Section 8

Cost effectiveness

#66

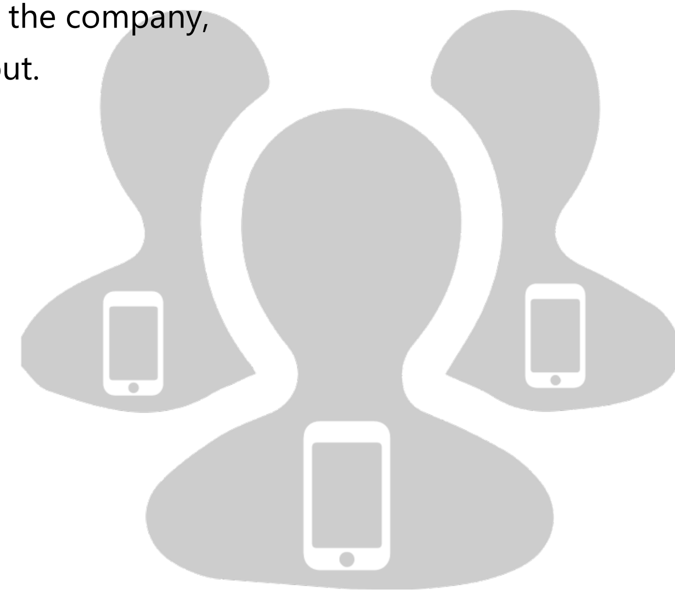
Eliminate the need for a PC altogether

Yes, it is possible to be "just" mobile. When you think of it, some people don't need a PC at all. Like maintenance mechanics or insurance inspectors. The core of their job is to be outside, checking on things and reporting to the back-office. These tasks can be done comfortably on a tablet. If you give them mobile access only, you'll eliminate the costs associated with a PC. And, let's be honest, once they have the tablet in their hands, they'll soon realize that a computer is completely unnecessary and redundant.

#67

Support BYOD

BYOD is huge these days. Employees call for it to catch on everywhere since they prefer using their own devices. But IT departments often fear the business data might get compromised. The middle ground? Smart support of BYOD–a mobile CRM application that allows you to give CRM access to employees even from a personal phone or tablet. But you can keep the privilege to approve them first. If anything unexpected should happen, you also have the option to lock remotely the application and wipe out all data from it. And if the employee leaves the company, you've got a way to remove the data, so nothing confidential leaks out.



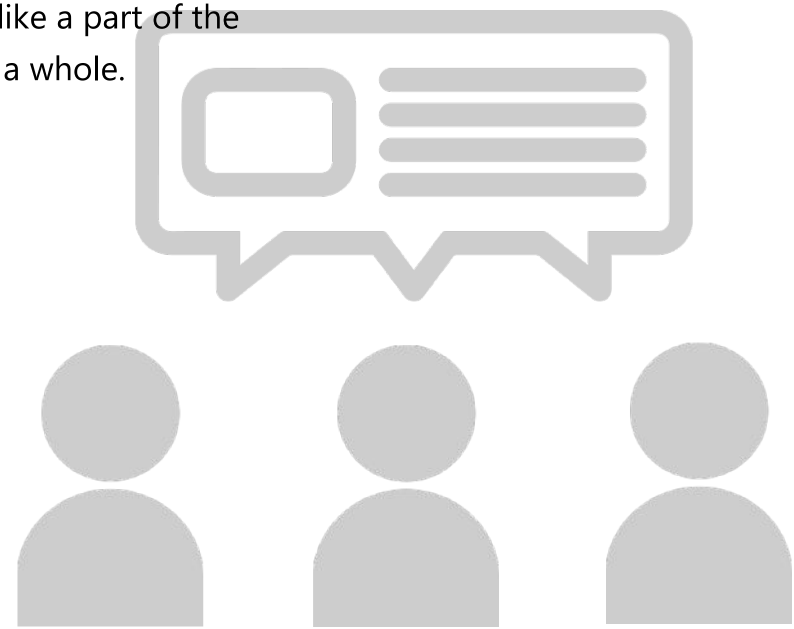
#68

Involve people in the process

Picking a device is already a common practice in most businesses when it comes to phones–employees usually get to choose which one they want with the given monthly plan. You can do the same for your Mobile CRM users.

Make a selection of devices that are apt for your business and give the final word to each person. This approach might just make them lose their initial resentment towards something new. By picking a mobile device, they will feel like a part of the decision and, hence, be positive towards adopting mobile CRM as a whole.

No extra effort on your side. Everyone is happy.



#69

Analyze the app usage to evaluate your investment

Want to see if the investment into Mobile CRM for your employees paid off? If you want to, you can analyze how (and if) they use the app.

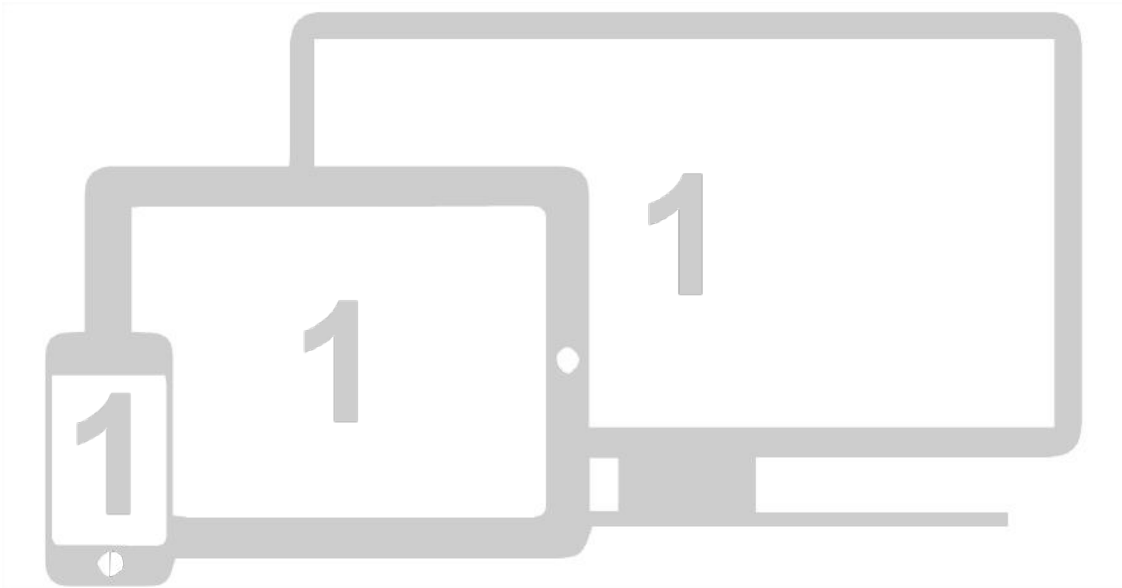
You can capture the time and GPS location whenever a mobile user synchronizes the application, creates, updates, deletes, or works with any record. You can also track the application's state events: that is whether the application is running, paused (put to background), resumed (put back to foreground) or terminated.

