Section 4

# Engagement

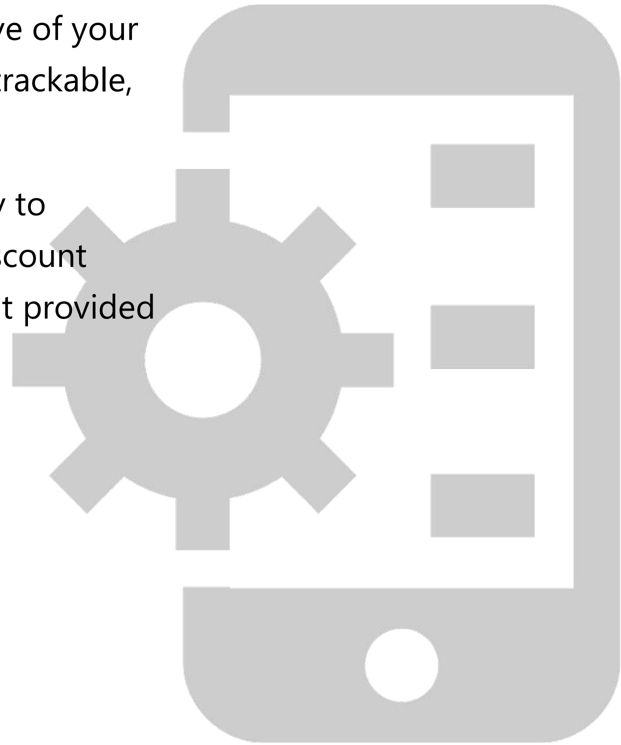
# #30

## Provide added value to customers

A Greentree CRM application doesn’t have to be for employees only. Resco Mobile
CRM gives you also the option to create a mobile application for non-CRM users, such as your customers, agents, business partners or volunteers..

Remember when in 2009 Starbucks introduced its app? With a single wave of your phone, you pay for your latte and collect loyalty points. Those are easily trackable, and the app even notifies you when new rewards become available.

Numerous businesses have since followed suit. An app is an effective way to provide your customers with added value. Whether it means a unique discount offering or a supermarket app that improves users’ social life—the benefit provided to users can be virtually anything.



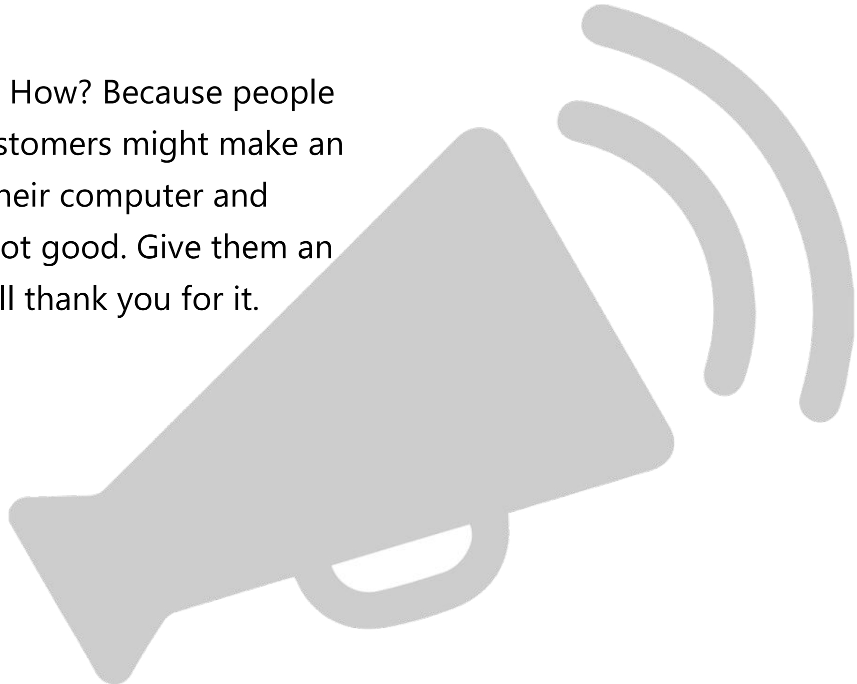
# #31

## Promote products

I need to have a 'sexy' product for people to want to download my app.

