

MICROSOFT CRM 4.0 MOBILE EXPRESS USER GUIDE

Configuring and using Microsoft CRM 4.0
Mobile Express

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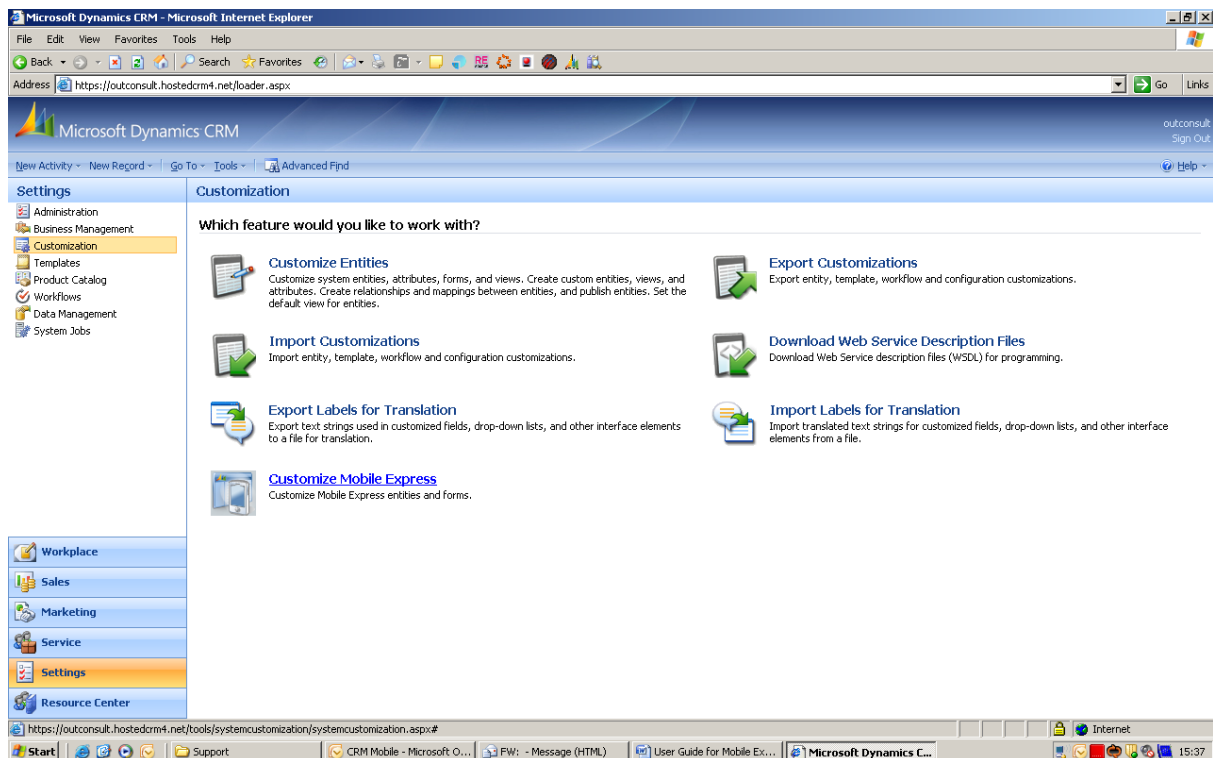
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Overview

Microsoft Dynamics CRM 4.0 Mobile Express provides users the ability to view, create, and modify their CRM data on just about any internet capable device. There is no installation required on the mobile devices to enable this functionality. Additionally, an administrative interface is available to enable users to control what and how users view their Organization's CRM data on the mobile devices

