

5 cool things you can do with CRM for tablets

Level up your CRM experience on
your tablet



1. Pin your favorites to the dashboard

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

CONTACTS

My Active Contacts

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	---	---

Sales Dashboard

Pinned Tiles

Cat Francis (sample)

My Activities

22 January 3:00 AM

22 January 5:00 AM

23 January 3:00 AM

Activate

Deactivate

Pin to Dashboard

Pin to Start

Assign

1

(press and hold)

2



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 screenshot displays the 'Sales Dashboard' interface. On the left, a green arrow labeled '1' points to a 'Pinned Tiles' section containing a blue tile for 'Cat Francis (sample)'. Below this, the text '(press and hold)' is visible. A second green arrow labeled '2' points to a 'Larger' button at the bottom left. On the right, a magnified view of the 'Cat Francis (sample)' contact card is shown. This card includes a profile picture, name, title 'Owner', company 'Affordable Equipment (s...', and phone number '555-0178'. Two callouts with green boxes point to the card: 'Start an email' points to an email icon, and 'Start a Skype call' points to a phone icon. The background dashboard shows sections for 'My Activities' (with a list of tasks), 'My Open Opportunities' (with a list of sales opportunities), and a search bar at the top.

Sales Dashboard

Pinned Tiles

Cat Francis (sample)

1 (press and hold)

2 Larger

Start an email

Start a Skype call

My Activities

My Open Opportunities

My

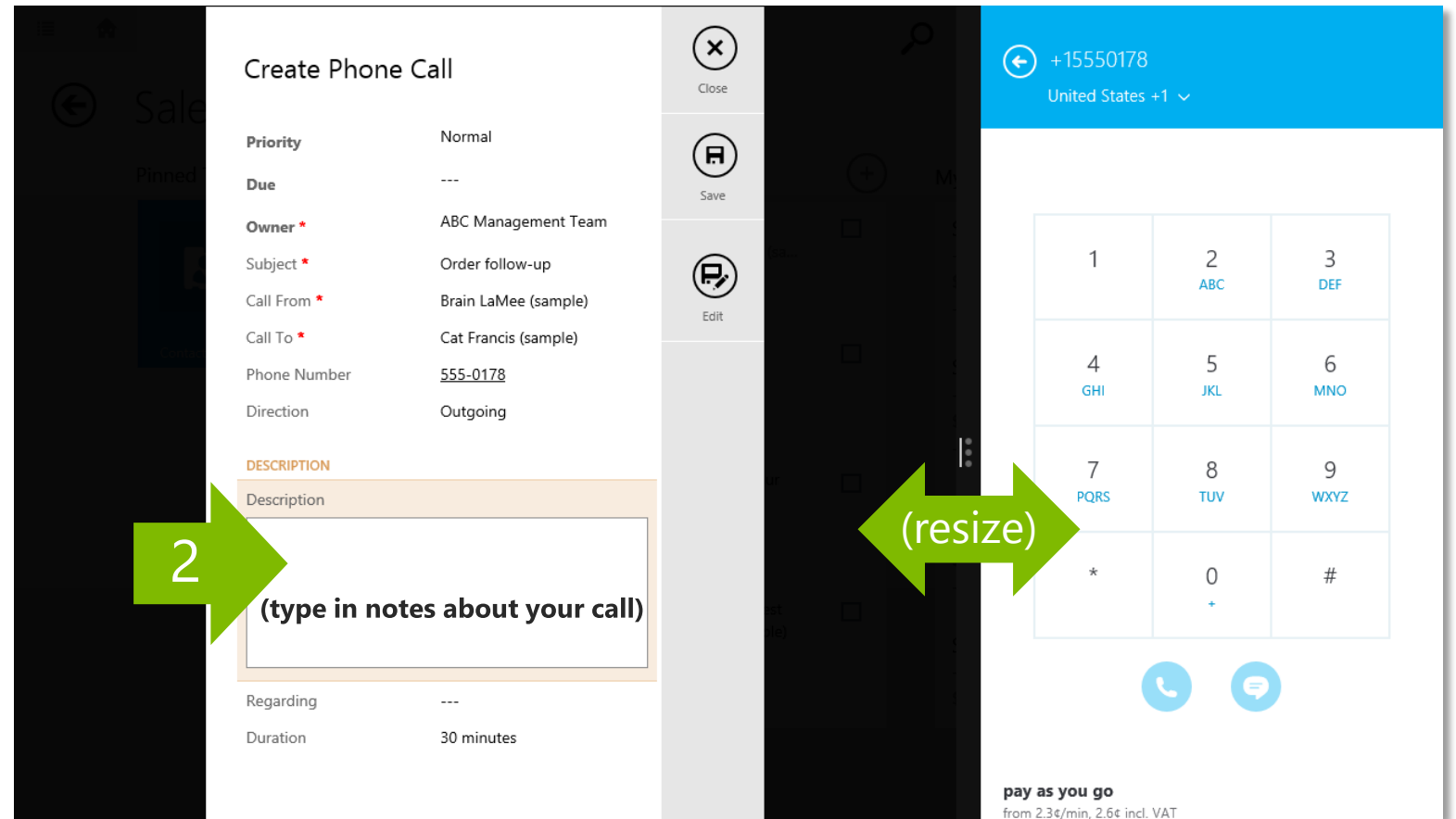
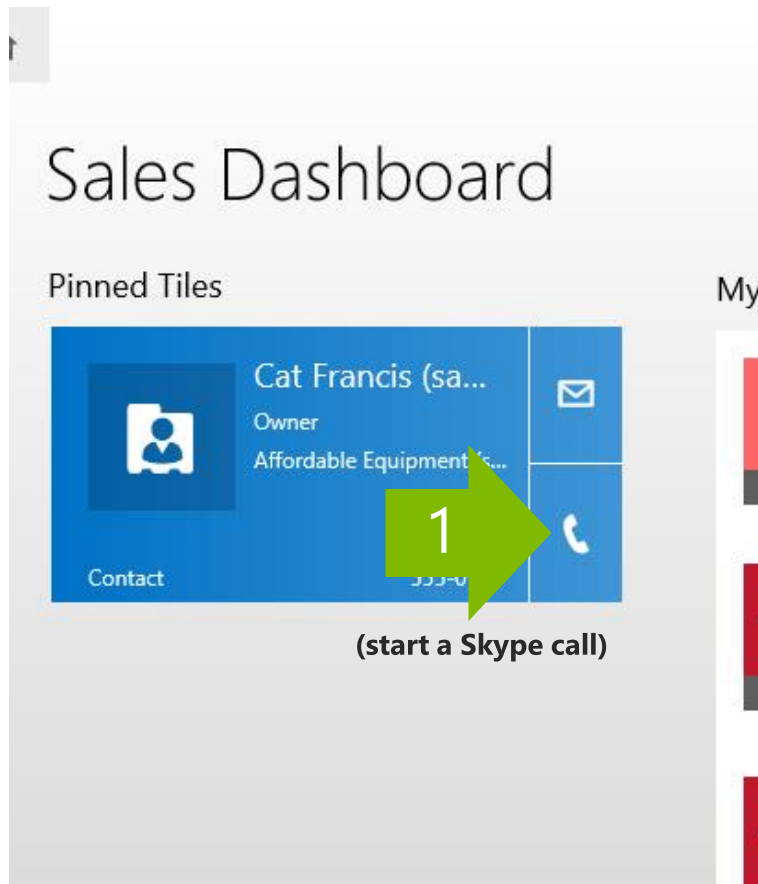
Sales Dashboard