Yes, it certainly is easy to imagine what your consumer app would look like, if your company is selling beer, cosmetics or weight-loss programs. But it's much harder if you are a manufacturer of pet food, a financial consultancy company or a provider of security services. What gives?

Usefulness! Usefulness beats sexy in a mobile CRM scenario. How? Because people will want an app that makes a tedious process easy. Your customers might make an order via your portal, but for that, they have to sit down at their computer and painstakingly fill it in from an already filled in paper sheet. Not good. Give them an app, so they can do it from their phone as they go and they'll thank you for it.



# #32

## Strengthen engagement with your customers

An app is an ideal platform to communicate with your audience. Interact via a public wall or private chat. Showcase your products or respond to any issue immediately. And utilizing push notifications is an elegant way to let users know there is something new worth checking out. Furthermore, the app can be also the starting point for the user community to connect not only with your business, but with each other as well.

# #33

## Build brand awareness

An average American spends 162 minutes a day on his/hers mobile device based on the study conducted by mobile measurement and advertising platform Flurry. Competing even with the time spent watching TV. Although your app might not be used all that time, the user still has to unlock, scroll and look through his phone or tablet to find the one he's currently looking for. And as we know, our brain subconsciously records all the visuals it comes across. From icon to a user interface, a well-designed app that packs the features your clients love boosts your business' recognition.

# #34

## Stand out from the crowd

Many businesses still don’t have their own app. Offering one is still a way to differentiate yourself from the others. Combined with a unique added value and a wider exposure for your products and services, it can make the difference that gets you the deal you’re after.

# #35

## Let your true colors shine through

You can change the graphical appearance of your app as you please. It’s your golden opportunity to create an app that reflects your brand identity or personal color preference.

Why would you want to brand your app?

The app can mirror your corporate branding, your identity to ensure consistency. It can also help user adoption by providing them with something that looks great and feels familiar. And, as a bonus, your marketing department will be thrilled.

## Section 5

# Accuracy

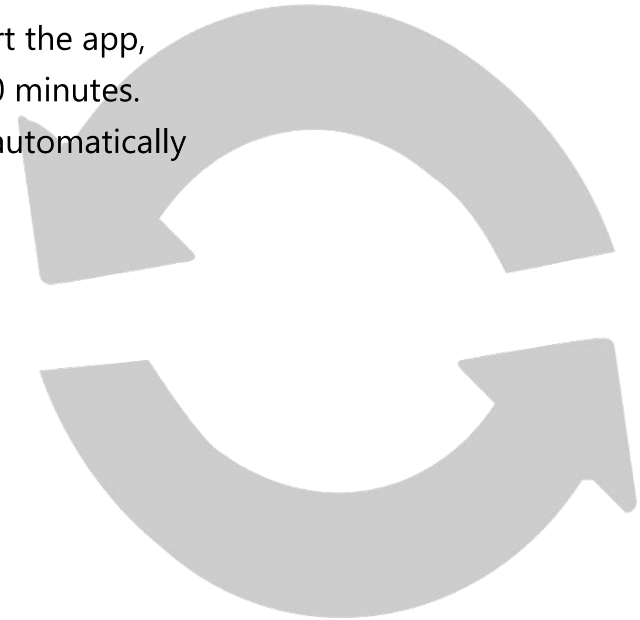
# #36

## Preserve your work as you go

Working on a mobile phone or a tablet is convenient, yet there's still the lingering feeling of: "What if something goes wrong and I lose the data I have saved?"

If you want to take your mind off the manual synchronization between the application and the server, turn on the automatic synchronization that runs in the background—you won't even know it's there.

Automatic synchronization in Resco Mobile CRM kicks in when you start the app, when you change the data, or after a defined period—let's say every 10 minutes. You don't need to think about synchronizing anymore; it can be done automatically for you.



