Crm Customer Relationship Management

CRM Client User Manual

Version 2.6

Aurea
Unlimited Possibility

Notices

Table of Contents

Preface

For details, see the following topics:

- About this documentation
- Notation conventions
- Aurea global support

About this documentation

This guide is part of the documentation set for Aurea CRM.

Notation conventions

This document uses the following notation conventions:

Convention	Meaning
`Fixed-width`	`Fixed-width` font indicates code, path names, file names, environment variable names, parameter names, command names, machine names, URLs.
`Bold Fixed-width`	**`Bold Fixed-width`** font is used to indicate user input or to emphasize certain lines of code.
Italic Fixed-width	*Italic Fixed-width* font indicates a placeholder for which you must supply a value.
Bold Sans serif	**Bold sans serif** typeface indicates the names of graphic user interface elements such as dialog boxes, buttons, and fields.
Italic serif	In text, *italic serif* typeface indicates the first use of an important term. The term is defined in the glossary.
Underlined	Underlined text in command lines and parameter descriptions indicate that you only have to enter the underlined part of the command or parameter name. For example, if you use the `-LOGFILE` parameter in a command, you only need to enter `-LOGF`.
[ ]	Brackets enclose optional arguments.
{ *a* | *b* | *c* }	Braces enclose two or more items. You can specify only one of the enclosed items. Vertical bars represent OR separators. For example, you can specify a or b or c.

Convention	Meaning
...	Three consecutive periods indicate that you can repeat the immediately previous item. In code examples, they can be horizontal or vertical to indicate omissions.
Menu > Choice	An angle bracket between two menu items indicates that you should choose an item from a menu. For example, the notation **File** > > **Exit** means: "Open the **File** menu and choose **Exit**."
>>	Links to related information in other chapters or documents are indicated using the **>>** symbol.

Aurea global support

If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please open a ticket on Aurea Support Central. Preferably, search the articles on the Aurea Knowledge Base for solutions to your issues before opening a ticket.

Information about the support organization is available on Support Central. The product documentation is available athttps://help.aurea.com/crm/#.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, contact us through our website.

1

Introduction

CRM.Client application allows you to access, display and edit data stored in Aurea CRM on your tablet PC or Desktop running on Windows 10 or iOS operating systems.

You can use CRM.Client along with Aurea CRM Web. The CRM.Client app works independently of the CRM Web version but both of them work with the same database. Your administrator has to define the configuration, so that your CRM Web and CRM.Client work with the same database.

This document describes the elements in the user interface and the most important functions such as searching and editing data, including calendar and appointment data.

Your administrator can configure CRM.Client functionality and user interface to meet your individual requirements. The functions and user interface in this document may therefore differ from those in your installation. Contact your system administrator for custom modifications that differ from those described in this documentation.

2

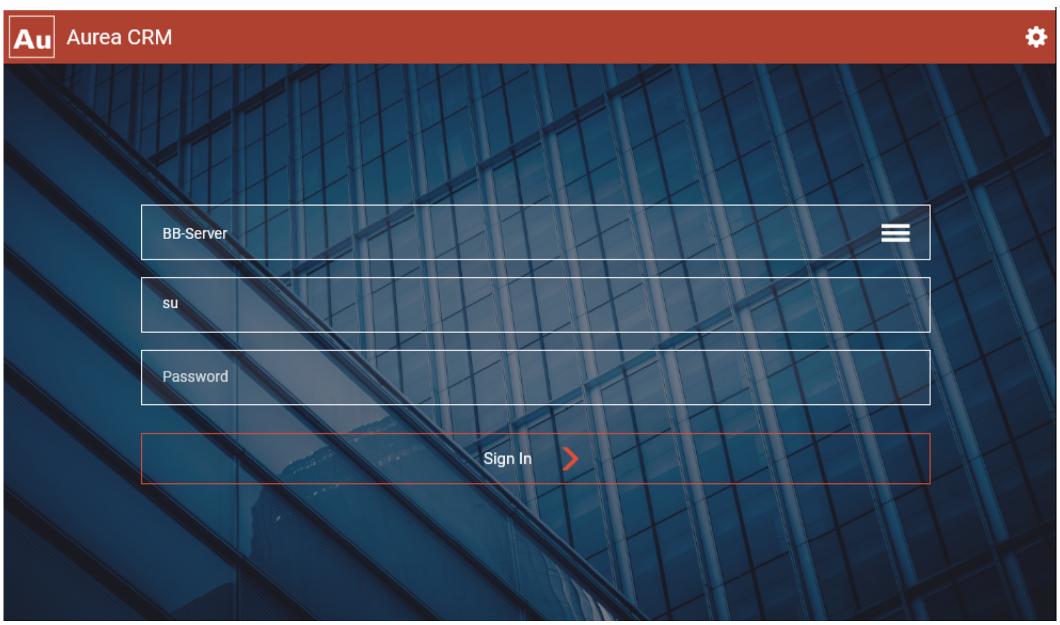
Logging on

You can download and install the CRM.Client app from the Apple iStore or the Microsoft store.

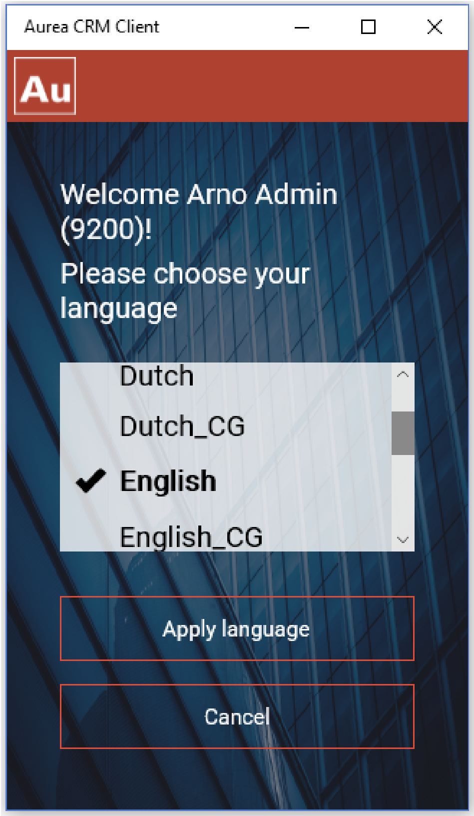
To log on to CRM.Client:

1. Start the CRM.Client app.

   The CRM.Client login screen displays.



2. If you can log on to more than one server, click on  and select the desired server.
3. Enter your user name and password.
4. If you are logging on for the first time, then you have to select the language for the CRM.Client application and click Apply Language. See the screenshot below:



Note: You cannot login with out selecting and applying a language. During this step the required data model and UI details are loaded onto the device.

5. Click on  (**Sign In**) to login.

   Data, queries, settings, and more are synchronized with the main Aurea CRM database.

   Note: If you log on for the first time, this may take a while depending on the transferred data volume.

   The **Dashboard** displays.

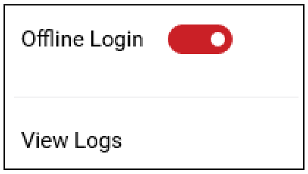
Note: Your administrator can define a time span after which you have to log on anew. This can occur if you work with other applications and CRM.Client is not on the screen or your device switches off automatically.

Logging on in Offline Mode

You can log on to CRM.Client in offline mode, e. g. when no network connection is available.

To log on in offline mode:

1. Click  in the login screen.
2. Switch **Offline Login** to ON. See the screenshot below:



3. Log in to the application.

Viewing the Log File

In case problems occur during login, you can view the log file and send it to your Administrator.

To view the log file:

1. Click  in the login screen.
2. Click on **View Logs**.

   The **View Logs** window is displayed.
3. Click on **Send Log File** to open your e-mail client. The log file is already enclosed as `log.txt` file. Enter the recipient's e-mail address and send the e-mail.
4. Click , to go back to the login window.

Logging off and Closing CRM.Client

To log out:

1. Click  to display the Control Center.
2. Click  (**Log out**).

   or

   Click  to logout and close the CRM.Client application.

Logging on in Offline Mode

You can log on to CRM.Client in offline mode, e. g. when no network connection is available.

To log on in offline mode:

1. Tap in the login screen.
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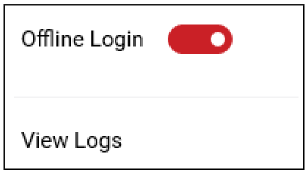

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   Tap to logout and close the CRM.Client application.

3

User Interface

Learn about the exciting features of CRM Client user interface.

Responsive behaviour of CRM.Client Application

CRM.Client application user interface is designed to provide an optimal user experience for different screen sizes, layouts, and resolutions.

When you change the screen size, CRM.Client responds appropriately by resizing the different screens and panels dynamically to provide an optimal experience using the application.

The following topics describe the dynamic responses rendered by the application for different screen resolutions.

Screen Resolution and Orientation

Windows 10 Desktop and Mobile devices

The following screen resolution configurations apply for different device types:

- On Windows Mobiles and Tablets, CRM.Client application requires a minimum screen resolution of 320 x 500 pixels. If either of the resolutions, width or height is less than the minimum value provided the CRM.Client application does not start.
- On Windows Desktop, when the width or height of the screen is greater than the minimum prescribed then the screen size is adjustable till the minimum values are reached.

Apple iOS Devices

The following screen resolution configurations apply for different device types:

- Apple devices running iOS versions greater than 9 are supported.
- iPhone 5 is the minimum supported mobile device.

