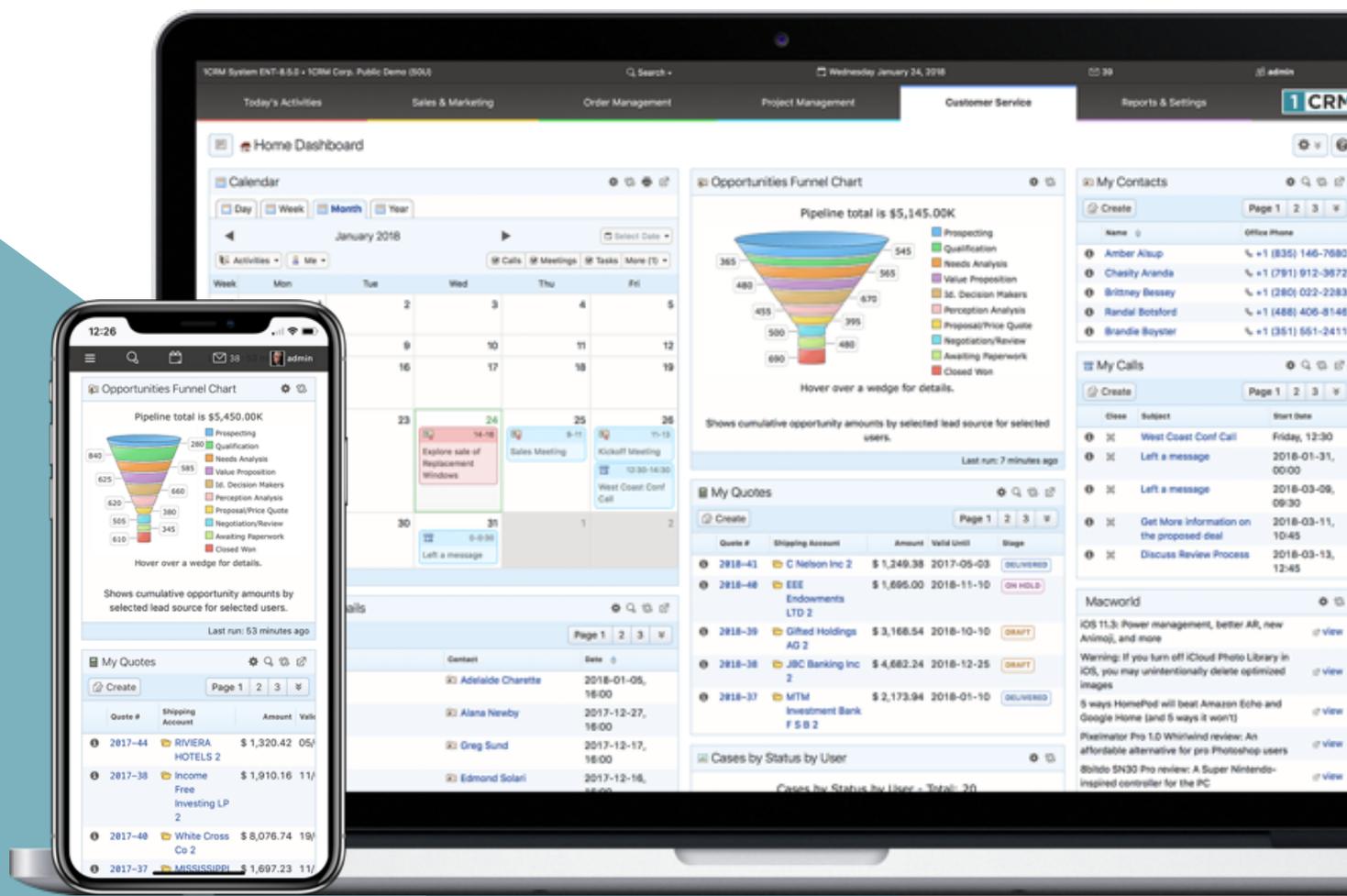


1CRM MOBILE USER GUIDE

Your Complete Guide to Using 1CRM on Mobile Devices



Navigating This Guide:

This Guide has been designed to be helpful both as a printed document, and as an electronic document accessed on your computer screen. If you are accessing it via a PDF viewer such as Acrobat Reader or Mac Preview, please notice:

1. The Table of Contents entries are all live hyperlinked to the pages to which they refer.
2. At the top of each page there is a link back to the start of the Table of Contents.
3. Be sure to use the search feature of your PDF reader.

Version 1.7, September, 2021. This document is subject to change without notice.

Disclaimer

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688 Falkland Road
Victoria, British Columbia
Canada V8S 4L5

www.1crm.com

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1.0 Welcome

Thank you for using 1CRM! This Guide exists to explain the various options you have when using 1CRM on Mobile devices.

Principally, you have four main approaches available to you, and you may use any or all of them to optimize the value you get from your 1CRM system while mobile:

- CRMFlex™ Mobile Browser Access: The full 1CRM system is available on your smartphone: 1CRM will sense you are on a device with a very narrow screen and present the normal 1CRM information on rearranged (*'responsive'*) screen layouts.
- CRMSync™: Syncs Contacts and Calendar info bi-directionally with iOS (iPad, iPhone) or Android mobile devices. This feature provides handy access on your phone or tablet to view, edit and add 1CRM contacts, appointments and reminders/tasks while online or offline, in the standard Contacts and Calendar apps on your mobile device.
- 1CRM Client App for iPhone, iPad and Mac: In addition to CRMFlex browser access provided by 1CRM, there is a free Apple app available for Apple devices in the App Store, for use with all 1CRM Editions.
- 1CRM Mobile for Android: In addition to CRMFlex browser access provided by 1CRM, there is a free Android app available in the Google Play Store, for use with all 1CRM Editions.

The following pages explain each of these four approaches in turn.

1.1 Revision History

Revision 1.0 - June 2016

Revision 1.1 - July 2016 - Added 1CRM Mobile content: Home screen, 3D Touch Support, Cases Module, plus Localization and support for French, German and Spanish languages.

Revision 1.2 - September 2016 - Added 1CRM Mobile content: Documents module, file attachments for Notes, App Data Sharing, and OAuth client support for a more secure connection to 1CRM.

Revision 1.3 - November 2016 - Added 1CRM Mobile content: Filter and Sort controls for all list views; Notifications for Calls, Meetings and Tasks; Support for displaying and filtering by Favourites.

Revision 1.4 - December 2017 - Added information about responsive CRMFlex browser access included in 1CRM version 8.5 and later.

Revision 1.5 - June 2018 - Expanded information about CRMFlex browser access included in 1CRM version 8.5 and later, and about the 1CRM Mobile for Android App.

Revision 1.6 - April 2021 - Added details for the new 1CRM Client App for iOS, iPadOS, macOS.

Revision 1.7 - September 2021 - Removed the 1CRM Mobile iOS App.

