



Mobile@Connector for Microsoft Dynamics CRM





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Logotec Mobile@Connector for Microsoft Dynamics CRM

General information

Overview

Mobile@Connector for Microsoft Dynamics CRM provides mobile handheld access to Microsoft Dynamics CRM data. It is **not** a browser-based solution – your data is stored at your mobile device, you may work offline and synchronize at any time you wish.

The service enables mobile read and write access to:

- MS Dynamics CRM 4.0
 - installed locally at the customer's location
 - hosted by a Microsoft partner
 - Microsoft hosted (MS Dynamics CRM Online)
- MS Dynamics CRM 3.0

The solution is offered in the SaaS (Software as a Service) model, nevertheless:

- **Nothing** needs to be installed at you CRM server
- Your data stays at your server – it doesn't need to be moved to Logotec's server
- Logotec service only creates your mobile solution, and intermediates between your mobile device and your MS Dynamics CRM server while synchronizing.

It means that, for example, you can use Logotec's SaaS solution even if you use a local (on-premise) MS Dynamics CRM.

Logotec offers the service using different servers located in different locations so the users can freely decide which server they wish to use.

The solution supports the standard Microsoft Dynamics CRM functionality, and also the full range of customization specific for a given user (custom objects, specific form design etc.). It is important to notice that the user specific customization is included automatically – there is no need for manual customization (even that it is also possible).

It actually means that the service always creates individual solution for every user. The process is fully automatic and takes only about 15 minutes.

Important:

Using Logotec's service, you can decide to mobilize your whole MS Dynamics CRM or only part of it.

The solution support all (and only) Windows Mobile devices, including Pocket PC Phone Edition and Smartphones. It uses Logotec Engineering's award-winning technology to harness the full potential of the devices to provide a robust, yet easy to use and affordable, mobile experience for Microsoft Dynamics CRM users.

The access to your Microsoft Dynamics CRM calendar and to-do list is provided with the standard and very convenient to use Pocket PC tools (Calendar, Tasks). As you would expect, the data are still synchronized with your Microsoft Dynamics CRM account.

Supported devices

Theoretically all Windows Mobile devices are supported:

- Pocket PC (Windows Mobile 6.5/6.1/6.0/5.0)
- Pocket PC Phone Edition (Windows Mobile 6.5/6.1/6.0/5.0).
- Smartphones (Windows Mobile 6.5/6.1/6.0)

Including your individual customization automatically - limitations

As already mentioned, Logotec's service fully automatically includes your individual customization. However, as always, there are some limitations to this process.

Following customization will be included automatically:

- Access rights – the users will only see objects/information which they have right to access
- Design (forms' design like fields' label, location etc., objects names and visibility in menu/navigator, etc.)
- Fields' changes (added/deleted/modified fields and their properties)
- Objects' changes (objects added, deleted, or modified)

Following customization will not be included automatically:

- Server-side changes performed beyond MS Dynamics CRM (for example plug-ins written in C#, C++, Visual Basic etc.)
- Client-side changes like JVScrips, iFrames etc.(please remember: Windows Mobile Devices and "big" Windows computers are not compatible on the JVScrip level)

Important:

- *In 99% of cases, when some customizations cannot be automatically included, the mobile application can still be created and used (even if some functionality will not work).*
- *Even if such changes cannot be included automatically, they usually can be easily added manually, so in such cases please contact us.*
- *In case you use not "just" a customized MS Dynamics CRM but a specific, vertical solution based on MS Dynamics CRM and extended with a lot of specific extensions and plug-ins developed **beyond** MS Dynamics CRM, please contact us. We continuously work with several producers of such verticals to extend the use of our mobile solution.*

Acquiring the Mobile@Connector for Microsoft Dynamics CRM account

Important

- *To use our mobilization service, there is no need to install anything on your servers – our service contacts your server fully remotely*
- *When you use our mobilization service, your data stay on your server – there are not moved to our service. The service is only used for creating your mobile solution and for the synchronization (it intermediates between your mobile device and your MS Dynamics CRM server)*
- *To use your trial or the full version, you will have to enter your Microsoft Dynamics CRM account and password. We store your Microsoft Dynamics CRM account name in our system, but we do NOT store your password – the password is just forwarded to the Microsoft Dynamics CRM (encrypted). To be able to register, you will have to have a proper Microsoft Dynamics CRM account. It is not necessary if you just want to use the demo account*

You can select between 3 kinds of accounts:

- Demonstration (Demo) account – you can download a demo application with Microsoft Dynamics CRM demo data to your mobile device, and use it (**only read-only – no synchronization possible**).
- Trial account – you can have (free of charge) mobile access to your own Microsoft Dynamics CRM data without any functional limitations for 30 days. You can use for it your mobile device. **Nothing** needs to be installed at your server.
- Full version. Neither in this case anything needs to be installed at your server.

Procedures for the Demonstration (Demo) version

To register for the “Demo account”, it is not necessary to have any Microsoft Dynamics CRM account. Simply:

1. go to www.MobileConnector.com/MSCRM, select the option “Demo” and register there (be sure to enter your proper email address, since it will be used for notifying you);
2. our system will give you the possibility to work with the demo account while using your mobile device.

Important:

- *You will not be able to change or synchronize your data – the demo application is read-only.*
- *You can use the demo application as long as you wish.*

Procedures for the Trial version or the Full version

You will be able to use the Trial version or the Full version only if you have a Microsoft Dynamics CRM account. Nothing needs to be installed at your server.

Important:

At <http://www.mobileconnector.com/mscrm/Movies.aspx> you can find three short movies demonstrating:

- **how to create your solution**
- **how to download it and install**
- **how to use your mobile solution**

To register for the Trial or Full versions, simply:

1. go to www.MobileConnector.com/MSCRM, select the option “Trial” or “Buy”, and register there (be sure to enter your proper email address, since it will be used for notifying you);
 - You will be asked to enter your Microsoft Dynamics CRM account and password. We do not store your Microsoft Dynamics CRM password in our system – we just forward it (encrypted) to Microsoft Dynamics CRM to identify your account.
 - You have to enter information what kind of Microsoft Dynamics CRM server you use (MS Dynamics CRM Online, Microsoft Dynamics CRM 4, or Microsoft Dynamics CRM 3).
 - If you want to access Microsoft Dynamics CRM instance other than Microsoft Dynamics CRM Online, you will also need to enter the URL of your Microsoft Dynamics CRM server;
 - If you select Microsoft Dynamics CRM Online, you do not need to enter the IP address of the CRM server – our service enters this address automatically.
 - If you select the Microsoft CRM 4 or Microsoft CRM 3 option, you have to enter the IP address of your server yourself.

*MS CRM user name

*MS CRM user password

Adapter type

- MS CRM Online
- MS CRM 4 On-Premise
- MS CRM 4 Partner-Hosted (IFD)
- MS CRM 3

*Server address

*Required field **Continue**

Important for a partner-hosted or on-premise version (not for Microsoft CRM Online):

- *be sure that the Microsoft Dynamics CRM server is accessible by Internet (the easiest check would be to try to access it not **from** your computer)*
- *keep the web address of your server ready*
- *in order to create the mobile application be sure that your Microsoft Dynamics CRM account has following rights:*
 - *Your account is required to have the following CAL license:*
 - *Full*
 - *Administrative*
 - *Read-only license account WILL NOT work with the Mobile@Connector!*
 - *Roles*

- *Business Management tab*
 - *Organization Settings Enable Read, level Organization*
 - *Business Unit Enable Read, level Organization*
 - *User Enable Read, level Organization*
 - *User Settings Enable Read, level Organization*
 - *Role Enable Read, level Organization*
 - *Customization tab*
 - *Entity Enable Read, level Organization*
 - *Attribute Enable Read, level Organization*
 - *Relationship Enable Read, level Organization*
 - *Form Enable Read, level Organization*
 - *View Enable Read, level Organization*
 - *Workflow Enable Read, level Organization*
 - *System Job Enable Read, level Organization*
 - *Export Customizations Enable*
 - *Service tab*
 - *Contract Template, Organization level Read access*
 - *Article Template, Organization level Read access*
 - *Core Records tab*
 - *E-mail Template Enable Read, level Organization*
- *for version 3.0 users: Restricted access Mode turned on (Settings -> Business Unit Settings -> Users: Restricted Access Mode, for details [click here](#)).*
2. After you login, the service analyzes your MS Dynamics CRM. The process usually takes several minutes, and depends on the complexity of your customization and the speed of the Internet connection.
 3. The service tries to mobilize your MS Dynamics CRM account fully automatically, without involving you into the process. The strategy is to mobilize 100% of your “large” CRM, and to download all available data. **You will be involved by the service only in two cases:**
 - **when your solution is very complex,**
 - **... or when the amount of available data in your CRM exceeds the set limits or recommendations**

Of course, you can always use the “Advanced” option, if you wish to influence the process more deeply. You can then decide to limit the functionality only to specific modules/objects, or influence the data to be downloaded. For more information, see the chapter “The service – advanced settings”.

Important: the trial version offers practically same functionality as the full version. The only difference is that while using the trial version, you create the solution only for yourself, but while using the full version, you can create a solution for several people in one step.

4. After you make your decision regarding the configuration, you can (but not have to) enter the phone number of your Windows Mobile device.
5. thereafter, the system will create your specific mobile application. The application will include the customization you performed in Microsoft Dynamics CRM, and will also reflect the customizing parameters you set at the customization site. The process will take about 15 minutes. The system will send you an email informing you of the URL of your mobile application - the email will also contain all information necessary to use your application. If you enter the phone number of your mobile device, the system will also send you an SMS

with the link to your application. If you click the link the system will automatically download and install your mobile application and your data on your mobile device (you can find more information in the chapter "[Starting your mobile application for the first time](#)").

6. instead of using the SMS, you also can connect to the URL using the a browser on your mobile device. If you do it, the system will (exactly as when using the SMS) automatically download and install your mobile application and your data on your mobile device (you can find more information in the chapter "[Starting your mobile application for the first time](#)"). You can
7. the service will also send you an additional email informing you about the URL of your customization site, the access key and the access password to this site. You can use this site any time you wish, to modify your mobile application or to create a new version of your mobile application. You will find more information in the chapter "Customizing your application"

You will be able to use the application offline and also synchronize your local data with your Microsoft Dynamics CRM account (in both directions). If you have selected the trial version, your use will be limited to 30 days. You will find more information in the chapter "[Using your mobile application](#)"

Important:

- ***You can always change your mind, and change your customization. You will find more information in the chapter "[Re-customizing Your Application](#)"***
- ***Any time you change your Microsoft Dynamics CRM account you HAVE to go to your customization site and re-create your mobile application (the newly created mobile application will reflect all the changes you made in your Microsoft Dynamics CRM)***

Customizing your application

If you have customized the standard Microsoft Dynamics CRM functionality such as custom objects, forms, etc., it will be automatically reflected in your mobile solution.

The service tries to mobilize your MS Dynamics CRM account fully automatically, without involving you into the process. The strategy is to mobilize 100% of your “large” CRM, and to download all available data.

You will be involved by the service only in two cases:

- **when your solution is very complex,**
- **... or when the amount of available data in your CRM exceeds the set limits or recommendations**

Of course, you can always use the “Advanced” option, if you wish to influence the process more deeply. For more information, see the chapter “The service – advanced settings”.

Remember: the “Advanced” options should be used only by experienced users – don’t use them while visiting the service for the first time.

As mentioned already, the service tries to include all your modules/functions into the mobile application. Only in the case of extensively customized CRM accounts, it will suggest you to select rather specific CRM modules (“Sales”, “Marketing”, “Service”, etc.), instead of including all of them. “Extensive” means:

- the amount of objects in your application exceeds the amount such objects in a “standard” CRM by more than 50%,
- ...or the structure of your navigator/menu is at least 50% more complex than the same for the “standard” CRM”

Also, as mentioned already, the service will try downloading all MS Dynamics CRM data available for you into your mobile devices. If the amount of data will exceed recommended/maximum possible numbers, it will try to limit the number of records in the following way:

- If the number of records in an object will exceed the maximum possible number (5.000 records/object), then the system will automatically use the default “filters” (like “only the records I’m responsible for”, etc.) to limit the amount of record in the given object. This will be set automatically – you will only be notified

Important: If the number of records exceeds the maximum possible 5.000 records/object even when using the default filter, the service will switch to the advanced mode, where you can define the filters yourself

- If the number of records in an object will not exceed the maximum possible 5.000 records, but will exceed the suggested 2.000 records/object, the service will let you decide, if you still want to download all available records, or you want the service to limit the amount of data using the default “filters” (like “only the records I’m responsible for”, etc.)

The detailed information regarding the “default” filters, you can find in the chapter “The service – advanced settings”.

As the result, in the “normal case”, following web site will be displayed to you.

Force users to use safe connection only (https)

Encrypt data on mobile device

Name of your mobile application

The language of your mobile application:

Integrate appointments with Pocket Calendar

Integrate service activities with Pocket Calendar

Integrate tasks with Task Manager

The complexity of your MS Dynamics CRM is within the limits - all modules of your MS Dynamics CRM will be mobilized.

