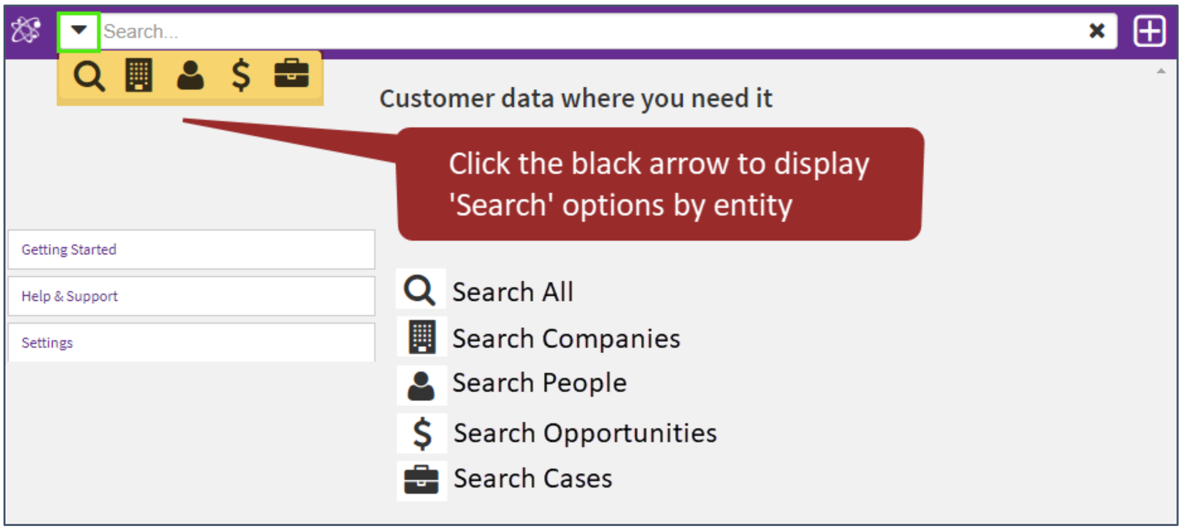
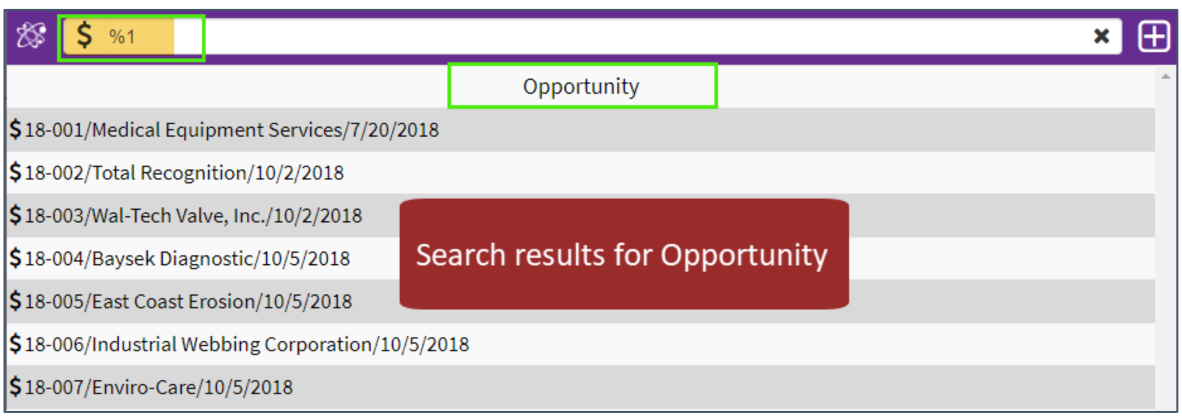
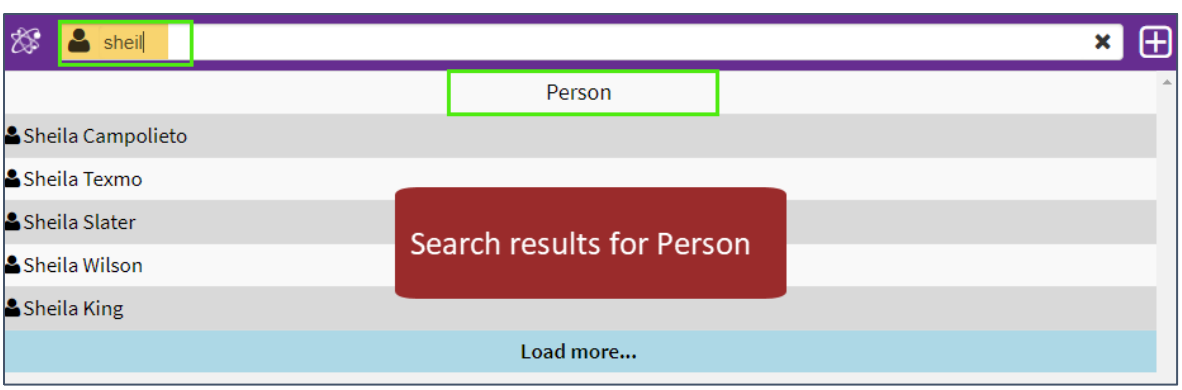
MobileX

