

Go mobile with CRM for tablets

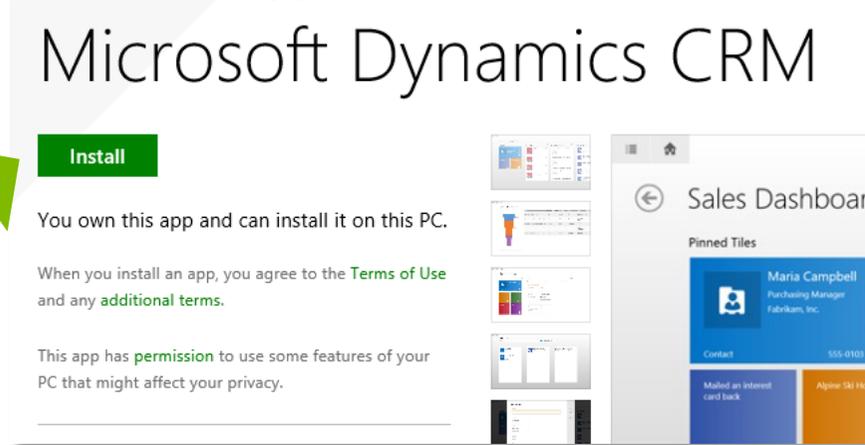
Stay connected with your
customers with the Microsoft
Dynamics CRM for tablets app



install the CRM app on your tablet

Click on the link for your device, or search for **Dynamics CRM** in your device's app store—then install the app.

[CRM for Windows 8 app](#)



Microsoft Dynamics CRM

Install

You own this app and can install it on this PC.

When you install an app, you agree to the [Terms of Use](#) and any [additional terms](#).

This app has [permission](#) to use some features of your PC that might affect your privacy.

Sales Dashboard

Pinned Tiles

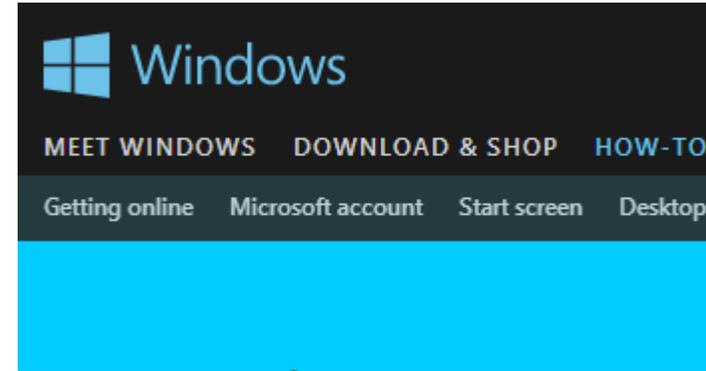
Maria Campbell
Purchasing Manager
Fabrikam, Inc.

Contact 555-0103

Mailed an interest card back

Approved SI

[CRM for Windows 8.1 app](#)



Windows

MEET WINDOWS DOWNLOAD & SHOP HOW-TO

Getting online Microsoft account Start screen Desktop

[CRM for iPad app](#)



Microsoft Dynamics CRM

By Microsoft Corporation

Open iTunes to buy and download apps.



Description

Note: Requires iOS 6

Microsoft Dynamics CRM is the essential business tool to stay up to date with your customer info—even when you're on the go.

[Microsoft Corporation Web Site](#) [Microsoft Dynamics Agreement](#)

What's New in Version 1.0.51

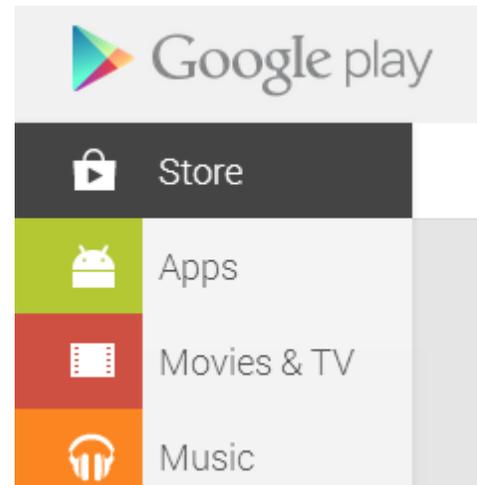
- Support for iOS 7.0
- Support for Chinese and Japanese languages
- Bug fixes

[View in iTunes](#)

Free

Category: Business

[CRM for Android tablet app](#)



Google play

Store

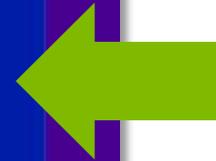
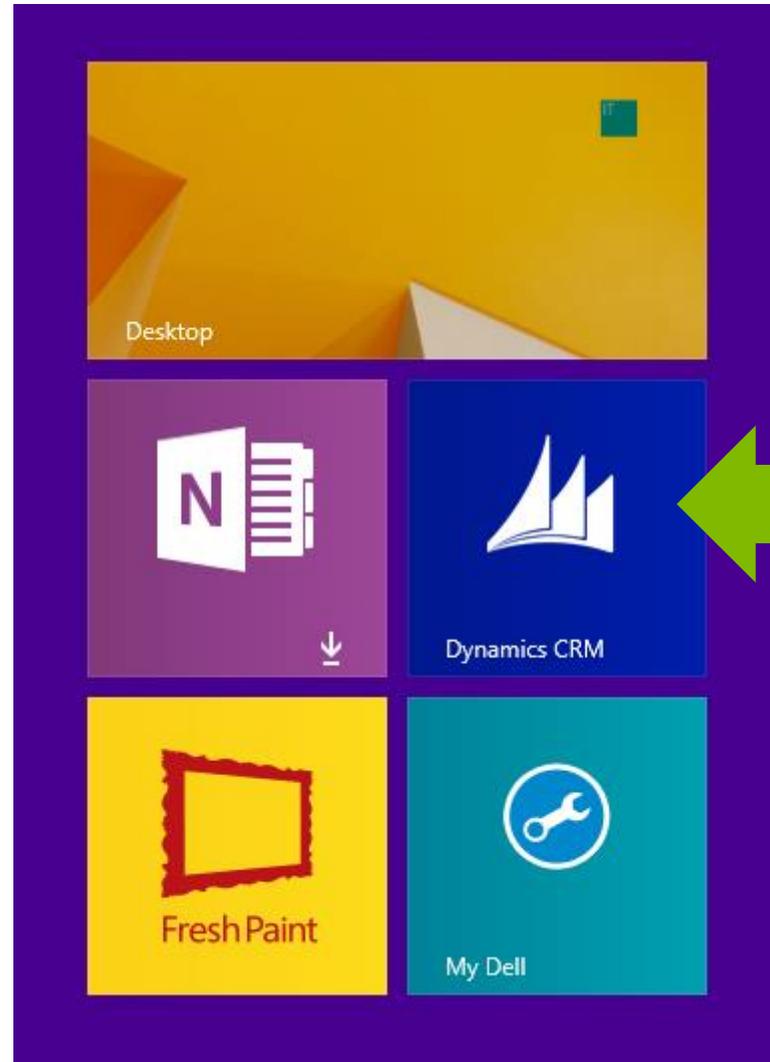
Apps

Movies & TV

Music

start the CRM app on your tablet

Let's get started!