The amount of data in your MS Dynamics CRM is within limits - all your available data will be downloaded.

[Advanced settings](#)

While using the full version, you can select users authorized to use your mobile solution - this functionality is not available for the trial version.

[Create/Update application](#)

You only have to push the “Create/Update application” button then. Optionally, you can also change a few additional settings:

- The first field allows you to decide if the user has to, or only can, use https.
- The second field allows you to decide if the data in the local database has to be encrypted, or not (the encryption makes your application working slightly slower, so use it only if really necessary).
- The third field contains the name of your mobile application, which will appear at the start site of your application. By default, the system uses the name “MSCRMmob” and then a number, but you can modify the name accordingly.





Important: the name of the application is also an identifier of the application – due to this reason Mobile@Connector extends the name with numbers like “1”, “2”, etc., if the name you have chosen already exists.

- With the next positions you can decide about integration with Pocket Outlook. You will find more information in the chapter “[Integration with Pocket Calendar and Task Manager](#)”.

If your account is customized extensively (see the information above), additional information will be displayed:

Your application has been deeply customized - it is too complex to be fully downloaded to your mobile device. We highly recommend to limit its complexity by specifying not more than 2 modules which should be included into your mobile application.

Include in Application Object Name

- | | |
|-------------------------------------|--|
| <input type="checkbox"/> | 
Workplace |
| <input checked="" type="checkbox"/> | 
Sales |
| <input type="checkbox"/> | 
Marketing |
| <input checked="" type="checkbox"/> | 
Service |

and you will have to select the modules to be mobilized.

If the number of records in a specific object exceeds the recommended 2.000 (but doesn't exceed the maximum possible 5.000 records), you will additionally have to decide – for every individual object - which data have to be downloaded (all data, or only the filtered data), and then to push the “Create/Update application” button.

Note:

For information regarding the “Advanced” option, see the chapter “The service – advanced settings”.

The service – advanced settings

You can customize your application by accessing your individual customization site. This site will be displayed to you during the process of the registering for the service. However, you can access the site at any time later to re-configure your mobile solution. The link to that site is contained in the email which you will receive after registering for an account (either the trial or the real account). You will find more information in the chapter “[Re-customizing Your Application](#)”.

Note: the customization is not enabled for the demonstration – demo – account

After you select the “Advanced” option, the service will display the structure of your “large” Microsoft Dynamics CRM application.

Remember:

- **the “Advanced” option should be used only by experienced users – don’t use them while visiting the service for the first time**
- **the “Advanced” option is a one-way street: if you select the option, you will be not able to come back to the easy option of the service.**

Please choose predefined schema:

Selected modules ▼
 Selected modules
 Free Selection
 All

Object list

Object type name	Include into your application	Include in the local database	Only objects created yourself	Only objects modified yourself	Only objects owned yourself (if applicable)	Only records created during last XYZ days	Maximum amount of records in the local database [the limitation is 5000 , or 500 for events/tasks]	The number of records in the local database	Status
Workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
My work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	360	2000	432	
Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Workflows	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Quick Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Queues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	360	2000	0	
Articles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	360	2000	56	

Microsoft Dynamics CRM is a large application - its navigator structure contains almost 250 objects, and in case of many verticals built on it, the amount of objects is usually much larger. Navigating such a complex structure on a mobile device could drive any mobile device at its limits, or it could be confusing for some users. Due to this reason, several users prefer to limit the functionality (the amount of the objects in the navigator's structure) to a reasonable extent. Of course, the easiest possibility to do it would be to let the service user select the objects in the navigation structure himself. But because the structure is very large (as mentioned above about 250 objects) this process would not be the best solution for most service users. To make it easier the service offers so called "schemas"

A schema is a predefined set of objects to be included in the application. The reason is to help the user to mark the necessary objects without being forced to do it one by one with 250 objects. Of course, after selecting one module, you can go deeper, and exclude/include some sub-objects from the structure, defining the application as precisely as you wish.

We defined several schemas (the amount of them will be growing with the time), but we do not try to describe them in detail – we rather want to let you understand the concept).

“Selected modules”

This schema is the only one available for the trail account.

This schema is the default schema, and works in the following way:

if you select this schema you can go directly to the tree structure of your application, and you

can select one (and ONLY one) “module” (= part of the tree structure)

usually there are 4 main modules in the Microsoft Dynamics CRM system (they are marked with a blue strip in the tree structure):

- Workplace
- Sales
- Marketing
- Service

Remember: using this schema you can only select one module. If you try to select another one, the first one will be de-selected.

Object list

Object type name	Include into your application	Include in the local database	Only objects created yourself	Only objects modified yourself	Only objects owned yourself (if applicable)	Only records created during last XYZ days	Maximum amount of records in the local database [the limitation is 5000 , or 500 for events/tasks]	The number of records in the local database	Status
Workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Of course, after selecting one module, you can go deeper, and exclude/include some sub-objects from the structure, defining the application as precisely as you wish, However, this functionality is not available for the trial account.

Other schemas: “Manager”, “Rep”, etc.

Any other schemas also select a defined set of objects in the navigator tree, but - different than in the “Selected module”:

- the pre-selected objects can be located in several main modules, and not only in one
- the user can freely select/de-select other objects (there is no limitation to just one “module”)

Saving schema

If you select specific objects, and you would like to save the definition for later use, you can do it easily by using the button “Save my schema”.

If you do it, you will be able to use this schema in the future.

All objects you include in your application will also be included in your local database. Making a careful decision can radically limit the amount of data stored on your mobile device, which can increase the performance of your application, and – above all – the performance of the process of preparing data to be downloaded to your database and synchronizing data (all records that you have right to see)

By default the system sets the following parameters for your application:

- your mobile application includes no objects from your Microsoft Dynamics CRM account – you have to select the objects yourself by using the schemas and modifying the selection manually (as described above)
- in case of all selected objects (beyond Activities) following records will be downloaded:
 - objects you are responsible for (you are owner of)
 - objects you have created
 - objects you have edited

Of course you can freely change the selection.

- in case of Activities following records will be downloaded by default

Task	<input checked="" type="checkbox"/>	I'm owner of <input checked="" type="checkbox"/> Status <input type="text" value="Open"/>
Fax	<input checked="" type="checkbox"/>	I'm owner of <input checked="" type="checkbox"/> Status <input type="text" value="Open"/> Created within last XYZ days <input type="text" value="30"/> Incoming <input checked="" type="checkbox"/> Outgoing <input checked="" type="checkbox"/>
Phone Call	<input checked="" type="checkbox"/>	I'm owner of <input checked="" type="checkbox"/> Status <input type="text" value="Open"/> Created within last XYZ days <input type="text" value="30"/> Incoming <input checked="" type="checkbox"/> Outgoing <input checked="" type="checkbox"/>
E-mail	<input checked="" type="checkbox"/>	I'm owner of <input checked="" type="checkbox"/> Status <input type="text" value="Open"/> Created within last XYZ days <input type="text" value="30"/> Incoming <input checked="" type="checkbox"/> Outgoing <input checked="" type="checkbox"/>
Letter	<input checked="" type="checkbox"/>	I'm owner of <input checked="" type="checkbox"/> Status <input type="text" value="Open"/> Created within last XYZ days <input type="text" value="30"/> Incoming <input checked="" type="checkbox"/> Outgoing <input checked="" type="checkbox"/>
Appointment	<input checked="" type="checkbox"/>	I'm owner of <input checked="" type="checkbox"/> Status <input type="text" value="Open"/> I'm required attendee <input checked="" type="checkbox"/> Appointment start not older than (days) <input type="text" value="30"/>
Service Activity	<input checked="" type="checkbox"/>	I'm owner of <input checked="" type="checkbox"/> Status <input type="text" value="Open"/> I'm on the resources list <input checked="" type="checkbox"/> Service's start not older than (days) <input type="text" value="30"/>
Campaign Response	<input checked="" type="checkbox"/>	I'm owner of <input checked="" type="checkbox"/> Status <input type="text" value="Open"/>
Campaign Activity	<input checked="" type="checkbox"/>	I'm owner of <input checked="" type="checkbox"/> Status <input type="text" value="Open"/>

The limitation is set for 2,000 records of any object type. However, this has to be understood as a suggested limitation - **you can change this number but the maximum possible number is 5000.**

Note:

There are also several objects used in the MS Dynamics CRM not represented clearly in the MS Dynamics CRM objects navigation structure. Due to this reason, they cannot be found in the service's objects structure. In such case the limit is set internally to 15.000 records – you cannot influence the setting.

Remember: the default limits (2.000 records) set in the service have to be understand not as the absolute limits caused by our technology but rather as default limits, reasonable for most cases. If the limits are not satisfying for you, please contact us.

If the set limitation (the default 2,000 records, or any other number set by you) is exceeded, the status of the given object is “Not OK” - the status is displayed individually for the given object. It is not possible to create your mobile application until the statuses of all objects are OK.

In such case, you have to change the parameters of the given object until the setup status is changed to OK. You can do this by shortening the period (for example: only records created in last 30 days and not 90 days), by selecting only your own data (and not all data you have access to), or by changing the limitation of the number of records in the given object type. Only after doing this will you be able to select the option “Create application”.

Any time you change the definition of an object, the service contacts your Microsoft Dynamics CRM server, and displays the number of records which will be included in your local database. This takes usually a few seconds.

Administrating the application users

This chapter explains how you can use the Mobile@Connector service for managing mobile access for several users

Important: the functionality described in this chapter is accessible only if you have a Full account. If you are using the Trial account, the functionality will only be read-only (you will be able to see the information but you will not be able to use it).

When you create a mobile version of your Microsoft Dynamics CRM application several situations are possible:

- your Microsoft Dynamics CRM account used for log-in to our service does not have access to the Microsoft Dynamics “Profile” object (user management)
- your Microsoft Dynamics CRM account being used for log-in to the Mobile@Connector service:
 - o can access the information in your Microsoft Dynamics “Profile” object,
 - o only one profile is defined,
 - o and only one language is used
- your Microsoft Dynamics CRM account being used for log-in to the Mobile@Connector service:
 - o can access the information in your Microsoft Dynamics CRM “Profile” object,
 - o more than one profile is defined,
 - o or more than one language is used

Let us explain the given situation in more detail.

Situation 1

If your Microsoft Dynamics CRM account has no access to Microsoft Dynamics CRM Profile object, the created application can be used only by yourself. It is obvious: Even if such a profile exists, and even if there are users registered in this profile, the system is not able to gain any information regarding the profile and its users.

Situation 2

If your account has access to the Microsoft Dynamics Profile object, only one profile is defined, and all users from the profile use the same language version, you will see the user list of your profile, and you can decide, which users have right to use the application. After you do it, the created application can be used by all of them – the system will automatically notify them (by email) that the application has been created, and how it can be used. You can also add a custom message to this standard notification email. The created application will be same for all users (but still they will only see data they have rights to).

This application can be used not only by the current user, but also by all users from the G1 MS CRM profile. Decide, please, which users should have right to use this mobile application.

User name	Permission to use the application
crmusr1	<input type="checkbox"/>
crmusr2	<input type="checkbox"/>
crmusr3	<input type="checkbox"/>
crmusr4	<input type="checkbox"/>
administrator	<input type="checkbox"/>

After you configure your application all users from your profile selected above will be notified by email. The email will contain the link to the application, the link to the user manual, and additional, useful information. If you wish to add a small message to this email (max. 512 characters) type the message below:

There are also other user profiles defined. You can decide, which profiles, and which users from given profiles have to have mobile access to their MS CRM accounts. You also have to define which users have to configure the application for their profiles – the application will be ready to use only after they configure the application.

Permission to have mobile access	Profile name	Right to use	Right to configure	User name
<input type="checkbox"/>	G1	<input type="checkbox"/>	<input type="checkbox"/>	crmusr5

All users selected above, being responsible for configuring the application for their profiles will be notified by email. The email will contain the link to the configuration site, necessary credentials, the link to the user manual, and additional, useful information. If you wish to add a small message to this email type the message below:

Create/Update application

Situation 3

If your account has access to the Microsoft Dynamics CRM Profile object, and more than one profile is defined, or more than one language version of Microsoft Dynamics CRM is used by them, the system will first behave exactly as in the case of just one profile: you will be able to configure your application, see the user list from your profile, and be able to decide who of them can use the application. The users – exactly as in Situation 2 - will be notified by email.

Additionally the system will display a list of all profiles, and you can decide which profiles have to have mobile access to their Microsoft Dynamics CRM accounts.

Important: if in a given profile some users will use one language version of Microsoft Dynamics CRM and some another one, the system will divide the profile into as many profiles as languages the users of the profiles use.

You will see the user list of every selected profile and you will be able to decide which users from the given profile should have mobile access to their Microsoft Dynamics CRM data. You will also have to select at least one user from every group, who should have the right to configure the application. After you make those decisions for every profile, and after you push the button "Create application", the system will inform users responsible for configuring the application that they have to go to the configuration site, and have to configure their applications properly. After they do it, the system will inform, by email, all users from the given profile (only if you have given them the mobile access) that the application is ready and how they can use it.

