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A beginner's guide to Mobile CRM (Part I)



According to a number of industry experts, mobile usage of the internet will surpass desktop in 2014. Mobile is changing Customer Relationship Management (CRM) too, and increasingly more of our customers are accessing Sage CRM on their tablet or smartphone

What is Mobile CRM?

Mobile CRM provides a way for professionals to use CRM software on their tablets and smartphones. Mobile CRM makes it easier for managers, marketing and sales professionals to access data on the road. You should be able to work using mobile CRM as if you were sitting at a desktop.

What are the benefits of Mobile CRM?

Mobile CRM offers a number of specific benefits.

Your business can:

1. Build stronger customer relationships: Sales staff can check customer history, call notes and case information before they visit.
2. Reduce the need for follow-up calls and visits: Reps can view important information before they meet or talk with a customer.



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3. Close more sales in less time: Immediate access to sales leads enables your sales reps to conduct business in real-time.
4. Increase the adoption rate of CRM: If more staff can access CRM from any location, this will increase their comfort with CRM.
5. Increase productivity: Service staff can avoid asking customers questions about issues which have already been logged.
6. Reduce paperwork: Your staff can send the required documentation to relevant departments from any location.

What types of Mobile CRM does Sage CRM offer?

Sage CRM offers native iOS and Windows 8 mobile CRM apps. Customers can also access Sage CRM through the browser of their mobile or tablet.

What's the difference between using a dedicated mobile app and accessing Sage CRM through my mobile browser?

If you access Sage CRM through a mobile app on your tablet or smartphone, you can view contacts, opportunities, notes and customer information. And you can do this with or without internet access. The key advantage here is portability and ease of access.

If you access Sage CRM through your mobile browser, you can run reports and make live updates to your Sage CRM database from your tablet. You can work almost as if you are sitting at a desktop because Sage CRM is presented through an optimised theme for touchscreens or through the traditional Desktop View (depending on your preference). You will, however, require internet access.

Which of Sage Mobile CRM solutions is right for me?

Sage CRM is designed so that users can access CRM from any modern mobile device.

There is nothing stopping you accessing Sage CRM through the mobile browser on your tablet and downloading Sage CRM Sales Lite app for iPhone or Sales Tracker for Windows 8. To find out if your version of Sage CRM is supported, please visit the Mobile Feature Matrix.

In part two of this blog post, we will describe three of the most common tasks Sage CRM users like to accomplish on their tablet or smartphone.