info@hand

Customer Relationship & Business Management

Your complete guide to using **info@hand** Mobile.

Learn how to access key data from **info@hand** while on the move, using your BlackBerry, iPhone, Treo or other mobile device. This guide takes you step by step through the entire process.

info@hand Mobile 1.1 User Guide

Doing business,
Better™

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1.0 Welcome

Thank you for using **info@hand** Mobile from The Long Reach Corporation. The **info@hand** Customer Relationship and Business Management (CRBM) System is designed to energise your organisation's efforts to efficiently organise and maintain information that is crucial to many aspects of your business – and **info@hand** Mobile is a key part of its overall capability.

- **info@hand** provides integrated management of corporate information on customer accounts and contacts, sales leads and opportunities, plus activities such as calls, meetings, and assigned tasks.

- **info@hand** offers a Product Catalog, plus the ability to create Quotations and Invoices using products from the Catalog. Payments may be received and allocated against invoices, and the system can produce PDF documents for Quotes, Invoices, Receipts, and Statements.

- The CRBM System tracks financial performance of current projects, and organises a history of all project-related documents, status reports and activities. It also provides information about resource utilisation on projects.

- **info@hand** also supports inbound and outbound email, enables sharing of business documents from HR policies to price lists, manages a photographic staff directory, and organises a calendar of scheduled activities.

- The system even offers a series of graphical Dashboards to track your sales pipeline, the most successful lead sources, service statistics, the costs and revenues from ongoing projects, and key financial metrics.

Most importantly, the system seamlessly blends all of these capabilities into an intuitive and friendly tabbed interface. The instructions in this guide will introduce you to your new Mobile CRBM System's capabilities, and help you get familiar with the fundamentals of using the **info@hand** Mobile system.

1.1 About this Guide

This guide is current with the details of operation for **info@hand** Mobile 1.1 – a part of **info@hand** CRBM System versions 5.1 and later. This guide is designed for users who are new to **info@hand** Mobile, **info@hand** itself, or the areas of customer relationship management, project management, and web-based applications generally.

The information in this guide describes how to use a handheld wireless phone or PDA (any small device with Internet connectivity and a web browser available on it) to access **info@hand**, in order to perform a broad range of corporate information management tasks. Readers are not required to have any programming or software development knowledge, but should be generally familiar with the use of a personal computer, and Internet browser software, as well as the operation of their mobile device.

1.2 Who Should Read this Guide?

This **info@hand** *Mobile User Guide* provides information for two groups of system users –
conventional users who wish to record and track company activities and outcomes; and system
administration personnel who need to install and configure the system as part of its initial
implementation.

2.0 Introducing **info@hand** Mobile

info@hand Mobile enables users that are out of the office and on the move to access critical elements of their **info@hand** data, and to update it and create new data as well.

Not all modules within your **info@hand** system are supported by **info@hand** Mobile. Supported modules currently include:

- Accounts
- Contacts
- Leads
- Opportunities
- Cases
- Meetings
- Calls
- Tasks

As well, within each module, not all data fields for each module are available for display – after all – there is nothing like the usual screen area available.

What the system is intended for is quick and easy remote access to the **info@hand** system, to check or update a Contact's name or address, to update the status of an Opportunity or Case, or to check on your latest task and appointment data – straight from the server in the office.

As there is no 'sync' process involved (you go right to the original server data source at all times) you always have the most current data – including new Appointment (Call or Meeting), Opportunity, Case or Task data just entered by a colleague back at the office, or out of the office at another location.

3.0 Using **info**_@_**hand** Mobile

3.1 Before You Start

This guide assumes that the resources you need to access the **info**_@_**hand** Mobile system are available and that you are familiar with how to use them. If you are not sure whether your mobile device meets the requirements, or how to use required third-party tools (primarily a web browser), talk to your manager or system administrator.

If you would like to learn more about CRM principals in general, and much more about SugarCRM in particular, we recommend you read *Implementing SugarCRM*, written by Michael J.R. Whitehead, and published by Packt Publishing (http://www.packtpub.com).

➋ 3.1.1 Technical Requirements

Before you begin using the system, ensure that you have the appropriate software installed and configured on your mobile device. All you will need is –

- **A current web browser running on your mobile device.**

  info_@_**hand** has been tested with and supports a wide variety of mobile HTML and WAP browsers. The following browsers are known to work with **info**_@_**hand**:

- **Network access to a server that is running the info**_@_**hand software.**

  Your system or network administrator will be able to provide you with an Internet address (URL) from which the system can be accessed. By default, it is your normal URL with /mobile tacked onto the end – so for example *http://iah.mycompany.com/mobile*.

Web Browser and Window Controls

info_@_**hand** dynamically creates the HTML screens displayed by the web browser when you click certain buttons.

Using **'back'** and **'forward'** buttons can cause problems displaying these dynamically generated pages. For this reason, we do not recommend using these controls on your browser when operating **info**_@_**hand**.

➋ Login Information

If you do not provide the correct user name and password, **info**_@_**hand** will not allow you access to the system.

Your system administrator assigns log in information – a user name and password – to every system user. If you have not received your user name and password combination, contact your system administrator.

Note: **info**_@_**hand** Mobile uses the same user name and password as you normally use to access the regular **info**_@_**hand** system.