Important: the system will then created not only one solution for all users, but several solutions in several languages.

Starting your mobile application for the first time

Important: you can use any kind of connection while working with your mobile application. However, if you are using it for the first time, a big amount of data will be downloaded: the local database, the local part of the application and all data you need locally. Due to that reason, consider using a fast and not expensive connection if you start the application for the first time.

1. If you have entered the phone number of your Windows Mobile device while defining the application in Logotec service, the service sends you an SMS with the link to the application. If you click the link, a default browser of your Windows Mobile device will be started and connected to the link. After the log-in site is displayed on your screen, the system informs you that you do not have a "Mobile@Connector client" installed on your local device, and then starts the installation process automatically - you have to accept it.
2. If you haven't entered the phone number of your Windows Mobile device while using the service, you have to start a browser on your Windows Mobile device and enter the link to your mobile application (sent to you by email) manually – the process will be same in both situations.
3. After the installation is completed, Mobile@Connector client will be started automatically. If you don't have Mobile Compact Framework version 3,5 installed on your Windows Mobile devices, the system will automatically start downloading and installing it.

Important:

If you are using an external memory card, you will be asked (during the installation process) where the Compact Framework has to be installed: On the external card, or in the main memory. Please, use only the main memory for installing Compact Framework!

4. After the installation is completed, close the browser and start Mobile@Connector client (Today screen → Programs → M@C). The system will display a window with the name of your mobile application (not the whole link, but only the name). You only have to click the "Connect" option.
5. The system will display the login site of your application – log-in using your Microsoft Dynamics CRM username and password.

Important:

- **please reset your mobile device before connecting to the URL and be sure that you have at least 25 MB free memory.**
- **the following description concerns installation on Windows Mobile 6.5/6.1/6.0 Professional and Classic devices. For differences concerning Windows Mobile 6.5/6.1/6.0 Standard and Windows mobile 5.0, see additional comments following the installation description.**

6. Thereafter the system automatically downloads the local part of the application to your local device. It usually takes 1-3 minutes – but only for this first time)
7. Thereafter the system starts preparing and downloading data you wished to store on your local. The process of initially downloading and saving data to your local data usually takes 5-20 minutes - the time depends on the amount of data, connection speed, and the “power” of your mobile device as well. After this process is completed, you can work offline (with thousand of local records saved on your local device) – and use data synchronization at any time you wish.

Important:

- *please reset your mobile device after downloading the local data*
- *If you encounter any problems while downloading your application/local data (such as losing the connection, problems with your device, etc.) you still can reset your device, start your application a second time (**after connecting to the Internet**) and the system will continue to download exactly from the point at which the download process was broken.*

Additional remarks concerning installation on devices older than Windows Mobile 6.0

All Windows Mobile 6.5/6.1/6.0 devices have Microsoft SQL Server Compact Edition already installed in ROM.

On Windows Mobile 5.0, Microsoft SQL Server Compact Edition is not installed.


Mobile@Connector for Microsoft Dynamics CRM recognizes the situation, and installs Microsoft SQL Server Compact Edition on those devices.

Important:

- *In the case of Windows Mobile 6.6, 6.1, 6.0 or 5.0 devices (except for Smartphones!) the installation of any component mentioned above (Compact Framework, Microsoft SQL Server Compact Edition, and Mobile@Connector client) starts automatically.*
- *In the case of Smartphones the installation of the components does not start automatically. You will only be informed that the specific component is not installed, and you have to start the process manually. To do it, move to the bottom part of the login site, and click the given link (“Install Compact Framework”, “Install Microsoft SQL Server Compact Edition”, “Install Mobile@Connector client”).*
- *Please reset your devices after installing Compact Framework or Microsoft SQL Server Compact Edition, and be sure that you have at least 25 MB free memory*

Using your mobile application

Starting your mobile application

After the application and your local data are downloaded to your local device, and after you reset your mobile device (**strongly recommended**), you can start using your mobile application. After you go to Programs → M@C the system displays a screen with the list of your applications – just select your application  from the list, and confirm the selection)

Important:

- while downloading your solution for the first time, Mobile@Connector automatically creates an entry in “Favorites” of Pocket Explorer. Even that you will never use Mobile@Connector with Pocket Explorer (it is **not** a browser based solution), never delete the application from the favorite list – if you do it, Mobile@Connector will not be able to use your application (you will have to download it again)



Using the stylus or the finger navigation

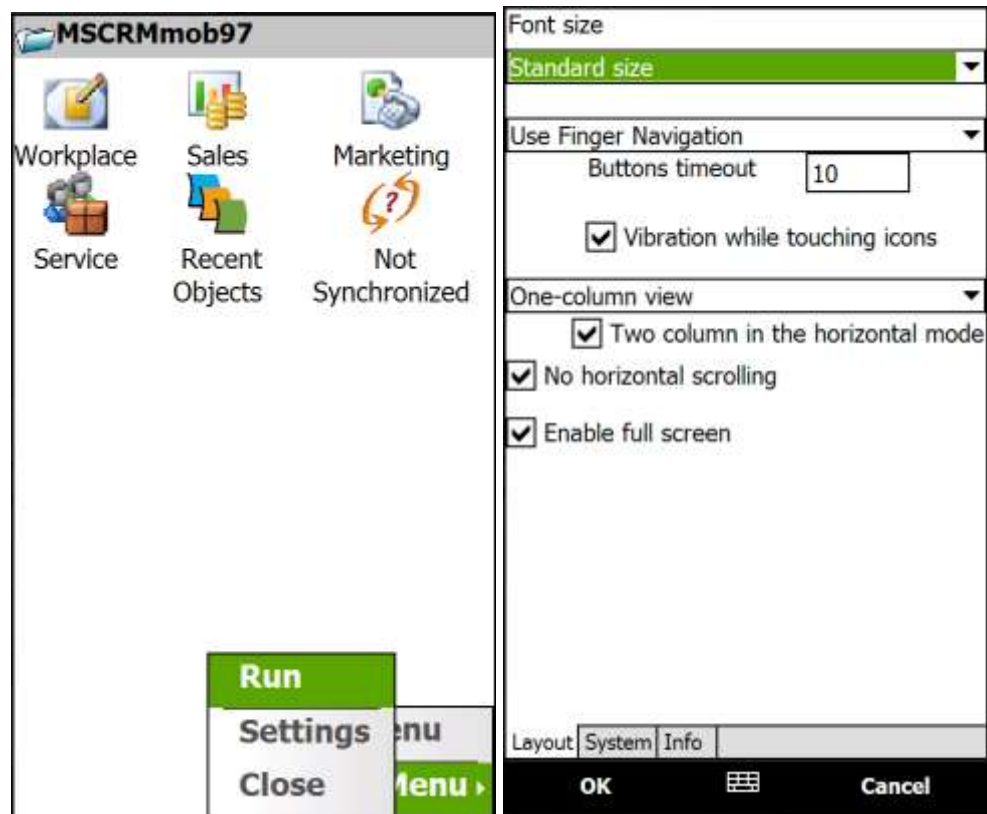
Mobile@Connector enables you to use one of two different navigation modes:

- you can navigate using the traditional toolbar and the stylus
- ... or you can navigate using just finger movements

The finger navigation mode is mostly appreciated by people that mostly read information, and only seldom modify it.

For the people who are mostly entering data, the traditional toolbar mode is usually more preferable.

Which mode you want to use, is fully up to you – you can switch between the modes by going to SystemMenu → Settings.



Using settings you can not only decide which navigation mode you want to use, but you also can make other settings.

This documentation is based on the finger navigation mode – the toolbar navigation is so obvious that, after knowing how to use the system by using the finger navigation, you will probably not need additional description. Nevertheless if you need to, see the chapter [“Stylus navigation”](#).

The second mode (finger navigation) is the default mode, so after your application is started, the system displays information regarding possible finger movements. Please read it carefully.

Important

- **Even if you forget the finger movements, the information screen will always be shown after you make 3 wrong (unrecognizable), consecutive finger gestures.**
- You can also display the information at any time you wish by going to SystemMenu → Settings → Info → “Show finger movements”.

Finger movements

Move your finger (while pressed on the screen):

While in the list view:

in the bottom 80% of the screen:

- show the next items: from the right to the left
- show the previous items: from the left to the right

in the top 20% of the screen:

- show the last items: from the right to the left
- show the first items: from the left to the right
- skip one level higher: from the down upwards
- go to the main site: keep pressed 1 second
- show menu and edit icons: tap the screen

While in the form view:

in the bottom 80% of the screen:

- show the next item: from the right to the left
- show the previous item: from the left to the right







in the top 20% of the screen:

- show the last item: from the right to the left
- show the first item: from the left to the right
- related object(s): from the top downwards
- parental object(s): from the down upwards
- form view ->list view: keep pressed 1 second
- show menu and edit icons: tap the screen

Don't show again

After you close the information page, the system will display the main site of the application. At the beginning, the site will only show the main objects of your CRM system. If you want to see available functions, tap the screen at any **empty** place – then the available icons will appear.

MSCRMmob97

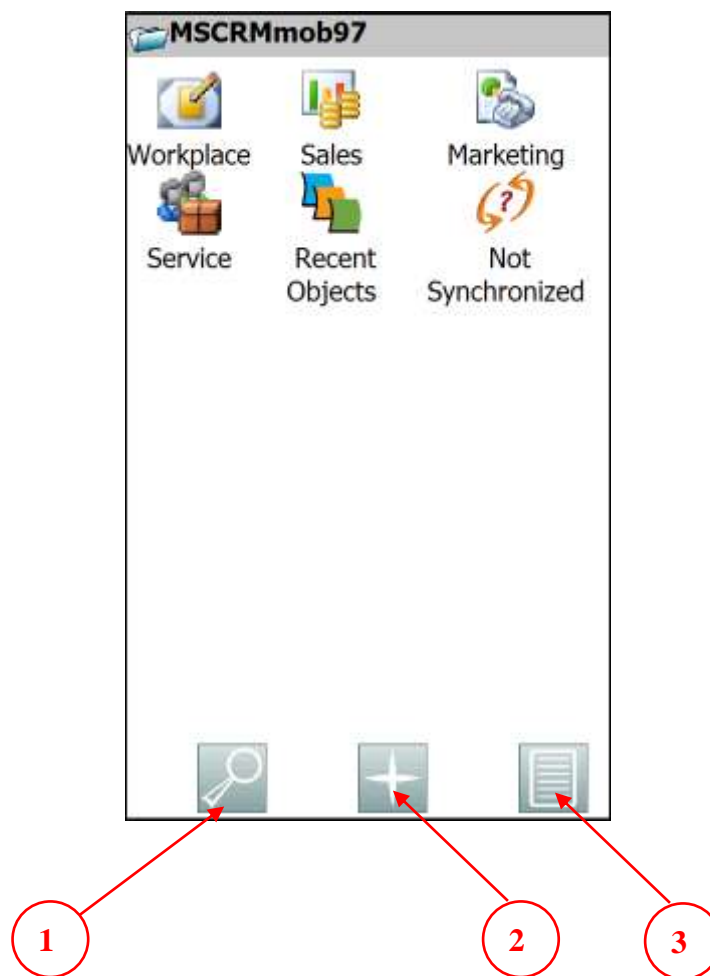
 Workplace	 Sales	 Marketing
 Service	 Recent Objects	 Not Synchronized

Note:

*The icons disappear after 10 seconds of inactivity, so if you cannot see them, just tap the screen with your finger at any **empty** place.*

The finger navigation has several advantages:

- The data can be displayed on the whole screen – there is no toolbar requiring the screen place. Even if, in some situations, icons appear (and disappear after 10 seconds of inactivity), they are translucent, so they do not cover data
- You can work using just one hand



- 1 – Fast search**
- 2 – Add new object**
- 3 - Menu**

You can now navigate through the application structure (you can find more information in the next chapters), but you also have possibilities to use two functions represented by two icons on the screen – “**Fast search**” and “**Add new object**”.

Fast search

Using this function, you can find records from any object types (Leads, Accounts, Orders, etc.), containing searched text in specific text fields.

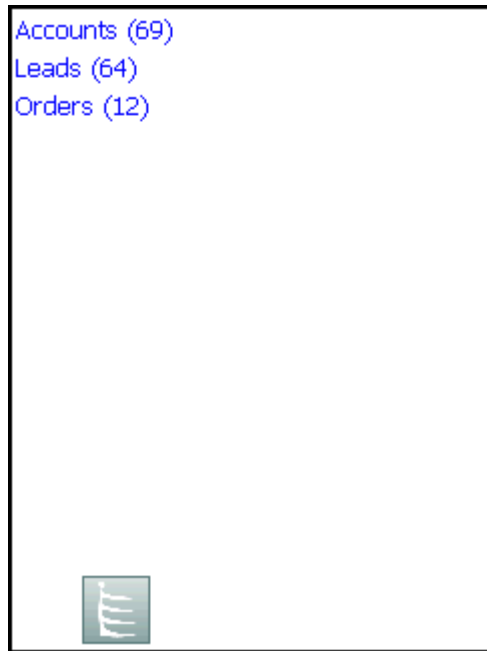
Which fields of specific objects have to be searched through is defined in your MS Dynamics CRM implementation – the mobile solution is based on these settings.

