



Section 11

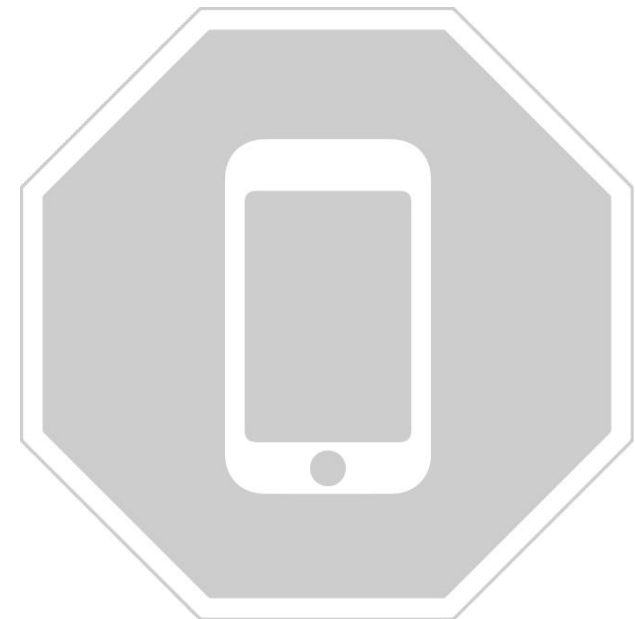
Security

100+ Amazing things you can do with Greentree Software on your phone and tablet

#105

Block all new devices or users

Want to make sure that the users use only the devices that you approved to connect to your CRM server? Then choose to block automatically all new devices. If you do that, users won't be able to access the server from a phone or a tablet that you have not approved beforehand.



#106

Lock or wipe the application remotely

No matter what misfortune meets you, you can keep your cool when it comes to the safety of your data.

System admins can remotely lock the application or wipe out data from it. They have a complete list of every device that has ever been connected to your organization and simply find yours on it. The list shows the owners, type of the device, ID number, even the time of last synchronization with the server, so it's easy to tell which one should be locked or wiped out from the distance. All is safe and sound.

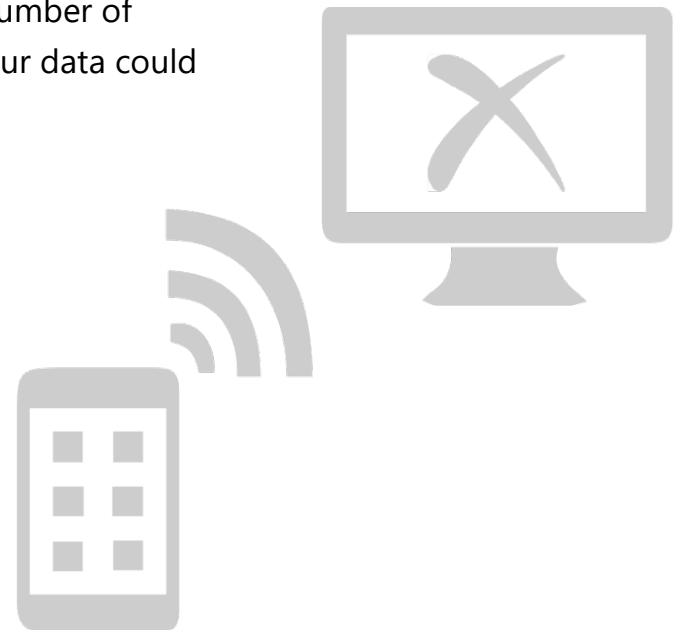


#107

Remotely wipe out data from the app

Accidents happen—you might forget your tablet on a plain or leave it in a cab you take from work. But there's no need to panic if you lost a device with a Mobile CRM full of your valuable data. The system administrator will effortlessly remove all the CRM data stored in the device's local database. From the comfort of his office chair.

Admins can also set up an automatic wipe if the application has not connected to your CRM server for a defined period or if a user exceeds a specified number of incorrect password entries. So you can wipe away the concerns that your data could be exposed to prying eyes.



#108

Lock the app after a certain time of inactivity

To make sure your CRM data won't get into wrong hands, set up a session timeout. This will lock the application after a defined number of minutes and will ask for the password once you return to it. It's up to you to decide whether your timeout is going to be set for 15, 30 or 5 minutes.