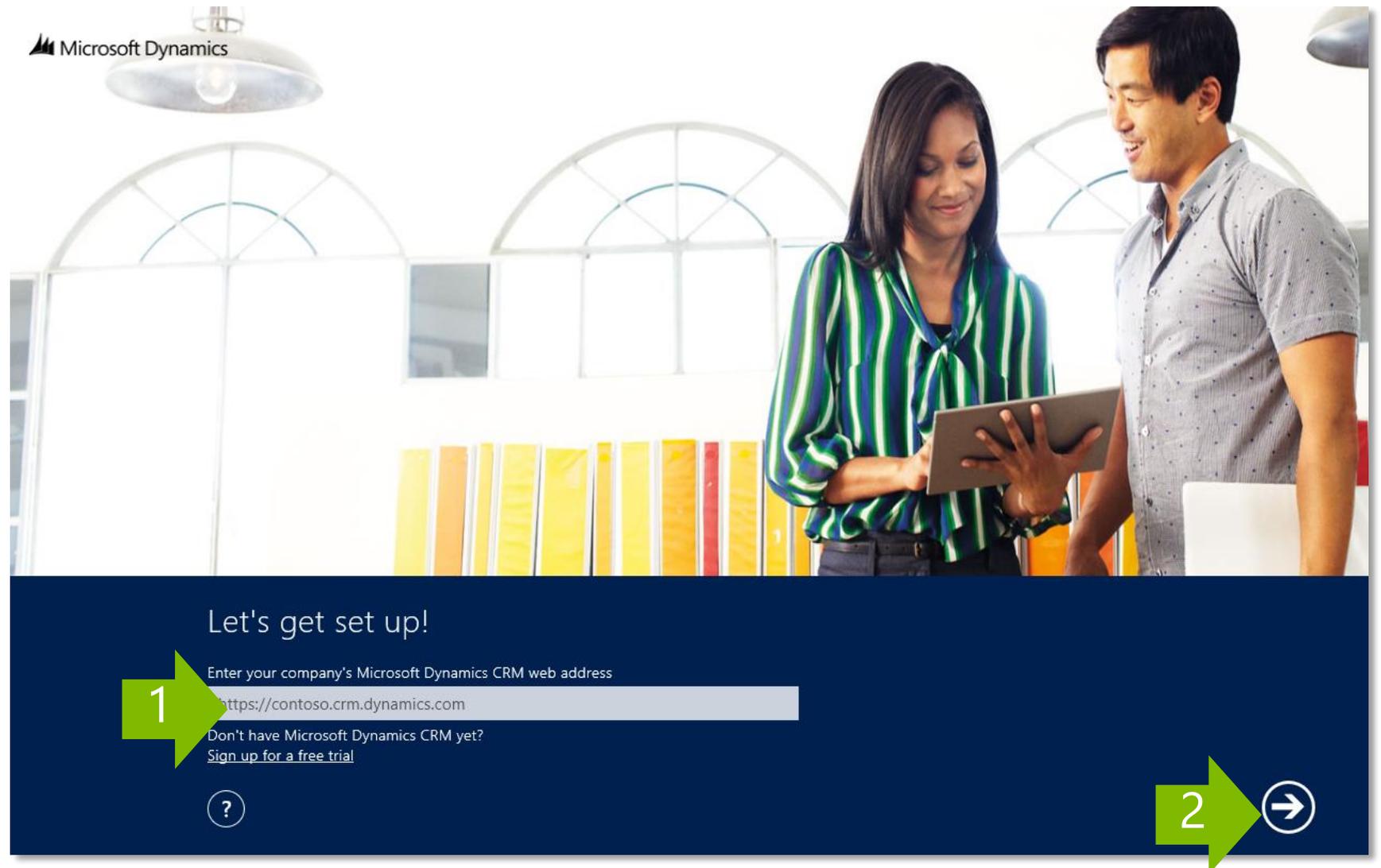


Tap the app tile

connect to your CRM web address

The app will remember this when you start it in the future.

1. Type in the URL your CRM administrator gave you.
2. Tap the arrow to continue.



sign in

Type your username and password.