If you tap this button, the system displays a screen where you can enter the searched text. It also displays the list of all objects' types of your Microsoft Dynamics CRM, and lets you decide which objects should be searched through.

bike	
OK	Cancel
<input checked="" type="checkbox"/>	Accounts
<input type="checkbox"/>	Campaigns
<input type="checkbox"/>	Cases
<input type="checkbox"/>	Competitors
<input type="checkbox"/>	Contacts
<input type="checkbox"/>	Contracts
<input type="checkbox"/>	Invoices
<input checked="" type="checkbox"/>	Leads
<input type="checkbox"/>	Marketing Lists
<input type="checkbox"/>	Opportunities
<input checked="" type="checkbox"/>	Orders
<input type="checkbox"/>	Products
<input type="checkbox"/>	Quick Campaigns
OK	Cancel

Enter, for example, “bike” as a search criterion, and mark the following objects - „Accounts”, „Leads”, and „Orders”. Thereafter press the **OK** button.

After a while, the system will display a screen with information of how many records of the given type have been found.




Now tap the object you are interested in, and the system will display all records of the given objects that contain the searched word. If you click, for example, **Accounts**, you will see following screen.



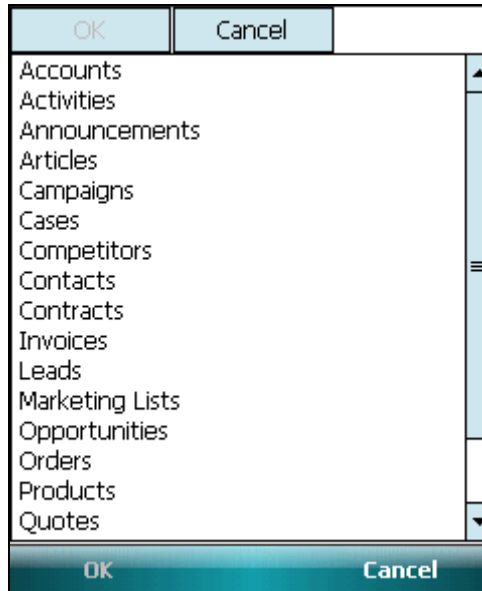
Important:



- The search icon mentioned above () behaves differently if used in different parts of your mobile solution. For more information see the chapter related to searching
- You can search data while using more sophisticated methods. For more information see the chapter related to searching.

Adding a new object

Using this function, you can add new records very fast and easily (Lead, Account, Order, etc.). If you push this button, the system displays a screen where you can select the desired object.



If you select, for example, "Leads", the system displays, after a few seconds, a screen allowing you to register a new lead.



1

1 - Save

2

2 - Cancel

After you enter the necessary information, push the **“Save”** button. The system will ask you to confirm saving the new record and displays the newly added record in the form view.

Recent objects

At the main site of your mobile solution you can see, additional to your typical objects from your large CRM, two additional objects: “Recent objects” and “Not synchronized”.

Using the “Recent objects” function, you can easily switch to one of the last visited objects. “Recent objects” contains the list of 10 objects you recently “visited”.

Not synchronized

Using the “Not synchronized” function, you can see the list of all objects which are not synchronized yet with the server. It contains objects that were edited, added, or deleted locally. The icons at the individual objects in the list represent the operations which were performed at them (edition, new object, deleted object).

You always can switch to the individual objects and modify the performed operation (of course, only as long as you not synchronize the changes with the server).

Information regarding smartphones

If you run the solution on a smartphone (Windows Mobile Standard – device without a stylus), you cannot use the finger navigation described in this document. Mobile@Connector recognizes such devices automatically, and – also automatically – switches to the “traditional” navigation. The “traditional” navigation means in case of a “Pocket PC” (Windows Mobile Professional or Classic) navigation with a stylus. Smartphones use same kind of navigation but because they don’t support stylus, you have to navigate using the smartphone’s keyboard or joystick.

When you use the “standard” stylus navigation, the system displays a toolbar with a set of icons which – when pressed - start appropriate functions. The toolbar is located at the bottom part of the screen, and – if you need to call a function – you just click the appropriate icon with the stylus. Because smartphones don’t have stylus, you use joystick to navigate – when you use the joystick the cursor moves within the smartphones main screen, and never goes outside of it. So the question is: how to move the cursor to the toolbar?

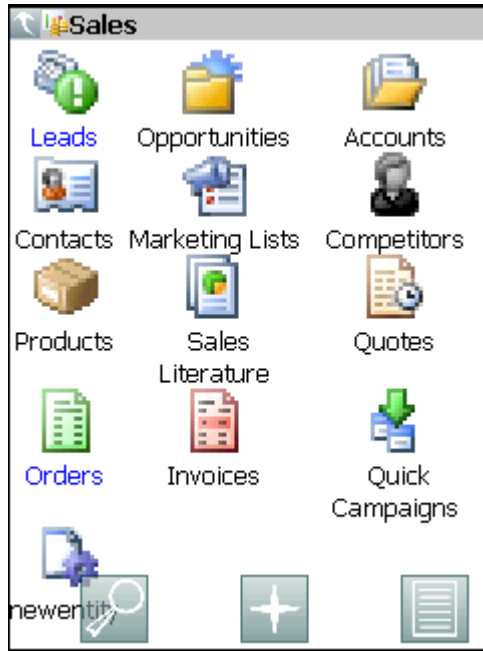
Toolbar



Press to move the cursor to the toolbar

To move the cursor from the main screen to the toolbar, you have to press the left system button of the smartphone. After you do it, the cursor will move to the toolbar, and you can move it within the toolbar to the left or right. If you want to move the cursor back to the main screen, just move the cursor up. To bring him back to the toolbar press the left system button again.

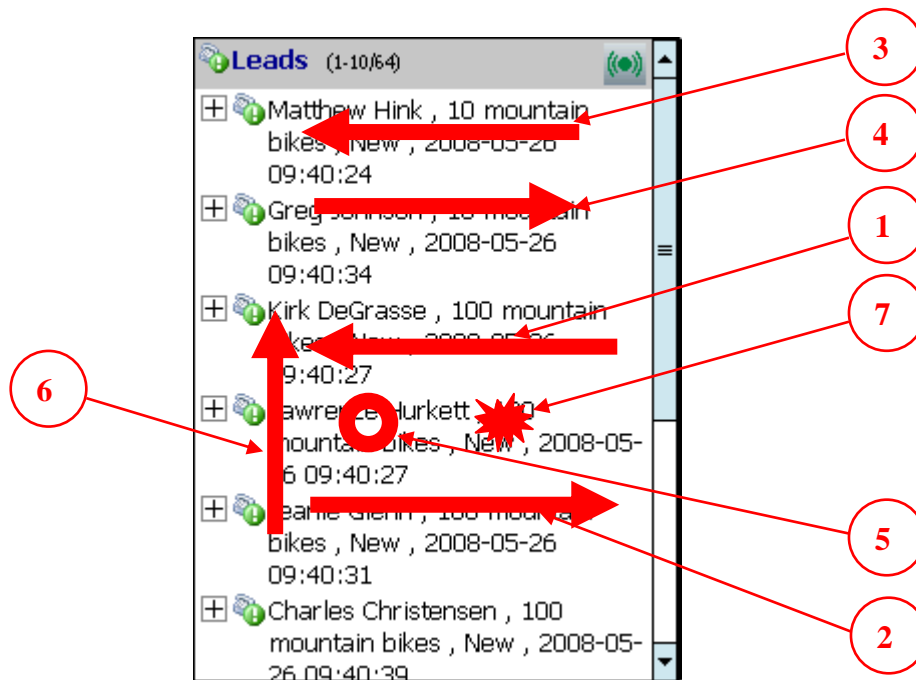
Navigating your mobile application



If you want to see list of records of a specific objects (for example leads), just tap the icon. The system displays at one site 10 records (you can modify it in settings).

List view

Possible finger movements in the list view

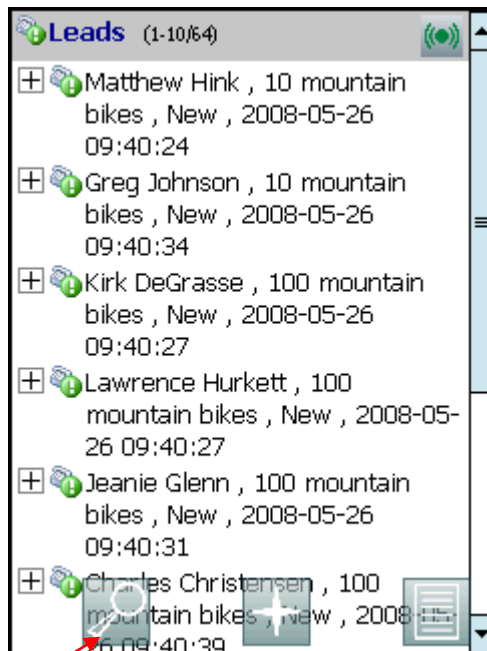


1. if you want to go to the next 10 records, move your finger from the right to the left (use the bottom part of the screen – do not use the top 25%)
2. if you want to go to the previous 10 records, move your finger from the right to the left (use the bottom part of the screen – do not use the top 25%)
3. if you want to go to the first 10 records, move your finger from the left to the right, but use for it the top 25% part of the screen
4. if you want to go to the last 10 records, move your finger from the right to the left, but use for it the top 25% part of the screen
5. to see additional icons, tap the screen at any empty place
6. to skip to a level higher, move your finger from the down upwards
7. to come back to the main site, keep your finger pressed on the screen for at least one second

In the case of the finger movement from the point 6, the system will skip one level up in the structure. In the case of the finger movement from the point 7, it will always skip to the main site of the application. In our example, using any of the options will cause the same effect: you will be back at the main site.

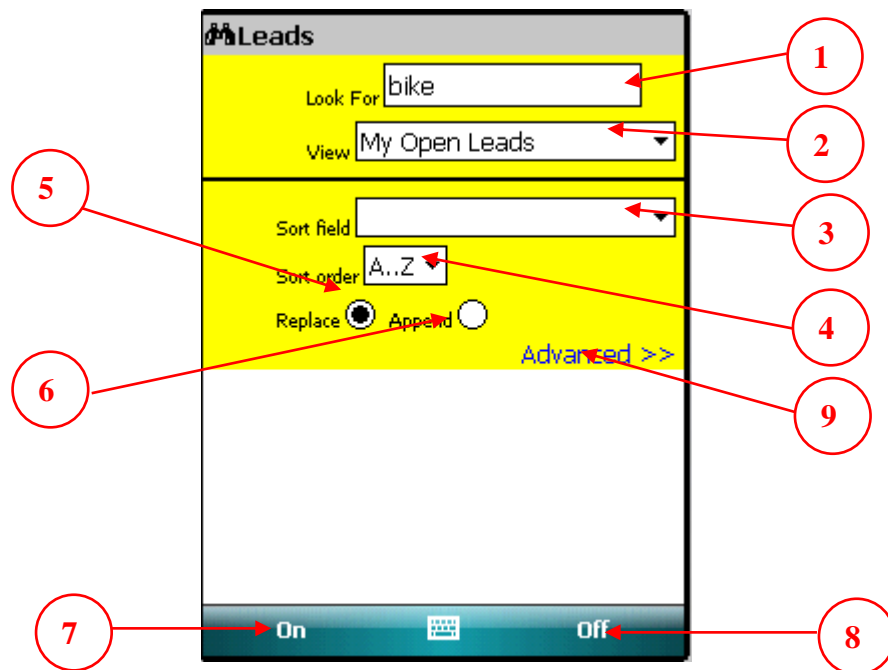
Search

The same search icon that you already used for searching through several objects, behaves differently when you are in the list view: it allows you to search through just one (current) object type.