Pinned Tiles

Cat Francis (sa...
Owner
Affordable Equipment (s...
Contact 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.

The screenshot shows a CRM interface with a list of activities. At the bottom, there is a black bar with three icons: a 'More' icon (three dots), a 'Pin to Start' icon (a star), and a 'Pin to Dashboard' icon (a star). A green arrow labeled '1' points to the 'More' icon. A green arrow labeled '2' points to the 'More' icon. A black menu is open over the 'More' icon, showing three options: 'Resize Columns', 'Open in browser', and 'Refresh'. A green arrow labeled '3' points to the 'Resize Columns' option.

Activity Type	Subject	Regard...	Priority
Phone Call	Will be ordering soon (sample)	---	High
Task	Agree to above in Sponsor letter (sampl...	---	Normal
Task	Check sales literature for recent price lis...	---	Normal
Phone Call	Discuss new opportunity (sample)	---	High
Task	Proposal Issue, Decision Due (sample)	---	Normal
Task	Evaluation Plan agreed upon (sample)	---	Normal
Task	Evaluation Plan proposed (sample)	---	High

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

The screenshot shows the same CRM interface as the previous one, but with a green double-headed arrow labeled '4' pointing to the 'Subject' column header. This indicates the action of resizing the column.

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



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

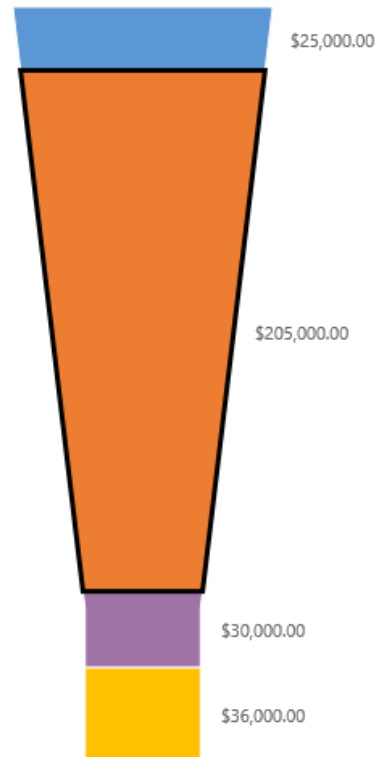
My Active Accounts

-  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)



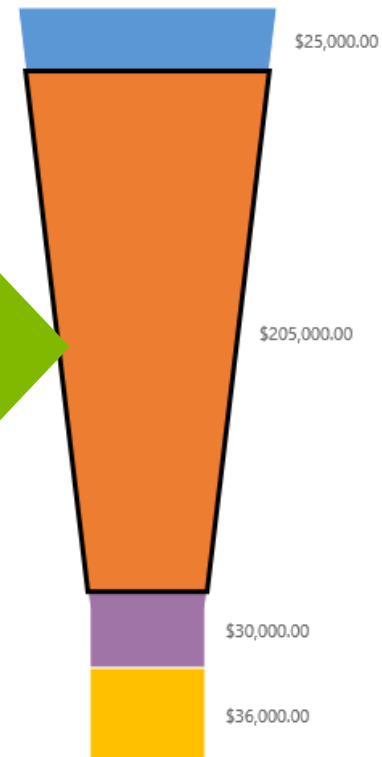
My Open Opportunities

SALES PIPELINE



My Open Opportunities

SALES PIPELINE



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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Version 6.1.0