2.0 CRMFlex for Android & iOS

Anywhere, any device, any time. That has to be the mantra in today's business world for how you respond to your clients' needs. Accordingly, 1CRM is designed as much for use on smartphones and tablets as it is for laptop and desktop computers. The ability of 1CRM to adapt its screen presentation to best suit the screen size of the device you are using is called *CRMFlex*. (In computer terminology, 1CRM is *responsive*.)

To take advantage of CRMFlex simply enter the normal URL for your 1CRM system in the address bar of your smartphone or tablet browser, and login using your usual username and password.

Let's have a quick look at the same 1CRM screen, as seen in the browser of different devices:

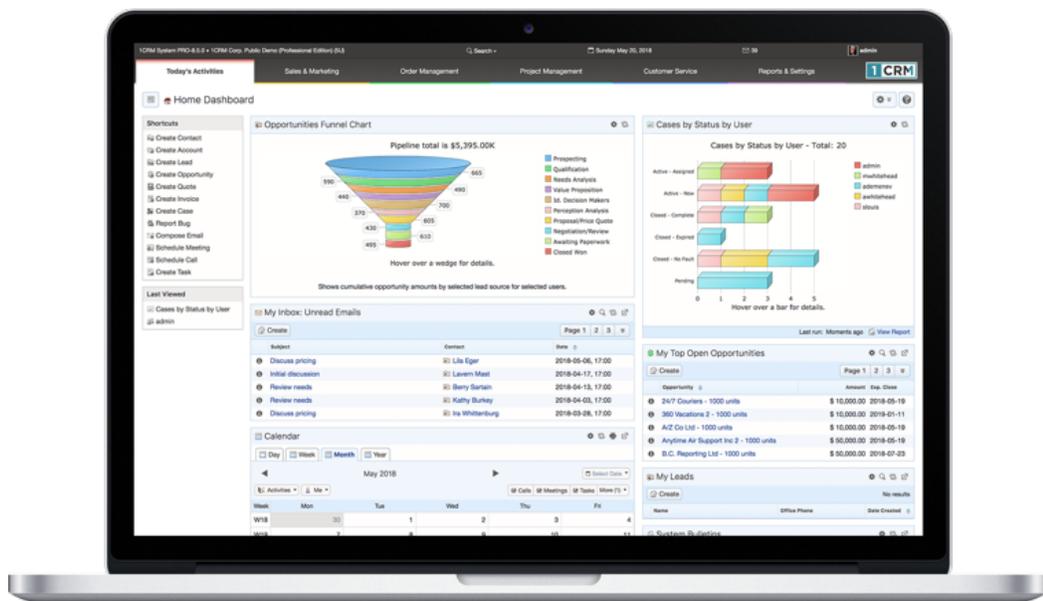


Figure 1: MacBook Pro 13" (Chrome)

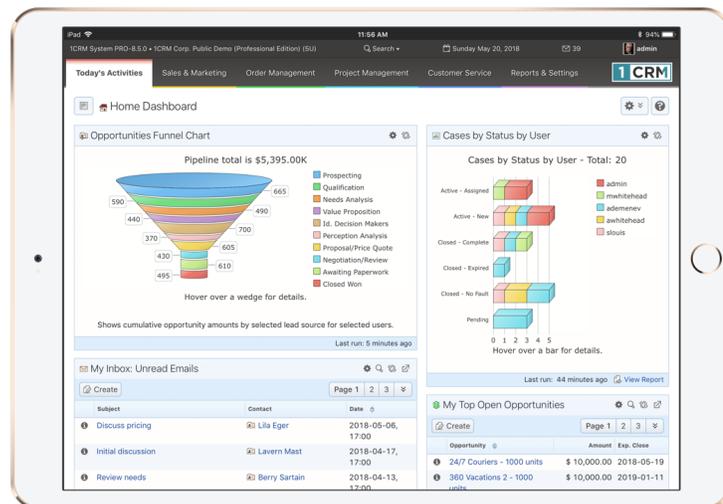


Figure 2: iPad Pro 10.5" landscape mode (Firefox)

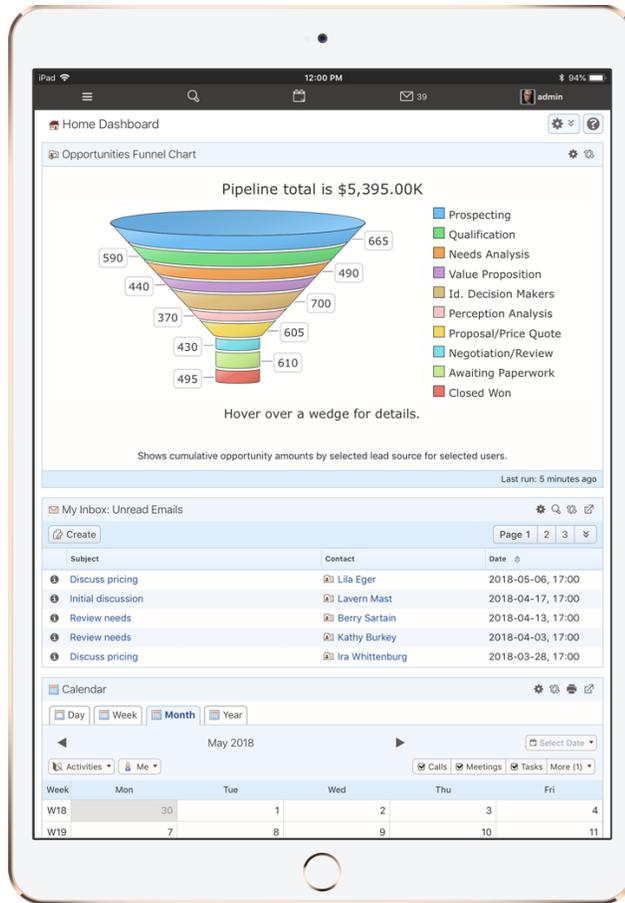


Figure 3: iPad Pro 10.5" Portrait mode (Firefox)

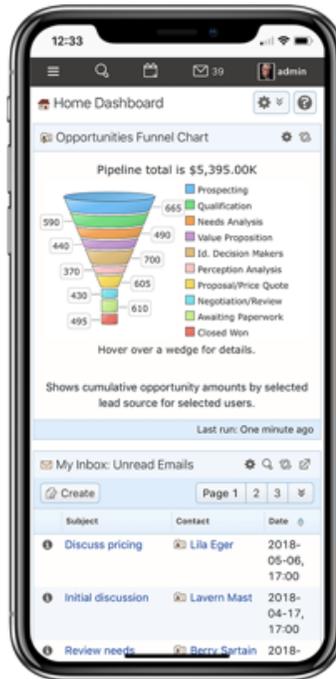


Figure 4: iPhone X (Firefox)

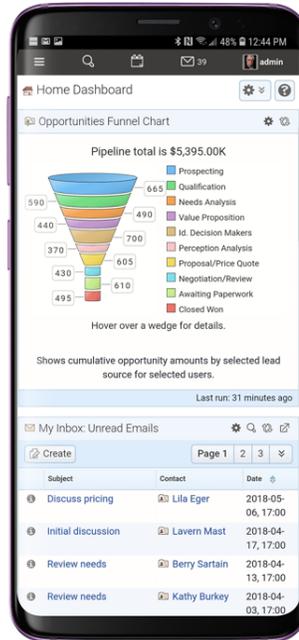


Figure 5: Samsung Galaxy S9+ (Chrome)

What we notice is that while clearly we see different amounts of data on each device, the way data is presented and the way the system is navigated is very similar across all devices. This way you don't have to learn all new techniques to use 1CRM on different devices.