Search icon

*Note: remember: if you do not see the search icon, just tap your screen at any **empty** place.*

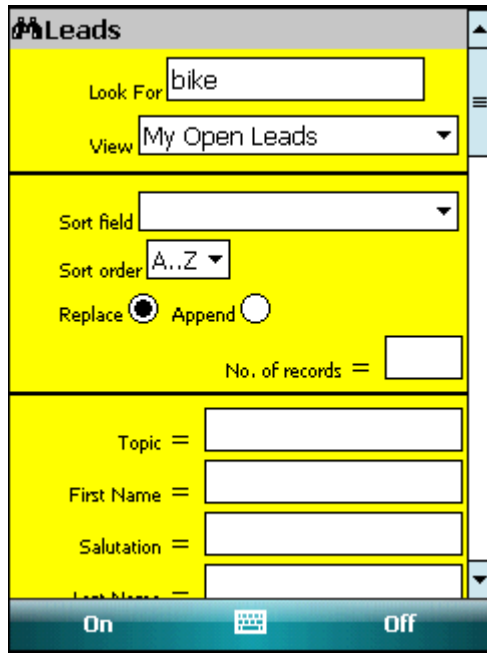


The elements on the screen above have the following functions:

1. **Searched text**
You can enter here the text to be searched. The system will look for all Leads containing this text in specific text fields at any place. Which fields have to be searched through is defined in your MS Dynamics CRM implementation – the mobile solution automatically uses these settings.
2. **View**
If there are views defined for the given object in your Microsoft CRM implementation, you will be able to select the desired view from the views' list
3. **Sort field**
You can select a field to be used for sorting the records
4. **Sort order**
You can decide if the records will be sorted in ascending or descending order
5. **“Replace” radio box**
If it is set to on, the new loaded data will replace the former data on the screen of your mobile device (you will see only the new data – the “old” data will disappear)
6. **“Append” radio box**
If it is set to on, the new loaded data will be added to the data displayed on your screen previously (you will see the former and the new data)
7. **“On” button – searching with the filter**
The system searches for the data using the filter definition.
8. **“Off” button – displaying data ignoring the filter**
The system will display data IGNORING the filter definition.

9. Advanced

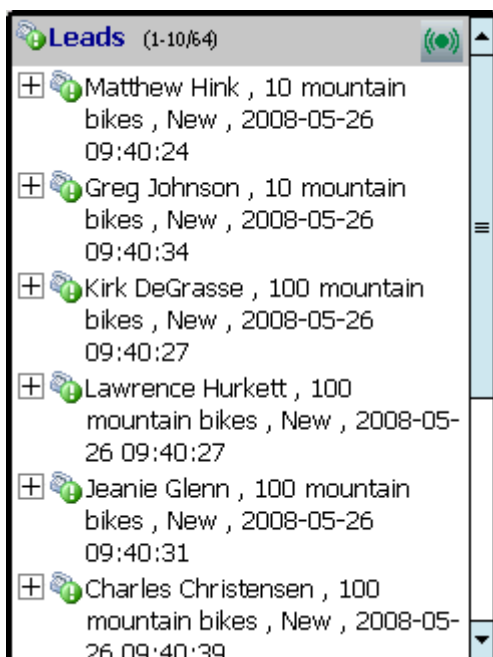
It allows you to use more sophisticated search criteria – you can enter search criteria which have to be searched in specific fields



Note:

There is a difference between entering search criteria in the “Look for” field and in the specific fields in the “Advanced” option:

- *If you enter “bike” in the “Look for” field, the system will, for example, find records with fields containing the sentence “5 bikes ordered”*
- *To find it using the “Advanced” option, you will need to enter as the search criterion “*bike*” instead.*



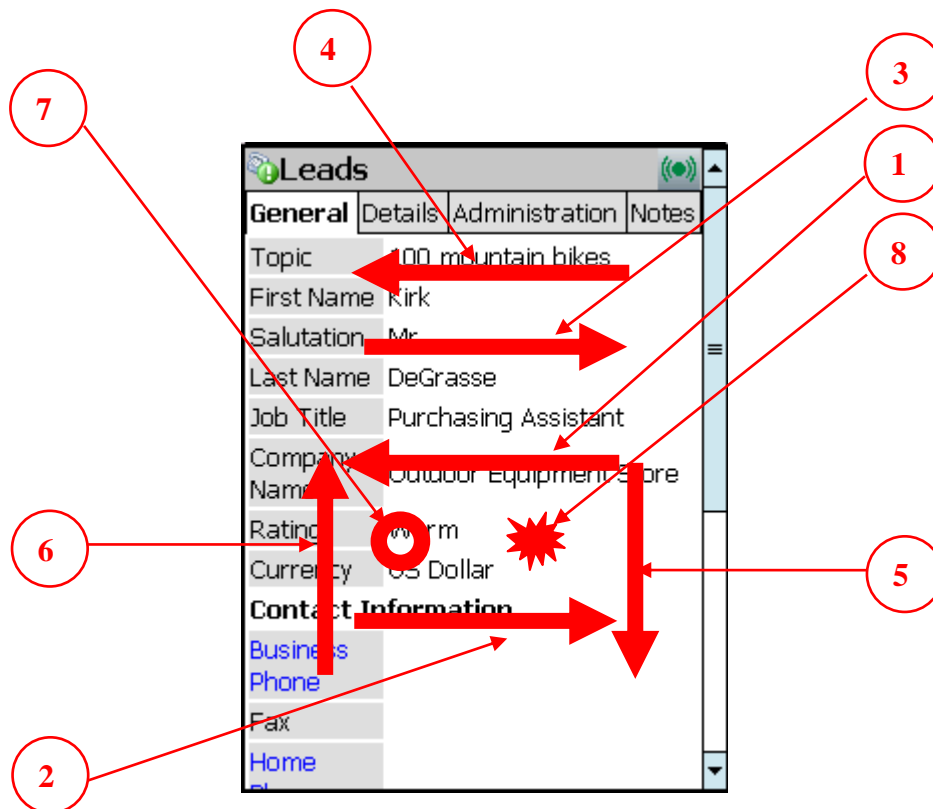
Note:

As you can see in the above screen, the names of the filtered objects (“Leads” in this case), are presented with the blue color (all other objects are presented in black). So you can directly see that items contained in such objects are filtered (not all items appear but just the filtered ones). If you want to see all items again you have to go to the filter and push the “Off” button.

Form view

If you want to see the detailed information regarding a lead (or any other object) just tap the item – the system will switch to the form view.

Possible finger movements in the form view

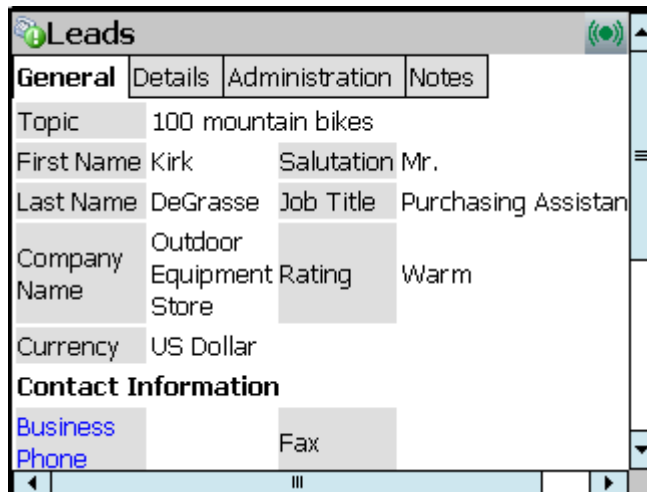


Possible finger movements in the form view:

1. if you want to go to the next item, move your finger from the right to the left (use the bottom part of the screen – do not use the top 25%)
2. if you want to go to previous item, move your finger from the right to the left (use the bottom part of the screen – do not use the top 25%)
3. if you want to go to the first item, move your finger from the left to the right, but use for it the top 25% part of the screen
4. if you want to go to the last item, move your finger from the right to the left, but use for it the top 25% part of the screen
5. to see related objects, move your finger from the top downwards
6. to switch to the parental object, move your finger from the bottom upwards
7. to come back to the list view, keep your finger pressed on the screen for at least one second
8. to see additional icons, tap the screen at any empty place

As you can see, the system displays data in one column, which usually makes more sense considering the small screen of mobile devices.

Nevertheless, if you switch to the horizontal mode, the data will be displayed in two columns – exactly as in your “large” MS Dynamics CRM..



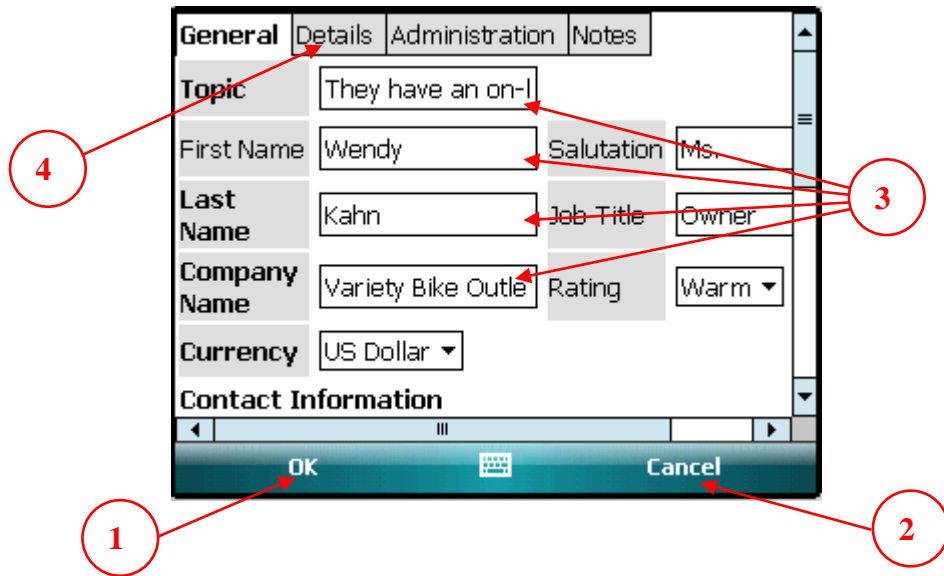
Note:
You can change it by changing your settings in SystemMenu → Settings.

If you want to come back to the list view, just keep your finger pressed on the screen for at least one second (movement 7).

Editing data



If you want to edit a record, use the edit icon.



The elements in the screen above have following functions:

1. **Save**
If you press this icon, all the changes you have made will be saved (locally)
2. **Cancel**
If you press this icon, all your changes will be ignored (not saved)
3. **Fields of the current form**
4. **Tabs**
Using it you can switch between specific parts or the form

Deleting data

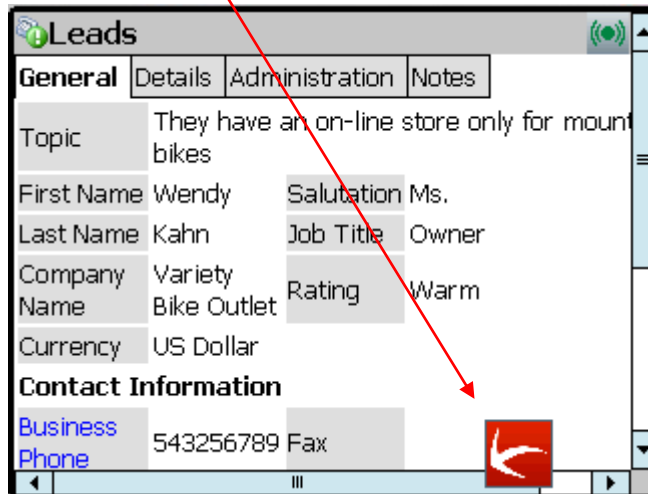


If you want to delete a record, use the delete icon.

Cancelling changes before synchronization

Remember, that all your changes are stored only locally – they will be sent to the server only during synchronization.

As long as you do not synchronize them, you can always change your mind, and cancel the operation by using the cancellation icon.



Synchronization

The synchronization can be divided into two parts:

- sending the local changes to the server
- searching for possible changes made on the Microsoft Dynamics CRM server, and downloading them to your mobile device

Sending the local changes to the server (“synchronization”)

All the local changes are sent to the server in small packages. If there is a conflict, the system shows the objects for which the conflict occurred with the proper information (all other records – with no conflict – will be sent to the server).

Example of a conflict: you changed/deleted an object (record), but before you sent the changes to the server, another person changed/deleted that object (record) on the server. As a result the object you are sending to the server does not exist. In such a situation the system refuses to update the record and displays a proper message, proposing deleting the record locally.