1. Type in your username.
2. Type in your password.
3. Check the box to stay signed in.
4. Tap **Sign in**.

← Connecting to a service

Sign in

Sign in with your organizational account

1 user@contoso.com

2 Password

3 Keep me signed in

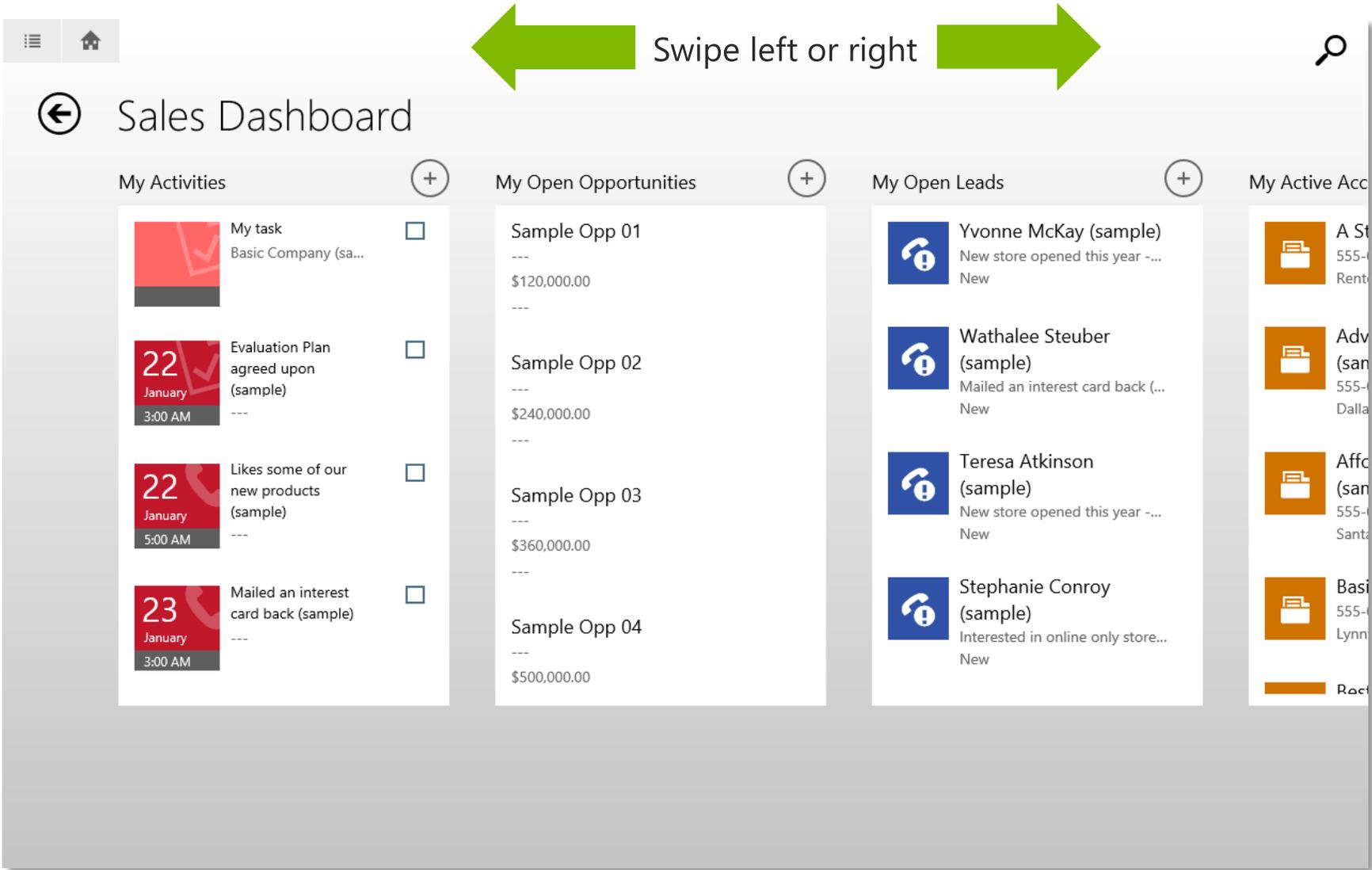
4 **Sign in** Cancel

[Can't access your account?](#)

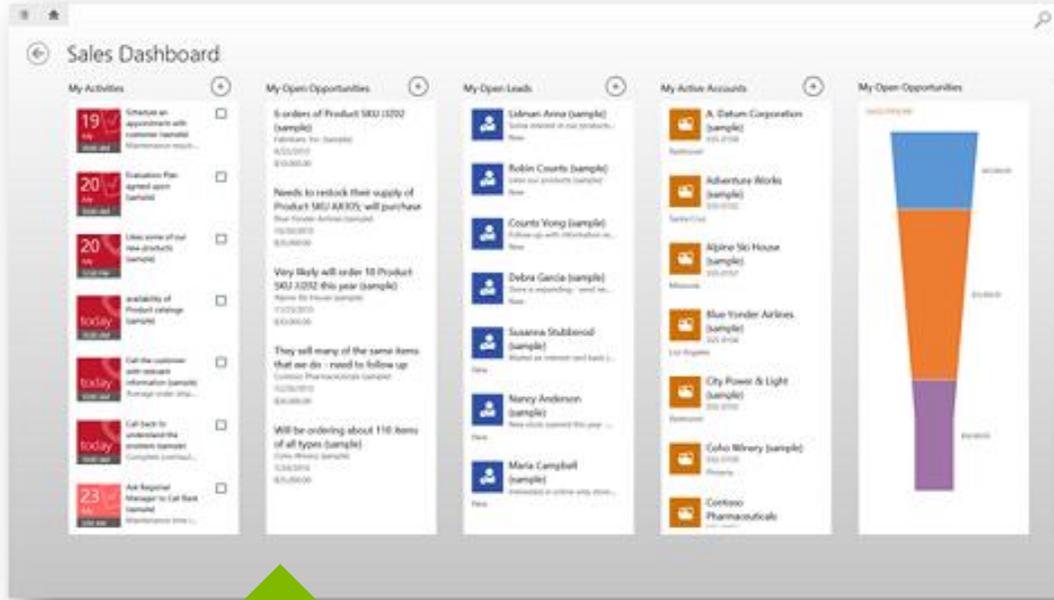
The screenshot shows a sign-in dialog box titled "Connecting to a service" with a back arrow. Below the title, it says "Sign in" and "Sign in with your organizational account". There are four numbered green arrows pointing to the input fields and buttons: 1 points to the username field containing "user@contoso.com", 2 points to the password field, 3 points to the "Keep me signed in" checkbox, and 4 points to the "Sign in" button. A "Cancel" button is also visible. At the bottom, there is a link that says "Can't access your account?".

scroll to view more data

The Sales Dashboard is your home screen. Swipe back and forth to see more data, including sales charts.