3.2 Accessing info@hand Mobile

To access **info**@**hand** Mobile, type the URL into your web browser's address bar. You should see a screen similar to the one shown in Figure 1.

Figure 1: The info@hand Log In Screen

This is the **info**@**hand** log in screen. If you do not see a log in screen, verify that you have entered the URL correctly. If you did not make a typing mistake, contact your system administrator to verify that you have the correct URL.

To proceed, you must log in to the system by providing a valid user name and password.

Note: An important aspect of **info**@**hand** Mobile is that it can sense the properties of your mobile device, and adapt the way the screen display is generated to better match the size of your device. **info**@**hand** Mobile recognises four classes of device:

- If a device only accepts WML, it is a WAP browser (WAP = Wireless Access Protocol, something used by devices with small displays and slow Internet connections).
- If it accepts some sort of (X)HTML, then screen width come into play : If width < 320 pixels then it is classed as a small device (most likely a mobile phone, maybe a BlackBerry or a Windows Mobile device such as an iPAQ)
- If screen width is in the range 320 - 639 pixels then it is classed as a medium-sized device (many modern PDAs, including Blackberry 8700, and Treo 650/700p)
- If screen width is 640 pixels or greater, then it is classed as a large device (most likely a PC/ Mac browser, or perhaps a VGA-class PDA such as some Dell Axim models)

Small, medium and large devices each have different screen layouts. For small devices, list views are rendered in one column, each label and data item on a separate line, and the same for detail/edit/ search layouts. For medium devices, there is still a one-column layout, but with labels on the left and data on the right of the same line. For large devices, there is the usual tabular layout for list views, and a 4-column layout for detail/edit/search screens.

The figures below illustrate WAP and Large display devices – otherwise we will use a Medium device display (the BlackBerry 8700) in the other images shown in this guide.

info@**hand** Mobile uses a massive database from the WURFL Open Source project to identify your incoming mobile device, and assign it a display type. In the event that this lookup results in a less than ideal display layout for your device, there are links at the bottom of each screen for S, M and L – to override the system's automatic choice of screen layout for your device, and force it to the Small, Medium or Large layout.

Figure 2: WAP Device Display

Figure 3: Large Device Display

➲ To log in to the System…

In the **info**@**hand** log in screen –

1. Type your user name in the User Name box.
2. Type your password in the Password box. (**Note:** System passwords are case-sensitive.)
3. Click the Log In button.

⬢ If you cannot log in…

- Verify that your username and password were entered correctly, including any capital letters.
- Contact your system administrator to verify that you have the correct username and password combination.
- Your account may have been disabled. Contact your system administrator.

⬢ 3.2.1 Security Timeout

For security reasons, the system will automatically log you out of the system if you do not perform any tasks for a period of time. By default, the system will not log you out until 30 minutes have elapsed without any activity. (This feature can be turned off, or the time period changed, via configuration parameters set by your Administrator.)

When you are ready to resume working with the system, click any button on the screen. The system will automatically load the log in page for you. You can also close all web browser windows and re-load the log in page manually.

3.3 The info@hand Mobile User Interface

The first thing you will see after logging into the system is the menu selection, as shown below:

Figure 4: Menu Selection

Much as you do when using **info@hand** with a full-size browser, simply select the link of one of the modules, and click on it. The list view for that module will then be displayed, with the first 10 records listed, and options to Search for one particular record in that module, or to add a New record, as shown below:
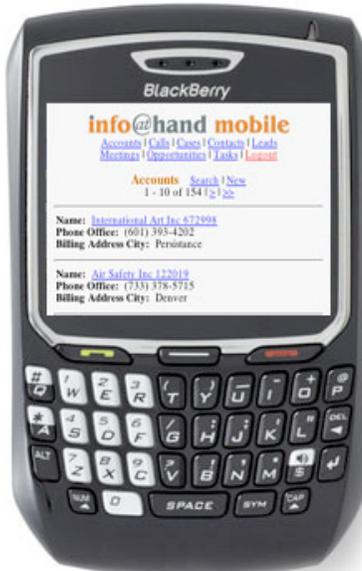

Figure 5: The Accounts List View

➡ **To Search for a Record …**

From the List View screen of any module –

- Click on the Search link
- Fill in text, or make dropdown selections, to indicate data you are looking for (see figure below for an example of Search within accounts module)
- Click on Search link at bottom of screen

Figure 6: The Account Search Screen

➡ **To See Record Details …**

From the Search results screen, or just the module's List View screen, click on the link for the name of the record – such as the account or contact name –

➡ **To Create a New Record …**

From the module's List View screen –

- Click on the New link.
- Enter data for the various fields, including selecting dropdown values.
- Click on the Save link at the bottom of the screen.

To Edit a Record …

From the detail View for a record –

- Click on the Edit link.
- Make whatever changes you like to the data.
- Click on the Save link at the bottom of the screen.

Figure 7: The Edit View

3.4 Logging Out of the System

When you are finished working with the system, you should always log out of the system rather than just closing your web browser.

When a user logs out, the system performs several 'clean-up' procedures, and then automatically returns the web browser window to the Login screen.

To log out…

1. Click the Logout link in the module selection area.
2. If desired, you may now close the browser.

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