Some of the key points you should know include:

Smartphone Layout Mode

- CRMFlex shifts to Smartphone Layout mode when the width of your browser screen is typical for a smartphone. We recommend you use a smartphone with at least a 4.7" screen, such as an iPhone 6/7/8, to ensure the best experience.
- Claro theme is used, regardless of the theme you have selected. Your selected theme will be used on other devices.
- The complete 1CRM system is available to you: all modules plus administration. Even modules that you might expect to require larger screens, such as Quotes and Invoices, have been adapted for elegant smartphone operation.
- The menu system is now condensed, and accessed via a *hamburger* style icon  on the left end of the top bar.
- The sidebar that contains shortcuts and last viewed items is not shown.
- Shortcuts are available when you tap the menu icon . (See Figure 7)
- Last viewed items are available when you tap on Search. (See Figure 8)
- Dashboards all adopt a single column layout.
- When you click on phone numbers within 1CRM, you can choose if dialling will use the phone in your smartphone, or an app corresponding to your system's chosen IP Telephony service (Skype or RingCentral).
- On both Android smartphones and iPhones you can add an icon for 1CRM to the home screen of your device, so that you access 1CRM just as you would any smartphone app.

Tablet Layout Mode

- CRMFlex shifts to Tablet Layout mode when the width of your browser screen is typical for a tablet.
- If you are using a tablet device in landscape mode to access 1CRM, such as an iPad, iPad Pro or iPad mini, you will usually (depending on tablet size) see the normal full 1CRM menu bar interface as shown in Figure 2. Dashboards will not be forced to single column mode. The sidebar is collapsed by default, but as usual it may be expanded by the  button found near the left edge of the screen.
- With a tablet in portrait mode you will usually see the smartphone type condensed menu bar as shown in Figure 3. Dashboards will adopt a single column layout, and the sidebar that contains shortcuts and last viewed items is not shown.
- We recommend an iPad Air, Pro or Mini with LTE support as a very compact mobile device with which to use 1CRM. Or just link to your phone for an Internet connection using Apple's *Personal Hotspot* feature.
- Your selected theme will be used: Claro theme is not enforced.

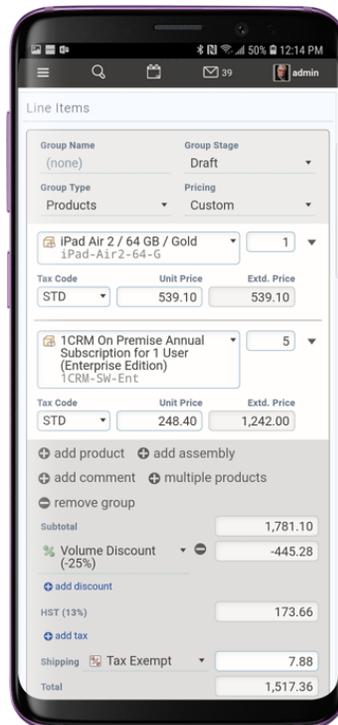


Figure 6: Preparing a Quote in Smartphone Layout Mode (Galaxy S9+)

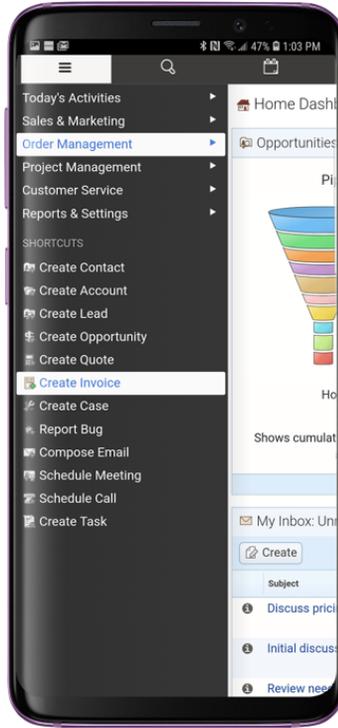


Figure 7: Smartphone Menu & Shortcuts (Galaxy S9+)

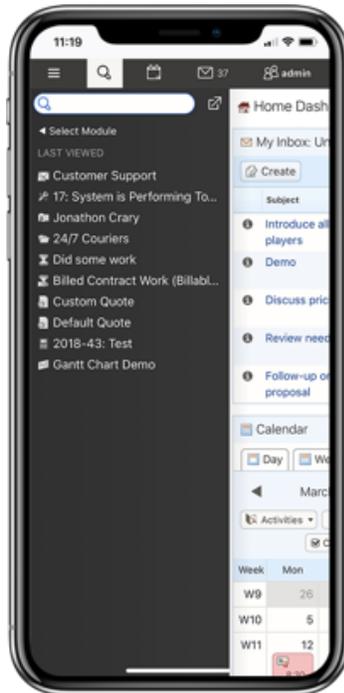


Figure 8: Smartphone Search & Last Viewed (on iPhone X)

3.0 CRMSync for iOS / Android

CRMSync syncs Contacts and Calendar info bi-directionally with iOS (iPad, iPhone) or Android mobile devices. This feature provides handy access on your phone or tablet to view, edit and add 1CRM contacts, appointments and reminders/tasks while online or offline, in the standard Contacts and Calendar apps on your mobile device. The CRMSync feature is configured by each user of 1CRM in their *My Account* screen, on the *Integration* tab (Figure 3)

3.1 CRMSync for Contacts

The CRMSync feature in 1CRM uses a CardDAV server to provide excellent Contact data exchange capabilities. To use the CRMSync feature, simply set the option here to choose what Contacts to sync: *Assigned To Me*, *All I Can See* or *My Favorites*. Enable *Automatically create Accounts* if you would like incoming synched Contacts to create new Accounts for the company names in their Contact records, if they do not already exist as 1CRM Accounts.

Next, in any other system that supports CardDAV, such as Contacts on macOS, or iOS (for iPhone and iPad), Android phones and tablets, or Microsoft Outlook (via a number of Outlook add-on options), simply subscribe to the CardDAV service using the *Principal* or *Address Book* URL, as shown in Figure 9 below (but of course use the actual *Principal* URL value shown on your own *My Account - Integration* tab).