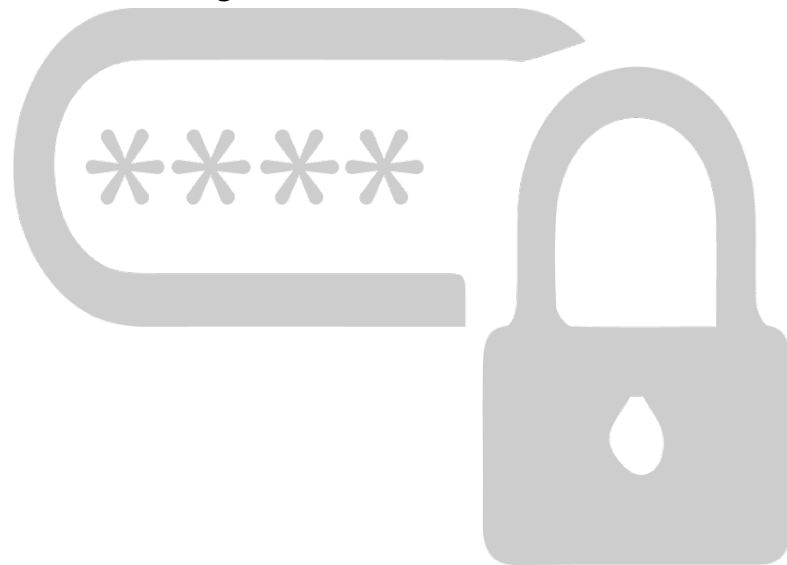
#109

Use the advanced password-protection

Don't let anyone unauthorized access your CRM data. If someone attempts to log in but fails to insert the correct password, let's say 3 times, the application can preventatively lock itself or even wipe its data clean.

The system admin decides how many password attempts is the right amount and can also easily unlock the app afterward—it is just a matter of unchecking a box. Simple, yet effective.

The safety of your data is in your hands.



#110

Access some entities only in online mode

If some of the information stored in your CRM is highly confidential and you can't have it stored in the local database of a mobile device, you can make use of Mobile CRM's online-only entities feature. This means that the users will be able to access the designated entities only when connected to the Internet, and this data won't be stored in the device.

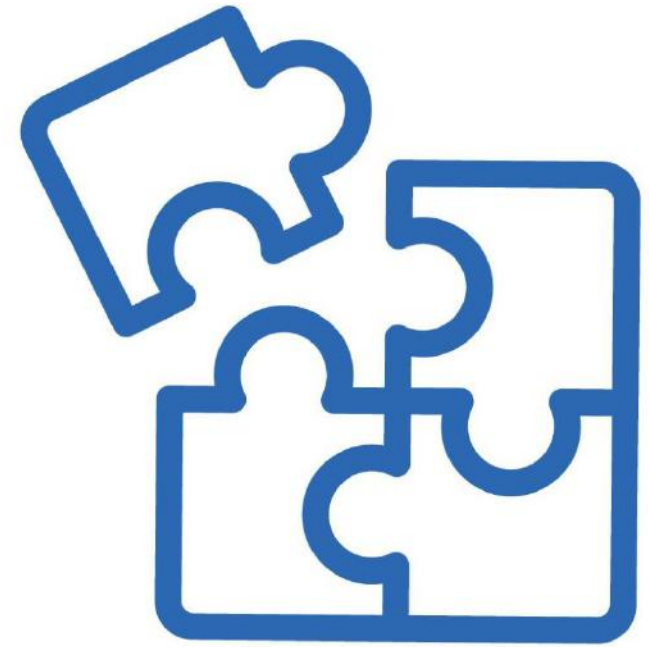


#111

Protect your data with MDM

The CRM data is a one of the main assets of any company and all the devices that access it deserve appropriate protection. Resco Mobile CRM supports powerful mobile device management tools such as Symantec and MobileIron.





Section 12

Miscellaneous

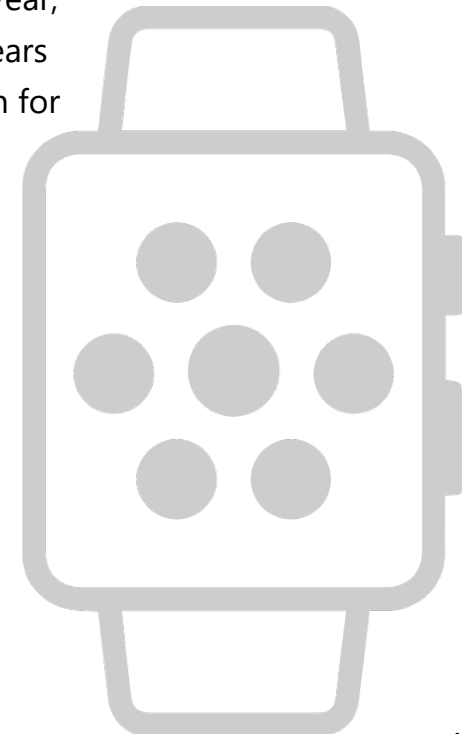
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#112

Look at your wrist, the future is here

Consider smartphones. Since their invention, no aspect of life has remained the same. They had an especially great impact on the business sector—thanks to smart mobile devices, the business now happens on the go, faster and more efficient.