see more options with the command bar



Windows 8 and Windows 8.1: Swipe up from bottom of screen

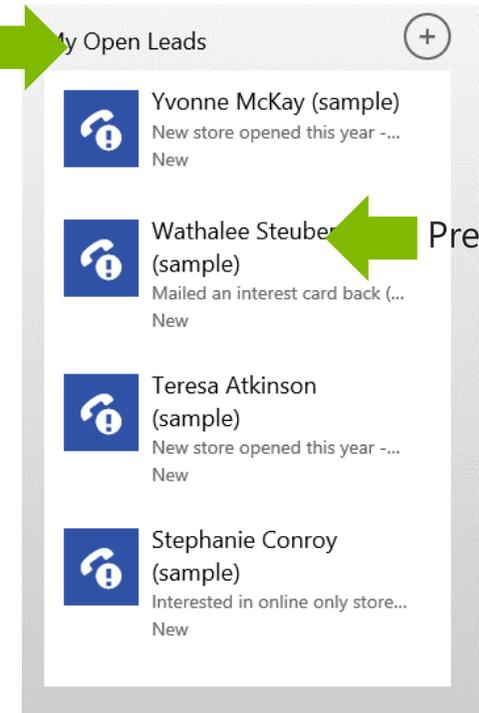
iPad and Android: Tap  on bottom right



Press and hold a record or header

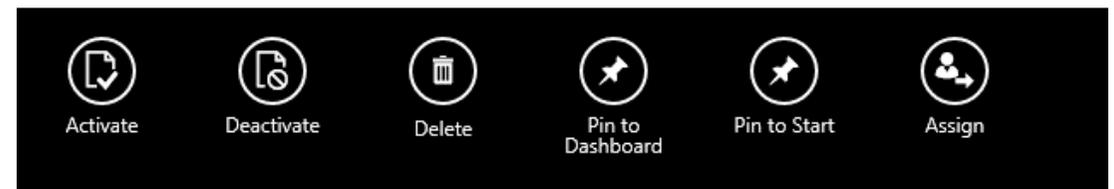
OR

Press and hold 

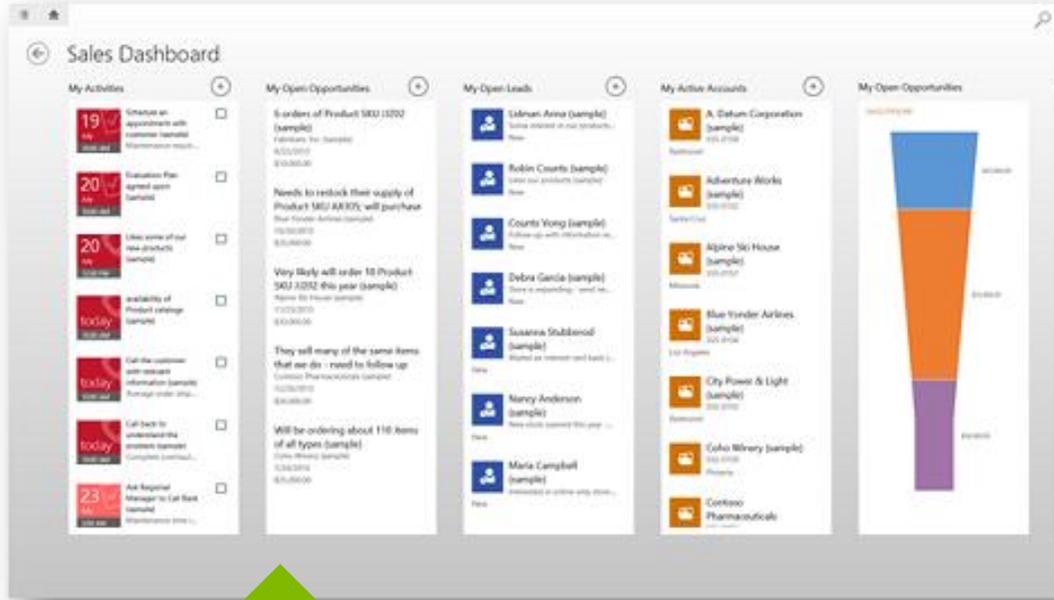


Press and hold

Choose a command on the command bar



see more options with the command bar



Windows 8 and Windows 8.1: Swipe up from bottom of screen

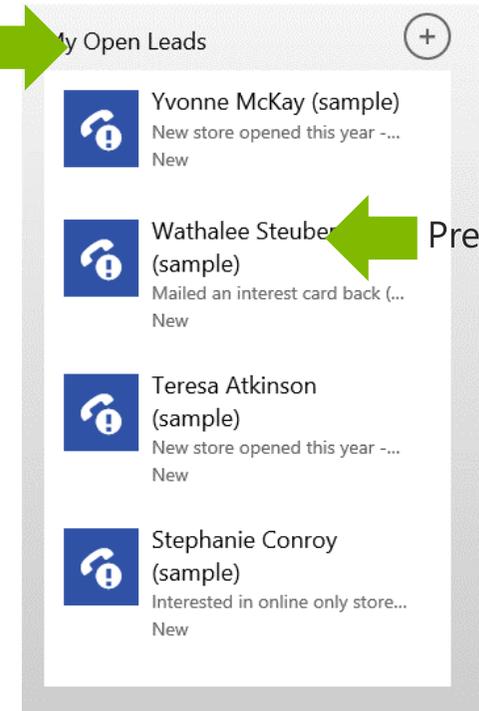
iPad and Android: Tap  on bottom right



Press and hold a record or header

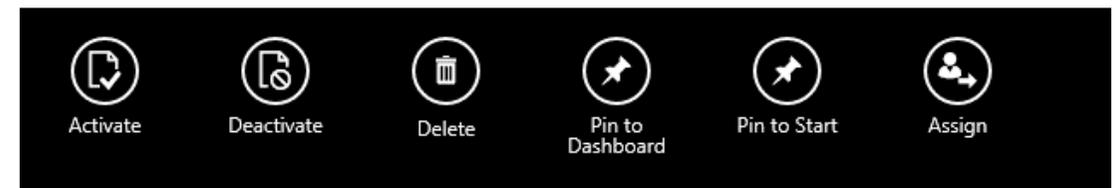
OR

Press and hold 

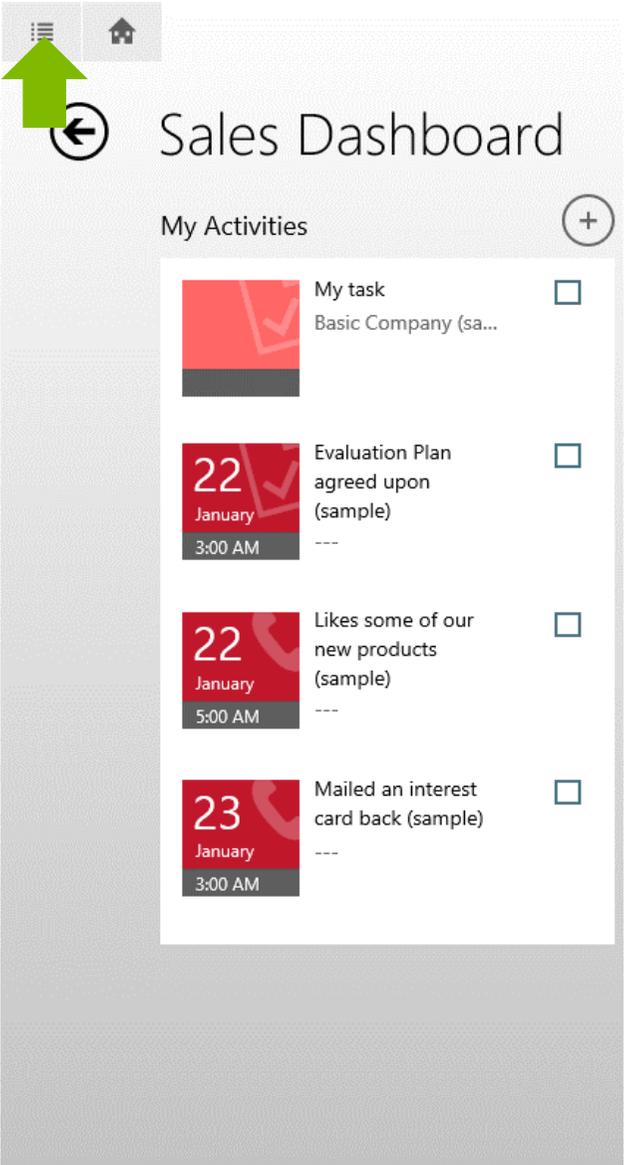


Press and hold

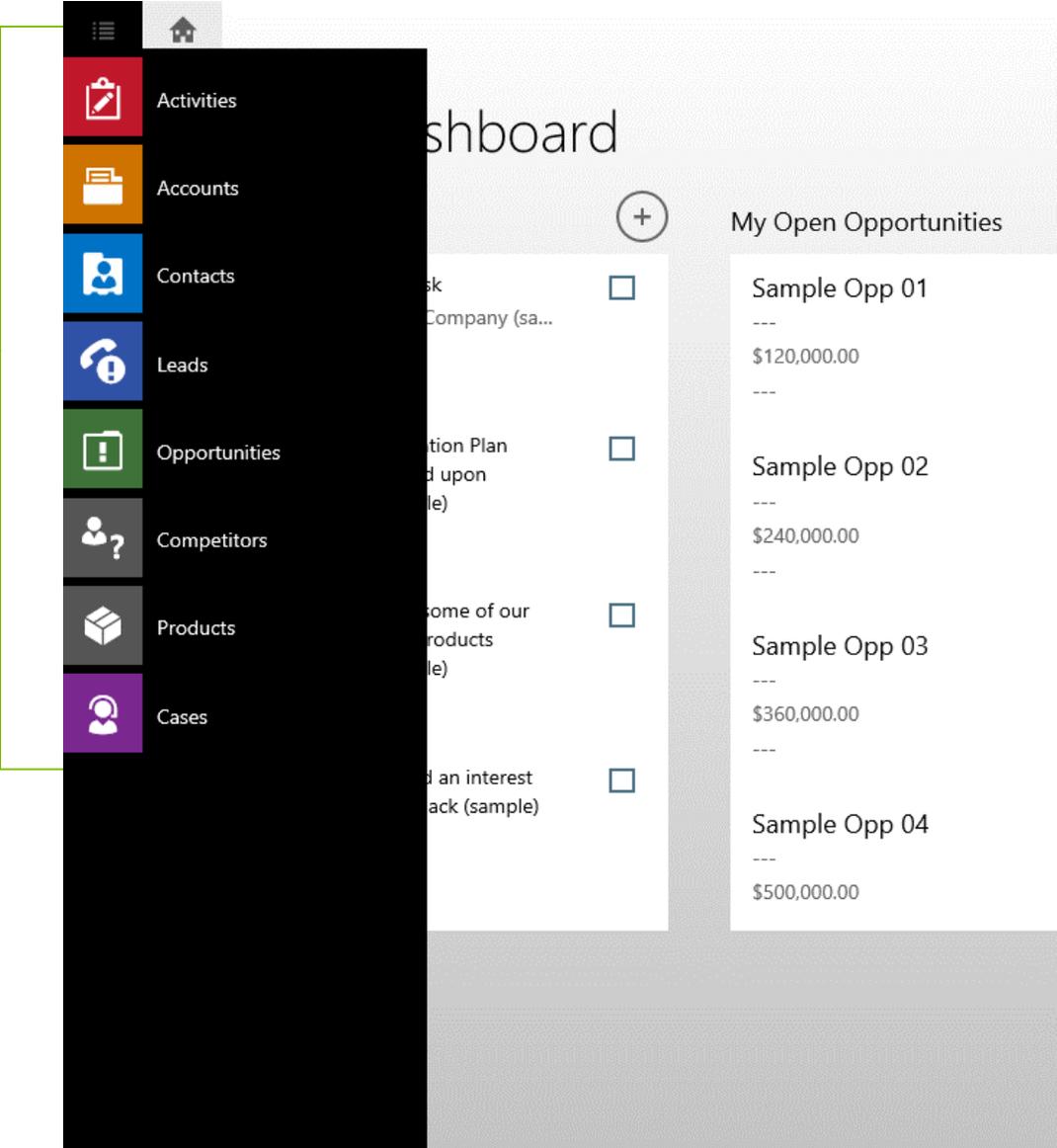
Choose a command on the command bar



show the nav bar



Choose the type of record you want to view



view records

View all records

View a single record

My Open Leads (+)

- Yvonne McKay (sample)
New store opened this year - ...
New
- Wathalee Steuber (sample)
Mailed an interest card back (...)
New
- Teresa Atkinson (sample)
New store opened this year - ...
New
- Stephanie Conroy (sample)
Interested in online only store...
New

Name	Topic	Status Reason	Created On ↓	Company Name
Yvonne McKay (sample)	New store opened this year - follow...	New	1/24/2012 3:56 PM	---
Wathalee Steuber (sample)	Mailed an interest card back (sample)	New	1/24/2012 3:56 PM	---
Teresa Atkinson (sample)	New store opened this year - follow...	New	1/24/2012 3:56 PM	---
Stephanie Conroy (sample)	Interested in online only store (samp...	New	1/24/2012 3:56 PM	---

Yvonne McKay (sample)

Relationships

- Peter Hecke (Owner)
- Activities

Summary

Lead Source	Advertisement
