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Introduction

CRM 8 Mobile provides access to CRM from iPhone and Android mobile devices. It is designed to work in both connected and disconnected modes, and shares the same database as other Oncontact CRM products.

Installing the Mobile Application

The Oncontact CRM 8 mobile application for iPhone is available for download and installation from the App Store. For Android devices, the application is available in Google Play. The application is listed under the name Oncontact CRM.

Logging In

After a successful installation, launching the application opens the Login page. A mobile data connection is required the first time you log into the application.

Required fields are outlined in red on the Login page. Most of this information is remembered after you log in, so you won’t need to reenter this data during future logins.

Server URL

The first field displayed is Server URL. This is the address of your Oncontact server application. For example, enter “https://crmsw.oncontact.com/crm/” if your application is hosted in the cloud. After successfully logging in, Server URL is no longer displayed on the Login page. You may still access this field in the Options tab.
User and Password
Enter your Oncontact User ID and password. This is the same ID and password you use to log in to the Oncontact CRM web application.

Profile
Enter your database profile name. This is the same profile you use when logging into the web application.

Work Offline
You may choose to work offline after the first successful login into the application. To work offline, select the Work Offline option before pressing the Login button. Data is not synchronized with the server when working in offline mode. The application will open in offline mode automatically when no connection is available.
Springboard

The user interface of the mobile application is module-based. The application opens to the Springboard page which provides access to the following CRM 8 modules and features.

- **Contacts**
  Enter this module to manage people and their related information.

- **Companies**
  Enter this module to manage businesses and organizations.

- **Opportunities**
  Enter this module to enter and track data related to sales opportunities.

- **To Do**
  Enter this module to schedule tasks and manage your open activities.

- **Recent Items**
  This feature helps you quickly return to items you opened recently.

- **Favorite Items**
  Items that you tag as favorites, like Contacts and Companies, are available here.

The Springboard includes indicators, in the right, upper corner of each button, to show a count of new items sent to the device since the last synchronization with the server. Tapping on a button with the indicator displayed opens a page to view new items.
List Pages
Tapping an option on the Springboard opens a List page. List pages provide features for locating and browsing records of a common type, like Contacts or Companies.

Items on a List page can be retrieved by entering criterion in the search field prior to tapping the Search button. Matching results are displayed in an alphabetically sorted list. Items may also be added from a List page by tapping the New button in the Toolbar at the top of the page.

**Advanced Search**
List pages include an Advanced Search option. Advanced Search helps you locate data by providing more criteria options when the single search field is not sufficient.

Tap on the Advanced Search button to reveal a list of specific criteria fields. Tapping the Advanced Search button a second time collapses this section.
With the Criteria section displayed, you may enter search criteria in one or more fields. Tap on the Search button to initiate the search. The example above shows a search for all companies in the city of New York with a status of Active.

**Server Search**

From a List page, you may also search the server database and download items that are not present on your mobile device. (A mobile device most commonly contains a subset of records found on the server.)

To search for server records, tap the Server Search toggle button at the top of any List page. The color of this button is green when you are searching the server. When searching for records on the mobile device, the button is grey.
Server Search functions in the same manner as a local search. Enter criteria and press the Search button to view results. The Advanced Search feature is also available when searching the server.

Results for a server search are preceded by a checkbox. Use this checkbox to mark the rows you wish to download. Tapping anywhere on a row toggles the checkbox between selected and not selected.

After one or more items are selected, the Download Records option appears at the bottom of the page. When you are finished selecting items, tap the Download Records button to load the selected records to your mobile device.
Navigation

Opening Items

On List pages, and other areas of the application, items that may be opened are displayed on buttons that include a right arrow image to the right-hand side.

Tapping on the button opens a View page which displays more detailed information about the item.

Back Button

To return to a previous page, tap the Back button displayed in the upper left hand corner of the application. The Back button is always displayed in this location when available.
**View Pages**

The details of an item may be viewed by tapping on a row in a List page. Shown in the following picture is the Contact View page.

**Toolbar**

View pages have a common toolbar displayed at the top of the page.

- The Back button takes you to the previous page.
- The Options button contains features particular to the type of item displayed. Common options are Remove and Add to Favorites. When this button is pressed, a menu of options is displayed at the bottom of the page.

The Remove option does not delete from the server. It only removes the item from your device. Your device will no longer receive updates for removed items.

The Edit button opens a page where field values may be edited. Press the Edit button when you wish to make changes or add data related to the item displayed.
**Tabs**

View pages may include tabs across the bottom containing information relative to the module to which the item belongs.

For example, the first tab on the Contact View page displays detail information like addresses and phone numbers. The second tab displays activities related to the selected contact.