Syncing Contacts Using CRMSync and iOS (10.1) for iPhone & iPad

In iOS go to the general *Settings* screen (using the Home screen icon for *Settings*) and scroll down to select *Contacts* in the left column. Tap on *Accounts*, then on *Add Account*, and select *Other* for the kind of Account. Then choose *Add CardDAV Account* under Contacts (See Figure 10.)

Enter your *Server* name using the *Principal URL* as illustrated in Figure 9 below, but of course use the actual *Principal* URL value shown on your own *My Account - Integration* tab in the *CRMSync (CardDAV Server)* section. In our example above we enter:

`http://demo.1crmccloud.com/carddav.php/principals/admin.`

Then enter the *User Name* and *Password* you use to login to 1CRM. (If you have set the optional *DAV Password*, then use that password instead of your normal one.) Enter any *Description* you like or leave the default, then click on *Next*. Your account settings will be verified, and if they check out properly you are all done. Your 1CRM Contacts should now become visible within the Contacts app. You can edit them either in 1CRM, or in Contacts, and the changes will be reflected everywhere.

Note: This provides a great *offline* mode for all your 1CRM Contact data. On your iPhone or iPad you can add new contacts, or edit existing ones, even while offline. Once you are back online any changes will be sync'ed back up to your 1CRM server.

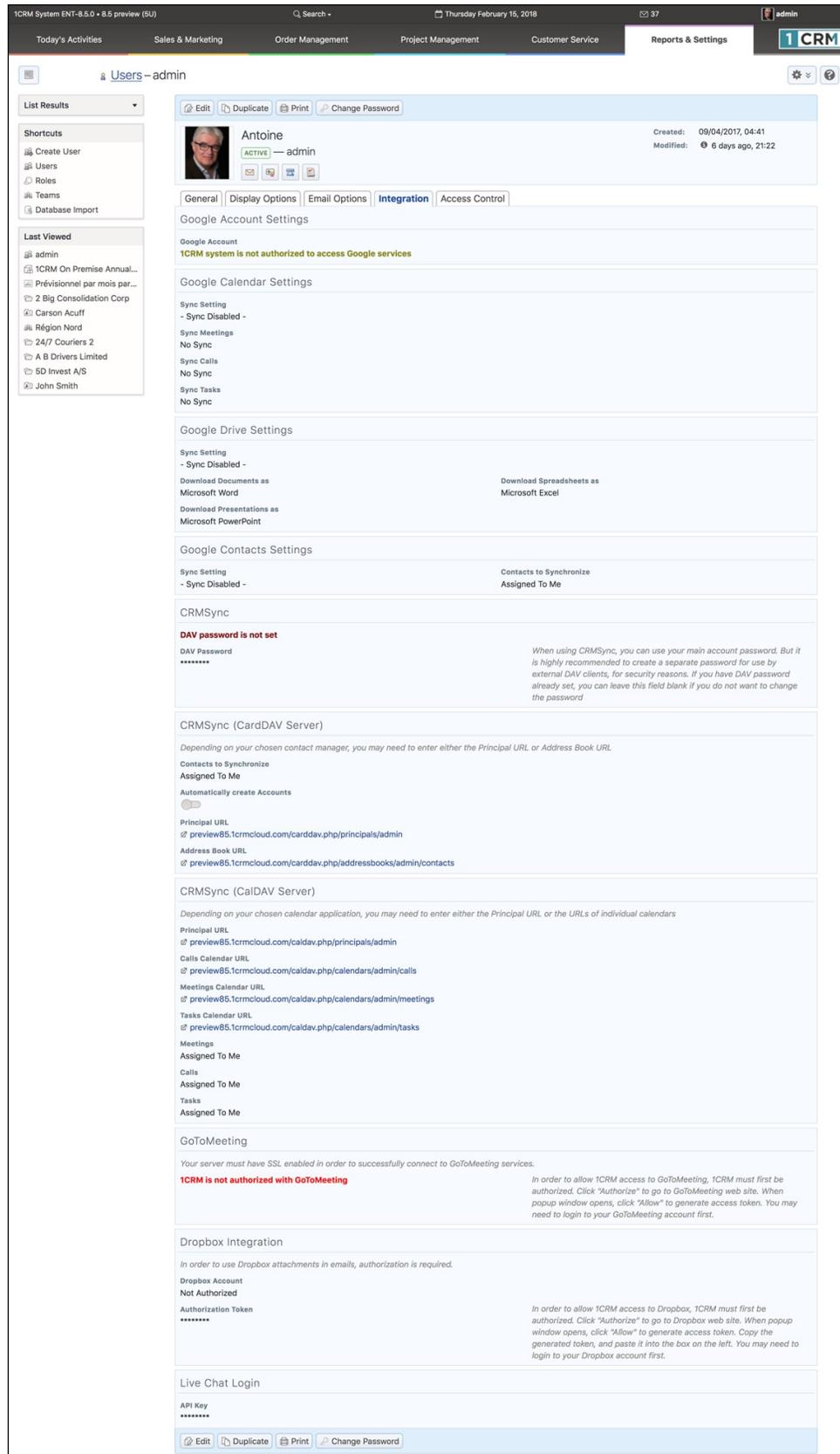


Figure 9: The 'My Account' Screen - Integration Tab

Syncing Contacts Using CRMSync and Android (Android 8 - Oreo)

In the Google Play Store you will find a few solutions known to work. You can search for *CardDAV*, and install the *CardDAV-Sync free* app by dmfs.org, which we document here. (Or the *DAVDroid* app is also an inexpensive solution known to work well.) When run it automatically displays the *Add Account* screen. Select *CardDAV* as the type of Account.

Enter your *Server* name using the *Principal URL*, as shown in Figure 10 below, but using the *Principal URL* shown on your own *My Account - Integration* tab in the *CRMSync (CardDAV Server)* section.

In our example here we use `http://demo.1crmloud.com/carddav.php/principals/admin`.

Then enter the *User Name* and *Password* you use to login to 1CRM (if you have set the optional *DAV Password*, then use that password instead of your normal login password), then click on *Next*. Your account settings will be verified, and if they check out properly you just need to add an account name, and to uncheck *Sync from server to phone only*. Then click on *Finish* and you are all done. (The app will ask you to carry on and tune up your sync settings, which you may well want to do.)

Your 1CRM Contacts should now become visible within the *Contacts* app. It may take a while for all of your contacts to sync if you have a lot of them. You can edit these contacts either in 1CRM, or in *People*, and the changes will be reflected everywhere.

Note: This provides a great *offline* mode for all your 1CRM Contact data. On your Android phone or tablet you can add new contacts, or edit existing ones, even while offline. Once you are back online any changes will be sync'ed back up to your 1CRM server.