Searching for possible changes done on the server (“actualization”)

The system searches for possible changes done on the server:

- records which have been deleted
- records which have been added
- records which have been modified

... and downloads the changes to the local device:

- the records deleted on the server are deleted locally
- the added records are added to the local device
- the modified records replace the old records

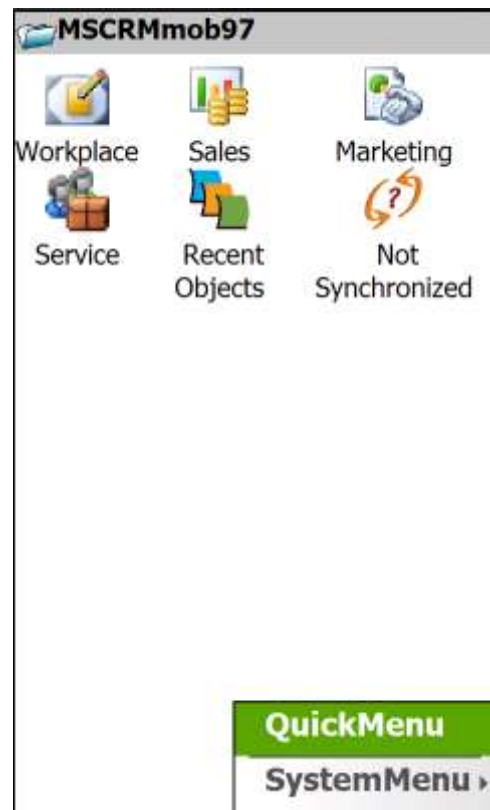
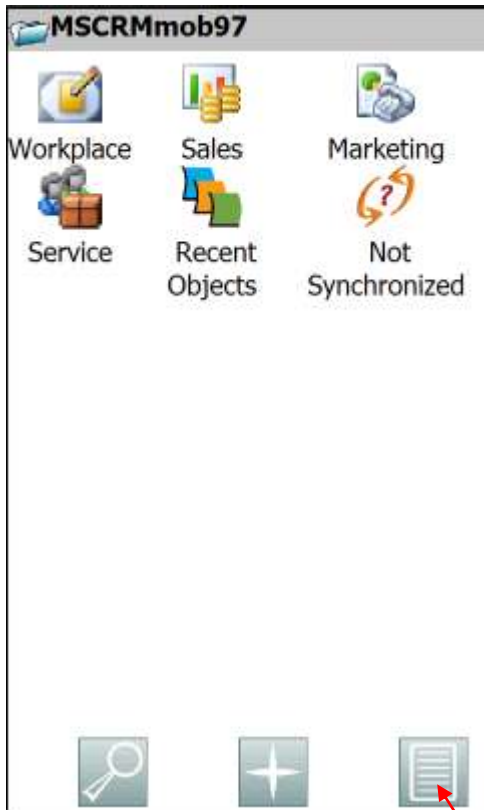
Important: in the case of “deleted records” and “added records” the system not only looks for the records which have really been deleted/added but it also looks for records which do not fit to the specification of the local data anymore.

Example:

If you have specified that your local database should contain your appointments from the last 30 days, then any time you synchronize, the system also checks for appointments which are older than 30 days and deletes such records from your local database. It also automatically adds all new appointments. As a result you will have on your local device only the newest leads from the last 30 days.

Starting synchronization

You can start synchronization at any time you wish by just going to SystemMenu → Quick menu → Synchronization.



Menu



Important:

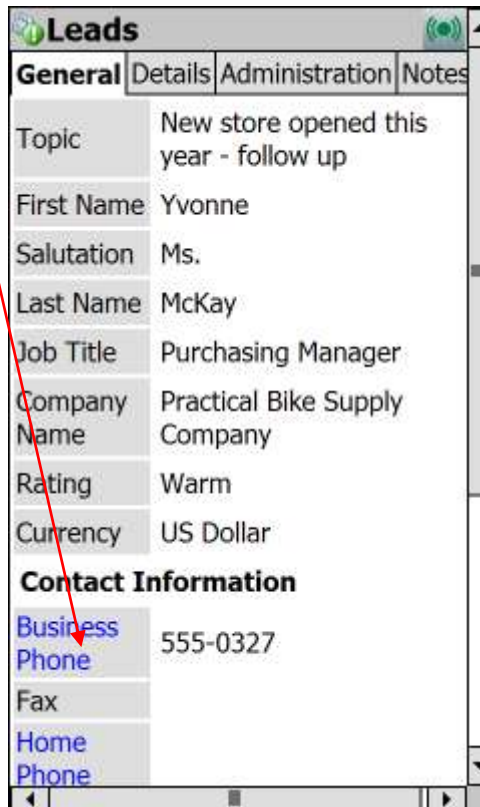
- You can directly see at the “Synchronization” button, how many records are not synchronized yet
- If the “bidirectional” option is checked, the system will not only synchronize the data but also actualize it (see the above description). If you only want to synchronize your local changes with your CRM server, and you not have time for waiting for the actualization, please uncheck the “bidirectional” option before pressing the “Synchronization” button

Additional functionality

Placing a call

If you are working with your mobile application, and you want to call a person whose number is registered in your MS Dynamics CRM, just do the following:

- find the object (Account, Contact, Lead)
- find the phone number on the screen
- click the link



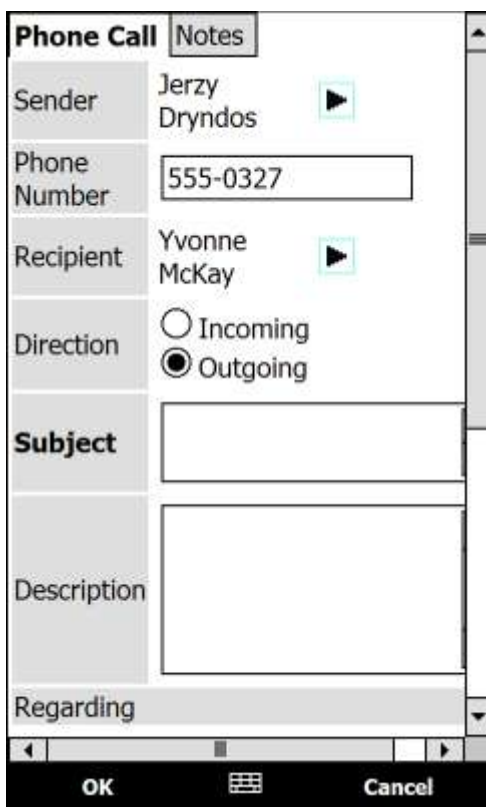
Leads	
General	Details Administration Notes
Topic	New store opened this year - follow up
First Name	Yvonne
Salutation	Ms.
Last Name	McKay
Job Title	Purchasing Manager
Company Name	Practical Bike Supply Company
Rating	Warm
Currency	US Dollar
Contact Information	
Business Phone	555-0327
Fax	
Home Phone	

At this moment, your mobile device will start dialing the number.

When you finish your phone call, and switch back to your mobile application, you will see the following screen – just confirm the question.



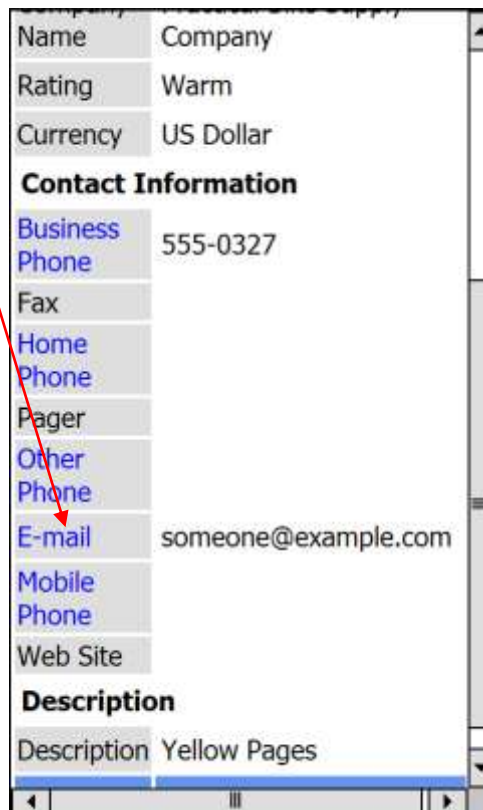
Within a few seconds, the system will create a new task that will already be filled out with the necessary data. Just enter the information about the call made, modify some values if necessary (for example the call duration, or associations with other objects), and save the task.



Placing an email

If you are working with your mobile application, and you want to send an email to a person whose email address is registered in your MS Dynamics CRM, just do following:

- find the object (Account, Contact, Lead)
- find the email address on the screen
- click the link



Within a few seconds, the system will create a new task that will already be filled out with the necessary data. Just enter the topic and text of your email, modify, or extend some values if necessary (for example select additional persons for cc, or modify associations with other objects), and save the task.

Important:

After you do it, do not forget to answer the question "Send the email?!" If you forget to do it, select the "Send email" option from the menu.

E-mail Attachments

From Jerzy Dryndos ▶

Cc ▶

To Yvonne McKay ▶

Bcc ▶

Subject

Description

Regarding

Lead : Yvonne McKay

OK Cancel

Your email will be sent after you synchronize your data.

Integration with Pocket Calendar and Tasks Manager

General information

There are well known ways of integrating Microsoft Dynamics CRM objects like appointments, service activities, or tasks with appropriate objects from Microsoft Outlook or Pocket Outlook. **If you are using one of these methods, the only useful information in this chapter for you is: do not use the integration option offered by Logotec's service! If you turn on this option, then all your events and tasks will appear twice.**

Nevertheless, there are several people who do not use these methods of integration between Microsoft Dynamics CRM and Microsoft Outlook Calendar or Tasks Manager. Even more people do not use such integration with Pocket Calendar or Task Manager, due to specific difficulties and limitations of such methods.

For all such people, the fully automatic and very sophisticated integration offered by Logotec's service can be a very useful option.

There are the following Microsoft Dynamics CRM objects that can be integrated with Pocket Outlook while using Logotec's service:

- tasks – can be integrated with Pocket Tasks Manager
- appointments – can be integrated with Pocket Calendar
- service activities – can be integrated with Pocket Calendar

You can decide to integrate all of the objects, or just the selected ones.

If you turn on the integration option, you can access tasks, appointments, and service activities in two different ways:

- by using your mobile application exactly as in the case of any other objects
- ..., or by using the standard Pocket PC applications: Pocket Calendar and Tasks Manager instead

As known, Pocket Calendar and Tasks Manager do not offer this range of functionality that is used in Microsoft Dynamics CRM, but if you use the integration, their functionality will be extended to this range. It is possible because the integration option extends respectively the functionality of Microsoft Pocket Calendar and Tasks Manager.

For example, while creating an event in Pocket Calendar you not only can enter the standard data of a Pocket Calendar event, but can also enter additional data, as is usual in the case of Microsoft Dynamics CRM appointments or service activities. You can also associate an event with several other objects – exactly as in Microsoft Dynamics CRM.

This functionality is not a functionality offered by Pocket Calendar, but an extended functionality offered by the integration option.

To be able to differentiate between the Microsoft Dynamics CRM events/tasks and other events, all Microsoft Dynamics CRM events and tasks have the assigned category “**MSCRM**”. When you download the local data for the first time, the system:

- Deletes all events with the “**MSCRM**” category from your Pocket Calendar and Task Manager
- Inserts all Microsoft Dynamics CRM events and tasks (actually: appointments, service activities, and tasks) into your Pocket Calendar/Tasks Manager, and sets their category to “**MSCRM**”

Managing MS Dynamics CRM appointments, service activities, and tasks in Pocket Calendar/Tasks Manager

You do not need to do anything specific to be able to use Pocket Calendar/Tasks Manager for managing your Microsoft Dynamics CRM appointments, service activities, and tasks. The process is fully automatic. The only thing you need is to turn on the option while registering (defining the functionality) on Logotec's service. As explained above, after your mobile application and local data are downloaded, you can find the objects in your Pocket Calendar and Task Manager with the proper category "**MSCRM**" assigned.

Important information concerning Events and Tasks

In the case of Events and Tasks, the system behaves in the following way: You will be able to work with your OWN events and tasks using the standard Calendar and Task applications included in your Pocket PC. Even if you included in your local database ALL events and tasks you have permission to access, you will see only YOUR data there. If you want to see all data (and not only your own) you can use the objects Events and Tasks in your mobile application. Probably you will have events and tasks stored in your Pocket PC BEFORE you start using Mobile@Connector - it is important to understand how Mobile@Connector will treat them:

- when you download the local data to your Pocket PC device, Mobile@Connector loads events and tasks to your Pocket PC Calendar/Task Manager the category of all the events/tasks will be set automatically to "MSCRM".
- before doing it the system deletes ALL events/task stored in your Calendar/Task Manager which have the category "MSCRM" (which means that if you have any events/task with a category different from "MSCRM" they will be not deleted).
- if you want to register a new event/task which should be synchronized with your Microsoft Dynamics CRM account, please do not forget to put the category to "MSCRM".
- if you already have a category/categories set to this event, add an additional category "MSCRM".
- remember that only events/task with category "MSCRM" will be synchronized with your Microsoft Dynamics CRM account.

Creating a new event (appointment/service activity)

To create a new Microsoft Dynamics CRM appointment while using Pocket Calendar, simply do exactly as you would to create any other event. There are only two differences:

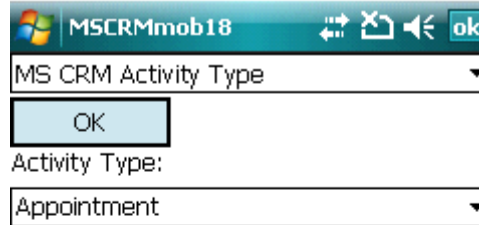
- Do not define attendees
- Do not forget to set the events category to "**MSCRM**"

The screenshot shows a 'Calendar' application window with the following fields and values:

- Subject: Meeting with the sal... (dropdown)
- Location: Denver (dropdown)
- Starts: 6/11/07 1:30 PM
- Ends: 6/11/07 4:30 PM
- All Day: No
- Occurs: Once
- Reminder: Remind me
- 15 minute(s)
- Categories: MSCRM (text input)
- Attendees: No attendees... (text input)
- Status: Busy
- Sensitivity: Normal

At the bottom, there are tabs for 'Appointment' and 'Notes', and a 'Menu' button.

After you save the event, the system displays an additional window that will allow you to associate your event with additional, MS Dynamics CRM specific objects.

