



Customer Relationship
Management

CRM.Mobile User Manual

Version 14.1

Notices

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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
<code>Fixed-width</code>	<code>Fixed-width</code> font indicates code, path names, file names, environment variable names, parameter names, command names, machine names, URLs.
Fixed-width	Fixed-width font is used to indicate user input or to emphasize certain lines of code.
<i>Fixed-width</i>	<i>Fixed-width</i> font indicates a placeholder for which you must supply a value.
Sans serif	sans serif typeface indicates the names of graphic user interface elements such as dialog boxes, buttons, and fields.
<i>serif</i>	In text, <i>serif</i> 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 <u>-LOGFILE</u> parameter in a command, you only need to enter <code>-LOGF</code> .
[]	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 at <https://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

CRM.mobile overview

Much like Aurea CRM, CRM.mobile enables you to search through CRM databases, add records, edit records, delete records, synchronize data, and many others.

CRM.mobile allows users to access CRM data online from their mobile devices, e.g. a smartphone. With CRM.mobile, you can access customer information, process orders, and comprehensively manage your accounts remotely.

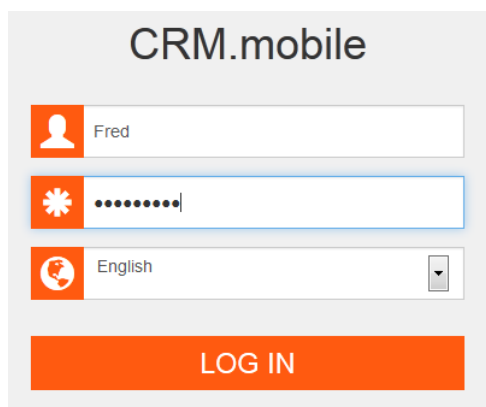
CRM.mobile gives you the ability to look up customer data and contact details. You can use CRM.mobile to plan and document activities that allows you to engage with your customers and potential leads.

Logging in and logging off

CRM.mobile securely protects your data and requires that you authenticate to gain access.

To log in to CRM.mobile:

1. Tap the URL defined by your administrator to start the CRM.mobile.
CRM.mobile's login page is displayed.



2. Enter your username and password and select a language from the drop-down list.
3. Tap **Log In**. The CRM.mobile start page or the last open record is displayed (depending on your configuration). For further details, see [Start page](#) on page 14

To log off from CRM.mobile:

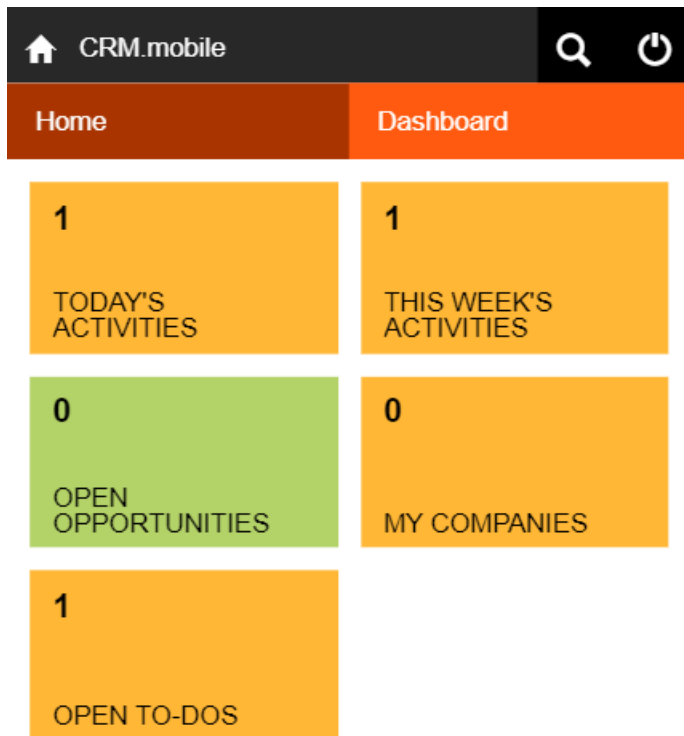
1. Tap  on the start page. CRM.mobile's login page is displayed.

2

User interface

CRM.mobile's user interface uses various elements (tiles, quick actions etc.) to navigate. The elements and functions available to you depend on your configuration, the current record, and the current area.

Use the back button on your device to switch to the previous area.



Whenever you scroll, data and interface elements are loaded dynamically.

CRM.mobile's user interface can be configured by your administrator to meet your

Rep/Group ID

Subject

Escalate

Type

Appointment Planning

Assigned by Rep ID

Super User

ASSIGNED BY REP GROUP ID

Due on

mm/dd/yyyy









individual needs.