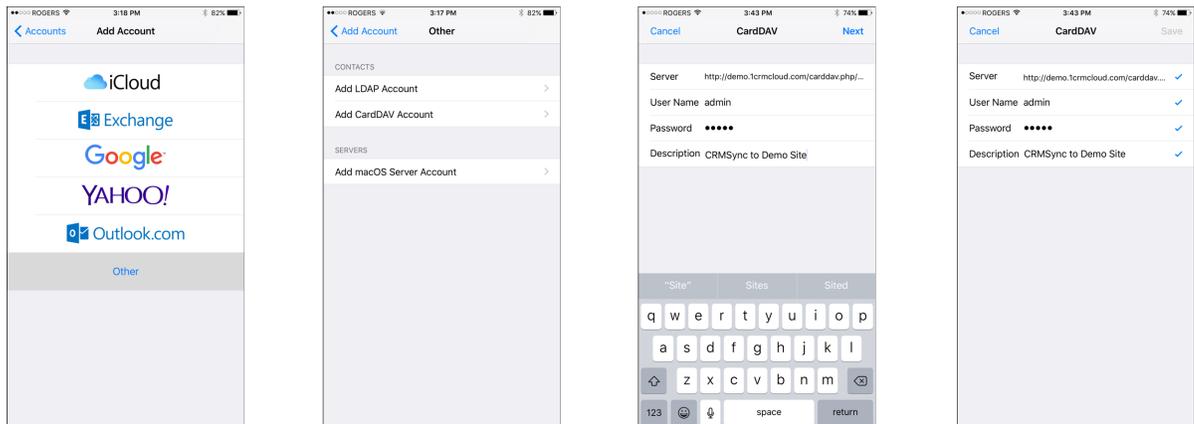


Figure 10: Using CRMSync for Contacts on an iPhone

3.2 CRMSync for Calls, Meetings, Tasks

The CRMSync feature in 1CRM also offers a CalDAV server to provide data sync capabilities for 1CRM Calls, Meetings and Tasks. To use the CRMSync feature for Calls and for Meetings, simply set the dropdown options on the *CRMSync (CardDAV Server)* panel (in the *Integration* tab of your *My Account* screen) to choose what Calls and Meetings to sync: *Assigned To Me*, *All I Am Invited To* or *All I Can See*. For Tasks your options are just *Assigned To Me* and *All I Can See*.

Then in any other system that supports CalDAV, such as iOS (for iPhone and iPad) or Android phones and tablets, simply subscribe to the CalDAV service by using the login credentials of your 1CRM server (if you have set the optional *DAV Password*, then use that password instead of your normal login password) plus one or more of the CalDAV URLs as shown in Figure 9, but using the actual URLs shown on your own *My Account - Integration* tab.

Syncing Calendars Using CRMSync and iOS (10.1) for iPhone & iPad

In iOS go to the general *Settings* screen (using the Home screen icon for *Settings*) and scroll down to select *Calendar* in the left column. Tap on *Accounts*, then on *Add Account*, and select *Other* for the kind of Account. Then choose *Add CalDAV Account* under Calendars.

Enter your *Server* name using the *Principal URL* as illustrated in Figure 9 above, but of course use the actual *Principal URL* value shown on your own *My Account - Integration* tab in the *CRMSync (CalDAV Server)* section. In our example we enter:

`http://demo.1crmcloud.com/caldav.php/principals/admin.`

Then enter the *User Name* and *Password* you use to login to 1CRM. (If you have set the optional *DAV Password*, then use that password instead of your normal one.) Enter any *Description* you like or leave the default, then click on *Next*. Your account settings will be verified, and if they check out properly you are all done. Your 1CRM Calendar entries should now become visible within the *Calendar* app. You can edit them either in 1CRM, or in the *Calendar* app, and the changes will be reflected everywhere.

Note: The iOS *Reminders* app will also show your 1CRM tasks, and can also sync bidirectionally.

Note: This provides a great *offline* mode for all your 1CRM Calendar data. On your iPhone or iPad you can add new appointments or tasks, or edit existing ones, even while offline. Once you are back online any changes will be sync'ed back up to your 1CRM server.

Syncing Calendars Using CRMSync and Android (Android 8 - Oreo)

In the Google Play Store search for *CalDAV*, and install the *CalDAV-Sync* app by dmfs.org, which we document here. When run it automatically displays the *Add Account* screen. Select *CalDAV* as the type of Account.

Enter your *Server* name using the *Principal URL*, as shown in Figure 9 above below, but using the *Principal URL* shown on your own *My Account - Integration* tab in the *CRMSync (CalDAV Server)* section.

In our example here we use `http://demo.1crmcloud.com/caldav.php/principals/admin.`

Then enter the *User Name* and *Password* you use to login to 1CRM (if you have set the optional *DAV Password*, then use that password instead of your normal one), then click on *Next*. Your account settings will be verified, and if they check out properly you then see a screen where you must select checkboxes to indicate that both Calls and Meetings should be synced. Click *Next* again, then you just need to add an account name, and to uncheck *Sync from server to phone only*. Then click on *Finish* and you are nearly done. On the *Congratulations* screen you are on now, click on *Install Task*

App Now. This will install OpenTasks, by dmfs.org. Your 1CRM Calendar entries should now become visible within the *Calendar* app, and your Tasks within the Tasks app. You can edit them either in 1CRM, or in the *Calendar/Tasks* apps, and the changes will be reflected everywhere.

Note: This provides a great *offline* mode for all your 1CRM Calendar data. On your Android phone or tablet you can add new appointments or tasks, or edit existing ones, even while offline. Once you are back online any changes will be sync'ed back up to your 1CRM server.

4.0 1CRM Client App for Apple iOS, iPadOS & macOS

In the Apple App Stores for iOS, iPadOS and macOS search for *1CRM Client* and install our App. Once installed you will have an app icon like this available to you:



Figure 11: 1CRM Client for Apple - App Icon

The 1CRM Client App for Apple allows you to use ALL the 1CRM modules, plus administration (if you are allowed to).

Some special features of the 1CRM Client App for Apple include:

- Pull down to refresh
- Notifications integration
- Login credentials memory
- Click to call in the CRM can place a call using the iPhone, when running the 1CRM Client app on your iPhone
- Email Compose on iPad, iPhone and Mac can compose the Email using either the 1CRM email client, or the default mail app on your device.
- Scan business cards to create new Leads or Contacts.

