

# CWR Mobile CRM

*Technical Overview*

Whitepaper

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## CWR Mobile CRM Technical Overview

### The Components

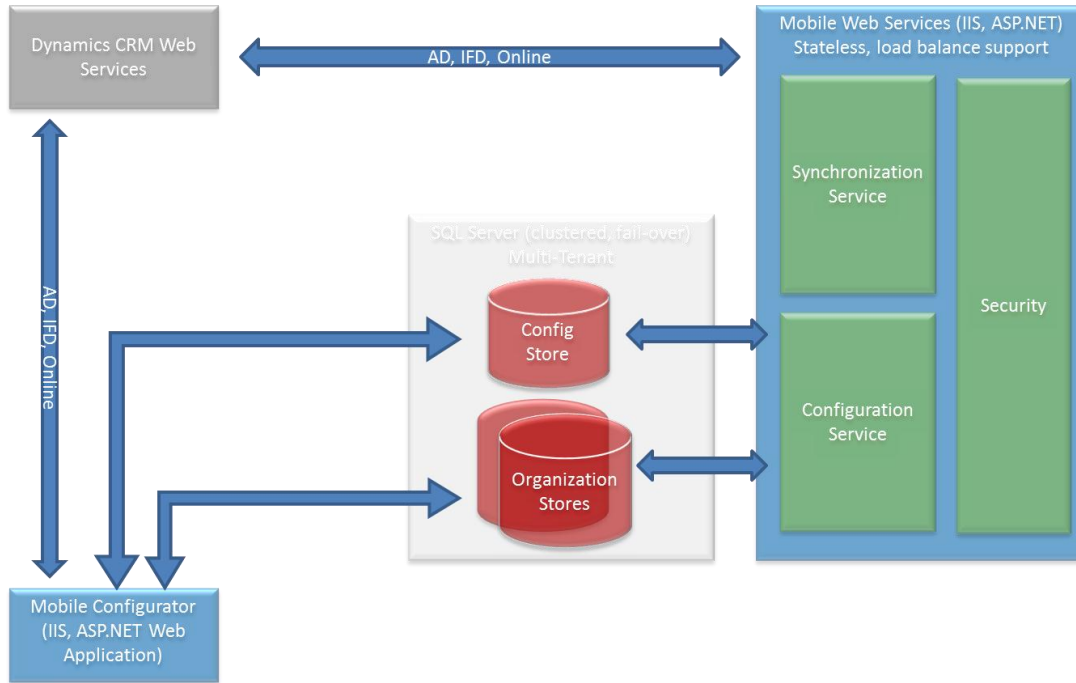
CWR Mobile CRM is designed natively on Microsoft Dynamics CRM WebServices. It relies on the CRM metadata and leverages this metadata as an inherent component of its mobile application platform. Therefore, there is no coding required to configure CWR Mobile CRM, rather you use the point-and-click Mobile Configurator right from within Dynamics CRM.

Making changes to the application is as easy as moving fields on a Form or View and then publishing the changes. CWR Mobile CRM then uses Dynamic Application Reconfiguration to update mobile clients, on-the-fly, whenever a user synchronizes their device with the server.

By taking advantage of the CRM metadata, CWR Mobile CRM can support practically all standard CRM entities, including custom attributes, custom relationships and relationship mappings and custom entities.

There are 4 major components to CWR Mobile CRM 2011:

1. CWR Mobile Configurator
2. CWR Mobile WebServices
3. The Mobile Clients
  - Native BlackBerry client (OS 4.2.1 and up)
  - Native iOS client (iPad and iPhone)
  - Native Windows Phone client (WM5.x, 6.x and WP7)
  - Online Web Client (CWR Mobile Express)
  - Native Android Client (expected Q3 2011)
4. CWR Exchange Connector (optional component)



**Figure 1.** An overview of the components of CWR Mobile CRM

## CWR Mobile Configurator

The CWR Mobile Configurator allows you to configure the different aspects of the mobile application. It contains the following functions:

Configure and manage Profiles for role-based deployments by using customized sitemaps, views and forms to create unique mobile experiences for individual user groups. Each Profile can contain distinct configurations of forms, views and filters.

- Import and manage Views for custom sorting and navigating through entities.
- Import and configure Forms to better adapt to the form factors of mobile devices.
- Manage Synchronization Filters to define what data is synchronized to the device.
- Manage Users and Devices. Each user can have multiple devices assigned to it. Users and Devices can be (de)activated, wiped, resynchronized, etc.
- Manage Client Sync Issues to be handled by an administrator on the server.
- Show Reports on synchronization statistics, error logging, etc.