Tap on the Activities tab page to view open and closed interactions related to the contact. From this List page you may add new activities, or tap on any row to view or edit details of a certain activity.

Tap on Details to return to the main tab page for the Contact view.

**Field Types**

View pages include several types of controls for displaying data.

**Detail Fields**

Detail fields are ones which may contain multiple rows, like Addresses or Phone Numbers. Detail fields in a View page display an expander
in the upper left-hand corner. Tap on the expander to reveal all rows. The expander arrow points down when all rows are displayed.

Tap the expander a second time, when the arrow is pointing down, to collapse the detail field. When collapsed detail fields only display the first row, which is the one marked as primary.

Phone Fields
Phone fields are detail, and also contain features for invoking calls and text messages. Tap on the Call button to place a phone call to the number displayed. Tap on Text to enter and send a text message. A new activity is created after using either of these features. Upon return from the device’s phone or text windows, you are presented with the Activity Edit page where notes or other information may be entered.

Email Fields
Similar to Phone, Email fields are detail and they also include a button to initiate an email. An activity is also created when sending an email.
Website Fields
Website fields, like the one on the Company View page, contain a list of URL hyperlinks. Tap on a row to open the corresponding page.

Group Boxes
Group boxes are a container for one or more related fields. They may be collapsed, like Detail fields, to conserve space, making it easier to scroll through data on a page. Profile information is displayed in a Group Box on the Company page. Tap on the expander in the upper left hand corner to display all fields. Tap the expander a second time to collapse this section.

Note Fields
Notes are also displayed in collapsible sections. Note fields grow as more data is entered, and are generally found at the bottom of most View and Edit pages.
Navigable Fields

Certain fields allow you to navigate to other items. For example, on the Contact View page you may open the related company by tapping on the Company Name field. Navigable fields include a right arrow image on the right-hand side.

You may return to the original item by pressing the Back button on the View page of the item to which you navigated. This button is located in the upper left-hand corner of the page.
**Edit Pages**

To alter the data displayed in any View page, press the Edit button in the upper right-hand corner. This button opens an Edit page. Edit pages closely resemble corresponding View pages. The same fields are displayed in the same order.

**Toolbar**

Edit pages also have a common toolbar displayed at the top. Both of these buttons take you back to the View page.

- The Cancel button cancels any changes you have made to data on the page.
- The Save button accepts and stores changes made.

**Field Types**

To edit a text field, tap on it to reveal the keyboard at the bottom of your device’s display.

Edit pages include several other special types of controls for adding and editing data.
Detail Fields

Detail fields, which allow for multiple rows, look a bit different when going from a View to an Edit page. When Edit pages open, detail fields are expanded so you see all rows right away. Special buttons, like the ones displayed on phone number fields for dialing and sending text messages, are not displayed in edit mode.

To add a new row to the detail field, press the New (+) button displayed to the right of the field title. For example, pressing this button on a phone field opens the New Phone page. Like Edit pages, pages used for adding data have a toolbar at the top with Save and Cancel buttons. Both of these buttons take you back to the previous page.

To remove data from a detail field, tap the Delete button on the row you wish to remove. You will be asked to confirm deletion of the row.
To edit data for a row in a detail field, tap anywhere on the row to open the corresponding Edit page. When you are finished editing, tap Save or Cancel to return to the previous page.

**Dropdown List Fields**
Dropdown fields are identifiable by the down arrow image on the right-hand side. These fields present a list of available values to select from. Company Type, for example, is a Dropdown field. Tap anywhere on the field to display available choices, and tap again on a value to select it.

**Zoom Fields**
Similar to Dropdowns, Zoom fields present a list of values to select from. Zooms are used for fields with a large number of choices and therefore provide additional features for searching and filtering. Zoom fields include a Search button to the right of the field.
When adding a Contact, you may relate an existing Company to the contact using a Zoom field.

There are two ways to locate values in Zoom field. First, tap on the field and start typing the value you are looking for. After typing the letter ‘a’, for example, all companies with a name starting with an ‘a’ are displayed beneath the field. Tap on a row in this list to select a value. You may also search for a value by tapping the Search button to the right of the field. This action opens a List page where you may search and browse records. A value may be selected by tapping on a row. Tap the Cancel button, in the upper left, to return without selecting a row. The Advanced Search option found on List pages may also be used when called from a Zoom field. Advanced Search presents a set of criteria fields to help refine your search.

To clear a value from a Zoom field, tap to edit the field and remove the value using the Backspace key.
Date Fields
Date fields are edited using the device’s native calendar control. Tap on a Date field to edit the value. The format and functionality of selecting a date varies according to the type of device you have.