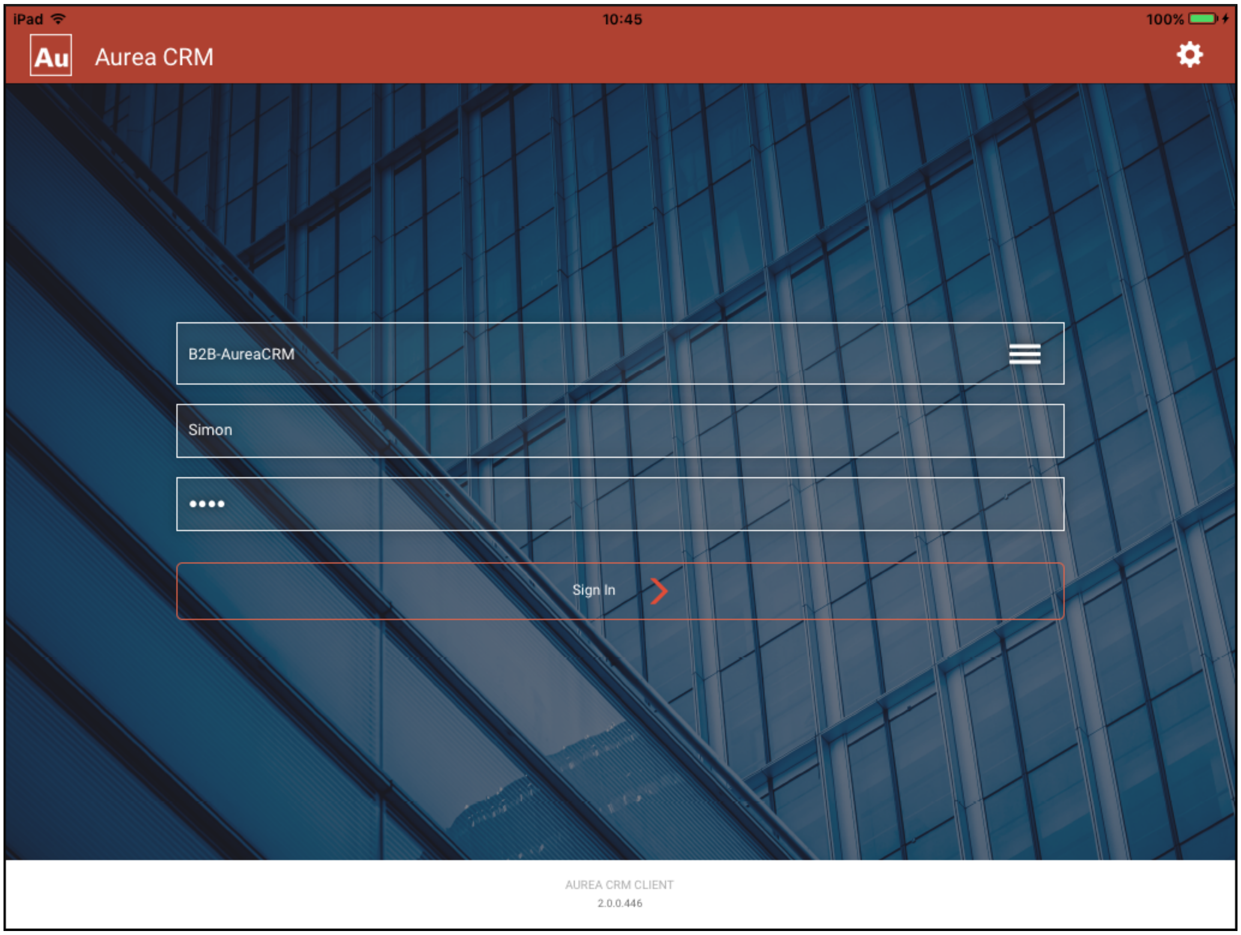
Note:

- iPhone X is not supported.
- iPhone only supports Portrait mode.

- iPad supports both portrait and landscape mode with a minimum screen resolution of 768 x 1024 points. Example devices: iPadMini and iPad Air 2.

Responsive Login Screen

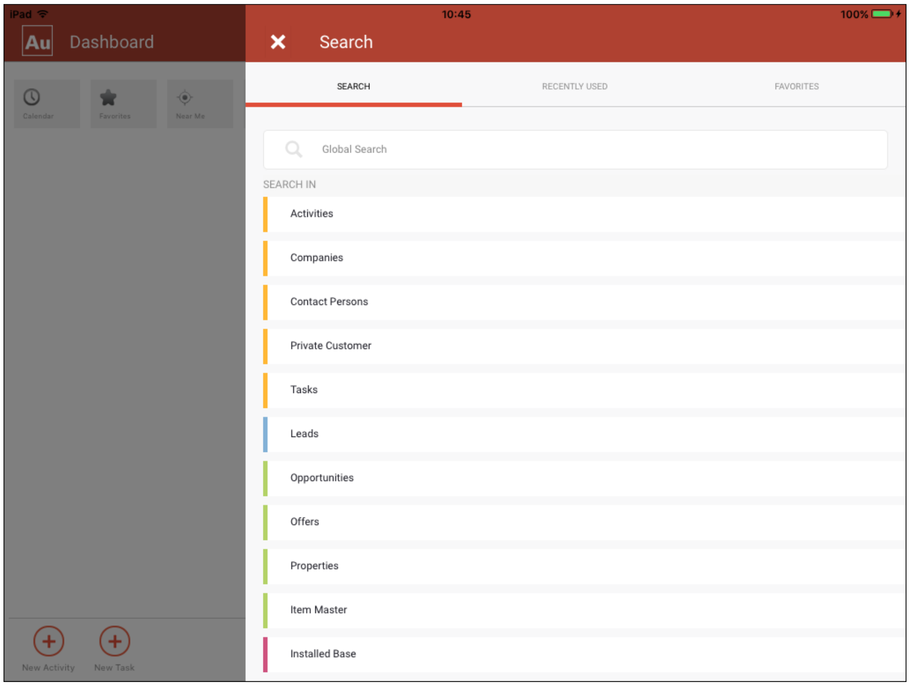
The login screen for large resolutions with a maximum width of 750 pixels is shows below:



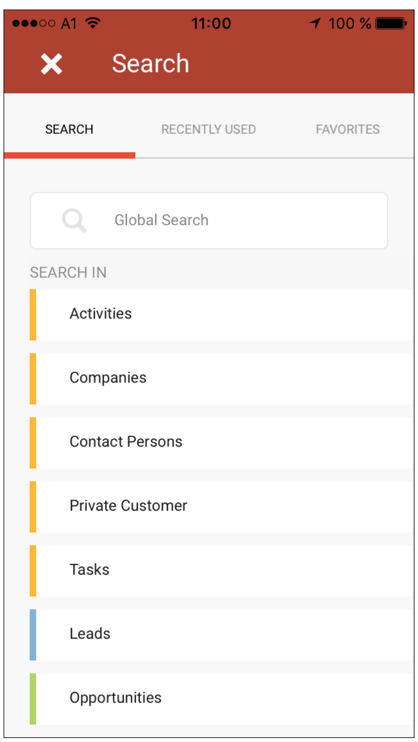
The following screenshot shows the login screen for smaller resolutions:

Responsive Search Bar

For larger screen resolutions the Search panel overlays the underlying window up to a maximum width of 750 pixels after which part of the underlying panel is visible:

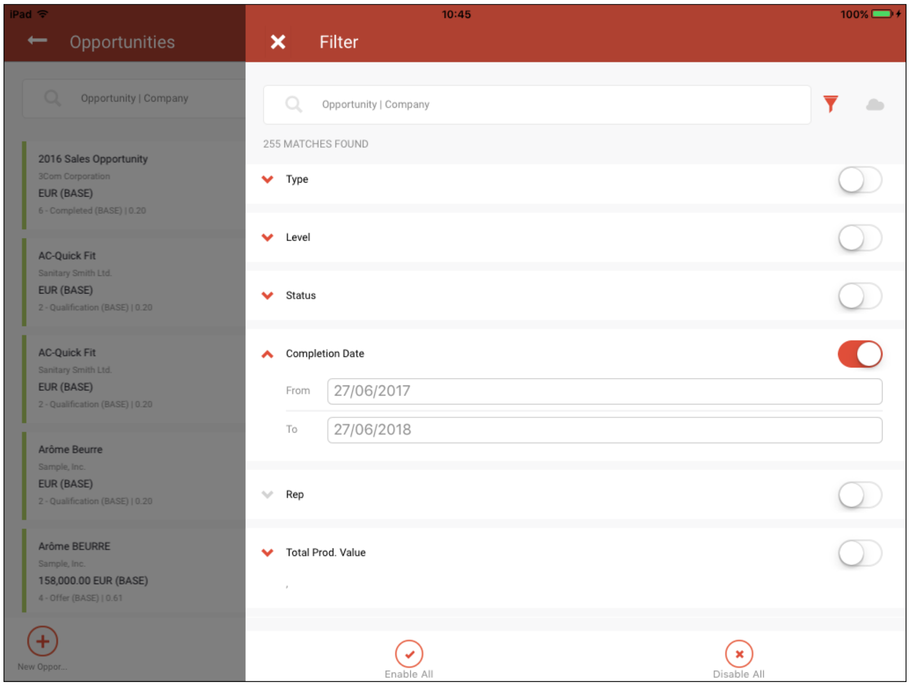


For smaller screen resolutions the Search panel overlays the underlying window, see the screenshot below:

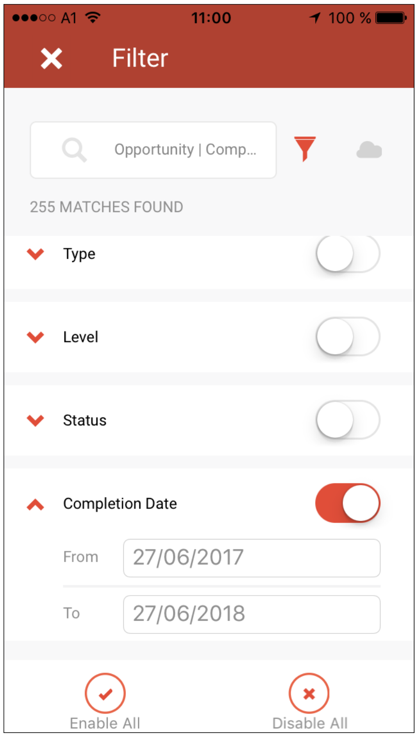


Responsive Filters

For larger screen resolutions the Filter panel overlays the underlying window up to a maximum width of 750 pixels after which part of the underlying panel is visible:

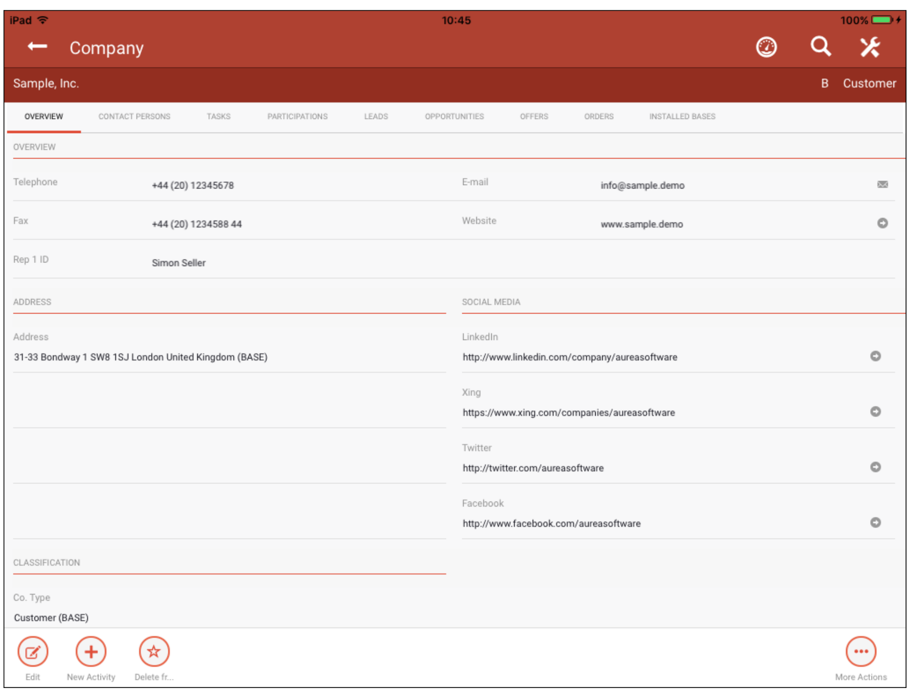


For smaller screen resolutions the Search panel overlays the underlying window, see the screenshot below:

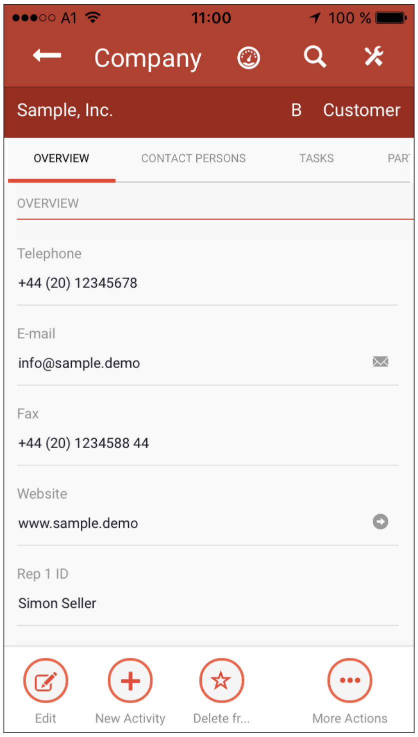


Responsive Details View

For larger screen resolutions the Details View shows the fields in two columns:



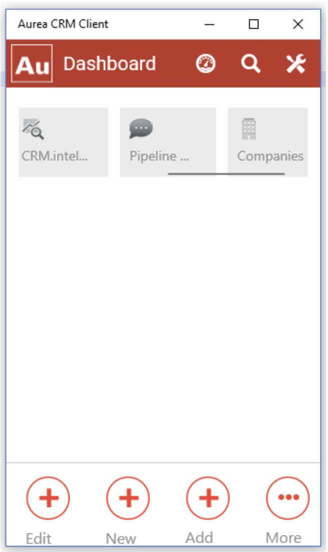
For smaller screen resolutions the Details view shows the fields in a single column:



Start Page

After starting the app the start page is displayed.

Your administrator defines which data is displayed in the start page. The following example shows the default start page of the ISI industry solution:



The start page displays all recordlist view item in the single tile that is supported in the Insight Board.

You can always return to the start page by clicking on .

Note:

- Your administrator can define which data is displayed on your start page.
- Only tile supported is the Insight Board item configured with the record list view to display the info areas supported.

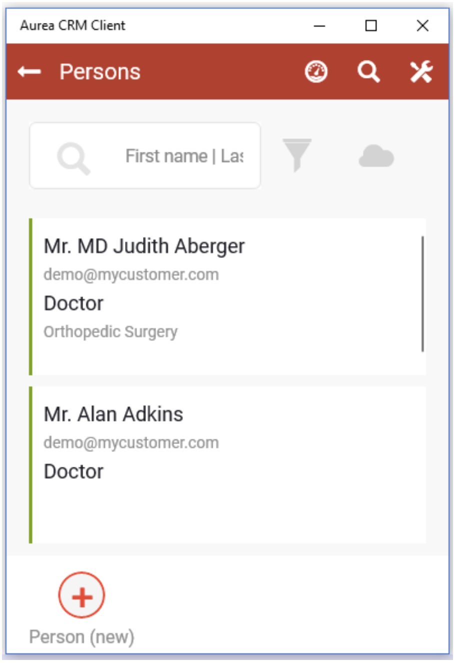
Landscape/Portrait Mode

You can view CRM.Client in portrait or landscape mode.

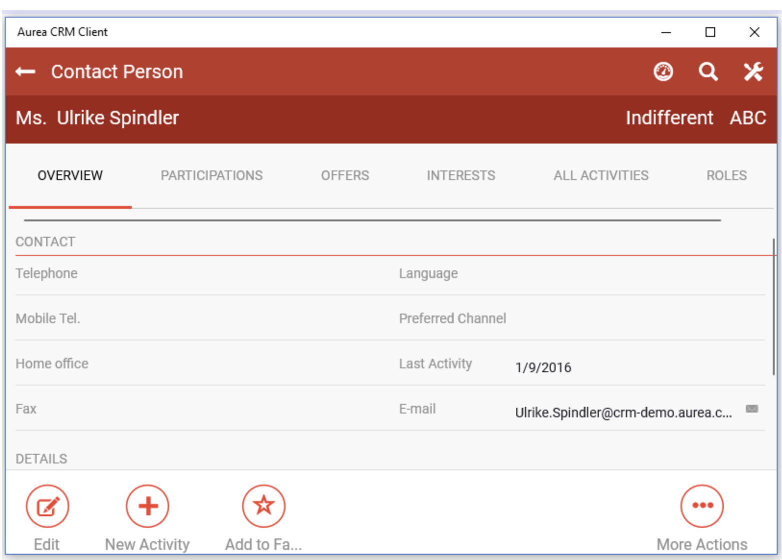
Data is always displayed in a single column for landscape and portrait mode. For Details view of a record, data is displayed in two columns for the landscape mode and empty fields are also displayed. While in the portrait mode empty fields are not displayed.

For more information on when the portrait and landscape modes are displayed, see the *Screen Resolution and Orientation* section in Responsive behaviour of CRM.Client Application on page 12.

- Portrait mode:

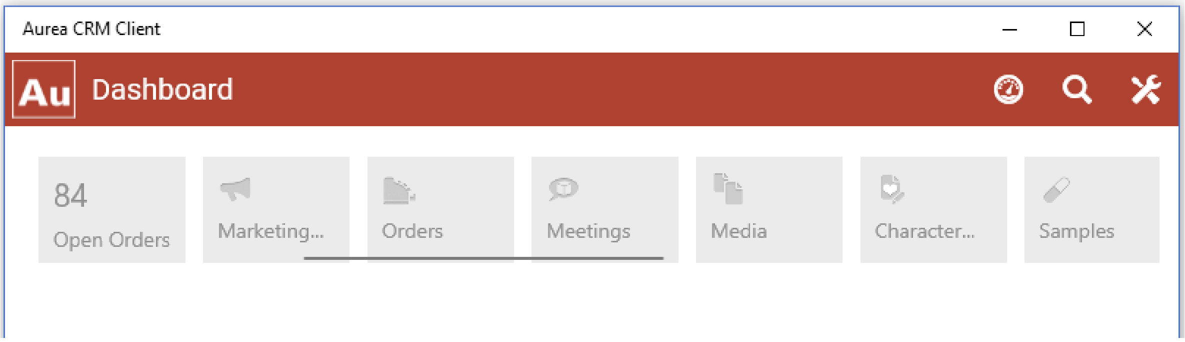


- Landscape mode:



Navigation

Use the navigation bar in the top right corner to switch between the main areas.



The following options are available throughout the application:

(**Start Page**): Switches to the start page.

(**Search**): Displays the Search options.

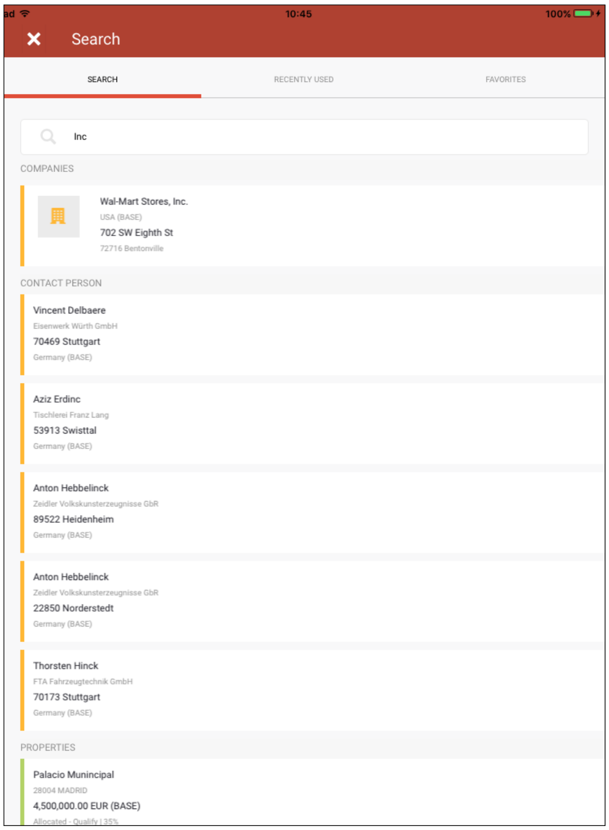
(**Control Center**): Opens the Control Center.

The Search and the Control Center pages have a button on the top left to close the page. All the other pages have the button to go back to the previous page in the navigation.

