

Meet Resco Cloud

Ultimate Guide to a Mobile & Desktop Solution

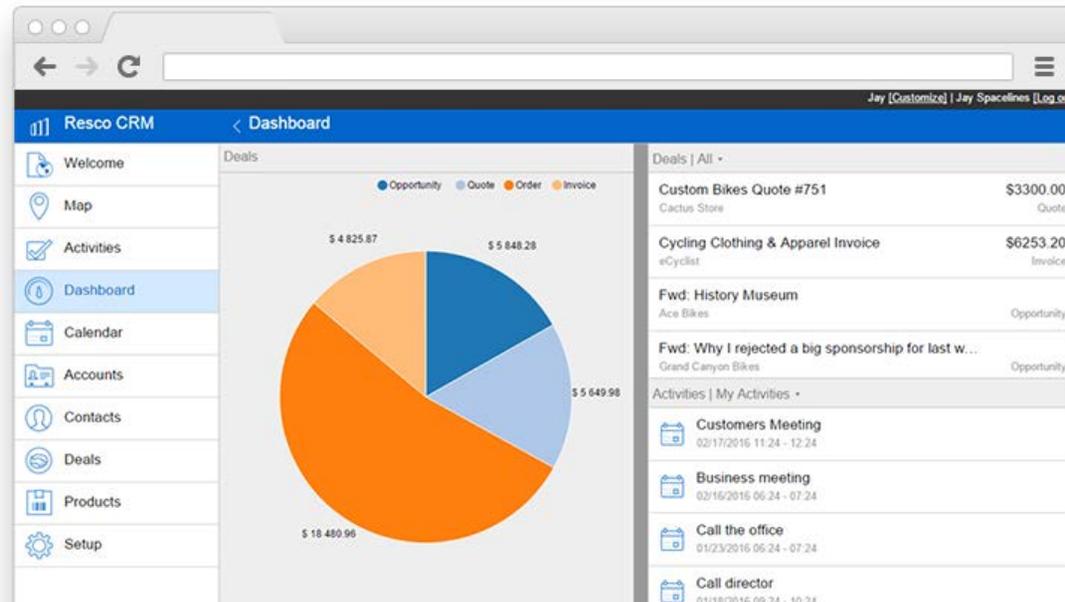
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1 Introducing Resco Cloud

1.1. What is Resco Cloud

Resco Cloud represents **Customer Relationship Management Solutions** optimized for mobile users with **offline access** to everyone.



Resco Cloud makes for a powerful desktop & mobile solution even on its own as your CRM of choice.

It encompasses not only the technological aspect but also the processes of running your business - **Sales, Field Service, and Consumer Apps.**

The core of Resco Cloud Technology is the cross-platform mobile solution with **advanced configuration capabilities** (i.e. is available for all iOS, Android and Windows users). The app — which gives users around-the-clock access to their CRM data from anywhere — comes with true offline mobility, interactive route planning, support of custom entities, designable dashboards & numerous other attributes that make it a market-favorite product.

Resco Cloud comes as a whole package, including a fully-functional CRM system, internal SDM (Security Device Management), Mobile Audit and a Route Planner.

Resco Cloud is an all-in-one enterprise solution that meets the needs of both, mobile workers (sales & service agents) and back-office. It can also be connected to other back-end corporate solutions, such as **Salesforce, Microsoft Dynamics CRM, Oracle CX** etc.

1.2. Capabilities of Resco Cloud



Add New or qualify existing leads



Create, Delete or Edit Contacts & Accounts



Note taking



Dashboard & Charts



Convert Opportunities to Won or Closed



Multimedia Support (documents, photos)



Activity Management



Personal Views



Check and Edit Orders



Email Integration (Exchange, Gmail)



Route Planning



And more...

1.3. Who should use Resco Cloud

Resco Cloud is a solution for **businesses of all kinds with a mobile workforce**. It offers the greatest perks for salesmen, service technicians on the go, real estate agents, financial advisors, controllers and other mobile workers. Although, it is an independent CRM tool, Resco Customer Relationship Solutions are often used as a powerful mobile edge for Salesforce, Microsoft Dynamics CRM, Oracle CX, and other popular Enterprise Solutions.

3 Use Case scenarios

1. **Sales Reps** — to optimize their performance and increase efficiency by drastically reducing administrative tasks.
2. **Service Technicians** — to cut down their time and costs spent on traveling by optimizing their route and eliminating paperwork.
3. **Back-Office** — to coordinate, track & monitor corporate field workers by real-time data information.
4. **Corporate Allies** — to connect with customers, partners, volunteers, fans, and general public by creating consumer apps.

1.4. What are the main benefits of Resco Cloud



Elimination of switching between multiple tools

Email, CRM, route planner, calendar, auditing, SDM and others are all in one place, in one cloud.



Cost effectiveness

Resco Cloud offers great functionality for a very reasonable price, mobility is included within the price.



Offline functionality

The solution works with full functionality, no matter the Internet connection.



Increased user adoption

Employees who get mobile access to data are likely to adopt faster and use it more because of its simple and intuitive interface.



Secure, safe & protected data

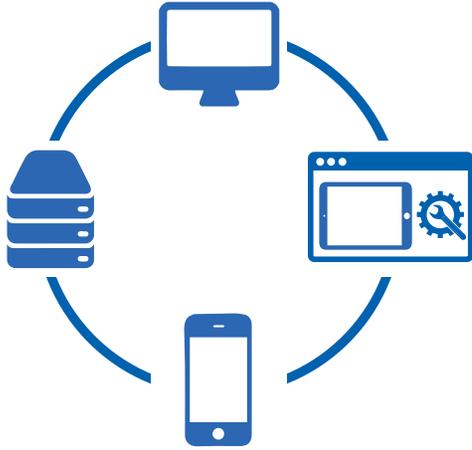
Security Device Management incorporated within Resco Cloud secures data, users & their processes.



Mobile Audit

Analyze whether or not the solutions are being utilized, how often, by whom, how exactly, and where.