Fields and labels can be modified by your administrator.

Application menu

The application menu is displayed at the top of the current page. Here you will find the most common options for your current page.



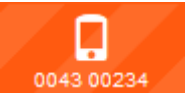
Depending on the current area, the application menu can contain the following options:

CRM.mobile main menu	Description
 Start Page	Tap this button to open the start page. For further details, see Start page on page 14.
 Log out	Tap this button to log out of CRM.mobile.
 Search	Opens the search field where you can enter search query. For further details, see Searching on page 19.
 Edit	Switches the current record to edit mode.
 Save	Saves the current record.
 Cancel/Close	Ends edit mode without saving any changes or closes the search.
 Extended actions	Provides access to further actions available for the current record, e.g. add an activity for a company. For further details, see Adding and Editing Records on page 21. If you open the extended actions in the overview or details view of a record, the actions apply to the current record. Extended actions accessed from a list (e.g. a results list) do not apply to a specific record.
 New	Adds a new record.

Quick actions

Your administrator defines quick actions that allow you to quickly access the functions you use most often (e.g. adding records, displaying company locations on the map).

By default, CRM.mobile includes the following quick actions:



CRM.mobile Quirk actions button	Description
	<p>Adds a new record (e.g. an activity).</p> <p>Your administrator can define default values for new records, e.g. the current date and time can be entered by default in new activities.</p>
	<p>Displays the location of the current company or person on a map (external application). The map application is device-dependent.</p>
	<p>Opens an external application, in this case for telephone calls. Other external applications include Bing Maps, your e-mail client, etc.</p>

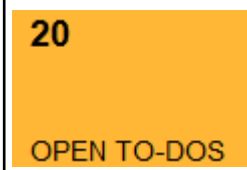

Note: Your administrator can customize these quick actions icons.

Tiles

Your administrator defines tiles that provide you with an overview of the most important information entered in the current record, such as a company’s ABC classification, revenue, the number of activities, etc.

The **Dashboard** available on the start page contains several tiles that allow you to access specific information, such as today’s appointments or open opportunities. For further details, see [Start page](#) on page 14.

Default configured tiles	Description
	<p>Displays the ABC classification of a company.</p>
	<p>Displays the number of child records. In this case, the number of activities.</p>

Default configured tiles	Description
	Displays the results of a predefined search. In this case, the number of open To-Dos.
	Displays the type of activity and its priority.

If there are more tiles than can be displayed on the screen, scroll the page to load additional tiles.

Fields






Fields are containers where you input data in CRM.mobile. Your administrator defines which fields are required to have input.

Tap a field to enter data in it.

Note that some fields are combined in display mode, but are separate fields when editing records. For example, the **Street**, **Postal Code**, **City**, and **Country** fields in a company are displayed together in the **Address** field in the details view.

Note: Your administrator can define default values for specific fields.

Depending on the data stored in a field, an icon may be displayed next to the field:

Common icons of fields	Description
 Telephone	Opens the number in your external phone application (device-dependent).
 Linked record	Opens the linked record.
 Website	Opens the URL in a new window or tab.
 E-mail	Opens your e-mail client in a new window and transfers the e-mail address to the To field.
 Map	Opens a location in your map application in a new window or tab.


Note: Some devices do not support opening new windows or tabs.

Link fields

Link fields are fields that are linked to another record.

When adding and editing records, the  icon is displayed next to link fields.

To link a record with another record:


1. Tap on . The search field is displayed. For further details, see [Searching](#) on page 19.
2. Tap on the desired record to select it.


Note: You can change the record entered in a link field, but you cannot delete the link.

Note: When you select a record, data from its parent record may be transferred to the current record (if configured by your administrator). For example, a link to the company a person works at could be entered when selecting a person.

Lists

Search results and child records like the activities or orders added for a company are displayed in lists.

