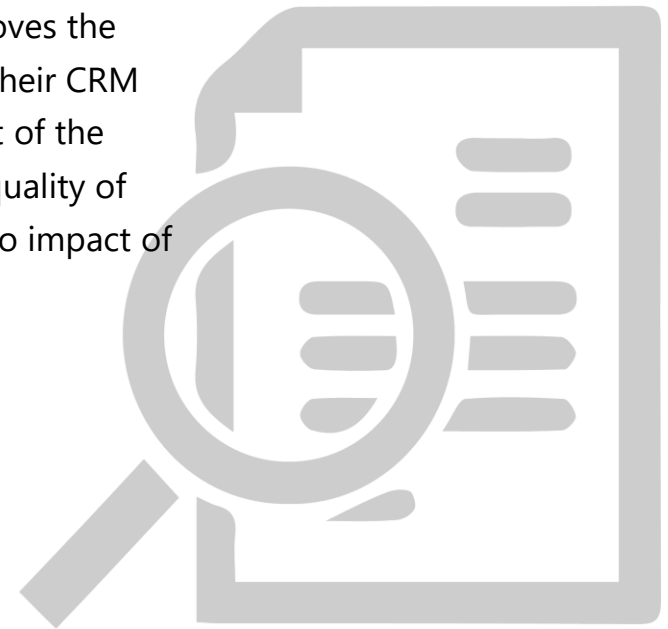
#21

Increase user adoption

One of the biggest challenges of any CRM implementation is the user adoption. Translation: "Will the users actually use it? If not, we've just wasted money."

The adoption rate of CRM tends to be low because A: the CRM system is difficult to use, B: people don't see real value in it and C: people find it hard to change.

Now consider this: You can address the issue A and C with mobile CRM! A bit of B as well. How?

Spoiler alert: **People are used to having phones and tablets.** It comes as a second nature to us: we wake up and the first thing we look at is not our partner sleeping next to us, but our phones. Sad, but true. Phones have so deeply impregnated our lives; we don't go a day without them. Why should it then pose any problem if you give people a mobile access to the CRM system? The opposite is to be true– employees who get mobile access to CRM are likely to adopt faster and use it more.
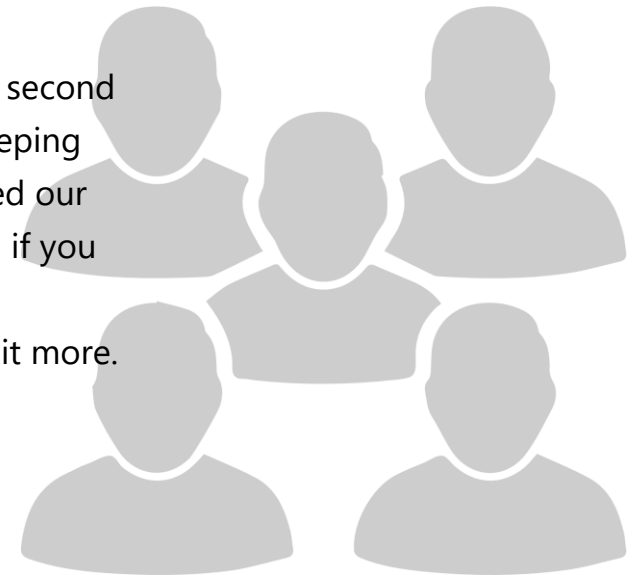
#22

Let the app do the work for you

Wouldn't it be nice to let the app do the work for you? Or, at least, parts of it? With an intelligent set of rules, you can automate tasks that take up your time or occupy your mind. For example, the delivery address can be already pre-filled when you create an order for an existing customer. Or a record will not be saved unless it's filled in correctly.

Let the app take up the mundane tasks that can be automated with rules. These save you time & ensure the data is correct.
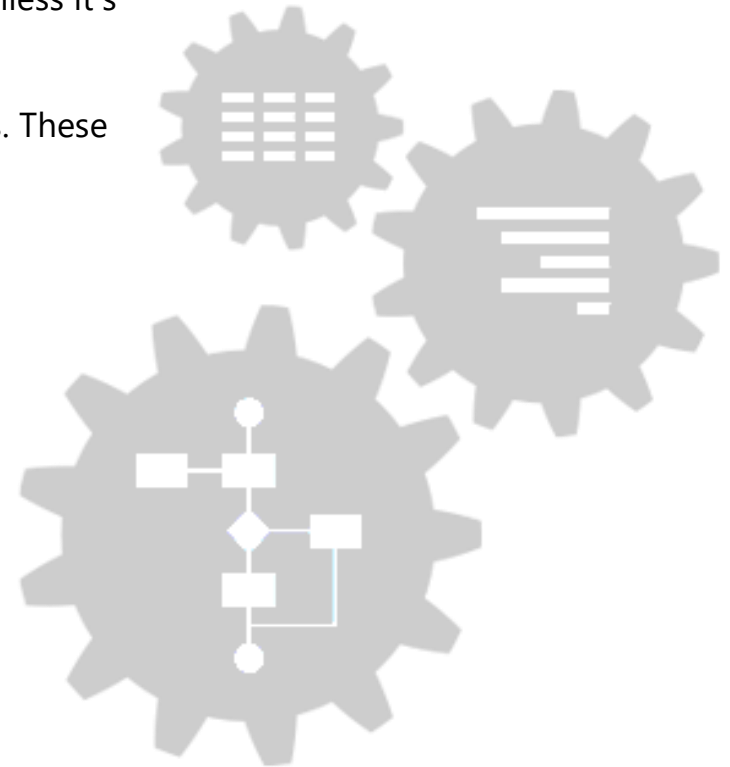
#23

Utilize business process flows

Business process flows were one of the major additions in Microsoft Dynamics CRM 2013. It is a guideline that navigates users from point A to point B (for example from new lead to closing a sale). And they are available in Resco's mobile CRM client as well. You can work the same way as you would on the desktop, using your process flows from Dynamics CRM. No shortcomings for mobile users.
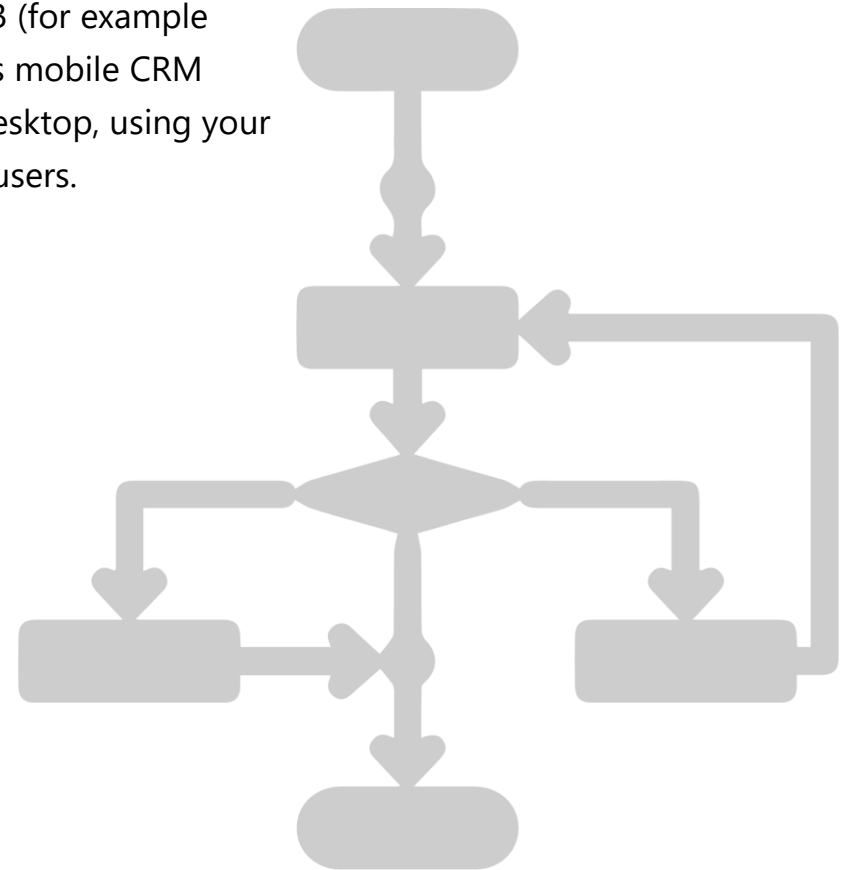
#24

Get the product to the customer faster

How long does it take for you to process an order? A day? Two to three days? How about a couple of minutes? That's the possibility a Mobile CRM offers.

Instead of sending the orders back and forth between the sales rep and the customer, your sales reps can create the order right during the meeting with the customer, have it verified and signed on the spot and sent it back to the office for order processing with a click of a button. Whoosh, on the way to the customer the product goes.

With an instant gathering of orders from field workers, you can shorten the life cycles of orders and get the product to the customer faster than ever. And that's something worth investing into.

#25

Scan barcodes to get more info on the product

Say you are a pharma sales rep and you are talking to a pharmacist about a new range of products. You can give him the talk, but you can also step it up a notch and show off the medical study results and other supportive material to help your sale. You don't need to carry these with you or search for them manually in a large database of online documents. Instead, simply scan the barcode on the packaging and have the right information available in a blink of an eye.

After you get a go from the pharmacist, use the same approach for drafting an order—you scan barcodes or QR codes to add simply the products to the order. This speeds up the process as you no longer have to browse through them in a long product list and it prevents you from making mistakes by picking up the right product instead of accidentally selecting a similarly-named one.

#26

Run reports as you go

Gain meaningful insights from your CRM data utilizing the Run Report feature for individual records. Mobile CRM fetches the reports from your Dynamics CRM server to be viewed in the application as a PDF file. You can select a different report from the list of available reports (provided there's more to choose from).

#27

Scan badges of event participants

Organizing an event and need to scan badges of its participants as they go into sessions? Or are you attending an event as an exhibitor and want to scan badges of prospects visiting your booth? You won't need to type them into CRM from gathered business cards or import them once you get back to the office and have the time to catch up on things. You can simply scan the code on the badge and voilá--the record pops up in the CRM system. Your colleagues at the office can immediately see the lead and can quickly follow up so that the requested info will be waiting for the prospect in inbox before he or she leaves the event.

#28

Manage activities of your employees

Managing people is not an easy task as it is. And if you happen to be a manager who is often out of the office, you've got even more work cut out for you.

With Mobile CRM, you can stay on top of things, even if you are not present in flesh. You can assign activities to your employees, oversee the day-to-day processes and quickly react to all situations. Mobile CRM is going to give you valuable insights into your business, so you can handle the complex task of managing people a bit easier.
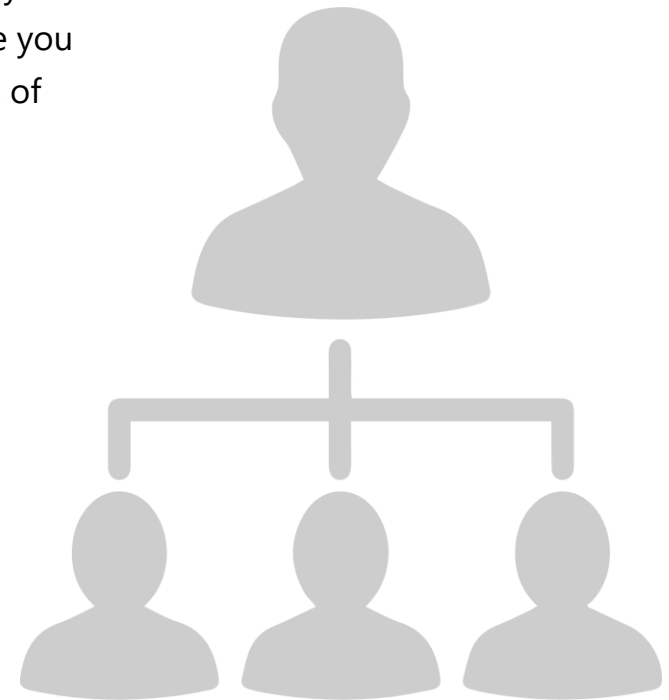
#29

Print documents

Even though Mobile CRM allows you to go paperless, there are still occasions in which the good old paper still serves a purpose.

Let's say you want to print a contract for your client to sign while you are still at the venue. Or you want to print out a certificate, warranty or a price list. You can do it all from your tablet or phone. You can open the attachment directly in your Mobile CRM app and hit Print. The good news: You can print from anywhere. The other good news: As most printers support wireless printing nowadays, it's not as hard to set up as you might think.
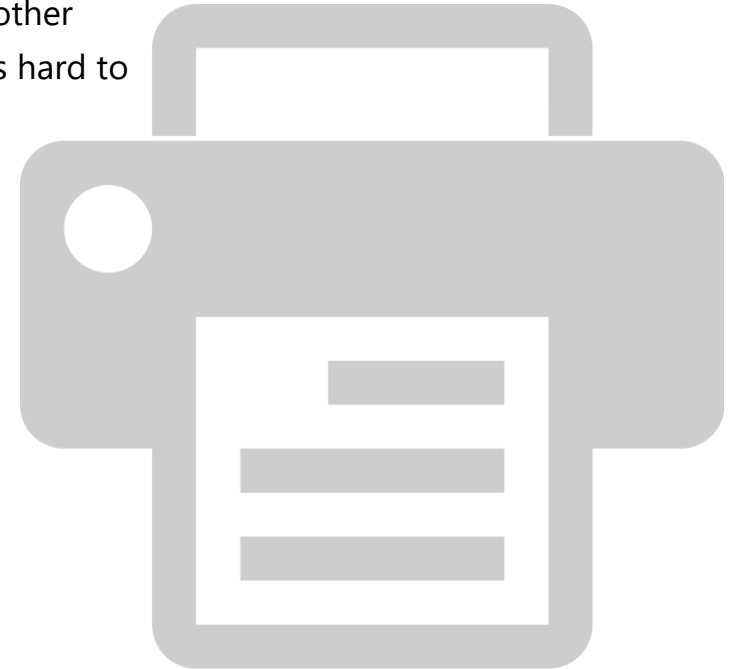
Section 4
Engagement

#30

Provide added value to customers

A Dynamics CRM application doesn't have to be for employees only. Resco Mobile CRM gives you also the option to create a mobile application for non-CRM users, such as your customers, agents, business partners or volunteers.

Remember when in 2009 Starbucks introduced its app? With a single wave of your phone, you pay for your latte and collect loyalty points. Those are easily trackable, and the app even notifies you when new rewards become available.

Numerous businesses have since followed suit. An app is an effective way to provide your customers with added value. Whether it means a unique discount offering or a supermarket app that improves users' social life—the benefit provided to users can be virtually anything.

#31

Promote products

I need to have a 'sexy' product for people to want to download my app.

Yes, it certainly is easy to imagine what your consumer app would look like, if your company is selling beer, cosmetics or weight-loss programs. But it's much harder if you are a manufacturer of pet food, a financial consultancy company or a provider of security services. What gives?

Usefulness! Usefulness beats sexy in a mobile CRM scenario. How? Because people will want an app that makes a tedious process easy. Your customers might make an order via your portal, but for that, they have to sit down at their computer and painstakingly fill it in from an already filled in paper sheet. Not good. Give them an app, so they can do it from their phone as they go and they'll thank you for it.
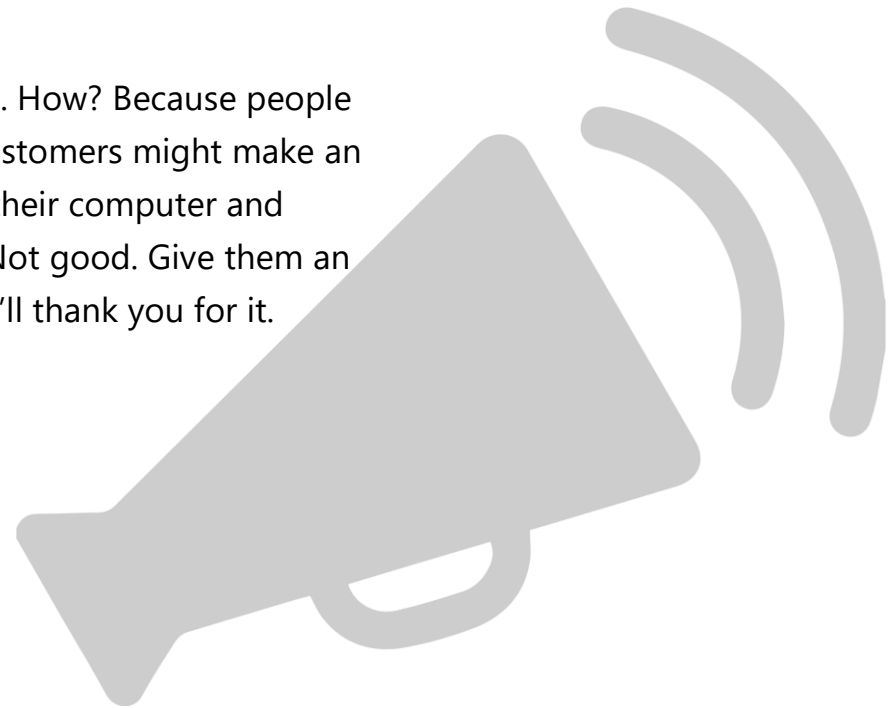
#32

Strengthen engagement with your customers

An app is an ideal platform to communicate with your audience. Interact via a public wall or private chat. Showcase your products or respond to any issue immediately. And utilizing push notifications is an elegant way to let users know there is something new worth checking out. Furthermore, the app can be also the starting point for the user community to connect not only with your business, but with each other as well.