Rating	Warm
Status	New
Owner *	Peter Hecke

CONTACT

Topic *	New store opened this year - follow up (sample)
First Name +	Yvonne
Middle Name	---
Last Name *	McKay (sample)
Job Title	Purchasing Manager
Business Phone	555-0146
Mobile Phone	---
Email	someone1@example.co

Qualify

- Existing Contact? ---
- Existing Account? ---
- Purchase Timeframe ---
- Estimated Budget ---
- Purchase Process ---
- Identify Decision Maker ---
- Capture Summary ---

add records

My Open Leads +

-  Yvonne McKay (sample)
New store opened this year -...
New
-  Wathalee Steuber (sample)
Mailed an interest card back (...
New
-  Teresa Atkinson (sample)
New store opened this year -...
New
-  Stephanie Conroy (sample)
Interested in online only store...
New

Add information and **Save**

Create Lead

DETAILS

Topic *

Budget Amount ---

Purchase Timeframe ---

Currency US Dollar

PERSONAL INFORMATION

First Name + ---

Last Name * ---

Job Title ---

Company Name + ---

CONTACT DETAILS

Email ---

Mobile Phone ---

Description ---

Close

Save

Edit

change views

Choose view



The screenshot shows a mobile application interface with a sidebar menu on the left, a main content area with three columns, and a bottom navigation bar. The sidebar menu is titled 'SYSTEM VIEWS' and lists various lead-related views. The main content area has three columns: 'My Open Opportunities', 'My Open Leads', and 'My Active Acc'. The 'My Open Leads' column is highlighted with a red border and a green arrow labeled '1' pointing to the top right corner. The bottom navigation bar has five icons: 'New Lead', 'Select View', 'Pin to Dashboard', 'Pin to Start', and 'Refresh'. A green arrow labeled '2' points to the 'Select View' icon.