# #37

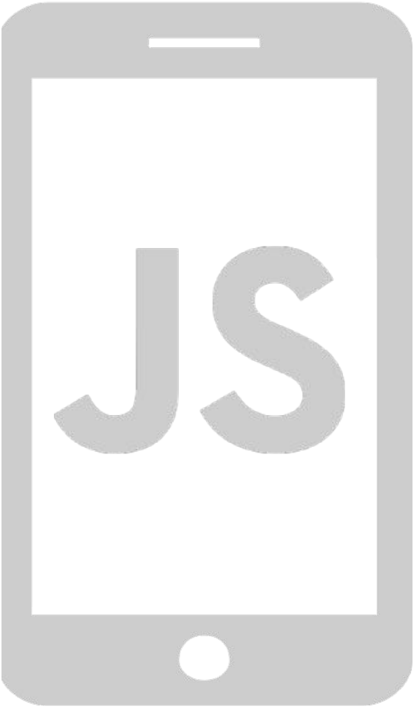
## Ease your mind during data transfer

Worried about losing your data during the process of synchronizing it with the server? After all, who can guarantee that the Internet connection will remain stable or that some other gnome won't get in the way? To address these concerns, precautions have been made. These synchronization precautions would not close an opportunity, quote, sales order or invoice if details were not synced successfully.

# #38

## Run JavaScript in the mobile app

Enhance your Mobile CRM application utilizing JavaScript. Use it to set up forms that dynamically react to user actions, validate input or do advanced calculations. Run your code in the mobile app whether you’re online of offline.



# #39

## Sign here, please.

Picture this: You receive a package, and the delivery guy asks you to sign for the delivery at the door. Not an unusual situation.

Now picture this working for a company that uses Mobile CRM: Its service employees install electric garage doors for a new customer. Everything looks OK and the satisfied customer verifies this with a signature—on the tablet one of the service guys carries around. The company gets and echo of yet another installation completed on time and can save the documentation for later use. And, if anything occurs, the signature can be used as a proof of approved installation.

# #40

## Verify it with your signature

A very common scenario for a mobile CRM usage is inspections. Employees go in, take a look at what needs to be verified and then fill in the inspection form.

Let’s say you are a car insurance agent that visits a client who claims to have damaged headlights after a crash. You inspect the vehicle and answer ‘yes’ to the question “Is the car damaged?”. Immediately a new window appears, asking you to snap a picture of the damage. As you send the report to the back-office for processing, the app asks for your signature to confirm that you have verified the client’s claim. Everything is streamlined and easy to follow.

# #41

## Switch to paperless inspections

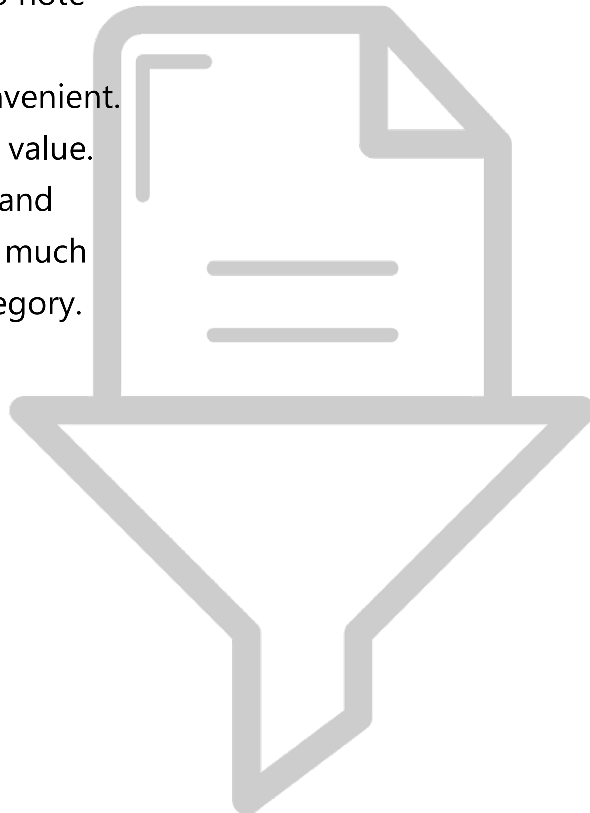
Give your inspectors a handy gadget. Whether they do preventative or damage inspections, they can easily perform their inspections on sites without needing to carry tons of papers.

Not only will they get updated on each new inspection on their to-do list, they can also easily navigate to the site, fill in checklists, capture photos of the current condition, save their GPS position as a proof of actually being on site, verify the outcomes with signatures and get the final report to the back-office in a matter of minutes.