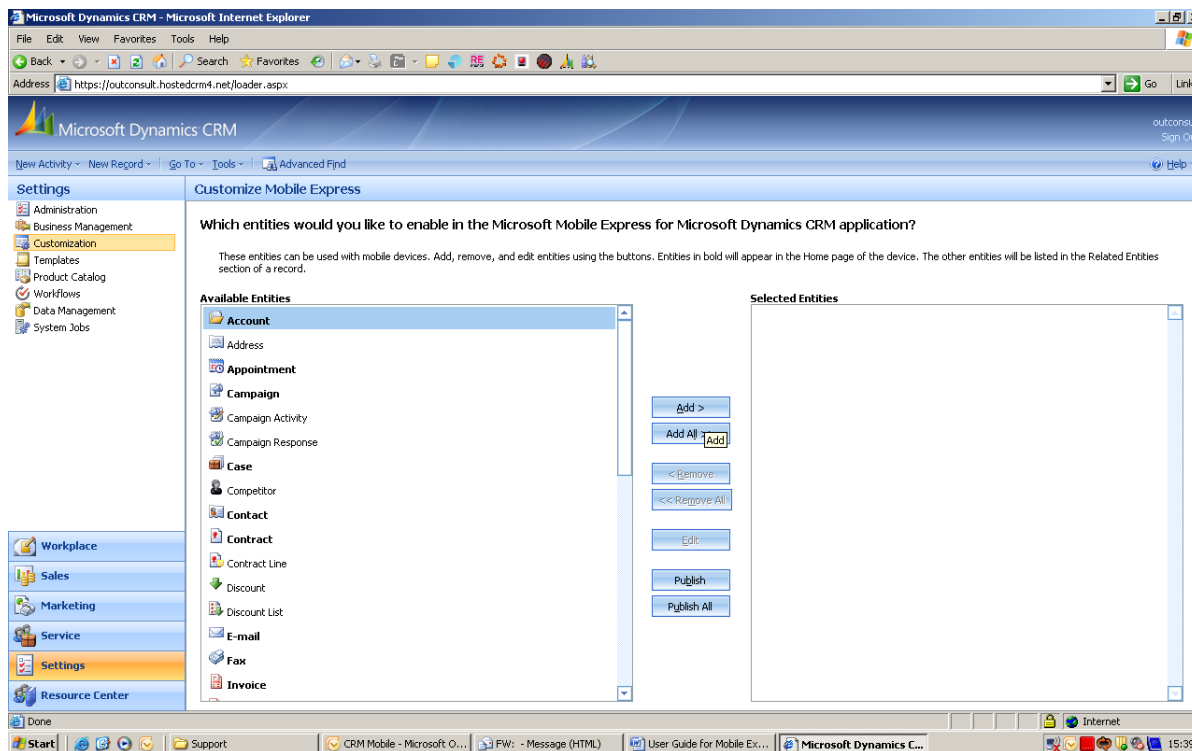
Administrative Interface

The administrative Interface allows users to configure which entities will be available on their user's mobile devices as well as how those entities will be displayed. The interface is available by going to the "Settings" area and clicking on "Customization" and "Customize Mobile Express".



Adding Entities

Almost any entity, including custom entities can be configured to be available to mobile users by Clicking on the Add button and choosing it from the drop down.



The Annotation (note) and Address entities are treated differently than most entities. They can be configured through this interface just as any other entity, but they will not show up on the home page of the Mobile Application. Instead, they will only show up in their parent record's related entity list.

Removing Entities

Entities can be removed from the list of available entities by selecting the entity and clicking the Remove button.

NOTE

If an entity is going to be deleted from CRM and it is configured to be available to mobile users, it must first be removed from the list of available entities before deleting it from the system.

Ordering Entities

The order that the entities are displayed in the list is the order in which they will appear in the home page and related entity lists in the Mobile Application.

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.

Adding Attributes

Attributes that are available for an entity through the mobile application can be added by selecting it from the Available Attributes and clicking the Add button. Attributes that are set to be required will automatically be put into the Selected Attributes.

Removing Attributes

Attributes can be removed from Selected Attributes by selecting it and clicking the Remove button. Attributes that are set to be required cannot be removed.

Ordering Attributes

The order of the entities can be set using the Move Up and Move Down buttons.

Publishing

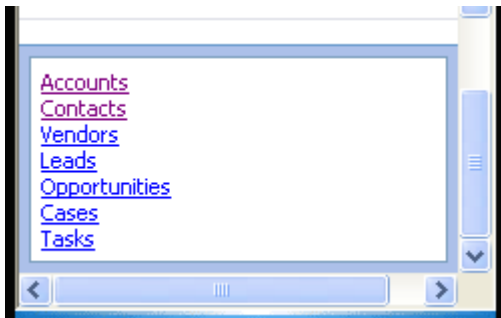
While the mobile application settings are being configured, they are stored in a Draft configuration file. If the application is closed prior to publishing, the changes will not be lost. The next time the configuration page is accessed, it will pull the information from the Draft configuration file so that configurations can be resumed. In order to have the configuration applied to the mobile devices, they must be published, by clicking the Publish button. The publish button will be disabled if the Draft and Publish configuration files are identical.

