CRM-Express®

Extends the power of Microsoft Dynamics™ CRM with the mobility of your Mobile Phone.

CRM-Express Give your workforce a significant advantage — instant access to their Microsoft® Dynamics CRM information anywhere, anytime using their handheld Smart phones — on the road, between meetings, even while on the move. If the Mobile Phone is within reach of a network, CRM-Express delivers mobile functionality to Mobile Executives. By delivering a rich user experience, CRM-Express extends overall usage of your CRM system by enabling remote access you're your Executives.

Overview

CRM-Express provides users the ability to selectively view, create, and modify their CRM data on a variety of internet capable devices. Such devices include Microsoft Windows Mobile Pocket PCs, Palm-powered handhelds, and RIM Blackberry devices. All CRM-Express Client details are stored on the CRM Server, so that there is no installation required on the mobile devices to enable this functionality. This considerably eases the deployment of CRM-Express.

Mobile Home Page

The home page lists all the entities that have been configured for mobile users. Clicking on an entity name will open an entity home page with a list of records for that entity.
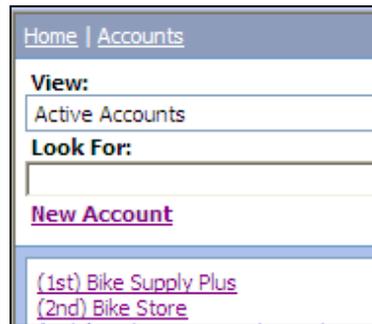
Account/Contact Home Page

Above the record list, the entity home page contains a view drop down and a Look For control. Accounts and Contacts are editable and a link will be shown so that users can create new records through their mobile devices.

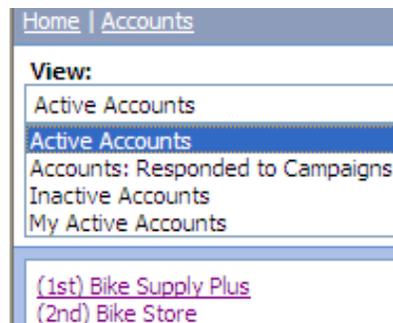Clicking on a record in the list will open that record in a read only form.

Views

Specific views are available through CRM-Express. Once a view has been selected, the Go button must be clicked. The record list does not automatically refresh once a view has been selected from the list due to the limitations of HTML 4.0. .
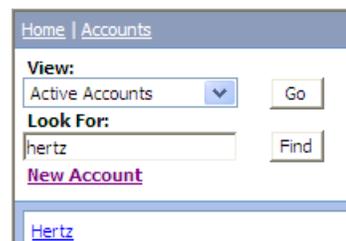
Find Control

The find control works much of the same way as it does in the web application. To use it, just type in the search text, and then click Find.

Read Only Forms

The read only forms allow the mobile user the ability to view the information for the record. Lookup field and URL fields will be active while on this form. Please see the section on Breadcrumbs for details on what happens when links to other records are clicked. If the entity is configured to be editable there will be an edit link at the top of the page that will open the record in an editable form.
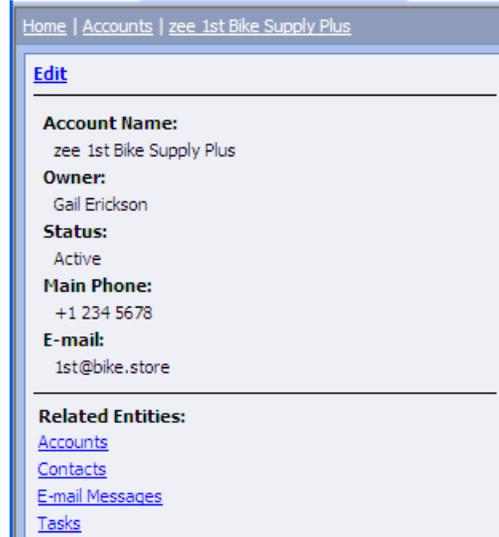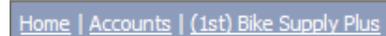

Related Entities List

The related entities lists will contain a list of entities that can be related to the current entity and have been configured for the mobile application. When a related entity link is clicked it will display a list of records that are related to the current record.