All of this will help you understand how field workers use the mobile CRM app and decide whether it's worth investing in the application.

#70

Customize the app only once

Having a mix of different mobile devices in your company? No worries. You can customize the app just once, and all changes will be reflected instantly on all types of mobile devices. This multiplatform approach allows you to cut down on the development time & cost while having the freedom to choose multiple types of mobile devices at once.



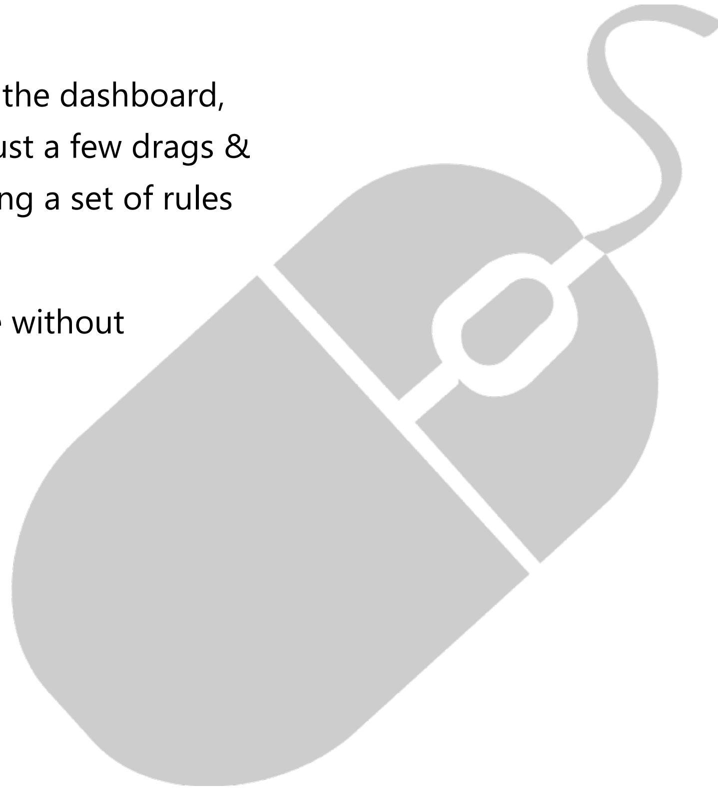
#71

Create your app without any code

Need to customize the mobile CRM application to make it work for you? With the just-clicks-no-code approach, the app can be modified in a few moments without ever needing to touch a piece of code.

Add custom entities and fields, design views and forms, configure the dashboard, create alternate versions for different users and much more with just a few drags & drops. Even a lot of the business logic can be recreated just by using a set of rules instead of custom scripts.

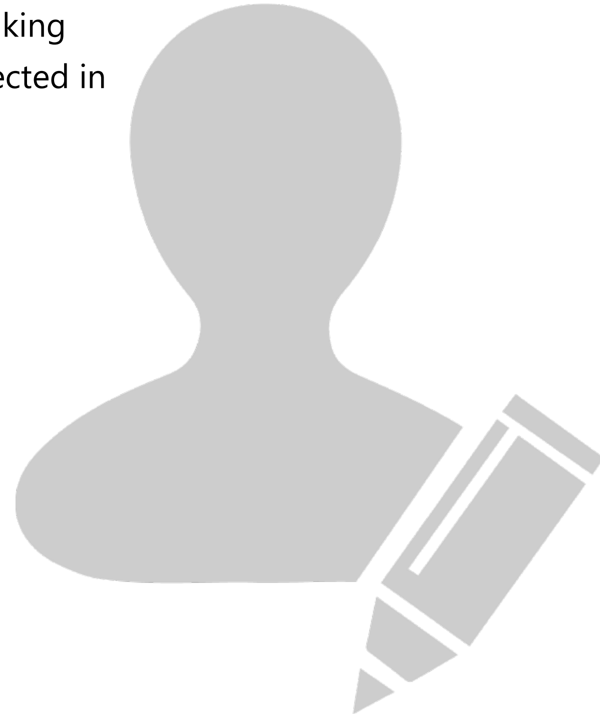
The tools and designers allow for a tailor-made mobile experience without relying on programming to do the heavy lifting.



#72

Make changes to the system as you go

Our developers had this ingenious idea–to create a tool that lets you do changes to the setup of the application without needing to complete a new code and deploy the app to the stores. And so, Woodford was created. When using this free customizing tool, every change of the application can be done and seen in real-time. So smaller or larger alternations of the app are just a matter of you making the change and hitting the publish button. All your work is immediately reflected in the application. The wait is over!



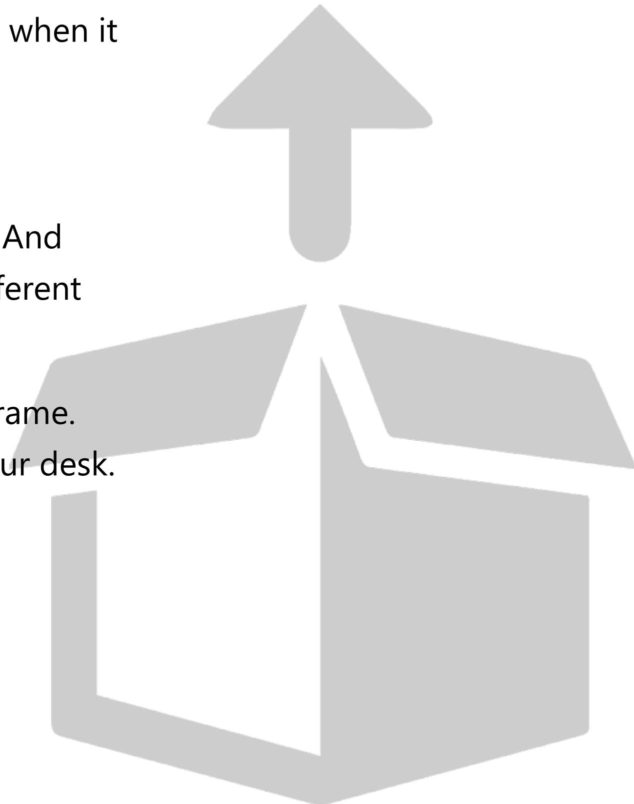
#73

Spare yourself the hustles of custom development

When it comes to the decision of an in-house development versus buying a ready-to-use product, it’s easy to fall into the trap of “We can do it on our own just fine”.