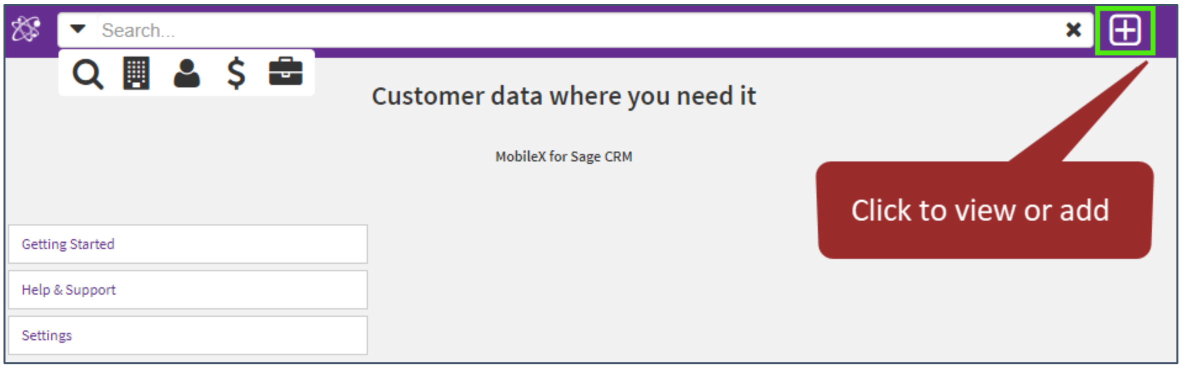
SEARCHING

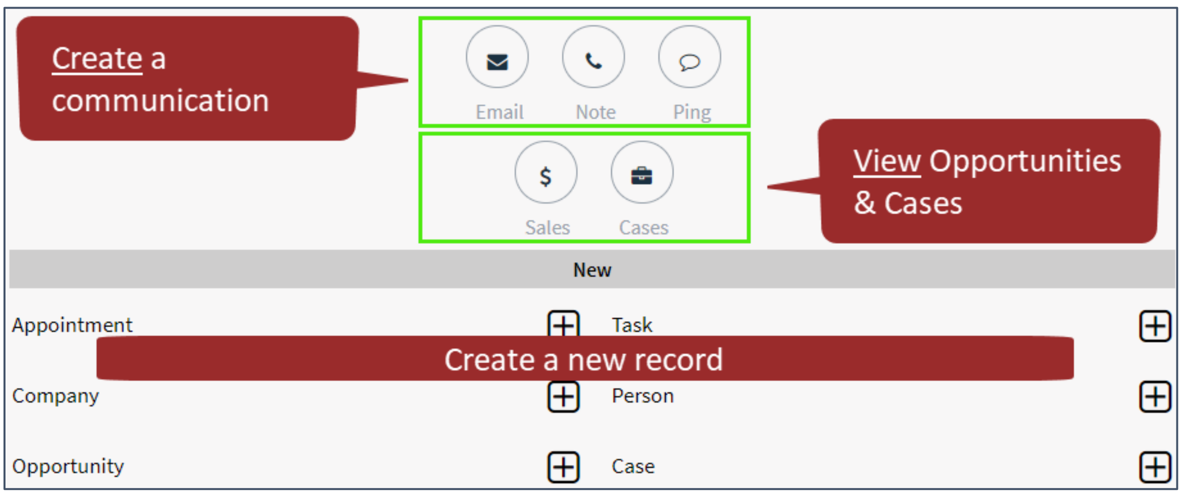






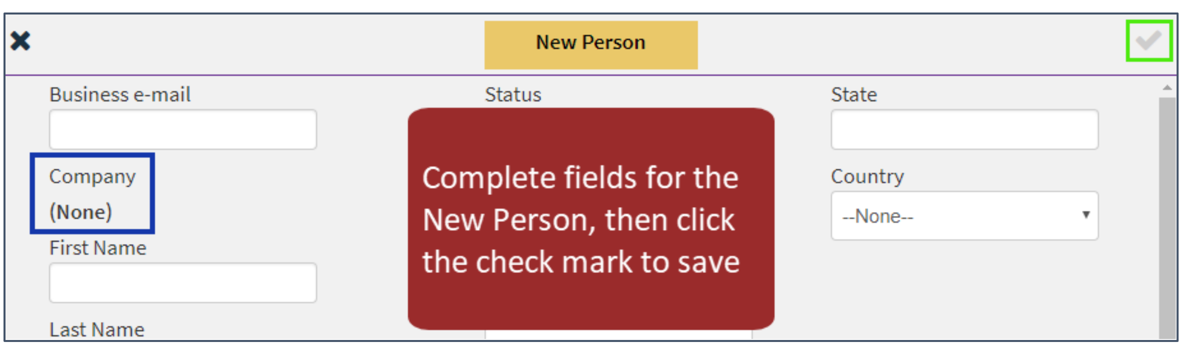
VIEWING AND ADDING



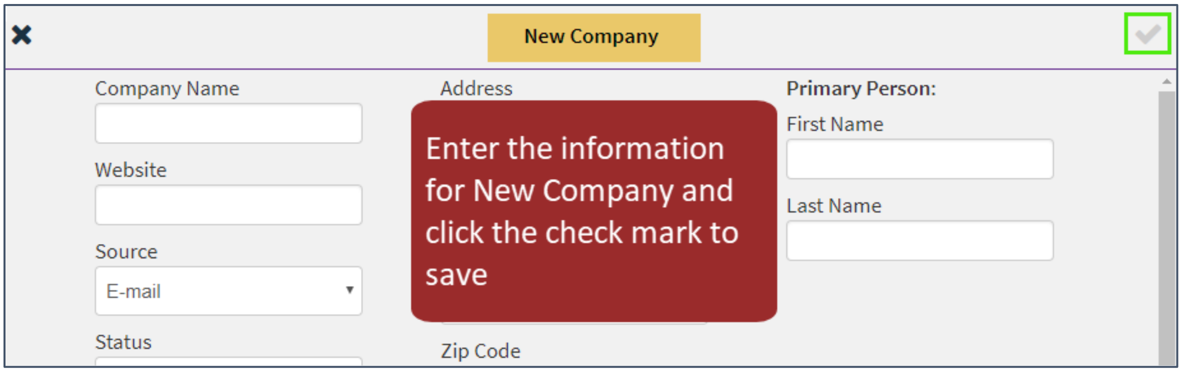