#33

Build brand awareness

An average American spends 162 minutes a day on his/hers mobile device based on the study conducted by mobile measurement and advertising platform Flurry. Competing even with the time spent watching TV. Although your app might not be used all that time, the user still has to unlock, scroll and look through his phone or tablet to find the one he's currently looking for. And as we know, our brain subconsciously records all the visuals it comes across. From icon to a user interface, a well-designed app that packs the features your clients love boosts your business' recognition.

#34

Stand out from the crowd

Many businesses still don't have their own app. Offering one is still a way to differentiate yourself from the others. Combined with a unique added value and a wider exposure for your products and services, it can make the difference that gets you the deal you're after.

#35

Let your true colors shine through

You can change the graphical appearance of your app as you please. It's your golden opportunity to create an app that reflects your brand identity or personal color preference.

Why would you want to brand your app?

The app can mirror your corporate branding, your identity to ensure consistency. It can also help user adoption by providing them with something that looks great and feels familiar. And, as a bonus, your marketing department will be thrilled.
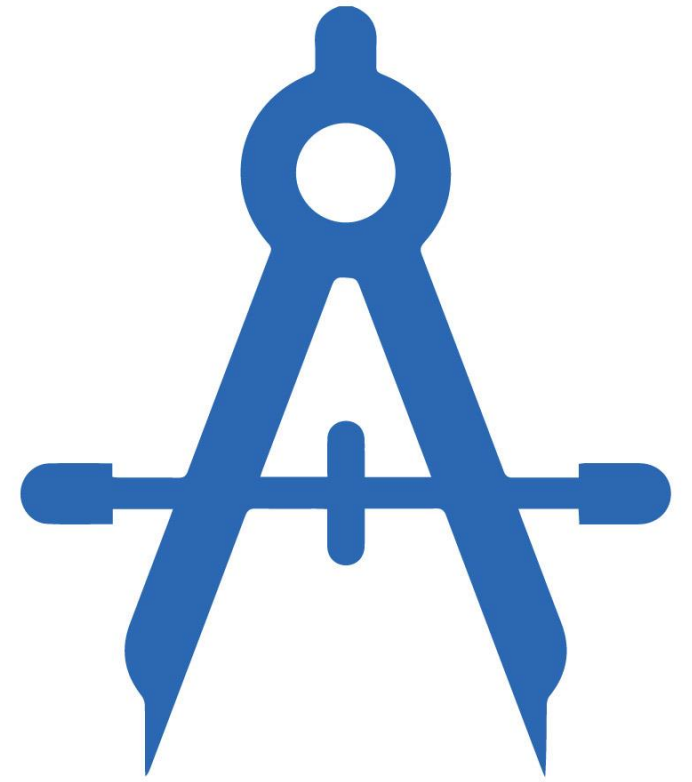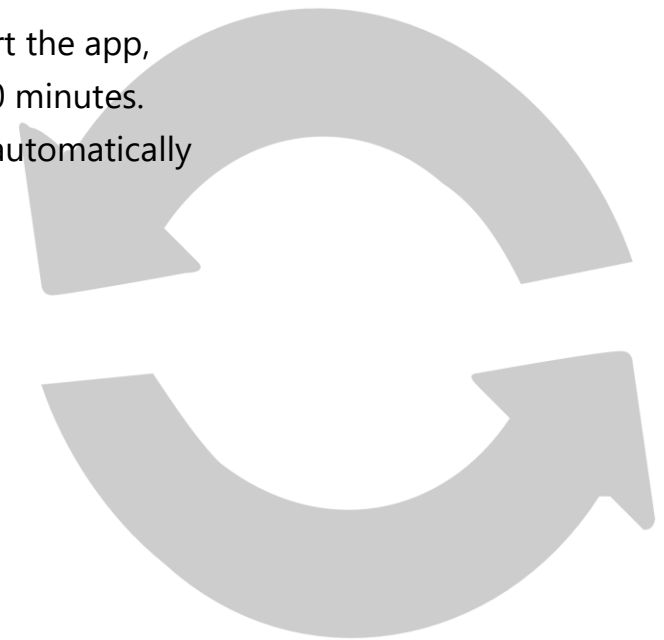
Section 5

Accuracy

#36

Preserve your work as you go

Working on a mobile phone or a tablet is convenient, yet there's still the lingering feeling of: "What if something goes wrong and I lose the data I have saved?"

If you want to take your mind off the manual synchronization between the application and the server, turn on the automatic synchronization that runs in the background—you won't even know it's there.

Automatic synchronization in Resco Mobile CRM kicks in when you start the app, when you change the data, or after a defined period—let's say every 10 minutes. You don't need to think about synchronizing anymore; it can be done automatically for you.

#37

Ease your mind during data transfer

Worried about losing your data during the process of synchronizing it with the server? After all, who can guarantee that the Internet connection will remain stable or that some other gnome won't get in the way? To address these concerns, precautions have been made. These synchronization precautions would not close an opportunity, quote, sales order or invoice if details were not synced successfully.

#38

Run JavaScript in the mobile app

Enhance your Mobile CRM application utilizing JavaScript. Use it to set up forms that dynamically react to user actions, validate input or do advanced calculations. Run your code in the mobile app whether you're online of offline.

#39

Sign here, please.

Picture this: You receive a package, and the delivery guy asks you to sign for the delivery at the door. Not an unusual situation.

Now picture this working for a company that uses Mobile CRM: Its service employees install electric garage doors for a new customer. Everything looks OK and the satisfied customer verifies this with a signature—on the tablet one of the service guys carries around. The company gets and echo of yet another installation completed on time and can save the documentation for later use. And, if anything occurs, the signature can be used as a proof of approved installation.
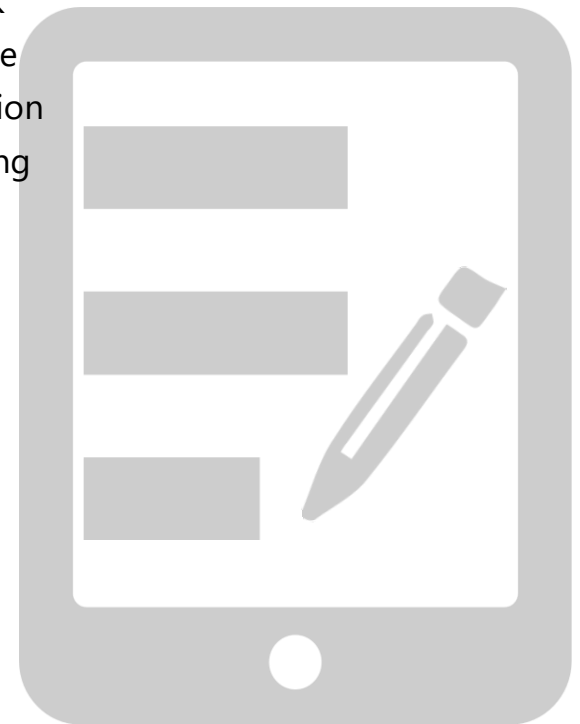
#40

Verify it with your signature

A very common scenario for a mobile CRM usage is inspections. Employees go in, take a look at what needs to be verified and then fill in the inspection form.

Let's say you are a car insurance agent that visits a client who claims to have damaged headlights after a crash. You inspect the vehicle and answer 'yes' to the question "Is the car damaged?". Immediately a new window appears, asking you to snap a picture of the damage. As you send the report to the back-office for processing, the app asks for your signature to confirm that you have verified the client's claim. Everything is streamlined and easy to follow.

#41

Switch to paperless inspections

Give your inspectors a handy gadget. Whether they do preventative or damage inspections, they can easily perform their inspections on sites without needing to carry tons of papers.

Not only will they get updated on each new inspection on their to-do list, they can also easily navigate to the site, fill in checklists, capture photos of the current condition, save their GPS position as a proof of actually being on site, verify the outcomes with signatures and get the final report to the back-office in a matter of minutes.

#42

Simplify your search with filtered lists

Let's assume your company sells a lot of products, each in one of the 3 main categories: Detergents, Cosmetics & Baby Care. And your sales reps want to note down which product each customer is interested in as they update their opportunities. But selecting a product from dozens on the list is quite inconvenient. Instead, you can create a list that progressively changes based on a specific value. In your case, you will first ask the user first to select a category of products and then the product itself. Once the customer chooses Detergents, it becomes much easier to search through a much shorter list of products within this one category.
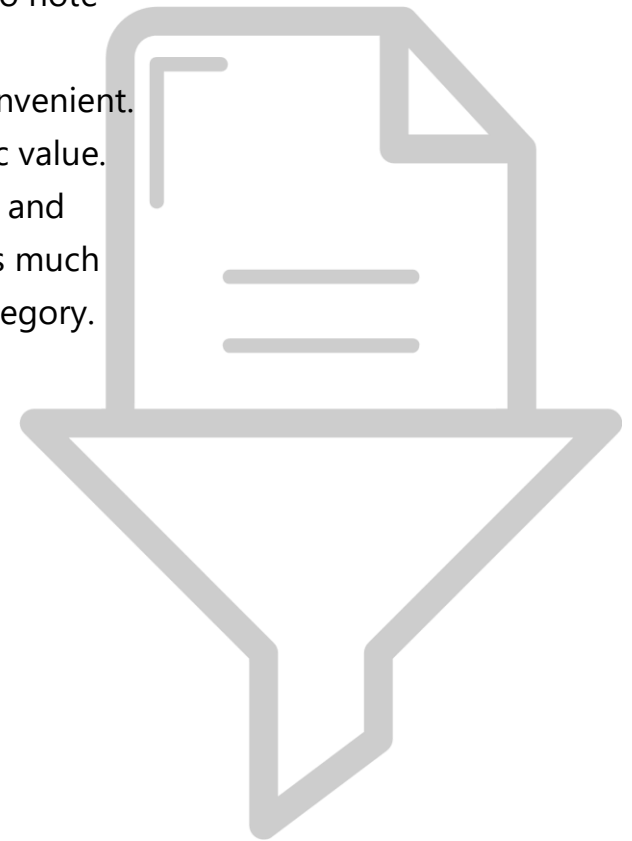
#43

Avoid duplicates

Having a Mobile CRM client does not mean your data will be all over the place, duplicating itself and causing headaches. The purpose of the duplicate detection is to discover duplicate records, such as Accounts using the same name or Contacts using the same e-mail address. The duplicate detection rules are to be set on the CRM server and your Mobile CRM application can make use of the server rules.

Whenever an entity record is saved, this record is compared against existing records to find possible matches. If there are any, MobileCRM application displays a warning and the user is given a chance to edit the data.
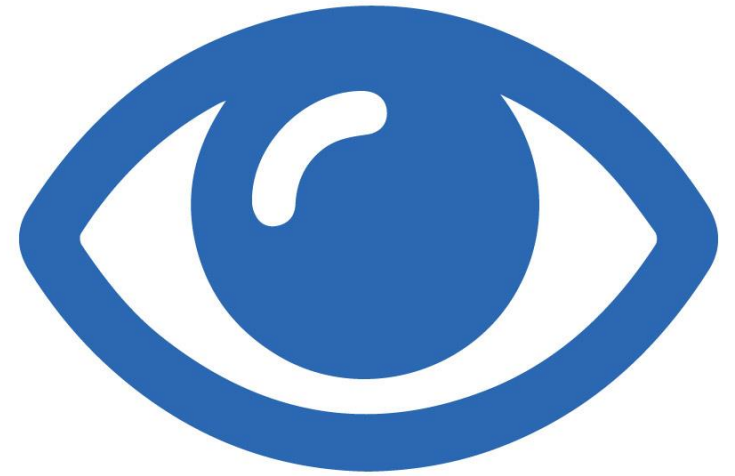
Section 6
Insight

#44

Up-to-date data for management

It's a constant battle: Management wants their sales reps to put in the data into CRM, so they can make assessments and forecasts and sales reps argue they need to focus on selling, instead of data administrations. Who's in the right?

They both are. And Mobile CRM can help both parties achieve what they want: up-to-date data in CRM and time for sales pitches. It does so by seamlessly integrating into the sales reps' process. Sales reps can do the majority, if not all of their work in Mobile CRM. And when changing the status of an opportunity is a matter of two simple taps on the screen, the management will always have the freshest data possible to make well-informed decisions whenever they need. No more "Please fill in your reports by the end of the week".
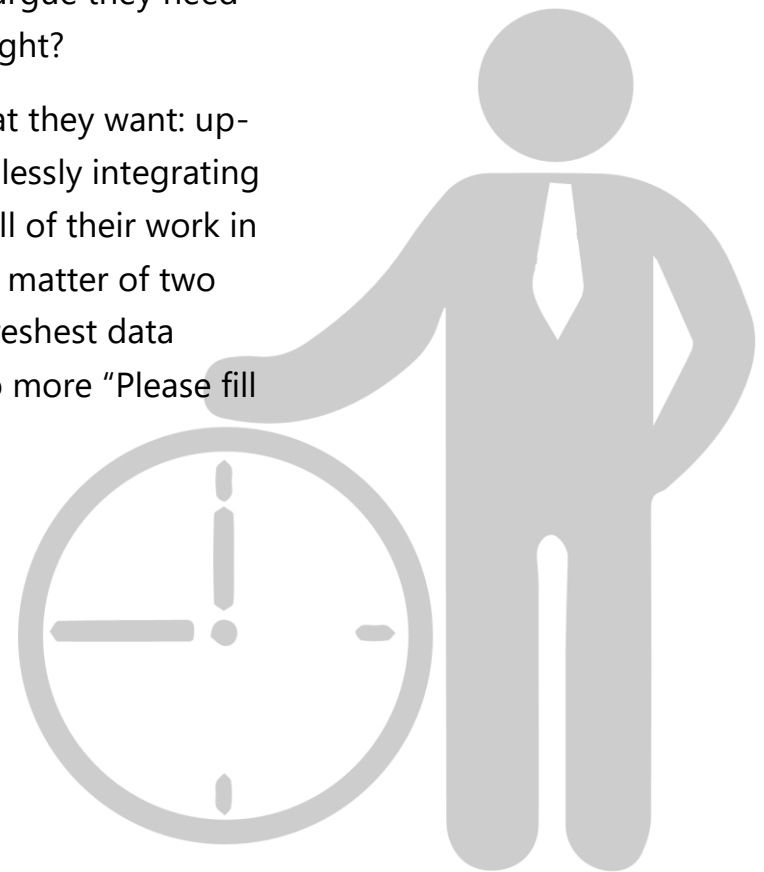
#45

Get a quick overview of crucial data in one place

A mobile dashboard, just like a dashboard in Dynamics CRM, acts as a homepage for your CRM–it's the first thing that pops up when you open the app, and its goal is to show you things that matter to you packed neatly into one place.

By default, a Resco Mobile CRM dashboard shows 3 charts: orders, opportunities, and cases. But that doesn't have to fit everyone. So why not create one that'll work for you? Why not tailor it exactly to your needs? You can do so very easily—just pick the things you want to see first. You can also include a second (or third) dashboard if you want to have multiple aggregate pages. All for the convenience.

#46

Compare & analyze

The multi-series charts display more values at once so you can compare and analyze, for instance, the estimated and actual revenues.

A multi-series chart displays more than two values at once. It's quite useful when you want to compare and analyze data. For example the chart shows won opportunities by account; displaying not only the total revenue but also the estimated one. You can see how much the opportunities really brought in and if your estimates match the results.

#47

Automate your googling

A good sales guy never underestimates the power of research. That's why one of the first things he does is to do a search of any new lead. Whether it's a company or an individual, the Internet is a great asset in finding out more before the first approach.

Why not make this mini-research easier? Your Mobile CRM app can automatically google a company or a person for you, so you can just take a look at the results.

#48

Find out where the drivers are

Mobile CRM can even function as a real-time GPS fleet tracker. Not only for transport companies, but also for all kinds of service providers like plumbing, appliance repairs or security services can find this very useful.

You're able to see the movement of your fleet, so you can have oversight as to where your drivers are at any given moment and can give an accurate estimate of the time of the delivery to the customer. Combine it with the option to navigate to the assigned destination and having information on what to do and what to get approved once on the spot and you've got yourself a winner.

#49

Declutter your app

If you have too many things in one place, it can get cluttered. What you can do in case you can't just toss some of it away? You can separate them to restore the order.

Have too many charts to put on a single dashboard? Create additional dashboards. Are you a manager and want to display your appointments in one calendar and team appointments and tasks in another one? Do it. Would you like to have two maps, one for your accounts and the other for the whole team's accounts? Why not?

Stay organized even if you need more than fits a single dashboard, calendar or a map.

#50

Stay organized with folders

Can't see the forest for the trees? Group numerous individual entities into folders to arrange your mobile CRM solution the way it suits you.

