

5 cool things you can do with CRM for tablets

Quick tips to level up your
Microsoft Dynamics 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.



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	---	---



(press and hold)



Sales Dashboard



My Activities



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.

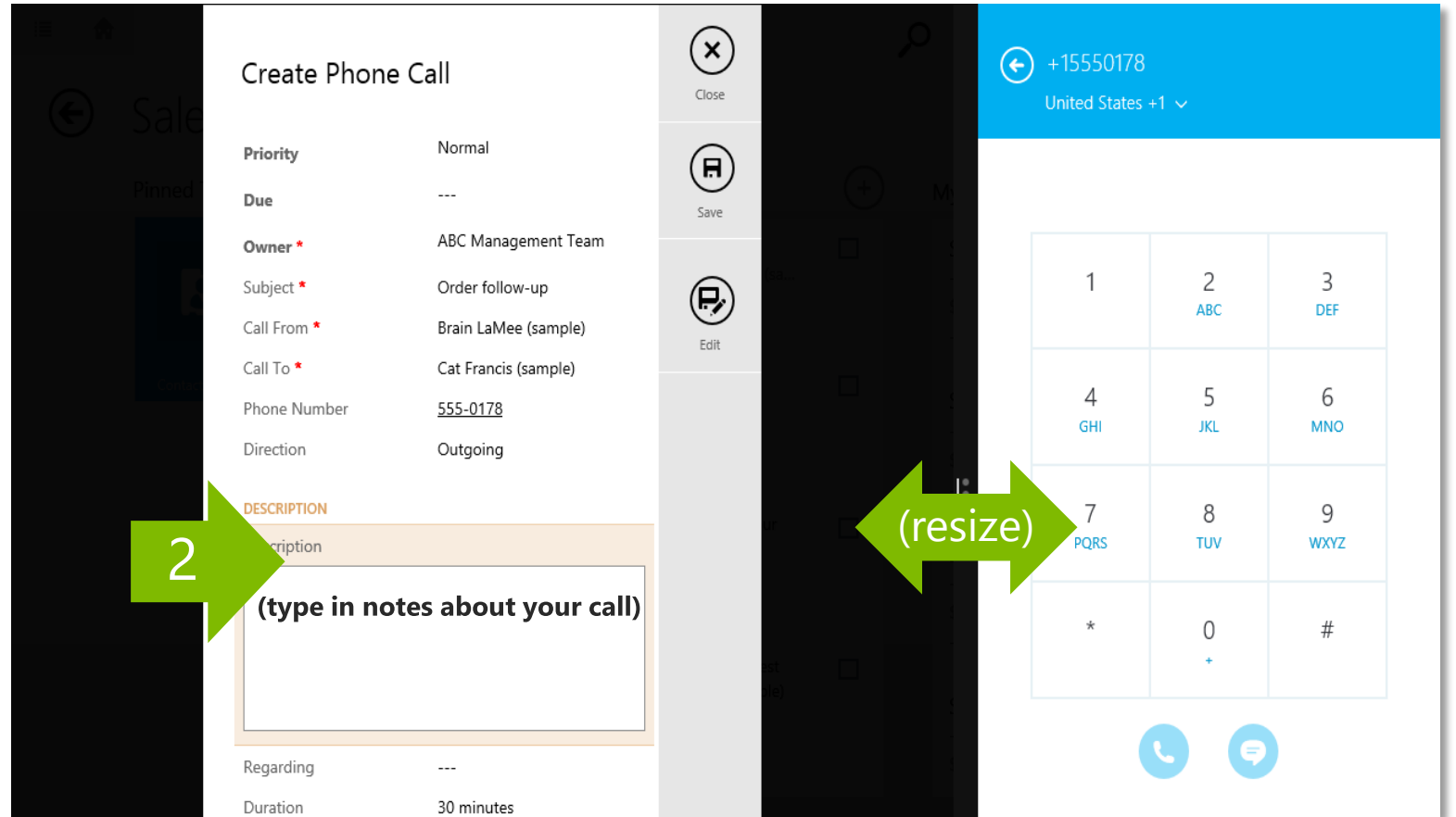
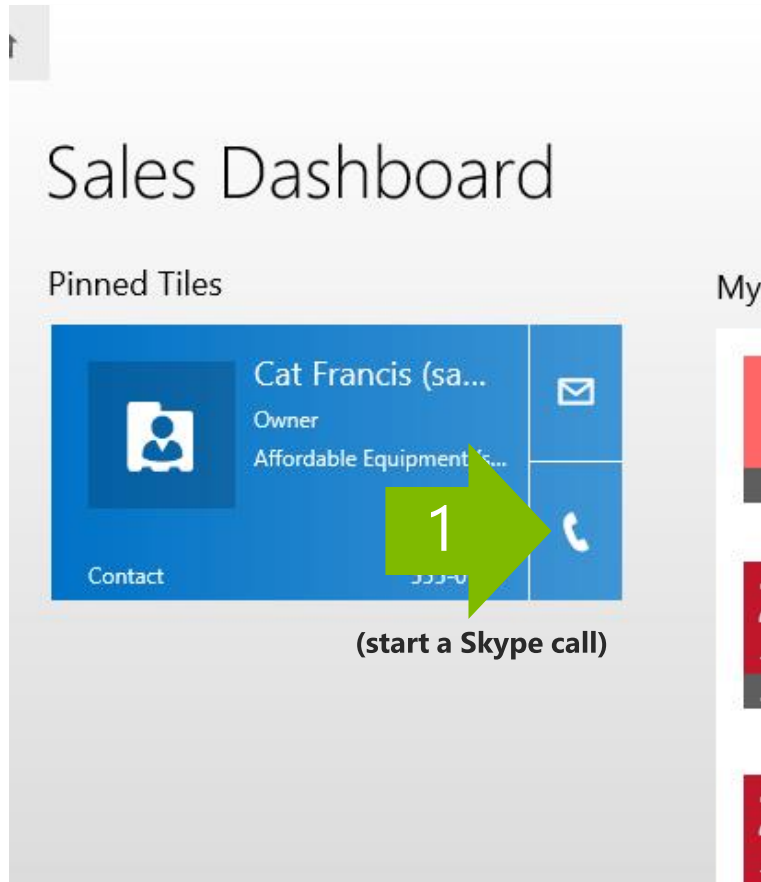
The image shows a CRM interface on a tablet. The main screen is titled "Sales Dashboard" and features several sections: "Pinned Tiles" with a card for "Cat Francis (sample)", "My Activities" with a list of tasks, "My Open Opportunities" with a list of sales opportunities, and "My Contacts". A green arrow labeled "1" points to the "Cat Francis (sample)" tile with the text "(press and hold)".