In-house development can be, however, an unfortunate decision, especially when it comes to time—we all know deadlines will be missed. Then there’s also the question of picking the platform and keeping up with its updates, seamless synchronization with the CRM server and adding functionality as you go. Developing your own app is no walk in a park. You’ll face many challenges. And wouldn’t it be better to focus on the business instead of struggling with different platforms, technical details, tricky deployment, and time?

With a ready-to-use solution, you can go mobile in a relatively short time-frame. If you put your mind to it, it can be a matter of weeks to have an app on your desk.



#74

Utilize flexible license assignment

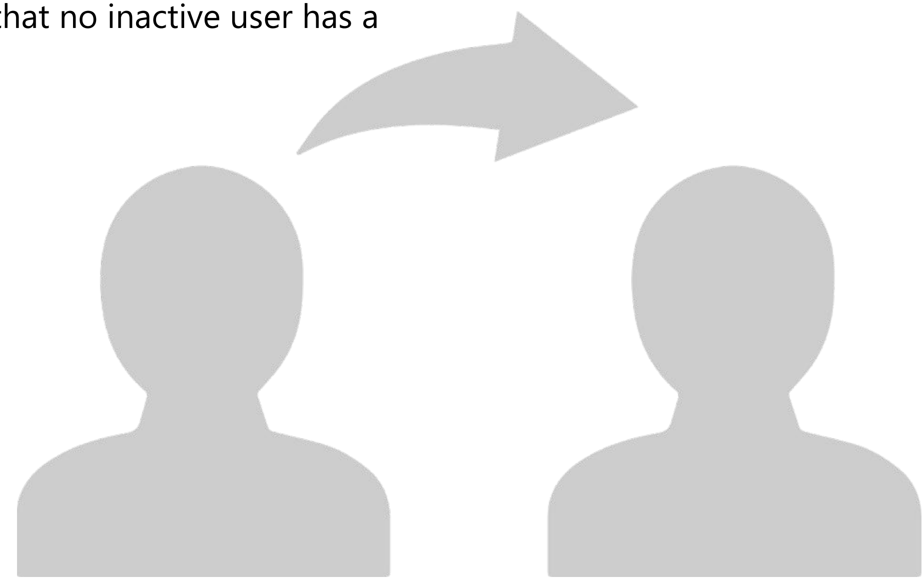
People come and go. They change job roles or leave for maternity leave. Things are never steady in a corporate world. That’s why you need to stay agile also when it comes to your Mobile CRM application. You need to have the option to assign and re-assign user licenses as you please. With Resco’s Mobile CRM, this option is always at your disposal. You don’t need to contact any support team to re-assign a license or painstakingly un-install software from one device in order to use the license on another. Just a few clicks in the administration console on your PC will do. Your users are ready to go in a matter of few seconds.

#75

Free up unused licenses

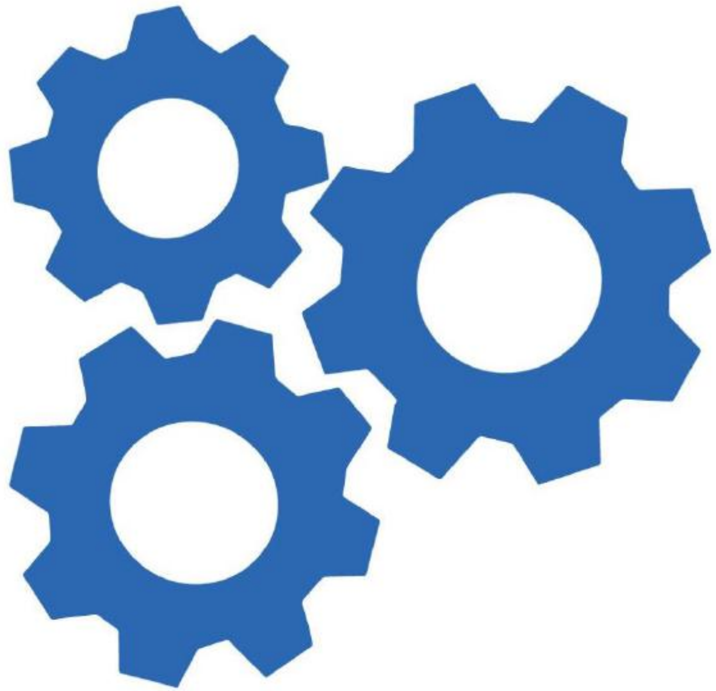
We know it’s not easy to keep track of all employees leaving the organization or changing their job role. Especially when you are responsible for a large group of people—hundreds or thousands of CRM users. Some might just happen to fall through the cracks.

Luckily, the Resco Mobile CRM client will automatically free up licenses that have not been used for 90 days in a row. This will guarantee that no inactive user has a Mobile CRM license you paid for.



