

Mobile Express with MS Dynamics CRM

PositiveEdge helps implement plugging mobile computing devices into your Microsoft Dynamics CRM enabling your mobile workforce to instantly view, create and modify your Microsoft Dynamics CRM data.

BUSINESS

Today's business world changes rapidly. Sales avenues are becoming dynamic with sales expanding outside of the conventional territories into the world of mobile devices. The mobile sales representatives often work from remote locations away from the local offices, so from their perspective it is very important to have the ability to receive a real-time quote and access the central database for updates. Recent market trends in the mobility space augmented with the need for delivering analytics on the move to top level executives of its customers.

SOLUTION

An integration of MS Dynamics CRM with mobile devices allows your mobile team to access up-to-the minute sales, marketing and customer service information of your Microsoft Dynamics CRM system on the HTML device of your choice, including Windows mobile, Blackberry and the iPhone.

Below are few of the offerings:

Real time access to customer information

Mobile Express lets your mobile team work with up-to-the minute sales; marketing and customer service information, whether team members are on the road, in client meetings or on service calls.

Full Sales, marketing and Customer Service functionality

This thin-client application, capable of supporting multiple languages, benefits users by allowing them to capture, track and store critical aspects of their sales, marketing and customer service activities while away from the office. Standard and custom entities are supported, including Account, Case, Campaign, Competitor, Marketing List and Opportunity.

Work offline and synchronize

Keep working and access your Microsoft Dynamics CRM data, even if you are disconnected, and synchronize at any time at the availability of network.

Easy to use and manage

The Mobile Express screens are similar to the Microsoft CRM interface, and customized menus at the top of each page lets users easily navigate back to previous screens, further saving time and helping to improve productivity. Simple configuration in Microsoft CRM allows you to choose which entities your mobile workforce can access via Mobile Express.

Easy to configure

Business always demands for new reports day-in and day-out. Hence the Report engine is designed with high configurability and allows configuring reports easily.

Rich Graphical Reports

For high end graphs and charts for reports, the solution leverages "Highcharts". It provided with features to generate different kinds of graphs with ease and also helped create a rich user interface.

A new report engine is capable of delivering reports to any devices and is completely configurable.

The reporting interface is built using new industry standard technologies like HTML5, JSON, JQuery and the like and thus renders data from any source.

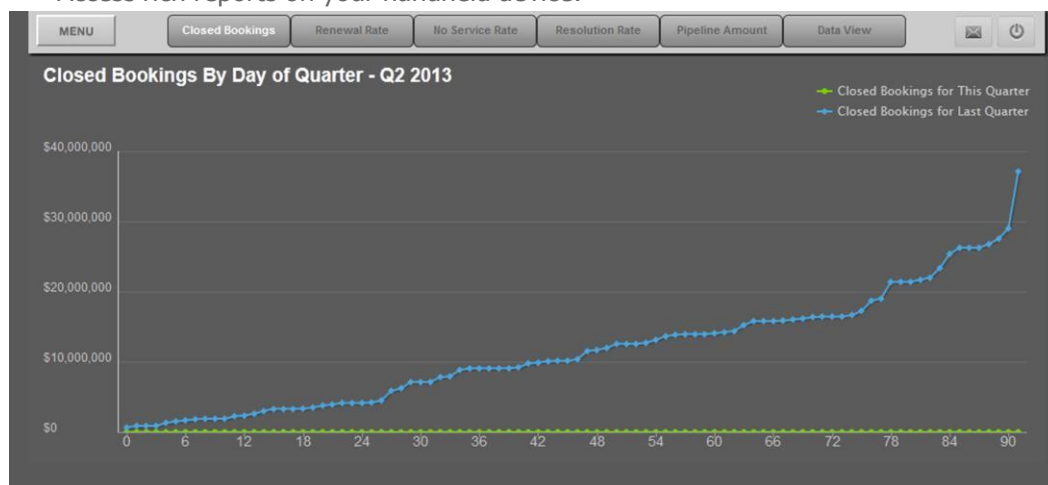
BENEFITS

- Works on any device featuring a web browser.
- Full marketing, sales, and customer service functionality from the road
- Can be easily modified using custom entries to give your sales force the data they need to fit your data access and interface.
- Allows your staff to better serve your client base, thus improving relationships and boosting sales.



Screen Captures

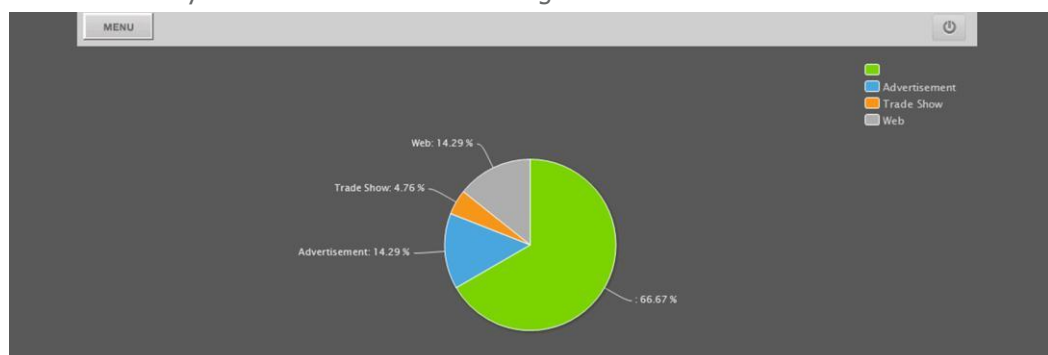
- Access rich reports on your handheld device.