With Apple Watch getting sold out in a matter of few hours just after the official pre-orders started, and other wearable devices flooding the market (Android Wear, Pebble, Moto 360, Sony Smartwatch, Google Glass, Microsoft HoloLens, new gears from Samsung, etc.), you should start considering what's the best wearable tech for you and your business.

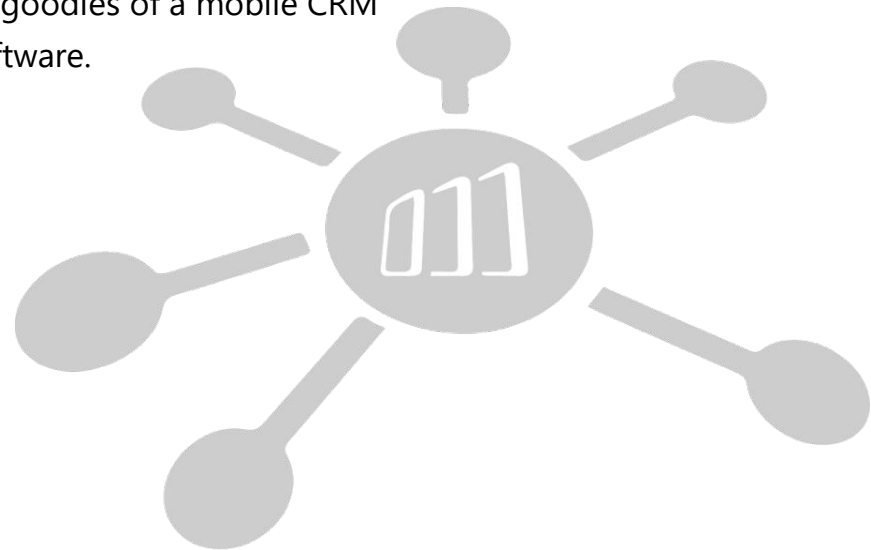


#113

Apt for every company

What version of Greentree Software are you running? No matter what the answer is, Resco Mobile CRM is for you. It supports both, online and on-premise instances and all server versions (4.0, 2011, 2013, 2015 and 2016). On-premise customers can choose their preferred way of exposing the server: AD/AD with VPN/ADFS/IFD.

Are you running Siebel CRM, SAP, Gmail, or have nothing at all yet? There's also a solution for you—[Resco CRM](#) that lets you enjoy all the goodies of a mobile CRM while running on a different system than Greentree Software.



#114

Keep your custom entities & fields

If you customized your Greentree Software server and now have your own, custom entities and fields, you can have them in the mobile app as well. Simply add them to the app with the easy-to-use Woodford configurator and you're good to go.



#115

Access data offline even from your PC

The standard approach is to access your CRM via a browser. Makes sense—that's how it's supposed to be. But what if? What if you could use a CRM application on your desktop/laptop?

Why?

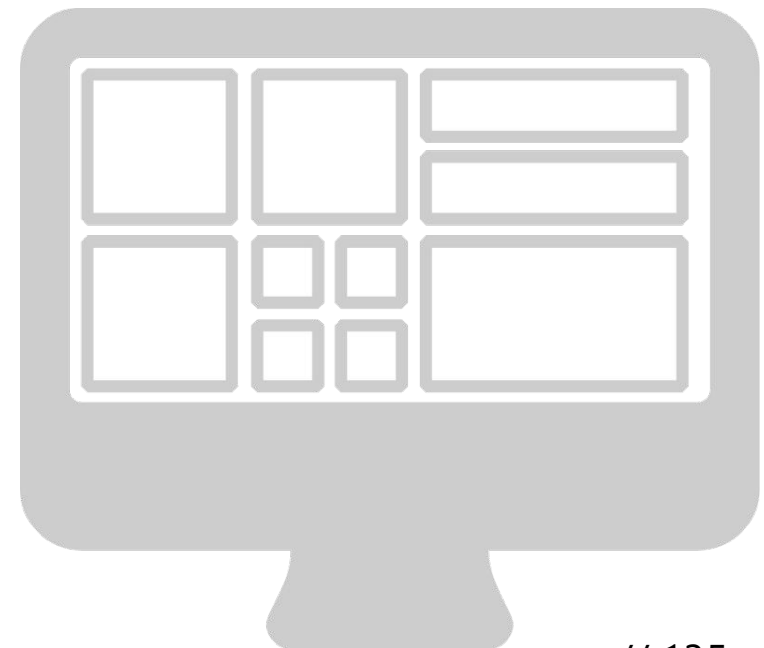
Because you would have offline access to your data! Browser access can get slow at times, and when the Internet goes down, the whole company is paralyzed and losing money minute by minute.