An expanded view of the "Cat Francis (sample)" communication card is shown on the right. It displays the contact's name, role ("Owner"), company ("Affordable Equipment (s..."), and phone number ("555-0178"). The card includes icons for email and a phone. A green box labeled "Start an email" points to the email icon, and another green box labeled "Start a Skype call" points to the phone icon.

At the bottom of the screen, a green arrow labeled "2" points to a "Larger" button with a magnifying glass icon. A circular arrow icon is located in the bottom right corner.

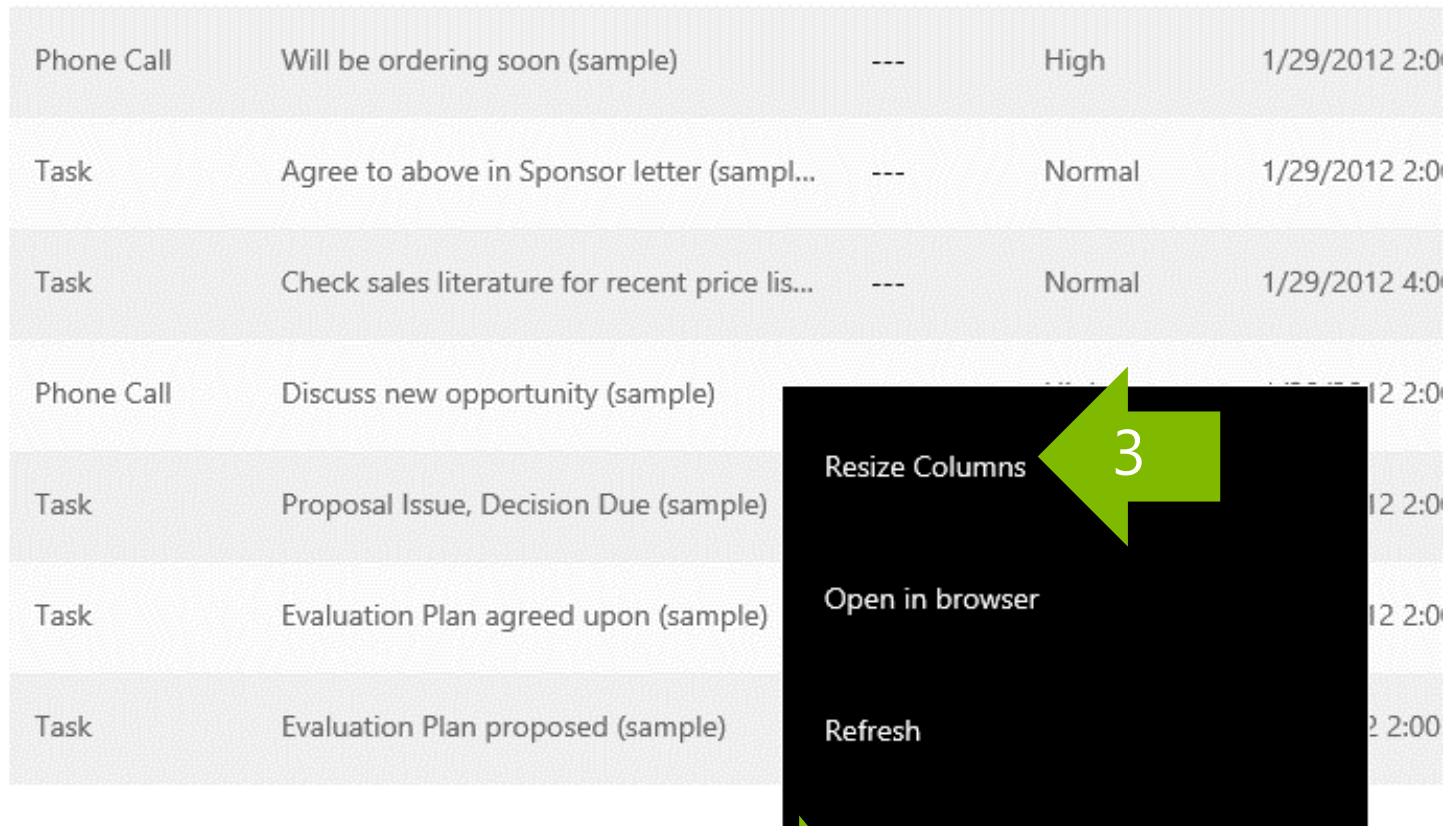
3. Log phone calls while you talk

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.