1.5. What does Resco Cloud consist of



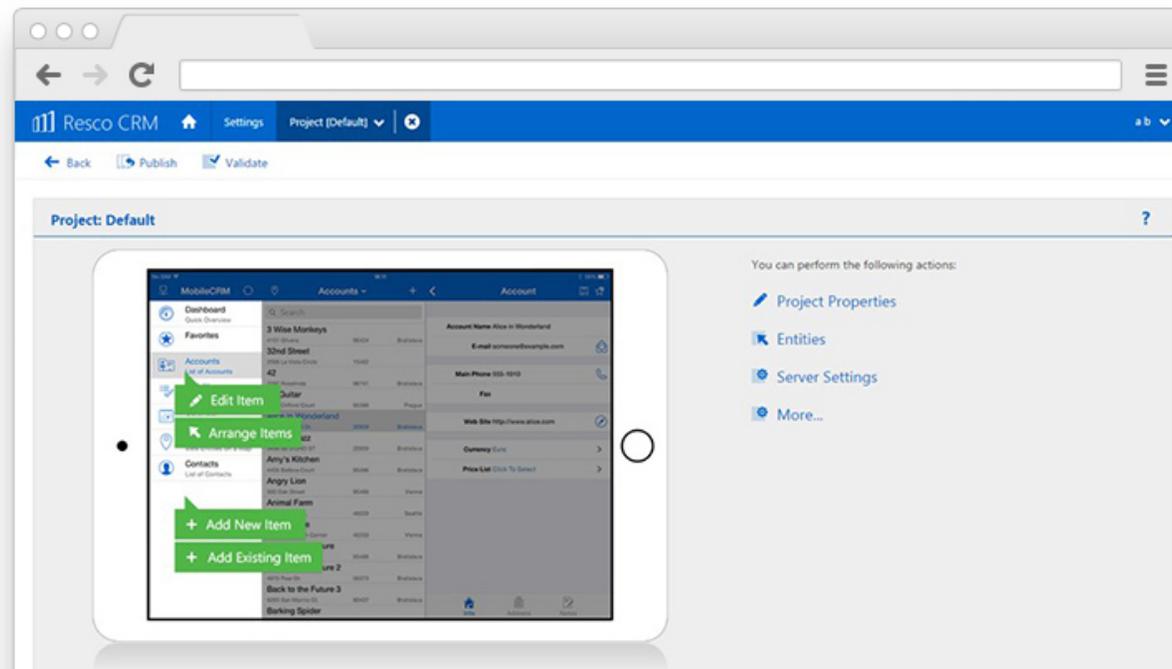
1. **Resco's database** — a data storage with customizable data scheme that can operate via public or private cloud.
2. **Mobile app** — works both in an online & offline mode and is available to users on all major platforms.
You can gain access to the mobile client of Resco Cloud via **Android, iOS and Windows**. [Start a free trial](#) at Resco's website.
3. **Desktop solution** — offers a convenient and fast access to all CRM data for the desktop users. Learn more details about the [desktop solution](#).
4. **Woodford Configuration** — a tool that lets users to configure the Mobile Application and deploy it to all corporate devices at once.
5. **Customization Console** — comes with Resco Cloud and is only needed for those who use no other back-end technology.
This is where you make all the customizations and configurations when you utilize Resco desktop solution. The changes, such data management, data import, UI customization will then appear on your web and mobile clients – all without coding.

Chapter 2 looks at the configuration & customization capabilities.

2 How to Customize Resco Cloud

Resco Cloud & its advanced customizations

You are able to create customized projects within the Resco Cloud solution. Each project created in the Resco Cloud and can be adapted to a specific business need. **The complete UI: look of the lists & forms, business logic or visible content is modifiable**, so you can change it easily to fit a certain scenario.



All the customizations can be made in the Customization Console that is a part of the Resco back-end system. For start, you need to log in to your Resco organization at www.rescocrm.com.

To begin customizations, click on '**Customize**' in the upper right corner of the home screen. Click on '**Publish**' after you make changes, so they become visible on the web and mobile clients.

The Customization Console allows you to:

- define views, forms, and charts
- modify metadata: add or edit entities and fields
- arrange items: make the home section work for you — add, delete, or move items as you need on the home screen
- create own business logic with rules and commands: define custom business logic that will allow you to e.g. color-code records or create a calendar rule that will prompt users to fill in the location when creating an appointment
- create different versions for different uses: create different projects (mobile applications) for different user security roles
- change the client's appearance: use various colors, images, etc. for each app
- and more...

3 Integrations that Expand Your Assets

We understand that there are other competitive solutions out there, and being able to integrate and work together, is key. See below, whom we've partnered up with, so you could be able to connect Resco Cloud with a 3rd party solution with ease.

Back-end systems:

Microsoft Dynamics CRM, Salesforce, Oracle CX, SAP

The Resco Mobile solution communicates with any given 3rd party server via Resco Cloud that works as a connector.

Therefore, you can deploy both solutions in one company — they'd be able to work alongside each other.

Contact us at mobilecrm@resco.net to learn how to easily connect the Resco Cloud Organization to systems mentioned above (or other backend systems not mentioned).

Popular Apps & Tools:

SharePoint, Google Apps for Work, Dropbox, Exchange

Access, modify & upload new SharePoint, Dropbox and Google Drive documents, track your Gmail and Exchange emails and more – even with no Internet connectivity.

4 Getting started with Resco Cloud

4.1. Creating the CRM organization

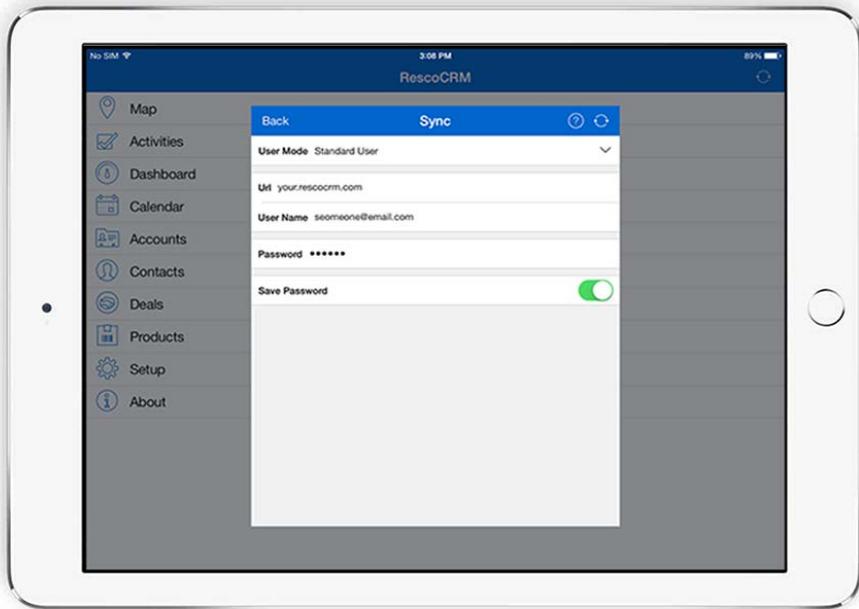
1. Visit the web site www.rescocrm.com.
2. Hit the **'Start your free trial'** button and fill in the basic information about your CRM organization.
3. You will receive an email with the activation link.
4. Following this link will allow you to complete the registration process.
5. Using the sample data will help you better understand the architecture of Resco Cloud Solutions at first sight.
6. You can immediately start working with the desktop solution.
7. Watch the [webinar recording](#) that guides you step-by-step through creating an organization.

4.2. How to start working with the Resco Mobile app

Download the Resco Mobile CRM app from [Resco's website](#) or from your store ([Google Play](#), [App Store](#) & [Windows Store](#)).

