

5 cool things you can do with CRM for tablets

Level up your CRM experience on
your tablet

This is prerelease documentation
and is subject to change.



1. Pin your favorites to the dashboard

Pin your favorite views and records to your dashboard to easily see the information you use most.

1
(press and hold)

Full Name ↑	Email	Company Name	Business Phone	First Name (Co...	Last Name (Co
Adrian Dumitrascu (sample)	someone_a@example.com	A Store (sample)	555-0156	---	---
Brain LaMee (sample)	someone_b@example.com	Advanced Components (sample)	555-0135	---	---
Cat Francis (sample)	someone_c@example.com	Affordable Equipment (sample)	555-0178	---	---
Cathan Cook (sample)	someone_d@example.com	Basic Company (sample)	555-0158	---	---
Darren Parker (sample)	someone_e@example.com	Best o' Things (sample)	555-0156	---	---
Eva Corets (sample)	someone_f@example.com	Designer Goods (sample)	555-0138	---	---
Forrest Chand (sample)	someone_g@example.com	Blue Company (sample)	555-0198	---	---
Gabriele Cannata (sample)	someone_h@example.com	Elemental Goods (sample)	555-0168	---	---
George Sullivan (sample)	someone_i@example.com	Grand Store (sample)	555-0142	---	---

2

Activate Deactivate Pin to Dashboard Pin to Start Assign

Sales Dashboard

Pinned Tiles

Cat Francis (sample)

My Activities

22 January 3:00 AM

22 January 5:00 AM

23 January 3:00 AM



2. Create communication cards

The communication card is one of the most popular features in CRM for tablets and gives you a bigger view of your record.

The image shows a CRM interface on a tablet. The main screen is titled "Sales Dashboard" and features several sections: "Pinned Tiles" with a card for "Cat Francis (sample)", "My Activities" with a list of tasks, "My Open Opportunities" with a list of sales opportunities, and "My Contacts". A green arrow labeled "1" points to the "Cat Francis (sample)" tile with the text "(press and hold)".

An inset window shows the expanded view of the "Cat Francis (sample)" communication card. It displays the contact's name, title, and phone number. Two callouts are present: "Start an email" pointing to an envelope icon and "Start a Skype call" pointing to a phone icon. A green arrow labeled "2" points to a "Larger" button at the bottom of the screen.

