Go mobile with Microsoft Dynamics CRM for Tablets

View and edit your CRM data in the tablet 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**

**CRM for Windows 8.1 app**

**CRM for iPad app**

**CRM for Android tablet app**
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.
1. Type in your username.
2. Type in your password.
3. Check the box to stay signed in.
4. Tap **Sign in**.
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

Choose a command on the command bar

- Activate
- Deactivate
- Delete
- Pin to Dashboard
- Pin to Start
- Assign

Press and hold a record or header

Press and hold

Yvonne McKay (sample)
New store opened this year ...
New

Wathalee Steube (sample)
Visited an interest card back ...
New

Teresa Atkinson (sample)
New store opened this year ...
New

Stephanie Conroy (sample)
Interested in online only store...
New
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

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

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 Open Leads

<table>
<thead>
<tr>
<th>Name</th>
<th>Topic</th>
<th>Status Reason</th>
<th>Created On</th>
<th>Company Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yvonne McKay (sample)</td>
<td>New store opened this year - follow-up</td>
<td>New</td>
<td>1/24/2012 2:59 PM</td>
<td></td>
</tr>
<tr>
<td>Jhakone S. Steuber (sample)</td>
<td>Mailed an interest card back (sample)</td>
<td>New</td>
<td>1/24/2012 2:59 PM</td>
<td></td>
</tr>
<tr>
<td>Teresa Atkinson (sample)</td>
<td>New store opened this year - follow-up</td>
<td>New</td>
<td>1/24/2012 2:56 PM</td>
<td></td>
</tr>
<tr>
<td>Stephanie Conroy (sample)</td>
<td>Interested in online only store...</td>
<td>New</td>
<td>1/24/2012 2:56 PM</td>
<td></td>
</tr>
</tbody>
</table>

Yvonne McKay (sample)

Relationships

Summary

- Lead Source: Advertisement
- Rating: Wait
- Status: New
- Owner: Peter Hoyle

Qualify

- Existing Contact: No
- Existing Account: No
- Purchase Timeline: None
- Estimated Budget: None
- Purchase Process: None
- Identify Decision Maker: None
- Capture Summary: None

CONTACT

- First Name: Yvonne
- Middle Name: None
- Last Name: McKay (sample)
- Job Title: Purchasing Manager
- Business Phone: 555-0148
- Mobile Phone: None
- Email: ymckay@email.com

1/10
add records
mark activities complete
search for records
<table>
<thead>
<tr>
<th>Full Name (sample)</th>
<th>Email</th>
<th>Company Name (sample)</th>
<th>Business Phone</th>
<th>First Name (Co...)</th>
<th>Last Name (Co...)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adrian Dumitrascu</td>
<td><a href="mailto:someone.a@example.com">someone.a@example.com</a></td>
<td>A Store (sample)</td>
<td>555-0156</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brain LeMee</td>
<td><a href="mailto:someone.b@example.com">someone.b@example.com</a></td>
<td>Advanced Components (sample)</td>
<td>555-0135</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cat Francis</td>
<td><a href="mailto:someone.c@example.com">someone.c@example.com</a></td>
<td>Affordable Equipment (sample)</td>
<td>555-0178</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cathan Cook</td>
<td><a href="mailto:someone.d@example.com">someone.d@example.com</a></td>
<td>Basic Company (sample)</td>
<td>555-0150</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Darren Parker</td>
<td><a href="mailto:someone.e@example.com">someone.e@example.com</a></td>
<td>Best of Things (sample)</td>
<td>555-0136</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eva Corets</td>
<td><a href="mailto:someone.f@example.com">someone.f@example.com</a></td>
<td>Designer Goods (sample)</td>
<td>555-0178</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forrest Chand</td>
<td><a href="mailto:someone.g@example.com">someone.g@example.com</a></td>
<td>Blue Company (sample)</td>
<td>555-0198</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gabriele Cannata</td>
<td><a href="mailto:someone.h@example.com">someone.h@example.com</a></td>
<td>Elemental Goods (sample)</td>
<td>555-0158</td>
<td></td>
<td></td>
</tr>
<tr>
<td>George Sullivan</td>
<td><a href="mailto:someone.i@example.com">someone.i@example.com</a></td>
<td>Grand Store (sample)</td>
<td>555-0142</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
create communication cards