Entities can be grouped into different folders. You can create a folder for records and views you use most often; managers can create separate folders for different types of employees, and so on. It's pretty much the same as having the documents on your PC divided into different folders–it helps you keep order while you work.
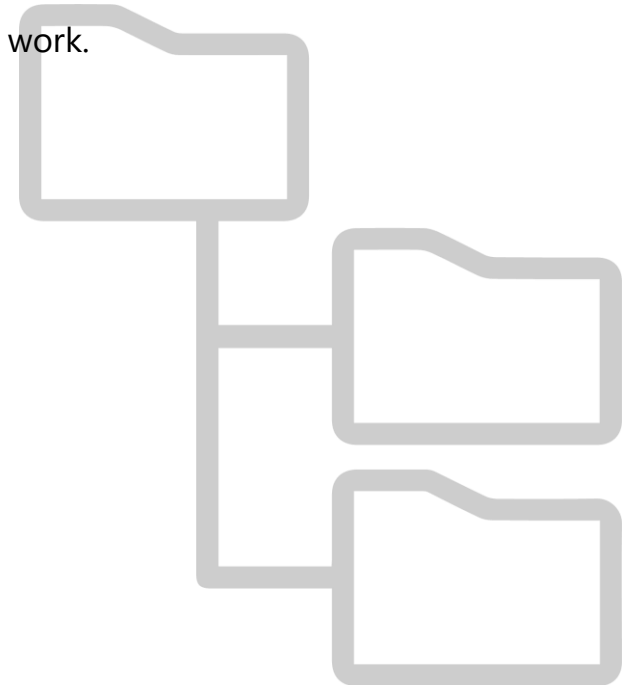
#51

Find the needle in a haystack

Charts and graphs turn data into digestible chunks of information that are understandable at first sight. But what if you need to analyze your charts in detail? You can examine them in depth by diving into your data with chart drill down. Each part of it can be broken into different charts, graphs or diagrams simply by tapping on it and choosing an appropriate criterion.

For example, when you are looking at the orders, go from yearly data to quarterly, from quarterly to monthly, and then inspect the amounts by account to see which customers brought in the most revenue last month. But you can also go back a step and see who of the sales reps produced the most orders and became the company's top seller. Does the biggest order mean the best sales guy? You can find out.
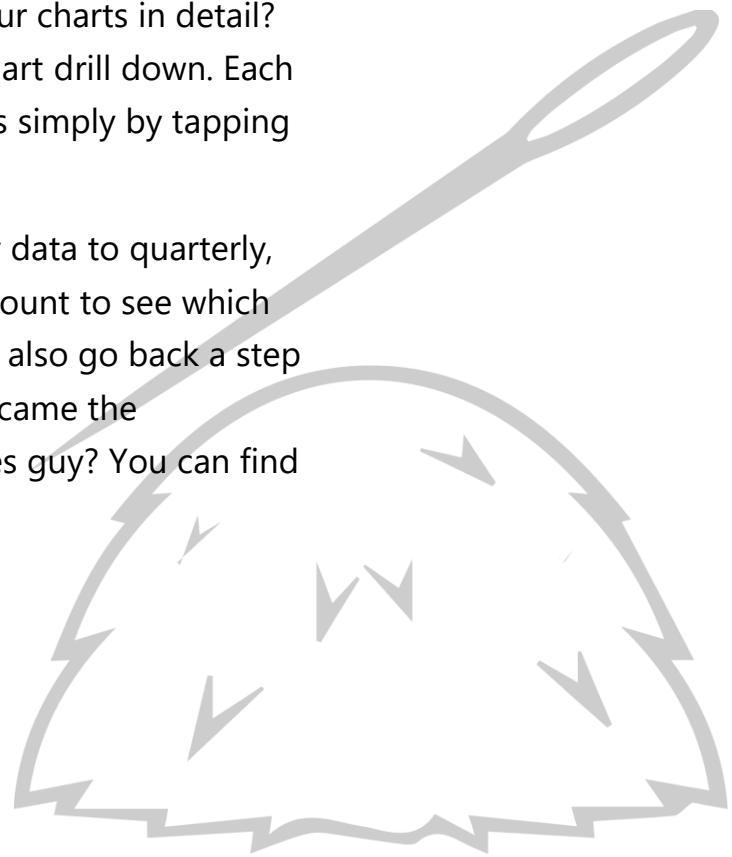
#52

Keep track of email communication with the client

Tracking of emails might be the next best thing since sliced bread–you can see the exchanged email communication with a customer, so you or your colleagues will always have the details of what was said and done.

With Mobile CRM, even those emails sent and received on your phone or tablet will find their way into the database.

#53

Put a face to the name

Add images into your app to see a product's picture or a contact's photo. You can add pictures to a list of products, so you can browse and navigate through it faster. So when you look for a particular product, you don't need to read the names, you can just scan the list to quickly find the one you want.

Or you can add a photo to your contact (put a face to the name) that will trigger your memory. Helpful for the occasion when you are meeting the person face to face.

#54

Find people on LinkedIn, automatically

With over 300 million users, LinkedIn has become an essential media for many professionals. Chances are, you are as well trying to look for people you know or can connect to in order to expand your network, find new opportunities and built relationships.

Instead of painstakingly searching for people you know by typing in their name in the search bar, let your Mobile app find people for you automatically. Based on fields from your CRM, your contacts or leads can be found on LinkedIn, the ever growing network of professionals you're a part of.
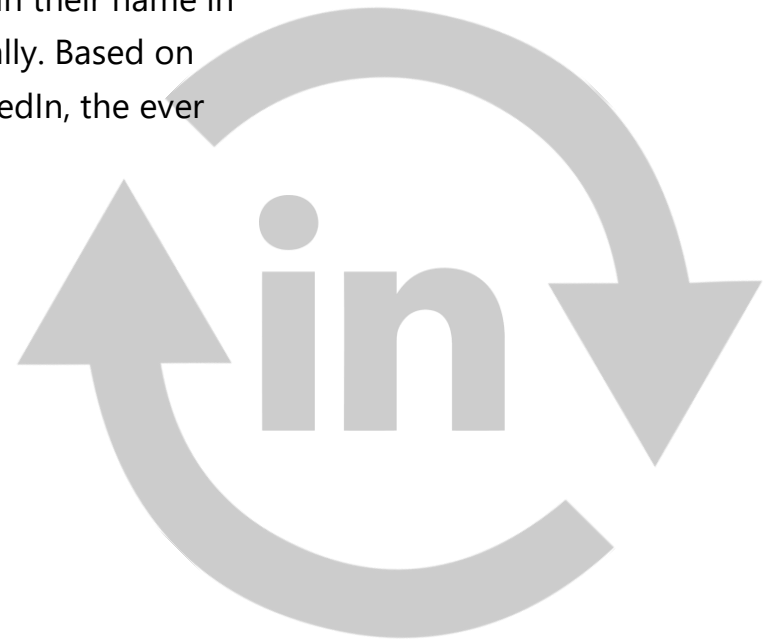
#55

Visual merchandising done easy

The way of how products in stores are displayed and arranged is no accident. Everything is done so that the products attract customers and lure them to purchase.

With a mobile app, merchandisers can easily plan and carry out daily store visits. They can navigate to customer locations in their assigned territory, manage their schedules and routes, and coordinate product merchandising with the customer, sales associates, and back office. In the app, they can take photos of product fixtures and displays, answer checklists, do a quick inventory and report any issues back to the office. If you don't employ any dedicated staff in the field, turn your sales reps into brand ambassadors–they can easily snap photos and instruct the customer based on given guidelines.

The taken photos are then stored in CRM where they are easily accessible by merchandisers who plan and oversee the in-store product placements and visuals.

#56

Get a better overview of your time

Easily create appointments or reschedule the existing ones if the plans change. The neat calendar will help you organize your schedule and stay on course at all times.

What's the difference between using any calendar and one that's in your CRM app?

You don't need to switch between calendar and CRM app to plan your day. Which would be, let's be honest, quite annoying. In a CRM calendar, you can directly go into any activity to see the details about it. You not only see the topic of the appointment, but also the description, location, the people involved and other facts that will help you prepare for the meeting. You can also attach documents–a contract you want to talk about for instance. Or open up the appointment and make a quick call to confirm the meeting. Everything done seamlessly integrated within one application.

#57

Combine your work and personal calendar

Don't schedule a meeting when you're supposed to be at your kid's school play.

You can import events from your private calendar into your CRM calendar. And vice versa–you can display CRM events in your personal calendar. Seeing all your appointments and events in a single calendar ensures your professional and personal life will not collide.

For example, if you see that you are planning to pick your parents up from the airport on Wednesday afternoon, you won't schedule any meetings around this time in case you get stuck in traffic on the way back.

#58

Customize the calendar to fit your needs

Do you work at 4 am? No? Then why even have this time on your calendar? Set up a reasonable timeframe for your workday, such as from 8 a.m. to 6 p.m. You can also get rid of Saturdays and Sundays or turn off monthly view if you don't use it. And while you're at it, allow for seasonal workers to only see the calendar for specified months.

You can also assign different colors to specific activities. If you want, you can display your meetings in green, phone calls in yellow and tasks in blue color. It just makes the whole thing a bit more organized. You'll get the basic information even without reading through you're the endeavors you have planned.

#59

Get a 360° view of a customer on one screen

When designing the form, we kept one goal in mind: To provide a perfect overview of a record on one screen.

How is this accomplished? Once you click on a customer (or any other record), you can see the details as well as associated records immediately, without needing to go anywhere else. You can see if there are any outstanding service cases before you go and propose an additional product or quickly perform common actions–edit data or create a new opportunity or order.

The 360-degree view will not only gather all relevant content into one place, so you don't have to search for each piece of information one-by-one, it will also help you understand customer data when put into context.
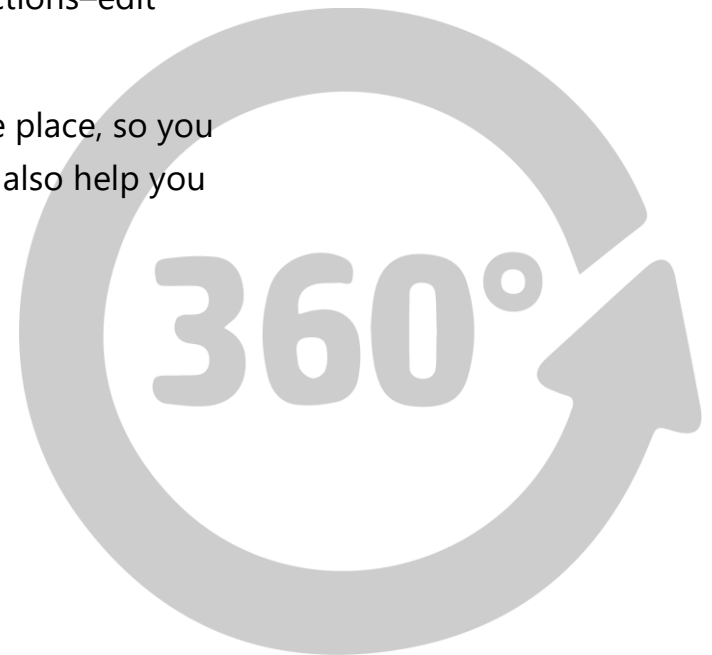
#60

Switch views to maps or charts

Do you prefer your leads, accounts, and contacts displayed on a map instead of a list? Or prefer visualizing your opportunities in charts, so you'll know where your focus needs to be? Whether you're the one or the other, having the option to switch any view to a chart or a map will allow you to see the data exactly the way you want it to see.

#61

Checklists, surveys, questionnaires, polls… to go

A mobile application makes it possible to easily collect information from people. Whether you need to do a market research or a quality check, you can do it in a mobile application. No papers necessary, just quick and easy gathering of data. And because you can do it all offline, there are no delays in the loading of new questions or troubles when you try to save the completed surveys.

A company that builds large cargo ships can equip its engineers with a mobile application. The users go in with a tablet and check every nut and bolt on the ship, and store all their findings by ticking checkboxes.

#62

Avoid confusions by having it all in one place

Want to find out if the person you are talking to works for a company that is already a customer or still a prospect? Or you want to see which city the company is located in as you are looking at your opportunities? You know, to find out if you can pay the prospect a visit while you're in town.

Resco Mobile CRM allows you to pull information from other sources into one form, so you'll get a 360 view of any record. Ultimately, you're going to save yourself clicks and avoid confusions by having it all in one place.
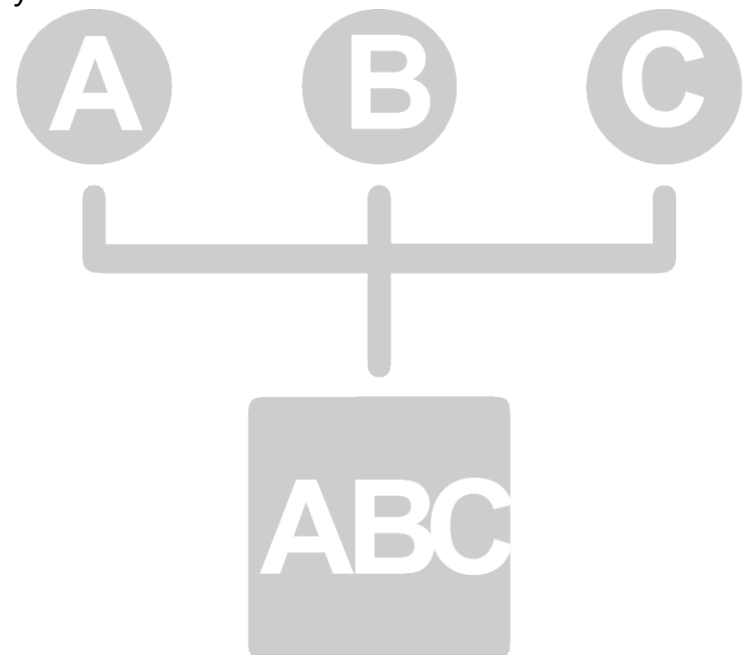
Section 7

Collaboration

#63

Chat with your colleagues

You can discuss opportunities and cases with your colleagues, without repeatedly calling each other or exchanging loads of e-mails. The chat is basically a Facebook for your CRM. But instead of sharing personal news, you're talking business. You can follow and participate in discussions about any type of record you choose. You can also share pictures, documents and links to records in your posts.

This collaboration works remarkably well because of real-time push notifications. Even when you're not working with the app, you still get notified about new comments and questions.
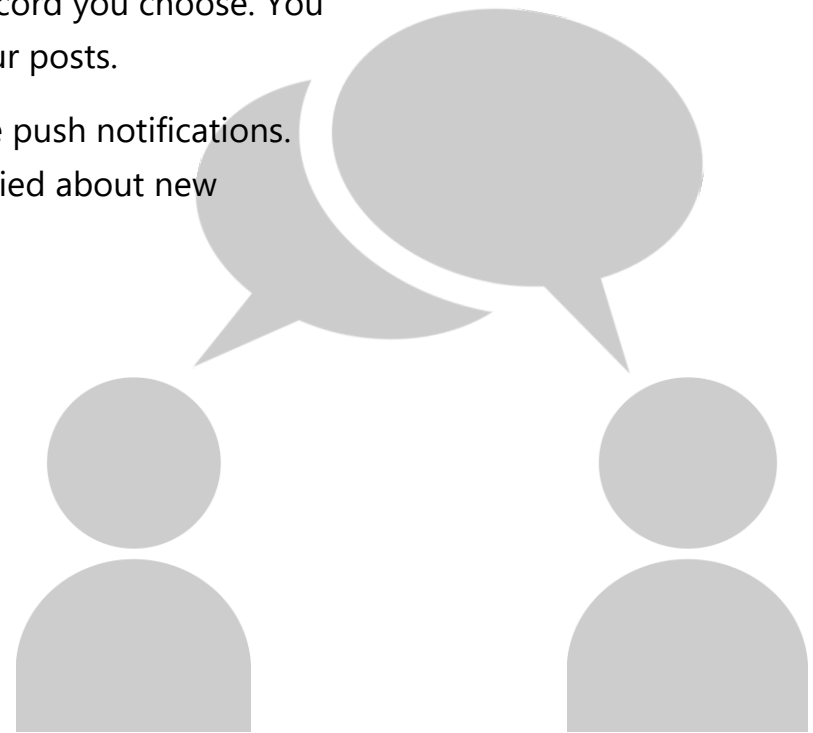
#64

Email link to a record

You can e-mail a link to a CRM record directly from the app if you ever need a second pair of eyes. You can ask your manager for an input or inquire more details from a colleague. Emailing a direct link to the record is a much more elegant solution than to tell someone to look up a record in CRM named so and so.

The 'e-mail a link' button creates two links to a CRM record in a single message. One for a web browser and the other for mobile access. The recipient can now access this record in the office or on the go. Simple as that.
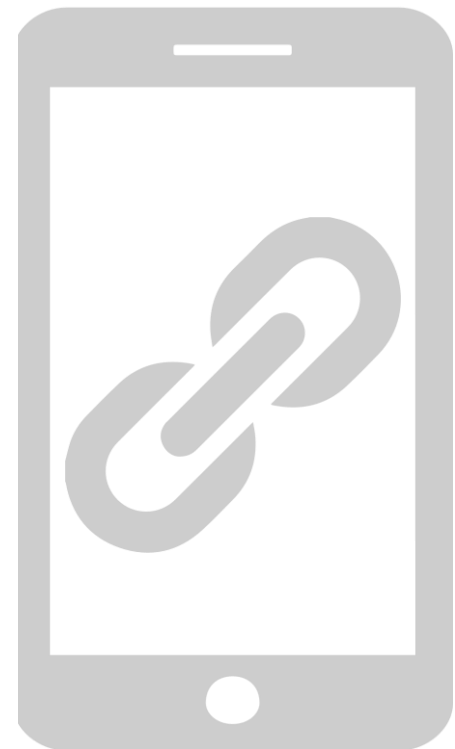
#65

Share access to a record with a colleague

Let's say you plan to go on a 3-week long vacation. You are desperately trying to get done as many things as you possibly can before you leave. The last thing you do is you set up an out of office message, listing your colleague as a reliable contact during your absence. The problem is, if one of your customers gets in touch with your colleague, chances are he won't be able to help them much due to lack of access to your data.