# #42

## Simplify your search with filtered lists

Let’s assume your company sells a lot of products, each in one of the 3 main categories: Detergents, Cosmetics & Baby Care. And your sales reps want to note down which product each customer is interested in as they update their opportunities. But selecting a product from dozens on the list is quite inconvenient. Instead, you can create a list that progressively changes based on a specific value. In your case, you will first ask the user first to select a category of products and then the product itself. Once the customer chooses Detergents, it becomes much easier to search through a much shorter list of products within this one category.



# #43

## Avoid duplicates

Having a Mobile CRM client does not mean your data will be all over the place, duplicating itself and causing headaches. The purpose of the duplicate detection is to discover duplicate records, such as Accounts using the same name or Contacts using the same e-mail address. The duplicate detection rules are to be set on the CRM server and your Mobile CRM application can make use of the server rules.

Whenever an entity record is saved, this record is compared against existing records to find possible matches. If there are any, MobileCRM application displays a warning and the user is given a chance to edit the data.

Section 6

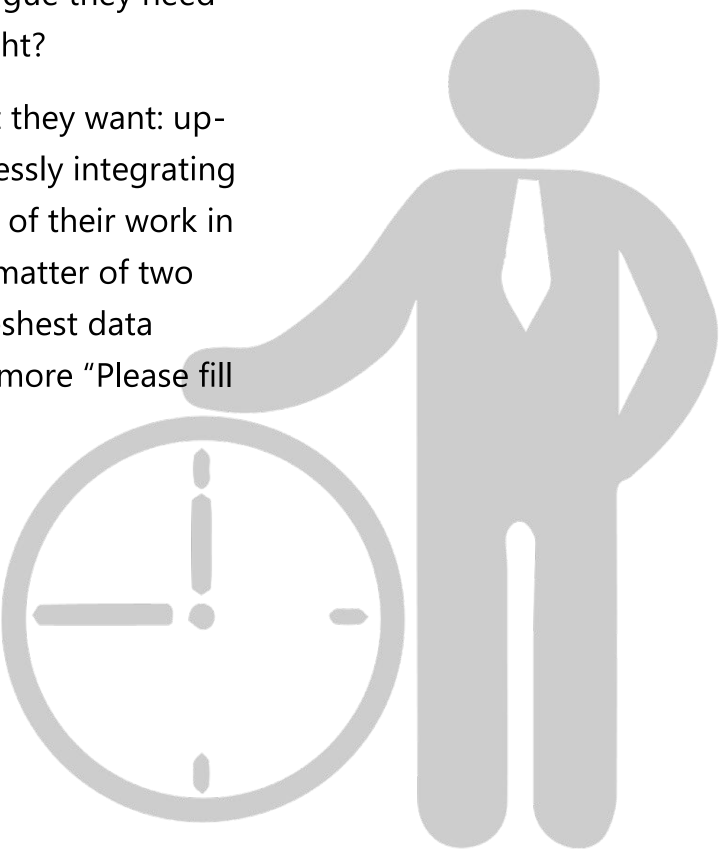
# Insight

# #44

## Up-to-date data for management

It’s a constant battle: Management wants their sales reps to put in the data into CRM, so they can make assessments and forecasts and sales reps argue they need to focus on selling, instead of data administrations. Who’s in the right?

They both are. And Mobile CRM can help both parties achieve what they want: up-to-date data in CRM and time for sales pitches. It does so by seamlessly integrating into the sales reps’ process. Sales reps can do the majority, if not all of their work in Mobile CRM. And when changing the status of an opportunity is a matter of two simple taps on the screen, the management will always have the freshest data possible to make well-informed decisions whenever they need. No more “Please fill in your reports by the end of the week”.



# #45

## Get a quick overview of crucial data in one place

A mobile dashboard, just like a dashboard in Greentree CRM, acts as a homepage for your CRM–it's the first thing that pops up when you open the app, and its goal is to show you things that matter to you packed neatly into one place.

By default, a Resco Mobile CRM dashboard shows 3 charts: orders, opportunities, and cases. But that doesn't have to fit everyone. So why not create one that'll work for you? Why not tailor it exactly to your needs? You can do so very easily—just pick the things you want to see first. You can also include a second (or third) dashboard if you want to have multiple aggregate pages. All for the convenience.

# #46

## Compare & analyze

The multi-series charts display more values at once so you can compare and analyze, for instance, the estimated and actual revenues.

A multi-series chart displays more than two values at once. It's quite useful when you want to compare and analyze data. For example the chart shows won opportunities by account; displaying not only the total revenue but also the estimated one. You can see how much the opportunities really brought in and if your estimates match the results.

