

Mobile

- **Menu**
 - Companies
 - Search – Enter Company Name or Address
 - Funnel (Top Right)
 - Additional Company Search Fields
 - State
 - City
 - County
 - Zip (Postal Code)
 - Plus (Top Right)
 - Add New Company (Prospect)
 - Company Name
 - Address1
 - Address2
 - Address3
 - City
 - State
 - Zip
 - County
 - Save (Top Right)
 - Save Company Record (Prospect)
 - < Companies (Top Left)
 - Cancel
 - Select Company from List
 - Header
 - Company Name
 - Icon (Top Right)
 - Edit Company
 - < Companies (Top Left)
 - Cancel Return to Company List
 - Launch Inspection (Button)
 - Used to Create a New Associated Machine with Company and Create a New Machine Inspection.
 - Star
 - If highlighted, it will appear in Company Favorite List
 - Phone
 - Select Phone to Call using Phone Dialer
 - Tabs
 - Details
 - Company Name
 - Star – Select to set company as favorite.
 - Account Information
 - Address Information

- Launch Inspection
 - Use ONLY if entering an inspection for a machine NOT in the database for the selected company.
- Related
 - Notes – History of Notes
 - + Add new Note
 - Calls – History of Calls
 - + Add new Call
 - Contacts – Associated Contacts
 - + Add new Contact
 - Equipment – Associated Equipment
 - + Add new Machine
 - Addresses – Associated Addresses
 - + Add new Address
 - Assigned Reps – Assigned Reps by Role
 - Lost Sales & Rentals – History of Lost Sales / Rentals
 - + Add new Lost Sale / Rental
- **Equipment**
 - Search List
 - Search by Make, Model, Serial or Stock #.
 - Select Machine from Equipment List
 - Header
 - Make Model
 - + (Top Right)
 - Add
 - UC Measurement (If Machine has an Undercarriage. This is based on Equipment Category.)
 - Inspection
 - Create a new Inspection
 - Cancel
 - Return to Machine Overview
 - Tabs
 - Overview
 - Undercarriage (If UC Readings Exists)
 - Inspections (If Inspections Exists)
- **Contacts**
 - Header
 - Star (Upper Right)
 - Select to set contact as favorite.
 - Note Pad Pin (Upper Right)
 - Edit Contact
 - Tabs
 - Details

- Contact Detail Information
 - Related
 - Notes – History of Notes
 - + Add new Note
 - Calls – History of Calls
 - + Add new Call
 - Tasks – History of Tasks
 - + Add new Task
 - Search List
 - Search by Name
 - **Activities**
 - Open Tasks
 - **Services**
 - Open Field Service Records
 - Funnel (Top Right)
 - Search by Service Date
 - **More**
 - Logged in Rep
 - Version Installed
 - Sync
 - Last Sync Date
 - Save Call Option
 - Subject
 - Automatically enters Subject if dial contact from crmSeries Mobile.
 - Type
 - Automatically selects Type if dial contact from crmSeries Mobile.
 - Field Service Option
 - Form
 - Completes Field Service using crmSeries Mobile Form.
 - Inspection
 - Completes Field Service using crmSeries Mobile Inspection.
 - Inventory Search
 - Inventory List
 - Funnel (Upper Right)
 - Inventory Advanced Search
 - Clear – Clear Inventory Search Parameters
 - Done – Search Inventory
 - Select Inventory Item for more Details.
 - Details
 - Notes
 - Attachments
 - Options

- < (Upper Left)
 - Return
- Update Offline Inspections
 - If inspections were entered in Offline mode, the number of inspections needing to be sent to the server will appear. Select to send the inspections.
- Refresh Sync
 - Only used if you determine that crmSeries Mobile record are not in Sync with the web. When records are added to the web, they will automatically sync to crmSeries Mobile. NOTE: THE SYNC MAY TAKE SEVERAL MINUTES TO COMPLETE.
- Online / Offline (Toggle)
 - If you plan to enter an inspection in an area where the Internet coverage is weak or does not exist, then select Offline to force crmSeries to work offline. Select again to return to online mode when Internal access is available. See Update Offline Inspection for additional information.
- **Inspections**
 - Entered from an Equipment Record.
 - NOTE: If an Equipment Record does not exist, then enter the inspection from the Company record. This will create an equipment record and open the inspection form.
 - Select + (Top Right) from the Equipment Record.
 - Select Inspection Button
 - Select Cancel to Exit and Return to the Equipment Record.
 - Select Inspection Type
 - Select Next Button
 - NOTE: If Multiple Types of Inspections are available you will be presented with a list of Inspections for the Type selected. If only one type is available, the inspection will automatically appear.
 - Hours
 - Enter hours greater than 0 and tap on the screen to close the number keyboard. NOTE: Important to close the Number keyboard to continue.
 - Bubble icon
 - Select to enter comments. NOTE: Select the microphone on the keyboard for speech-to-text function.
 - Inspection Groups
 - Tap the Inspection Group Name to expand.
 - NOTE: Inspection Group Names in Red indicates required images are within the group and images have not been applied. If the Inspection Group Name is Green this indicates that the Required images for the group have been applied.

- Inspection Items
 - Enter responses for the Inspection Items
 - Camera icon
 - Opens camera to associate image with inspection item.
 - NOTE: May need to Allow Camera to be accessed by crmSeries Mobile.
 - Blue Image icon
 - Select to apply image from image gallery.
 - NOTE: May need to Allow Image Gallery to be accessed by crmSeries Mobile.
 - Red Image icon
 - Select to Manage Inspection Item Images.
 - Save (Save Inspection)
 - Top Right of Form
 - Submit (Save Inspection)
 - Bottom of the Inspection Image Form
 - <-
 - Exit Inspection
 - WARNING Prompt
 - Yes, Submit Changes
 - Save Inspection and Return
 - No, Don't Submit Changes
 - Don't Save and return to Equipment
 - Cancel, I'm Still Working
 - Close Prompt and Continue completing the Inspection.
- **Call**
 - Subject
 - Short subject of the call.
 - Company
 - Automatically will be filled in
 - Contact
 - Status
 - Scheduled (Default)
 - Completed
 - Date
 - Call Date
 - Time
 - Call Time
 - Reminder
 - Type
 - Type of Call
 - Select from List
 - Purpose



- Purpose of the Call
- Select one or More Purposes from the List
- Result
 - Result of the Call
 - Typically, this will not be selected until the call has been completed.
- Comments
- Submit
 - Save Call
 - Submit Button at the Bottom of the Call Form
- Save
 - Save Call
 - Upper Right Icon