Make sure your colleague has the means to cover for you entirely – share the access to your records with him. This means that during your absence, your colleague will have the permissions to perform actions in CRM system just as you would. And the mobile CRM application will ensure that these shared records are also available to your colleague in the mobile application for the time being.
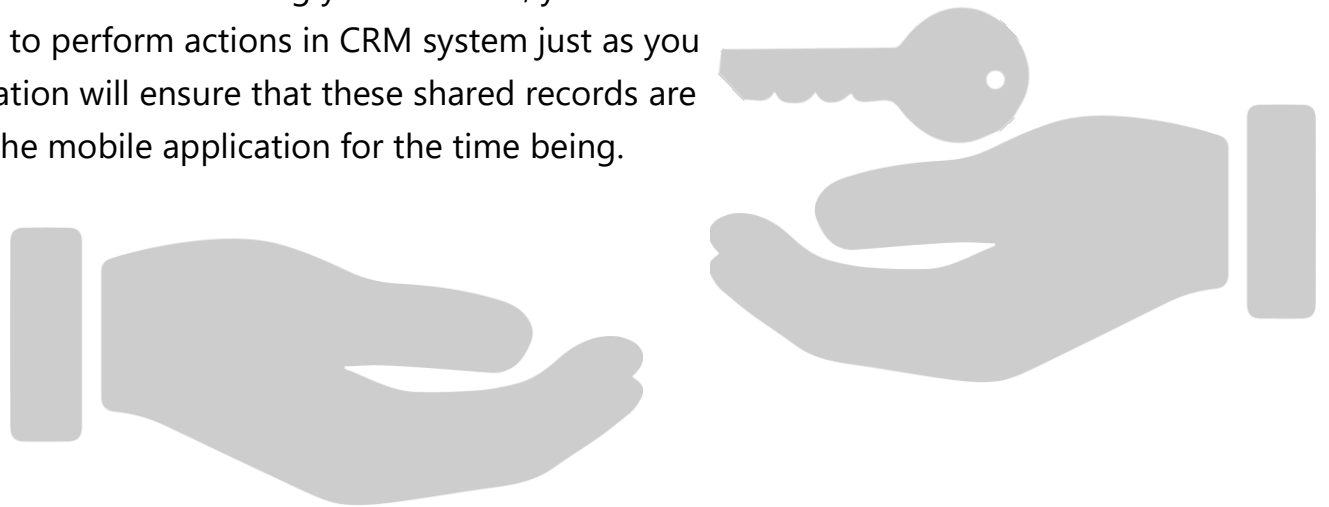
Cost effectiveness

#66

Eliminate the need for a PC altogether

Yes, it is possible to be "just" mobile. When you think of it, some people don't need a PC at all. Like maintenance mechanics or insurance inspectors. The core of their job is to be outside, checking on things and reporting to the back-office. These tasks can be done comfortably on a tablet. If you give them mobile access only, you'll eliminate the costs associated with a PC. And, let's be honest, once they have the tablet in their hands, they'll soon realize that a computer is completely unnecessary and redundant.

#67

Support BYOD

BYOD is huge these days. Employees call for it to catch on everywhere since they prefer using their own devices. But IT departments often fear the business data might get compromised. The middle ground? Smart support of BYOD–a mobile CRM application that allows you to give CRM access to employees even from a personal phone or tablet. But you can keep the privilege to approve them first. If anything unexpected should happen, you also have the option to lock remotely the application and wipe out all data from it. And if the employee leaves the company, you've got a way to remove the data, so nothing confidential leaks out.
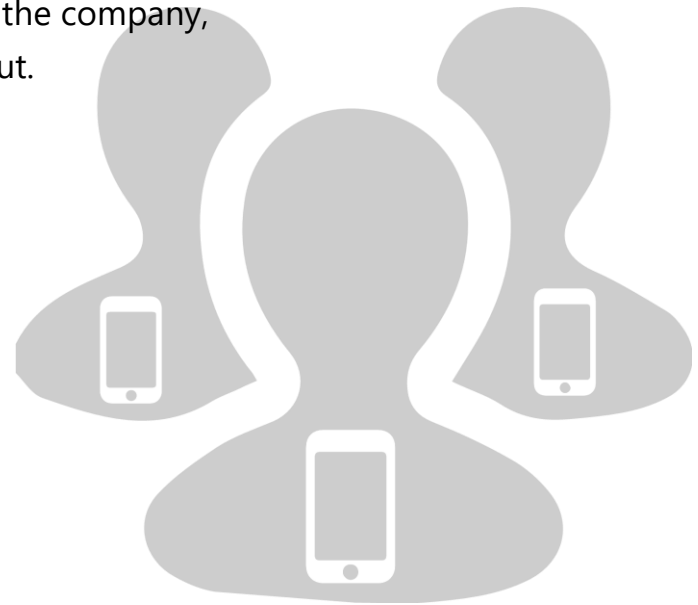
#68

Involve people in the process

Picking a device is already a common practice in most businesses when it comes to phones–employees usually get to choose which one they want with the given monthly plan. You can do the same for your Mobile CRM users.

Make a selection of devices that are apt for your business and give the final word to each person. This approach might just make them lose their initial resentment towards something new. By picking a mobile device, they will feel like a part of the decision and, hence, be positive towards adopting mobile CRM as a whole.

No extra effort on your side. Everyone is happy.
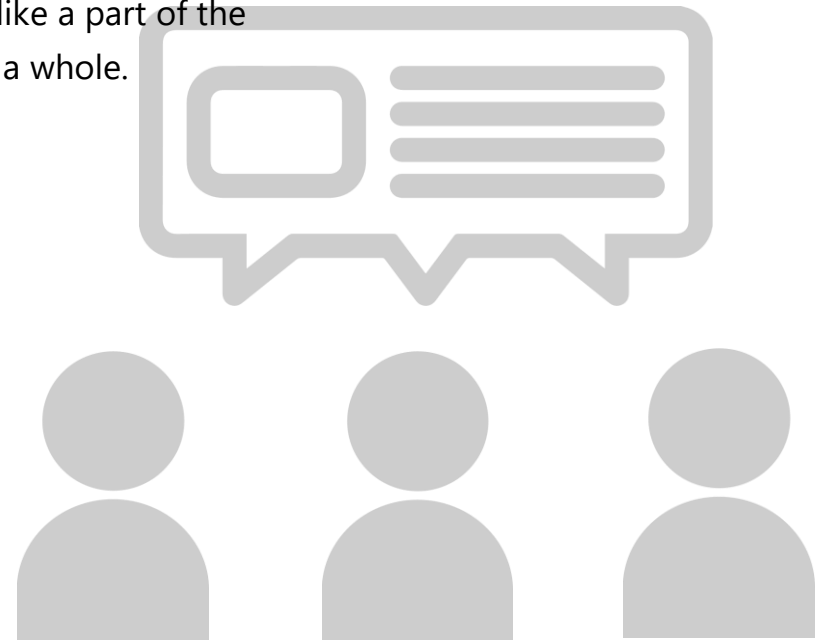
#69

Analyze the app usage to evaluate your investment

Want to see if the investment into Mobile CRM for your employees paid off? If you want to, you can analyze how (and if) they use the app.

You can capture the time and GPS location whenever a mobile user synchronizes the application, creates, updates, deletes, or works with any record. You can also track the application's state events: that is whether the application is running, paused (put to background), resumed (put back to foreground) or terminated.

All of this will help you understand how field workers use the mobile CRM app and decide whether it's worth investing in the application.

#70

Customize the app only once

Having a mix of different mobile devices in your company? No worries. You can customize the app just once, and all changes will be reflected instantly on all types of mobile devices. This multiplatform approach allows you to cut down on the development time & cost while having the freedom to choose multiple types of mobile devices at once.
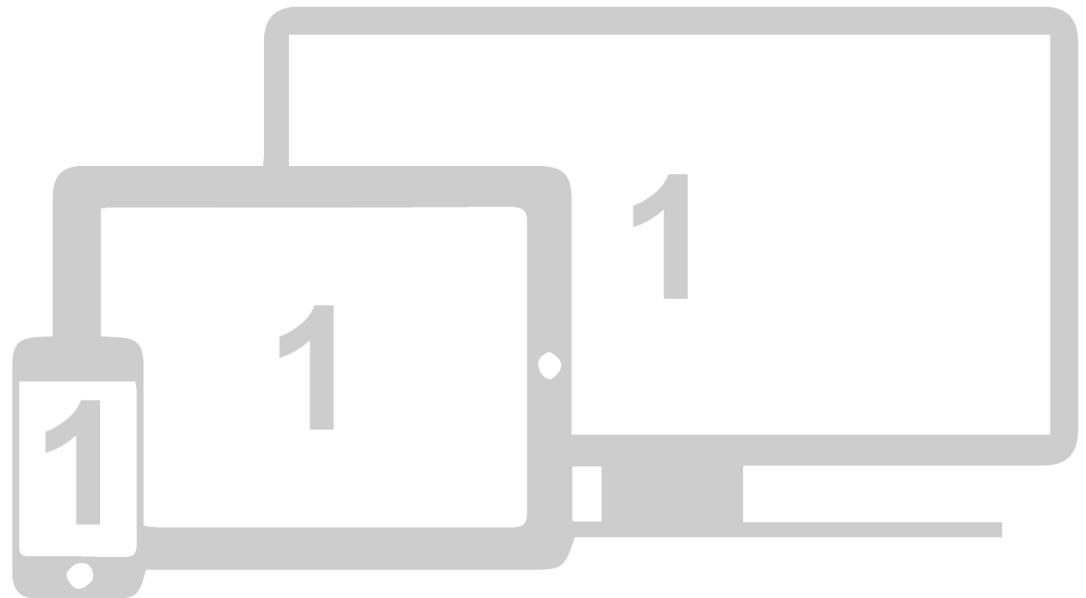
#71

Create your app without any code

Need to customize the mobile CRM application to make it work for you? With the just-clicks-no-code approach, the app can be modified in a few moments without ever needing to touch a piece of code.

Add custom entities and fields, design views and forms, configure the dashboard, create alternate versions for different users and much more with just a few drags & drops. Even a lot of the business logic can be recreated just by using a set of rules instead of custom scripts.

The tools and designers allow for a tailor-made mobile experience without relying on programming to do the heavy lifting.

#72

Make changes to the system as you go

Our developers had this ingenious idea–to create a tool that lets you do changes to the setup of the application without needing to complete a new code and deploy the app to the stores. And so, Woodford was created. When using this free customizing tool, every change of the application can be done and seen in real-time. So smaller or larger alternations of the app are just a matter of you making the change and hitting the publish button. All your work is immediately reflected in the application. The wait is over!
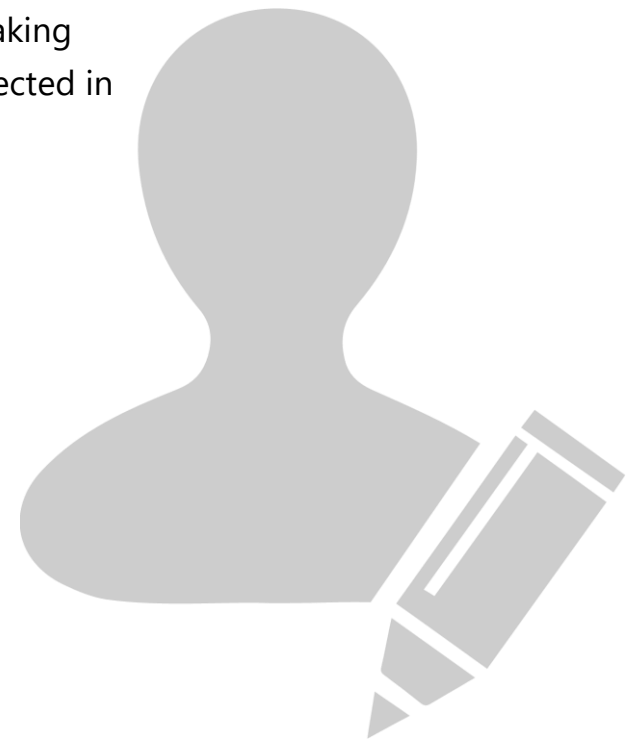
#73

Spare yourself the hustles of custom development

When it comes to the decision of an in-house development versus buying a ready-to-use product, it's easy to fall into the trap of "We can do it on our own just fine".

In-house development can be, however, an unfortunate decision, especially when it comes to time—we all know deadlines will be missed. Then there's also the question of picking the platform and keeping up with its updates, seamless synchronization with the CRM server and adding functionality as you go. Developing your own app is no walk in a park. You'll face many challenges. And wouldn't it be better to focus on the business instead of struggling with different platforms, technical details, tricky deployment, and time?

With a ready-to-use solution, you can go mobile in a relatively short time-frame. If you put your mind to it, it can be a matter of weeks to have an app on your desk.
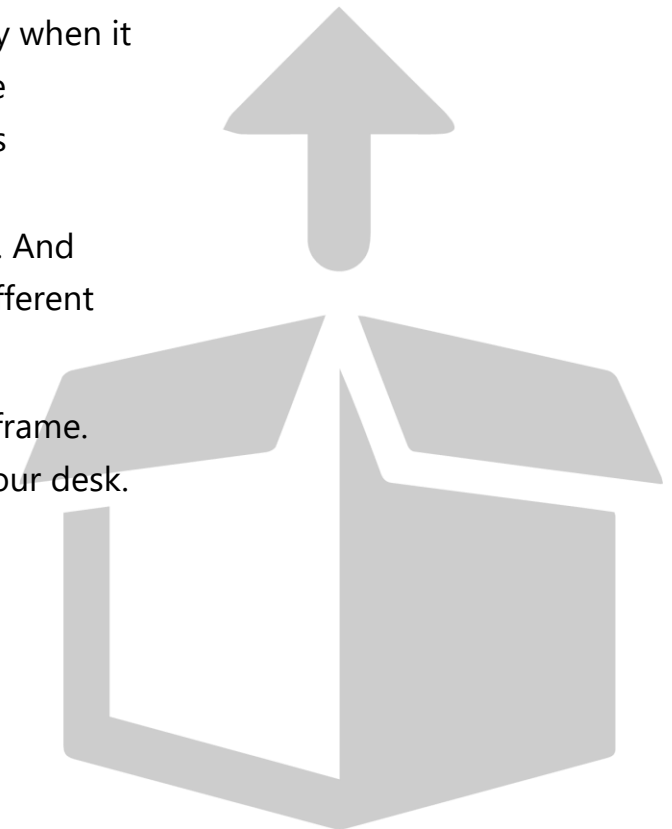
#74

Utilize flexible license assignment

People come and go. They change job roles or leave for maternity leave. Things are never steady in a corporate world. That's why you need to stay agile also when it comes to your Mobile CRM application. You need to have the option to assign and re-assign user licenses as you please. With Resco's Mobile CRM, this option is always at your disposal. You don't need to contact any support team to re-assign a license or painstakingly un-install software from one device in order to use the license on another. Just a few clicks in the administration console on your PC will do. Your users are ready to go in a matter of few seconds.

#75

Free up unused licenses

We know it's not easy to keep track of all employees leaving the organization or changing their job role. Especially when you are responsible for a large group of people—hundreds or thousands of CRM users. Some might just happen to fall through the cracks.