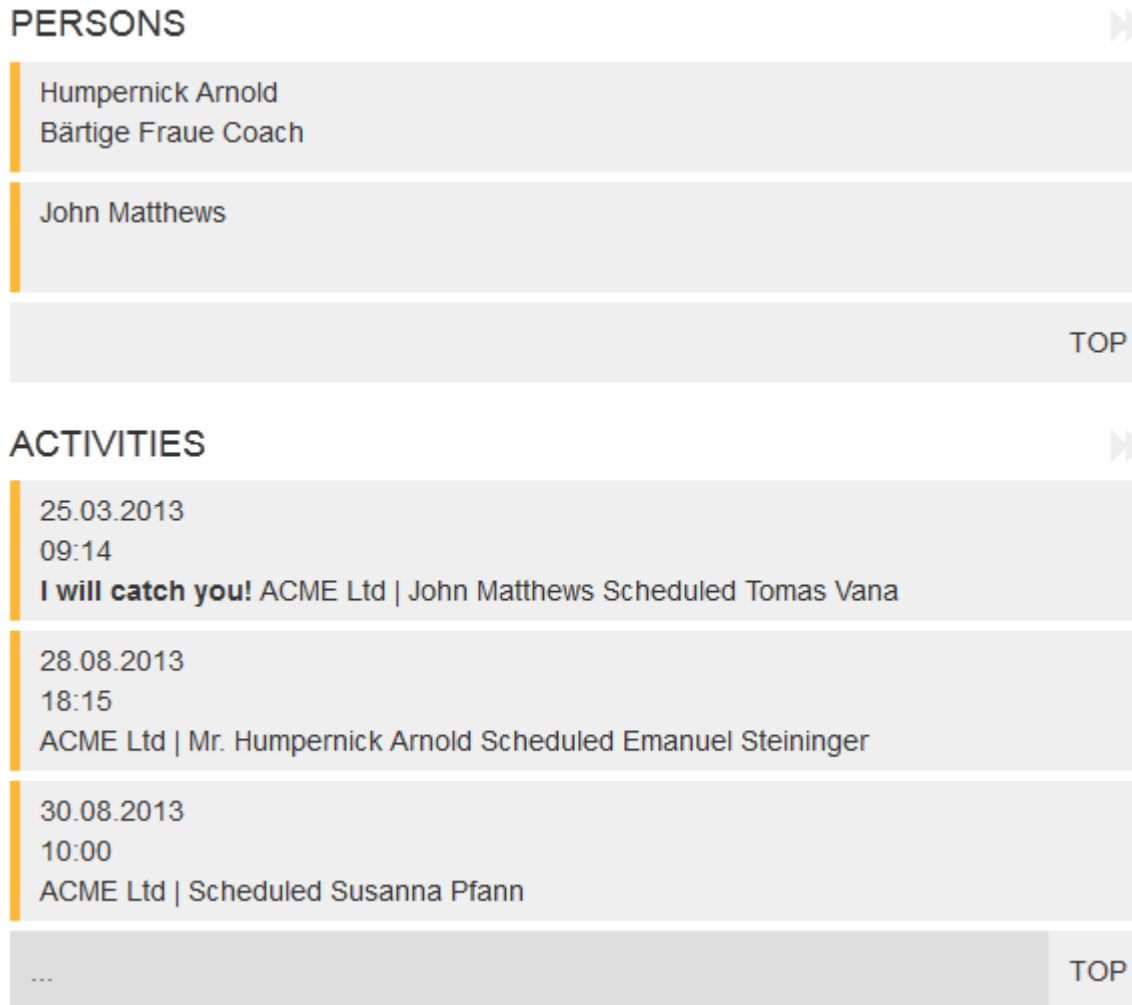
List icons	Description
	If the list contains more entries than are displayed, click here to display more records.
TOP	Returns to the top of the list.

Tap on a list header or on  next to the header to open a new page containing only this list.

Tap on a record to open it.

You can scroll if the page contains more data than fits on your screen.

Figure 1: Example of a list



Start page

The start page contains two tabs: **Home** and **Dashboard**.

By default, the **Home** tab displays your upcoming activities.

The records you opened most recently are listed under **Recently Used**. The most recent record is listed at the top.

Various quick actions are available. For further details, see [Quick actions](#) on page 10 . For example, click on **New Activity** to add a new activity containing the current date and time.

Tap on  and  to display earlier or later activities.

Tap on an activity to open it.

Tap on  to display the calendar. For further details, see [Calendar](#) on page 26.



