Quick Start Guide – Mobile CRM

SuperOffice Mobile CRM

With SuperOffice Mobile CRM, you can look up contacts, book meetings, update your sales pipeline, open and read documents, check status of projects, follow up sales and manage your sales team all from your mobile device.

Mobile CRM provides real-time access to your CRM data presented in an intuitive and user-friendly app you may use on both your smart phone and your tablet.

Mobile CRM is included for all customers who use SuperOffice CRM 9 or later.

Read this guide to get started with your SuperOffice Mobile CRM app.

[Go to our app store for more information and download]

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General

Navigator
The Navigator menu is to access the main screens in Mobile CRM: **Diary**, **Company/contact, Sales**, **Project, Notifications** or **Camera.** Once you choose a main screen, the menu will slide to the left and disappear.

Screen optimization
On devices with small screens, the navigator is hidden automatically. You select this icon to display the navigator.

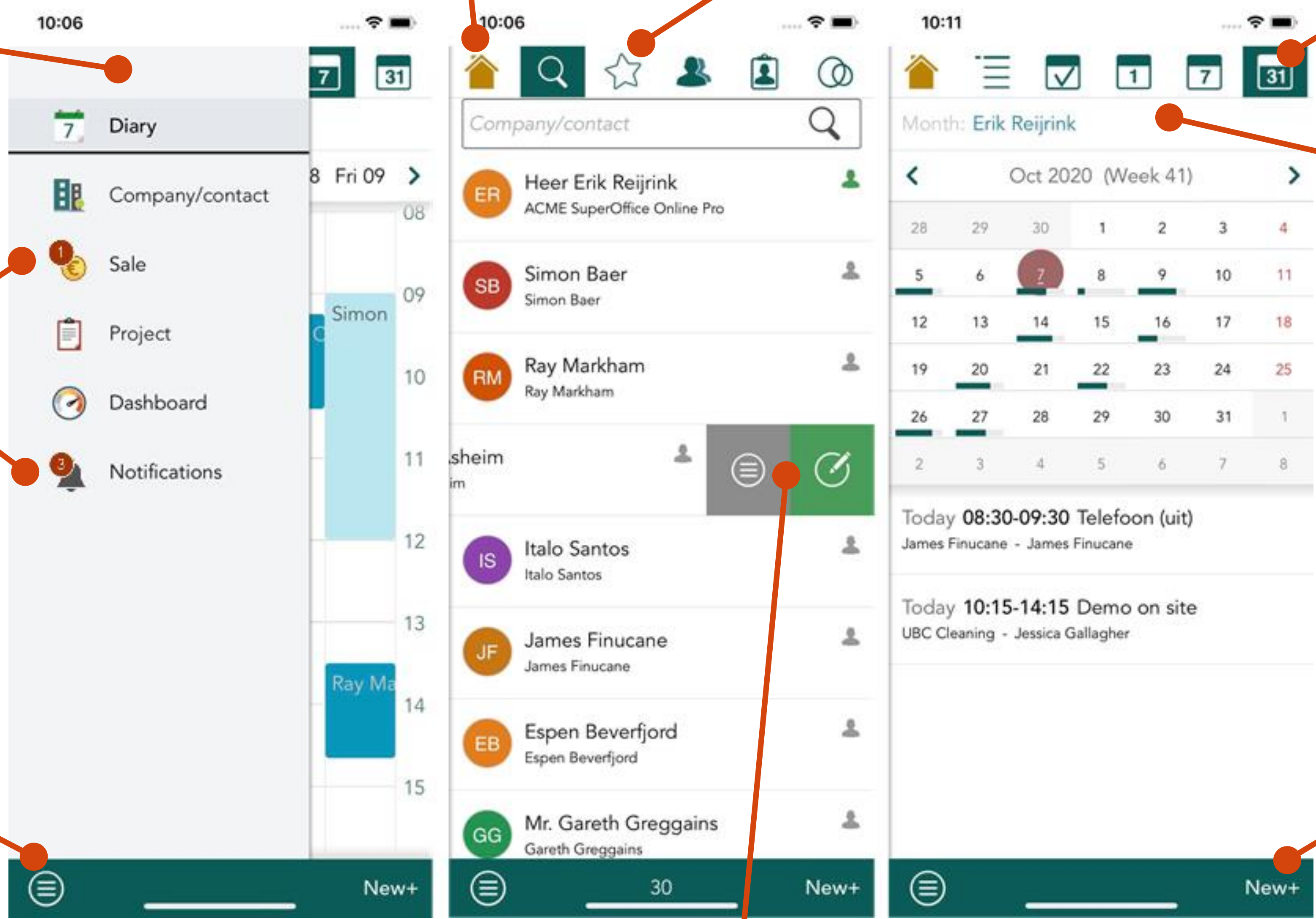
Favorites
The star tab will show you your favorite records within the screen you've selected. This way your favorite records are always easy to find.