#116

Opt for a simpler user interface

The Mobile CRM desktop application is a great way to offer employees another user interface. Maybe your users find the browser interface of Greentree CRM confusing, unattractive or cluttered. Resco Mobile CRM desktop client will address all of these issues. It can become a lightweight client for those, who need to perform simple tasks and want to do it as easily as possible.





Section 13

It's the little things

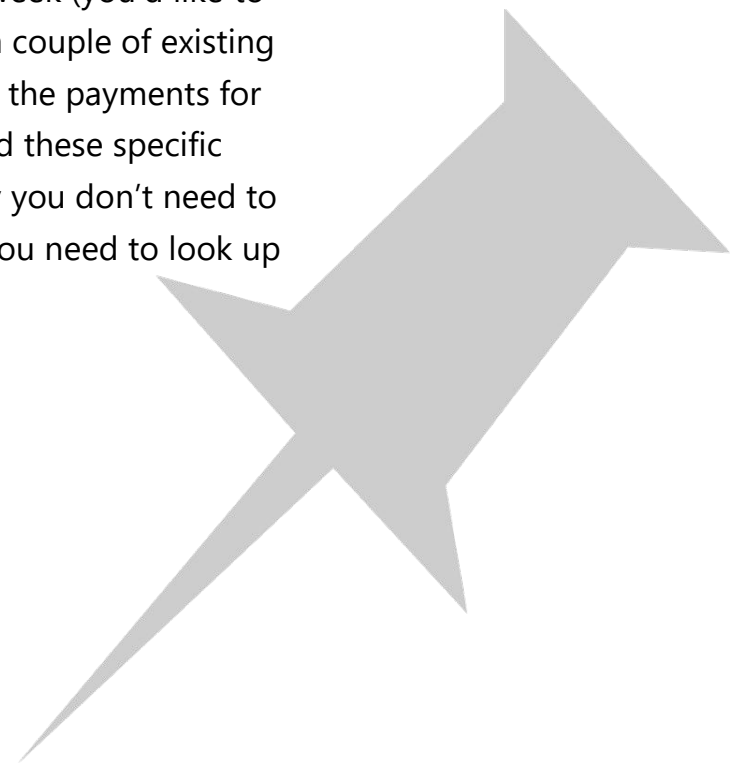
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#117

If you like it, put a pin on it

If you frequently access certain records, pin them to your Favorites—a special section that lets you make a collection of various records. This cuts down on unnecessary clicks, which is ultimately a nice time-saver.

Say you are a sales person working on some opportunities this week (you'd like to close them successfully). You are also planning to follow up on a couple of existing customers; trying to obtain references. And you need to check if the payments for last month's orders already arrived. It makes perfect sense to add these specific opportunities, accounts, and orders into your Favorites. This way you don't need to search separately for a handful of records each and every time you need to look up a detail. Favorites make your life just a bit easier.



#118

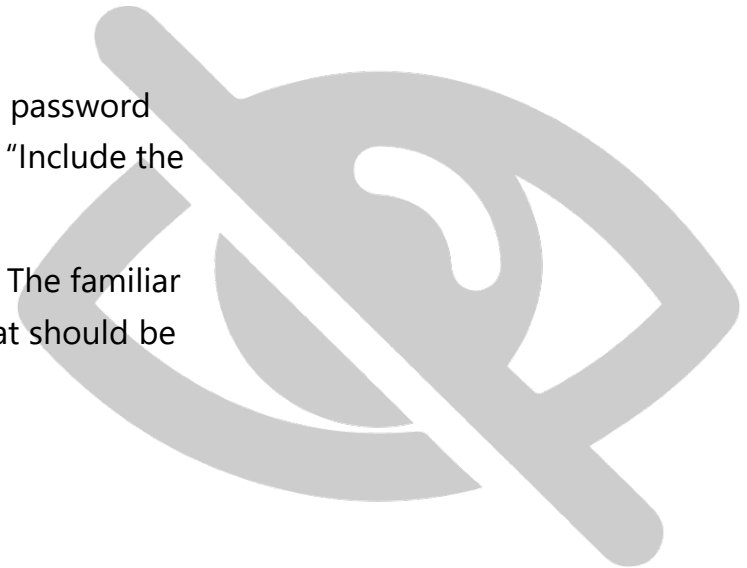
Don't let the people wonder what to type in

We've all been there—filling out a form, trying to figure out what to type into a box, whose label doesn't tell us much (government forms, we're talking to you now).