To synchronize the app, follow these steps:

- tap the Sync button
- select the user mode 'Standard User'
- fill in the URL of your Resco CRM organization that was specified during your registration in a received email
- type in your Username (your registration email) & Password



Then just tap the Sync button again to synchronize the app with the Resco Cloud Organization.

4.3. Online vs. Offline mode — how does it work

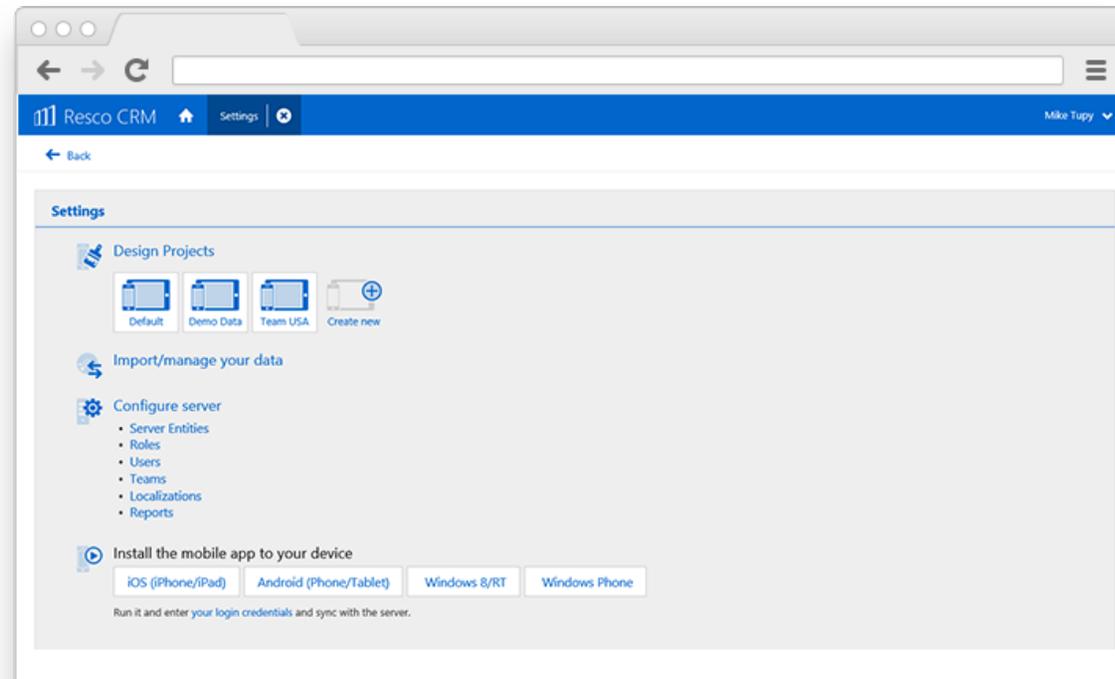
In the **Online Mode**, you are directly connected to your CRM system and are always accessing real-time data from it.

However, the app can also store data in your mobile device. Thus, via the **Offline Mode**, you are still able to access and work with your data, even if you don't have an Internet connection available. The changes that you make (create a new account, edit an order, etc.) will be reflected on the CRM solution you utilize (Resco, Microsoft Dynamics CRM, Salesforce or others) the next time you synchronize the app.

4.4. Importing data to Resco

Every single change (when utilizing Resco backend system only), e.g. data import is being done in **the Customization console**. To delete the demo data under the selected entity, go to Edit existing item → entity. There is an option to delete the data under the Manage data section.

To import new data into Resco, go to Settings in the Customization console, click on Import/Manage your data. Records can be imported from Gmail, Exchange, and LinkedIn or even a CSV file.



Watch this [video](#), where we describe how data management in Resco Cloud works.

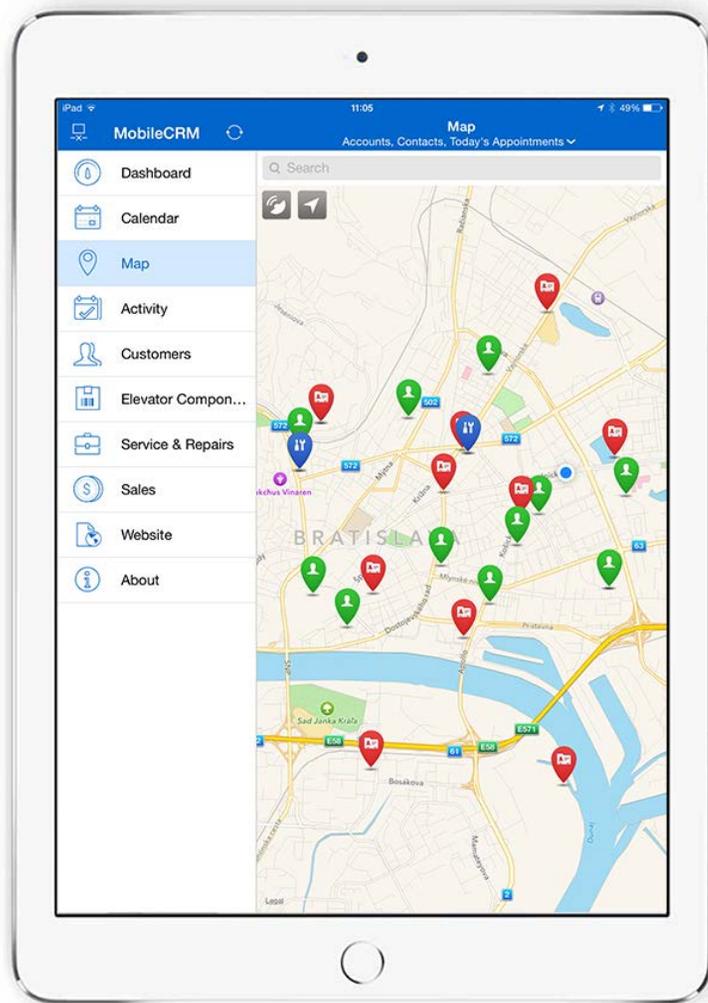
5 Exploring the features



Dashboard



Dashboard can show orders, opportunities, and even cases. It is the overview of what matters to you the most, whether it is the highest-rated deals or recent claims from customers.