CRM.mobile

Home Dashboard

ADD ACTIVITY ADD TO-DO

MY NEXT ACTIVITIES

16³⁰ 17 December Tuesday 2013

update Test AG
Ms. Josefa Testperson
Drinks with the boss

RECENTLY USED

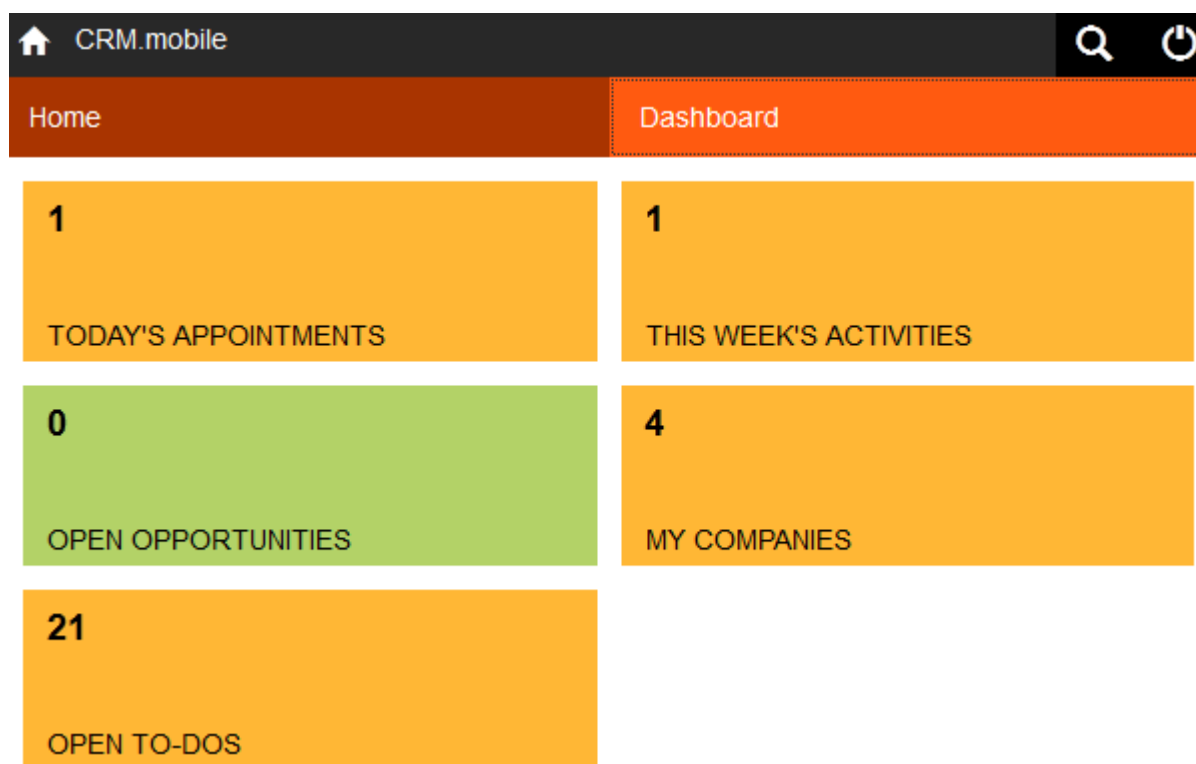
17.12.2013
16:30
Drinks with the boss update Test AG | Ms. Josefa Testperson Scheduled Super User

ACME Ltd
Schlatten 13 Bromberg
Austria

06.12.2013
12:00
Letter of Intent ACME Ltd | Scheduled

The **Dashboard** tab displays tiles that show the results of predefined searches. Tap on a tile to view the corresponding records in list view.

Note: Your administrator can configure the tiles.



Overview and details

If you tap on a record, the record is either opened in an overview or in the details view.

The details of the record and child records are displayed. For example, when displaying a company, the persons, activities and offers linked to the company are displayed.

You can add and edit records. For further details, see [Adding and Editing Records](#) on page 21.

Depending on your settings, various quick actions (e.g. add a note) and tiles (e.g. the number of activities) are displayed. For further details, see [User interface](#) on page 8.

Note: Your administrator can configure the overview and details view and define which quick actions and tiles are displayed.

Tap on **Overview** or **Details** to switch between views of a record. You can also tap on « and » next to the **Overview** and **Details** headers.

Tap on a tile linked to a search result (e.g. the number of activities) to display the corresponding records. The results list is displayed. Tap on the tile containing information (e.g. revenue) to switch to the details view.

All details on the record and its child records are displayed, e.g. the company and the associated persons and activities.

Figure 2: Overview of a record

The screenshot displays a mobile application interface for a company record. At the top, a dark header shows a home icon and the text 'Companies'. Below this, an orange banner features the company name 'ACME Ltd', a mobile phone icon with the number '0043', and a location pin icon with the address 'SCHLATTEN 13 BROMBERG'. The main content area is titled 'OVERVIEW' and contains three orange boxes: 'A' (with 'ABC' below), '300.000' (with 'REVENUE' below), and '5' (with 'ACTIVITY' below). Below the overview is a 'PERSONS' section listing 'Humpernick Arnold' (Bärtige Fraue Coach) and 'John Matthews'. A 'TOP' button is visible at the bottom of the persons list. The 'ACTIVITIES' section shows two entries for 'ACME Ltd | Scheduled' and a detailed entry for '25.03.2013 09:14' with the text 'I will catch you! ACME Ltd | John Matthews Scheduled Tomas Vana'.