Don't let your users wonder—give them a helpful hint. In mobile CRM app, you can do so by inserting a placeholder text into a field. A placeholder text indicates a sample value or a short description of expected input so that people know right away what to put in. Either way, it's going to avoid confusion because users won't just wonder what to type in, they will know it with certainty.

You've already encountered it many times, without realizing it. Like a password "Must be at least 6 characters long" and a telephone number should "Include the county code".

The short hint is displayed in the field before the user enters a value. The familiar light gray color makes it easy for everyone to recognize it's a hint that should be replaced with real data.



#119

Use iPhone's Touch ID to access your CRM

Why type in your password to log on to your CRM when you can just use your fingerprint? It's unique and practically impossible to copy. Use iPhone's Touch ID, a fingerprint identity sensor, to access your CRM even faster.

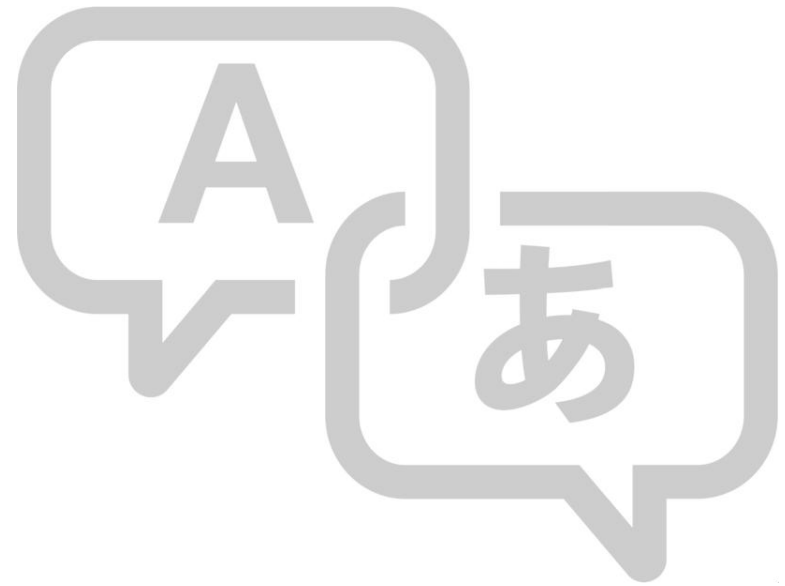


#120

Speak your language

Not digging English? No problemo! Or shall we say: pas de problème, कोई समस्या नहीं, kein Problem, нет проблем, žiadny problém, ei hätää, no hay problema ...

Point being, Resco Mobile CRM speaks your language, whichever that may be. You can choose from default ones or add a new one from your CRM system.



#121

Dead-simple to use

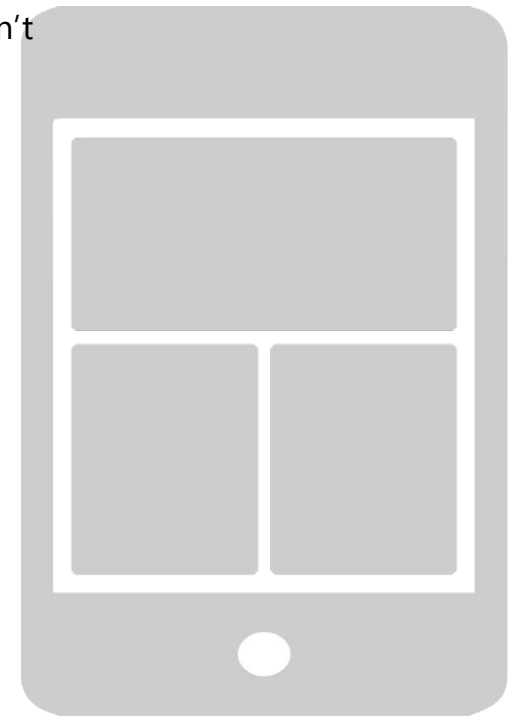
An app has to be easy, intuitive. So users will actually use it. And not frown while doing so. Resco Mobile CRM is touch-friendly (no small buttons anywhere), fast (the response time is off the charts) and intuitive (you just know what to do straight away).