# #47

## Automate your googling

A good sales guy never underestimates the power of research. That's why one of the first things he does is to do a search of any new lead. Whether it's a company or an individual, the Internet is a great asset in finding out more before the first approach.

Why not make this mini-research easier? Your Mobile CRM app can automatically google a company or a person for you, so you can just take a look at the results.

# #48

## Find out where the drivers are

Mobile CRM can even function as a real-time GPS fleet tracker. Not only for transport companies, but also for all kinds of service providers like plumbing, appliance repairs or security services can find this very useful.

You’re able to see the movement of your fleet, so you can have oversight as to where your drivers are at any given moment and can give an accurate estimate of the time of the delivery to the customer. Combine it with the option to navigate to the assigned destination and having information on what to do and what to get approved once on the spot and you’ve got yourself a winner.

# #49

## Declutter your app

If you have too many things in one place, it can get cluttered. What you can do in case you can't just toss some of it away? You can separate them to restore the order.

Have too many charts to put on a single dashboard? Create additional dashboards. Are you a manager and want to display your appointments in one calendar and team appointments and tasks in another one? Do it. Would you like to have two maps, one for your accounts and the other for the whole team's accounts? Why not?

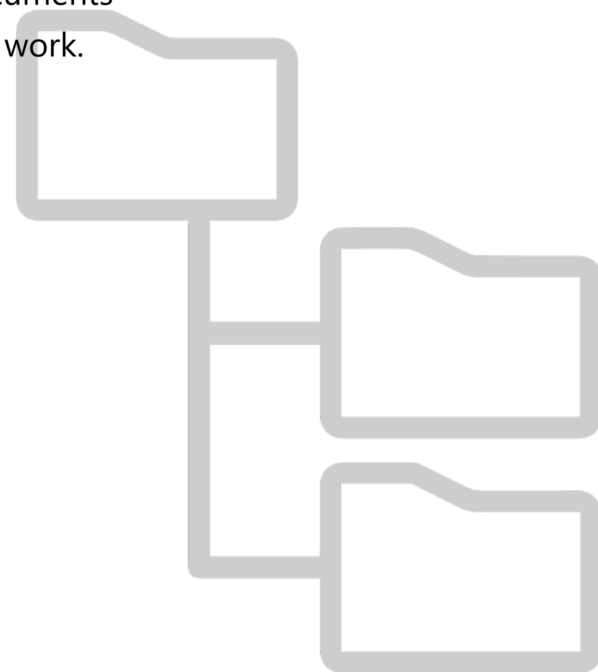
Stay organized even if you need more than fits a single dashboard, calendar or a map.

# #50

## Stay organized with folders

Can’t see the forest for the trees? Group numerous individual entities into folders to arrange your mobile CRM solution the way it suits you.

Entities can be grouped into different folders. You can create a folder for records and views you use most often; managers can create separate folders for different types of employees, and so on. It’s pretty much the same as having the documents on your PC divided into different folders–it helps you keep order while you work.