SYSTEM VIEWS

- All Leads
- All Leads In Current Fiscal Year
- Campaign Leads
- Closed Leads
- Leads Being Followed
- Leads I Follow
- Leads Opened Last Week
- Leads Opened This Week
- Leads: Influenced Deals That We Won
- Leads: No Campaign Activities Sent

My Open Opportunities

- Sample Opp 01

\$120,000.00

- Sample Opp 02

\$240,000.00

- Sample Opp 03

\$360,000.00

- Sample Opp 04

\$500,000.00

My Open Leads

- Yvonne McKay (sample)
New store opened this year -...
New
- Wathalee Steuber (sample)
Mailed an interest card back (...
New
- Teresa Atkinson (sample)
New store opened this year -...
New
- Stephanie Conroy (sample)
Interested in online only store...
New

My Active Acc

- A St
555-I
Rent
- Adv
(san
555-I
Dalla
- Affc
(san
555-I
Sant
- Basi
555-I
Lynn
- React

Bottom Navigation Bar:

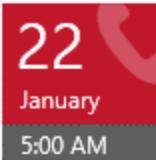
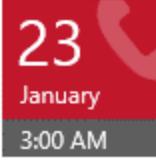
- New Lead
- Select View
- Pin to Dashboard
- Pin to Start
- Refresh

Press and hold

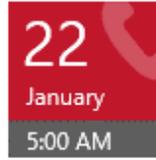
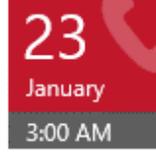


mark activities complete

My Activities +

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

My Activities +

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

search for records

The screenshot displays a CRM interface with a search bar and a list of search results. The search bar contains the text 'mag' and has a magnifying glass icon to its right. A dropdown menu is open below the search bar, showing a list of accounts. The first result is 'Magnificent Store (sample)' with the account ID 'BOBC3J9U' and the contact 'Patrick Steiner (sample)'. The search bar is highlighted with a green arrow labeled '2'. The magnifying glass icon is highlighted with a green arrow labeled '1'. The dropdown menu is highlighted with a green arrow labeled '3'. The search results are highlighted with a green arrow labeled '4'. The text 'Type one or more letters' is positioned above the search bar.

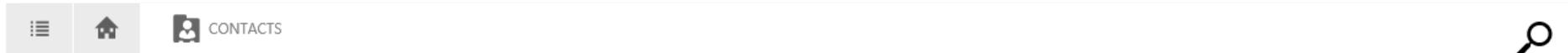
Start Search with:  Filter with: 

Type one or more letters

Accounts

-  **Magnificent Store (sample)**
BOBC3J9U
Patrick Steiner (sample)

pin your favorites to the dashboard

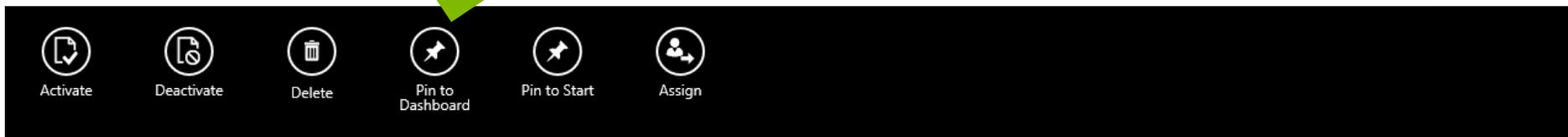
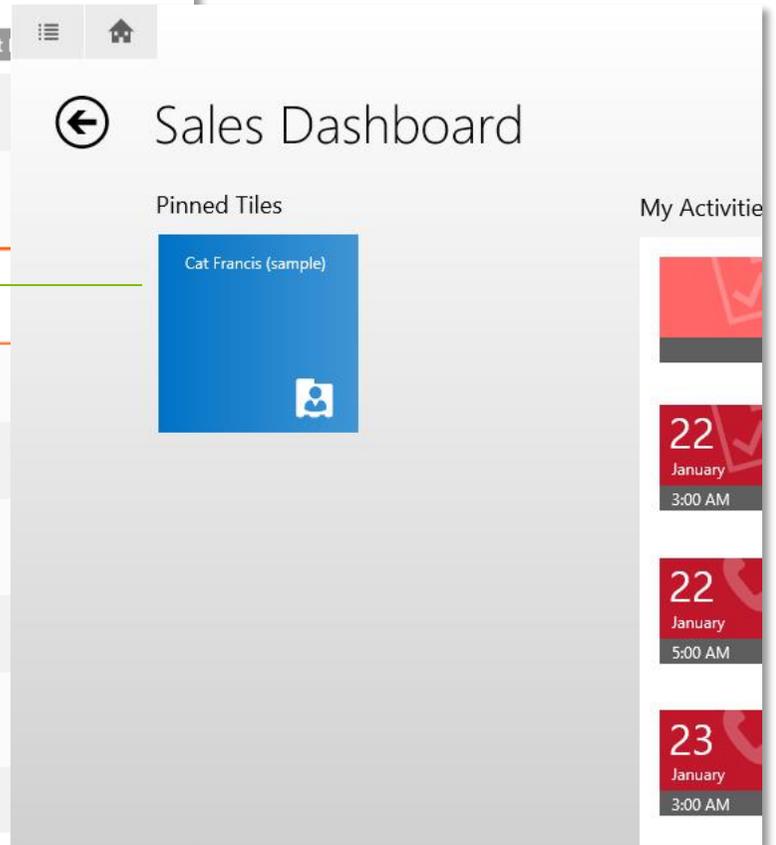