Section 9

Efficiency



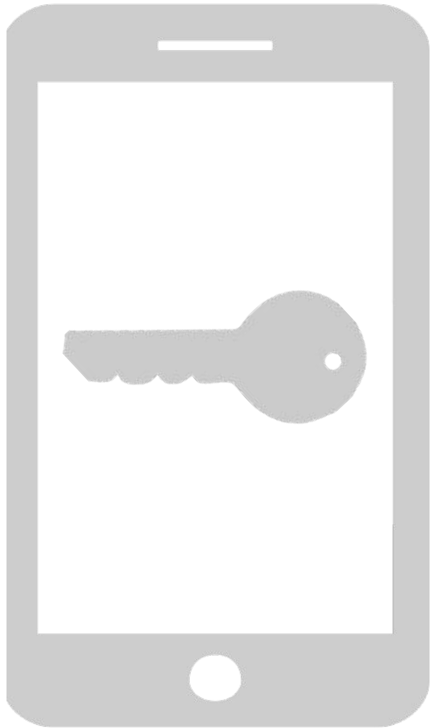
#76

Place & log in your phone calls

Call a contact right then & there from the app (provided you have the phone number). Save it afterward as a CRM activity and you won't lose track. You can also use Skype or Facetime to make calls.

Once you finish the call, you'll see a new activity in your CRM app. It has already mapped the call to the person you were talking to—all you need to do is type in a short note (if you want to) and hit save. The call will be automatically tracked, so you can come back to it whenever needed.

Phones running on Android also offer the option to track incoming calls—these will appear as a list of calls in the application, so you can pick and choose which is business-related and shall be stored in the CRM system as a phone call activity.



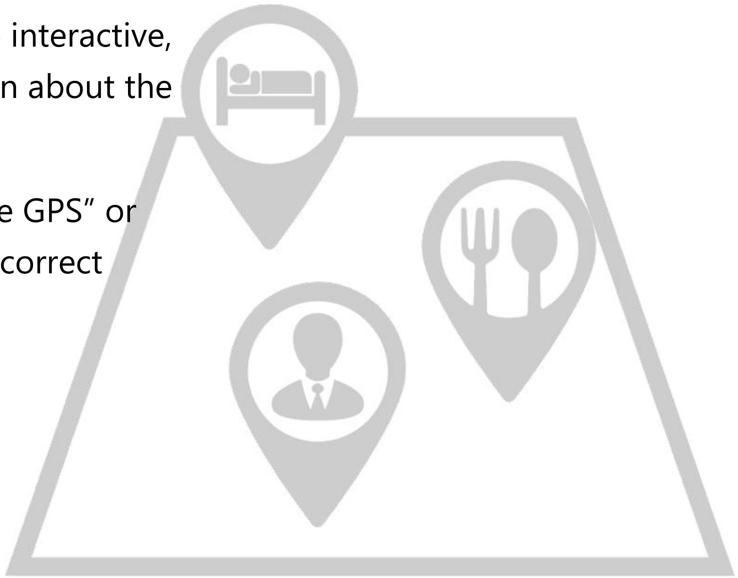
#77

Interactive map at your command

Online maps have already become a common part of our lives. When we look for an address, restaurant, hotel or another point of interest, we use Google or Bing maps to find that place and a way how to get there. But how about using this functionality in a CRM mobile client?

Resco Mobile CRM provides an interactive map as an alternative view of accounts, contacts, leads or any other records. You can zoom in, zoom out, filter and search within the map. Each record is represented by a pin. These little pins are interactive, which basically means you can tap on each one to get to the information about the record, such as the contact details, notes, planned activities and more.

And if you find that the record is not where it should be, tap the “update GPS” or “update address” button once you are at the venue and it will store the correct location for future use.

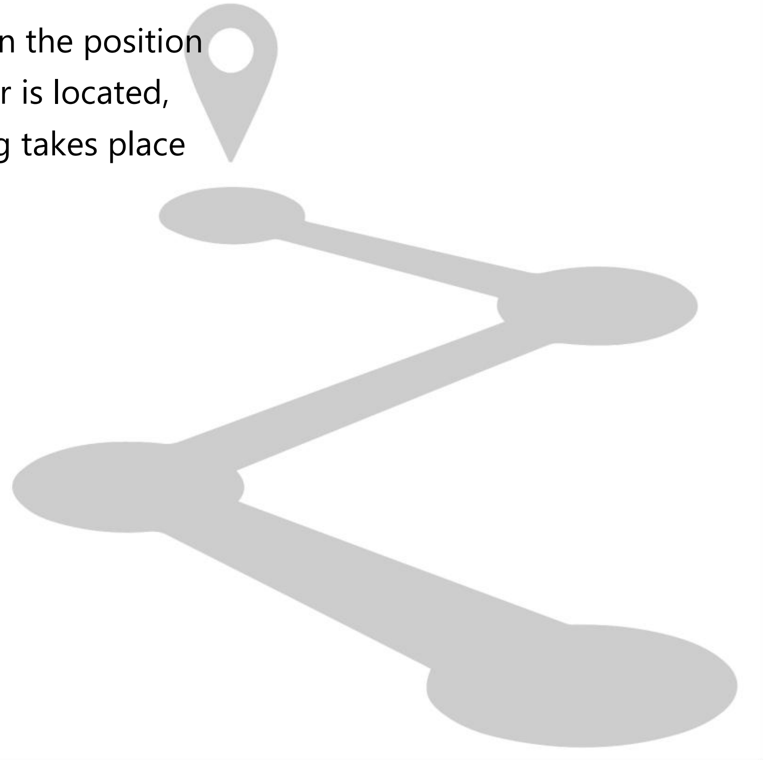


#78

Display activities on a map

It’s the classic story: A map meets an entity, the entity has the GPS coordinates, so the map displays its records. But what happens, when the entity does not have the GPS coordinates? For example appointments. No happy end? Not necessarily.

