

MobileX

SEARCHING

Search...

Customer data where you need it

Click the black arrow to display 'Search' options by entity

- Search All
- Search Companies
- Search People
- Search Opportunities
- Search Cases

Getting Started

Help & Support

Settings

\$ %1

Opportunity

- \$ 18-001/Medical Equipment Services/7/20/2018
- \$ 18-002/Total Recognition/10/2/2018
- \$ 18-003/Wal-Tech Valve, Inc./10/2/2018
- \$ 18-004/Baysek Diagnostic/10/5/2018
- \$ 18-005/East Coast Erosion/10/5/2018
- \$ 18-006/Industrial Webbing Corporation/10/5/2018
- \$ 18-007/Enviro-Care/10/5/2018

Search results for Opportunity

sheil

Person

- Sheila Campolieto
- Sheila Texmo
- Sheila Slater
- Sheila Wilson
- Sheila King

Load more...

Search results for Person

VIEWING AND ADDING

Customer data where you need it

MobileX for Sage CRM

Getting Started

Help & Support

Settings

Click to view or add

Create a communication

Email Note Ping

Sales Cases

View Opportunities & Cases

New

Appointment Task

Company Person

Opportunity Case

Create a new record

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 Person

Business e-mail

Company (None)

First Name

Last Name

Status

State

Country --None--

Complete fields for the New Person, then click the check mark to save

NEW COMPANY

✕
New Company
✓

Company Name <input type="text"/> Website <input type="text"/> Source E-mail ▾	Address <div style="background-color: #800000; color: white; padding: 10px; text-align: center; margin: 5px 0;"> Enter the information for New Company and click the check mark to save </div> Zip Code	Primary Person: First Name <input type="text"/> Last Name <input type="text"/>
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Summary
Sales
Cases
Comms
People