Luckily, the Resco Mobile CRM client will automatically free up licenses that have not been used for 90 days in a row. This will guarantee that no inactive user has a Mobile CRM license you paid for.
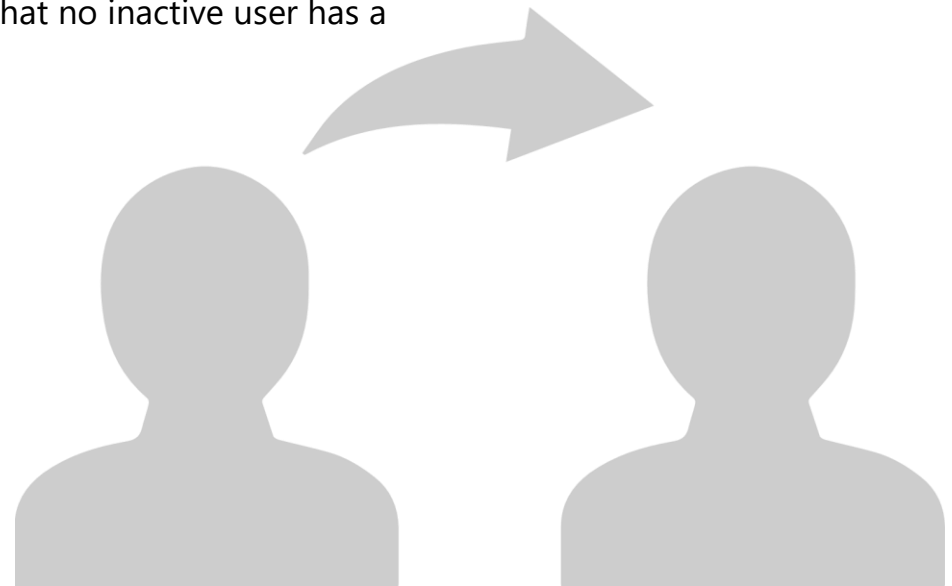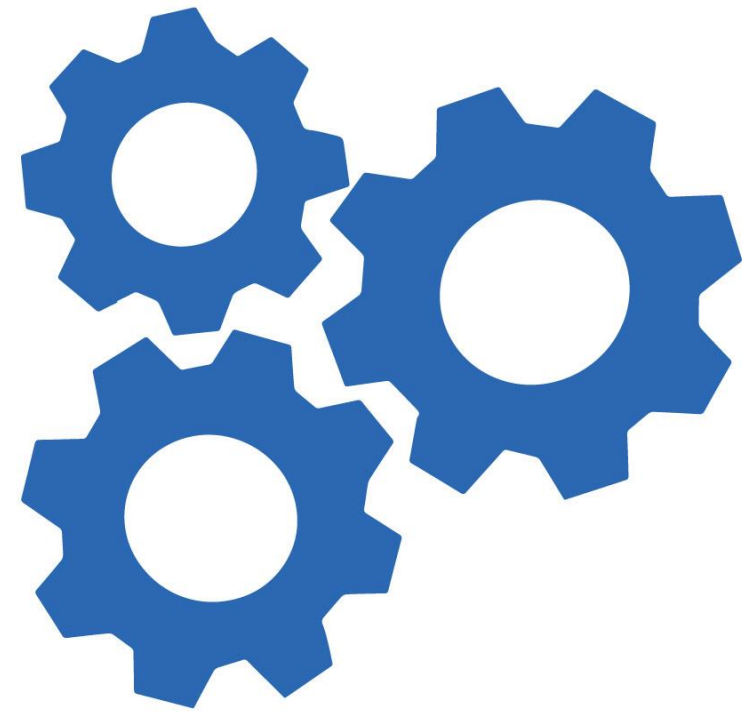
Section 9
Efficiency

#76

Place & log in your phone calls

Call a contact right then & there from the app (provided you have the phone number). Save it afterward as a CRM activity and you won't lose track. You can also use Skype or Facetime to make calls.

Once you finish the call, you'll see a new activity in your CRM app. It has already mapped the call to the person you were talking to—all you need to do is type in a short note (if you want to) and hit save. The call will be automatically tracked, so you can come back to it whenever needed.

Phones running on Android also offer the option to track incoming calls—these will appear as a list of calls in the application, so you can pick and choose which is business-related and shall be stored in the CRM system as a phone call activity.
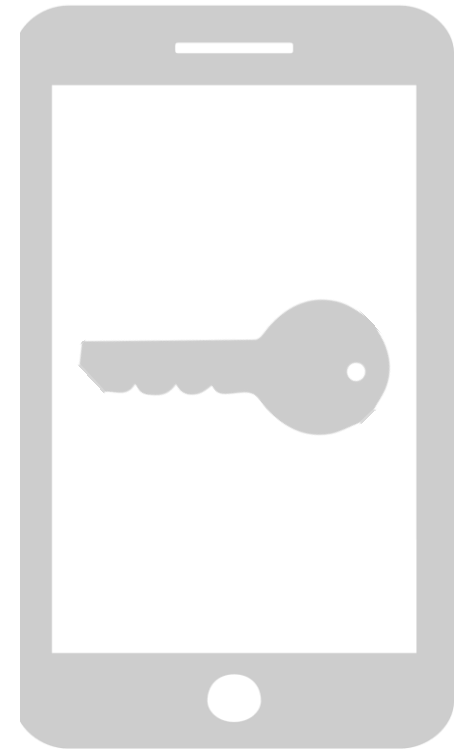
#77

Interactive map at your command

Online maps have already become a common part of our lives. When we look for an address, restaurant, hotel or another point of interest, we use Google or Bing maps to find that place and a way how to get there. But how about using this functionality in a CRM mobile client?

Resco Mobile CRM provides an interactive map as an alternative view of accounts, contacts, leads or any other records. You can zoom in, zoom out, filter and search within the map. Each record is represented by a pin. These little pins are interactive, which basically means you can tap on each one to get to the information about the record, such as the contact details, notes, planned activities and more.

And if you find that the record is not where it should be, tap the "update GPS" or "update address" button once you are at the venue and it will store the correct location for future use.
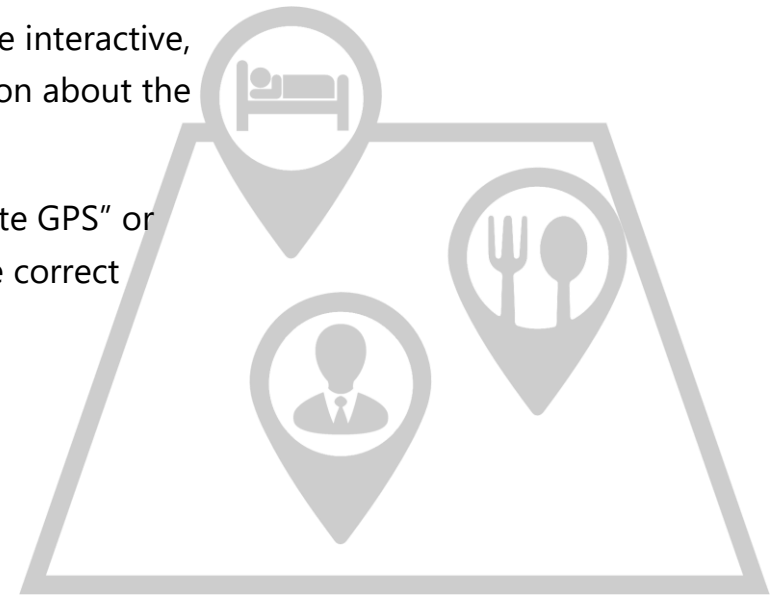
#78

Display activities on a map

It's the classic story: A map meets an entity, the entity has the GPS coordinates, so the map displays its records. But what happens, when the entity does not have the GPS coordinates? For example appointments. No happy end? Not necessarily.

In Resco Mobile CRM app, you can display records on a map based on the position of their parent records. So it's sufficient you know where the customer is located, instead of having to put in the location coordinates when the meeting takes place at their office.
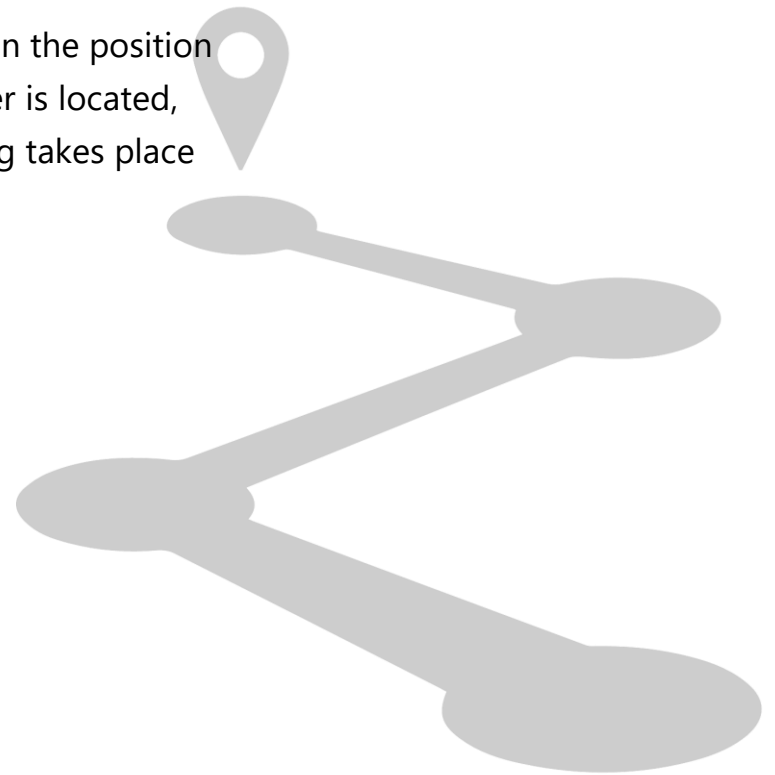
#79

Plan your activities for the day on a map

Whenever planning for a day full of customer visits, it's easier to do the planning with the use of the map. The map can display not only records that have an address, but also those that don't have one per se. The only thing you need to have is a parent record that does have a location—meaning that activities, such as customer visits or service cases can nicely pop up on a map as a route planned to make efficient use to your time, but also gas. Good for the environment too.

#80

Get 1-click access to your activities

The calendar and a map give you 1-click access to the details about each activity. You don't need to switch between multiple tools to find out when & where your next meeting takes place and what are you going to discuss. It's right there! All you need to know in a single place at your fingertips.

#81

Schedule your days and weeks

Scheduling and managing a workday or a workweek is one of the primary roles of a mobile business tool. Mobile CRM application will encompass all of your appointments, tasks, and other activities, so you'll be able to organize your schedule to get the most out of your working hours every day.

If anything changes, you can just drag and drop an appointment to re-schedule it. You can also use multiple calendars: Why just have one if you can have two or more? It's great if you want to separate your own appointments from, let's say, your team's appointments.

To gain even more clarity, you can get rid of certain days and hours. For instance, Saturdays and Sundays can be off duty on your calendar, so will the hours before 8 a.m. And if your business has trainees or other temporary workers, you can give them access to only those days/weeks/months that apply to the time of their assignment with the company.

#82

Make those records stand out

Remember when you were in school, and you used a fluorescent yellow highlighter to pinpoint the things you wanted to remember for the test? When you went through your notes later on, you just skimmed the text and focused only on brightly colored chunks. It was easier to do it this way.

You can apply the same principle to your mobile CRM. Make it easy for users to see what needs their attention. Highlight important records in your Mobile CRM to make them stand out. Just like conditional formatting known mostly from MS Excel, you can set up a set of rules that will define how records on a list are formatted. So highlight those overdue invoices, best opportunities and cases with high priority.

"The lists of records in CRM go on and on. Sure, you can search through them, filter them, sort them, but nothing gets quite the attention as if you highlighted them with colors."
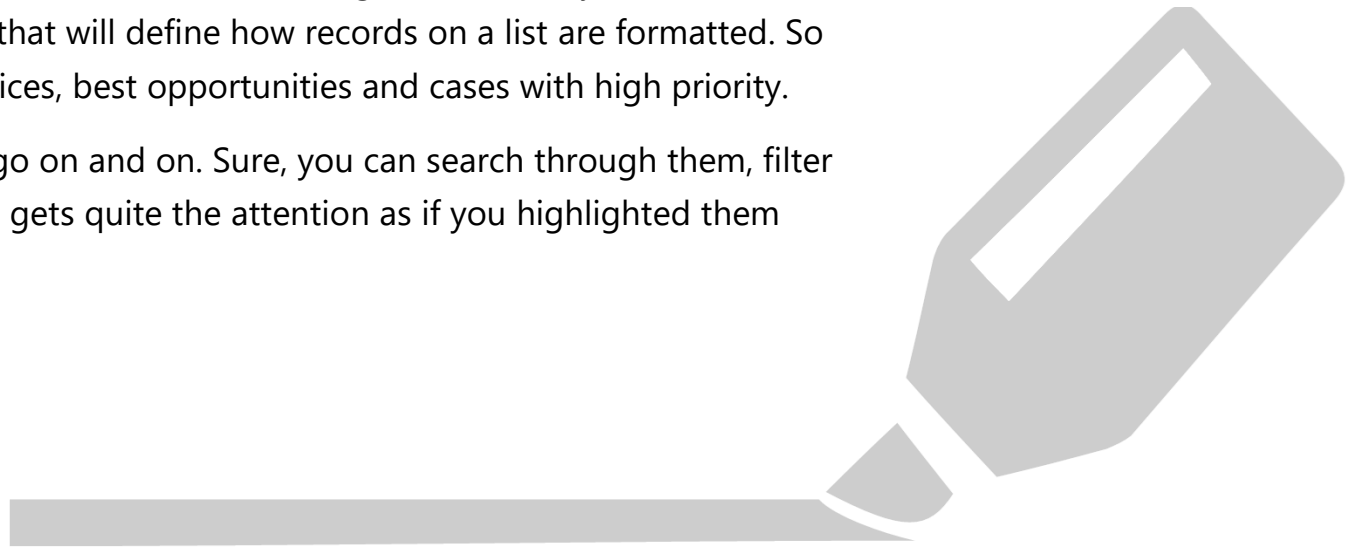
#83

Shorten your product delivery cycle

A typical order process usually looks something like this: A sales rep closes a sale with the customer. Soon (or later) after, the sales rep sends the order to the customer to get it signed. The customer sends the order back. The order is signed or send back for some alternations. The sales rep then puts the order into CRM. This could take anywhere from a few hours to a few days (if the sales rep waits for the end of the week to complete his administrative tasks). The order appears in CRM and is ready to be processed. Company ships the order or places it with a vendor and the product finds its way to the customer.

This can be made so much easier.

With an instant gathering of orders from field workers, you can shorten the life cycles of orders and get the product to the customer faster than ever. And that's not all. Creating orders via a Mobile CRM application also contributes to better accuracy (by eliminating manual data input into CRM, you are also eliminating human mistakes) and improved cash flow (a product that arrives sooner at the customer's site can also be billed and paid for sooner).
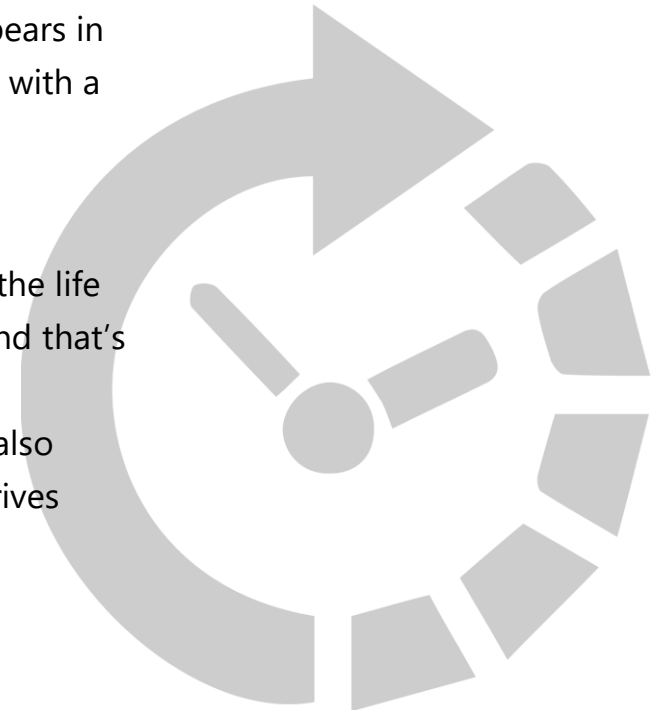
#84

Save contacts without copying them

It seems to happen way too often—you want to call or email someone, but you can't seem to find this person anywhere in the CRM database. Then it hits you. Their contact details never made it from your personal address book into CRM. Luckily, with Mobile CRM, you can import and match the contacts from the address book on your phone with those on your Dynamics CRM server with a single tap.

Forget the tedious manual typing of contact information from your phone's address book to the CRM. Instead import them via the app. And, if the number or the e-mail address of a phone contact and an existing CRM contact match, you can merge the two, so there won't be any duplicates.

After all, who has time for the administration when you've got bigger fish to fry?

#85

Fuse emails and CRM

An email is one of the most popular ways of business communication—it allows you to attach a picture, video, quote, invoice, call/meeting invitations, etc. Compared to other forms of communication, it also stores the information for future use. So if there is ever a need, you can use it as a proof, reference or reminder.

A good Mobile CRM app must also be a perfect email client. Otherwise, salesmen and other professionals would need to switch constantly between Outlook (or another email client) and CRM app. Our goal is to allow you to work easily with text or HTML emails within the app. To do everything you would normally do: read, create a new one, reply, forward, work with attachments...all without leaving the Mobile CRM app.

You can synchronize your Exchange contacts and selected folders (if you don't need your entire inbox) with the app. Are you using multiple clients? Not a problem–you can pick whether you will be using Exchange, Gmail or Dynamics CRM router when sending e-mails from the app.
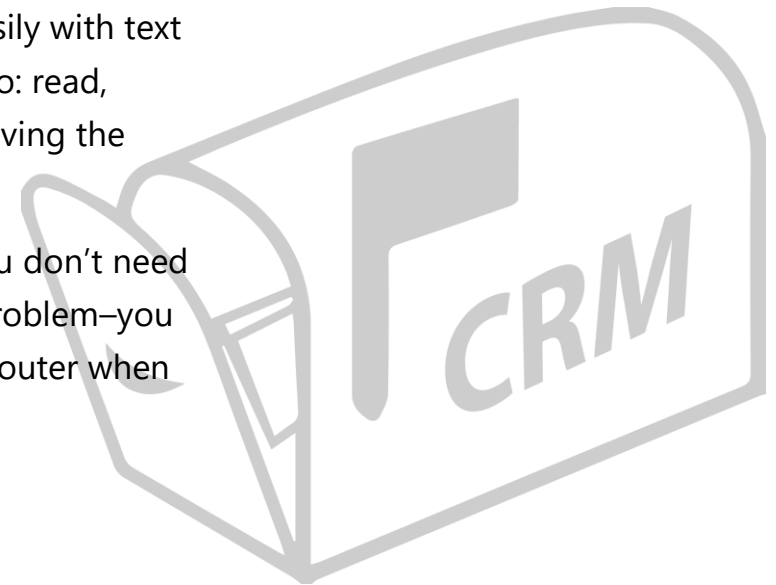
#86

Let us remind you...