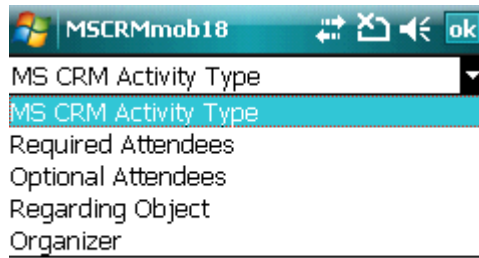


Important:

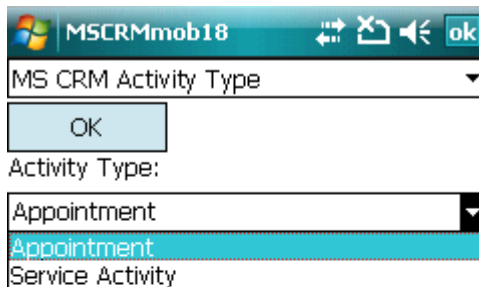
If you do it for the first time, it will take about 10-15 seconds before the window appears – so be patient. This period will only be about 3-5 seconds when you use the function for the next time.

You can see two drop-down lists:

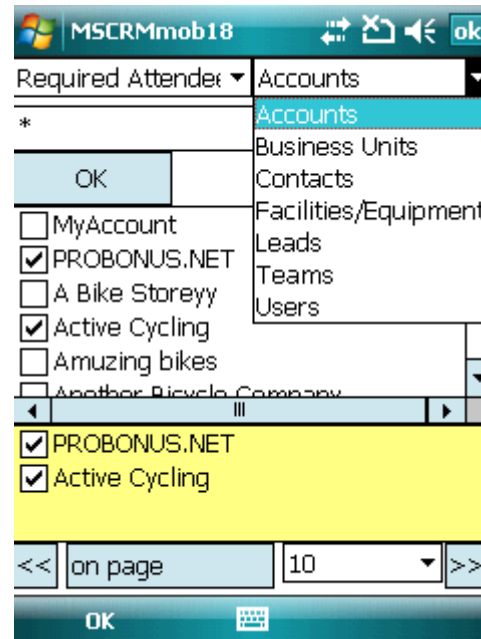
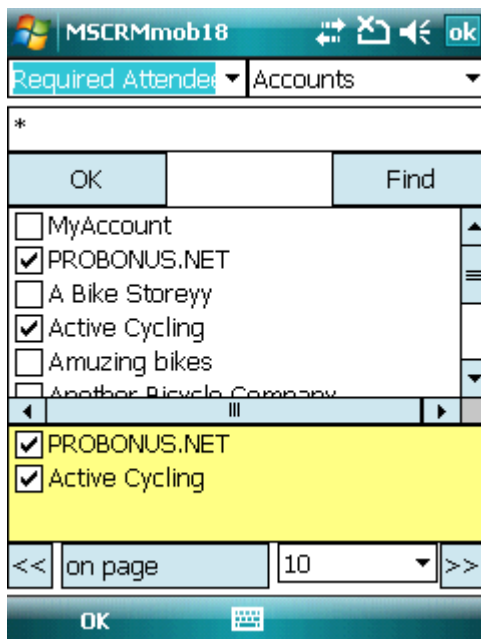
The first one, located at the top, lets you decide which object type you select to associate with. By default the list looks as follows:



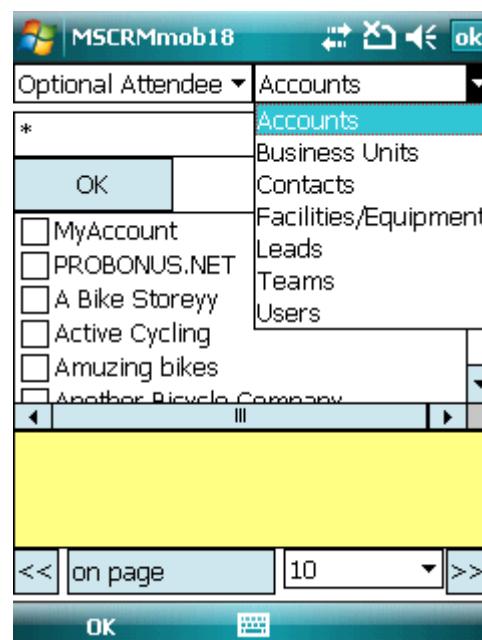
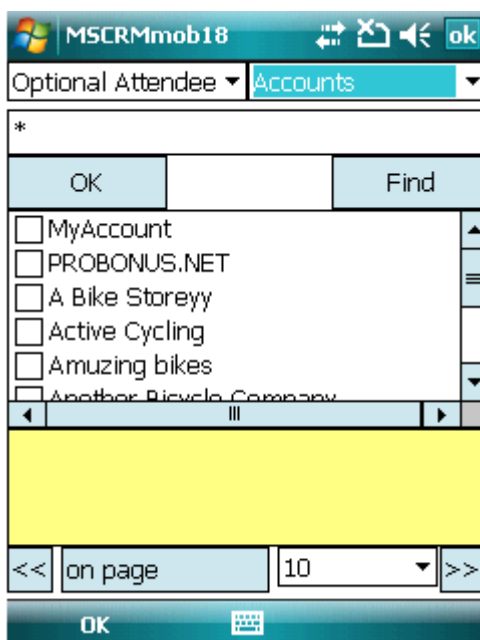
The first position lets you decide whether this event should represent an appointment (it so happens by default), or a service activity in Microsoft Dynamics CRM. You can do it by selecting the specific option from the bottom drop-down list



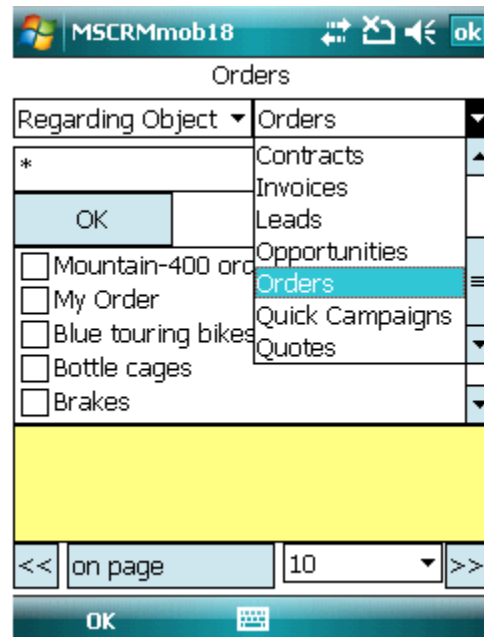
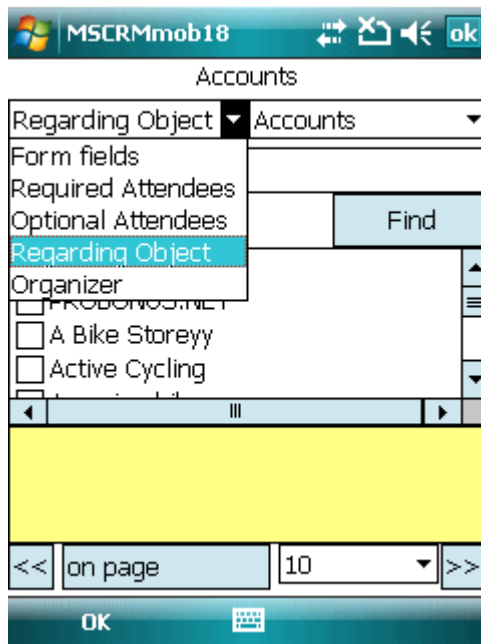
If you select the “Required Attendees” option from the drop-down list located on the top, you will be able to select the required attendees from objects like Accounts, Business Units, etc. (see the right screen shot below).



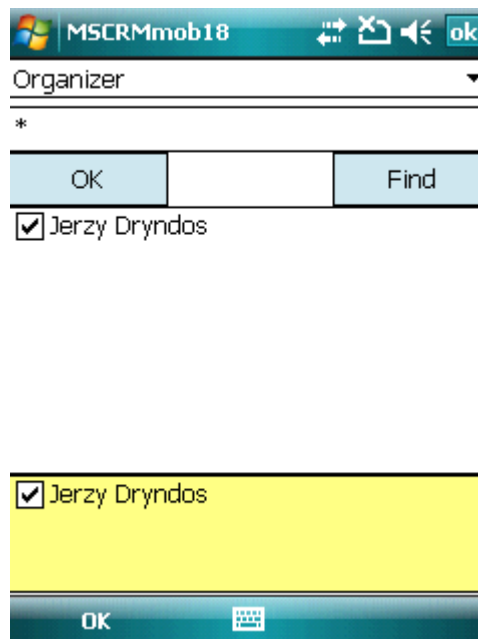
If you select the “Optional Attendees” option from the drop-down list located on the top, you will be able to select the optional attendees from objects like Accounts, Business Units, etc. (see the right screen shot below).



If you select the “Regarding Object” option from the drop-down list located on the top, you will be able to associate the regarding object with objects like Contracts, Invoices, Orders, etc. (see the right screenshot below).

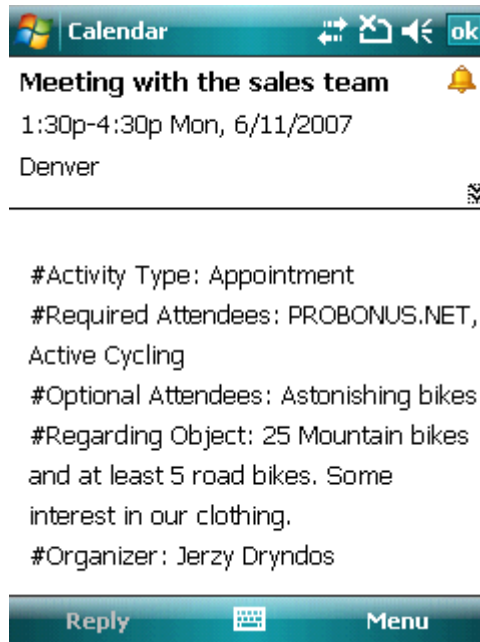


If you select the “Organizer” option from the drop-down list located on the top, you will be able to select the organizer.



As you already know from MS Dynamics CRM, some of the values are obligatory, some just optional, in the case of some of them you can select only one value, whereas in the case of other ones you can select several values. All this functions exactly like in the “large” MS Dynamics CRM.

After you associate all the objects you wish to associate and push the OK button, the system saves the associations to the MS Dynamics CRM local database and also writes some information into your Pocket Calendar event. Thereafter the window will be closed and you return to the screen representing your event in the Pocket Calendar.

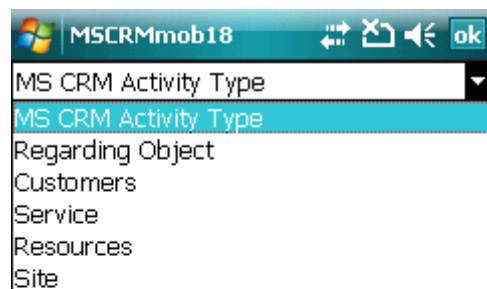
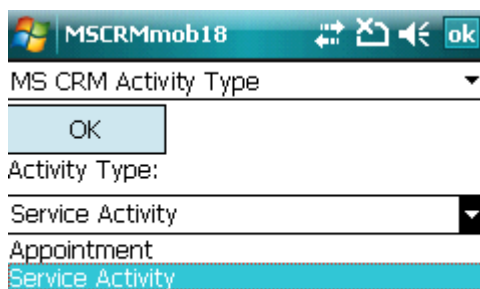


As you can see, the system added to the Notes of your event information about the associations you have made.

Important:

This information is inserted into the event only for your convenience. The actual information about the association between the event and other objects, are saved in the local database. If you delete/modify the information in the notes, it will not influence the actual association.

The above description uses the “Appointment” case as an example but you can work in the same way also in the “Service activity” case. If you select from the drop-down list “Service Activity” instead of “Appointment” you will be able to associate your event with different objects specific for Service Activities but the way to do it is very similar.



According to your decision the window will also offer you appropriate possibilities - different ones for an appointment, and different ones in the case of service activities - to associate the object with other Microsoft Dynamics CRM objects.

Editing an event

If you change an event using the Pocket Calendar, the system will open the same window as if you would be creating a new event. The only difference is that the window already contains information about the associations with other objects.

Important:

If you only want to change the associations, you still have to change something in your event because it is the only way to start the association panel. If you need it just "temporarily", change anything in the Pocket Calendar event (for example put an additional space character in the event title). This will cause the system to display the window showing the associations, at which time you will be able to see or change them.

Working with tasks

The integration of MS Dynamics tasks with Pocket Task Manager works in exactly same way as the integration with Pocket Calendar.

Additional information

If you create/modify an event using the standard forms of your mobile application, and not the Pocket Calendar, all changes will be directly pushed to the Pocket Calendar. Once you switch to Pocket Calendar, you will be able to see the changes.