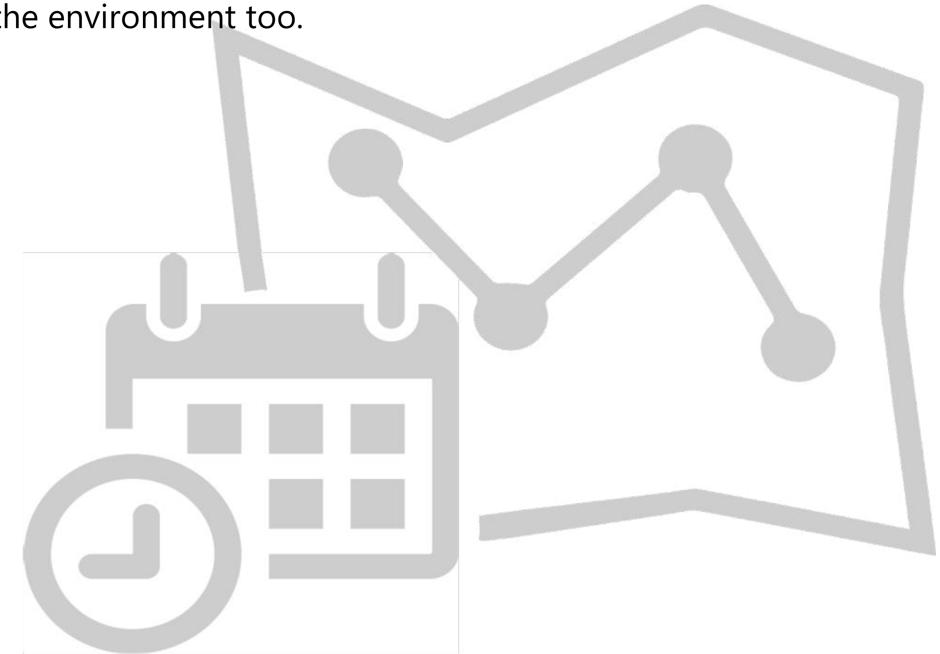
In Resco Mobile CRM app, you can display records on a map based on the position of their parent records. So it’s sufficient you know where the customer is located, instead of having to put in the location coordinates when the meeting takes place at their office.



#79

Plan your activities for the day on a map

Whenever planning for a day full of customer visits, it's easier to do the planning with the use of the map. The map can display not only records that have an address, but also those that don't have one per se. The only thing you need to have is a parent record that does have a location—meaning that activities, such as customer visits or service cases can nicely pop up on a map as a route planned to make efficient use to your time, but also gas. Good for the environment too.



#80

Get 1-click access to your activities

The calendar and a map give you 1-click access to the details about each activity. You don't need to switch between multiple tools to find out when & where your next meeting takes place and what are you going to discuss. It's right there! All you need to know in a single place at your fingertips.

#81

Schedule your days and weeks

Scheduling and managing a workday or a workweek is one of the primary roles of a mobile business tool. Mobile CRM application will encompass all of your appointments, tasks, and other activities, so you'll be able to organize your schedule to get the most out of your working hours every day.

If anything changes, you can just drag and drop an appointment to re-schedule it. You can also use multiple calendars: Why just have one if you can have two or more? It's great if you want to separate your own appointments from, let's say, your team's appointments.

To gain even more clarity, you can get rid of certain days and hours. For instance, Saturdays and Sundays can be off duty on your calendar, so will the hours before 8 a.m. And if your business has trainees or other temporary workers, you can give them access to only those days/weeks/months that apply to the time of their assignment with the company.

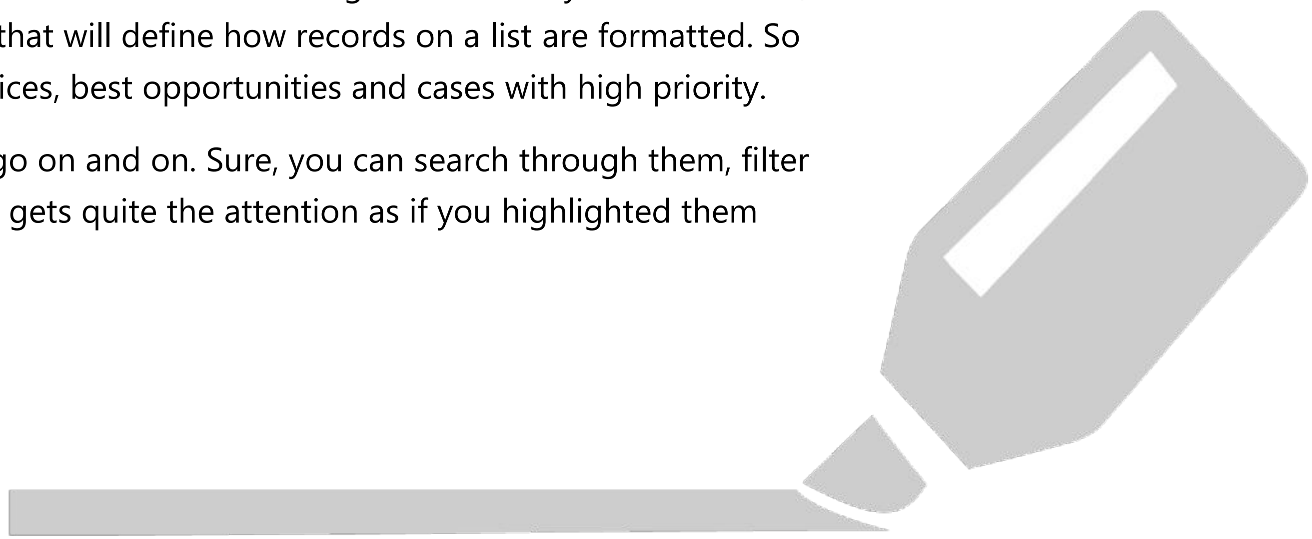
#82

Make those records stand out

Remember when you were in school, and you used a fluorescent yellow highlighter to pinpoint the things you wanted to remember for the test? When you went through your notes later on, you just skimmed the text and focused only on brightly colored chunks. It was easier to do it this way.

You can apply the same principle to your mobile CRM. Make it easy for users to see what needs their attention. Highlight important records in your Mobile CRM to make them stand out. Just like conditional formatting known mostly from MS Excel, you can set up a set of rules that will define how records on a list are formatted. So highlight those overdue invoices, best opportunities and cases with high priority.

"The lists of records in CRM go on and on. Sure, you can search through them, filter them, sort them, but nothing gets quite the attention as if you highlighted them with colors."