Clicking on the Start Page () button from any view results in a navigation reset and all prior navigations are removed from the navigation stack.

Lists

When searching, search results are displayed in a list screen.



You can:

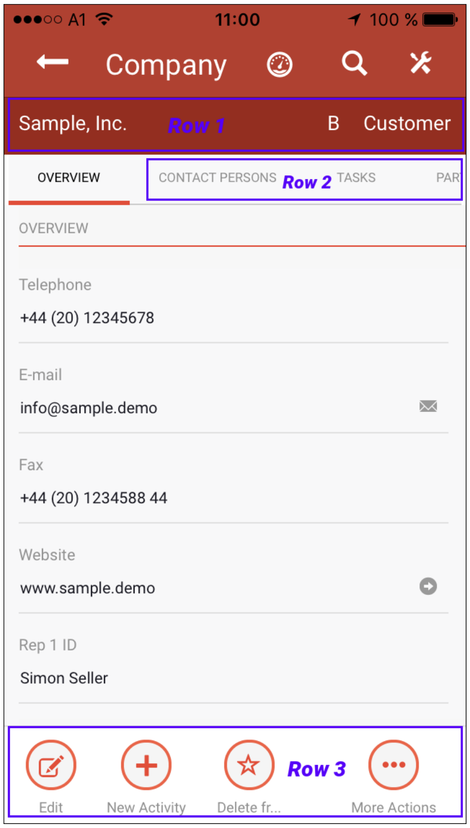
- Click on a record to open and view its details.
- Swipe Up/Down to scroll through the list of records.

Headers

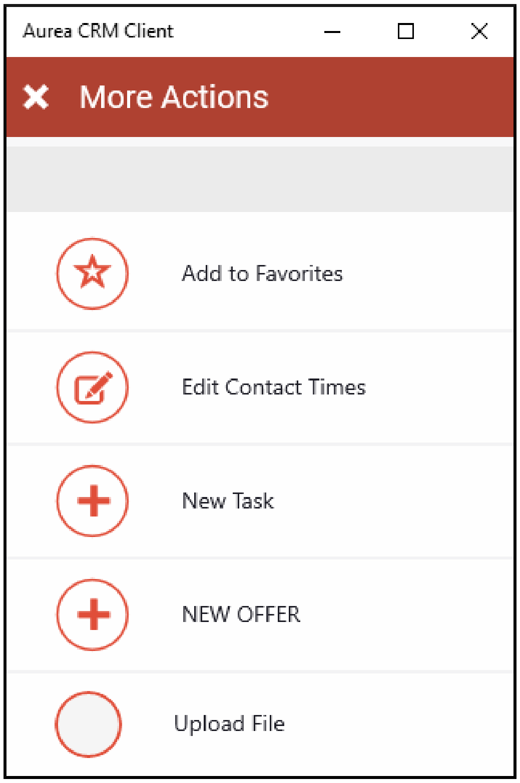
Each page in CRM.Client contains a single header that can contain up to three rows

Header displays the following:

- ***Row 1*** displays the mini header which is a collapsed header.
- ***Row 2*** displays the Info area tabs.
- ***Row 3*** displays the Quick action buttons and **More Actions** menu.



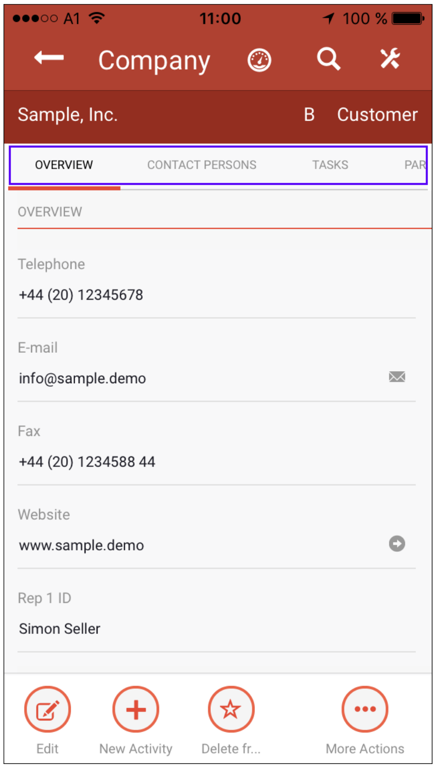
Row 3 can display three action buttons. If more buttons are configured then they are displayed in the **More Actions** pop up menu as shown in the screenshot below.



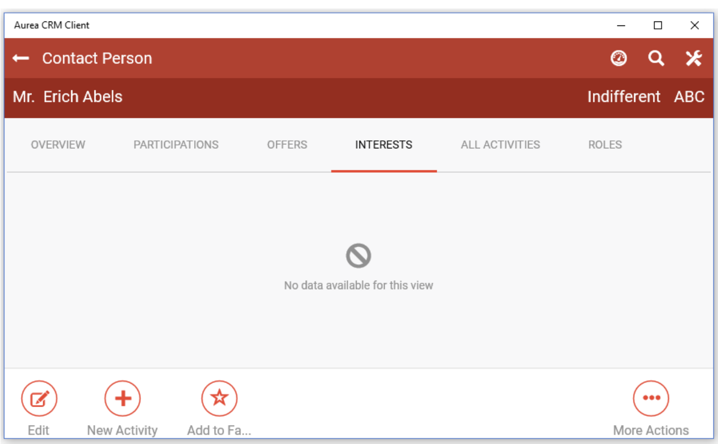
Tabs

When displaying a record's details, tabs are displayed between the button bar and the information panels.

The following screenshot shows the tabs for a Contact Person record.



Use the scroll button to view all the available info areas. Click on a tab to display its content. If a Tab is not supported then that tab page will be empty. The following screenshot shows all the tabs available for the contact person and the selected tab Interest is not supported and is thus empty.



Tabs can contain:

- Predefined filters
- Parent data

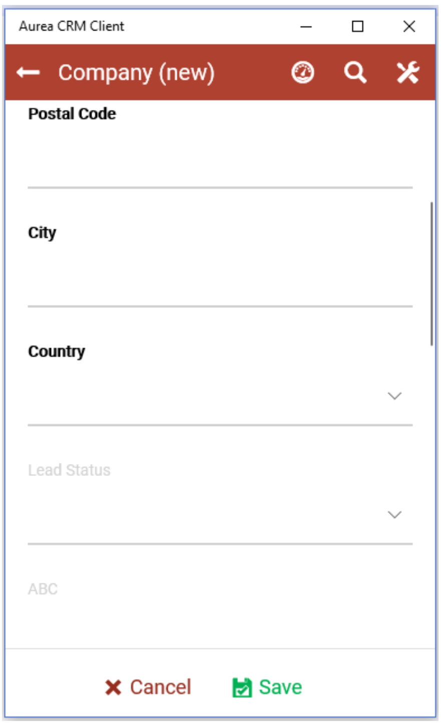
- Child info areas
- Related Data

Note: Your administrator defines which tabs are available.

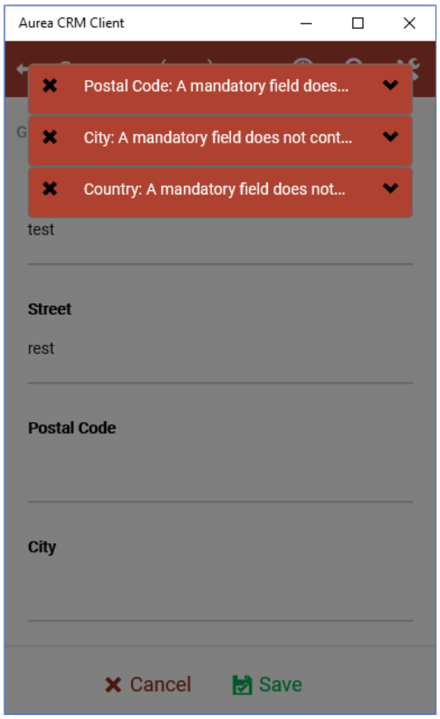
Mandatory Fields

Your administrator can determine that you need to enter data in certain fields (mandatory fields) before you can save a record.

Mandatory fields are indicated with bold formatting as shown in the screenshot below:



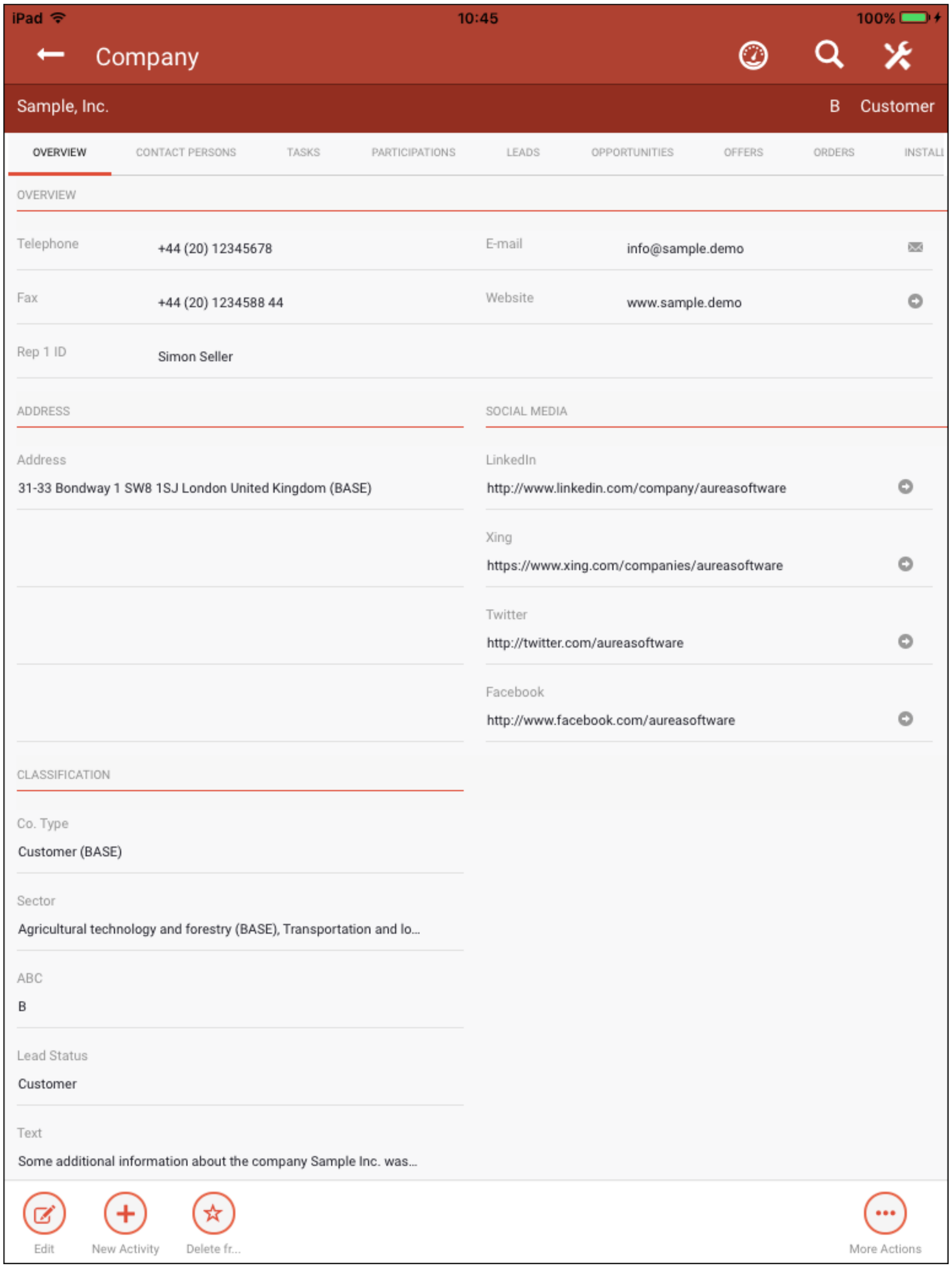
If you try to save the record without filling up all the mandatory fields then CRM.Client throws an error message:



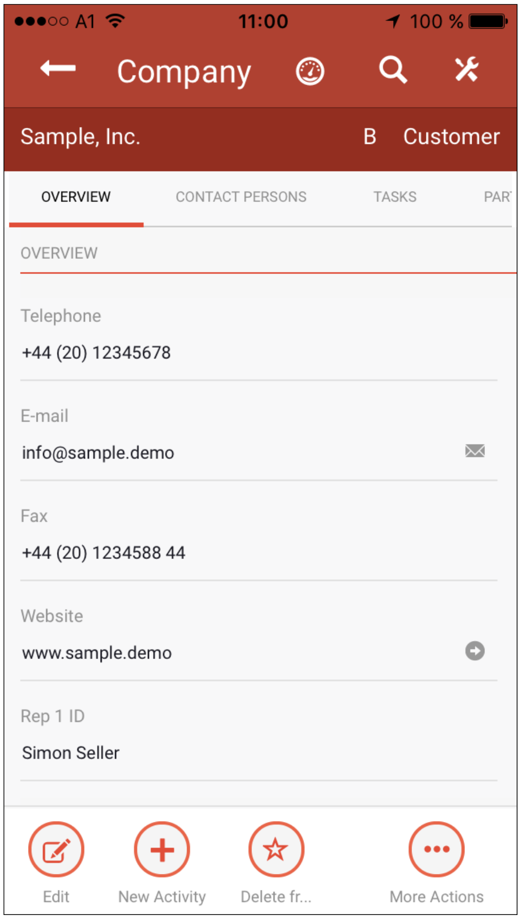
Grid View

The display view renders the data fields in a grid view at higher resolutions.

In the grid view data is displayed in two columns and empty data fields are also displayed. See the screenshot below:


iPad
10:45
100%
Company
Sample, Inc.
B Customer
OVERVIEW
CONTACT PERSONS
TASKS
PARTICIPATIONS
LEADS
OPPORTUNITIES
OFFERS
ORDERS
INSTALL
OVERVIEW
Telephone
+44 (20) 12345678
E-mail
info@sample.demo
Fax
+44 (20) 1234588 44
Website
www.sample.demo
Rep 1 ID
Simon Seller
ADDRESS
Address
31-33 Bondway 1 SW8 1SJ London United Kingdom (BASE)
SOCIAL MEDIA
LinkedIn
http://www.linkedin.com/company/aureasoftware
Xing
https://www.xing.com/companies/aureasoftware
Twitter
http://twitter.com/aureasoftware
Facebook
http://www.facebook.com/aureasoftware
CLASSIFICATION
Co. Type
Customer (BASE)
Sector
Agricultural technology and forestry (BASE), Transportation and lo...
ABC
B
Lead Status
Customer
Text
Some additional information about the company Sample Inc. was...
Edit
New Activity
Delete fr...
More Actions

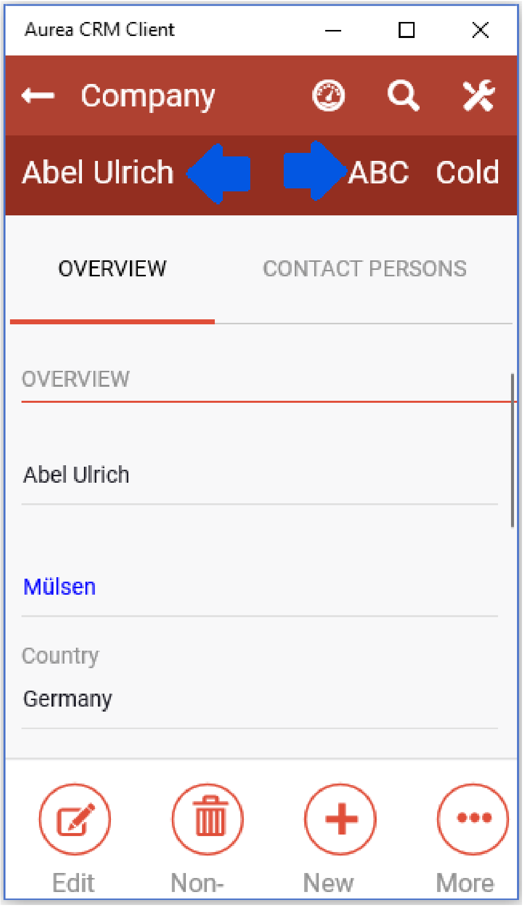
If the screen width is less than 720 pixels then the fields are not displayed in the grid view, but are displayed in a single column. See below:



Swiping from One Record to Another

Your administrator can define that you can swipe (in the header of an info area) from one record to the next one.

If this function is enabled, you can drag the second row of the header to the right (next) or to the left (previous):


Aurea CRM Client
Company
Abel Ulrich
ABC
Cold
OVERVIEW
CONTACT PERSONS
OVERVIEW
Abel Ulrich
Mülsen
Country
Germany
Edit
Non-
New
More

4

Basic Functions

Learn about the basic functions for using CRM Client.

Search

The data you access on your device is generally restricted to only the data you require for your daily work.

If you require data that is not included in your local dataset, you can search for it online in the main CRM database. Records only available in the main database are marked with a cloud symbol in the result list.

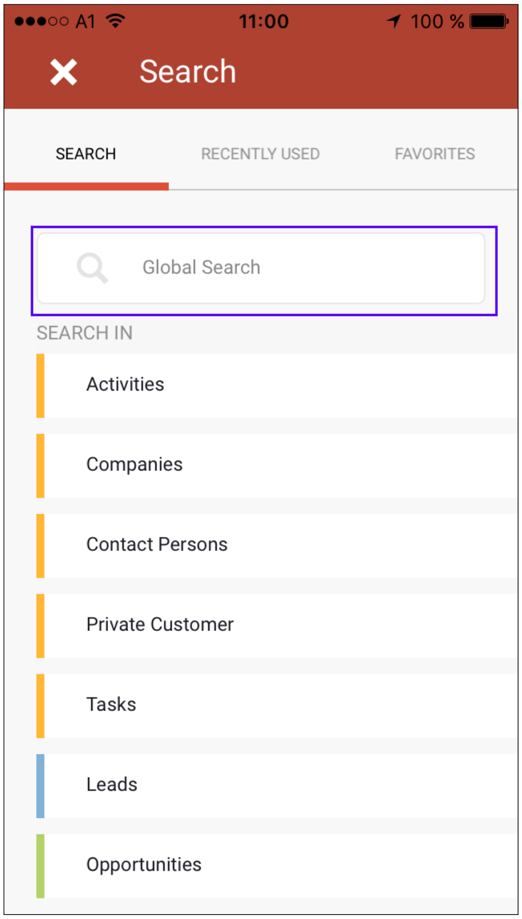
Note: Which data is transferred to (and stored on) your device is defined by your administrator. Only this data is available without a network connection.

Global Search

To search for data globally:

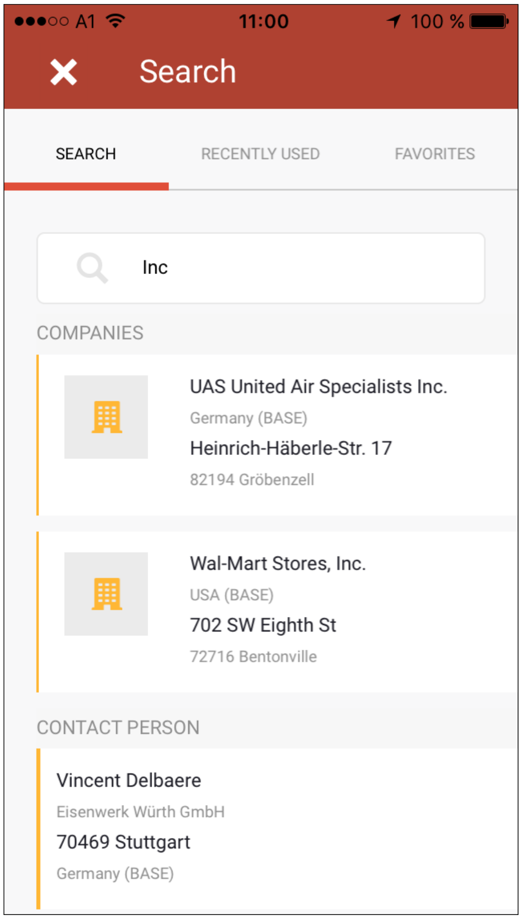
1. Click on .