Tabs
The main screens and associated sub-screens consist of tabs. You can see which tab is selected, because its icon will be highlighted.

Notifications
If the icon for Notifications shows a number in a red circle, it means you have pending invitations. You also get notifications about overdue sales.

Search
To view the diary of other users, tap your name and choose a user from a list. This also apply in the sales section.

Task menu
On many screens, at the bottom left, you will find the **Task** menu. This contains options that are relevant for the currently screen. These may be logging in or out, settings, filtering, sending SMS/email, map display etc.



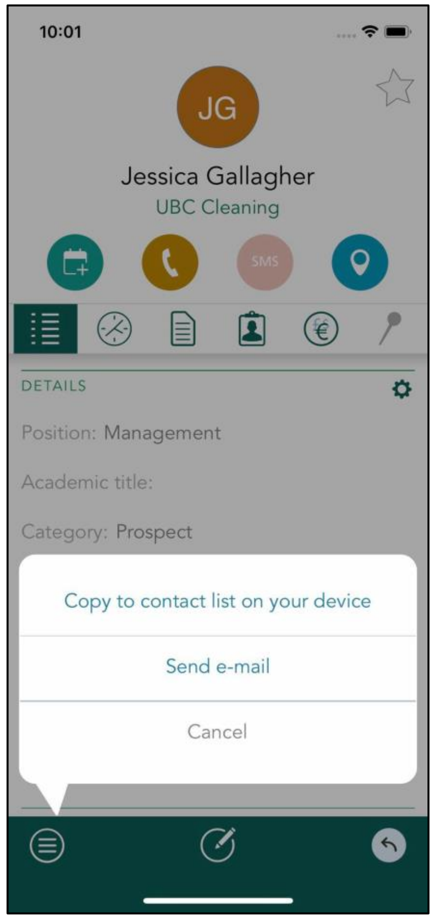
Create new
The **New** button creates a new entry in the database. What type of entry that is created depends on which screen you are in e.g. **Diary**, **Company/contact, Sales or Project**.

Swipe
Throughout the app, you can swipe for easier and faster navigation. Access the menu to edit contacts, add to favourite, send SMS, or send an e-mail. In addition the green button allows you to create a new e-mail or call the contact directly.

Copy contacts to local address book

To copy a contact from SuperOffice to the local address book on your device follow these steps:

1. Navigate to the **Contact** page
2. Open a **Contact** (either in the history list or search for any)
3. Select **Task** > **Copy to contact list on your device**