My Active Contacts

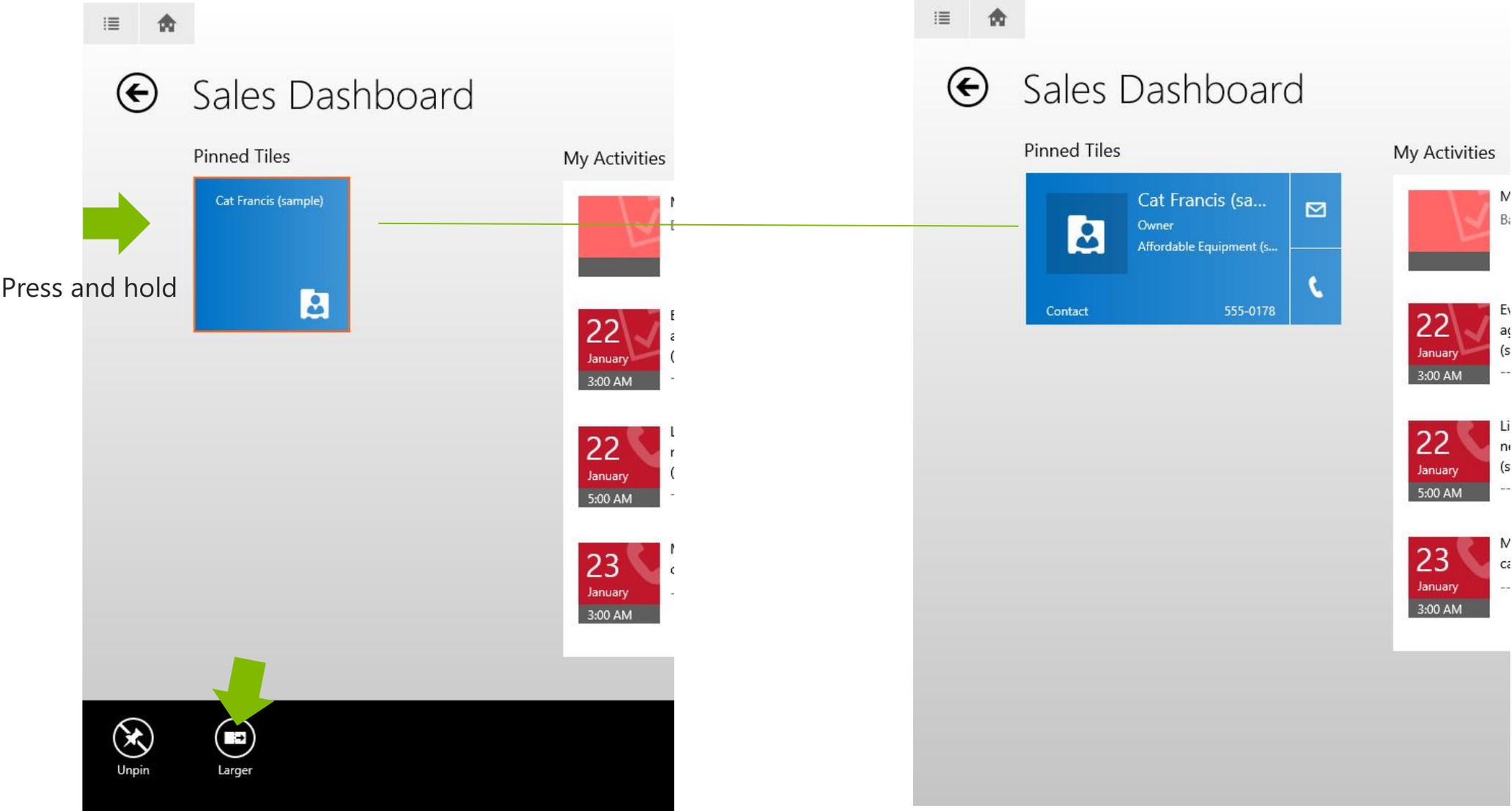
Full Name ↑	Email	Company Name	Business Phone	First Name (Co...	Last
Adrian Dumitrascu (sample)	someone_a@example.com	A Store (sample)	555-0156	---	---
Brain LaMee (sample)	someone_b@example.com	Advanced Components (sample)	555-0135	---	---
Cat Francis (sample)	someone_c@example.com	Affordable Equipment (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	---	---



Press and hold



create communication cards



start an email

Sales Dashboard

Pinned Tiles

My

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

Contact 555-0178

A green arrow points to the email icon on the contact tile.

OR

CONTACTS

My Active Contacts

Full Name ↑	Email	Company
Adrian Dumitrascu (sample)	someone_a@example.com	A Store (
Brain LaMee (sample)	someone_b@example.com	Advance (sample)
Cat Francis (sample)	someone_c@example.com	Affordat (sample)
Cathan Cook (sample)	someone_d@example.com	Basic Co
Darren Parker (sample)	someone_e@example.com	Best o' T
Eva Corets (sample)	someone_f@example.com	Design (sample)
Forrest Chand (sample)	someone_g@example.com	Blue Cor
Gabriele Cannata (sample)	someone_h@example.com	Element (sample)
George Sullivan (sample)	someone_i@example.com	Grand St

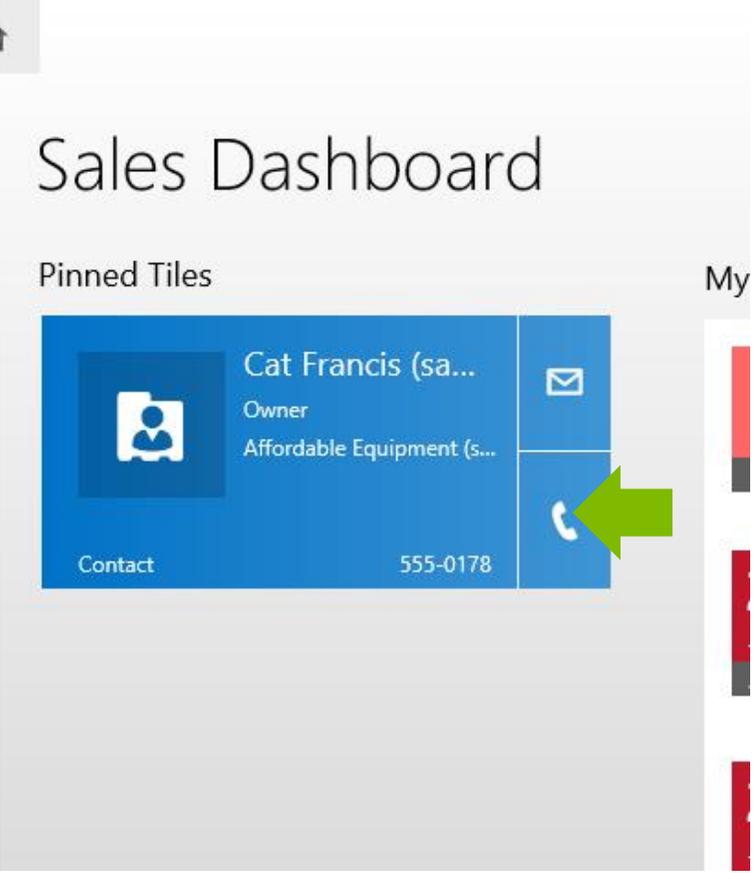
A green arrow points to the email address of Cat Francis in the contacts list.