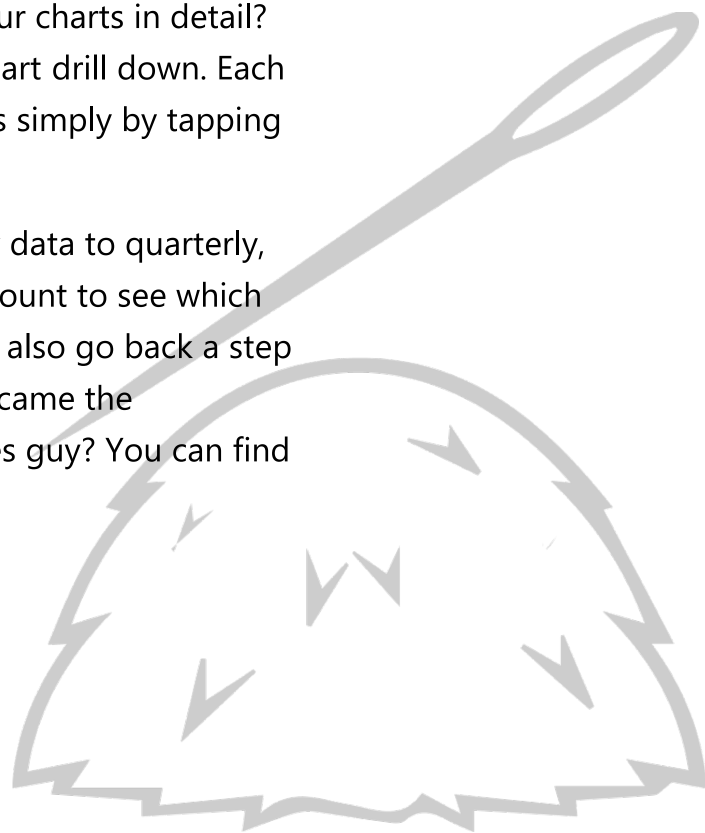


# #51

## Find the needle in a haystack

Charts and graphs turn data into digestible chunks of information that are understandable at first sight. But what if you need to analyze your charts in detail? You can examine them in depth by diving into your data with chart drill down. Each part of it can be broken into different charts, graphs or diagrams simply by tapping on it and choosing an appropriate criterion.

For example, when you are looking at the orders, go from yearly data to quarterly, from quarterly to monthly, and then inspect the amounts by account to see which customers brought in the most revenue last month. But you can also go back a step and see who of the sales reps produced the most orders and became the company’s top seller. Does the biggest order mean the best sales guy? You can find out.



# #52

## Keep track of email communication with the client

Tracking of emails might be the next best thing since sliced bread–you can see the exchanged email communication with a customer, so you or your colleagues will always have the details of what was said and done.

With Mobile CRM, even those emails sent and received on your phone or tablet will find their way into the database.

# #53

## Put a face to the name

Add images into your app to see a product's picture or a contact's photo. You can add pictures to a list of products, so you can browse and navigate through it faster. So when you look for a particular product, you don't need to read the names, you can just scan the list to quickly find the one you want.

Or you can add a photo to your contact (put a face to the name) that will trigger your memory. Helpful for the occasion when you are meeting the person face to face.

# #54

## Find people on LinkedIn, automatically

With over 300 million users, LinkedIn has become an essential media for many professionals. Chances are, you are as well trying to look for people you know or can connect to in order to expand your network, find new opportunities and built relationships.

Instead of painstakingly searching for people you know by typing in their name in the search bar, let your Mobile app find people for you automatically. Based on fields from your CRM, your contacts or leads can be found on LinkedIn, the ever growing network of professionals you're a part of.

# #55

## Visual merchandising done easy

The way of how products in stores are displayed and arranged is no accident. Everything is done so that the products attract customers and lure them to purchase.

With a mobile app, merchandisers can easily plan and carry out daily store visits. They can navigate to customer locations in their assigned territory, manage their schedules and routes, and coordinate product merchandising with the customer, sales associates, and back office. In the app, they can take photos of product fixtures and displays, answer checklists, do a quick inventory and report any issues back to the office. If you don't employ any dedicated staff in the field, turn your sales reps into brand ambassadors–they can easily snap photos and instruct the customer based on given guidelines.

The taken photos are then stored in CRM where they are easily accessible by merchandisers who plan and oversee the in-store product placements and visuals.

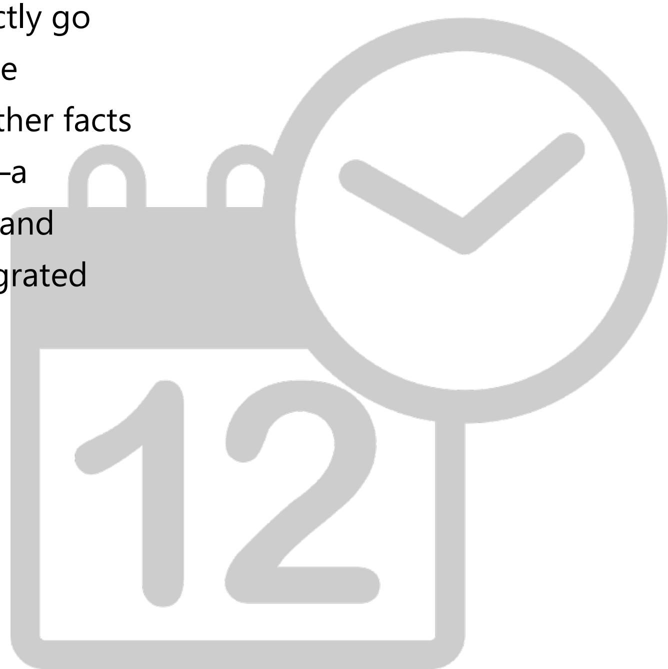
# #56

## Get a better overview of your time

Easily create appointments or reschedule the existing ones if the plans change. The neat calendar will help you organize your schedule and stay on course at all times.