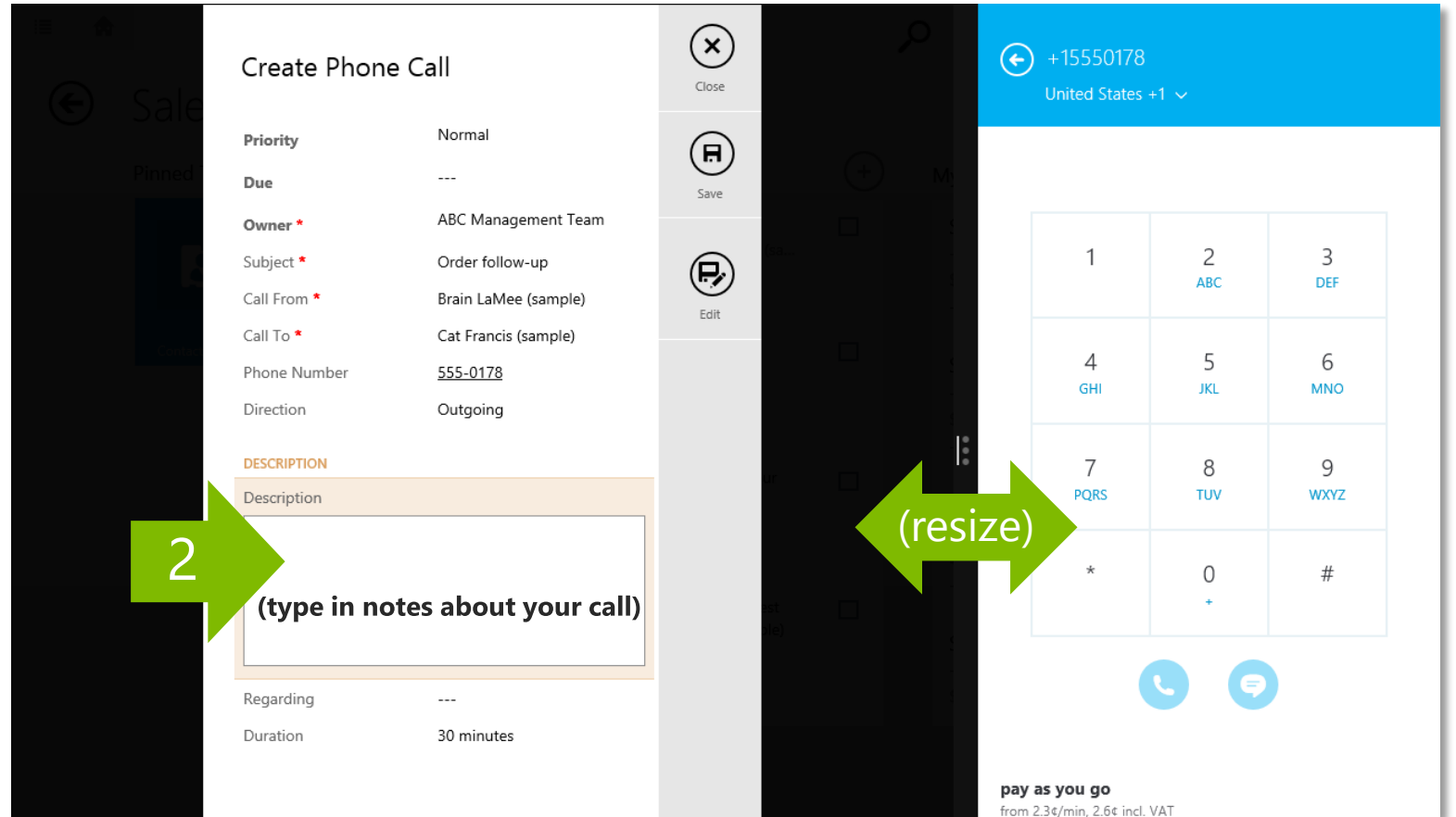
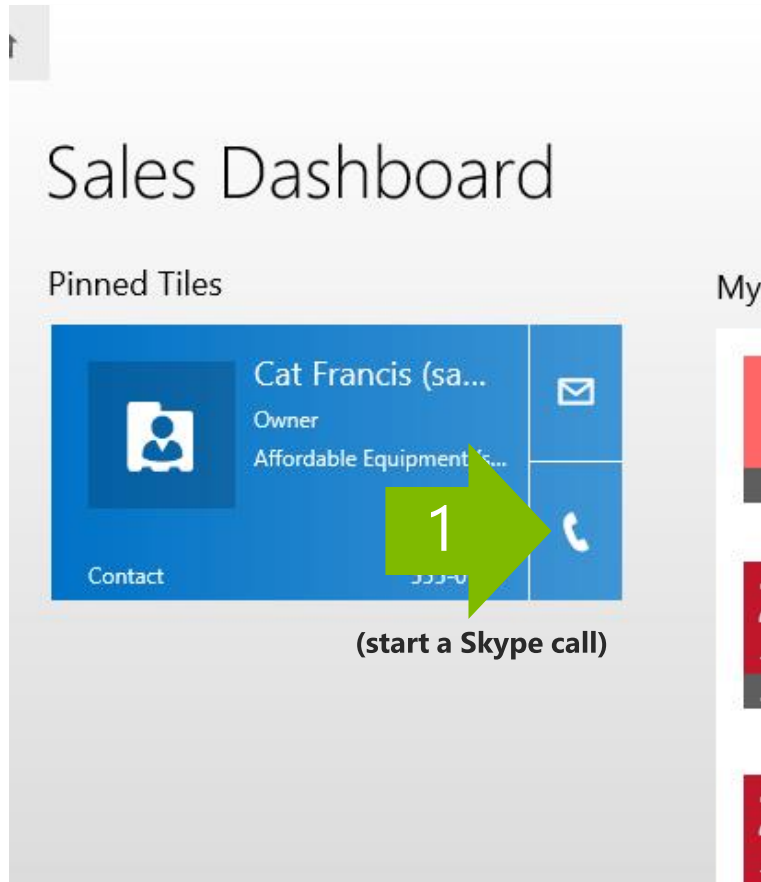
Date	Activity	Time
22 January	My task Basic Company (sa...)	3:00 AM
22 January	Evaluation Plan agreed upon (sample)	3:00 AM
22 January	Likes some of our new products (sample)	5:00 AM
23 January	Mailed an interest card back (sample)	3:00 AM

Opportunity Name	Value
Sample Opp 01	\$120,000.00
Sample Opp 02	\$240,000.00
Sample Opp 03	\$360,000.00
Sample Opp 04	\$500,000.00

Field	Value
Name	Cat Francis (sa...)
Title	Owner
Company	Affordable Equipment (s...)
Phone	555-0178

3. Log phone calls while you talk

In Windows 8, the Skype app automatically snaps to the CRM app when you start a call. Resize the apps if you want, and add information about your call while you're talking.



4. Resize columns

When you resize your columns in CRM, your changes are automatically saved for that view. That way, you can have different column widths per view, making it easy to view the data you want to see most.