#122

Create your views as you go

Every time you need to filter data relevant to you, you can do it by creating a custom view. If your colleague is on a vacation and you are taking care of his accounts during his absence, you can create a view that lists only his accounts. You don't need to ask your system administrator to create views for you—you can do this all by yourself. Just fill in a few conditions and there you have it. Once you don't need one or the other view anymore, you can simply delete it.

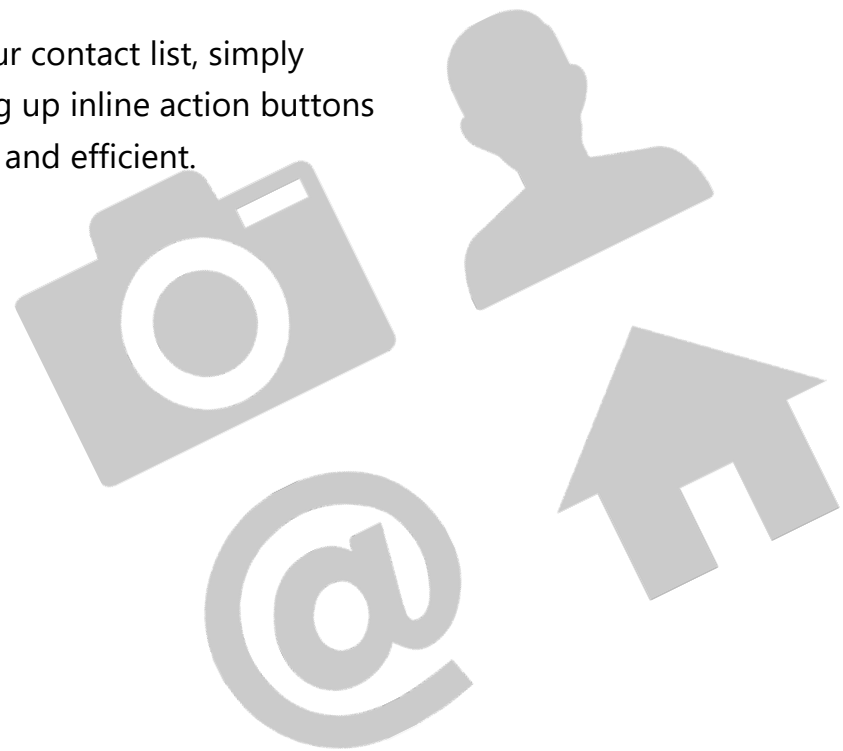


#123

Swipe left to reveal inline action buttons

What do you do when you need to get in touch with somebody? You call or write an e-mail, obviously. But for these actions, you don't have to go to your phone app or open up a mail client. You don't even need to open the contact's record.

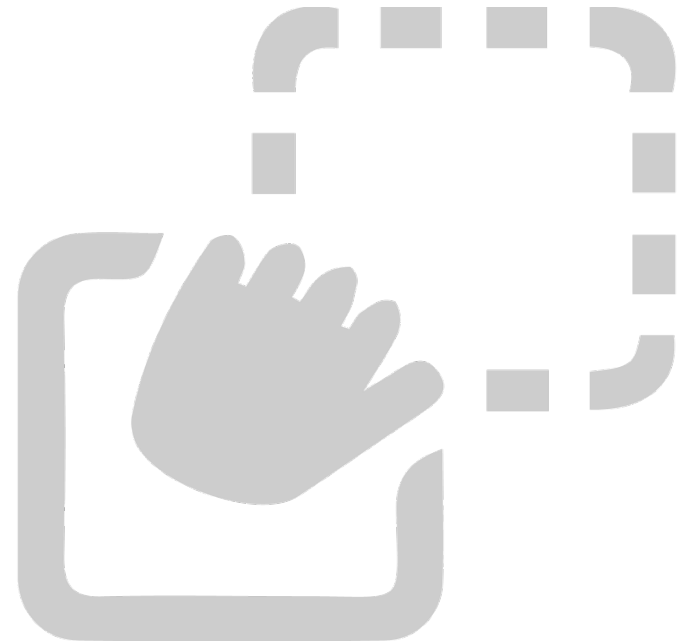
When you have found the person you wish to talk to in your contact list, simply swipe from right to left across his/hers name. This will bring up inline action buttons that let you call or send an e-mail instantly. It's simple, fast and efficient.



#124

Drag & drop to schedule activities

Something came up, and you cannot make it to that sales call you had planned for tomorrow morning? Make sure you don't forget to reschedule. And when you do, you simply move around the appointment in the calendar just by swiping across your screen. You can be jumping from Monday to Friday, from June to December or even between different years literally by moving your finger.