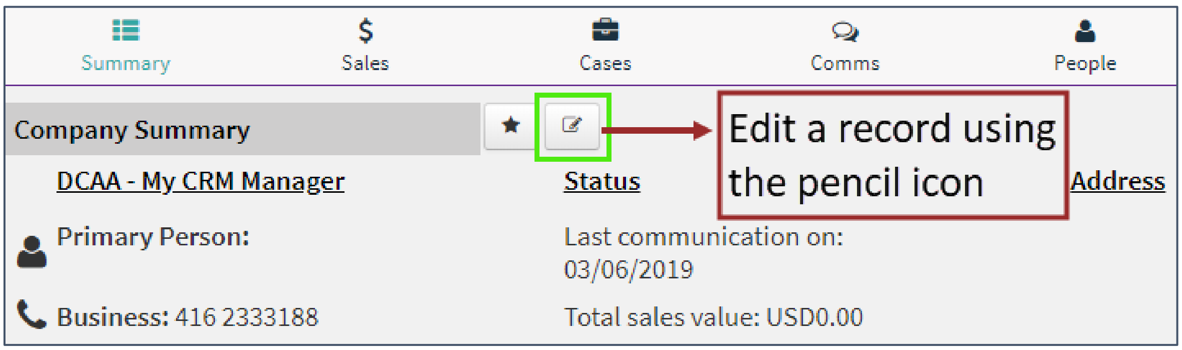
NEW PERSON

If you do not create the New Person from a Company record, the Company will show up as 'None' (see below); your System Administrator can later merge the New Person to a Company from Sage CRM

