

MICROSOFT MOBILE EXPRESS DEPLOYMENT GUIDE

Guide to setting up Mobile Express for the first time and set the views on your mobile devices

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ENTITIES AVAILABLE IN MOBILE EXPRESS

The following page lists the complete set of Microsoft Dynamics CRM entities available in Mobile Express and how users can work with them in Mobile Express. You can set up which specific entities are accessible to users.

Microsoft Mobile Express	Review Existing	Enter New	Description
Accounts	✓	✓	Enter a new account or review an existing account, which contains information about companies that do business with your organization.
Addresses	✓	✓	Enter a new address or look up information for an existing account or contact.
Appointments	✓	✗	Review existing appointments. An appointment does not include service activities or check for conflicts, and you cannot search for available times.
Campaigns	✓	✗	Review existing campaigns
Cases	✓	✗	Review existing cases.
Competitors	✓	✗	Review existing competitors.
Contacts	✓	✓	Enter a new contact or review an existing contact.
Contracts	✓	✗	Review existing contracts
Email Messages	✓	✗	Review sent, received, and pending e-mail messages.
Faxes	✓	✗	Review faxes that have been entered into the system
Invoice Products	✓	✗	Review products associated with an invoice.
Invoices	✓	✗	Review existing invoices.
Leads	✓	✓	Enter a new lead or review existing leads.
Letters	✓	✗	Track when a letter has been sent or received.
Marketing Lists	✓	✗	Review existing marketing lists
Notes	✓	✓	Add a new note to an activity or a record, or review an existing note.
Opportunities	✓	✓	Enter a new opportunity or review an existing opportunity.
Order Products	✓	✗	Review products associated with an order.
Orders	✓	✗	Review existing orders.
Phone Calls	✓	✗	Track when phone calls have been received or made. You cannot dial a phone number directly from this form.
Quote Products	✓	✗	Review products associated with a quote.
Quotes	✓	✗	Review existing quotes for opportunities, accounts, or contacts.
Services Activities	✓	✗	Review service activities.
Tasks	✓	✓	Create a new task or review an existing task.
Users	✓	✗	Review or search for people who have an active user account in Microsoft Dynamics CRM.

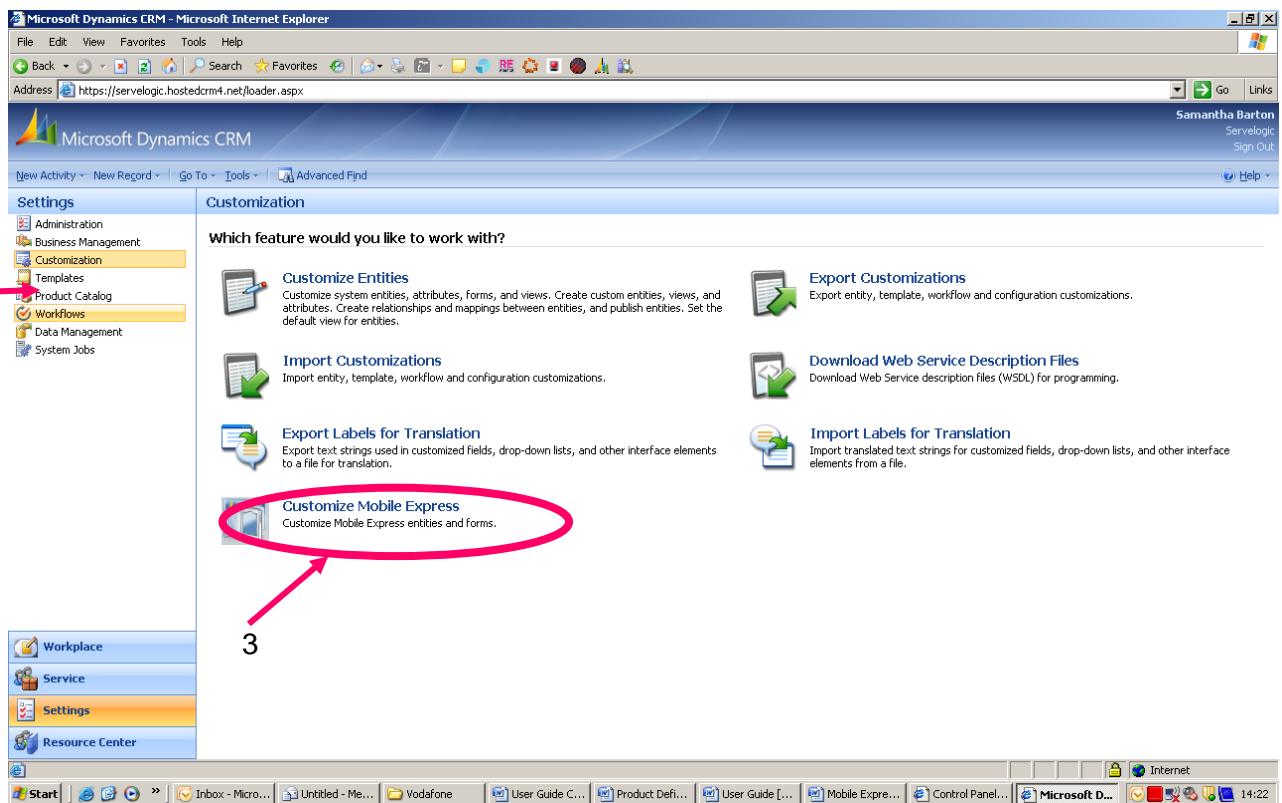
CUSTOMISING MOBILE EXPRESS

There are a few tasks you need to perform to properly customise Mobile Express for your users. You need to do this the first time you go to use Mobile Express to set it up on your mobile devices.