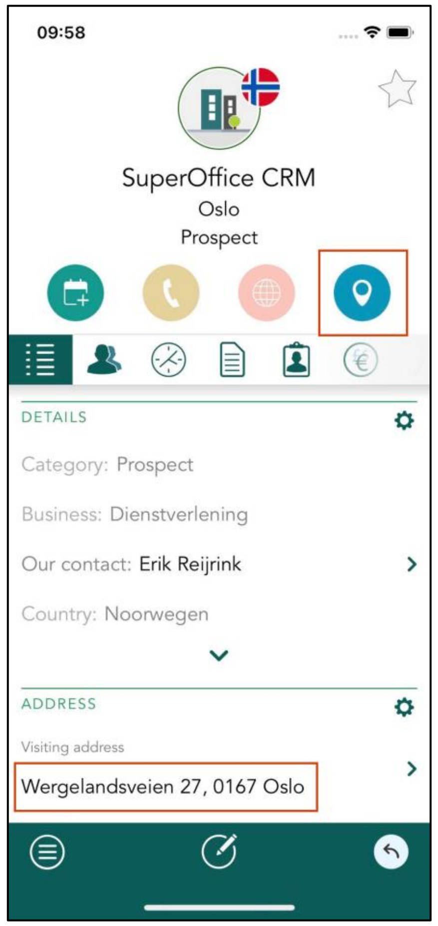


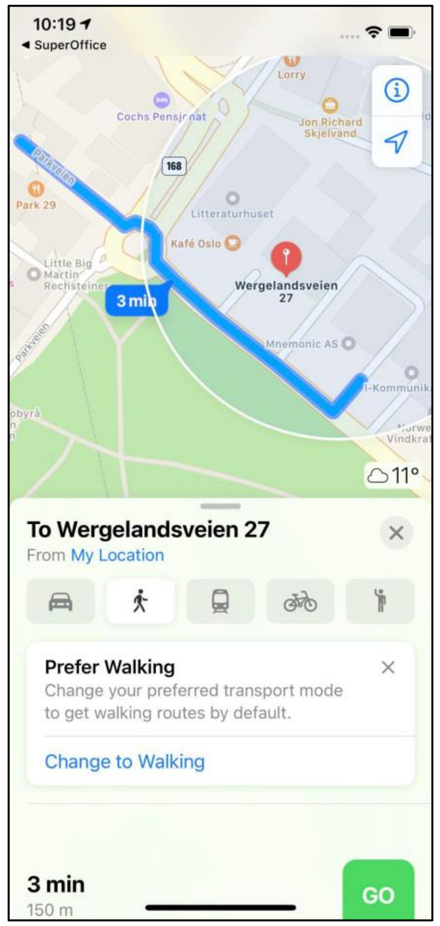
The contact will be added to the local address book in the account specified under Phone contact accounts

Show address in map

To view any address on either a Company or Contact in Mobile CRM follow these steps:

1. Navigate to the **Company/contact** page
2. Open a **Company** or **Contact** (either in the history list or search for any)
3. Tap on the **Location icon** in the menu bar, or tap on the field **Street Address**
4. If the field contains an address, Google maps will open on your





Mobile CRM will open the default map service on the your device and show the address of the selected **Company** or **Contact**.

***Note**: The Map URL can be changed under **system settings** and may vary depending on the device.*

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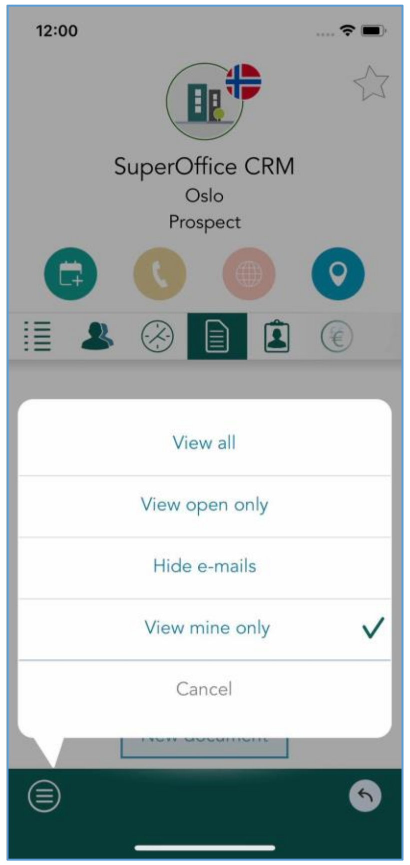
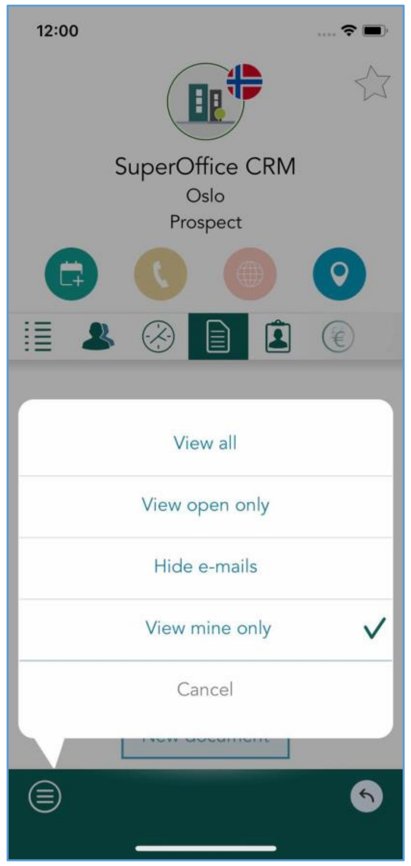
Adjust the filter settings

When a company has a lot of activities registered, it can take time to look up a specific document or activity. By using filters, you narrow down the lists of documents and activities.