#125

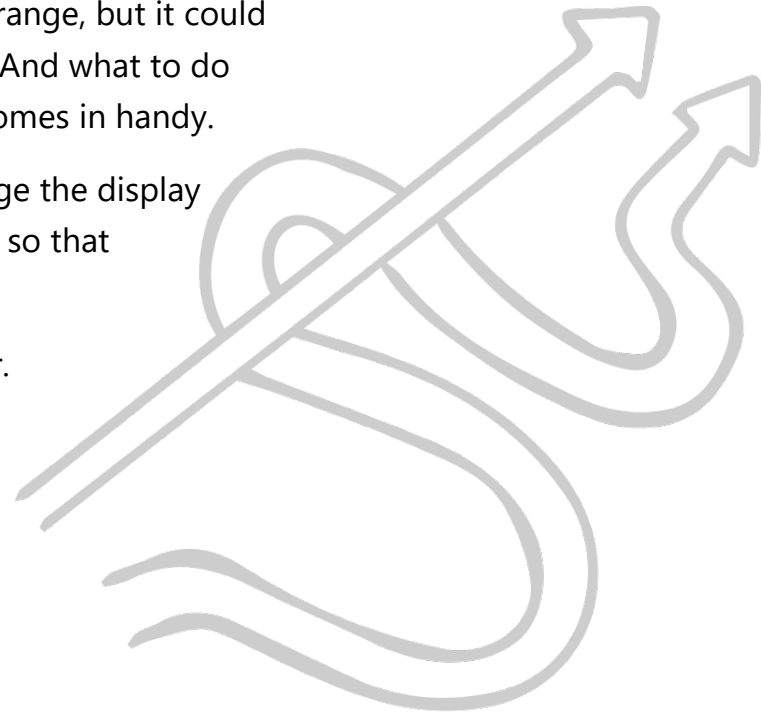
Say it clearly

You know those lengthy display names of fields? Like this one “Final Proposal Ready” or this one “Do Not Allow Bulk E-mails” or “Total Line Item Discount Amount”– there are loads and loads of them.

Well, if you would put them into your mobile CRM app, they'd be cut short because of the small screen size at your disposal. Not only would it look strange, but it could also mean that sometimes you won't be sure which field is which. And what to do with it (how to fill it in). And that's when our localization feature comes in handy.

You can mutate the language of your app, meaning you can change the display name of fields, commands and other elements present in the app, so that everyone will know what each field means.

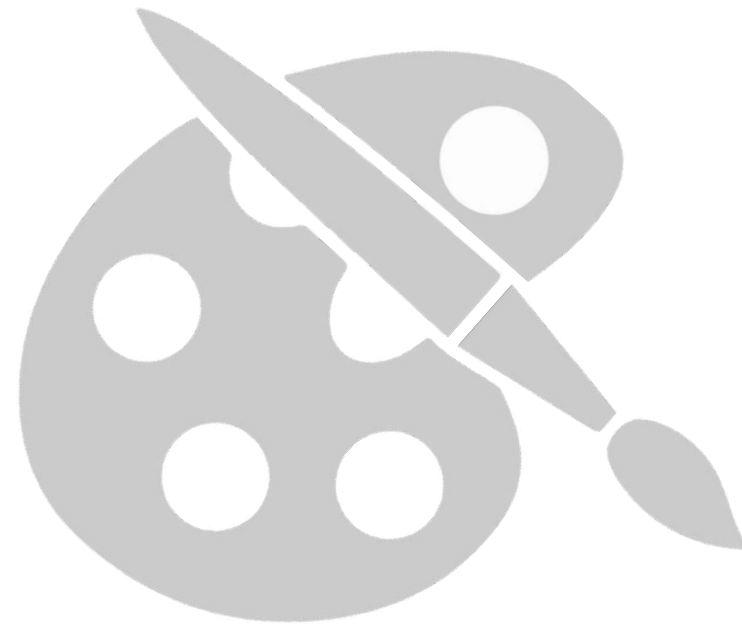
One little change = one (probably more) no-longer-confused user.



#126

Color-code activities in calendar

Give your calendar some clarity and help your users identify activities. You can do so by defining colors for activity types on the calendar. For example: make your Appointments blue and Tasks red. Differentiate tasks with high priority from those of a lower one. Or assign a color to each user of a shared calendar.