If you create/modify an event with the Pocket Calendar, all changes will be directly pushed to the local database. In order to see the changes in your mobile application, you have to "refresh" the events. This forces your mobile application to select the newest data from the local database.

Re-customizing your application

After using your mobile application for a while, you can change your mind – maybe you come to the conclusion that including or removing additional objects, functionality or records would make more sense.

Same situation can happen if you modify your large MS Dynamics CRM, and you would like to be sure that your mobile application reflects the changes.

In both situations you need the possibility to re-customize your application.

Important:

If you customize your Microsoft Dynamics CRM account AFTER your mobile application is created, you will have to “force” the system to re-create your application again. Do not forget to synchronize all your local handheld data to the server BEFORE making such changes in Microsoft Dynamics CRM (or you can lose your changes at your handheld local data). You can re-create your mobile application using your customization site (the URL of your customization site will be contained in the email informing you about your account).

How to re-customize your application?

You can re-customize your application (including the content of your local database) by accessing your individual customization site. The link to that site is contained in the email which you will receive after registering for an account (either the trial or the real account).

Note:

- **the customization is not enabled for the demonstration – demo – account**
- **the customization is very limited for the trial version. For the trial account, the service uses default settings – you only can select which module should be mobilized (Sales, Service, etc.).**

If you access your customization site, you will have to login to the service. You will have to enter not only your Microsoft Dynamics CRM credential, but also the Access Key and Access Password sent to you after registering by email.

*MS CRM user name

*MS CRM user password

*Server address

*Access key

*Access password

Adapter type

MS CRM Online

MS CRM 4 On-Premise

MS CRM 4 Partner-Hosted (IFD)

MS CRM 3

Note:

To access your customization site, click the link in your notification email. If you do it, the fields “Access key” and “Access password” will be filled-in automatically. If you don’t click the link but copy it and enter in a browser yourself, you will need to enter “Access key” and “Access password” manually.

After you log in, the system will display, after a while, the name of your application. You will have 3 possibilities:

- to modify your former mobile solution (useful, if you just want to make some modifications like including an additional object into your mobile application, removing an objects, or changing the rules for the to-be-downloaded data
- to delete the solution
- to create a new solution

After you make your decision, you will have to wait for a few minutes – thereafter the system will display a site containing the structure of your “large” MS Dynamics CRM application.

- If you decided to modify your former mobile solution, you will see your former definition and you will be able to modify it.
- If you decided to create a new solution, you will see the structure of your MS Dynamics CRM account with the default service’s settings

Now you will be able to re-define (or define – on case of a new solution) your mobile application in the same way as doing it for the first time (see the chapter [“Customizing your application”](#)).

Important:

You can change the parameters of your application in two ways:

- a) You change object(s) which should be included in your application (you include or exclude an object - the first column). In this case the system has to generate a new version of your application. You will be forced to download the new version of your application and the local data as well.

Note:

In this case, your newly defined data set will be downloaded. Due to this mandatory download, PLEASE synchronize your data BEFORE changing the parameters of your local data (if you forget this, you will lose your local changes you made on your handheld unit that you have not already synchronized).

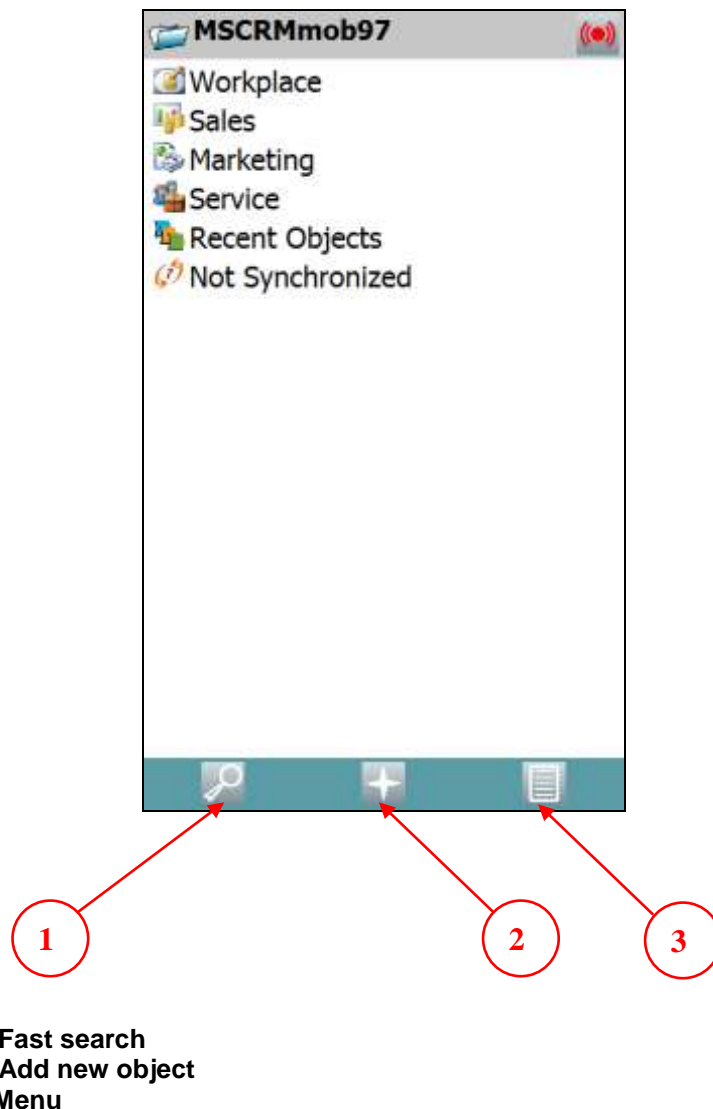
- b) You change only the amount of records in the objects. In this case it is not necessary to do anything – the system will make any changes automatically while synchronizing the data – removed data will be removed, added data will be added.

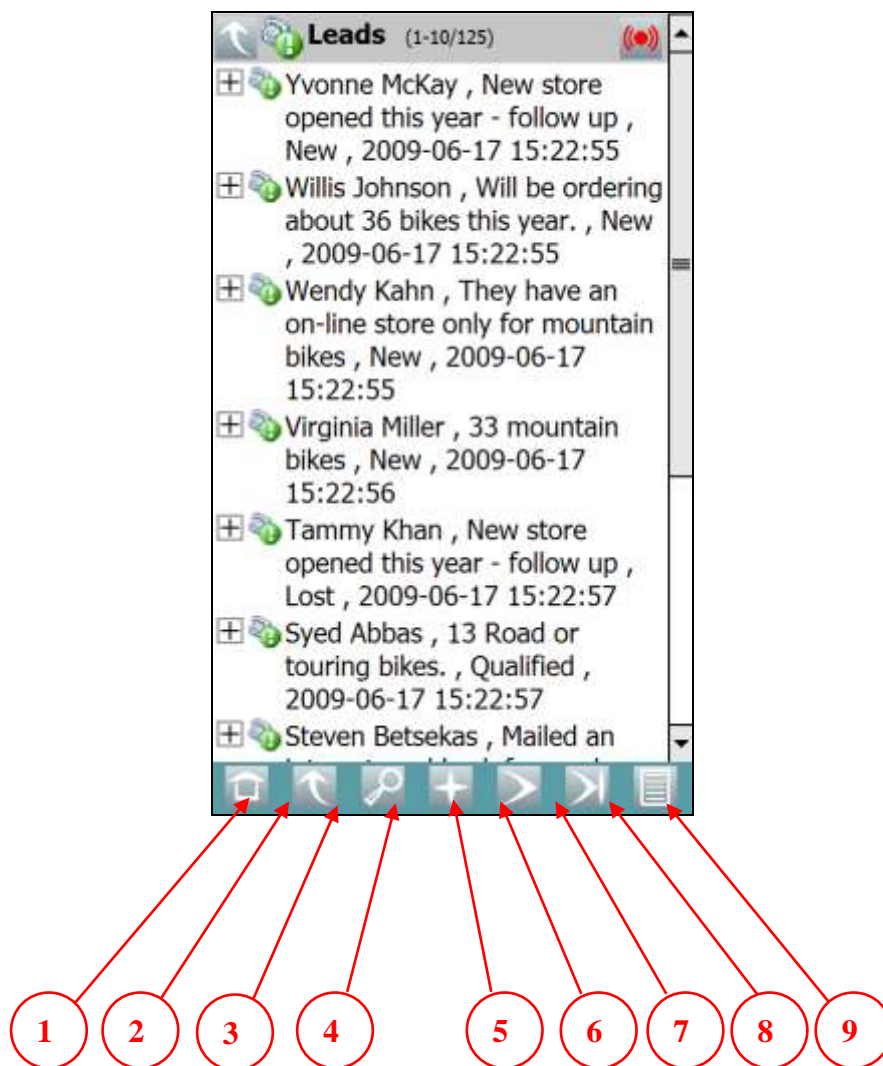
Stylus navigation

This documentation was written based on the finger navigation, However, you can decide to use stylus navigation instead, which is much more useful, if you have to enter a lot of data. The information how to switch between the finger navigation mode and the stylus mode, you can find in the chapter "[Finger navigation](#)".

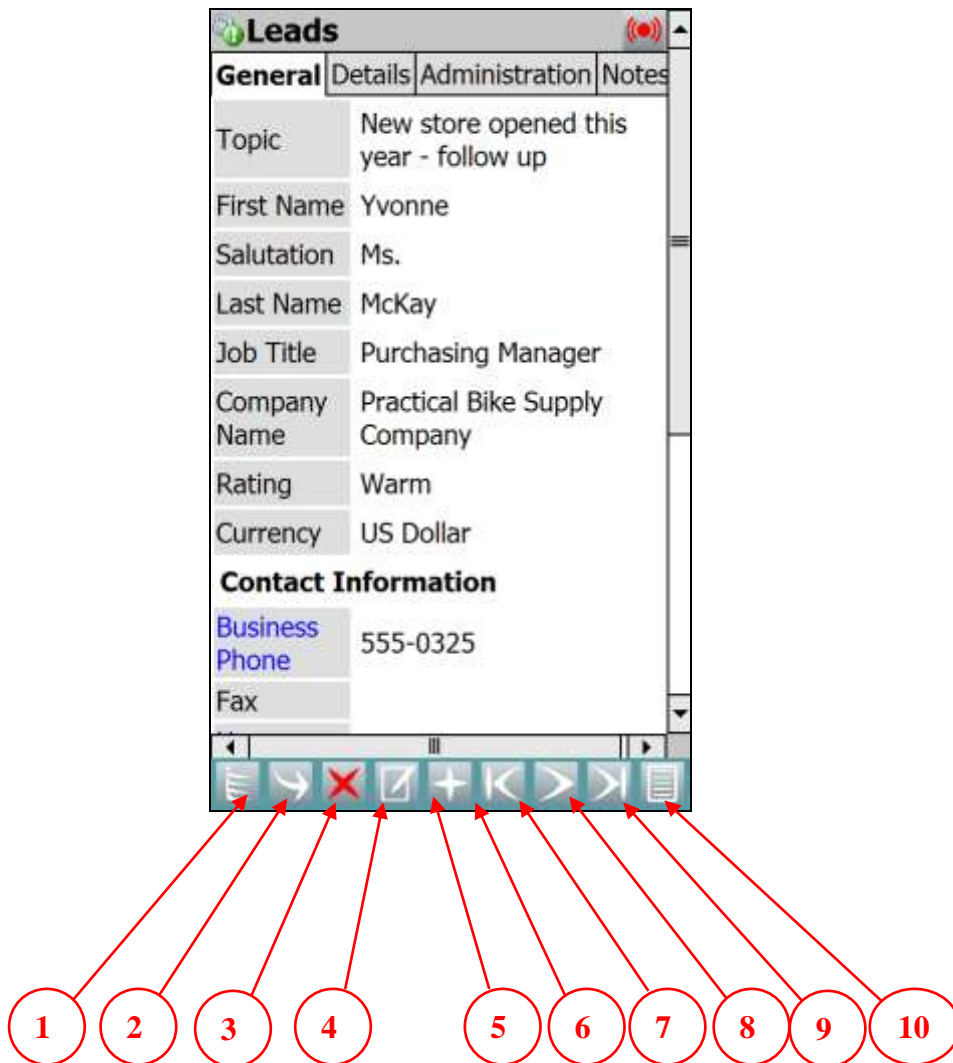
If you switch to the navigation with the stylus, you will see at any window a traditional toolbar instead of the large icons appearing only after you tap the screen, and disappearing after a few seconds.

Bellow, you can see the toolbars that appear at different places, and information regarding the icons from the toolbars.





- 1 – Start side (main menu)
- 2 – One level up
- 3 – Search
- 4 – Add a record
- 5 – First record
- 6 – Previous record
- 7 – Next record
- 8 – Last record
- 9 – Quick menu



- 1 – List view
- 2 – Related objects
- 3 – Delete
- 4 – Edit
- 5 – Add a record
- 6 – First record
- 7 – Previous record
- 8 – Next record
- 9 – Last record
- 10 – Quick menu

Additional information

If you need additional information, please contact us – we will do our best to help you.

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