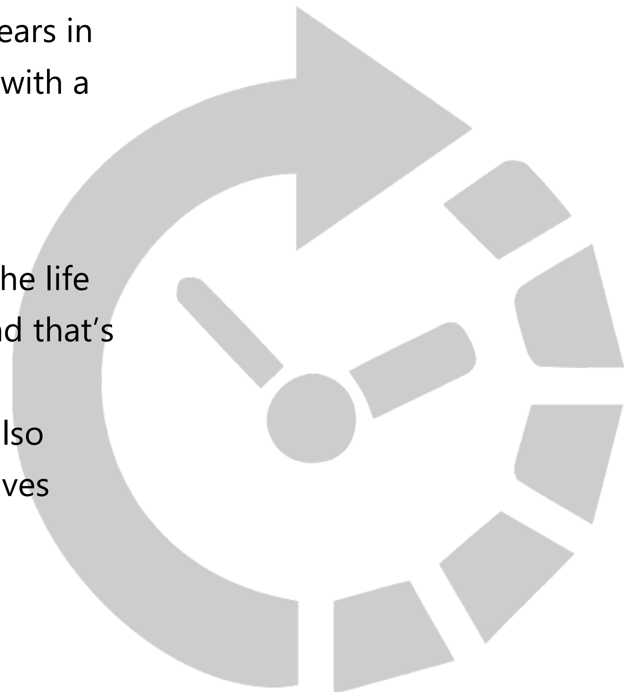
#83

Shorten your product delivery cycle

A typical order process usually looks something like this: A sales rep closes a sale with the customer. Soon (or later) after, the sales rep sends the order to the customer to get it signed. The customer sends the order back. The order is signed or send back for some alternations. The sales rep then puts the order into CRM. This could take anywhere from a few hours to a few days (if the sales rep waits for the end of the week to complete his administrative tasks). The order appears in CRM and is ready to be processed. Company ships the order or places it with a vendor and the product finds its way to the customer.

This can be made so much easier.

With an instant gathering of orders from field workers, you can shorten the life cycles of orders and get the product to the customer faster than ever. And that's not all. Creating orders via a Mobile CRM application also contributes to better accuracy (by eliminating manual data input into CRM, you are also eliminating human mistakes) and improved cash flow (a product that arrives sooner at the customer's site can also be billed and paid for sooner).



#84

Save contacts without copying them

It seems to happen way too often—you want to call or email someone, but you can't seem to find this person anywhere in the CRM database. Then it hits you. Their contact details never made it from your personal address book into CRM. Luckily, with Mobile CRM, you can import and match the contacts from the address book on your phone with those on your Greentree CRM server with a single tap.

Forget the tedious manual typing of contact information from your phone's address book to the CRM. Instead import them via the app. And, if the number or the e-mail address of a phone contact and an existing CRM contact match, you can merge the two, so there won't be any duplicates.

After all, who has time for the administration when you've got bigger fish to fry?

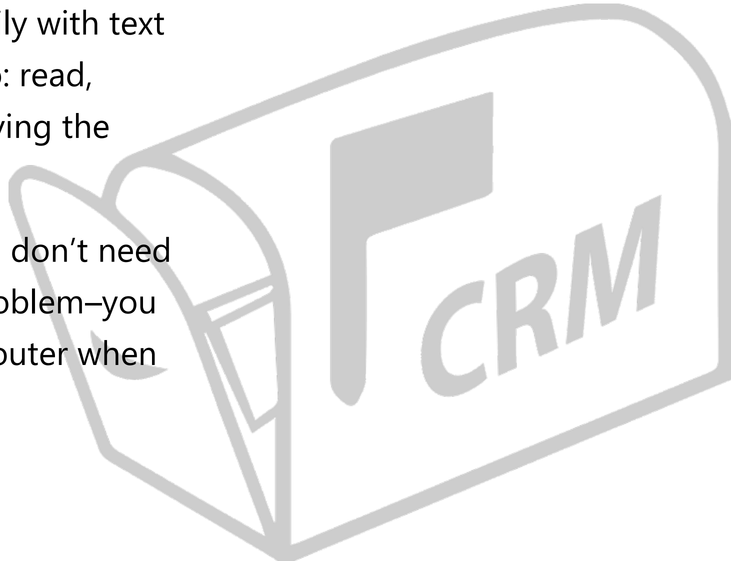
#85

Fuse emails and CRM

An email is one of the most popular ways of business communication—it allows you to attach a picture, video, quote, invoice, call/meeting invitations, etc. Compared to other forms of communication, it also stores the information for future use. So if there is ever a need, you can use it as a proof, reference or reminder.

A good Mobile CRM app must also be a perfect email client. Otherwise, salesmen and other professionals would need to switch constantly between Outlook (or another email client) and CRM app. Our goal is to allow you to work easily with text or HTML emails within the app. To do everything you would normally do: read, create a new one, reply, forward, work with attachments…all without leaving the Mobile CRM app.

You can synchronize your Exchange contacts and selected folders (if you don't need your entire inbox) with the app. Are you using multiple clients? Not a problem–you can pick whether you will be using Exchange, Gmail or Greentree CRM router when sending e-mails from the app.



#86

Let us remind you…

Your app will notify you of your upcoming meetings, tasks, and other activities. You can select which events or records should trigger alerts at a certain time. So your chances of forgetting vanish. Or drastically decrease at least.

#87

Store only what you need

The offline capability of the application keeps the data stored in the local database of your phone and tablet. Hence, the data loading is fast and presents no problem in case the Internet connection is lost. The capacity of the storage on a phone or tablet cannot be compared to that of the CRM server. Therefore, for an offline scenario, you need to get smart. Or your Mobile CRM needs to.

Synchronization filters are usually the tools of choice to limit a number of records downloaded to a mobile device. By setting up these filters, you define which data to keep. For example, you might need only opportunities that were created within the last 120 days or leads that are yours or unassigned. So set up filters that will dictate what data makes it into the limited storage space of your device.

#88

Import your custom icons for faster navigation

Replace the icons in the app with those your users are already used to seeing. You'll make it easier for them to navigate–visually. Plus, you have the opportunity to make the app look more like it was built just for you.

Are you in the dark on how to do it? Don't worry; it's so easy, you'll be done by the time your coffee cools down to a drinking temperature.

Section 10

Multimedia

#89

View, add, edit & email attachments

Have product sheets, contracts or other documentation with you at all times. You can add PDFs, MS Office files, pictures, videos and HTML attachments to your records. You can also insert attachments from one note to another or even attach files from an external application, such as your email client. And, you can also email an attachment to a client.

#90

Integrate Gmail & Exchange

Resco Mobile CRM also lets you handle and track your e-mail communication when using Gmail. There's no need to leave the app to see what was already said and done or when you need to respond to that client's inquiry fast.

The same goes for Microsoft Exchange. Access your Exchange inbox within the mobile CRM client. Not only you can receive, view and send messages, but all of them can be tracked automatically in your CRM.