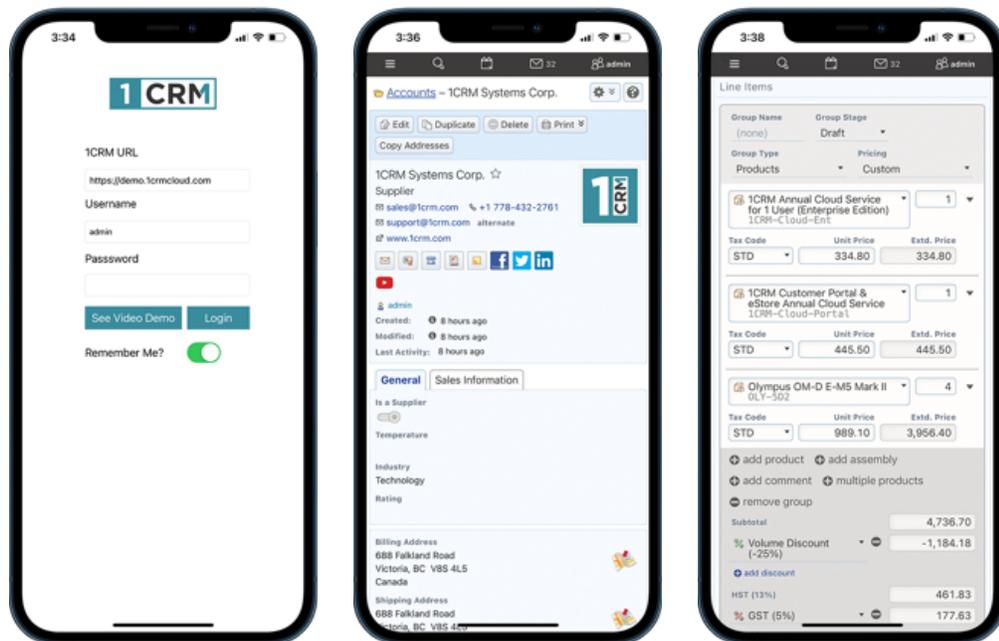


Figure 12: 1CRM Client on iPhone 12 Pro Max - Login & Sample Screens

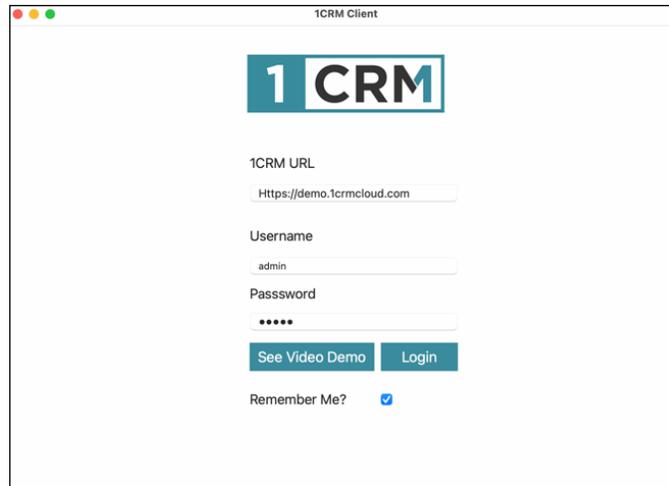


Figure 13: 1CRM Client for Apple - macOS Login Screen

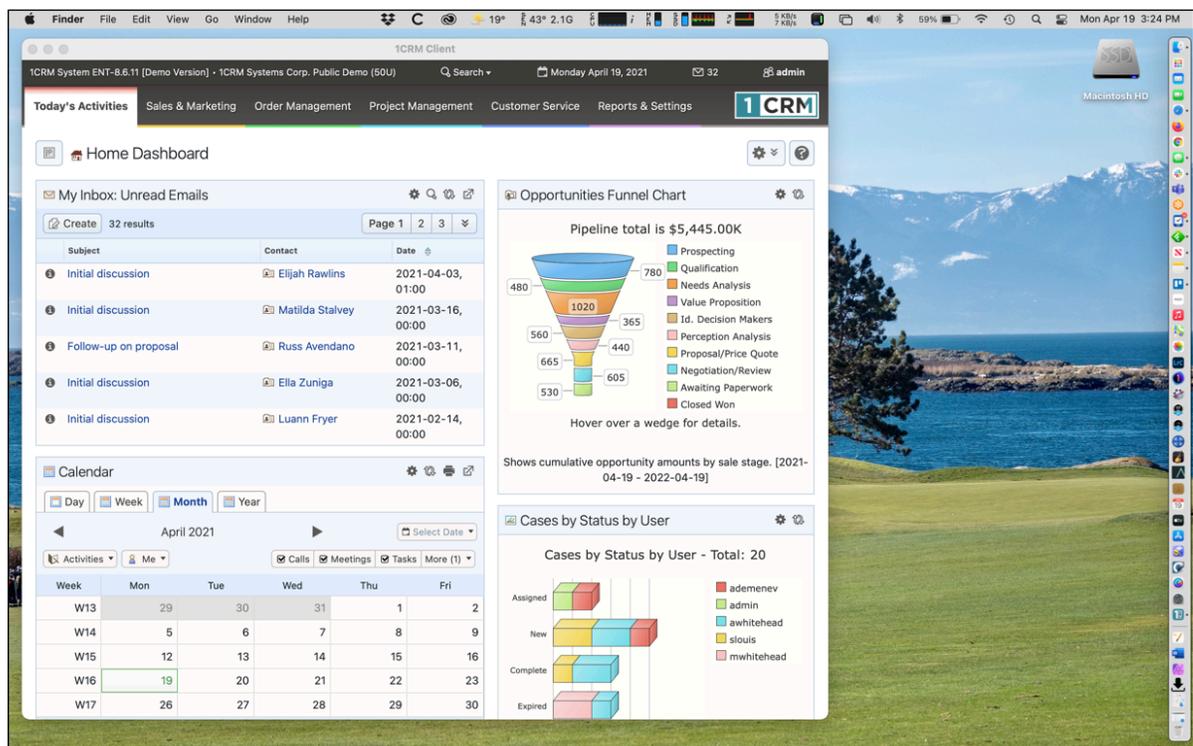


Figure 14: 1CRM Client App on Mac

You navigate the 1CRM Client App for Apple in very much the same way you would using a browser. The Claro theme is used, regardless of the theme you have selected. Your selected theme will be used only within your browser, not when using the App. The complete 1CRM system is available to you: all modules plus administration. Even modules that you might expect to require larger screens, such as Quotes and Invoices, will adapt themselves for elegant operation when you have a smaller screen or application window. On the Mac you can re-size the App window as you prefer, and the 1CRM Client App will adapt to the window size.

The following points apply when using the App on an iPhone, on a split screen on the iPad, or in a small window on a Mac (so basically - when you are running 1CRM in quite a confined space!):

- The menu system is now condensed, and accessed via a *hamburger* style icon  on the left end of the top bar (see Figure 7 above)
- The sidebar that contains shortcuts and last viewed items is not shown.
- Shortcuts are available when you tap the menu icon . (See Figure 7)
- Last viewed items are available when you tap on Search. (See Figure 8)
- Dashboards all adopt a single column layout.
- When you click on phone numbers within 1CRM, you can choose if dialling will use your actual iPhone service, or an app corresponding to your system's chosen IP Telephony service (Skype or RingCentral).

