Resco Mobile CRM Guide
Customer Relationship Management Solutions

Integrations:
Microsoft Dynamics, Salesforce, Oracle CX,
& Standalone
Synchronize

Synchronize your mobile device with your back-end system such as Microsoft Dynamics 365 or Salesforce.

Tap the Sync button  and select the **User Mode**:

- **OAuth2** — if you use Salesforce or Microsoft Dynamics 365 as your back-end system
- **Standard User** — if you use Salesforce, Microsoft Dynamics CRM, including all the older on premise versions or Resco CRM as your back-end system
OAuth2

For Salesforce or Microsoft Dynamics 365 users:

• Fill in the URL of your organization’s back-end system
• Enter your password & confirm

Note: this is the App Password of your choice that you create to protect your offline data.

Then just tap the Sync button again to connect to your organization.

Salesforce users will be asked to fill in their Salesforce Username and Password within the next step to complete the registration.
Standard User

For Salesforce, Microsoft Dynamics CRM (including all the older on premise versions) or Resco CRM users:

• Fill in the URL of your organization’s back-end system
• Enter your password & confirm

Note: that this is the password you use to connect to your back-end solution.

Then just tap the Sync button again to connect to your organization.

Salesforce users will be asked to fill in their Salesforce Username and Password within the next step to complete the registration.
In Online Mode you are directly connected to your back-end system with unlimited access to real-time data.

The app can also store data in your mobile device. Via 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 in your CRM organization the next time you synchronize the app.

Watch this [video](#) to get more info about online and offline mode.
Dashboard

Dashboards gather up all insightful information in one single place. You can customize it by adding your own records and views.

Pick from leads, opportunities, events, tasks and many others. You can switch the view of each record group (leads, opportunities, etc.). Records such as, leads and opportunities can be displayed as a list or a chart.

By clicking on a chart, you can pick the chart type of your choice. Choose whether you’d like your data to be displayed in a form of a pie, column, bar, funnel, or a donut chart.

Learn what dashboards can do by watching this short video.
Map & Route Planner

The interactive map shows your Accounts, Contacts and Leads, or any custom entity/object that includes the longitude and latitude variables.

You can zoom in/out and select any record by tapping on it. When you select a record, you can view and edit the details about it. You can even let the map navigate you to your customer and plan your daily route.

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

Watch this [video](#) to get more details on filtering and searching within the map.
Call & Email

You can make a call or send an email directly from the app.

Go into a record and tap on the phone icon next to the phone number or the envelope button next to the email address.

On iOS devices, you can also swipe your finger from left to right to display buttons for making a call or writing an email.
Activities

Add an activity such as Appointments, Emails, Phone Calls, Service Activities or Tasks.

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

The calendar offers different views (Day / Week / Month or 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.

Master the calendar by watching this video.
Attach notes, photos, signatures and documents

Tap the "+" button to create a note. You can also add an attachment to it. This could be a picture, a video, a signature or any type of document (pdf file, word document, html. files...).
Accounts, Contacts & Leads

With accounts, contacts & leads you can:

• add new records, edit & delete them;
• switch to a map view to display their places;
• browse associated fields sorted in tabs (Info, Map, Contacts, Quotes, Orders,
  More: Invoices, Activities and Notes).

Qualify leads or disqualify them as Lost, Cannot Contact, No Longer Interested,
or Canceled.

We explain the switchable views [here](#).
Opportunities, Quotes, Orders & Invoices

Manage all your deals in different stages – Opportunities, Quotes, Orders and Invoices:

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

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

You can also scan product barcodes to add the products you were looking for into an order. Simply click on the barcode symbol in the top right corner.

- **Cash Management** $10 000,00
  - an unlimited number of transactions of selected types,
  - an unlimited number of electronic...

- **Leasing** $17 500,00
  - the client is not obliged to obtain external capital when lacking internal capital,...

- **Loans** $12 000,00
  - available to a wider range of businesses thanks to EU guarantees,
  - cheaper interest rate and a higher...

- **Trade Finance** $25 000,00
  - complete coverage of an export contract/project,
  - multi-source financing is possible...
Cases

You can access your cases, add activities, notes to each, or change the status of active ones to:

- Problem solved
- or Cancel Case
Searching & Filtering

You can search for records within the application by using the search bar at the top of each view.

If a record doesn’t directly start with the letters you type, but only contains them, use a percentage sign (%) in the beginning.

You are able to easily filter records to see only the selected ones. Filter records such activities or calendar according to the type, view, due date and more.
Setup

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

For instance you can change the language to one of the 16 available ones, set the maximum size of attachments (in bytes) or the maximum number of synchronized records.

You can connect your mobile organization to 3rd party solutions via Setup - including Exchange, Google, SharePoint, and DropBox.
About

If you ever encounter a technical problem with the app, you can use the Send Log option found in the About section. This sends an email to our support team, so they can inspect the issue and revert back to you.

You can also check which app version you are currently using.
Customize the app

The professional version of the solution allows you to change the app according to your needs—with 100% codeless customizations.

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

Check out how to get this easily done with the configuration tool, Woodford.
Mobile Audit

Track by whom, what, when and also where an operation has taken place. Utilize the data to find out where internal processes of an organization do not work as desired.

Analyze how much time users spend at customer sites and let the app collect data automatically, based on the admin's configuration.

Contact us to get more details on how to run mobile audit from your phone or tablet.
Device Security

The Resco Mobile App offers mobile application and mobile device management tools to secure your data natively integrated within the solution.

The data stored locally on the device (for offline functionality and faster performance of the app) is always securely encrypted by default.

Learn more about how device security works in detail here.
Resco Cloud

Offline Mobile Solution for Field Service & Sales Scenarios

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