1. Navigate to the **Company** or **Contact** section
2. Select a Company or a Contact (search or from history list)
3. Click on the **documents tab**
4. Choose **View all, View open only, Hide e-mails, or View mine only**



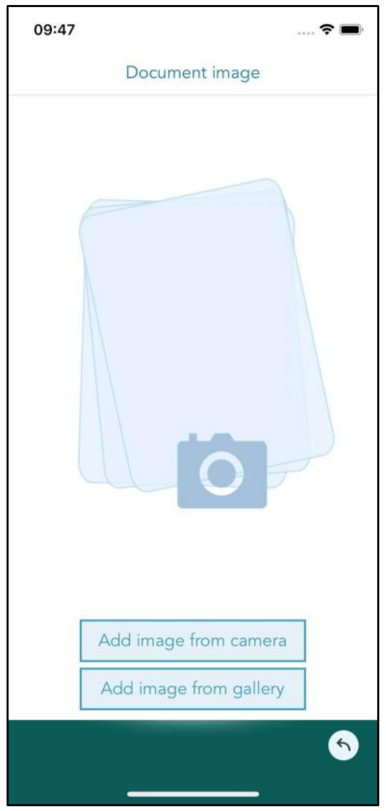


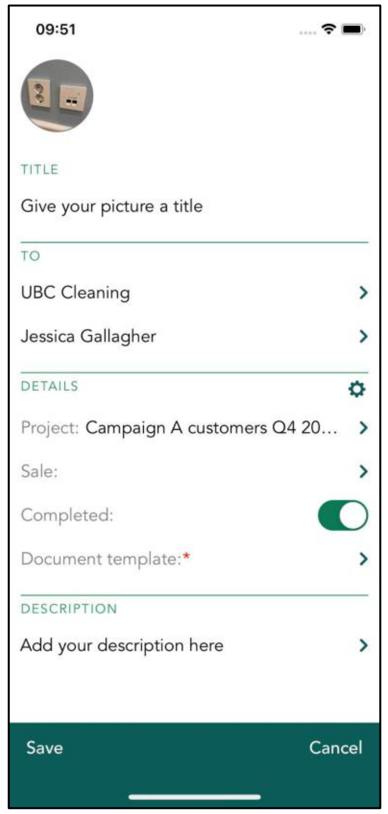
Using one of these filters reduces the number of activities making it easier to find what you are looking for.

Archive an image

Pictures are more and more used as documentation. Here's how you can save images directly from you phone in SuperOffice CRM using Mobile CRM:

1. Navigate to a relevant **Company/contact, Sale, or Project** and open the **documents** tab
2. Select **New document**
3. Now you can choose to either take a picture using your camera, or you can choose a picture that is saved on your phone.
4. Tap and drag to select a region, or select OK to use the entire image
5. Add a title for the image, connect the image to the relevant sale and/or project and add a description. Once you added all the relevant details, click Save.





The image will be visible for all user momentarily on the corresponding company, contact, and project card.

Setting up an email account

To use and be able to send an email(s) within Mobile CRM, an email account needs to be configured.