start a call

Sales Dashboard

Pinned Tiles

My



Cat Francis (sa...)
Owner
Affordable Equipment (s...)
555-0178

Contact

OR

	Company Name	Business Phone
ple.con	A Store (sample)	555-0156
ple.con	Advanced Components (sample)	555-0135
ple.con	Affordable Equipment (sample)	555-0178
ple.con	Basic Company (sample)	555-0158
ple.con	Best o' Things (sample)	555-0156
ple.con	Designer Goods (sample)	555-0138
ple.con	Blue Company (sample)	555-0198
ple.con	Elemental Goods (sample)	555-0168
ple.con	Grand Store (sample)	555-0142

sort a list



My Active Accounts

Tap any column header to sort by that column

Account Name ↑	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
A Store (sample)	555-0136	Renton	Adrian Dumitrascu (sample)	someone_a@example.com
Advanced Components (sample)	555-0135	Dallas	Brain LaMee (sample)	someone_b@example.com
Affordable Equipment (sample)	555-0162	Santa Cruz	Cat Francis (sample)	someone_c@example.com
Basic Company (sample)	555-0174	Lynnwood	Cathan Cook (sample)	someone_d@example.com
Best o' Things (sample)	555-0145	Los Angeles	Darren Parker (sample)	someone_e@example.com
Blue Company (sample)	555-0131	Redmond	Forrest Chand (sample)	someone_g@example.com
Designer Goods (sample)	555-0197	Redmond	Eva Corets (sample)	someone_f@example.com
Elemental Goods (sample)	555-0127	Missoula	Gabriele Cannata (sample)	someone_h@example.com
Grand Store (sample)	555-0135	Redmond	George Sullivan (sample)	someone_i@example.com
Litware Inc. (sample)	555-0116	Phoenix	Marco Tanara (sample)	someone_j@example.com

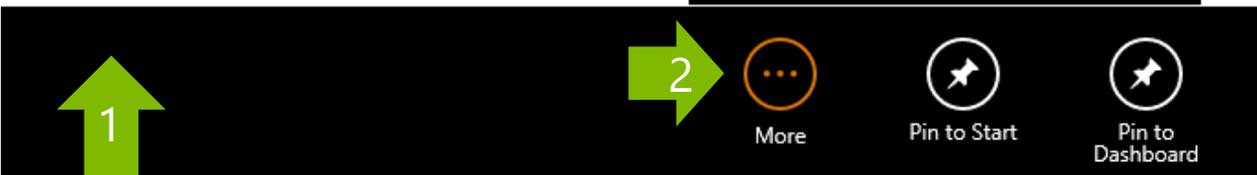
resize columns in a list

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)	---	Normal	1/29/2012 2:00

Resize Columns 

Open in browser

Refresh



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

Move handles left or right to resize columns



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

view records for a chart

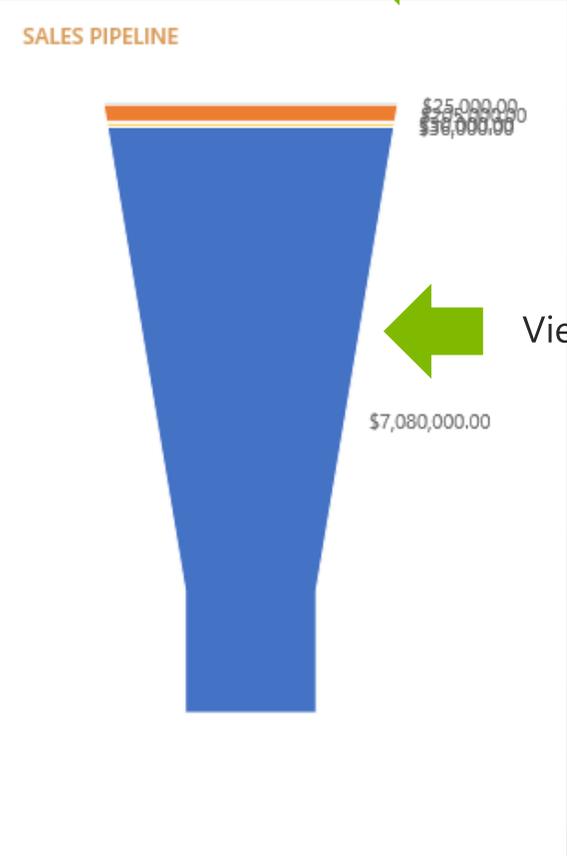
Dashboard

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



View all records for the chart

View records for chart section

Section	Value
Top Section	\$25,000.00
Second Section	\$28,000.00
Third Section	\$38,000.00
Bottom Section	\$7,080,000.00

show a different chart

Press and hold

1

2

Select View Select Chart Refresh

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
- Best o' Things (sample)

My Open Opportunities

SALES PIPELINE

\$25,000.00
\$30,000.00

\$7,080,000.00

My Closed Opportunities In Current F...

No data available.

Month	Value
03/13	30
05/13	45
07/13	65
09/13	75
11/13	80

choose a different chart view

Choose view

3

2

1

Press and hold

Dashboard

Accounts

My Open Opportunities

My Closed Opportunities In Current F...

My Connections

Opportunities Being Followed

Opportunities Closing Next Month

Opportunities I Am A Member Of

SALES PIPELINE

My Open Opportunities

My Closed Opportunities In Current F...

No data available.

80K

70

60

50

40

30

20

10

03/13 05/13 07/13 09/13 11/13

\$25,000.00

\$36,000.00

\$7,080,000.00

Select View

Select Chart

Refresh

open a record in your web browser

The image displays two overlapping screenshots from the Microsoft Dynamics CRM interface. The left screenshot shows a record for 'Yvonne McKay (sample)' with various fields and a 'Qualify Stage' section. The right screenshot shows the 'Sign in to web app' screen with a green arrow pointing to the password field and another green arrow pointing to the 'Open in browser' button in the bottom navigation bar.

Yvonne McKay (sample) Record Details:

- Lead Source:** Advertisement
- Rating:** Warm
- Status:** New
- Owner:** Peter Hecke
- CONTACT**
- Topic:** New store opened this year - follow up (sample)
- First Name:** Yvonne
- Middle Name:** ---
- Last Name:** McKay (sample)
- Job Title:** Purchasing Manager
- Business Phone:** 555-0146
- Mobile Phone:** ---
- Email:** som...@example.co

Qualify Stage:

- Existing Contact? ---
- Existing Account? ---
- Purchase Timeframe? ---
- Estimated Budget ---
- Purchase Process ---
- Identify Decision Maker ---
- Capture Summary ---

Sign in to web app:

- Microsoft Dynamics CRM
- Sign in with your organizational account
- Username field
- Password field
- Keep me signed in checkbox
- Sign in button
- Can't access your account? link

Bottom Navigation Bar:

- More
- Qualify
- Open in browser (highlighted with green arrow)
- Refresh
- Pin to Start
- Pin to Dashboard
- Delete
- New

Thanks for reading!

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We'd love to know what you think.

[CRM Help & Training site](#)

Version 7.1.1



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