   The **Global Search** text box displays on top with the list of available areas to search in. The infoareas are highlighted by colored vertical bars on the left.



To close the screen and return to the previous page, click the X button.

2. Enter your search criteria. The List screen displays the search results. Data is searched as you type in the text box and the hits are displayed sorted by the info areas.



Note: The content displayed in the listed records are configured by your CRM.Client administrator. For example, for a Company records could include the info area logo, company name, address etc.

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3. Swipe Up/Down to scroll the records in the search results list.
4. Click on an entry in the results list to switch to the record's details view.

Search Info Area Only

You can restrict a search to data in a specific info area. Searching in the entire database may take a long time when dealing with large volumes of data.

To search for data in a specific info area:

1. Click on  and select the desired info area, e. g. **Companies**.

   All the records in the info area are listed.

2. Enter your search criteria in the **Search** bar. Data is searched as you type and hits are listed below the **Search** field.

   Only the fields listed as ghost text in the **Search** field are included in the search. For example, the following fields are searched in the **Company** info area:

Note: Your administrator determines which fields are included in the search bar.

3. Click on an item in the results list to open the record's details.

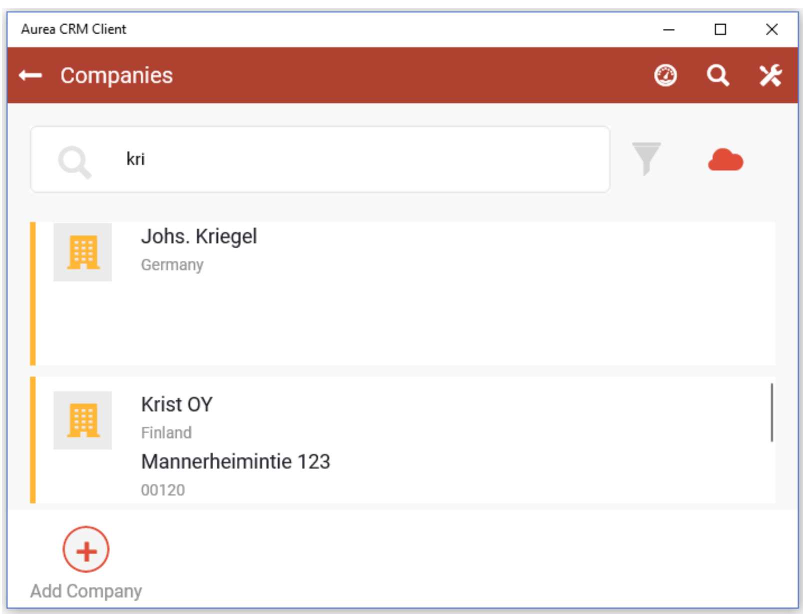
Online Search

You can also search for data online in the CRM database.

Note: Your administrator can define that the online search is started automatically if no matching data is found on your device.

1. Enter your search criteria.
2. If the desired record is not found on your device, click on to search in the online CRM database. The search button changes to .

   The search results available online are indicated by a cloud symbol in the results list:



Note: If you lose your network connection after searching online, the search result still lists the records that are available online. However, if you try to open an online record, an error message is displayed.

3. Click on an entry in the results list to switch to the record's details.

Note: Catalog values cannot be found when you search online in the main CRM database. The search can only find catalog values stored on your device.

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   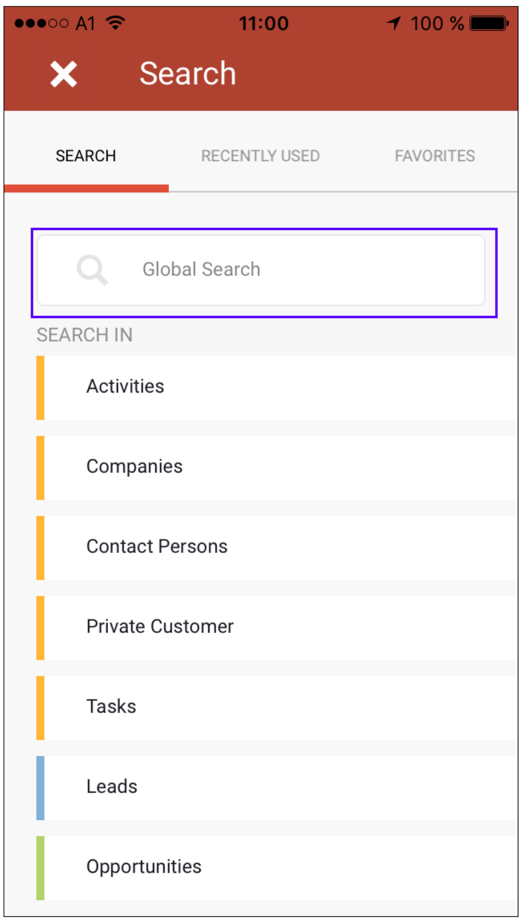

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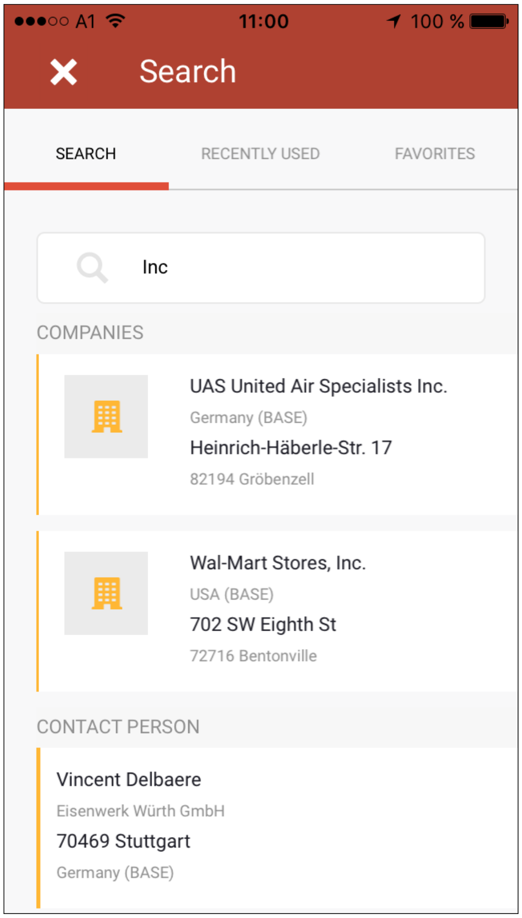

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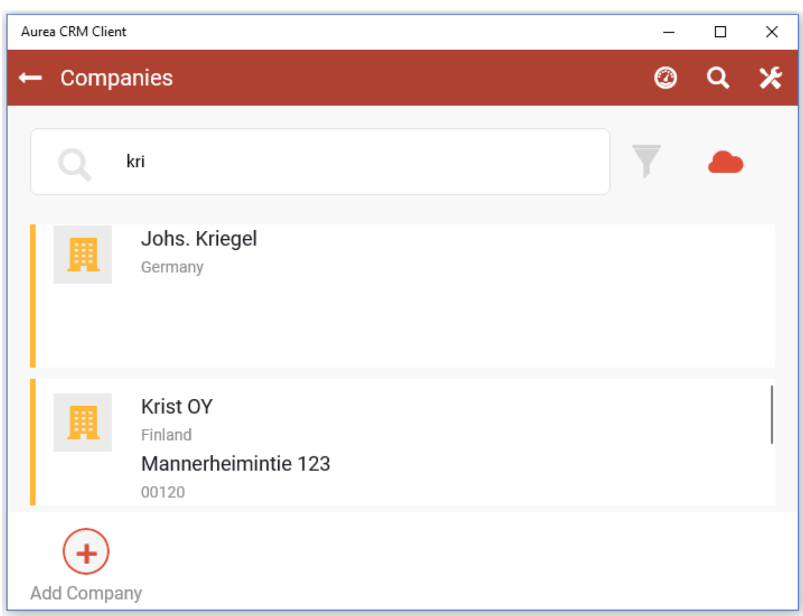

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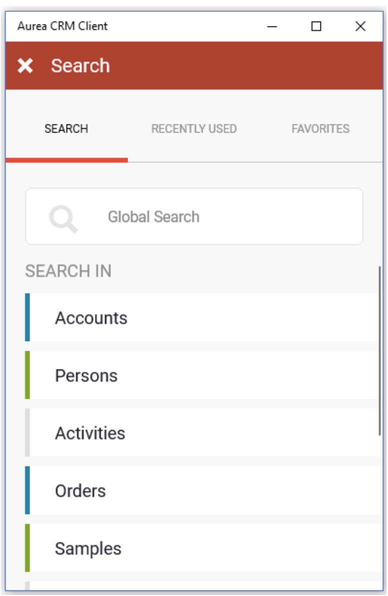
Note: Catalog values cannot be found when you search online in the main CRM database. The search can only find catalog values stored on your device.

Viewing Records

Learn how to view records on CRM Client.

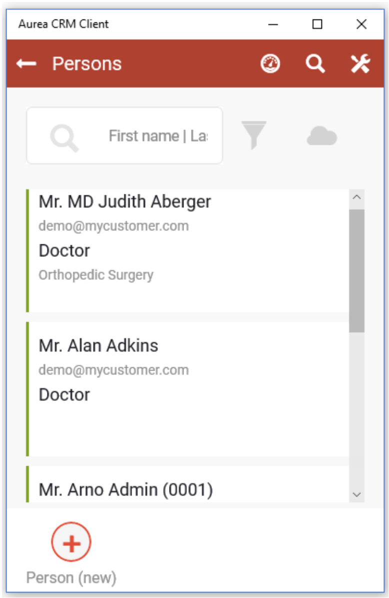
To view a record:

1. Click on  to display the menu.



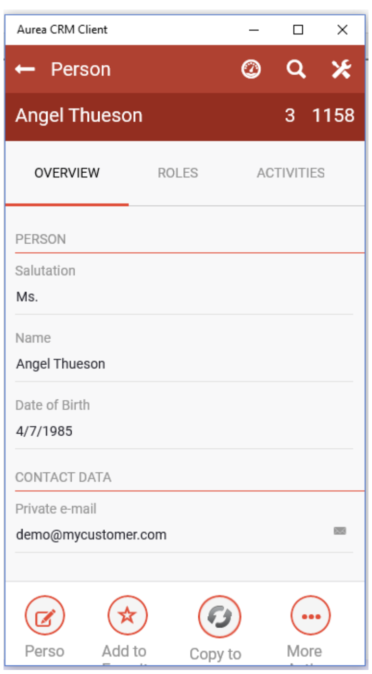
2. Either enter search criteria or select the desired info area (e.g. **Persons**).