Your app will notify you of your upcoming meetings, tasks, and other activities. You can select which events or records should trigger alerts at a certain time. So your chances of forgetting vanish. Or drastically decrease at least.

#87

Store only what you need

The offline capability of the application keeps the data stored in the local database of your phone and tablet. Hence, the data loading is fast and presents no problem in case the Internet connection is lost. The capacity of the storage on a phone or tablet cannot be compared to that of the CRM server. Therefore, for an offline scenario, you need to get smart. Or your Mobile CRM needs to.

Synchronization filters are usually the tools of choice to limit a number of records downloaded to a mobile device. By setting up these filters, you define which data to keep. For example, you might need only opportunities that were created within the last 120 days or leads that are yours or unassigned. So set up filters that will dictate what data makes it into the limited storage space of your device.
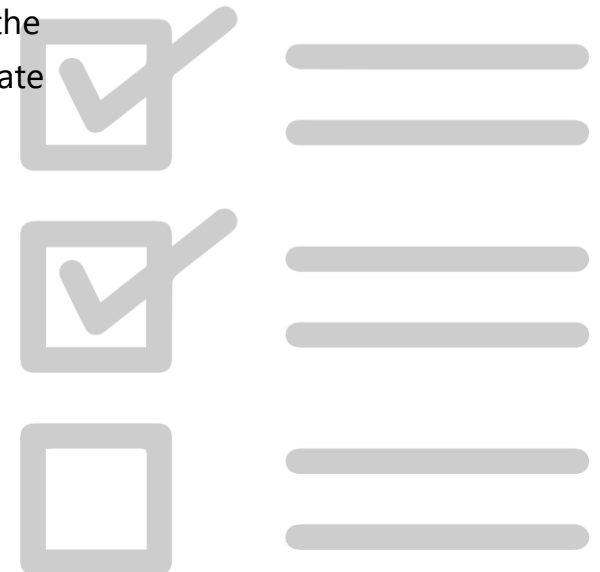
#88

Import your custom icons for faster navigation

Replace the icons in the app with those your users are already used to seeing. You'll make it easier for them to navigate–visually. Plus, you have the opportunity to make the app look more like it was built just for you.

Are you in the dark on how to do it? Don't worry; it's so easy, you'll be done by the time your coffee cools down to a drinking temperature.
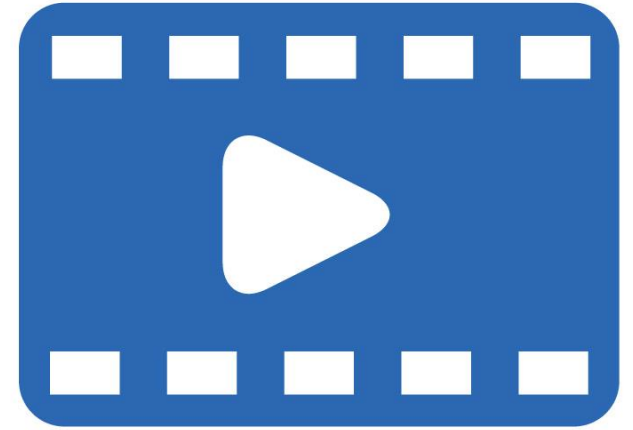
Multimedia

#89

View, add, edit & email attachments

Have product sheets, contracts or other documentation with you at all times. You can add PDFs, MS Office files, pictures, videos and HTML attachments to your records. You can also insert attachments from one note to another or even attach files from an external application, such as your email client. And, you can also email an attachment to a client.

#90

Integrate Gmail & Exchange

Resco Mobile CRM also lets you handle and track your e-mail communication when using Gmail. There's no need to leave the app to see what was already said and done or when you need to respond to that client's inquiry fast.

The same goes for Microsoft Exchange. Access your Exchange inbox within the mobile CRM client. Not only you can receive, view and send messages, but all of them can be tracked automatically in your CRM.

#91

Searching made easy

You can search for records within the application by using the search bar at the top of each view. The app lets you optimize the search to your preference as you can choose to use any fields to find what you're looking for. Whether you want to search by contact name, company address or record owner.

And if a record doesn't directly start with the letters you type, but only contains them, use a percentage sign (%) at the beginning.

What's more, users can search for records not only via text fields (e.g. contact name or email), but also by using a status field or a pick list (e.g. filter out hot opportunities when typing in "hot" or accounts that are identified to be manufacturers in the industry type).

#92

Customize the app with JavaScript and HTML

The JavaScript Bridge allows you to create an HTML page that interacts with the Mobile CRM application. That means you can create/modify/delete records, access the data layer, configuration, metadata, GPS position, etc.

For instance, a custom calculator accesses the price of a house (which is stored in CRM) and calculates the mortgage payment for the chosen property. All done within your CRM.
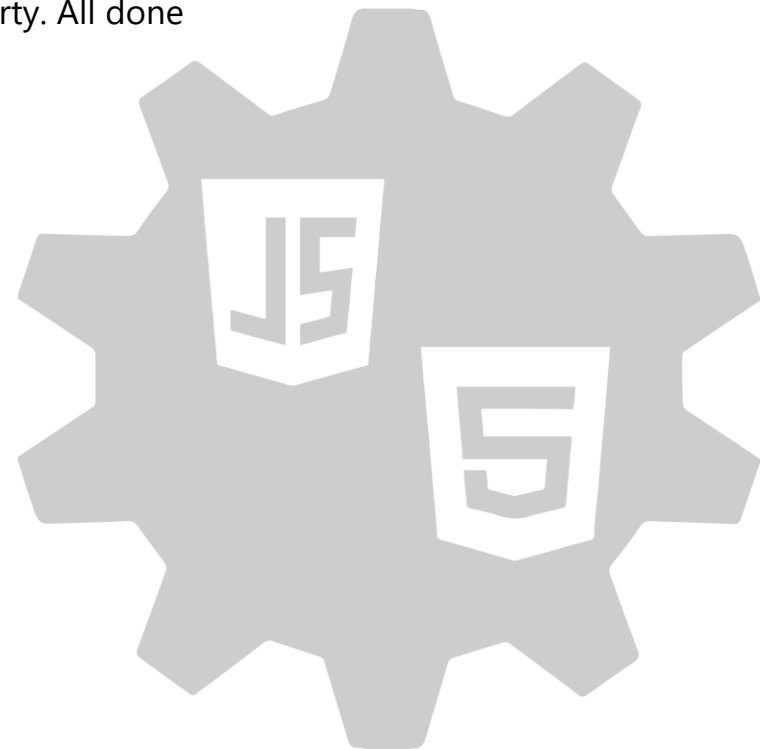
#93

Access your Dropbox files

If you're using Dropbox file hosting service for storing docs, photos, videos and other files, you can associate them with your CRM records and access them offline directly in the Resco Mobile CRM app. It's an easy way to move multiple data files between Dropbox and Dynamics CRM, allowing you to share them instantly with your team and other CRM users in your company.

CRM users can access the Dropbox files anytime in their mobile devices, keep them organized, update them by synchronizing the latest content & collaborate with other team members to work more effectively.
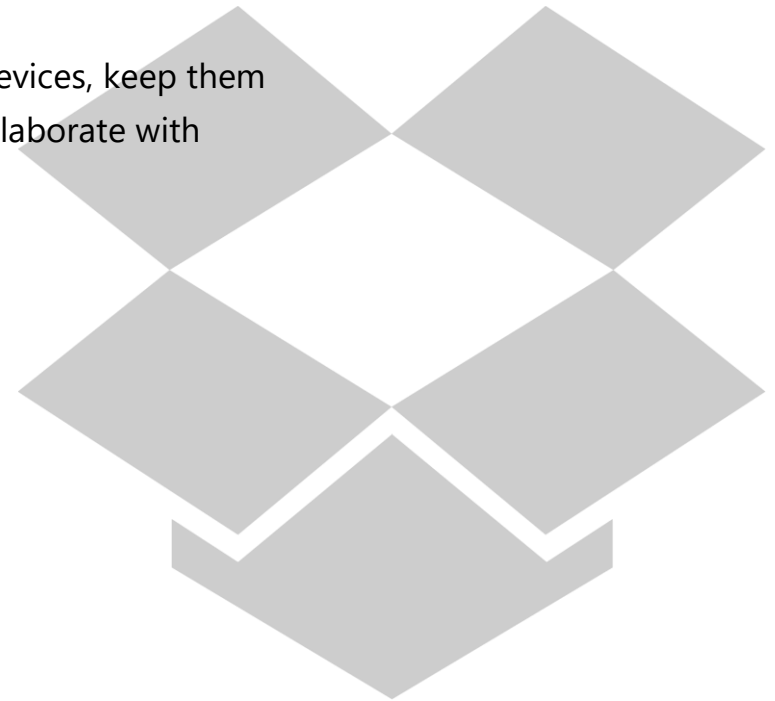
#94

Make use of SharePoint

All SharePoint enthusiasts, brace yourself. Documents stored on your SharePoint can be accessed through the mobile app in an offline mode. You can modify them as well as upload new ones.

Since the storage capacity of phones and tablets is limited, you can set up filters to define which documents will be stored offline (for example only those from last month) or become downloadable on demand.
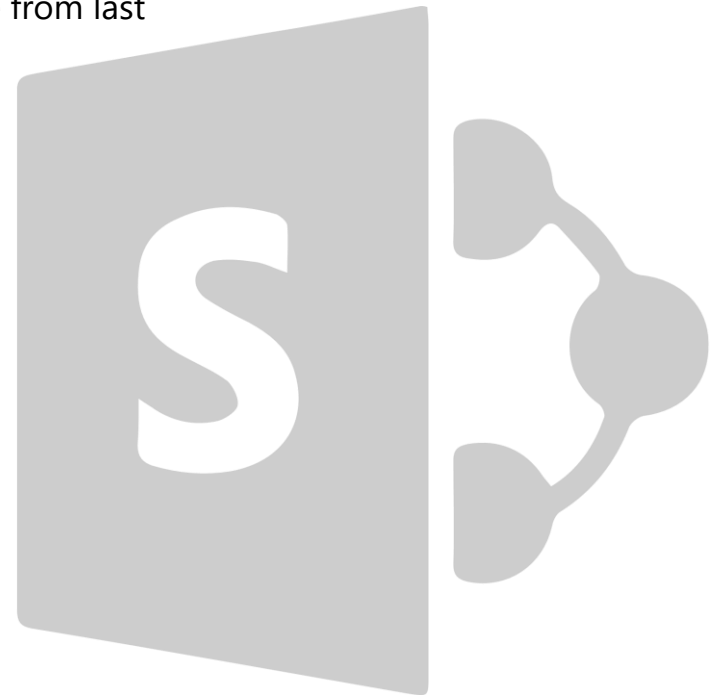
#95

Connect to Google Drive

Working with documents is an integral part of the CRM workflow. Whether it is to show product presentations to customers, or utilizing service manuals and knowledge base, having access to documents is crucial. That's why Resco Mobile CRM also supports Google Drive, an online locker for files and folders with generous storage allowance, compatibility with Google Docs and the ability to open files from 30 software types.

Mobile CRM allows you to play and record multimedia, work with PDF and Office documents and store them in Google Drive.
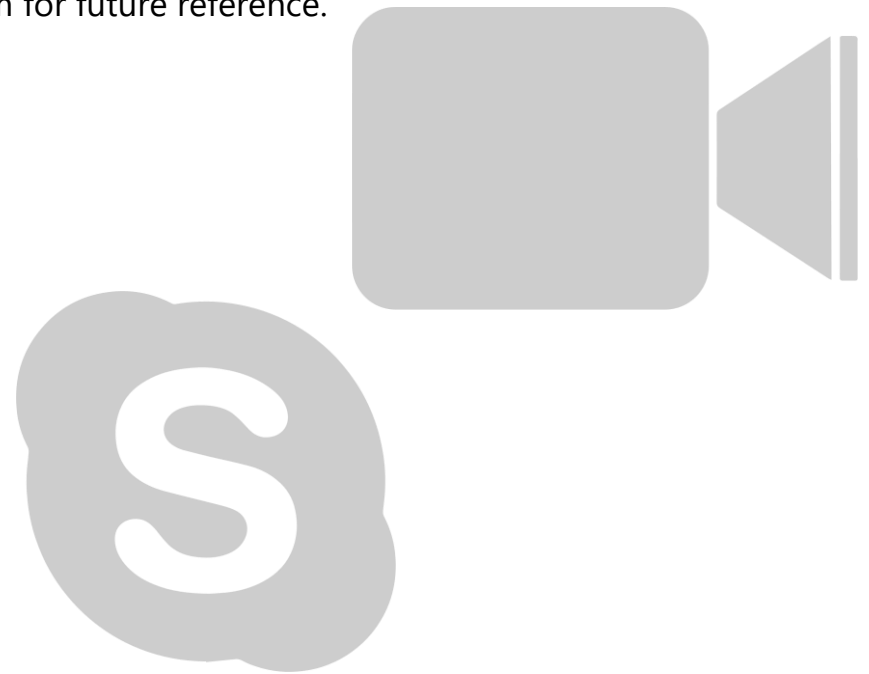
#96

Use Skype to talk face-to-face with clients

Sometimes nothing's better than a good old-fashioned face-to-face conversation. With integrated Skype and FaceTime calls, you can sit down for a chat with prospects, customers or partners instantly. Even if you're a thousand miles apart.

The best part? Every call can be logged into your CRM system for future reference.

#97

Snap a picture

Got a built-in camera? Put it to good use. Take pictures of your product displays, or of that diagram your prospect has drawn during the last meeting. After all, why should you carry loads of papers with you?

Imagine a media agency that takes photos of their outdoor advertisement such as billboards, light boxes or bus ads and sends them to a client as a part of their report. They can also keep the files for internal usage for future reference. All easy to find within one database.

#98

Resize pictures to save space

Change the size of your images, so they don't take up too much space. Image resizing will allow you to downscale your image, which effectively lowers the size of the image. This simple functionality can save you storage space and a lot of Internet traffic.

#99

Capture audio

Don't you sometimes wish you had an audio recording from a meeting to get back to what exactly has been said? With a mobile CRM app, you can record audio with your phone and tablet and save it as an attachment to a record. Instead of writing notes during a meeting, you can focus on the conversation completely. You'll be able to press play and listen to it all over again.

#100

Record videos

A picture is worth a thousand words. Then what about a video? Enrich your CRM records attaching video recordings that you store on the server, in SharePoint, Dropbox or Google Drive. Shot and recorded with your device, directly accessible within the mobile CRM client.
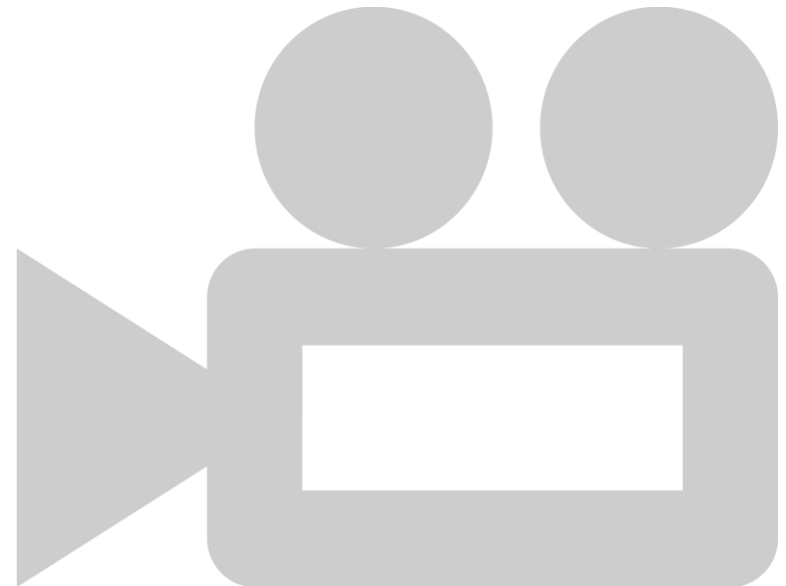
#101

Register event attendees with a QR code

If you want to register people for your event quickly, there's nothing quite as fast and simple as a QR code. During the event, you can simply scan their tickets with a Mobile CRM app to check people into the event or scan their badges to note down who attended which session.

#102

Scan business cards to create new contacts

Don't just save the environment with electronic business cards. Save your time as well. Turn any vCard and meCard into a CRM lead, account or contact instantly. Copy them from your e-mail or scan their QR code, eliminating tedious manual transcription.