What's the difference between using any calendar and one that's in your CRM app?

You don't need to switch between calendar and CRM app to plan your day. Which would be, let's be honest, quite annoying. In a CRM calendar, you can directly go into any activity to see the details about it. You not only see the topic of the appointment, but also the description, location, the people involved and other facts that will help you prepare for the meeting. You can also attach documents–a contract you want to talk about for instance. Or open up the appointment and make a quick call to confirm the meeting. Everything done seamlessly integrated within one application.



# #57

## Combine your work and personal calendar

Don’t schedule a meeting when you’re supposed to be at your kid’s school play.

You can import events from your private calendar into your CRM calendar. And vice versa–you can display CRM events in your personal calendar. Seeing all your appointments and events in a single calendar ensures your professional and personal life will not collide.

For example, if you see that you are planning to pick your parents up from the airport on Wednesday afternoon, you won’t schedule any meetings around this time in case you get stuck in traffic on the way back.

# #58

## Customize the calendar to fit your needs

Do you work at 4 am? No? Then why even have this time on your calendar? Set up a reasonable timeframe for your workday, such as from 8 a.m. to 6 p.m. You can also get rid of Saturdays and Sundays or turn off monthly view if you don’t use it. And while you’re at it, allow for seasonal workers to only see the calendar for specified months.

You can also assign different colors to specific activities. If you want, you can display your meetings in green, phone calls in yellow and tasks in blue color. It just makes the whole thing a bit more organized. You’ll get the basic information even without reading through you’re the endeavors you have planned.

# #59

## Get a 360° view of a customer on one screen

When designing the form, we kept one goal in mind: To provide a perfect overview of a record on one screen.

How is this accomplished? Once you click on a customer (or any other record), you can see the details as well as associated records immediately, without needing to go anywhere else. You can see if there are any outstanding service cases before you go and propose an additional product or quickly perform common actions–edit data or create a new opportunity or order.

The 360-degree view will not only gather all relevant content into one place, so you don’t have to search for each piece of information one-by-one, it will also help you understand customer data when put into context.

# #60

## Switch views to maps or charts

Do you prefer your leads, accounts, and contacts displayed on a map instead of a list? Or prefer visualizing your opportunities in charts, so you'll know where your focus needs to be? Whether you're the one or the other, having the option to switch any view to a chart or a map will allow you to see the data exactly the way you want it to see.

# #61

## Checklists, surveys, questionnaires, polls… to go

A mobile application makes it possible to easily collect information from people. Whether you need to do a market research or a quality check, you can do it in a mobile application. No papers necessary, just quick and easy gathering of data. And because you can do it all offline, there are no delays in the loading of new questions or troubles when you try to save the completed surveys.

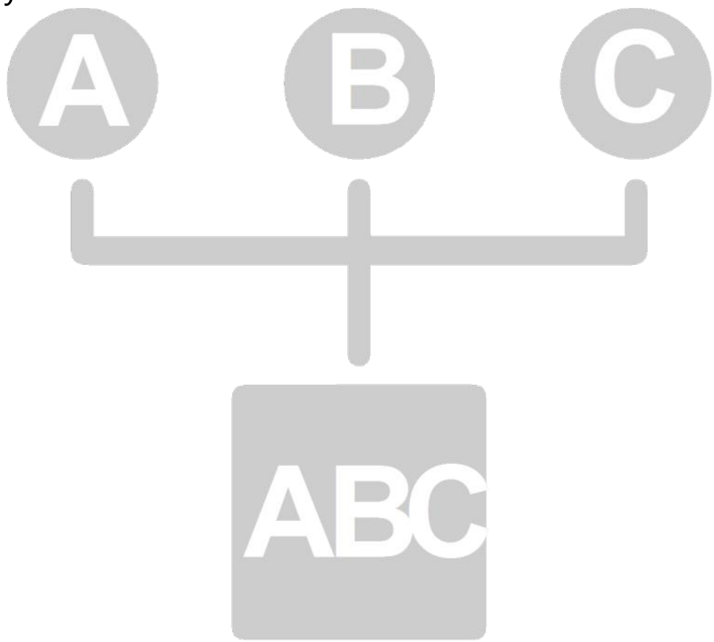
A company that builds large cargo ships can equip its engineers with a mobile application. The users go in with a tablet and check every nut and bolt on the ship, and store all their findings by ticking checkboxes.