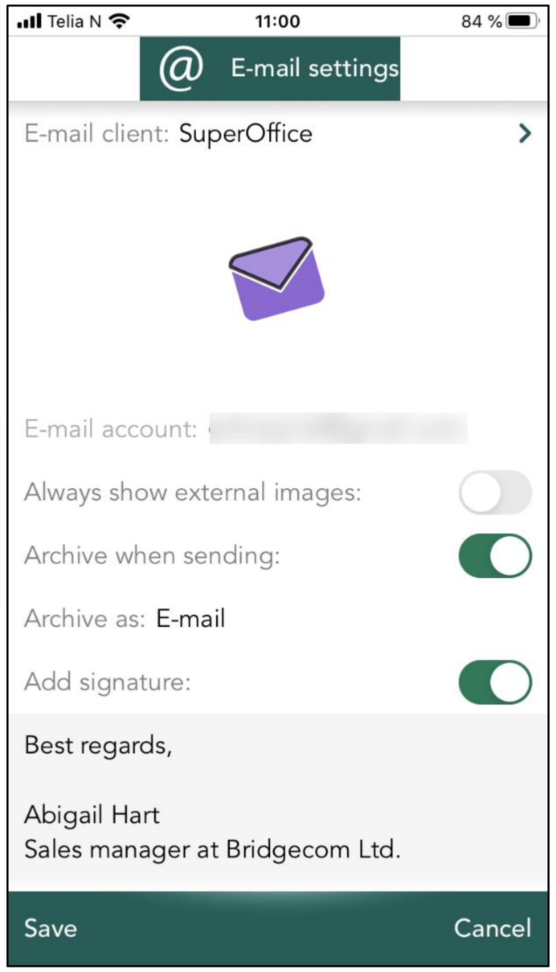
Go to the **Personal settings** menu in SuperOffice and choose **Mobile CRM settings**. In the Mobile CRM settings, press Send. Open the e-mail you receive on your mobile or tablet and click on the link in the e-mail. Next follow the instructions on your screen.

Once you are logged into the app again, click on the **Task** button, go to **Settings**, and then choose **Email settings.**

E-mail client
Here you choose which email client you wish to use. SuperOffice will setup the default you've chosen in the web version of SuperOffice CRM

Archive when sending
Check this if you want all e-mails to be archived automatically.

Add signature
Check this if you want your signature to be added automatically. Select the signature line to edit your signature.



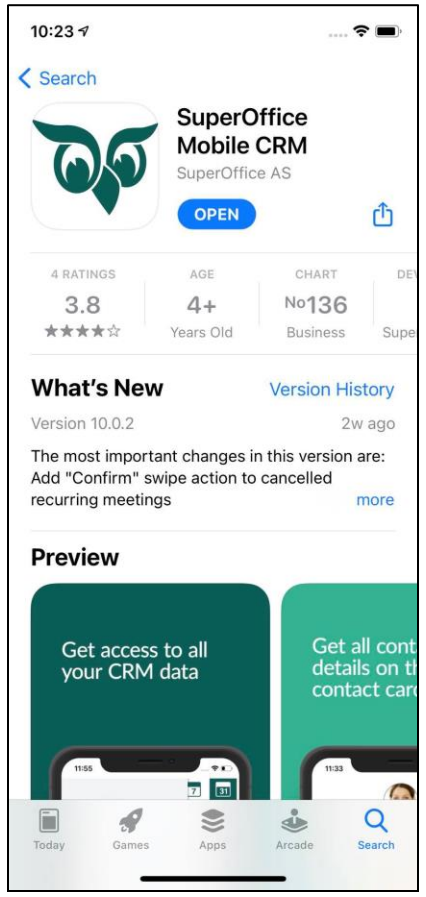
Always show external images
Check this option if you wish to see (and download) images when you open and read an e-mail.

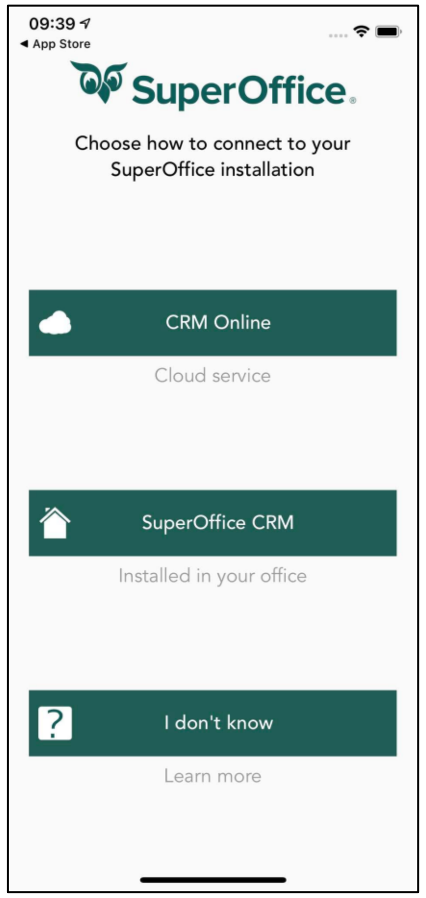
Archive as
Specify which document type sent e-mail messages will be archived as in SuperOffice.