#91

Searching made easy

You can search for records within the application by using the search bar at the top of each view. The app lets you optimize the search to your preference as you can choose to use any fields to find what you’re looking for. Whether you want to search by contact name, company address or record owner.

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

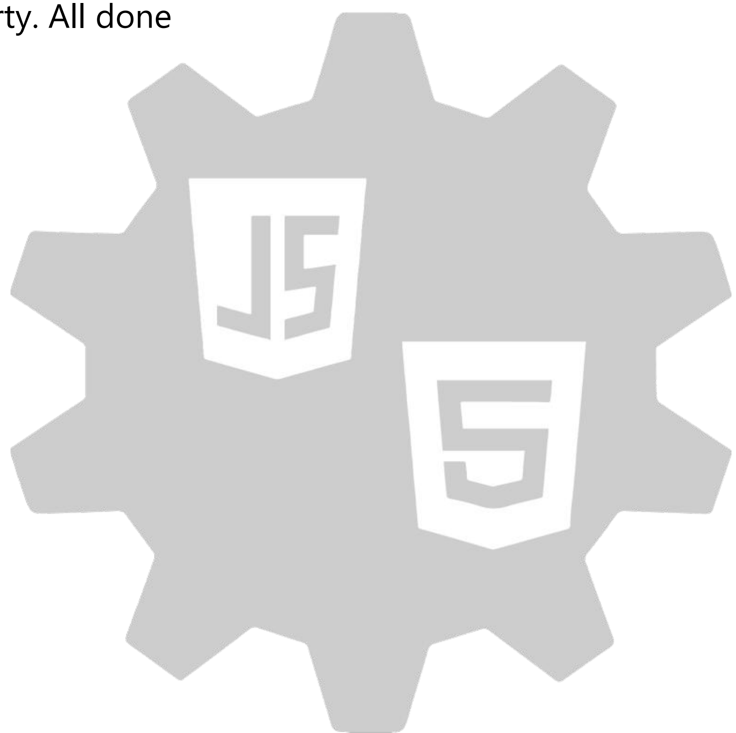
What’s more, users can search for records not only via text fields (e.g. contact name or email), but also by using a status field or a pick list (e.g. filter out hot opportunities when typing in “hot” or accounts that are identified to be manufacturers in the industry type).

#92

Customize the app with JavaScript and HTML

The JavaScript Bridge allows you to create an HTML page that interacts with the Mobile CRM application. That means you can create/modify/delete records, access the data layer, configuration, metadata, GPS position, etc.

For instance, a custom calculator accesses the price of a house (which is stored in CRM) and calculates the mortgage payment for the chosen property. All done within your CRM.



#93

Access your Dropbox files

If you're using Dropbox file hosting service for storing docs, photos, videos and other files, you can associate them with your CRM records and access them offline directly in the Resco Mobile CRM app. It's an easy way to move multiple data files between Dropbox and Greentree CRM, allowing you to share them instantly with your team and other CRM users in your company.

CRM users can access the Dropbox files anytime in their mobile devices, keep them organized, update them by synchronizing the latest content & collaborate with other team members to work more effectively.

#94

Make use of SharePoint

All SharePoint enthusiasts, brace yourself. Documents stored on your SharePoint can be accessed through the mobile app in an offline mode. You can modify them as well as upload new ones.

Since the storage capacity of phones and tablets is limited, you can set up filters to define which documents will be stored offline (for example only those from last month) or become downloadable on demand.

#95

Connect to Google Drive

Working with documents is an integral part of the CRM workflow. Whether it is to show product presentations to customers, or utilizing service manuals and knowledge base, having access to documents is crucial. That's why Resco Mobile CRM also supports Google Drive, an online locker for files and folders with generous storage allowance, compatibility with Google Docs and the ability to open files from 30 software types.

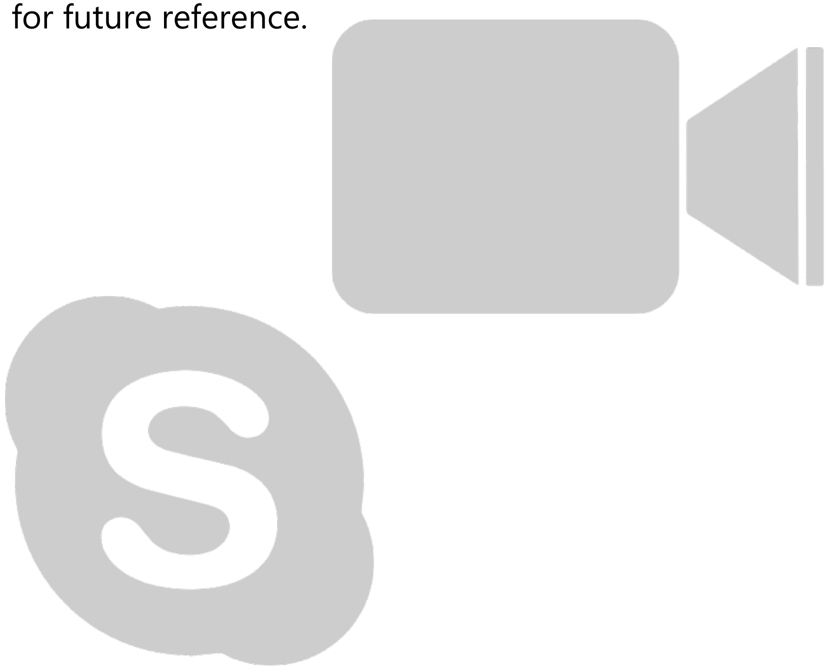
Mobile CRM allows you to play and record multimedia, work with PDF and Office documents and store them in Google Drive.

#96

Use Skype to talk face-to-face with clients

Sometimes nothing's better than a good old-fashioned face-to-face conversation. With integrated Skype and FaceTime calls, you can sit down for a chat with prospects, customers or partners instantly. Even if you're a thousand miles apart.

The best part? Every call can be logged into your CRM system for future reference.