Checkbox Fields
Checkbox fields have two possible values, true and false. Tap the field to alternate between the two choices. When the field contains a checkmark, the true value is selected.
Adding Records

New items may be created from List pages. From the Springboard, tap on an option to open the corresponding List page. For example, tap on the Companies option to open the Company List page.

In the top, right corner of every List page is the New button. Press this button to add a new item matching the type that the List page displays.

Pages used for adding records function in the same manner as ones for editing existing data. New pages generally have fewer fields so records can be created quickly and efficiently. Notice that required fields are outlined in red. Please see the Edit pages section of this document for details on the different types of fields.

The toolbar at the top contains two buttons, Cancel and Save. Tap Cancel to exit the page without saving the new record. After adding a new
record, the corresponding View page opens so that you may continue to add detail or work with the new record.

Activity records may be created from the To Do List page. They may also be created from the Contact, Company, and Opportunity View pages. For example, open any contact item. On the bottom of the page, tap to select the Activities tab. From the Contact Activity tab, tap the New button at the top, right-hand corner of the page.

The benefit of adding activities in this manner is that they are automatically related to the corresponding Contact, Company, and Opportunity items. There is no need to populate these fields on the New Activity page.

Similarly, the Company View page also includes a Contact tab. Contacts added from this page are automatically related to the company.
Recent Items

Recent Items is a list of the last 20 records you opened, ordered from most recent to least. This feature provides a way to quickly return to items that you may be working with often.

Items displayed in this list are preceded by an image according to their type; Contact, Company, Activity, or Opportunity. Tap anywhere on a row to open an item.

The Recent Item list is updated each time you open an item and should not require any maintenance. However, if you wish to manually delete items, tap the Edit button in the upper, right-hand corner of the page. A Delete image is displayed on each row in edit mode. Tap the Delete button on rows you wish to remove. When done, tap the OK button to exit edit mode.
Favorites

The Favorites feature works in a similar to Recent Items and is also opened from the Springboard page. This list, however, is not limited in size and you decide which items are displayed.

Add items that you open often to your list of favorites. For example, open any contact. From the Contact View page, tap the Options button in the toolbar. A menu is displayed at the bottom of the page. Tap the Favorite button to add this item to the list.

As with Recent Items, items in the Favorites list are preceded by an image according to their type. Tap anywhere on a row to open an item.

If you wish to remove items from the Favorites list, tap the Edit button in the upper, right-hand corner of the page. A Delete image is displayed on each row in edit mode. Tap the Delete button on rows you wish to remove. When done, tap the OK button to exit edit mode.
Login Options
The Login and Spring Board pages include an Options tab that contains administrative features.

Server URL
Server URL is the address of your Oncontact server application. For example, http://myserver.com/crm/. After successfully logging in, Server URL is remembered and should not need to be altered.

Clear Cache
Application pages are stored on the device to allow for offline access and improve performance. At times it may be necessary to clear these files to force the application to retrieve new metadata from the server. Use the Clear Cache option to clear locally stored metadata.

Clear Transactions
Changes to data made on the device are stored in a transaction table. The Sync option sends these transactions to the server. If data in this table becomes corrupt or unreadable, it may be necessary to clear the pending transactions using this option.
Delete Data Tables
This option removes all device tables used to store CRM data. Though seldom necessary, this option may be needed when switching Profiles or Servers. No CRM data remains on the device after clearing the data tables, data must be reloaded.

Remember Me
Check the Remember Me checkbox before logging in if you would like the application to remember your password.

About
Tap on the About option to view the application version you are running.
Springboard Options

The Options tab on the Springboard page includes the Clear Cache, Clear Transactions, and About options as found on the Login page. It also includes the following options which must be used when you are logged into the application.

Sync

The Sync option sends changes made to data on your device to the server. It also retrieves changes made to records on the server that are assigned to your device.

The application synchronizes with the server every time you log in and a mobile data connection is available. Synchronization also occurs each time data is saved on the device, when connected. So, it is not necessary to use the Sync option unless you want to immediately send and retrieve data.

Records assigned to a device include ones retrieved from the server using the Search Server feature. They also include ones assigned to the device using the Mass Assign features in the web based version of the application. Finally, any open activity created for a mobile user is assigned to their devices. All related data comes with a record assigned to a device. For example, when a company record is assigned, related contacts, opportunities, and recent activities are synchronized as well.
Touch All Data

The Touch All Data option tells the server to mark all records assigned to the device as changed. This forces all data to be sent to the device during the next synchronization. You may use this option after clearing data tables on the device to re-retrieve the assigned data.