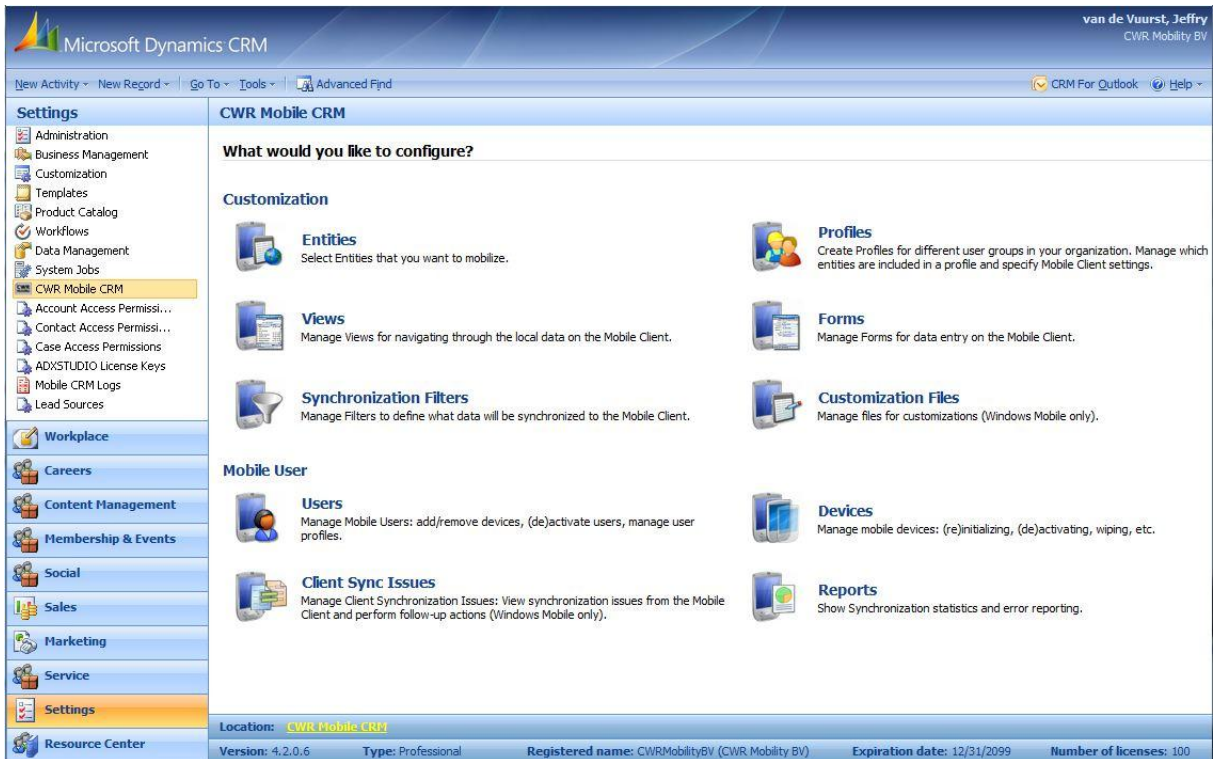


Figure 2. CWR Mobile Configurator integrated into Dynamics CRM

## **CWR Mobile WebServices**

The CWR Mobile WebServices are used for communication between the mobile devices and Dynamics CRM. It acts as a gateway between the mobile device and CRM and performs functions such as executing the Synchronization Filters to retrieve the required data for each user, synchronizing metadata and executing client requests (Create, Update, Delete, etc.) on the CRM server.

The intelligent CWR Mobile WebServices optimize the communication for each different mobile device. Data is compressed and sent in an optimized format per device type.

## **The Mobile Clients**

The Mobile Clients communicate with the CWR Mobile WebServices. Each mobile client retrieves the metadata and profile configuration and generates a user interface that is optimized for the specific mobile device.

You will see for example that the iPhone client is fully touch-optimized, whereas the BlackBerry client is optimized for easy navigation using the track ball or as a touch device when applicable. The Windows Phone client can be navigated using pen, keyboard or touch. Furthermore, the mobile clients leverage the capabilities of each specific device. The BlackBerry and Windows Phone versions feature integration with the native email and calendar clients. The iPhone version can integrate with the built-in Google Maps application.

## **BlackBerry Client**

The BlackBerry Client runs on BlackBerries with OS 4.2.1 and higher. Device specific features include integration with the native email and calendar clients and phone call integration.

The client can be downloaded from a separate Client Installation website on the CWR server or from the BlackBerry App World. The client in the App World has an option to run with sample data for demo purposes.

## iPhone/iPad Client

The iOS Client runs on iPhones, iPad and iPod Touch with iOS 3 and higher. This client can only be downloaded from the Apple App Store and also has an option to run with sample data.