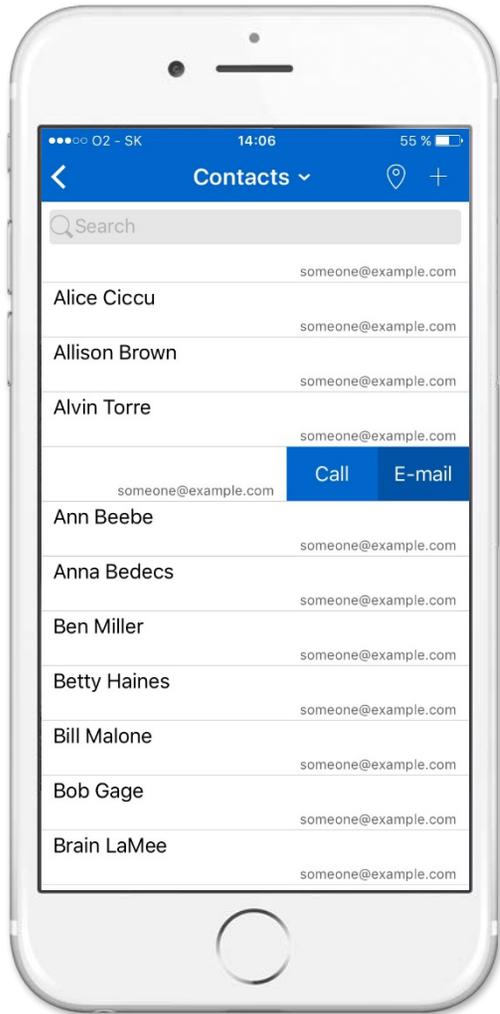
Map & Navigation



The interactive map shows your **Accounts**, **Contacts** and **Deals**. This way, you can catch up with the customer closest to your location.

You can zoom in, zoom out and select a record by tapping on it. When you select a record, you can view and edit the details. Or open a record and click the **Navigate To** button.

Note: The map works with the GPS coordinates, that is with "latitude" and "longitude" fields instead of the address info.



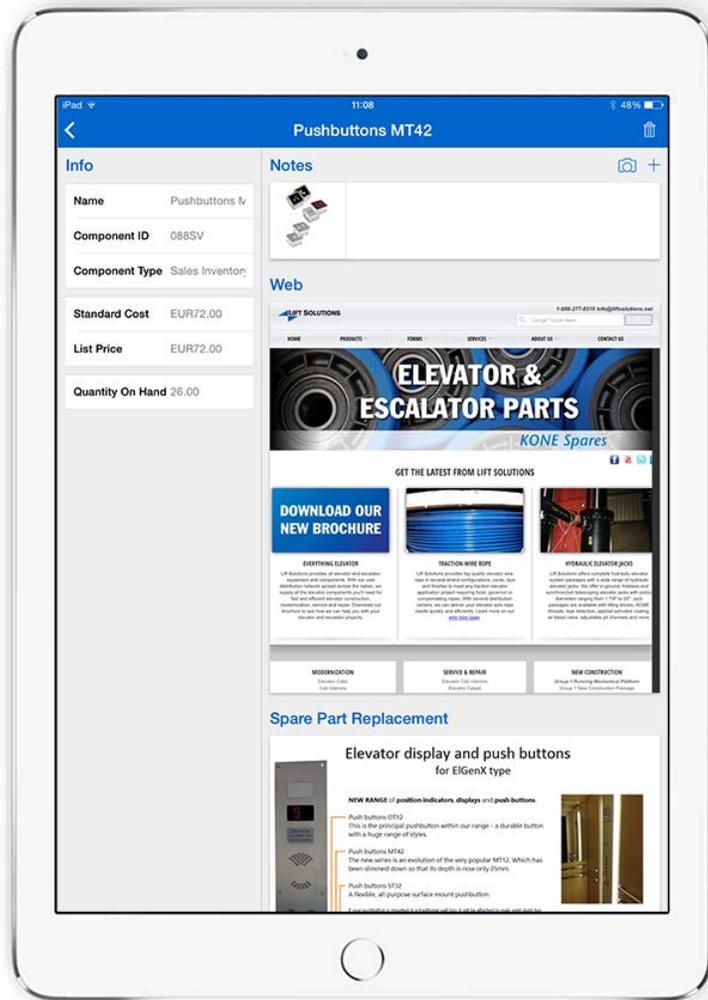
Call



You can make a call directly from the app.

Go into a record and tap on the phone icon next to a phone number.

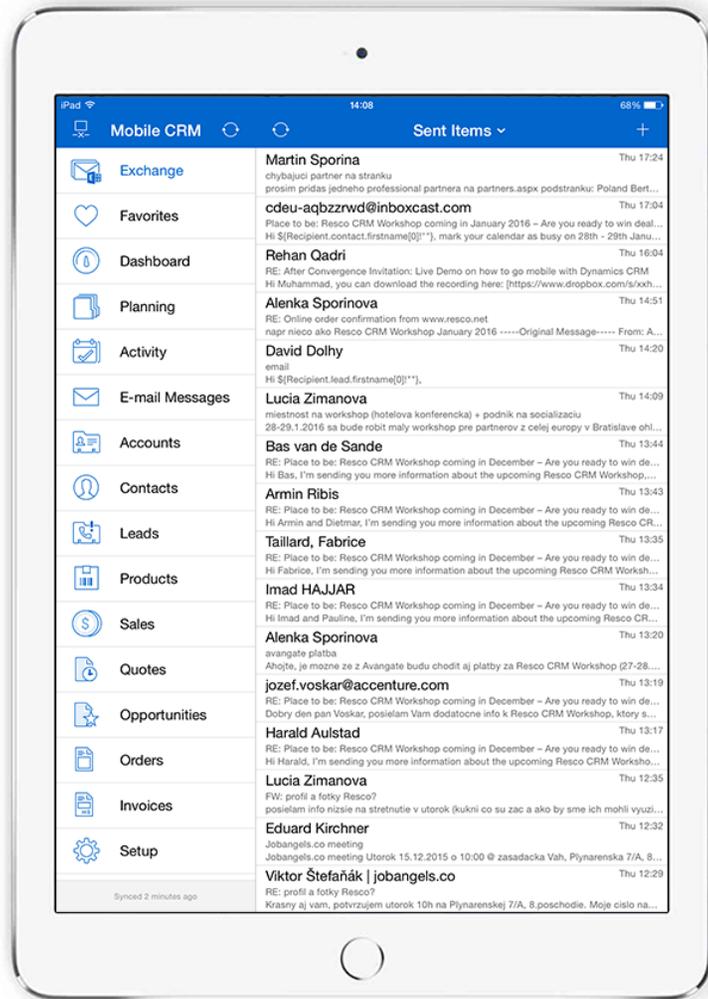
On iOS devices, you can also swipe your finger from left to right to display a call button.



Iframes



Iframes allow you to bring in custom elements into your CRM. Use them to access customers' websites, your intranet or get the latest scoop on your prospects by quickly looking at their internet presence. Iframes work both online and offline.