   The available records are listed.



The most important information for a record is displayed in list view. Your administrator is responsible for defining what data is displayed.

3. Click on the desired record to display its details.



Click on the tabs to view the details of related info areas. For example, Roles and Activities in the above screenshot.

Note: Fields that are empty are not displayed, except in the Grid View on page 27. Fields with a link are displayed with a link icon to the right of a field.

In addition to the record's details, further information may also be displayed (depending on the info area and your configuration):

- The administrator can also add a graphic to records (for example the customer's logo) to a client's account or a photo to a person.
- Your administrator defines that a list is displayed, e.g. your upcoming calls. The number of records in the list is also defined by the administrator. If more records are available, click on **View more** to switch to the list of all records.
- Depending on your configuration, you can edit data, add child records, or switch to child records.

Viewing Related Data

Related data can be accessed in tabs from the details view. Tap on the desired tab to list available related records. Then tap on the desired record to view its details.

Adding and Editing Records

Depending on your access rights and configuration, you can edit or add records.

Editing Records

If you are allowed to edit records, the  icon is displayed in the header.

To edit a record:

1. Switch to the desired record.
2. Tap on .
3. Edit the data.
4. Save the record.

Deleting Records

The standard version of CRM.Client does not include this option. Your administrator can define that you can also delete records.

Predefined Filters

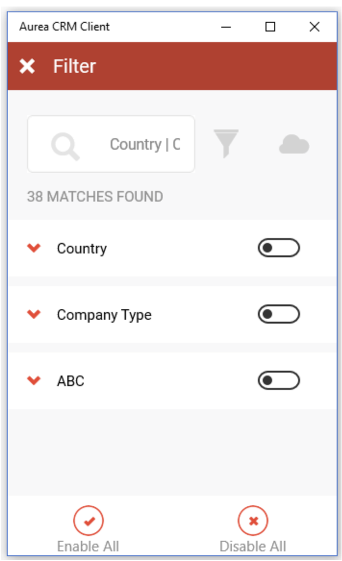
Your CRM.Client administrator can define additional filters (not included in the standard version).

In this case, a (**Filter**) button is displayed besides the search field. The filter is grey in color when it is not activated. If you select a filter, the search result is limited to the records that meet the pre-defined filter criteria. If defined, filters are available from an info area's record list.

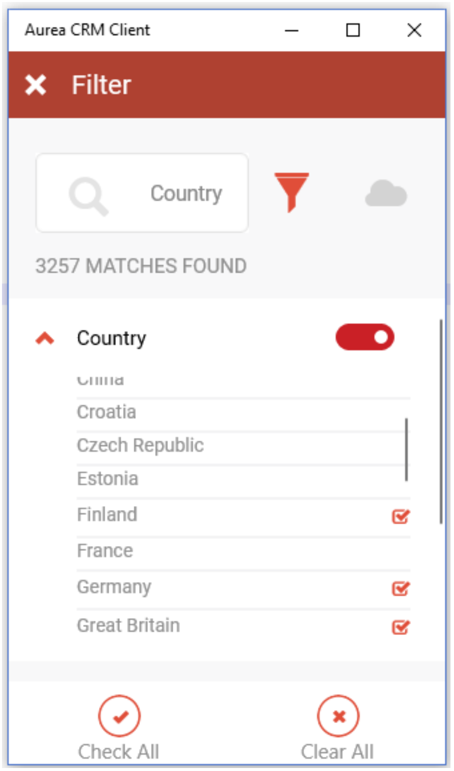
To filter data:

1. Switch to the desired info area.
2. Click on (**Filter**).

   The available filters are listed. Each filter has an on/off switch.



3. You need to select filter criteria for some filters before you can enable them. For example, if you want to limit the listed records to your clients in a specific country, click on beside the **Country** filter and then select the desired country from the drop-down list. After selecting the required countries, you can enable the Country filter using the on/off switch.



4. Enable the desired filter using the on/off switch. Once a filter is activated it is immediately applied to the search list.
5. Click on ^ to collapse the drop down list.
6. Similarly perform the above steps to add more filter criteria. You can combine multiple filters. The search results are filtered as each filter is activated.
7. Click to return to the search listing with the filters activated.

5

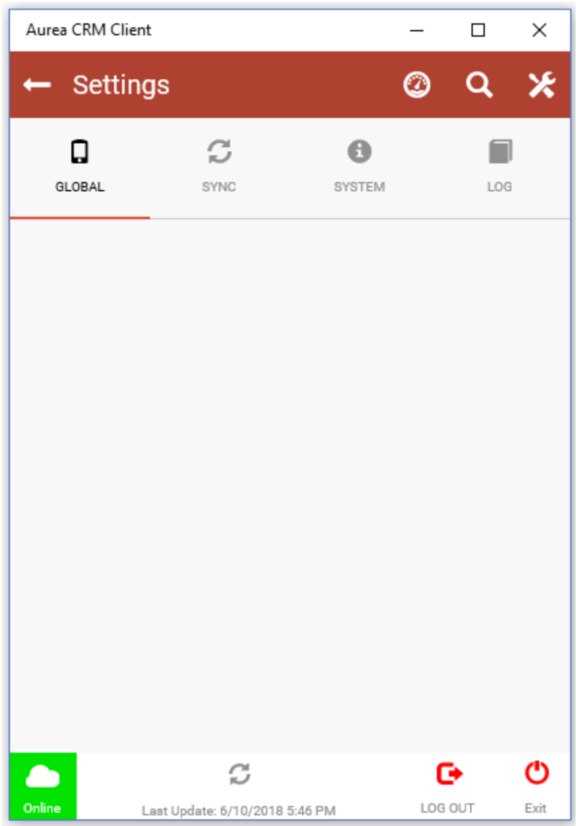
Control Center

You can access the control center from anywhere within the application.

The control center provides access to basic functions, such as synchronizing data, displaying system information and log files etc.

To access the control center:

1. Click on .
2. The control center opens displaying the (**Global**) area.



3. You can:
   - Click on  to return to the application.
   - Click on  to logout of CRM.Client.
   - Click on  to logout and close the CRM.Client application.

Switching Between Online and Offline Mode

You can switch between online and offline mode in the control center.

To switch between modes:

1. Open the control center.

   The current state (online or offline) is displayed in the bottom left corner.
2. Click on 

 to switch to offline mode.
3. Click on 

 to switch to online mode.

Synchronizing Data

By default, data is stored locally on your device when working with CRM.Client.

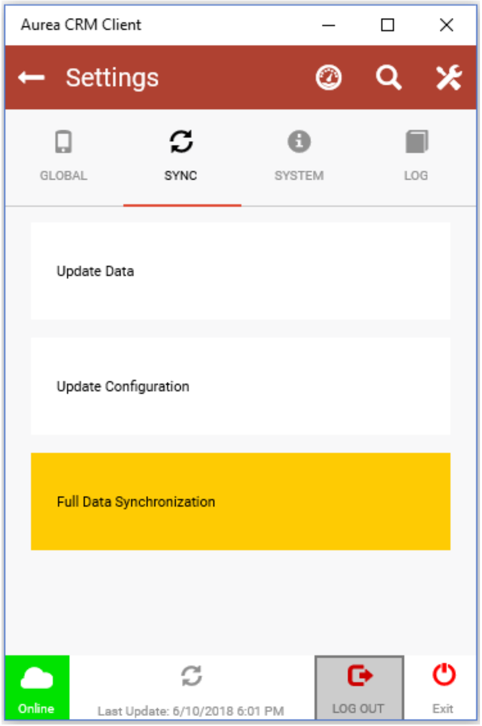
If you add or edit data, these changes need to be synchronized with the main CRM database. New data added on your device is synchronized automatically at regular intervals. The interval depends on the technology you are using, e. g. WIFI: every five minutes, 3G: every hour, EDGE: every two hours.

Only data is synchronized automatically. To update your configuration changes, you need to start the synchronization process manually.

Note: Navigation in CRM.Client is disabled during synchronization to prevent data or configuration changes.

To synchronize data manually:

1. Switch to the  (**Sync**) area in the control center.



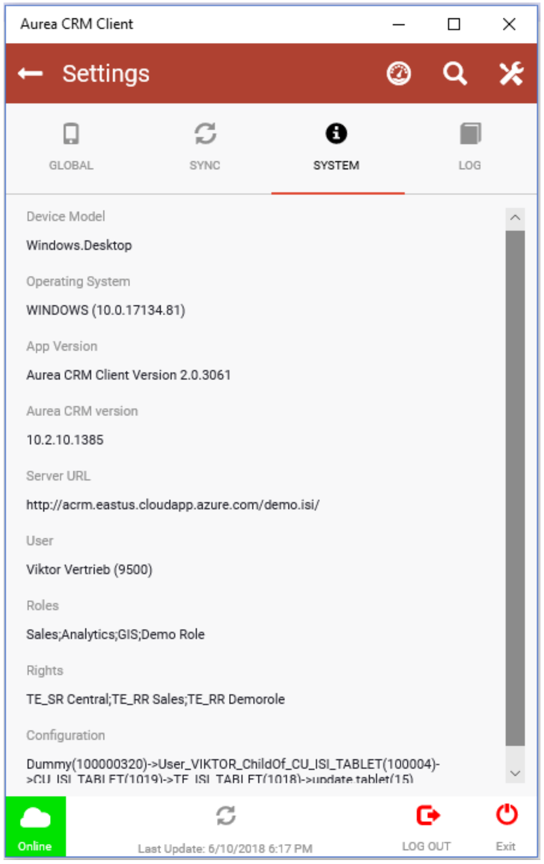
2. Select one of the following options:
   - **Update Data**: Only records are synchronized.
   - **Update Configuration**: Changes to your configuration are transferred from the server to your device.
   - **Full Data Synchronization**: All data and your configuration is synchronized bi-directionally. This is also called a full synchronization.