- Drill-down a report to the lowest level.



- Useful analytics for better decision making.



Region: All

Industry: All

Engagement Highlights:

- ✓ Easy to use and manage
- ✓ Stay connected with MS Dynamics CRM on the road
- ✓ Better Usability & Adoption

Platform:

- ✓ Microsoft Dynamics CRM 2011
- ✓ Microsoft Windows 2008 R2

Mobile Device Requirements:

- ✓ HTML 5.0 compatible web browser
- ✓ Internet Access

Tools and Technology used

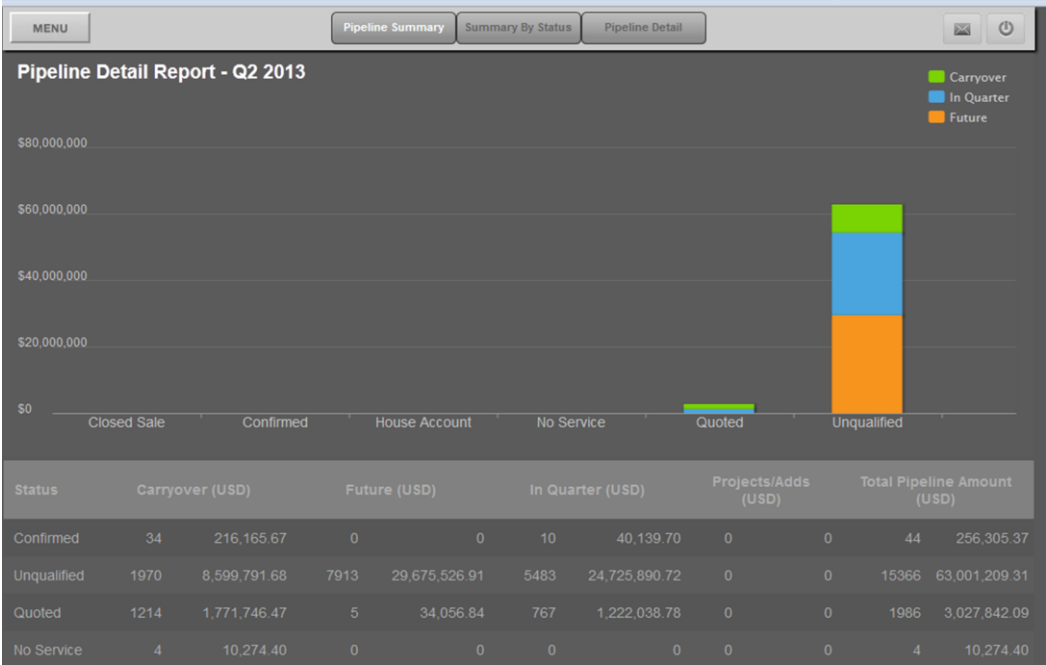
- ✓ Microsoft Dynamics CRM
- ✓ Microsoft .NET Framework 4.0
- ✓ Microsoft Visual Studio 2010

Results:

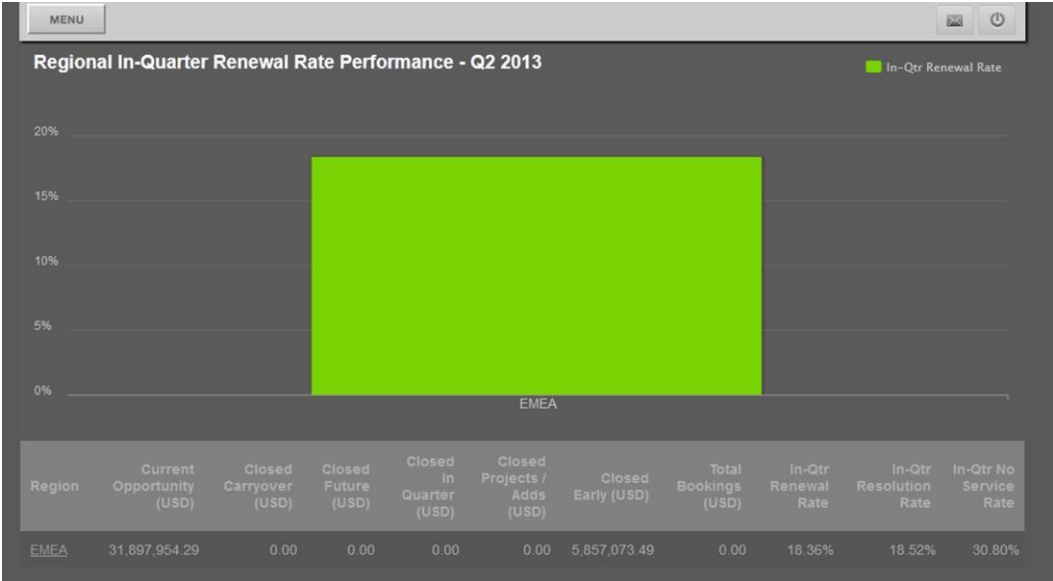
- ✓ Better informed sales team improves service levels
- ✓ Shortens reaction time
- ✓ Improves organization communication.

Screen Captures

- Rich graphical reports.



- Rich reports rendered on latest mobile devices such as Apple iPad.





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For more information about how to discover diamonds in the crevasses between your core systems or to learn more about how PositiveEdge can help, visit www.positiveedge.net or email pprahlad@positiveedgesolutions.com