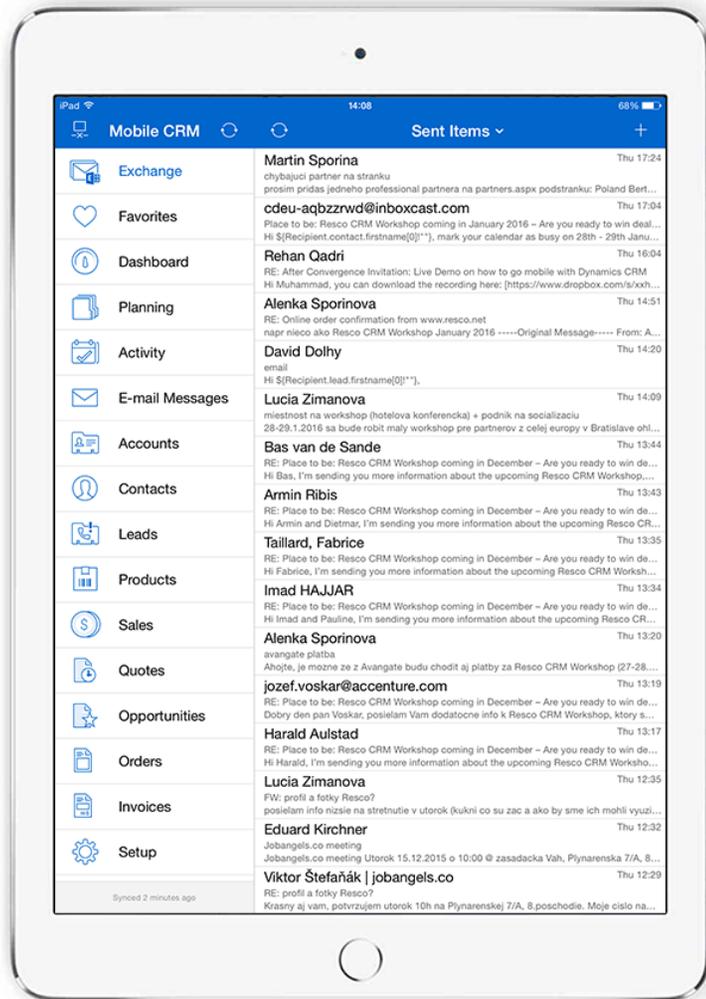
Email Integration



The support of Gmail & Exchange in your Resco Customer Relationship Solutions means you are able to work with your messages directly in your CRM system. You can create new messages, reply or forward them without switching between multiple applications. The integration also lets you convert the messages into Accounts, Contacts, and Deals.

To connect to the Resco CRM organization with your email, sign-in to your Resco CRM account with your Google account. Choose the email account you want to connect to your CRM organization. Now, select Gmail entity from the list. All the categories and subfolders you use in your Gmail client are now translated to Resco CRM.

What does email integration within CRM mean?

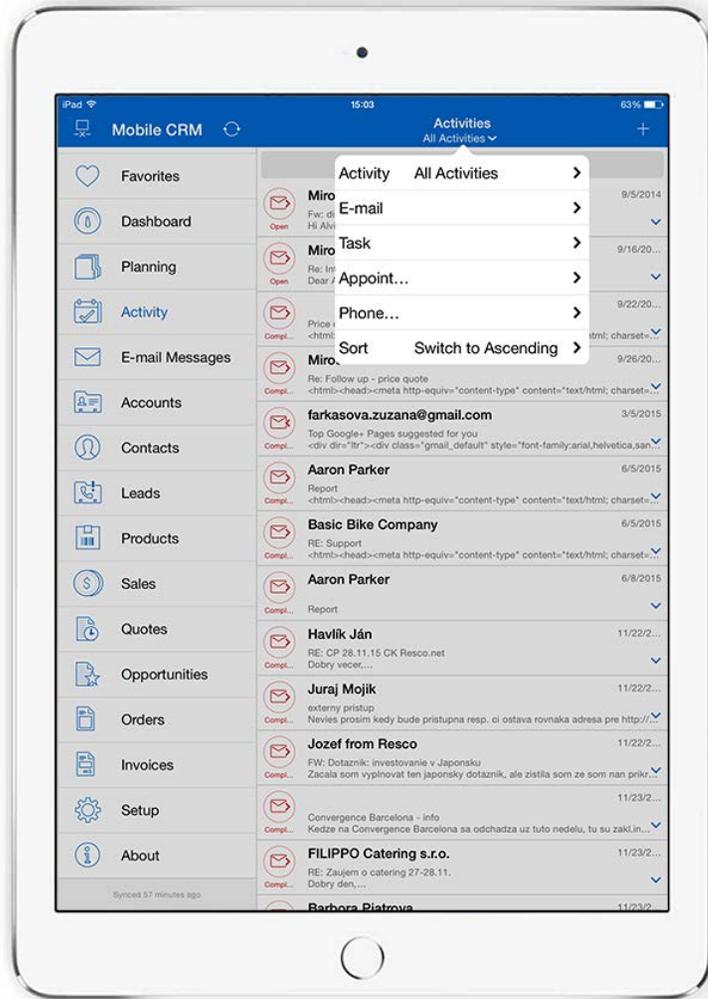


Working with an existing deal

Go to your Inbox and open a message – it can be from one of your existing accounts – or a customer that you have been in touch with for a while. You can see that this is your existing account when you look next to **'Regarding'**. Once selecting the deal (in 'Regarding') — all the Account details will appear. There is the entire email communication with this account/company displayed in **'All my activities'**. You can also select and move this message to a unique category. All these changes and transitions are automatically made in your email client too.

Creating a new deal

When you receive an email from someone who seems to be your potential customer, you can create a new Contact directly from the email message. Select **'from'** and click to create a Contact. To convert this message into a deal, click on the action button in the upper right corner and choose the respective option.

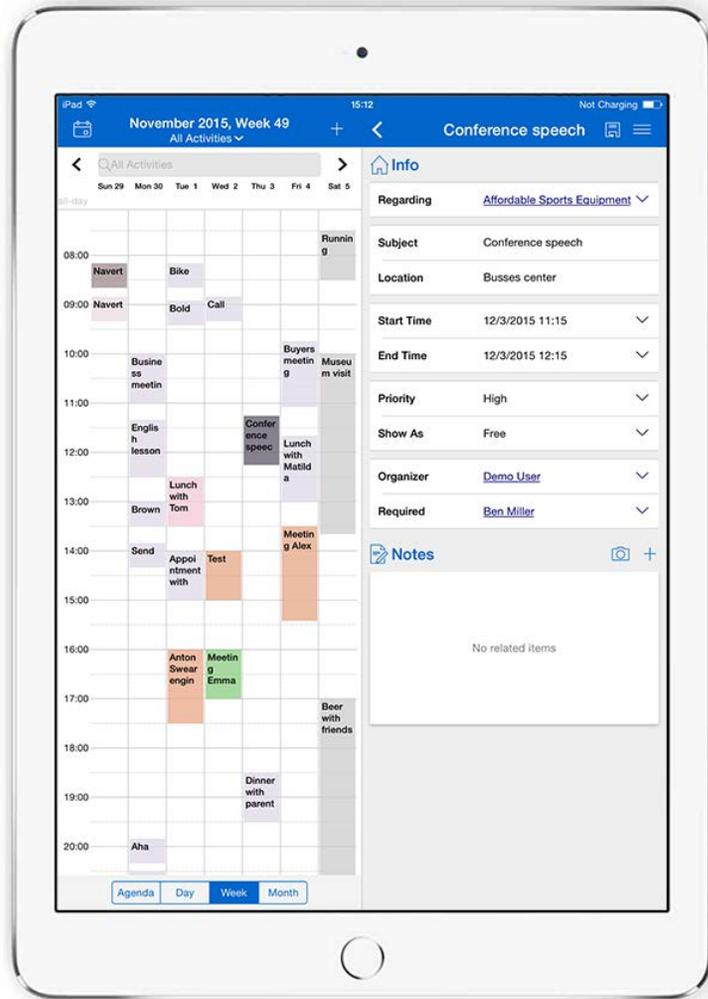


Activities



Add an activity: Appointment, E-mail, or Task.