4.1 Notifications Integration

iOS devices have a rich notification service. When you first run the 1CRM Client app it will ask for permission to use these notifications, like any other app that uses iOS/iPadOS/macOS notifications. You can set what sort of notifications you want 1CRM to generate using your system preferences.

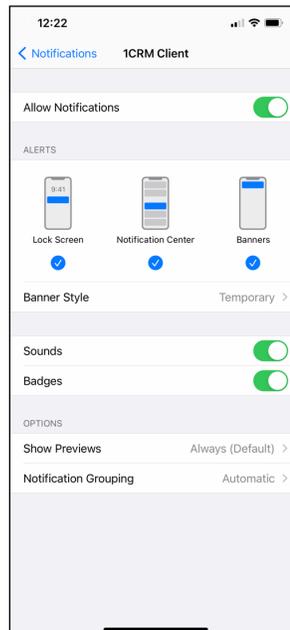


Figure 15: Setting Notification Styles for 1CRM Client (iOS Example)

1CRM Client notifications require the scheduler on your 1CRM web server to be running. Your 1CRM web server uses the Apple Push Notification service (APNs) to have Apple tell your Apple device there are notifications available. Your device fetches the notification details from your 1CRM server, and then shows you them at the appropriate times.

These notifications are only sent for 1CRM Meetings, Calls and Tasks, when a *Display Reminder* time has been set. And notifications are only shown when the 1CRM Client app is running in the background.

Note: In your 1CRM system, within *Administration - System Settings* there is a panel that controls Push Notifications for iOS/iPadOS/macOS and Android.

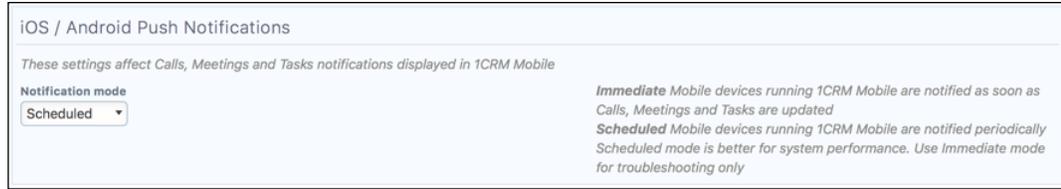


Figure 16: 1CRM Notifications Integration

Your admin should make sure this is set for *Scheduled*.

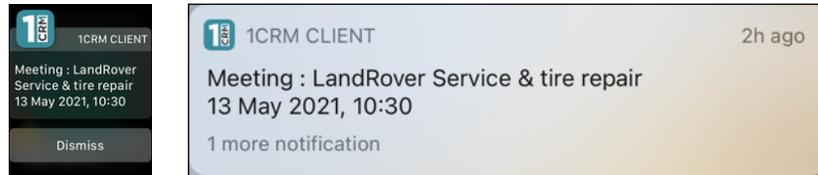


Figure 17: Sample Notifications on Apple Watch and iPhone

4.2 Pull Down to Refresh

At any time when using 1CRM Client for Apple, you may refresh the current screen by simply pulling downward. The progress indicator line at the top will show the progress of the refresh, as will a small circular popup indicator. On the Mac use Command-R (⌘+R) to refresh, or click in an open area on the top bar above the menu bar (also scrolls to the top of the current view).

1CRM Client for Apple also supports the use of Command-Cursor Left (⌘+⬅) to perform a browser back (previous screen) function.

4.3 Login Credentials Memory

1CRM Client for Apple has a really useful feature that allows it to remember your login credentials, so you can login with a single click every time you bring up this app.

Note: You should protect access to your Apple device if you use this capability!

If for some reason you want to login to another 1CRM system, or to your current system but as another user, simply *Logout* while in 1CRM Client for Apple, and you will see the original Login screen again. And then enter new values for URL, username and password.

4.4 Scan Business Cards

The 1CRM Client app for Apple has a really useful optional feature that allows you to create new Leads or Contacts by scanning business cards using the camera on your iPhone or iPad. While in the app, simply choose to create a new Lead or Contact, and on the screen to enter that information you will see a new button *Scan Business Card*.

Note: You will only see this button if your 1CRM Administrator has entered a CamCard API key on the System Settings screen within Administration on your 1CRM system. (1CRM 8.6.14 or later)

5.0 1CRM Mobile Android App

In the Google Play Store search for *1CRM* and install our App. Once installed you will have an app icon like this available to you:



Figure 18: 1CRM Mobile for Android - App Icon

Note: In order to use 1CRM Mobile for Android, your 1CRM system must be on release 8.5.2 or later.

1CRM Mobile for Android is similar to the Client App for Apple devices. This app allows you to use ALL the 1CRM modules including administration. (Of course on the iPhone, and on Android, you always have the option of just pointing the smartphone's browser at the normal URL for your 1CRM system, and logging in that way - to use the full system.)

Some special features of 1CRM Mobile for Android include:

- Pull down to refresh
- Notifications integration
- Login credentials memory, with auto-login