# #62

## Avoid confusions by having it all in one place

Want to find out if the person you are talking to works for a company that is already a customer or still a prospect? Or you want to see which city the company is located in as you are looking at your opportunities? You know, to find out if you can pay the prospect a visit while you're in town.

Resco Mobile CRM allows you to pull information from other sources into one form, so you'll get a 360 view of any record. Ultimately, you're going to save yourself clicks and avoid confusions by having it all in one place.



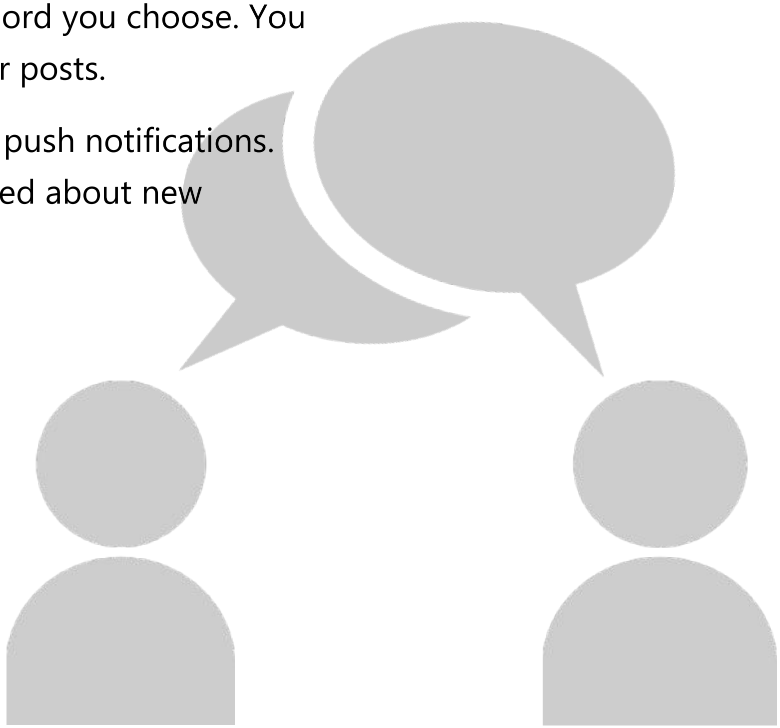
# Section 7
# Collaboration

# #63

## Chat with your colleagues

You can discuss opportunities and cases with your colleagues, without repeatedly calling each other or exchanging loads of e-mails. The chat is basically a Facebook for your CRM. But instead of sharing personal news, you're talking business. You can follow and participate in discussions about any type of record you choose. You can also share pictures, documents and links to records in your posts.

This collaboration works remarkably well because of real-time push notifications. Even when you're not working with the app, you still get notified about new comments and questions.



# #64

## Email link to a record

You can e-mail a link to a CRM record directly from the app if you ever need a second pair of eyes. You can ask your manager for an input or inquire more details from a colleague. Emailing a direct link to the record is a much more elegant solution than to tell someone to look up a record in CRM named so and so.

The 'e-mail a link' button creates two links to a CRM record in a single message. One for a web browser and the other for mobile access. The recipient can now access this record in the office or on the go. Simple as that.

# #65

## Share access to a record with a colleague

Let’s say you plan to go on a 3-week long vacation. You are desperately trying to get done as many things as you possibly can before you leave. The last thing you do is you set up an out of office message, listing your colleague as a reliable contact during your absence. The problem is, if one of your customers gets in touch with your colleague, chances are he won’t be able to help them much due to lack of access to your data.

Make sure your colleague has the means to cover for you entirely – share the access to your records with him. This means that during your absence, your colleague will have the permissions to perform actions in CRM system just as you would. And the mobile CRM application will ensure that these shared records are also available to your colleague in the mobile application for the time being.