     Your administrator can define that you need to carry out a full synchronization at regular intervals. If you do not perform a full synchronization in this case, you are unable to log on to the application. You are reminded by CRM.Client.

Viewing System Information

You can display information regarding your operating system, CRM.Client version, Aurea CRM web version and more.

To view the system information, switch to the  **(System)** area in the control center. The system information is displayed.



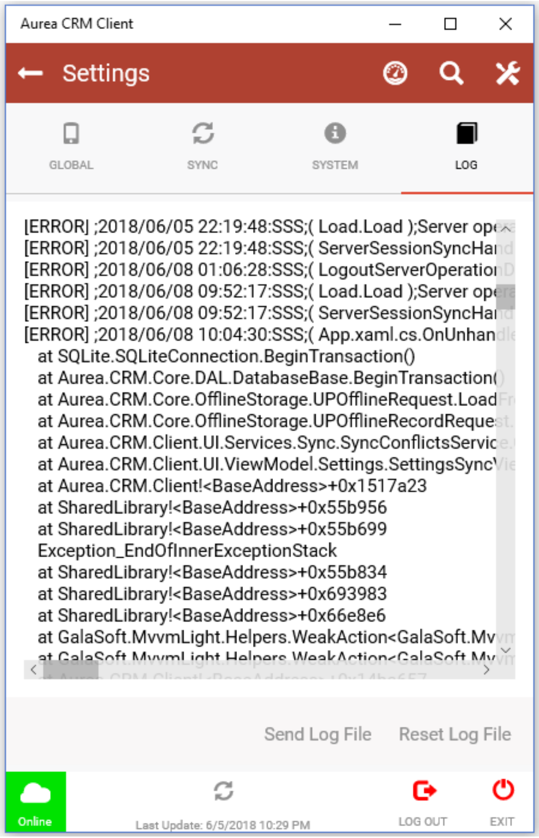
Viewing Log Files

If errors occur, you can view the log file and send it to your administrator by e-mail.

To send the log file:

1. Switch to the (**LOG**) area in the control center.

   The log file is displayed:



2. Click on **Send Log File**. Your e-mail client is started and the log file is automatically added to the e-mail as an attachment. Your administrator's e-mail address may also be entered automatically, if the system is configured accordingly.
3. Click on **Reset Log File** to clear the current content.

6

Additional Features

Explore additional special features and functions in CRM.Phone.

Timeout

Your administrator can define a timeout for your session.

If a timeout has been defined, you are logged out of CRM.Client when switching to another application and CRM.Client is idle for this amount of time. In this case you need to log on to the application again.

Lost Server Connection

You may be unable to establish a connection with your server even though an internet connection is available.

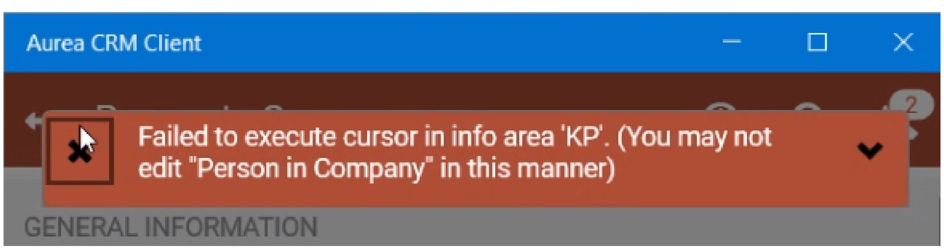
In this case, only the message **Please wait, data is loaded** is displayed after logging on (instead of the Start Page).

Try to switch to an info area (e. g. Persons) from the menu. If data is displayed, this indicates that you can access the offline data stored locally on the device.

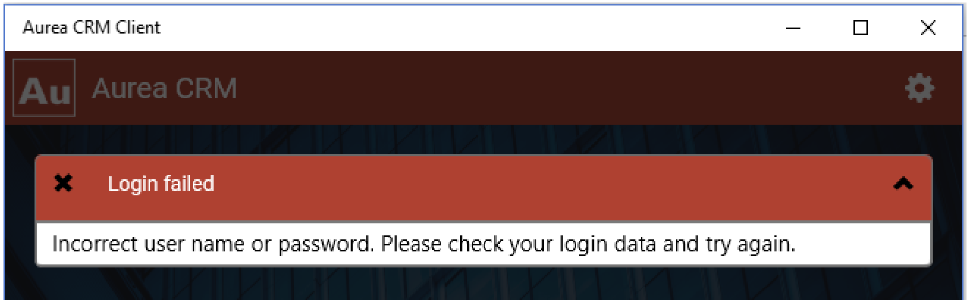
Error Messages

Error messages are displayed as toaster messages.

The toaster messages stay on for a few seconds before they are removed. Error messages are displayed at the top of the screen:



You can display more information about the error message. Click on  to display additional details:



Conflicts

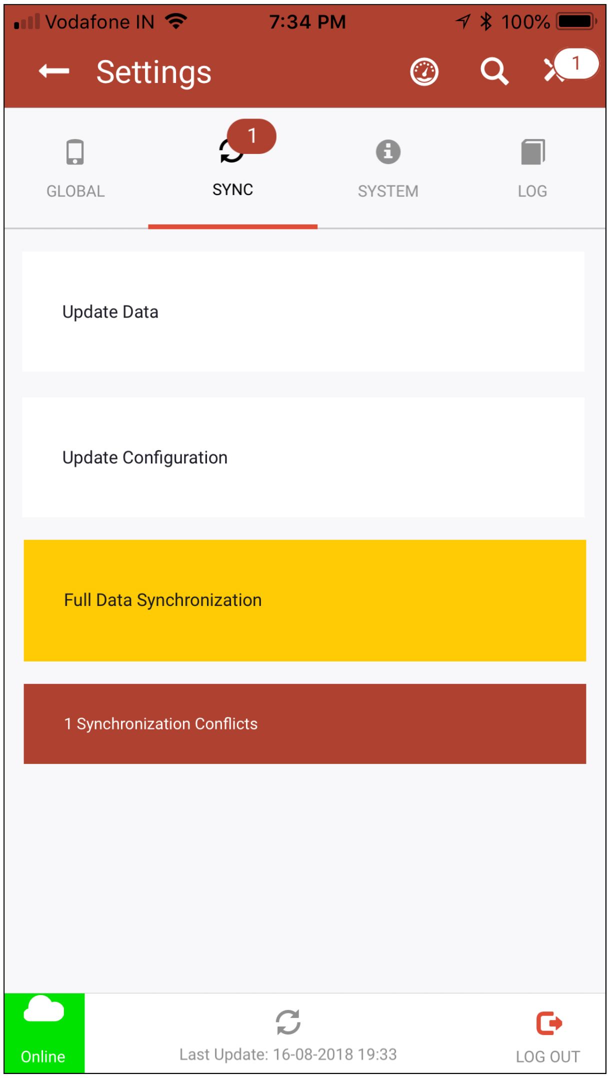
Conflicts in the data can occur due to a number of reasons.

For example, you can edit data in offline mode and the changes are stored locally, and synchronized automatically once the device is online.

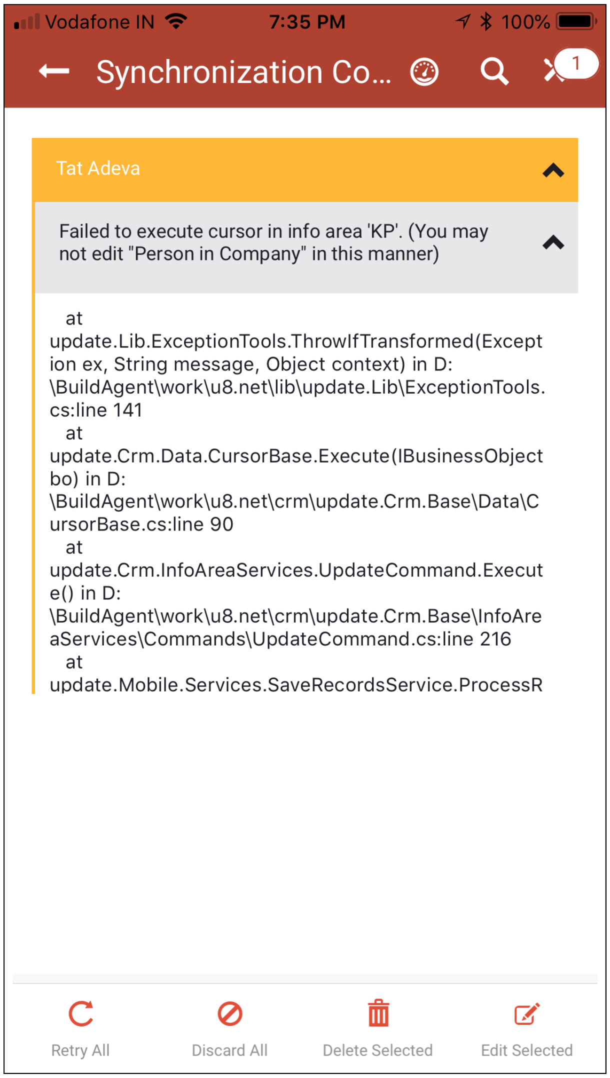
However, sometimes data cannot be updated, e. g. because your administrator changed your access rights and you are no longer permitted to update a specific record. In this case, the affected record (and its child records) is stored locally and marked as blocked.

You are informed about the synchronization conflict with the total number of conflicts that need to be fixed displayed on the control center icon. To fix the conflicts, perform the following:

1. Open the Control Center. The control center displays the Sync tab. In the screenshot below the number of conflicts, two in this case is displayed in a circle on the control center icon () and the Sync tab icon ().



2. Click on the **Synchronization Conflicts** button in red. The **Synchronization Conflicts** page displays listing the error records.



3. Click on each listed record and fix the errors in the records.
4. Once the problem has been fixed, click on **Retry All** ( ) to synchronize all pending records.

Defining Log File Content

If you encounter problems with CRM.Client, your administrator can ask you to activate specific log file content in your CRM.Client Settings page.

Note: As activating log file content can impact performance, only change these settings when asked to do so by your administrator.

Contact your administrator for further information.