## Windows Phone Client

The Windows Phone Client (a.k.a. Windows Mobile Client) is supported on Windows Mobile 5+ devices with both touchscreen and non-touchscreen. Just as the BlackBerry it integrates with the native email and calendar client (Pocket Outlook) and phone call tracking. Integration with navigation software like TomTom is also available.

## CWR Mobile Express Client

The CWR Mobile Express Client (not to be mistaken with the Microsoft Mobile Express Client) is a feature-rich, online-only web client. Just as the Microsoft version it runs on mobile browsers that support HTML 4. However, instead of showing the same user interface on all browsers, it detects the browser and displays an optimized UI for each browser, e.g. browsers that support the WebKit engine, such as iPhone Safari and the Android browser.

Furthermore, the Express Client has support for all of the common CRM actions, including creating activities, converting leads, closing opportunities, etc. It is also fully configurable using the CWR Mobile Configurator.

## SDK

Advanced customizations on Windows Mobile (5.x and 6.x) which supports form scripting (C# scripting) and custom form and field controls for advanced functionality. Examples can be downloaded from <http://www.cwrmobility.com>.

## Key Features

### Business Productivity

- **Familiar User Experience**  
Delivers familiar look and feel of Dynamics CRM to mobile device
- **Native applications**  
Smart client support for iPhone, iPad, BlackBerry, Windows Phone. Express web client support for Android
- **Powerful integration with native device applications**  
Email, Calendar, Contacts, Phone and Tasks for maximum productivity
- **Role-based information delivery**  
Delivers customized information to end users based on their specific organizational roles
- **Connectivity independence**  
Offline, Online and Hybrid connection support means mobile users always have access to their data
- **Background Synchronization**  
Synchronization occurs whenever network connectivity is present
- **Multi-Device Access**  
Users can connect multiple devices to their CRM user, including phones and tablets.
- **International Availability/Localization**  
Available in 25 countries and localized in 10 languages
- **Easy deployment**  
Available through AppStores and marketplaces and via enterprise deployment tools
- **Flexible licensing**  
Acquire traditional device licenses or choose the user-based model to more affordably license up to 3 devices per user

## Enterprise IT Efficiency

- **Managed entirely within Microsoft Dynamics CRM**  
Flexible point-and-click customization tools for business analysts. No separate management console, application or developer-level skills required.
- **Portable Application Model**  
Application configurations can be exported and imported for easy migrations.
- **Dynamic Application Reconfiguration**  
Mobile smart client dynamically update and self-configure when new forms or processes are deployed, without user intervention or deployment of new client
- **Server Grid Architecture**  
Allows for scalability, fail-over, load balancing and data center operation in the most demanding environments
- **Highly secure**  
Supports the highest encryption levels available on each mobile platform.
- **Multi-lingual, Multi-currency**  
Supports distributed operations and global deployments.
- **Multi-tenant**  
Supports the most demanding deployments in multi-tenant hosted settings.
- **LOB/xRM Applications**  
Enables rapid deployment of custom line of business or xRM applications
- **Flexible Deployment**  
Operates on-premise or can be easily hosted by Microsoft (Microsoft Dynamics CRM Online) or a partner
- **Complete solution**  
No third party/external middleware or applications required

## About CWR Mobility

Our mission at CWR mobility is to help organizations gain *The Power of Close*<sup>®</sup> -- the power to get closer to customers and stay there, increase customer satisfaction and loyalty while reducing the costs of customer interaction, and create a more agile and effective customer-facing organization.

We are an Independent Software Vendor and the leading provider of mobile CRM solutions. By offering the most advanced, multi-platform mobile CRM solutions -- based on the Microsoft Dynamics CRM platform – CWR Mobility continues to set the mobility standard for the entire CRM industry. We are committed to continuously taking Mobile CRM to the next level, enabling customers and partners to capitalize on the latest technology trends to make the most out of their businesses.

We have developed a partner network that already spans Europe, the Middle East and Africa, The Americas, Asia and Australia/New Zealand. Together with our partners we are delivering horizontal and vertical mobile CRM solutions to Enterprise and SMB companies in every corner of the globe.

## Microsoft Gold Certified Partner

CWR Mobility is a Microsoft Gold Certified Partner with competencies in Microsoft Business Solutions, Mobility Solutions and ISV/Software Solutions. CWR Mobile CRM is a Microsoft Certified Solution for Microsoft Dynamics CRM.

## Two-Time Global Partner of the Year Award Winner

For two consecutive years running, in 2010 and again in 2011, CWR Mobility has received [Microsoft's highest global award for mobile solutions](#) -- Mobility Business-to-Business Application Partner of the Year.

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