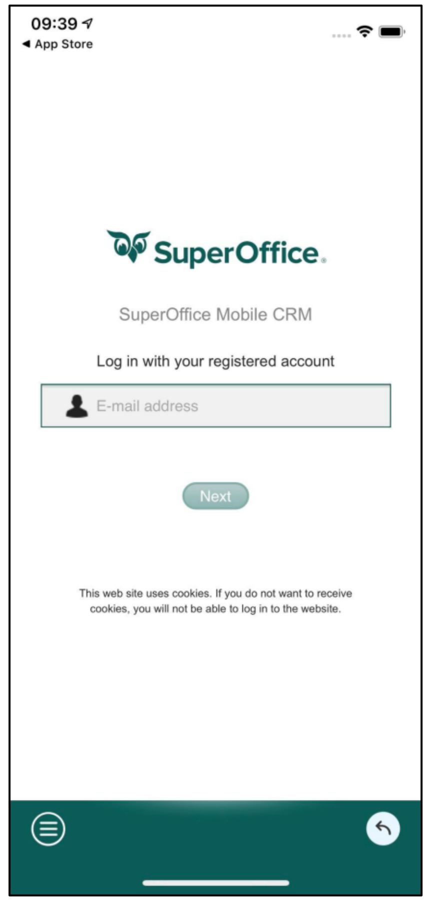
First time use/login

To download the Mobile CRM app follow these steps:.

1. Access **Apple AppStore** or **Google Play** depending on your device
2. Download and install the SuperOffice Mobile CRM app
3. Start the SuperOffice Mobile CRM app
4. Choose the connection for your SuperOffice installation
   If you choose to connect to a local installation, enter the **SuperOffice server URL** for your company. (Ask your IT-department)
5. Login using your username & password







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How to work with Mobile CRM

There are a lot of new features & function Mobile CRM, use the following table to get to know the most important ones.

I would like to..	Where?	How?
Send an **email**/ **SMS**	You can send an SMS or an email to one or more persons from the following places in Mobile CRM: • The **Projects** and **Selection** tab on the main Contacts page. • The **Group tab** on the main Contacts page • The **Task menu** in the Details tab of a person. • The **Task menu** in the Participants tab of an appointment. • The **Action Button** for e-mail at the top of your screen.	Click on the email address on a **Company** or **Contact** to send an email or on a **Contact's** mobile number to send an SMS**.** Write your message in the message field. Select **Send**.
Open and read **documents** and **email**	You hav access to all documents and email stored in the database from Mobile CRM. Each main page has it own document tab.	Navigate to a **Company** or **Contact**, a **Sale** or a **Project**. Browse to the **documents** tab and select the document you required. This will take you to the document dialog where you can *open* the document or *send* it as email. If the document type is email you can **forward** ,**reply all** or **reply** to the recipients of the email.
Search	In all main pages, you can search for information stored in your SuperOffice**.**	Go to the main page for **Contacts**, and select the **Search** tab to search for Companies/Contacts. To search for Projects, go to the main page for **Projects** and select **Search**. In appointments and sales; select your name, and then search by name.
Add **participants** and **resources** to appointments	In the **Diary** you can create and modify appointments and invite colleagues and add resources to that particular appointment.	Navigate to the **Diary** and click on an appointment (where you are the owner). Go to the **Participant** tab > Click on **Add participant**. Search for the contact you are looking for and select him/her. The person is added to the appointment. To add a resource go to the **Participant** tab, click on **Task** > **Add resource**
View my **sales** forecast and pipeline	From **Sales,** you can update forecasts for future sales, conclude sales and create new ones. Also, track the status of all sales that you and your colleagues are responsible for.	Navigate to **Sales**. Select the **Upcoming, Closed, Overdue** or **Status** screen. In the **Upcoming** tab, you see a list of sales with the date of today or ahead. The **Status** tab shows a column chart of your pipeline. Change period by selecting **Task** > **View Quarter/Month/Week**