Phone Call	Will be ordering soon (sample)	---	High	1/29/2012 2:0
Task	Agree to above in Sponsor letter (sampl...	---	Normal	1/29/2012 2:0
Task	Check sales literature for recent price lis...	---	Normal	1/29/2012 4:0
Phone Call	Discuss new opportunity (sample)	---	High	1/29/2012 2:0
Task	Proposal Issue, Decision Due (sample)	---	Normal	1/29/2012 2:0
Task	Evaluation Plan agreed upon (sample)	---	Normal	1/29/2012 2:0
Task	Evaluation Plan proposed (sample)	---	High	1/29/2012 2:0

More Pin to Start Pin to Dashboard

Activity Type	Subject	Regard...	Priority
Phone Call	Likes our new products (sample)	---	High
Task	Access to power negotiated (sample)	---	Normal
Task	Asked for business (sample)	---	Normal
Phone Call	Will be ordering soon (sample)	---	High
Task	Agree to above in Sponsor letter (sample)	---	Normal
Task	Check sales literature for recent price list (sample)	---	Normal
Phone Call	Discuss new opportunity (sample)	---	High
Task	Proposal Issue, Decision Due (sample)	---	High

(Swipe up for Windows 8 or tap **More** ... for iPad and Android)








5. Drill down to see chart data

Tap the chart header, then tap a section of the chart to see the records for that section.

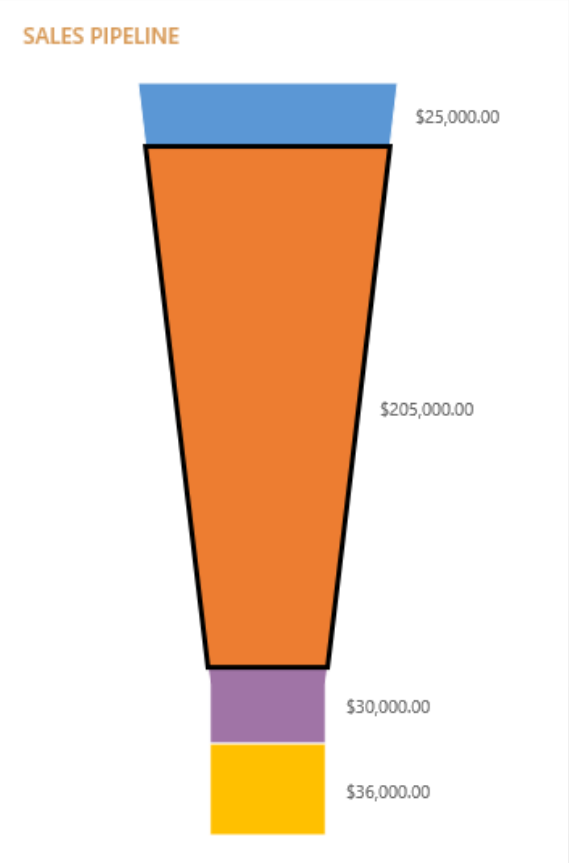
Dashboard

My Active Accounts

-  **A Store (sample)**
555-0136
Renton
-  **Advanced Components (sample)**
555-0135
Dallas
-  **Affordable Equipment (sample)**
555-0162
Santa Cruz
-  **Basic Company (sample)**
555-0174
Lynnwood
-  **Rest o' Things (sample)**

1 → **My Open Opportunities**

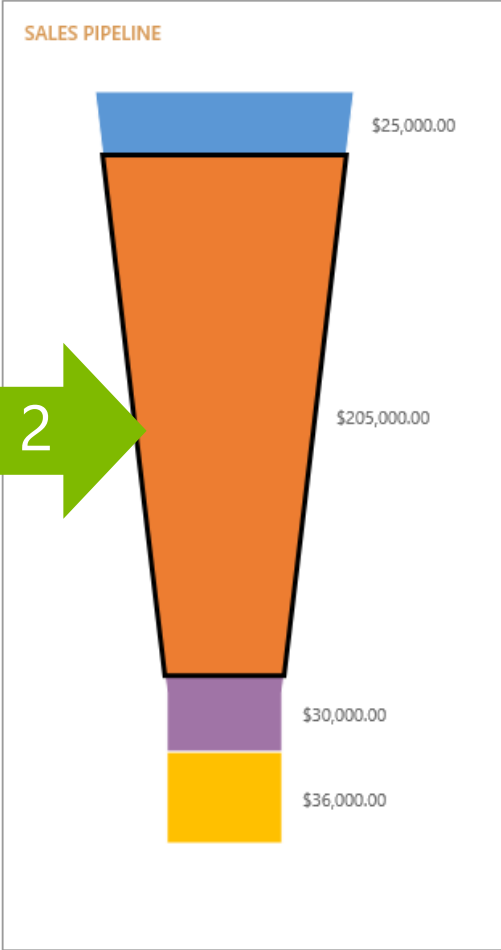
SALES PIPELINE



Segment	Value
Blue	\$25,000.00
Orange	\$205,000.00
Purple	\$30,000.00
Yellow	\$36,000.00


2 → **My Open Opportunities**

SALES PIPELINE



Segment	Value
Blue	\$25,000.00
Orange	\$205,000.00
Purple	\$30,000.00
Yellow	\$36,000.00

Topic	Est. Clo
Will expand their offerings to include some of...	2/8/20
Will order some items soon (sample)	2/9/20
Needs to restock their supply of Product SKU...	4/22/2



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