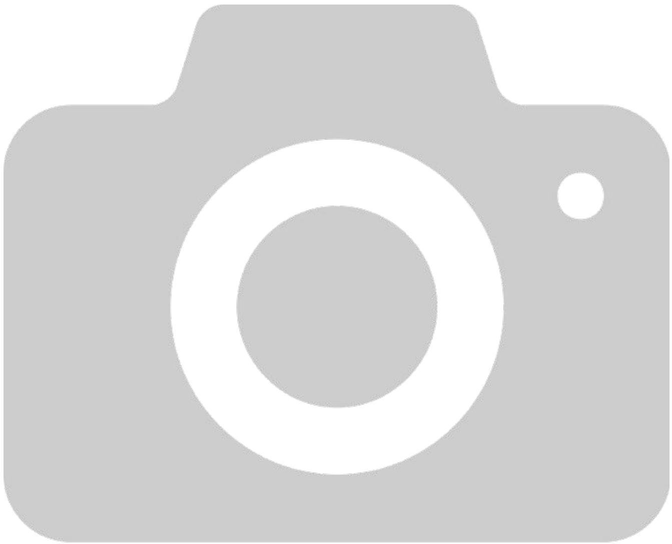


#97

Snap a picture

Got a built-in camera? Put it to good use. Take pictures of your product displays, or of that diagram your prospect has drawn during the last meeting. After all, why should you carry loads of papers with you?

Imagine a media agency that takes photos of their outdoor advertisement such as billboards, light boxes or bus ads and sends them to a client as a part of their report. They can also keep the files for internal usage for future reference. All easy to find within one database.



#98

Resize pictures to save space

Change the size of your images, so they don't take up too much space. Image resizing will allow you to downscale your image, which effectively lowers the size of the image. This simple functionality can save you storage space and a lot of Internet traffic.

#99

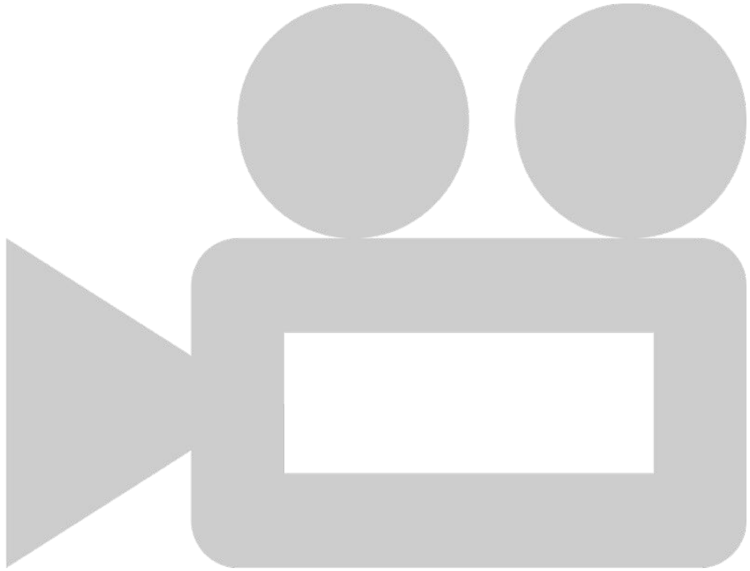
Capture audio

Don’t you sometimes wish you had an audio recording from a meeting to get back to what exactly has been said? With a mobile CRM app, you can record audio with your phone and tablet and save it as an attachment to a record. Instead of writing notes during a meeting, you can focus on the conversation completely. You’ll be able to press play and listen to it all over again.

#100

Record videos

A picture is worth a thousand words. Then what about a video? Enrich your CRM records attaching video recordings that you store on the server, in SharePoint, Dropbox or Google Drive. Shot and recorded with your device, directly accessible within the mobile CRM client.



#101

Register event attendees with a QR code

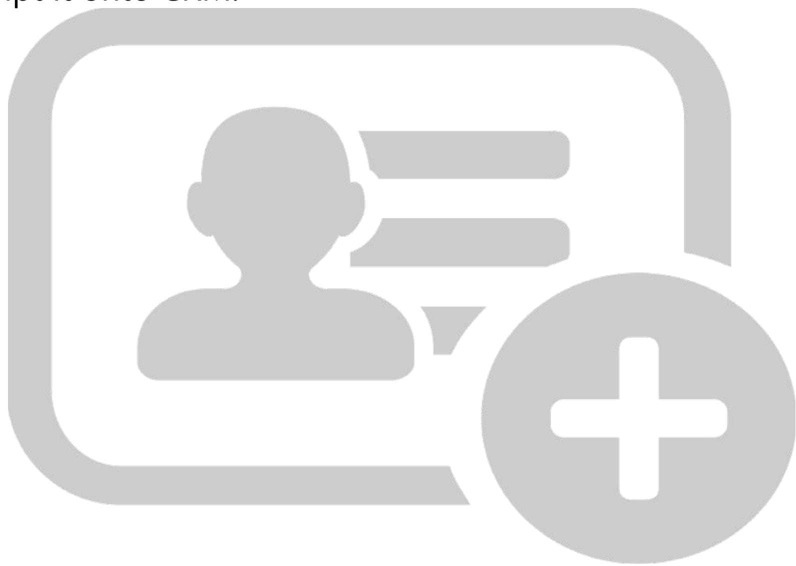
If you want to register people for your event quickly, there’s nothing quite as fast and simple as a QR code. During the event, you can simply scan their tickets with a Mobile CRM app to check people into the event or scan their badges to note down who attended which session.

#102

Scan business cards to create new contacts

Don’t just save the environment with electronic business cards. Save your time as well. Turn any vCard and meCard into a CRM lead, account or contact instantly. Copy them from your e-mail or scan their QR code, eliminating tedious manual transcription.

You can also use CamCard to capture standard business cards that contain only text—the app will “read” the information on the card and transcript it onto CRM.



#103

Use Iframes as you please

A full-fledged HTML website directly in your mobile CRM client? Why not? Use Iframes to access customers’ websites, your intranet, or get the scoop on your prospects by quickly looking at their online presence. An Iframe can do a lot, with minimal demands on your development resources.

#104

Speed up the work with the media tab

This special kind of tab gives you a direct path to selected media. It optimizes work. Sounds boring? It isn’t! For instance, if you take a picture during every on-site visit, you can add 'capture picture' tab to your appointments. This way you don’t need to click through the notes to find the option to take a photo. Eventually, you end up cutting down on redundant, time-consuming clicks.