Sage CRM 7.2 Release Preview
Sales Tracker for Windows 8

Download the Sales Tracker app

To download the app:

1. Go to the Windows 8 App Store from your Windows 8 device.
2. Search for Sage CRM.
3. Select **Sage CRM Sales Tracker**.
4. Select **Install**.

Sign in to Sales Tracker

To sign in to Sales Tracker:

1. Select the **Sage CRM Sales Tracker** tile from the Start screen.
2. Read and accept the terms & conditions, and enter your user name and password in the Sign In screen.

View recent Sage CRM sales from Sales Tracker

To view Sage CRM data from Sales Tracker:

1. The **Opportunities** screen shows a doughnut-style graphic of your recent sales opportunities by stage.
2. Swipe right to left and you'll see recently added companies, and then people.
3. Select a record to drill down and get more detail.
4. Select the Favourites icon to add the record to your Favourites list.

Searching using the Windows 8 Charms bar

To search for a company in Sales Tracker:

1. Swipe right to left within Sales Tracker to activate the Windows 8 **Charms bar**.
2. Type the company name into the Search box and select the magnifying glass icon.
3. Matches for the company name are displayed. Select the company to drill-down into the company record.

Changing Sales Tracker data refresh options

To change, for example, the data refresh option on startup:

4. Swipe right to left within Sales Tracker to activate the Windows 8 **Charms bar**.
5. Select **Settings | Options**.
6. Set the **Refresh On Startup** slider to On/Off.

Sage CRM 7.2 Release Preview
Sales Lite for iPhone

Download the Sales Lite for iPhone app

To download the app:

1. Make sure that:
   - You have an iPhone model which is 3GS or later
   - iOS 5 or later on your iPhone
   - You are enabled for web service access in Sage CRM. Your System Administrator can check this in **Administration | Users | Users | Allow Web Services Access.**
2. Go to the App Store from your iPhone.
3. Search for Sage CRM.
4. Select **Sage CRM Sales Lite for iPhone**.
5. Select **Free | Install App**.

Log on to Sales Lite

To log on for the first time:

1. Select the **Sales Lite** icon from your home screen.
2. The first time you log on, you will be prompted to enter the URL of your CRM install. If you are not sure what it is, you can get it from your System Administrator.
3. A successful logon displays the app home page, and an initial download of data is started.

Get Data into Sales Lite

You can view and work with all people and opportunities which you normally have access to from your desktop, and your appointments and tasks for the next 14 days.

1. From the app home page, select **Update Data from Sage CRM.**
2. Your iPhone contacts are also displayed in the **Sales Lite | Contacts** area.
3. To add an iPhone contact into Sage CRM, select **Add to CRM** from the contact screen.
4. The iPhone contact gets added into Sage CRM as a **Lead** record.

Work offline with Sales Lite

You can see your contacts, opportunities and calendar offline. You can also send communications or write notes which will be synchronized to Sage CRM later. To work offline:

1. Make sure you already have data to work with in Sales Lite.
2. On the logon screen, select **Work Offline**.
3. When you are back online, you can synchronize your data from the Home screen

Send an e-mail to a contact in Sales Lite

To send an e-mail to a person in the Sales Lite app:

1. Select **Contacts** from the app home page.
2. Search for the person by typing in part of their first or last name.
3. Select the person, and tap their e-mail address.
4. Type the e-mail and send. The e-mail is recorded in Sage CRM as a completed communication.

Add a note and Picture to a sales opportunity in Sales Lite

To add a note and a picture to a sales opportunity:

1. Select **Opportunities** from the app home page.
2. Search for the opportunity by typing in part of the description, or the name of the company or person it is associated with.
3. Select the opportunity, and tap **Add Note**.
4. Add a picture by tapping the photo icon. If you are offline, the note and picture will get added to Sage CRM next time your data is refreshed. Pictures saved as documents in Sage CRM and can only be viewed with the opportunity when working with Sage CRM from the full desktop version

Sage CRM 7.2 Release Preview
Sage CRM for Tablet with iOS support

Set tablet access preference

To set a default access preference for with Sage CRM from a tablet device:

1. Make sure you are logged on to the Desktop version.
2. Select **My CRM | Preferences**.
3. Set the **Default Tablet Version** field to either Desktop Version or Tablet Version.

Log on to Sage CRM from a tablet

You can reach the Logon page in this way:

1. Open the internet browser on your tablet device.
2. In the address box, enter the same address you use to access Sage CRM from your desktop or laptop.
3. Enter your logon details and select Log On. The home page for the tablet theme or your desktop version is displayed.

Add customer data to Sage CRM from a tablet

To add information:

1. Tap the **New** button on the Main Menu.
2. Tap the record type you want to create. For example, Company.
3. Enter the details in the input form. Different field types open different types of interface. For example, a text box opens the keyboard. Any required fields are marked with an asterisk after the field name.
4. Tap the Save button at the top of the page. If there are any validation errors, you will receive a pop-up message and required fields are highlighted in yellow.