Mobile Application

The mobile application can be viewed on any internet enabled device.

Mobile Home Page

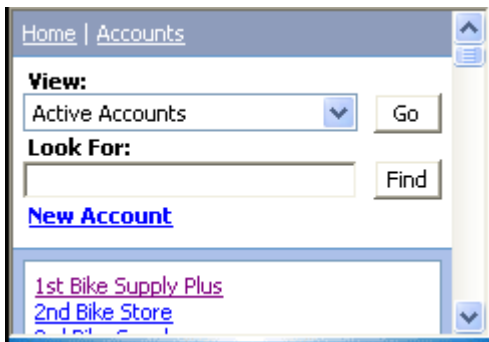
The home page lists all the entities that have been configured for mobile users. Clicking on an entity name will open an entity home page with a list of records for that entity.



Entity Home Page

Above the record list, the entity home page contains a view drop down and a Look For control. If the entity has been configured to be editable, 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.

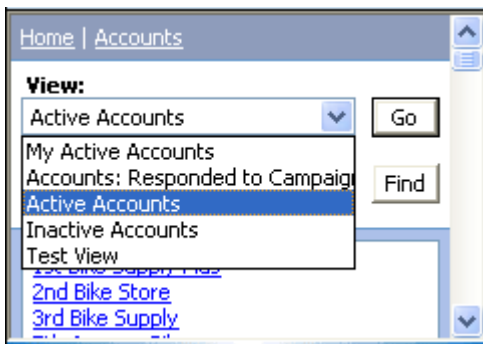


Views

All system view are available through the mobile application. User views will not be available. Once a view has been selected, the Go button must be clicked. The record list will not automatically refresh once a view has been selected from the list due to the limitations of HTML 4.0. To support any internet enabled device, no script is used on the mobile application web pages.

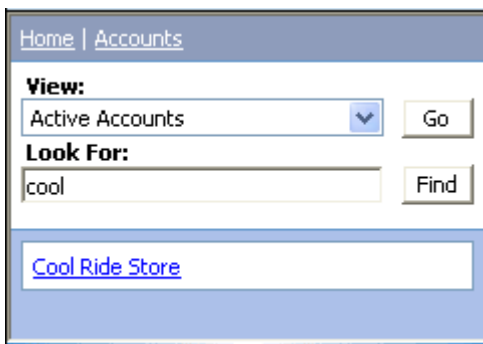
NOTE

If there is text in the search text when the go button is selected, it will still filter on that search text. It will need to be cleared if filtering is not desired.



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.

The screenshot shows a mobile application interface with a breadcrumb trail at the top: Home | Accounts | Bikes unlimited. Below this is a form titled 'Edit' with a purple link. The form contains the following fields:

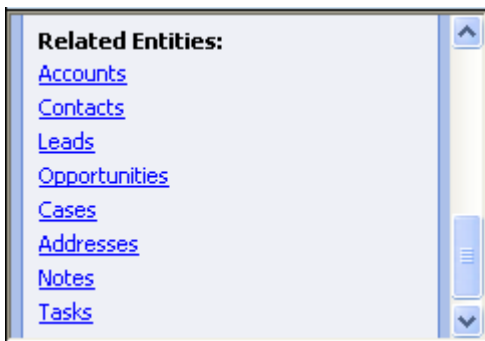
- Account Name:** Bikes unlimited
- Main Phone:** 555-0133
- Primary Contact:** [Stefan Hesse](#)
- City:** Seattle
- Web Site:**
- Owner:** Gail Erickson
- Status:** Active

Related Entities:

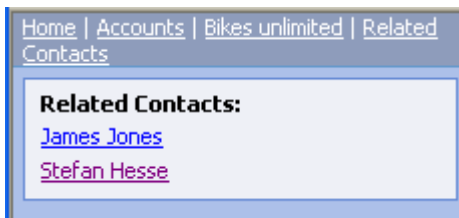
- [Accounts](#)
- [Contacts](#)
- [Leads](#)
- [Opportunities](#)
- [Cases](#)
- [Addresses](#)
- [Notes](#)
- [Tasks](#)

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.