You can write in and edit details about each (such as, the location and time), convert them to opportunities or cases, or just mark them as complete.

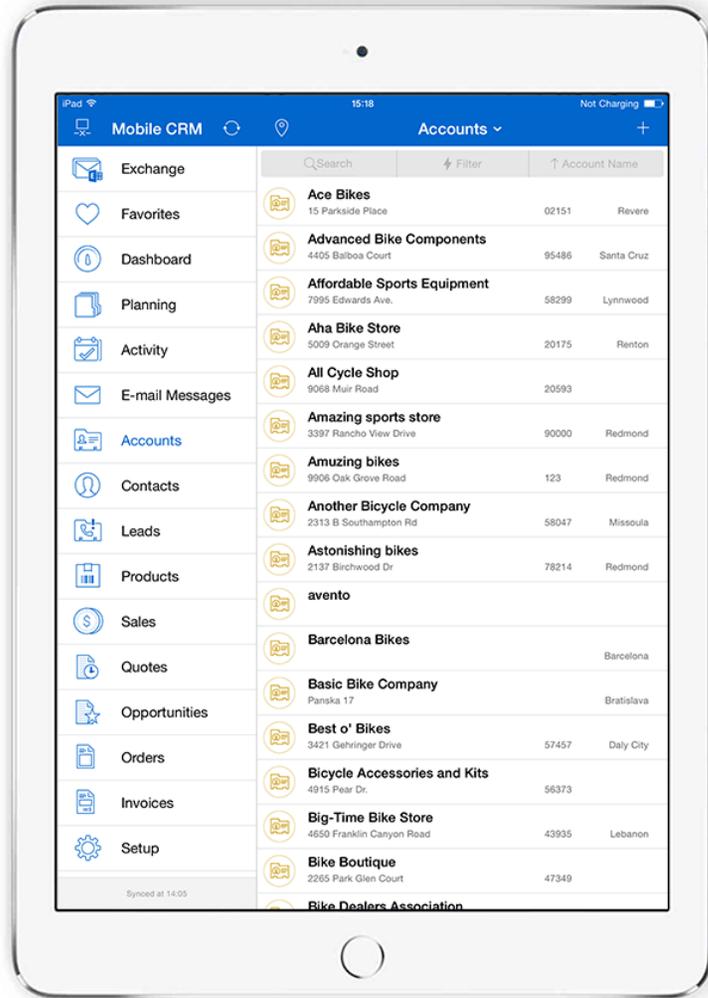


Calendar



Calendar offers different views (Day/Week/Month/Agenda) of your appointments and activities.

Create a new one by tapping and holding your finger on the screen or reschedule it by sliding it into a different section.

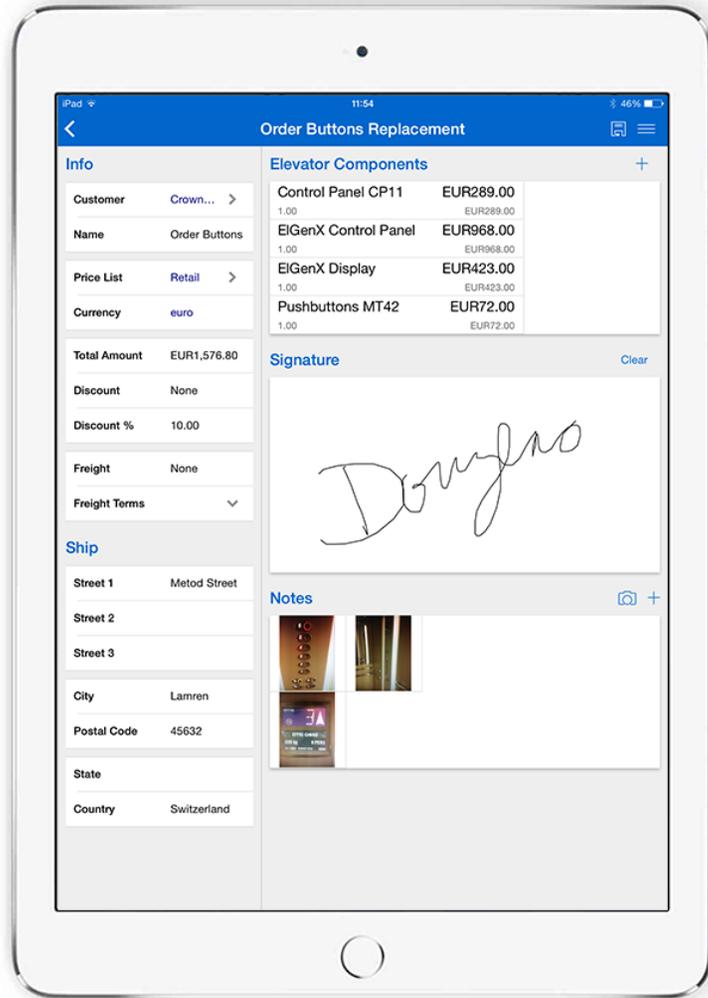


Accounts, Contacts & Deals



With Accounts, Contacts & Deals you can:

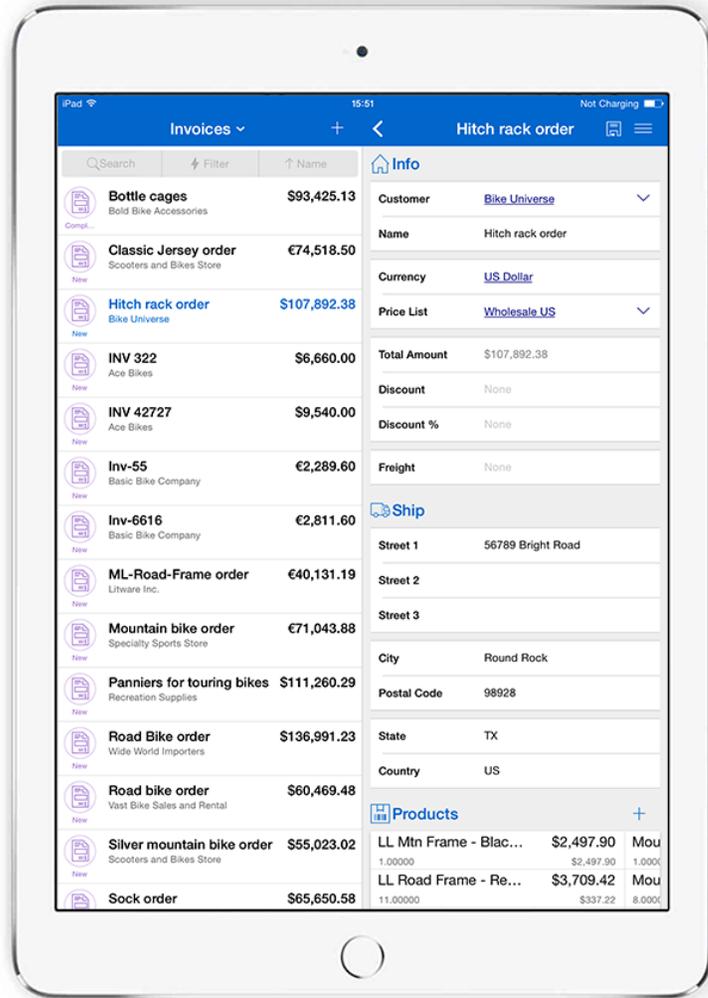
- add new records, edit & delete them;
- switch to a map view to display their location;
- browse associated fields sorted in tabs (Info, Map, Contacts, Quotes, Orders, Activities, and Notes)
- qualify or disqualify Leads



Attach notes, photos & signatures



Tap the "+" button to create a new note. You can also add an attachment to it. This could be a picture, a video, or even a signature.



Deals — Opportunities, Quotes, Orders & Invoices

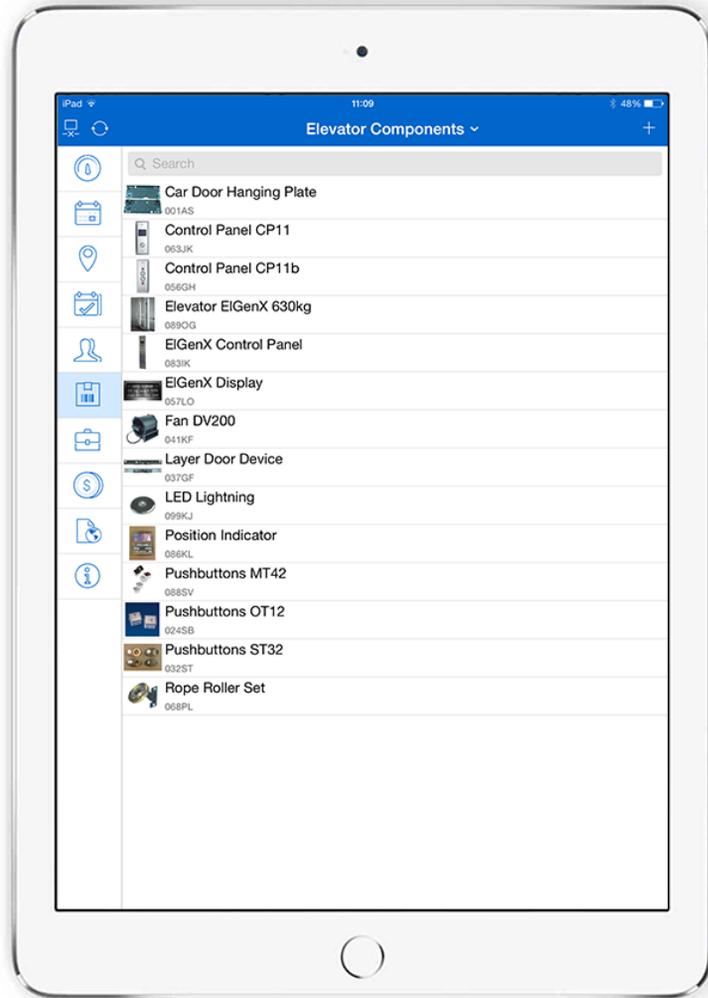


Manage all your Opportunities, Quotes, Orders, and Invoices in different stages.

Opportunities, Quotes, Orders, and Invoices in Resco Cloud are not standalone entities. You can find them under the Deal entity and choose from the dropdown that will appear. This has proven to be more effective for simple sales – the user can immediately and quickly change the status of each Deal. If needed, there is an option to show them as single entities.

How can you manage the deals?

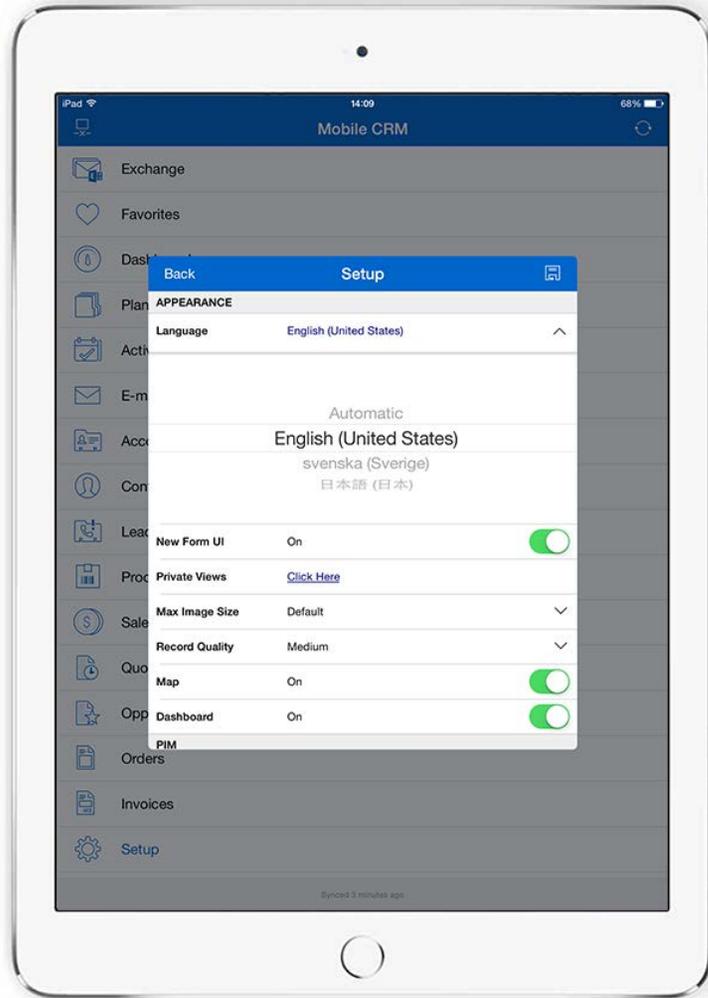
- convert Opportunities to won or closed
- control the Quote from a draft through active to closed to won
- get products from an Opportunity to Quote draft, Order or Invoice
- set the right status for your Orders and Invoices (complete, partial, or canceled)