Make sure you are logged on to the Microsoft Dynamics CRM application with a user account that has the System Customizer or System Administrator security role.

➤ Customise Mobile Express entities and forms for the first time

1. In your main Microsoft Dynamics CRM application, in the **Settings** area, click **Customisation**, and then click **Customise Mobile Express**.



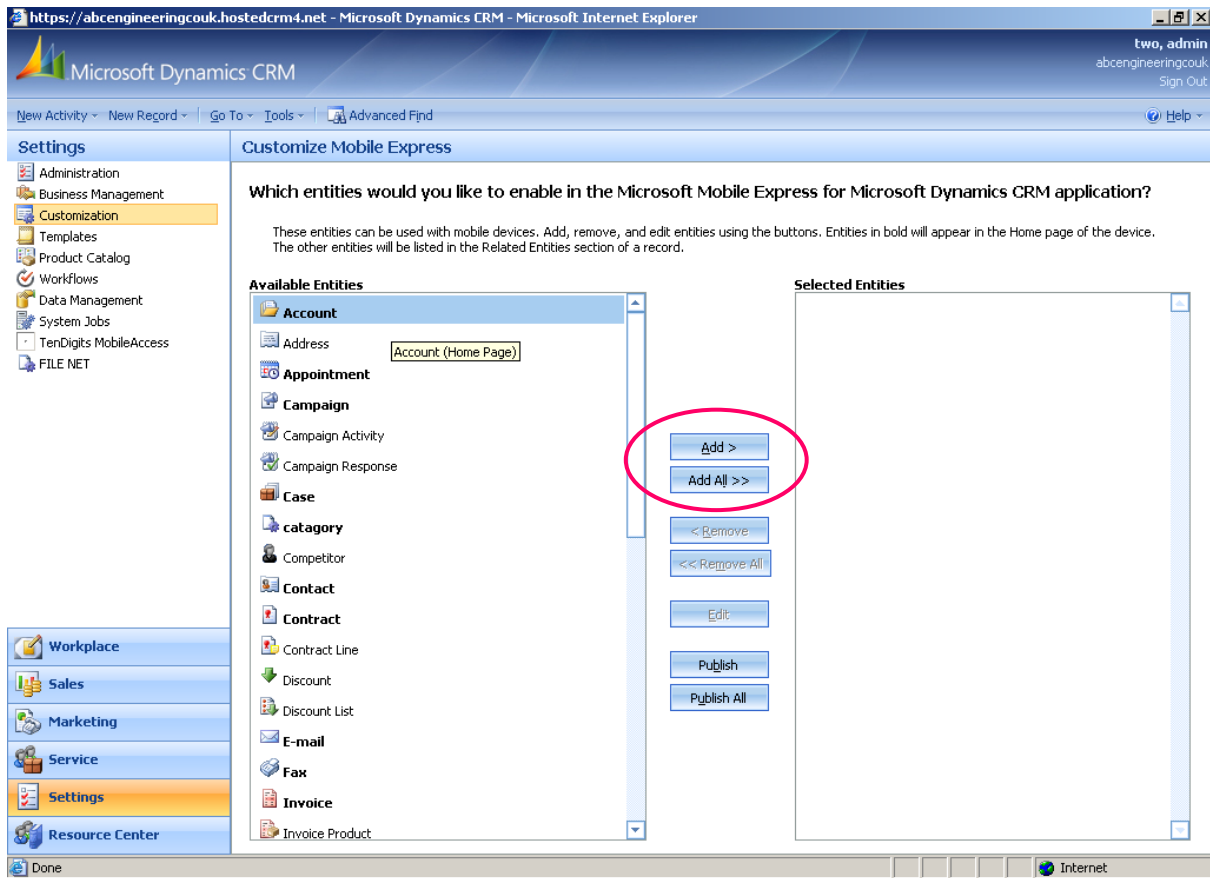
2. Select the set of entities you want to enable in Mobile Express from the **Available Entities** list.

Not all Microsoft Dynamics CRM entities are available in Mobile Express.

Tip

As you evaluate which entities and attributes you want to make available to mobile devices, consider the screen size and usage goals for your users.

3. Click Add.



4. For each entity you selected, customize the attributes that will be available on the Mobile Express form:
 - a. In the **Selected Entities** list, double-click the entity.
 - b. Select the attributes you want to be visible on the Mobile Express form from the **Available Attributes** list, and then click **Add**.
Required attributes are automatically listed in the **Selected Attributes** list; they cannot be removed.
 - c. (Optional) Change the order in which the entities are listed by using the **Move Up** and **Move Down** buttons.

Tip

When you define and organize Mobile Express attributes, consider which are expected to be used most frequently and place them at the top.

- d. Click **Save and Close**.
5. To publish all entities, click **Publish All**, or to publish selected entities, select specific entities in the **Selected Attributes** list, and then click **Publish**.

Important

When you publish customizations, remember that there is only one "master" publishing mechanism that always publishes Microsoft Dynamics CRM and Mobile Express together. Using the **Publish All** button in Mobile Express will publish all changes to not only Mobile Express entities, but will also publish any pending changes to the same entities in the main Microsoft Dynamics CRM environment. The reverse is also true: publishing in Microsoft Dynamics CRM will also publish entities in Mobile Express.

6. After you have customized Mobile Express, you need to provide the following access information to your users:
 - a. Access Mobile Express by using a mobile Web browser to navigate to. This is the usual web address/ URL which you enter on your PC but with **"/m"** added at the end.
 - b. Sign in using a valid Microsoft Dynamics CRM account. These are the usual log in details, exactly as you enter them on your PC.
7. You should now be able to view on your mobile device the entities you published using the admin interface. You can go back and amend/ change these at any time.