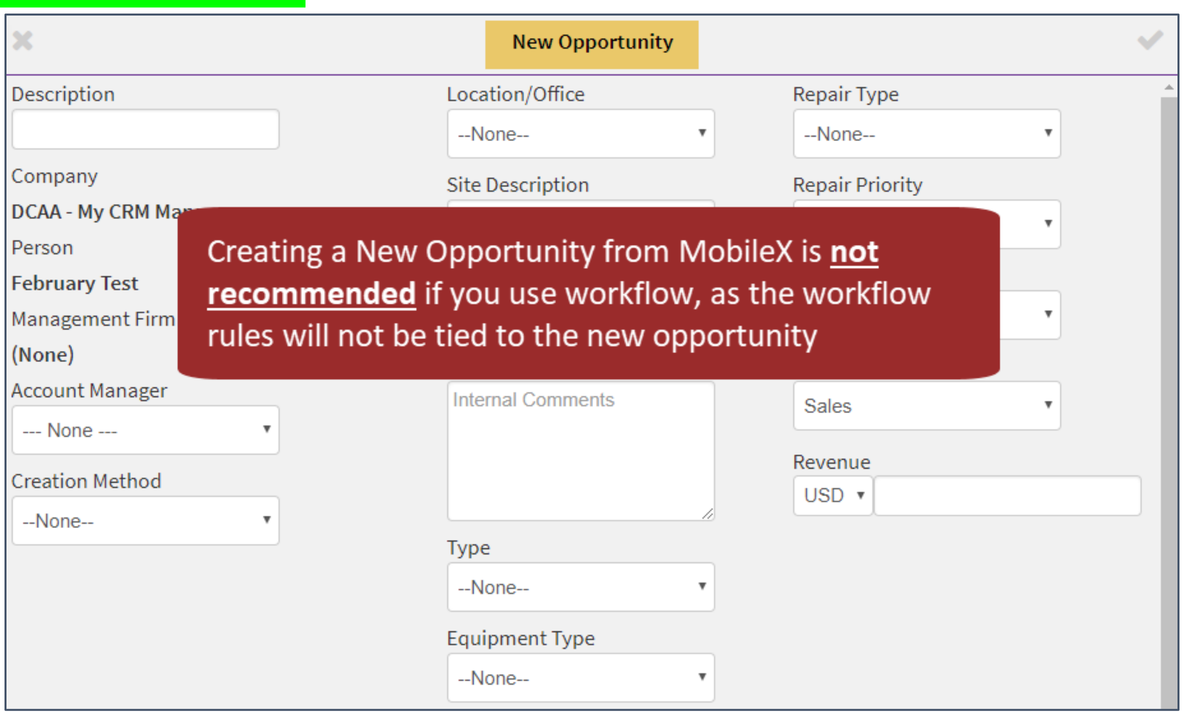


NEW COMPANY



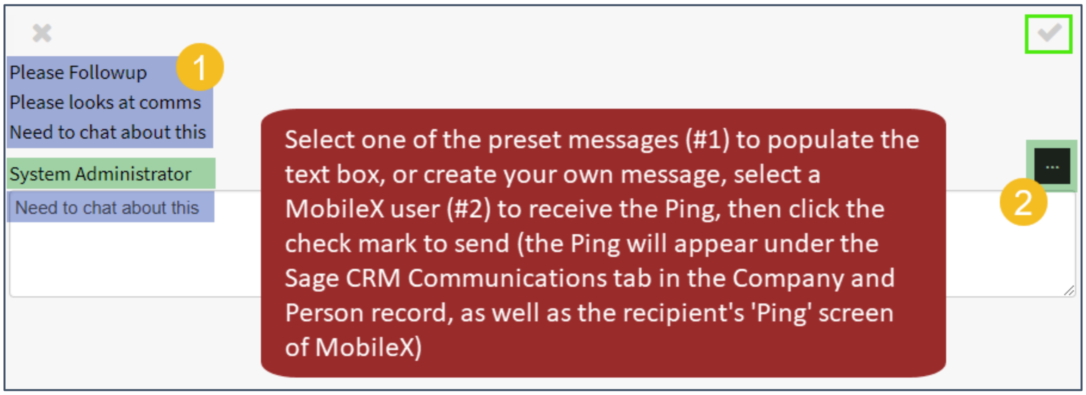


NEW OPPORTUNITY

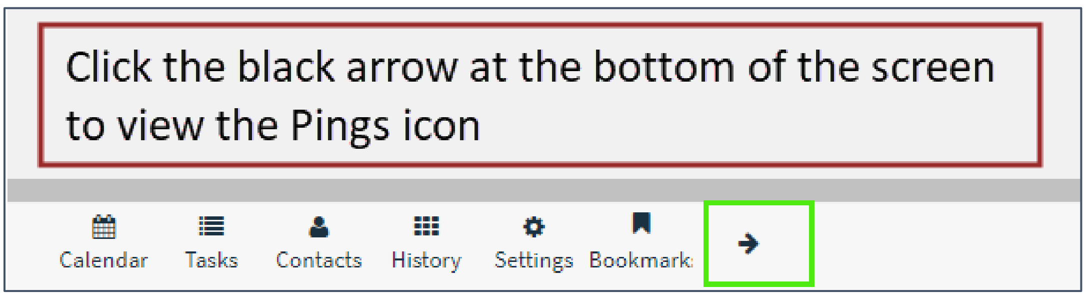


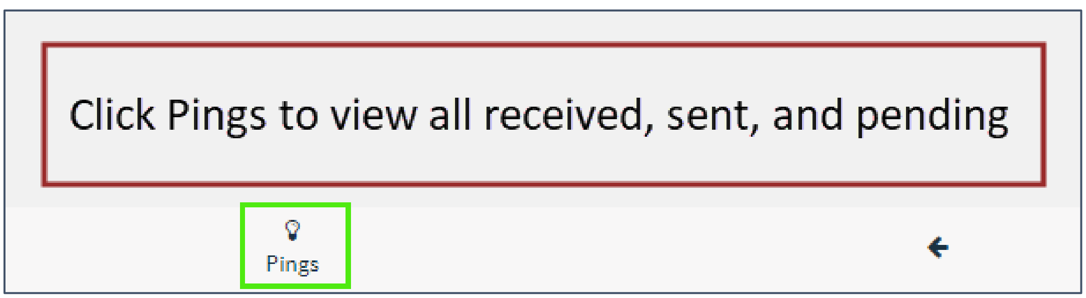