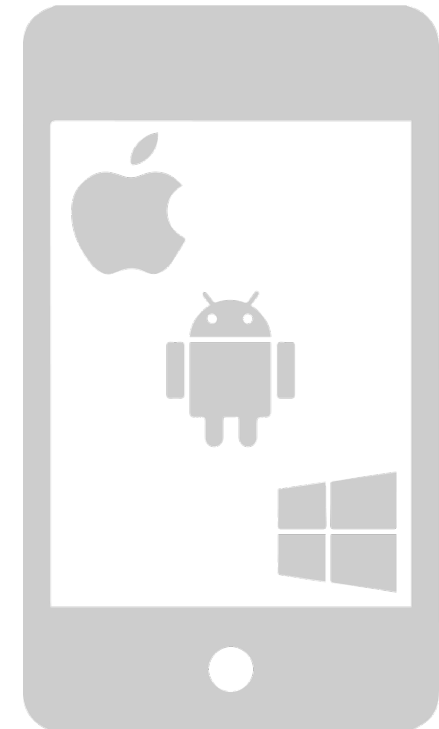
#127

Native apps that let you act on your instincts

In any app, you mainly want to perform a task. But as you're trying to accomplish just that, you don't want to think about how things in the app work and you certainly don't want to be facing something unfamiliar.

A well-designed app needs to allow users to **work intuitively**, to **avoid any confusions and delays**. That's where native user interface immensely helps. All proper definitions aside, native user interface simply means the mobile app looks like and behaves as if it was made for that particular phone or tablet. This includes a number of things such as warning messages, placement of buttons, navigation, transitions and gestures. **All is where it should be, as it should be**. Otherwise, users won't feel quite at home.

"When the warning message looks like something that wants your attention, you'll pay attention to it."



#128

Get a closer look at this

Mobile CRM has to function on a smaller screen. Therefore, each inch of space is a highly valued property. So to make things work well, the app has to be smart about how it uses space. Even small things like minimizing the main menu if you don't need it or enlarging the form to full screen if you're working on a tablet can make a difference in how comfortably you can work.



#129

Have numerous devices, but only one user interface

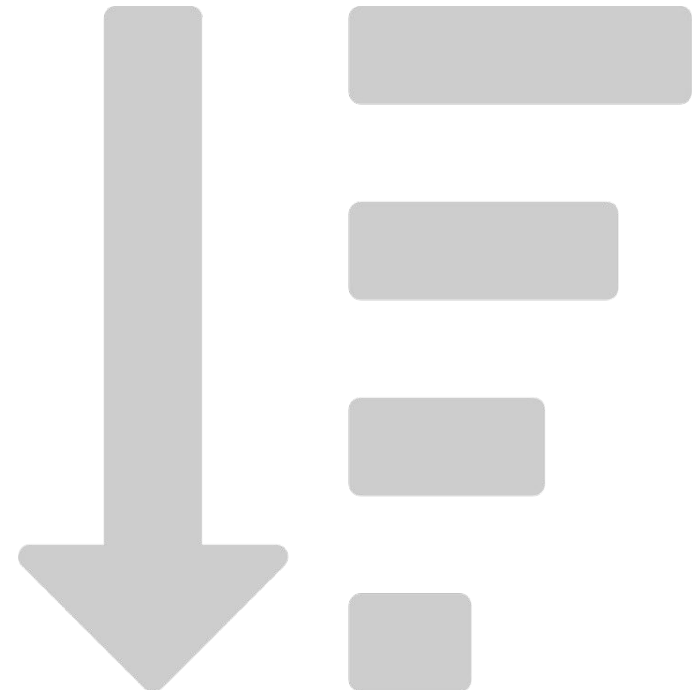
Our native apps are designed from the ground up with consistency in mind. Whatever platform you prefer you will always get the same great user experience. You can work in a familiar environment across a vast array of devices. So on each phone, tablet or PC, you'll know immediately where to go and what to do.



#130

Let's sort this out

Different things are important to different people. If you don't fancy your lists organized alphabetically, you can sort them by priority. Or any other way you like. Flexible sorting options ensure your lists are arranged just the way you need them to be, with the important things on top.



Conclusion

Let come back to the questions we've asked in the beginning.

1. What are the benefits of mobile CRM?
2. Does it pay off to invest in a mobile CRM solution?
3. How can we use a CRM app in our scenario?
4. How can we improve our current mobile solution?
5. What is there to know that I don't know yet?

After reading through this book, you should be able to answer all of these questions with ease.

As you can see, Mobile CRM allows you to take your CRM to a completely new level. It does it all: improves productivity, streamlines processes, engages your customers and helps you do your work with dozens of amazing functionalities.

Mobile CRM is here — all you need to do is take advantage of what it has to offer.