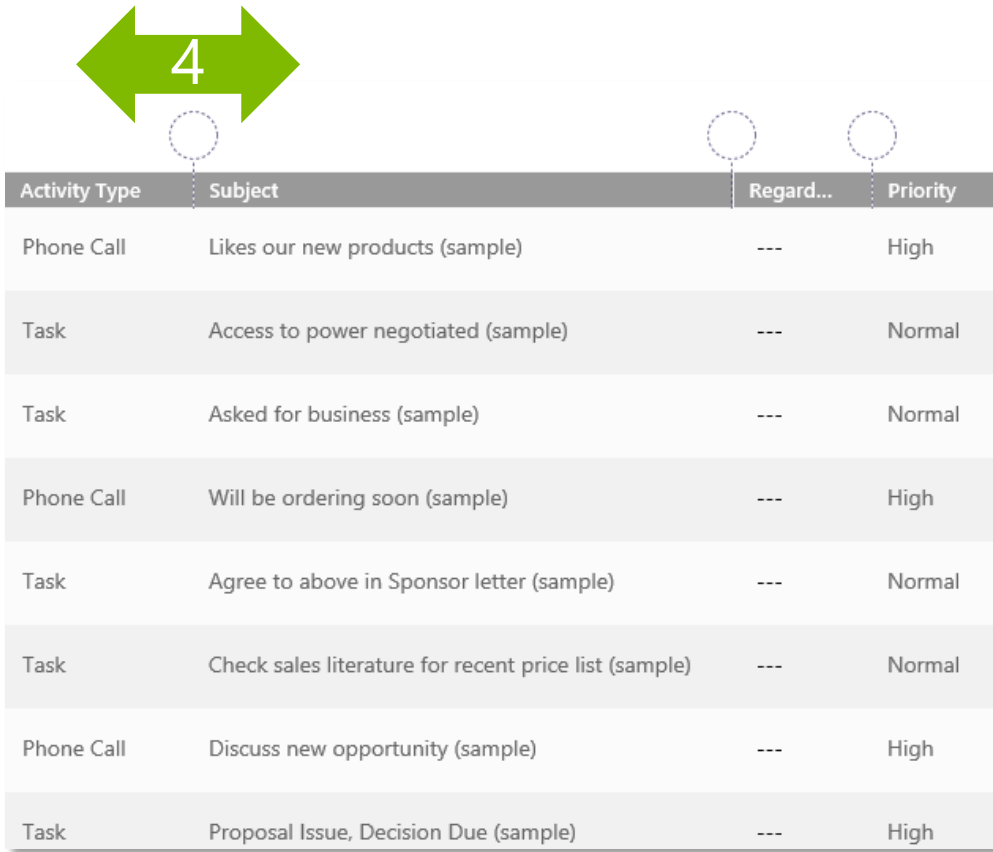


Phone Call	Will be ordering soon (sample)	---	High	1/29/2012 2:00
Task	Agree to above in Sponsor letter (sampl...	---	Normal	1/29/2012 2:00
Task	Check sales literature for recent price lis...	---	Normal	1/29/2012 4:00
Phone Call	Discuss new opportunity (sample)	---	High	1/29/2012 2:00
Task	Proposal Issue, Decision Due (sample)	---	Normal	1/29/2012 2:00
Task	Evaluation Plan agreed upon (sample)	---	Normal	1/29/2012 2:00
Task	Evaluation Plan proposed (sample)	---	Normal	1/29/2012 2:00



More Pin to Start Pin to Dashboard

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



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.