Company Summary
★
✎
Edit a record using the pencil icon

DCAA - My CRM Manager
Status
Address

Primary Person:
 Business: 416 2333188

Last communication on:
 03/06/2019

 Total sales value: USD0.00

NEW OPPORTUNITY

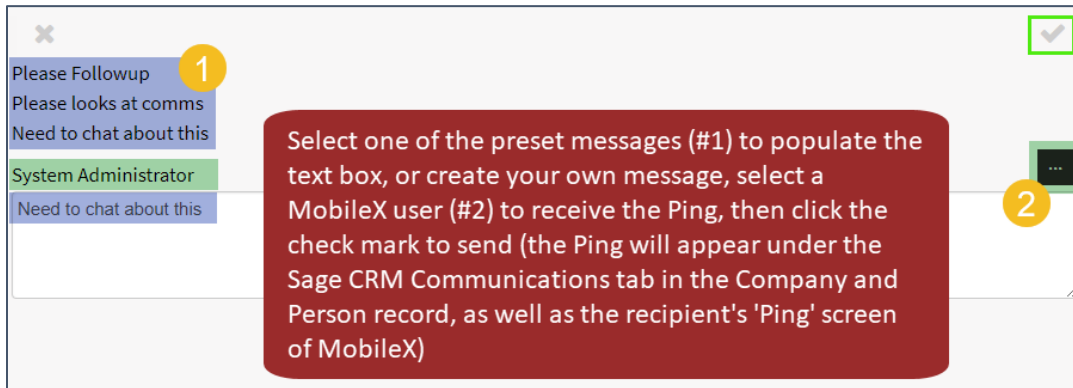
✕
New Opportunity
✓

Description <input type="text"/> Company DCAA - My CRM Manager Person February Test Management Firm (None) Account Manager --- None --- ▾ Creation Method --None-- ▾	Location/Office --None-- ▾ Site Description <input type="text"/> Internal Comments <input type="text"/> Type --None-- ▾ Equipment Type --None-- ▾	Repair Type --None-- ▾ Repair Priority --- ▾ Sales --- ▾ Revenue USD ▾ <input type="text"/>
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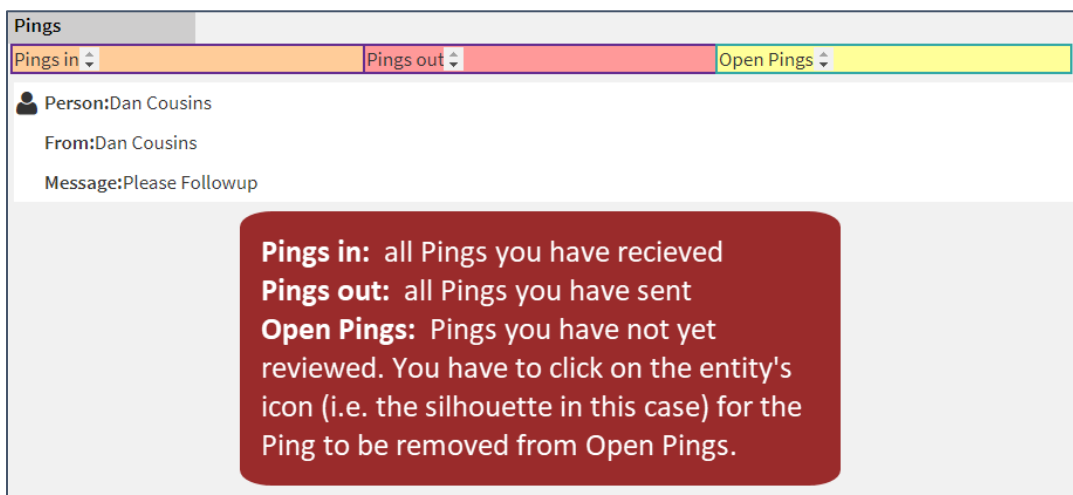
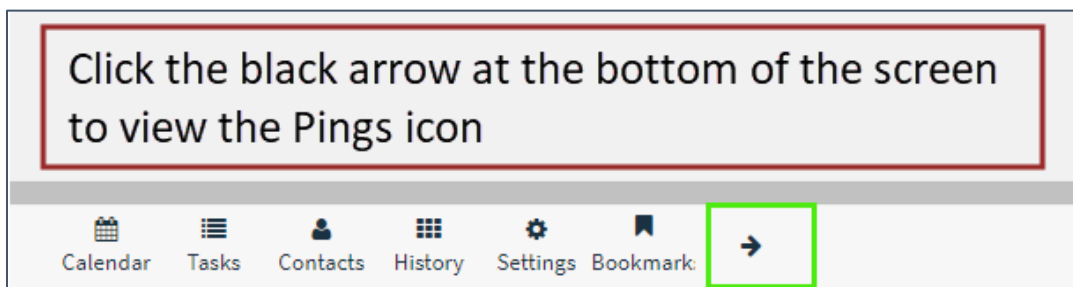
Creating a New Opportunity from MobileX is **not recommended** if you use workflow, as the workflow rules will not be tied to the new opportunity

NEW PING

To send a Ping:



To view a Ping:



NEW APPOINTMENT

Complete fields for the new Appointment, then click the check mark to save (the Appointment will appear under the Sage CRM Communications tab in the Company and Person record, as well as your Sage CRM Calendar)

NEW EMAIL

To send a new Email, select the Person record you want to send the email to, then either click on the envelope icon next to their email address or the "+" symbol at the top (either option will pull the recipient's email address into the 'To' field)

Complete the rest of the fields, then click the check mark - you will be prompted to open the default app that you use for email and can then send the message (the Email will appear under the Sage CRM Communications tab in the Company and Person record)

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

The screenshot shows the Sage CRM interface with navigation tabs: Summary, Sales, Cases, Comms, People, and Files. The Files tab is highlighted with a green box and a yellow circle containing the number 1. Below the tabs is the 'Company Summary' for 'DCAA - My CRM Manager'. The record details are organized into three columns: Primary Person (Dan Cousins, Business: 416 233.3188), Status (Last communication on: Fri Apr 19 00:00:00 EDT 2019, Total sales value: USD0.00, 1 open sale(s) forecasting at USD0.00, Open Cases: 1), and Address (2869 Bloor Street West, Suite 279, Etobicoke ON M8X 1B3, Canada).

The screenshot shows the 'Documents' tab selected. A green box highlights the upload icon (a square with a downward arrow) and a yellow circle with the number 2. Below it, a 'Choose File' button is highlighted with a green box and a yellow circle with the number 3. A text area contains the date 'April 3, 2019'. A 'Save' button with a floppy disk icon is highlighted with a green box and a yellow circle with the number 4. A red callout box points to the text area with the text: 'Optional - this note will appear under Description in Sage CRM'.

The screenshot shows two files uploaded to the Documents tab. The first file is an image, with a download icon (a square with a downward arrow) highlighted by a green box. Below it, the filename is 'Image-1.jpg' and a small thumbnail of the image is visible. The second file is a PDF, also with a download icon highlighted by a green box. Below it, the filename is 'Sage_CRM_installation_checklist_Sage_100_(Greytrix_version).pdf'. A red callout box contains the text: 'Files will appear as an image or a file, depending on the file type that was chosen and saved' and 'Click on the black arrow to download and open the file'.