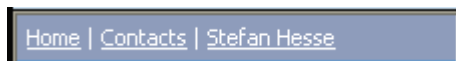


For example, if Contacts is clicked, all the related contacts are listed.



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 Stefan Hesse'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 input information for a record and save it. Because of the limitation of not having script on the pages, some controls had to be implemented differently than they are in the Microsoft CRM application.

The screenshot shows a web form for editing a contact record. The breadcrumb navigation at the top reads "Home | Contacts | Stefan Hesse". The form fields are as follows:

- * First Name:** Stefan
- ** Last Name:** Hesse
- Parent Customer:** Account (dropdown menu)
- Bikes unlimited
- Annual Income:** \$50,000.00
- Credit Hold:** Yes (dropdown menu)
- Birthday:** 06/24/1970
- Do not allow Bulk E-mails:** Allow (dropdown menu)
- ** Status:** Active
- ** Owner:** Gail Erickson

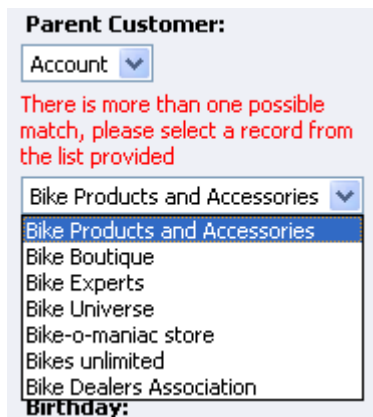
A "Save" button is located at the bottom left of the form.

Supported Controls

Control	Read-Only Form	Editable Form	Details
Lookup	Will be a link if the entity is configured to be available on the Mobile Client.	See Lookups section below for details.	
E-mail	Will be treated like a text field.	Will be treated like a text field.	This is a format for a nvarchar type field that is set on the attribute.
Text	Yes	Yes	This is a format for a nvarchar type field that is set on the attribute.
Text Area	Will be treated like a text field.	Will be limited to 3 rows.	This is a format for a nvarchar type field that is set on the attribute.
URL	Yes	Will be treated like a text field	This is a format for a nvarchar type field that is set on the attribute.
Ticker Symbol	Will be treated like a text field.	Will be treated like a text field.	This is a format for a nvarchar type field that is set on the attribute.
Int	Yes	Yes	
Duration	No	No	This is a format for a Int type field that is set on the attribute.
Time Zone	No	No	This is a format for a Int type field that is set on the attribute.
Date and Time	No	No	This is a format for a datetime type field that is set on the attribute.
Date Only	Yes	Yes	This is a format for a datetime type field that is set on the attribute.
Picklist	Yes	Yes	
Boolean	Will be treated like a picklist.	Will be treated like a picklist.	
Float	Yes	Yes	
Money	Yes	Yes	
ntext	Will be treated like a text field.	Will be limited to 3 rows.	
E-mail Body	No	No	This cannot be set through any UI, but does get applied to some ntext fields such as e-mail body, E-mail template body, etc.

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.



Parent Customer:
Account ▾
There is more than one possible match, please select a record from the list provided
Bike Products and Accessories ▾
Bike Products and Accessories
Bike Boutique
Bike Experts
Bike Universe
Bike-o-maniac store
Bikes unlimited
Bike Dealers Association
Birthday:

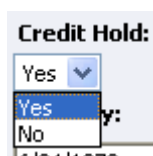
If a potential match is not found, the user is shown a message that it cannot be found.



Parent Customer:
Account ▾
An instance beginning with that name does not exist
jjj

Boolean and Picklists


In the mobile application Boolean (radio buttons and checkboxes) are treated as picklists as shown below.



Credit Hold:
Yes ▾
Yes
No

Date Fields

Date fields are displayed as text fields. The user must type in the date. Once they click save, if the field is not in the proper format, they will be displayed a message as shown below.



Birthday:
The specified date is invalid. Enter a date in the format: MM/dd/yyyy
13/24/1970