Press and hold

Sales Dashboard

Pinned Tiles

My Activities

Cat Francis (sample)

My Activities

Pinned Tiles

Cat Francis (sample)

Contact 225-0178

6:00 AM

22 January

5:00 AM

22 January

5:00 AM

23 January

3:00 AM

23 January

3:00 AM

Unpin

Larger
start an email

OR

My Active Contacts

<table>
<thead>
<tr>
<th>Full Name (sample)</th>
<th>Email</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adrian Dumitrascu</td>
<td><a href="mailto:someone_a@example.com">someone_a@example.com</a></td>
<td>A Store</td>
</tr>
<tr>
<td>Brain LaMee</td>
<td><a href="mailto:someone_b@example.com">someone_b@example.com</a></td>
<td>Advance (sample)</td>
</tr>
<tr>
<td>Cat Francis</td>
<td><a href="mailto:someone_c@example.com">someone_c@example.com</a></td>
<td>Affordit (sample)</td>
</tr>
<tr>
<td>Cathan Cook</td>
<td><a href="mailto:someone_d@example.com">someone_d@example.com</a></td>
<td>Basic Co</td>
</tr>
<tr>
<td>Darren Parker</td>
<td><a href="mailto:someone_e@example.com">someone_e@example.com</a></td>
<td>Test o’T</td>
</tr>
<tr>
<td>Eva Corets</td>
<td><a href="mailto:someone_f@example.com">someone_f@example.com</a></td>
<td>Designe (sample)</td>
</tr>
<tr>
<td>Forrest Chand</td>
<td><a href="mailto:someone_g@example.com">someone_g@example.com</a></td>
<td>Blue Cor</td>
</tr>
<tr>
<td>Gabriele Cannata</td>
<td><a href="mailto:someone_h@example.com">someone_h@example.com</a></td>
<td>Element (sample)</td>
</tr>
<tr>
<td>George Sullivan</td>
<td><a href="mailto:someone_i@example.com">someone_i@example.com</a></td>
<td>Grand S</td>
</tr>
</tbody>
</table>
Sales Dashboard

Pinned Tiles

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

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Business Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Store (sample)</td>
<td>555-0156</td>
</tr>
<tr>
<td>Advanced Components (sample)</td>
<td>555-0135</td>
</tr>
<tr>
<td>Affordable Equipment (sample)</td>
<td>555-0178</td>
</tr>
<tr>
<td>Basic Company (sample)</td>
<td>555-0158</td>
</tr>
<tr>
<td>Best o’ Things (sample)</td>
<td>555-0156</td>
</tr>
<tr>
<td>Designer Goods (sample)</td>
<td>555-0138</td>
</tr>
<tr>
<td>Blue Company (sample)</td>
<td>555-0198</td>
</tr>
<tr>
<td>Elemental Goods (sample)</td>
<td>555-0158</td>
</tr>
<tr>
<td>Grand Store (sample)</td>
<td>555-0142</td>
</tr>
</tbody>
</table>
### My Active Accounts