For example, if Contacts is clicked, all the related contacts are listed.
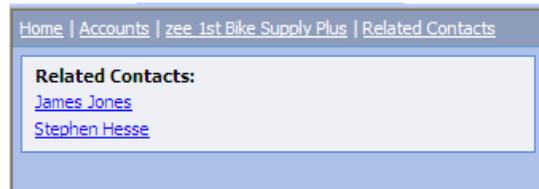

Breadcrumb Control

The breadcrumb control is the area at the top of all the pages in the mobile application. It allows the user to navigate back to pages previously used to get to where they are. Because of the limited amount of space, there some instances when the breadcrumb control might not retain the whole trail and will reset itself. For example, when clicking the Primary contact link on an Account form will take you to the contact record, but the bread crumb control will not contain the original account in the history.

When going to (1st Bike Supply Plus's record through the related entities list, the bread crumb control will maintain the trail as seen below.
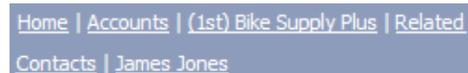
Editable Forms

Editable forms allow users to selected input information for a record and save it. Because of the limitation of the bandwidth limitations for mobile devices, selected fields have been implemented differently compared to the web based Microsoft CRM application.

Similarly for Contacts selected fields can be entered as below

Lookups

Lookup fields are implemented with two fields. The first is a drop down to indicate the entity type. If there is only one entity type available, it will just be a text indicating the type. The second is a text box where the user can type in the first part of the desired record. The user must enter the text and then click save on the form. If more than one record is found that could match the text, then a drop down is displayed to allow the user to select the correct one.

E-Mails and Tasks

E-Mails received by specific persons are shown against their related E-Mail messages.
In addition, the Parent account of the contact receiving the e-mail message will also show the link to the same E-Mail message.

Outgoing E-Mail messages will need to be configured so as to be copied to the respective CRM user's e-mail account, so they can be tracked in Microsoft CRM.

Similarly, related tasks can be viewed on CRM-Express by clicking the Task Link on the Related Tasks section.
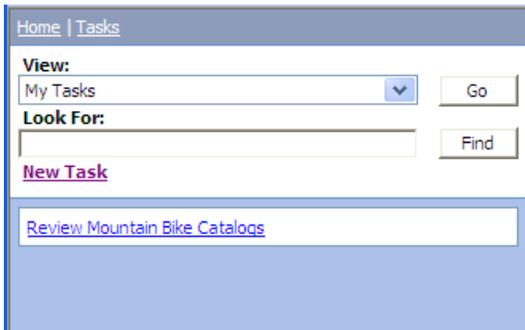
New Tasks can added and also be edited as required.
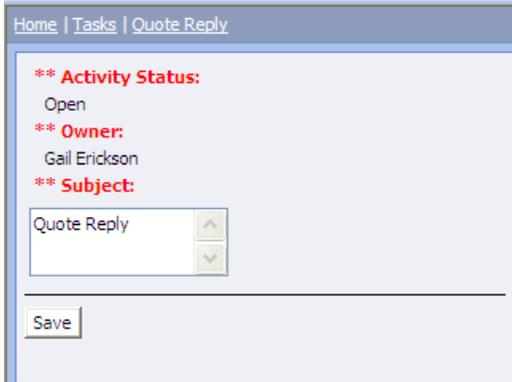
CRM-Express Pricing:

CRM-Express allows CRM Users to extend their functionality to hand-Held devices. The pricing depends on the number of Blackberry devices connected to the CRM Server, irrespective of the number of CRM users.

Initialization/set-us Fee: $2,995.00
This is a mandatory, one-time set up fee, regardless of payment option chosen.

One Time License Charges:

Number of Users	Price
1-24	$249-
25-49	$199-
50-99	$165-
100-249	$150-
250+	$135-

Notes:

- For Ongoing support costs, please contact your local supplier

- Quote valid for 30 days

- Minimum Annual Subscription Charges are for 10 CRM-Express users

- Payment Terms for Setup Fees and One-Time License Changes – payable in Advance with order.

- Delivery - Approx 30 days after Receipt of Order with advance payment

- Order cancellation charges before delivery of goods - 50% of order value

- All prices quoted are in US Dollars

- In interest of providing the latest version of the products, we reserve the right to provide equivalent products with same or better specifications

- Any additional screen customization requirements will be at additional charge based on pre-agreed screen formats.

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