NEW PING

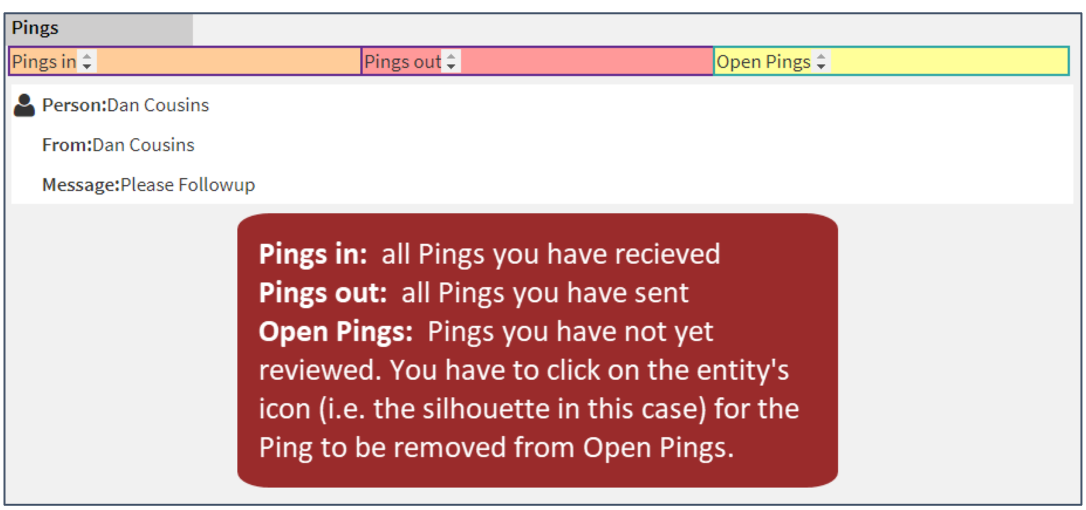
To send a Ping:



To view a Ping:

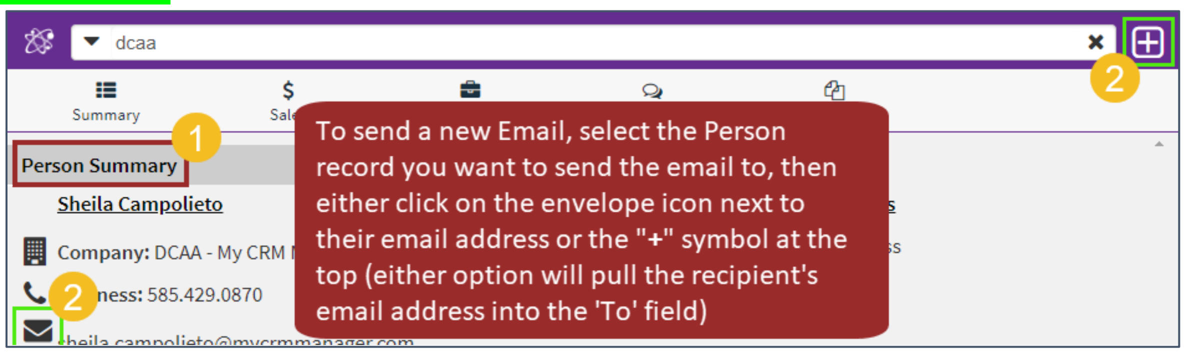


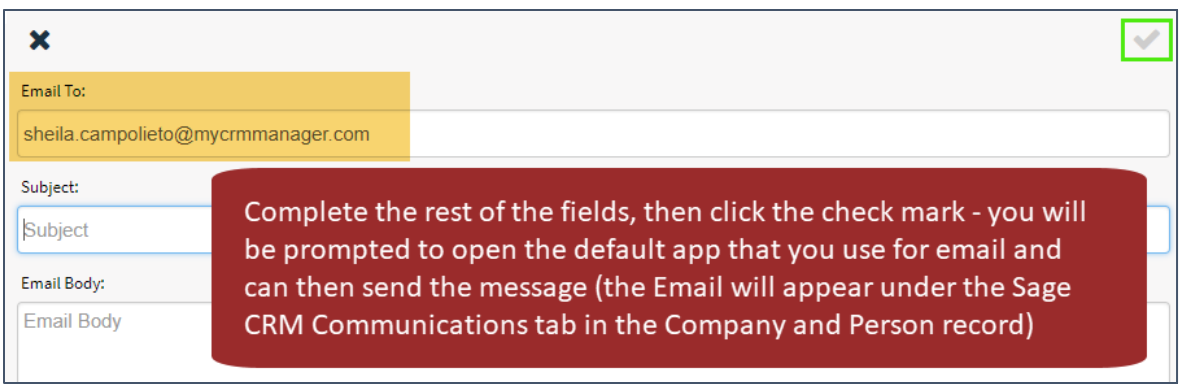




NEW APPOINTMENT

NEW EMAIL





ADDING FILES

Go to the record that you want to upload the file to (i.e. a Company or Person)

The uploaded file will also be saved under the Documents tab of the chosen record in Sage CRM