Figure 3: Details of a record

Companies

ACME Ltd

0043

SCHLATTEN 13
BROMBERG

DETAILS

General Information

COMPANY
ACME Ltd

ADDRESS
Schlatten 13
Bromberg
Austria

ACTIVITIES

06.12.2013
12:00
Letter Scheduled

19.11.2013
10:06
Telephone Scheduled

... TOP

PERSONS



Humpernick Arnold
Bärtige Fraue
Coach

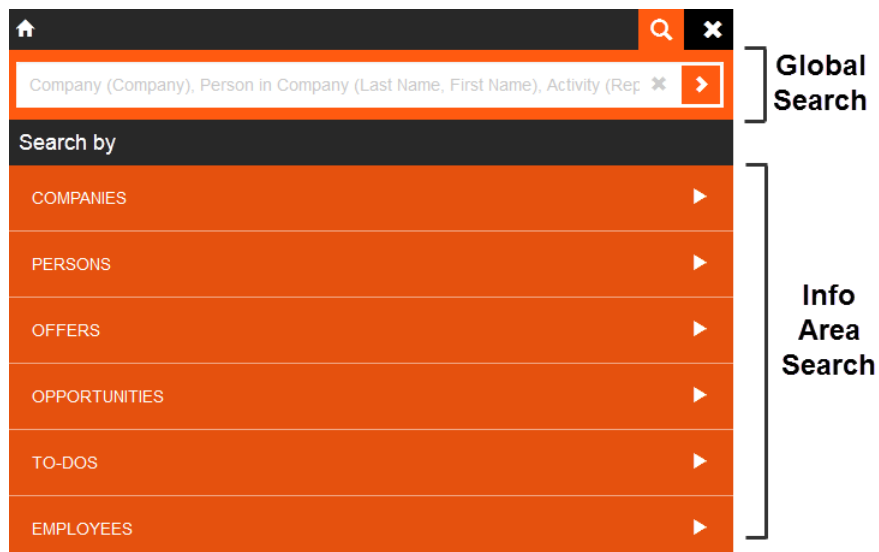
John Matthews

TOP


Searching

You can access the search from the start page (global search and info area search).


Tap on  in the application menu to open the search. Tap on  to close the search. If you search from the start page, the search contains a global search area and search areas for individual info areas. When returning to the search from the global search results, the global search is also opened.



If no search term has been entered, the fields that the application searches in are displayed in the search field. For example, the global search searches for persons with matching first or last names. The search term will be found if it is entered in any of the fields, i.e. when searching for "James", the search will return all persons whose first or last name is "James".


Note: You can use the * wildcard. If you do not enter a wildcard, the search terms are treated as though the * wildcard is present at both the start and end of the search term. This means that searching for 'b' will return all companies whose name includes a 'b' anywhere in their name (e.g. "Bem", "ABC", "Aicob"). If you search specifically for "b*", only those companies whose name begins with 'b' are found (e.g. "Bem"). The search is not case-sensitive. Tap on  to clear the current search term.

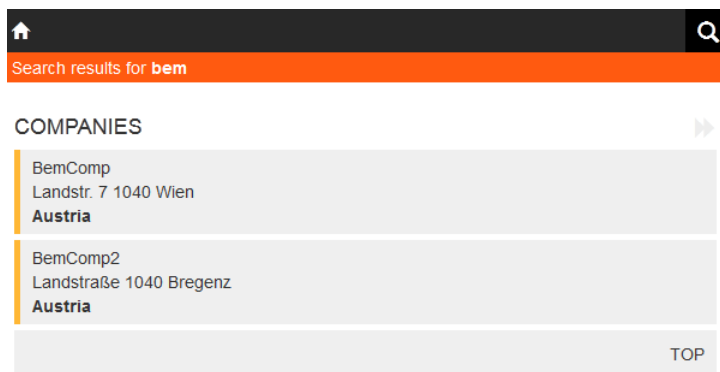
Note: You can search for dates using the following formats: YYYYMMDD and DD.MM.YYYY (e.g. 20131206 or 06.12.2013 for 6 December 2013).


Enter a search term and tap on  to start the global search. All hits in the global search areas (e.g. companies, persons, activities) are displayed.

Tap on a list heading to display the list of results in just that info area.

Click on one of the info areas under **Search by** to search in a specific info area.

Tap on , e.g. next to Companies to search in a specific info area. The search only searches in the selected info area and displays the results, for example, the matching companies. When searching in a specific info area, the system searches for the search term in the search fields defined for the info area (e.g. Company, Synonym, Country, City and Postal Code for companies).



Tap on  in a list to search in the current info area (e.g. search for companies). Apply or remove filters by clicking on them or to return to the global search. The search term is only searched for in the current info area. Filters are applied to the search as additional criteria (using a logical AND) alongside your search term.