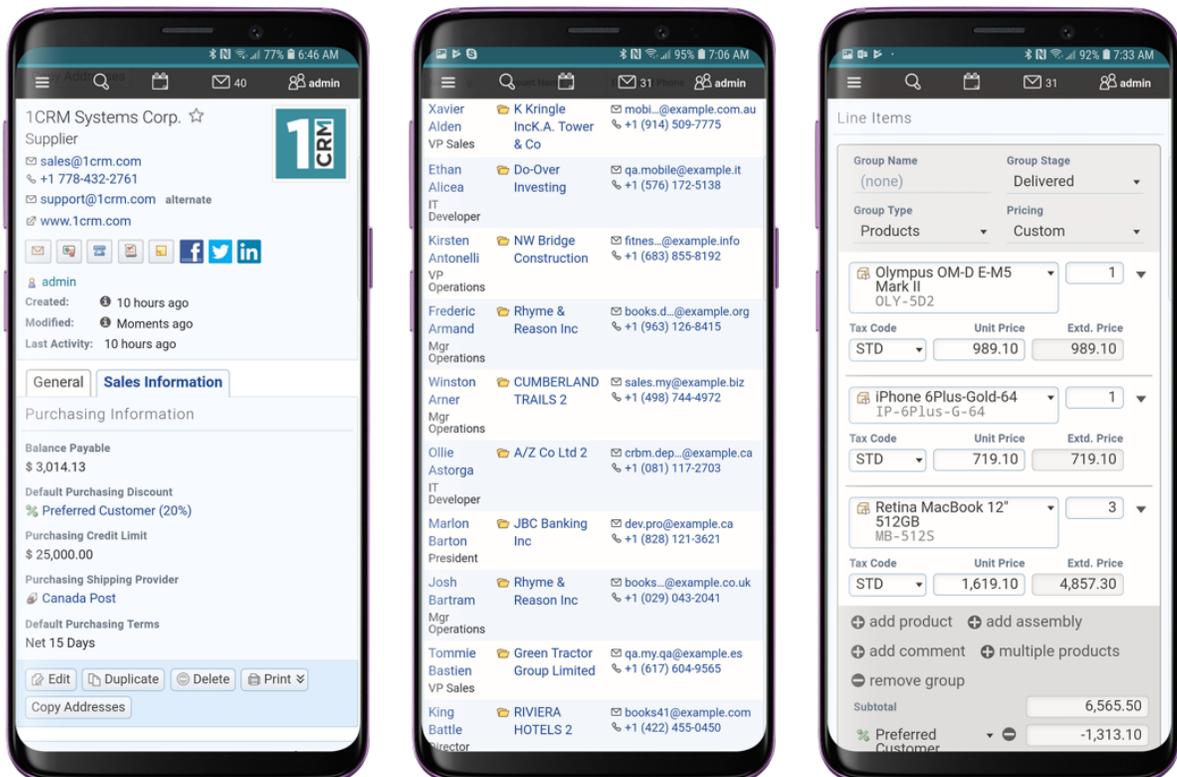


Figure 19: 1CRM Mobile for Android - Sample Screens

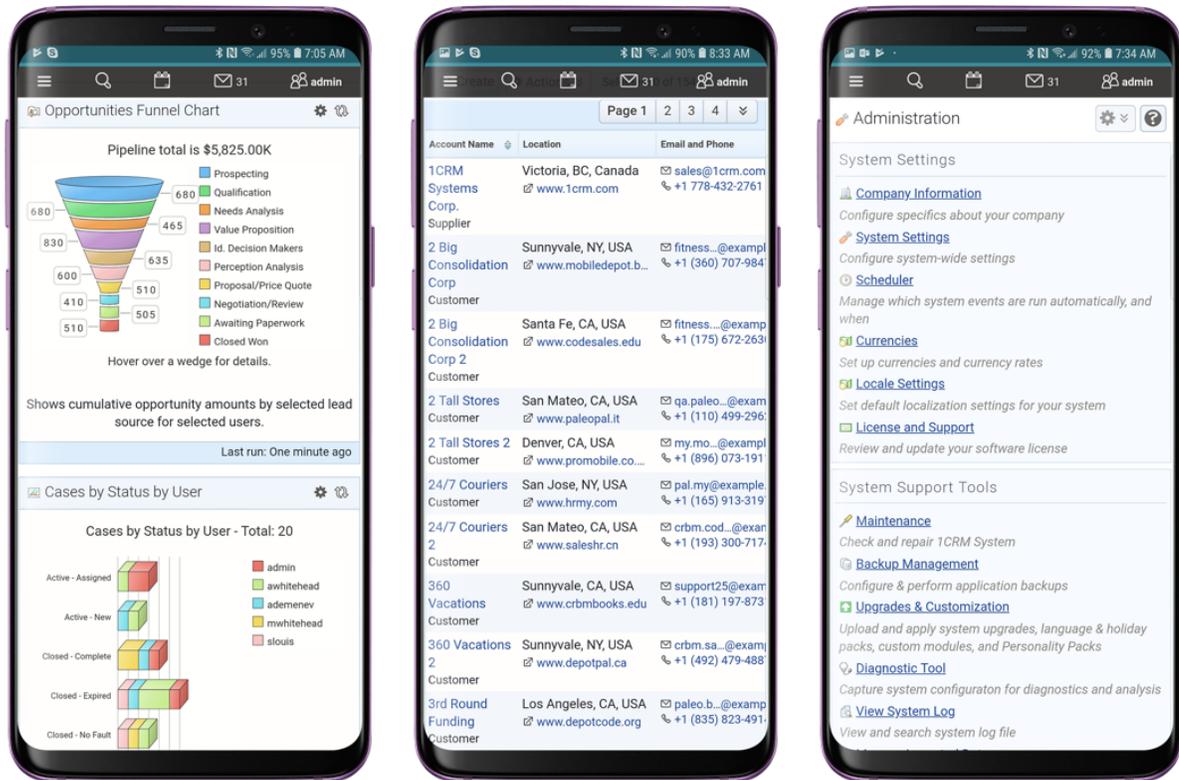


Figure 20: 1CRM Mobile for Android - Sample Screens

You navigate the Android App in very much the same way you would using CRMFlex. All these same points apply:

- Claro theme is used, regardless of the theme you have selected. Your selected theme will be used on other devices.
- The complete 1CRM system is available to you: all modules plus administration. Even modules that you might expect to require larger screens, such as Quotes and Invoices, have been adapted for elegant smartphone operation.
- The menu system is now condensed, and accessed via a *hamburger* style icon  on the left end of the top bar.
- The sidebar that contains shortcuts and last viewed items is not shown.
- Shortcuts are available when you tap the menu icon . (See Figure 7)
- Last viewed items are available when you tap on Search. (See Figure 8)
- Dashboards all adopt a single column layout.
- When you click on phone numbers within 1CRM, you can choose if dialling will use the phone in your smartphone, or an app corresponding to your system's chosen IP Telephony service (Skype or RingCentral).

5.1 Notifications Integration

In *Administration - System Settings* there is a panel that controls Push Notifications for iOS and Android.

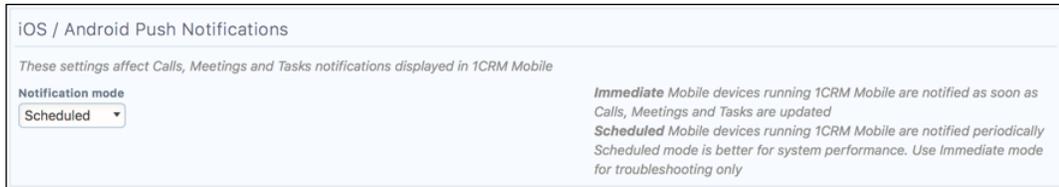


Figure 21: 1CRM Mobile for Android - Sample Screens

Typically this should be set for *Scheduled*. This capability of 1CRM will use the Android Firebase Push Notifications system to cause your 1CRM notifications to be displayed on the screen of your Android smartphone, using the phone's normal notification service.

5.2 Pull Down to Refresh

At any time when using 1CRM Mobile for Android, you may refresh the current screen by simply pulling downward. The progress indicator line at the top will show the progress of the refresh, as will a small circular popup indicator.

5.3 Login Credentials Memory

1CRM Mobile for Android has a really useful feature that allows it to remember your login credentials, and automatically login to 1CRM every time you bring up this app.

Note: You should protect access to your smartphone if you use this capability!

If for some reason you want to login to another 1CRM system, or to your current system but as another user, simply *Logout* while in 1CRM Mobile for Android, and you will see the original Login screen again.

1CRM MOBILE USER GUIDE

Your Complete Guide to Using 1CRM on Mobile Devices