<table>
<thead>
<tr>
<th>Account Name</th>
<th>Phone</th>
<th>City</th>
<th>Primary Contact</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Store (sample)</td>
<td>555-0136</td>
<td>Renton</td>
<td>Adrian Dumitrascu (sample)</td>
<td><a href="mailto:someone_a@example.com">someone_a@example.com</a></td>
</tr>
<tr>
<td>Advanced Components (sample)</td>
<td>555-0135</td>
<td>Dallas</td>
<td>Brain LaFave (sample)</td>
<td><a href="mailto:someone_b@example.com">someone_b@example.com</a></td>
</tr>
<tr>
<td>Affordable Equipment (sample)</td>
<td>555-0162</td>
<td>Santa Cruz</td>
<td>Cat Francis (sample)</td>
<td><a href="mailto:someone_c@example.com">someone_c@example.com</a></td>
</tr>
<tr>
<td>Basic Company (sample)</td>
<td>555-0174</td>
<td>Lynnwood</td>
<td>Cathy Cook (sample)</td>
<td><a href="mailto:someone_d@example.com">someone_d@example.com</a></td>
</tr>
<tr>
<td>Best o' Things (sample)</td>
<td>555-0145</td>
<td>Los Angeles</td>
<td>Darren Parker (sample)</td>
<td><a href="mailto:someone_e@example.com">someone_e@example.com</a></td>
</tr>
<tr>
<td>Blue Company (sample)</td>
<td>555-0131</td>
<td>Redmond</td>
<td>Forrest Chзад (sample)</td>
<td><a href="mailto:someone_f@example.com">someone_f@example.com</a></td>
</tr>
<tr>
<td>Designer Goods (sample)</td>
<td>555-0197</td>
<td>Redmond</td>
<td>Eva Coren (sample)</td>
<td><a href="mailto:someone_g@example.com">someone_g@example.com</a></td>
</tr>
<tr>
<td>Elemental Goods (sample)</td>
<td>555-0227</td>
<td>Missoula</td>
<td>Gabrielle Canno (sample)</td>
<td><a href="mailto:someone_h@example.com">someone_h@example.com</a></td>
</tr>
<tr>
<td>Grand Store (sample)</td>
<td>555-0135</td>
<td>Redmond</td>
<td>George Sullivan (sample)</td>
<td><a href="mailto:someone_i@example.com">someone_i@example.com</a></td>
</tr>
<tr>
<td>Lihware Inc. (sample)</td>
<td>555-0116</td>
<td>Phoenix</td>
<td>Marco Tavara (sample)</td>
<td><a href="mailto:someone_j@example.com">someone_j@example.com</a></td>
</tr>
</tbody>
</table>
### Move handles left or right to resize columns

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Subject</th>
<th>Regard...</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone Call</td>
<td>Likes our new products (sample)</td>
<td>---</td>
<td>High</td>
</tr>
<tr>
<td>Task</td>
<td>Access to power negotiated (sample)</td>
<td>---</td>
<td>Normal</td>
</tr>
<tr>
<td>Task</td>
<td>Asked for business (sample)</td>
<td>---</td>
<td>Normal</td>
</tr>
<tr>
<td>Phone Call</td>
<td>Will be ordering soon (sample)</td>
<td>---</td>
<td>High</td>
</tr>
<tr>
<td>Task</td>
<td>Agree to above in Sponsor letter (sample)</td>
<td>---</td>
<td>Normal</td>
</tr>
<tr>
<td>Task</td>
<td>Check sales literature for recent price list (sample)</td>
<td>---</td>
<td>Normal</td>
</tr>
<tr>
<td>Task</td>
<td>Discussion on opportunity (sample)</td>
<td>---</td>
<td>High</td>
</tr>
<tr>
<td>Task</td>
<td>Proposal Issue, Decision Due (sample)</td>
<td>---</td>
<td>High</td>
</tr>
<tr>
<td>Task</td>
<td>Evaluation Plan agreed upon (sample)</td>
<td>---</td>
<td>High</td>
</tr>
<tr>
<td>Task</td>
<td>Evaluation Plan proposed (sample)</td>
<td>---</td>
<td>High</td>
</tr>
</tbody>
</table>

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

View all records for the chart

My Open Opportunities

View records for chart section

SALES PIPELINE

$11,000,000.00
$4,000,000.00
$7,000,000.00
show a different chart
choose a different chart view
open a record in your web browser

Yvonne McKay (sample)
Thanks for reading!

Did this eBook help you? Send us a quick note. We’d love to know what you think.

Customer Center

Version 6.1.0