Note: Your administrator defines filters for you.

3

Adding and Editing Records

Records can be modified in CRM.mobile. You can add and edit certain records determined depending on the permission set by your administrator.

Note: Your administrator determines which records you can edit and add.

Note: By default, you cannot delete records or add catalog values in CRM.mobile.

Adding Records

CRM.mobile allows you to add records like to-do lists and and activities.

You can add records in CRM.mobile using quick action and extended actions (⊞). If only a single extended action is available, **+** (**New**) is displayed instead. For further details, see [User interface](#) on page 8.

To add a new record:

1. Switch to the area where (e.g. results list) you want to add the record or open a record to add a child record. For further details, see [Searching](#) on page 19.
2. Tap on **⊞ Extended Actions** in the application menu.


The actions available for the current record or area are displayed:



Note: Your administrator can define default values for specific fields. When adding a new record, the default values are automatically entered in the corresponding fields.

3. Select an option to add a new activity.
4. Enter data on the fields.

Mandatory fields are highlighted in red.

5. Tap on  or tap on to save in the application menu.

The new record is displayed.


Note: If you add a To-Do and link it to a ticket, you cannot edit the date and time of the To-Do once the record has been saved.

Note: When adding an activity, enter the start date and time, duration and time units (e.g. minutes or days). If the **Create To-Do** field is enabled, To-Dos are added for all participants (for activities scheduled in the future).

Editing Records

Updating a record in CRM.mobile is possible depending on the permission set by the administrator.

To edit a record:

1. Switch to the desired record. For further details, see [Searching](#) on page 19.
2. Tap on edit to switch to edit mode.
3. Edit the record.
4. Tap on  or tap on to save in the application menu.

The record is displayed.

Selecting reps

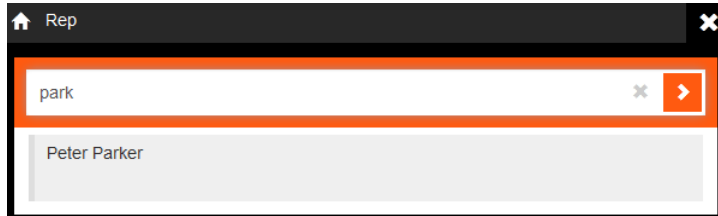
You can enter reps in specific fields. For example, when adding an activity, you are automatically entered in the **Rep ID** field. You can assign activities to your colleagues by entering them instead.

A rep is a representative of a company who can login to CRM with certain rights for performing administrative, technical, business tasks, etc.

To select a rep:

1. Tap on  next to the **Rep ID** field. For further details, see [Link fields](#) on page 13.

A list of all reps is displayed. Search for the desired rep. For further details, see [Searching](#) on page 19.





2. Tap on a rep to select the rep.

The search area is closed and the rep is entered in the **Rep ID** field.

Adding internal participants

You can add internal participants to activities.

To add an internal participant:


1. Switch to the desired activity and tap on  or add a new activity. For further details, see [Adding Records](#) on page 21.
2. Tap on  under Internal Participants.

A list of all reps is displayed. Search for the desired rep. For further details, see [Searching](#) on page 19.

Note: The list also includes resources and groups. These are indicated with R and G respectively.

3. Tap on a rep to select add the rep as a participant.

The search area is closed and The rep is added to the list of Internal Participants.

4. Tap on  next to the participant.

The available participation types are listed ( Required  Optional and  Informational).

5. Tap on the desired participation type.

The activity record is displayed in edit mode again.

Note: You can subsequently change the participation type.

6. Tap on  next to a participant to remove the participant.




Note: The rep entered in the Rep ID field (by default, the rep who added the activity) is automatically added as a participant with the participation type set to **Required**. This rep cannot be removed as a participant. Change the rep entered in the Rep ID field to change the participant. For further details, see [Selecting reps](#) on page 22.

Note: You can only change your own participation status. To do so, tap on the current status (**Open**, **Accepted**, **Denied** or **Not relevant**) and choose the desired status.

Adding external participants

You can add external participants to activities.

To add an **external participant**:

1. Switch to the desired activity and tap on  or add a new activity. For further details, [Adding Records](#).
2. Tap on  or  under **External Participants** to add a company or persons as a participant.

A list of all companies or the persons in companies is displayed. Enter a search term and start the search to restrict the list of records. For further details, see [Searching](#).

3. Tap on a company or person to add them as a participant.

The search area is closed and the company or person is added to the list of **External Participants**.

You can remove participants and change their participation type and status as with internal participants.

Note: The company or person the activity was added for is automatically entered as an external participant with the participation status **Required**. You cannot delete this company from the list of participants nor change the participation type. You can however change the participation status.