Products



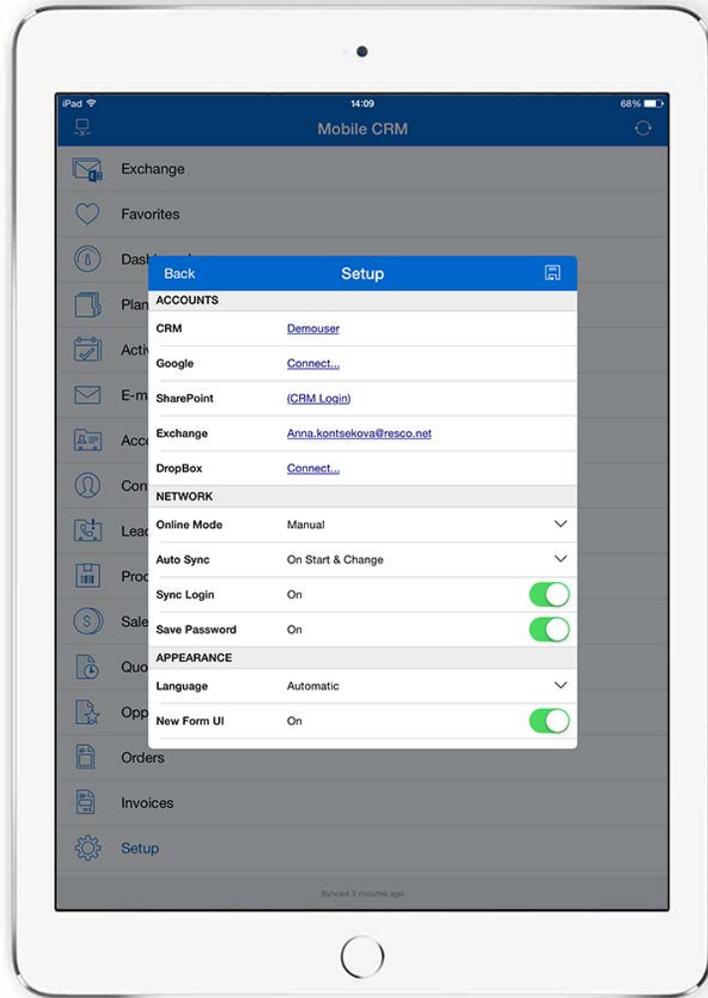
Carry the overview of all your products with you. Browse through the product name, ID, type, standard & list price and quantity at hand.



Localization



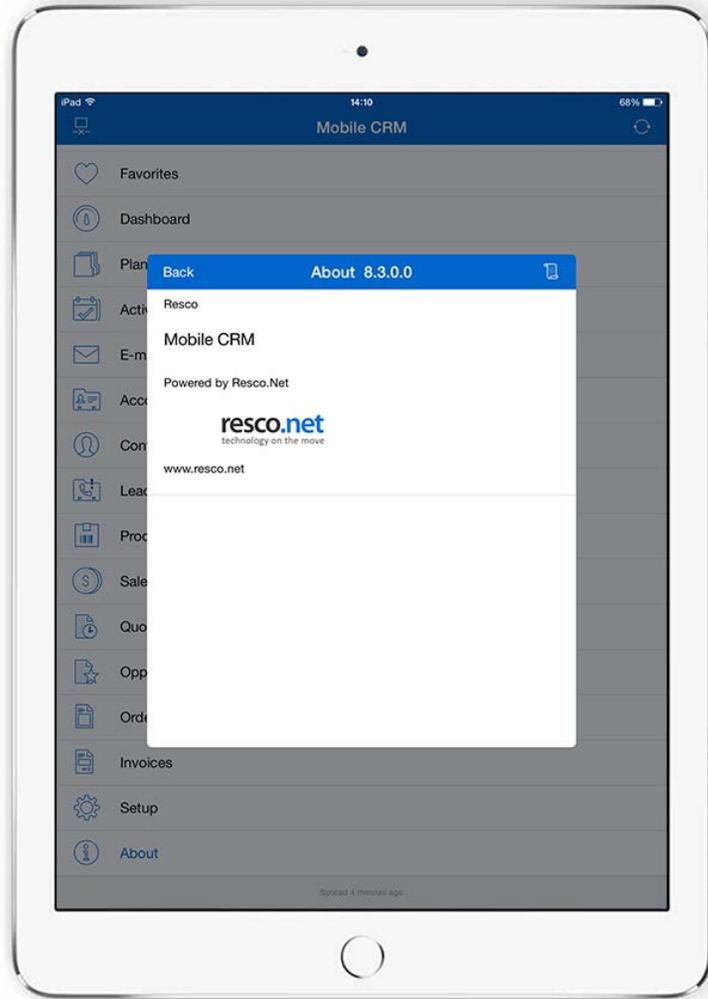
You can simply localize the whole solution to your geographical needs and status. You are able to change the language to one of the wide range of available ones, set the maximum size of attachments (in bytes) or the maximum number of synchronized records.



Setup



In the Setup section, you can vary the functions and the items displayed in the application.



Support



Resco technology supports your company's own branding, so you can place the description of your company to the About section in Resco Mobile CRM.

For the full overview and to get answers on specific questions, feel free to contact our team at any time: mobilecrm@resco.net.

6 Most Popularly Used Terms/CRM Glossary

Account

A person or a business to which the salesperson tries to sell a product or service. It can also be your partner or anyone who is a part of your business interactions.

Activity

Some kind of an action. From tasks to emails, phone calls, to appointments and service activities.

Contact

Somebody who buys the products or services or is somehow involved in a business transaction.

Dashboard

Your homepage and usually the first thing that pops up when you open CRM. It is very easy to customize, so you can have all that matters to you in one place.

Entity

Alpha and omega of your CRM software. We recognize dynamic, business, custom and system entity.

Customization

Any modification to the CRM system. You can customize entities, attributes, forms or views to change the way CRM was originally made.

Deployment

The way the CRM system is distributed or installed throughout the entire organization.

Lead

Any person or organization that a company might have the potential to do business with. Leads are usually what salespeople are after and can be converted into an account, contact or opportunity – the qualified leads or disqualified.

License

A set of CRM application functionality that an organization buys.

Notes

Information that can be appended to any record.

Opportunity

Can generate revenue or turn sale into an account.

Project

A mobile project (also a mobile application) is a customization – the way you want the Mobile CRM application look and work).

Purchase order

A document issued by a buyer to a seller that indicates types, quantities, and agreed prices for products or services the seller will provide to the buyer.

Sales order

A document that you use internally in your company. It tracks and completes a customer order for products or services.

Roles

Capture user and manager privileges in an organization.

Sharing Access

A tool that may allow a CRM user to see a record, even if the record is not assigned to them.



Get Resco Cloud