You can also use CamCard to capture standard business cards that contain only text—the app will "read" the information on the card and transcript it onto CRM.
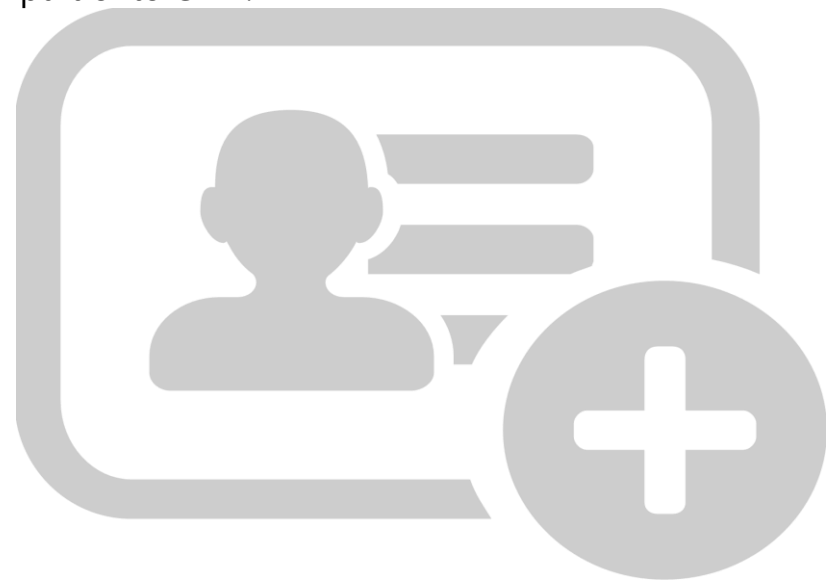
#103

Use Iframes as you please

A full-fledged HTML website directly in your mobile CRM client? Why not? Use Iframes to access customers' websites, your intranet, or get the scoop on your prospects by quickly looking at their online presence. An Iframe can do a lot, with minimal demands on your development resources.
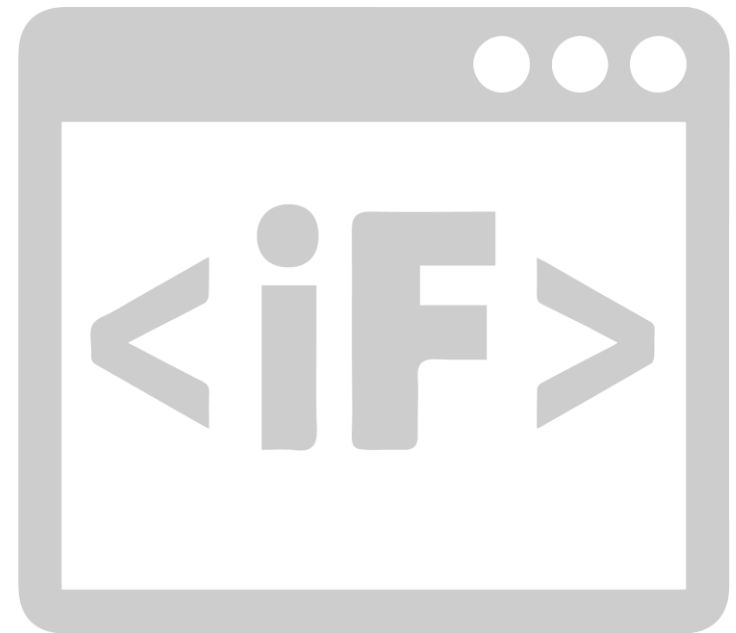
#104

Speed up the work with the media tab

This special kind of tab gives you a direct path to selected media. It optimizes work. Sounds boring? It isn't! For instance, if you take a picture during every on-site visit, you can add 'capture picture' tab to your appointments. This way you don't need to click through the notes to find the option to take a photo. Eventually, you end up cutting down on redundant, time-consuming clicks.
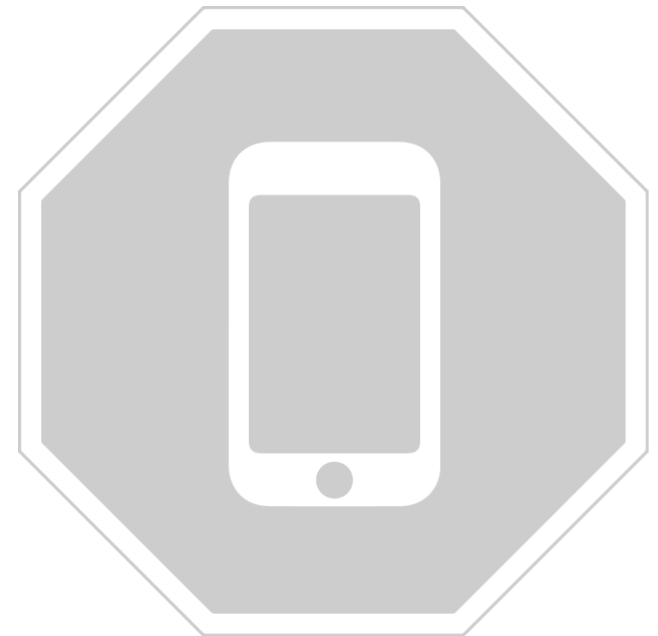
Section 11
Security

#105

Block all new devices or users

Want to make sure that the users use only the devices that you approved to connect to your CRM server? Then choose to block automatically all new devices. If you do that, users won't be able to access the server from a phone or a tablet that you have not approved beforehand.

#106

Lock or wipe the application remotely

No matter what misfortune meets you, you can keep your cool when it comes to the safety of your data.

System admins can remotely lock the application or wipe out data from it. They have a complete list of every device that has ever been connected to your organization and simply find yours on it. The list shows the owners, type of the device, ID number, even the time of last synchronization with the server, so it's easy to tell which one should be locked or wiped out from the distance. All is safe and sound.

#107

Remotely wipe out data from the app

Accidents happen–you might forget your tablet on a plain or leave it in a cab you take from work. But there's no need to panic if you lost a device with a Mobile CRM full of your valuable data. The system administrator will effortlessly remove all the CRM data stored in the device's local database. From the comfort of his office chair.

Admins can also set up an automatic wipe if the application has not connected to your CRM server for a defined period or if a user exceeds a specified number of incorrect password entries. So you can wipe away the concerns that your data could be exposed to prying eyes.
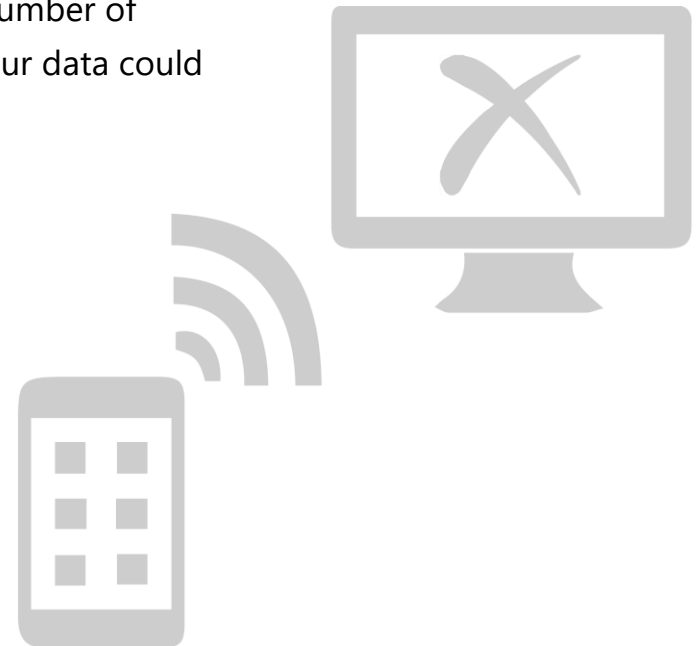
#108

Lock the app after a certain time of inactivity

To make sure your CRM data won't get into wrong hands, set up a session timeout. This will lock the application after a defined number of minutes and will ask for the password once you return to it. It's up to you to decide whether your timeout is going to be set for 15, 30 or 5 minutes.

#109

Use the advanced password-protection

Don't let anyone unauthorized access your CRM data. If someone attempts to log in but fails to insert the correct password, let's day 3 times, the application can preventatively lock itself or even wipe its data clean.

The system admin decides how many password attempts is the right amount and can also easily unlock the app afterward–it is just a matter of unchecking a box. Simple, yet effective.

The safety of your data is in your hands.
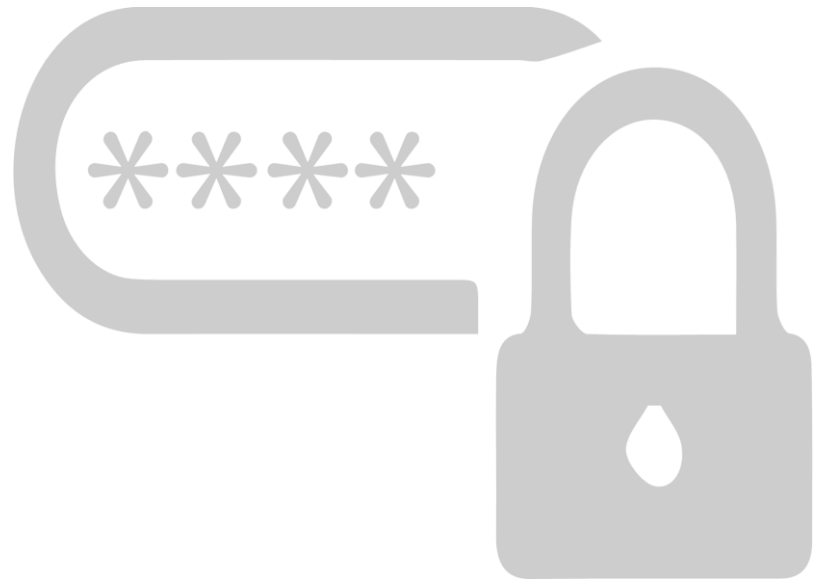
#110

Access some entities only in online mode

If some of the information stored in your CRM is highly confidential and you can't have it stored in the local database of a mobile device, you can make use of Mobile CRM's online-only entities feature. This means that the users will be able to access the designated entities only when connected to the Internet, and this data won't be stored in the device.
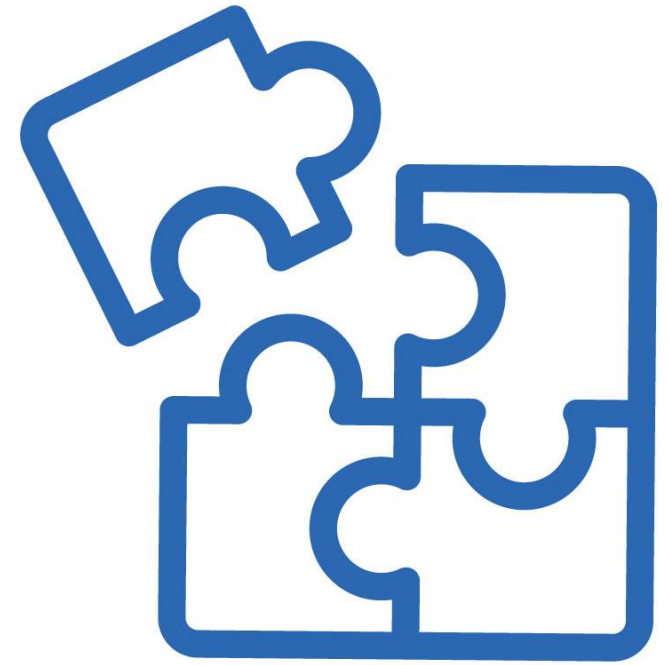
#111

Protect your data with MDM

The CRM data is a one of the main assets of any company and all the devices that access it deserve appropriate protection. Resco Mobile CRM supports powerful mobile device management tools such as Symantec and MobileIron.

Miscellaneous

#112

Look at your wrist, the future is here

Consider smartphones. Since their invention, no aspect of life has remained the same. They had an especially great impact on the business sector–thanks to smart mobile devices, the business now happens on the go, faster and more efficient.

With Apple Watch getting sold out in a matter of few hours just after the official pre-orders started, and other wearable devices flooding the market (Android Wear, Pebble, Moto 360, Sony Smartwatch, Google Glass, Microsoft HoloLens, new gears from Samsung, etc.), you should start considering what's the best wearable tech for you and your business.
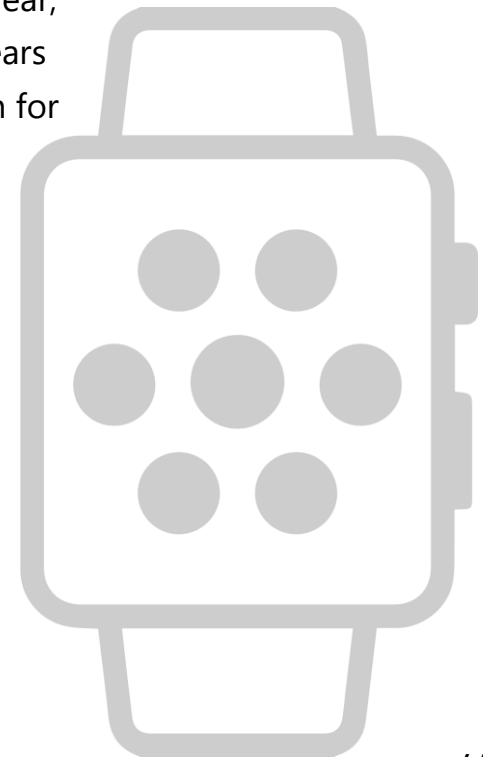
#113

Apt for every company

What version of Microsoft Dynamics CRM are you running? No matter what the answer is, Resco Mobile CRM is for you. It supports both, online and on-premise instances and all server versions (4.0, 2011, 2013, 2015 and 2016). On-premise customers can choose their preferred way of exposing the server: AD/AD with VPN/ADFS/IFD.

Are you running Siebel CRM, SAP, Gmail, or have nothing at all yet? There's also a solution for you–Resco CRM that lets you enjoy all the goodies of a mobile CRM while running on a different system than Microsoft Dynamics CRM.
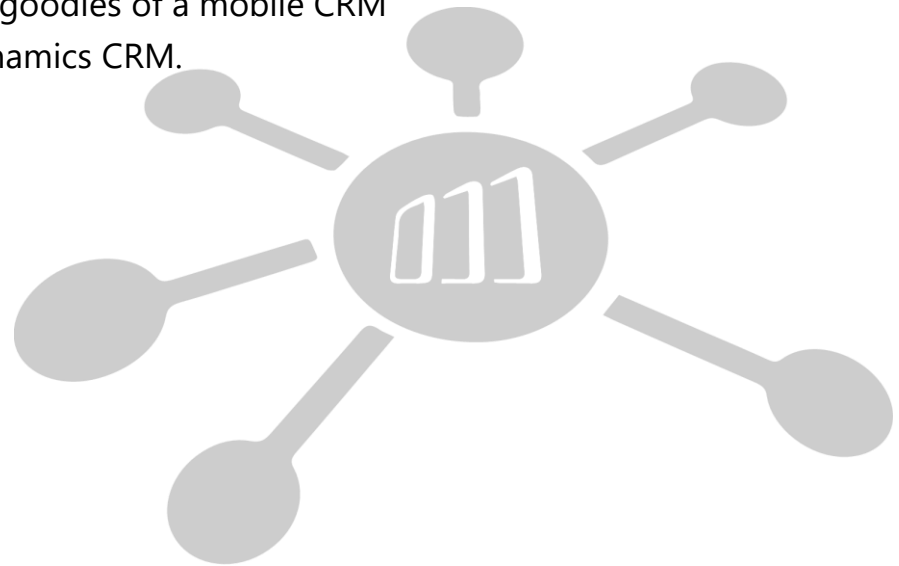
#114

Keep your custom entities & fields

If you customized your Microsoft Dynamics CRM server and now have your own, custom entities and fields, you can have them in the mobile app as well. Simply add them to the app with the easy-to-use Woodford configurator and you're good to go.

#115

Access data offline even from your PC

The standard approach is to access your CRM via a browser. Makes sense—that's how it's supposed to be. But what if? What if you could use a CRM application on your desktop/laptop?

Why?

Because you would have offline access to your data! Browser access can get slow at times, and when the Internet goes down, the whole company is paralyzed and losing money minute by minute.

#116

Opt for a simpler user interface

The Mobile CRM desktop application is a great way to offer employees another user interface. Maybe your users find the browser interface of Dynamics CRM confusing, unattractive or cluttered. Resco Mobile CRM desktop client will address all of these issues. It can become a lightweight client for those, who need to perform simple tasks and want to do it as easily as possible.

Section 13
It's the little things

#117

If you like it, put a pin on it

If you frequently access certain records, pin them to your Favorites–a special section that lets you make a collection of various records. This cuts down on unnecessary clicks, which is ultimately a nice time-saver.