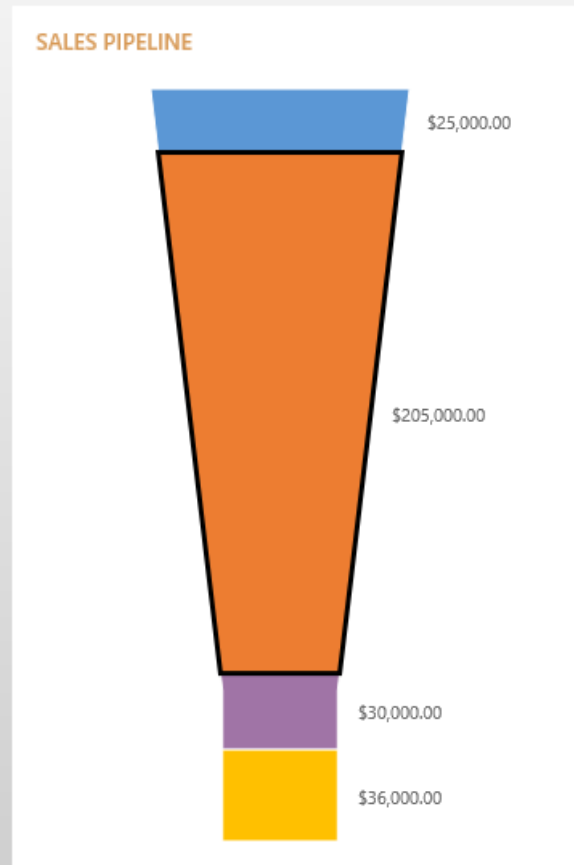
Dashboard

My Active Accounts

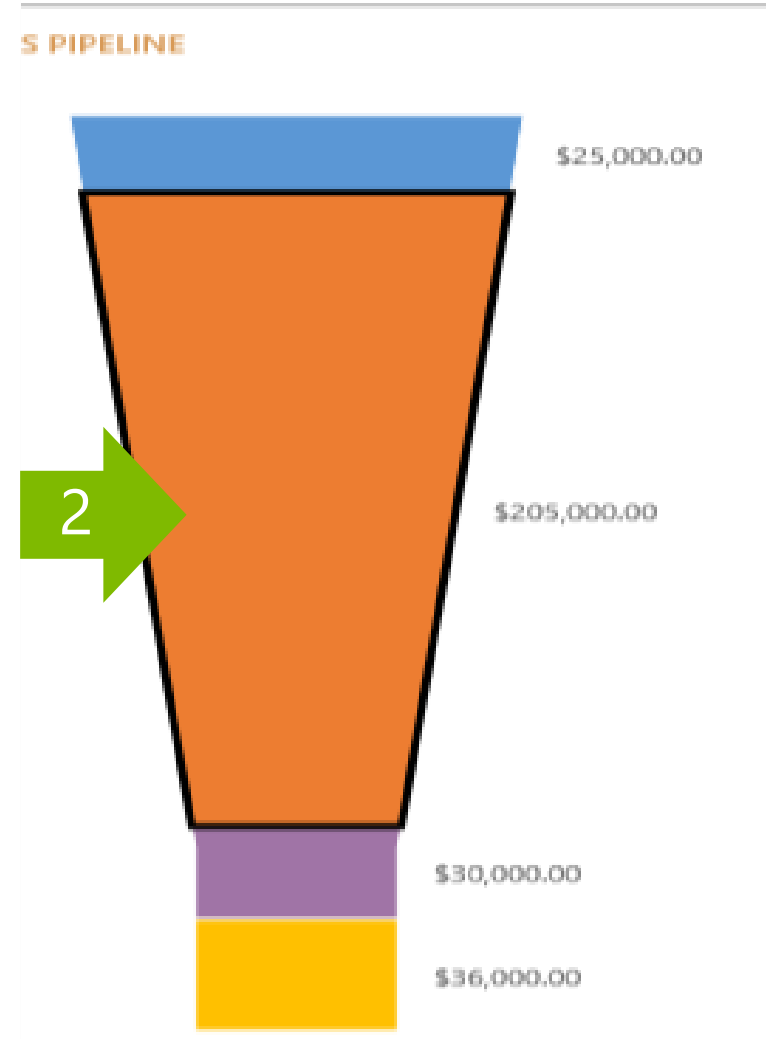
-  A Store (sample)
555-0136
Renton
-  Advanced Components (sample)
555-0135
Dallas
-  Affordable Equipment (sample)
555-0162
Santa Cruz
-  Basic Company (sample)
555-0174
Lynnwood
-  Rest o' Things (sample)



My Open Opportunities



S PIPELINE



Topic
Will expand their
Will order some
Needs to restock



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