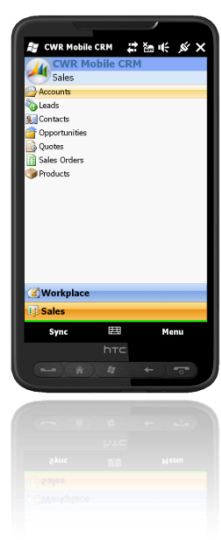
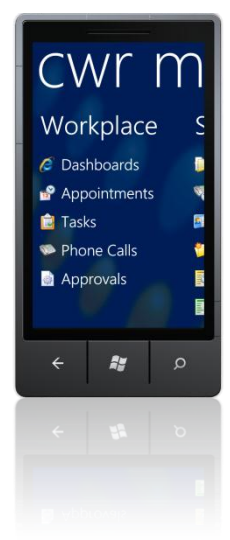


# CWR Mobile CRM

*Trial Walkthrough Guide*



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## Introduction

With CWR Mobile CRM for Microsoft Dynamics CRM 2011, you get the Power of Close™ ... so you can get closer to your customers and stay there. You can be more responsive to their inquiries (in real-time) and can convert any downtime into maximum marketing and sales effectiveness.

To help visualize this productivity, we are going to walk through several of the sections of the program so that you can take a look at how CWR Mobile CRM enables field marketing and sales professionals to be more successful by giving them complete access to all of their Leads, Accounts, Contacts and Opportunities, including all of their related notes, activities and tasks. We will walk through the Leads entity in detail so that you can get an idea of the power and flexibility of CWR Mobile CRM and then you can apply the same navigation concepts to the other sections.

You should already have downloaded and installed the Personal or Organization Trial of CWR Mobile CRM onto your mobile device. And, to follow along this walkthrough, we will be referring to the labels from the Sample Data that was first installed along with the trial. If you are using your own data, please adjust accordingly.

## Homepage

Let's launch the application, where we start from the homepage or sitemap. You will immediately recognize your Dynamics CRM within the native context of your mobile device. iPad and iPhone users will recognize that a swipe of their finger will let them access any of the CRM entities, while a BlackBerry user can just scroll down the list of entities.

## Custom Views

Let's start by selecting Leads from the sitemap. You are immediately presented with a View of all of your leads. Dynamics CRM allows you to create custom views so you can sort and display your data in a variety of ways. If you want to change your view, just click on the View icon (eye) or on the BlackBerry (BB) button and you will be presented with all of your View options.

## Add Leads on the Fly

You can also add new leads on the fly, right from here. Just press the BB button and select add or press the add icon in the bottom right to add a new lead. You will be presented with a blank form to enter your lead information. Indicators tell you whether a field is required, and your fields maintain their normal behavior for pick lists, date pickers, etc. After saving you will see an indicator that this data has not yet been synchronized with the server.

## Background Synchronization

CWR Mobile CRM uses background synchronization to stream changes up and down from the server so you never have to worry about whether you have an internet connection.

Moreover, you benefit from the speed and power of a native application with local data. And, if you ever need to pop online to get a specific piece of data, you have that option as well. You have access to your Dynamics CRM data every time and everywhere.

## Dynamics CRM Actions

After saving your data, you will also notice that you have the ability to access your normal CRM actions, including converting the lead to an opportunity. Swipe the action button or press the BB button to access Convert Lead. You can Qualify or Disqualify, create the Account, Contact and Opportunity forms, etc. just like you do on your desktop.

One of the most common requests is whether you have access to all of your standard CRM actions on the mobile device – and the answer is YES. And, as always, you can configure CWR Mobile CRM to present just the actions you want users to access. As you explore the other entities (Accounts, Contacts, Opportunities, etc.), you can examine the CRM actions that are available for each one.

## Form Layout

While still looking at a Lead detail form, please note that you can entirely reconfigure the information that is displayed on the form. In most cases, companies have designed their desktop forms for a landscape orientation; and included 30, 40 or 50 fields. However, when optimizing for a mobile device, you will want to think about a portrait orientation and you will want optimize the form so that it has just the information that is required by the mobile user.

## Role-based Deployments

Another aspect to mobilizing your Dynamics CRM is rolling out custom experiences, optimized for individual roles in the field. You might want to have a one profile for Field Sales that uses a sitemap focused on leads, opportunities, accounts and contacts, while you create a second profile for Field Service that is more focused around service activities, cases, accounts and contacts. CWR's mobile application platform enables you to deploy just the right functionality tailored to individual roles and optimized for each mobile platform.

## Related Entities

Well, you should still be looking at the Lead detail form on your screen. The power of a CRM system is that all of the data is related to each other. You can press the BB button or the

related icon in the bottom right and you are presented with a list of related entities. For Leads you can see related Activities and Notes. However, for entities like Accounts, you would be able to see: Activities, Contacts, Opportunities, Quotes, Orders, Invoices, Notes, Products, etc.

By accessing all of the related information, your mobile device becomes a power tool for helping your field teams quickly find and act on the information they need most. Please explore each of the entities in detail. See just how easy it is to adding new entities on the fly, search and retrieve account and contact information, record detailed notes and track meetings and tasks.

## Native Applications

Most of the mobile platforms also provide opportunities for CWR Mobile CRM to integrate into the native email, phone, calendar and task applications. For this scenario, I will refer to a BlackBerry, but it could just as easily be an Android or Windows Mobile phone.

On the BlackBerry, open the native calendar application. This is where your appointments are downloaded to your phone from your corporate system – usually Microsoft Exchange. You can view your calendar and manage your schedule. Highlight one of your appointments and then press your BlackBerry button. You will see that you can open the Appointment right into CRM. So your BlackBerry applications are integrated into Dynamics CRM with the press of a button.

You have this same functionality for Contacts, Tasks and Emails. The native BB applications become enabled as soon as the device recognizes that you have added the appropriate entity in CRM. Additionally, you will find when you dial contacts from CRM (by clicking on the phone number), the application recognizes that you made a phone call and asks if you want to track the call as phone call activity. Many built in features enable you to capture your activities in real-time so that you don't have to go into the CRM system at the end of the day and try to recreate your day's actions -- productivity on your terms.

## Explore on Your Own

In our walkthrough, we saw how easy it was to download the application from the respective appstore and load it onto your phone. We saw the speed and performance of the native, offline smart clients leveraging the local database. Most importantly, you saw how you can have every time, everywhere access to your entire CRM system right in the palm of your hand.

CWR Mobile CRM enables you to maximize your productivity and effectiveness by giving you access to your Leads, Opportunities, Accounts and Contacts, including all of your related

activities, tasks and notes. With CWR Mobile CRM you can respond instantly to customer needs, whenever those needs occur ... and you can convert any extra downtime in the field into maximum selling time.

## **Finally. More selling, Less admin. It's About Time.**

After you conclude your walkthrough or trial of CWR Mobile CRM, please select one of the options below to take the next step toward harnessing the Power of Close™.

**Ready to Buy Now or Discuss with a Licensing Specialist?** No need to wait. Please click [here](#).

**Not Ready to Buy Just Yet But Want to Keep in Touch?** No problem, just click [here](#).

**If you have opted to conclude your trial**, we thank you for trying out our software and hope you found it a productive experience. If not, please tell us by clicking [here](#), and we'll send you a response promptly.

## About CWR Mobility

Our mission at CWR mobility is to help organizations gain *The Power of Close™* -- 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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