Say you are a sales person working on some opportunities this week (you'd like to close them successfully). You are also planning to follow up on a couple of existing customers; trying to obtain references. And you need to check if the payments for last month's orders already arrived. It makes perfect sense to add these specific opportunities, accounts, and orders into your Favorites. This way you don't need to search separately for a handful of records each and every time you need to look up a detail. Favorites make your life just a bit easier.
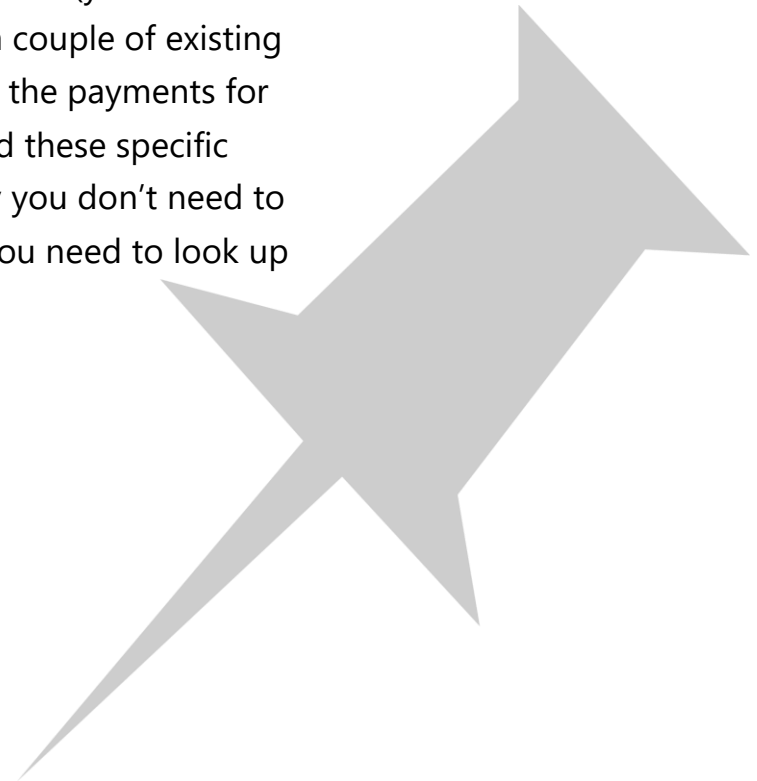
#118

Don't let the people wonder what to type in

We've all been there–filling out a form, trying to figure out what to type into a box, whose label doesn't tell us much (government forms, we're talking to you now).

Don't let your users wonder—give them a helpful hint. In mobile CRM app, you can do so by inserting a placeholder text into a field. A placeholder text indicates a sample value or a short description of expected input so that people know right away what to put in. Either way, it's going to avoid confusion because users won't just wonder what to type in, they will know it with certainty.

You've already encountered it many times, without realizing it. Like a password "Must be at least 6 characters long" and a telephone number should "Include the county code".

The short hint is displayed in the field before the user enters a value. The familiar light gray color makes it easy for everyone to recognize it's a hint that should be replaced with real data.
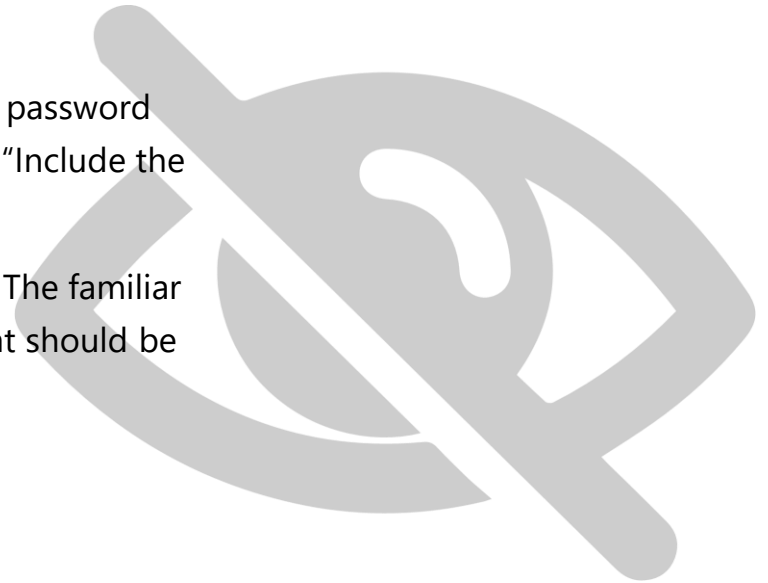
#119

Use iPhone's Touch ID to access your CRM

Why type in your password to log on to your CRM when you can just use your fingerprint? It's unique and practically impossible to copy. Use iPhone's Touch ID, a fingerprint identity sensor, to access your CRM even faster.

#120

Speak your language

Not digging English? No problemo! Or shall we say: pas de problème, कोई समस्या नहीं, kein Problem, нет проблем, žiadny problém, ei hätää, no hay problema …

Point being, Resco Mobile CRM speaks your language, whichever that may be. You can choose from default ones or add a new one from your CRM system.

#121

Dead-simple to use

An app has to be easy, intuitive. So users will actually use it. And not frown while doing so. Resco Mobile CRM is touch-friendly (no small buttons anywhere), fast (the response time is off the charts) and intuitive (you just know what to do straight away).

#122

Create your views as you go

Every time you need to filter data relevant to you, you can do it by creating a custom view. If your colleague is on a vacation and you are taking care of his accounts during his absence, you can create a view that lists only his accounts. You don't need to ask your system administrator to create views for you—you can do this all by yourself. Just fill in a few conditions and there you have it. Once you don't need one or the other view anymore, you can simply delete it.
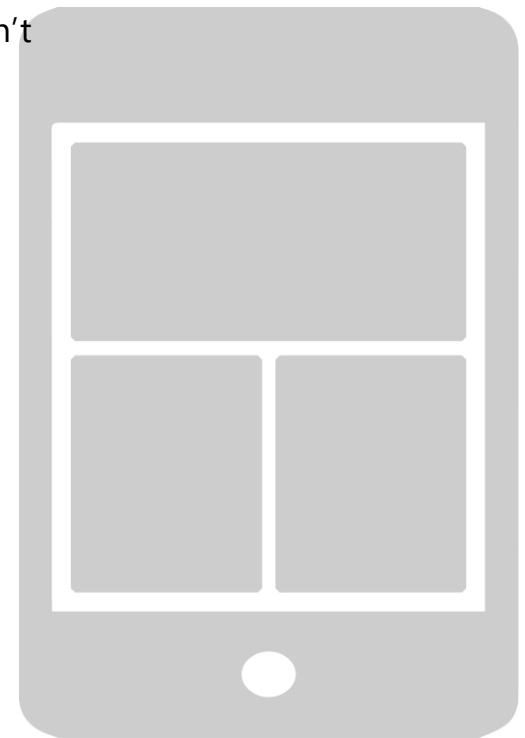
#123

Swipe left to reveal inline action buttons

What do you do when you need to get in touch with somebody? You call or write an e-mail, obviously. But for these actions, you don't have to go to your phone app or open up a mail client. You don't even need to open the contact's record.

When you have found the person you wish to talk to in your contact list, simply swipe from right to left across his/hers name. This will bring up inline action buttons that let you call or send an e-mail instantly. It's simple, fast and efficient.

#124

Drag & drop to schedule activities

Something came up, and you cannot make it to that sales call you had planned for tomorrow morning? Make sure you don't forget to reschedule. And when you do, you simply move around the appointment in the calendar just by swiping across your screen. You can be jumping from Monday to Friday, from June to December or even between different years literally by moving your finger.
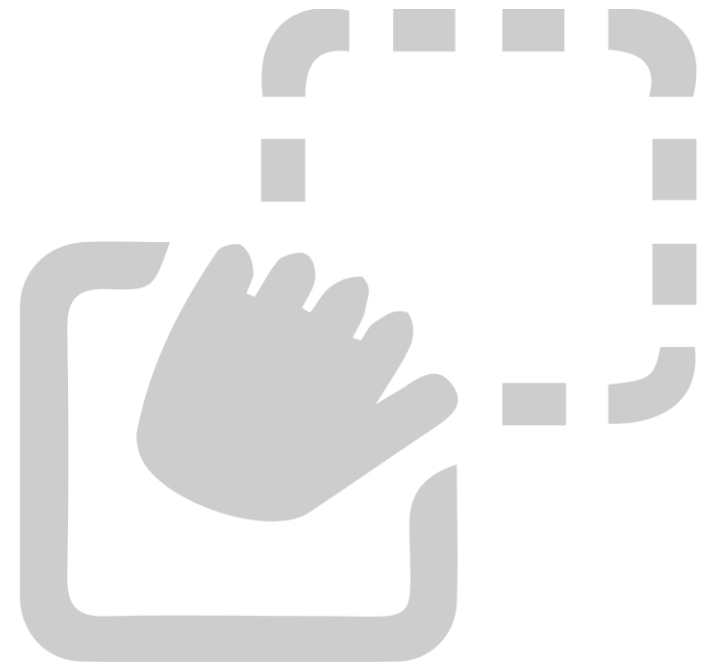
#125

Say it clearly

You know those lengthy display names of fields? Like this one "Final Proposal Ready" or this one "Do Not Allow Bulk E-mails" or "Total Line Item Discount Amount"– there are loads and loads of them.

Well, if you would put them into your mobile CRM app, they'd be cut short because of the small screen size at your disposal. Not only would it look strange, but it could also mean that sometimes you won't be sure which field is which. And what to do with it (how to fill it in). And that's when our localization feature comes in handy.

You can mutate the language of your app, meaning you can change the display name of fields, commands and other elements present in the app, so that everyone will know what each field means.

One little change = one (probably more) no-longer-confused user.
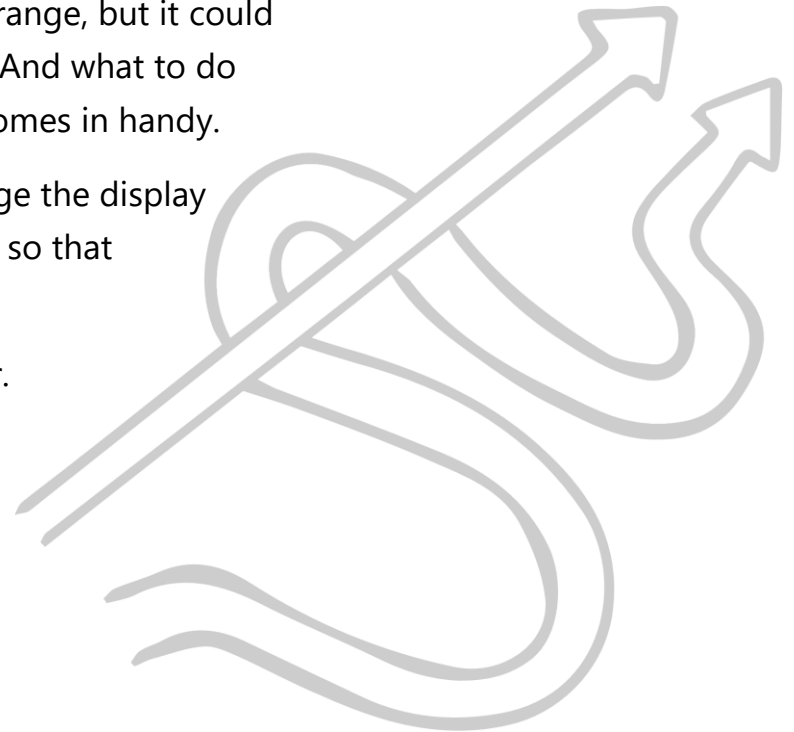
#126

Color-code activities in calendar

Give your calendar some clarity and help your users identify activities. You can do so by defining colors for activity types on the calendar. For example: make your Appointments blue and Tasks red. Differentiate tasks with high priority from those of a lower one. Or assign a color to each user of a shared calendar.
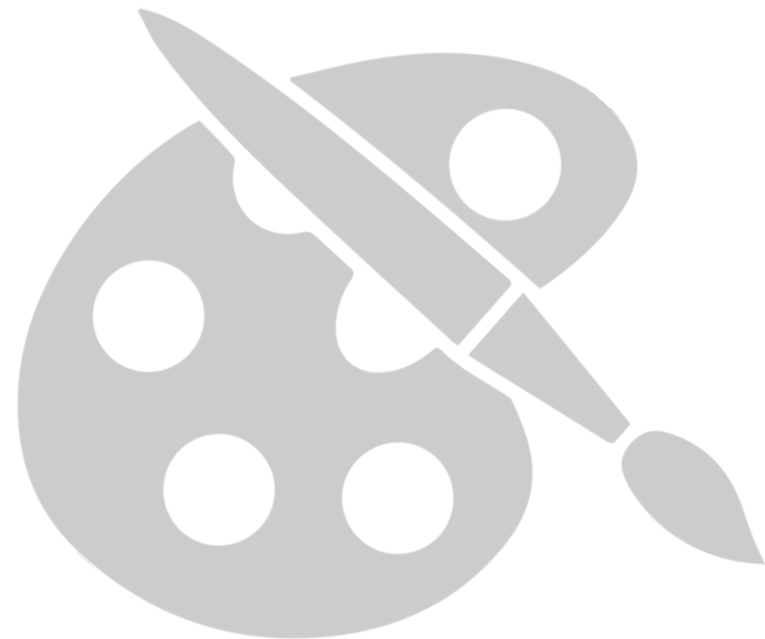
#127

Native apps that let you act on your instincts

In any app, you mainly want to perform a task. But as you're trying to accomplish just that, you don't want to think about how things in the app work and you certainly don't want to be facing something unfamiliar.

A well-designed app needs to allow users to **work intuitively**, to **avoid any confusions and delays**. That's where native user interface immensely helps. All proper definitions aside, native user interface simply means the mobile app looks like and behaves as if it was made for that particular phone or tablet. This includes a number of things such as warning messages, placement of buttons, navigation, transitions and gestures. **All is where it should be, as it should be.** Otherwise, users won't feel quite at home.

"When the warning message looks like something that wants your attention, you'll pay attention to it."
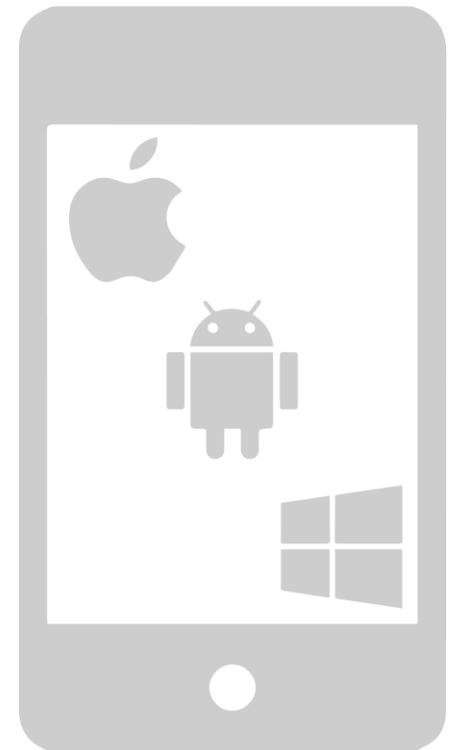
#128

Get a closer look at this

Mobile CRM has to function on a smaller screen. Therefore, each inch of space is a highly valued property. So to make things work well, the app has to be smart about how it uses space. Even small things like minimizing the main menu if you don't need it or enlarging the form to full screen if you're working on a tablet can make a difference in how comfortably you can work.

#129

## Have numerous devices, but only one user interface

Our native apps are designed from the ground up with consistency in mind. Whatever platform you prefer you will always get the same great user experience. You can work in a familiar environment across a vast array of devices. So on each phone, tablet or PC, you'll know immediately where to go and what to do.

#130

Let's sort this out

Different things are important to different people. If you don't fancy your lists organized alphabetically, you can sort them by priority. Or any other way you like. Flexible sorting options ensure your lists are arranged just the way you need them to be, with the important things on top.
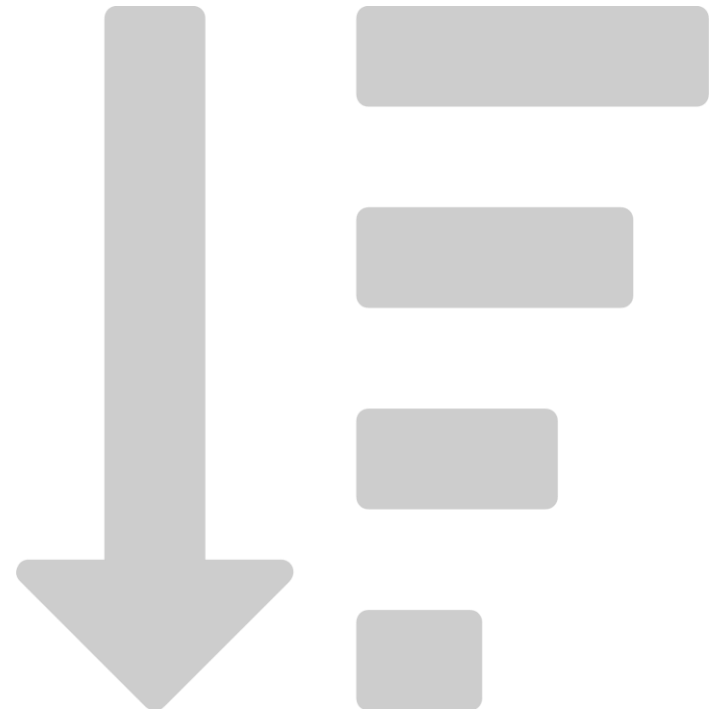
Conclusion

Let come back to the questions we've asked in the beginning.

1. What are the benefits of mobile CRM?
2. Does it pay off to invest in a mobile CRM solution?
3. How can we use a CRM app in our scenario?
4. How can we improve our current mobile solution?
5. What is there to know that I don't know yet?

After reading through this book, you should be able to answer all of these questions with ease.

As you can see, Mobile CRM allows you to take your CRM to a completely new level. It does it all: improves productivity, streamlines processes, engages your customers and helps you do your work with dozens of amazing functionalities.

Mobile CRM is here — all you need to do is take advantage of what it has to offer.

Over to you

Interested in trying our Resco Mobile CRM client for Microsoft Dynamics CRM? Get in touch with us at, so we can help to get your mobile CRM project off the ground.

Keen on implementing new features you didn't know about until now? Great! We're always happy to help you make your Resco Mobile CRM even better than it is.

Get in touch with us via http://www.resco.net at mobilecrm@resco.net or

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