Entering dates and times

Dates and times are important entries when adding or editing records. They can either be mandatory or optional data depending on the type of record you are adding or editing.

To enter a date and a time:

1. Tap on the field where date/time is required (e.g. **Starts on**, **Starts at**).
2. Select your chosen date/time.

The image shows two input fields from a mobile application. The top field is labeled "Starts on" and has a dropdown menu showing "mm/dd/yyyy". Below it is a calendar for "September 2019" with the date "13" selected. The bottom field is labeled "Starts at" and contains the time "02:23 PM".

Starts on

mm/dd/yyyy

September 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Starts at

02:23 PM

The method of entering dates and times depends on your device.

4

Calendar

The calendar displays your activities and free time based on your personal work hours. You can add new activities to the calendar.

To open the calendar, tap on  on the **Home** tab on your start page.





The calendar is opened in the **Month** tab. The **Agenda** tab contains a list of your upcoming activities. By default, activities that start in the past are not displayed.

Note: Your administrator can determine that past activities are also displayed on the **Agenda** tab. Your administrator can also determine the date that is displayed when opening the calendar.

Month

The month tab displays the month of the current date.

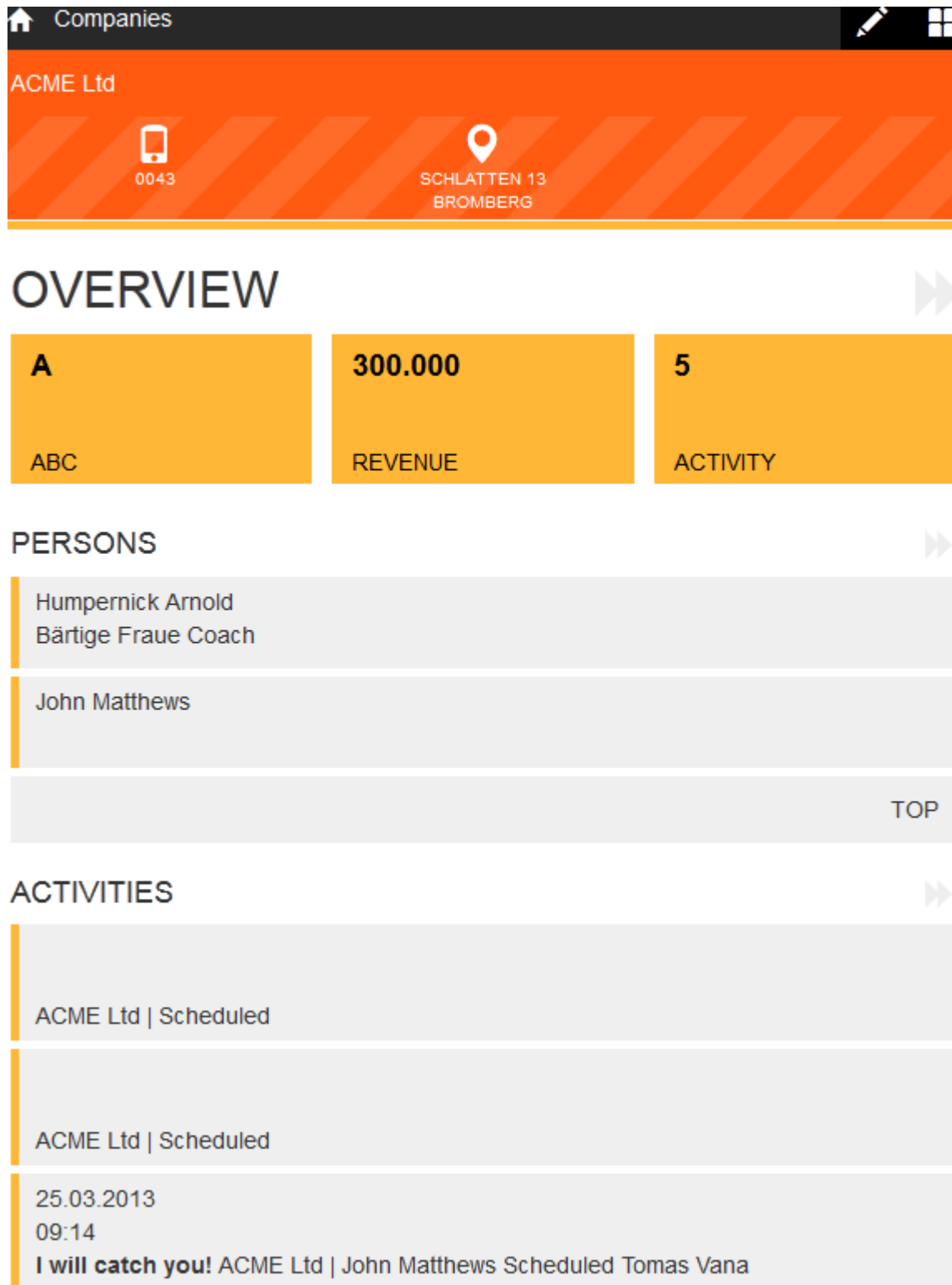
Month Tab

- By default, the current date is selected when you open the calendar.
- The currently selected date is highlighted in orange ().
- The current date is always indicated by an orange border () when not selected.
- The selected day's activities and free time periods are displayed below the calendar.
- Tap on  or  to navigate to the previous or next month. The activities and free time periods beneath the calendar are updated.
- If activities are scheduled for a date, the number is displayed in bold.
- Days in the previous or next month are light gray. Tap on a day to select it and switch the view to that month.
- Tap on a selected day or a free time slot beneath the calendar to add a new activity. For further details, see [Adding Records](#) on page 21.

- Tap on an activity beneath the calendar to open display an overview of the activity. For further details, see [Overview and details](#) on page 16.
- Activities lasting for more than a single day are always displayed at the top of the list, irrespective of when they start.

Note: All-day appointments are ignored when calculating free time periods.

Figure 4: Month tab



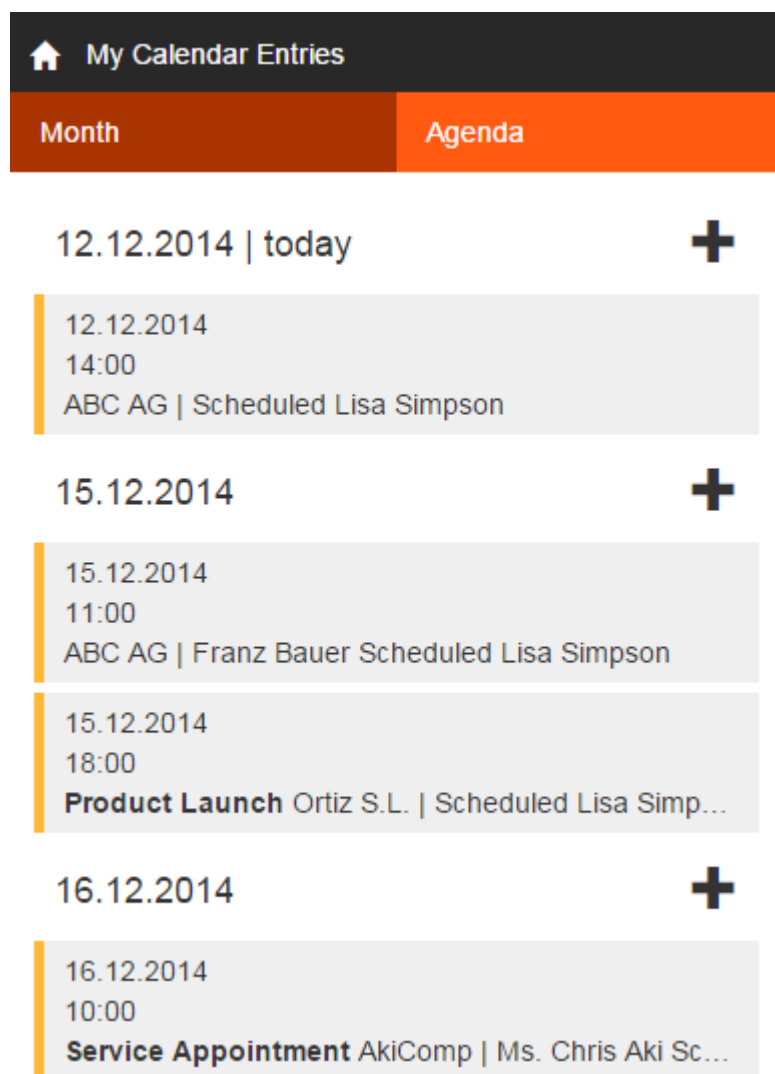
- Tap on **+** next to a date to add a new activity on that day.

Note: When adding a new record, certain values are entered automatically (e.g. **Starts on, Starts at**). You can edit these values. No message is displayed if activities conflict with one another. Your administrator can determine which activities are displayed in the list (e.g. only visits).

Agenda

The agenda displays activities that are scheduled.

Figure 5: Agenda tab



- Tap on an activity to open the overview. For further details, see [Overview and details](#) on page 16.
- Click on an overview of an agenda to see the detailed view.
- To-do list is also displayed in the Agenda tab.