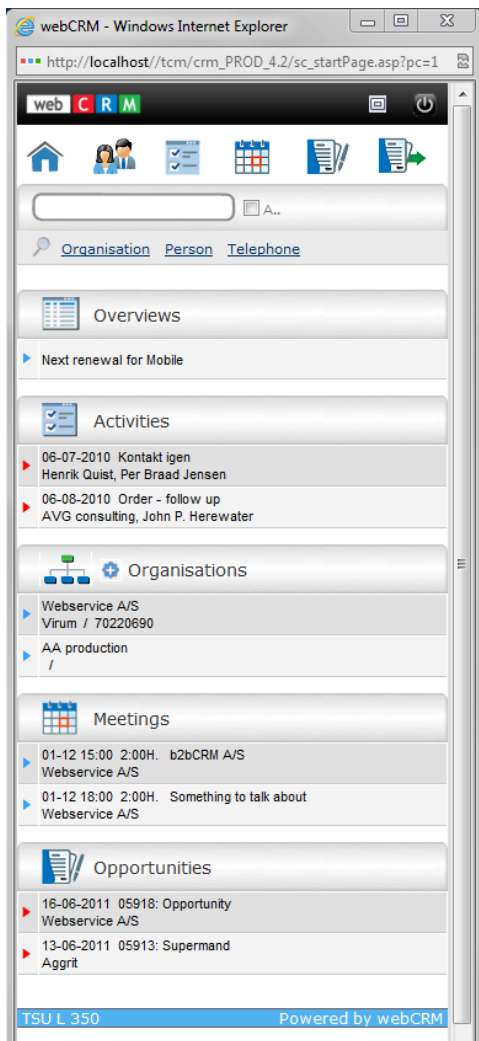
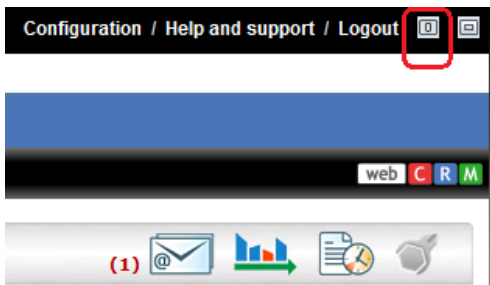


## Compact / Mobile version

webCRM is available in a compact screen version suitable for mobile phones or for use in a PC or MAC browser when only the basic functions are required

**Note:** The Compact / Mobile version requires an Internet browser and on-line Internet

To open the compact version in a PC / MAC browser click the indicated icon in the webCRM system



You can switch to and from the compact version by clicking the icon in the upper right hand corner.

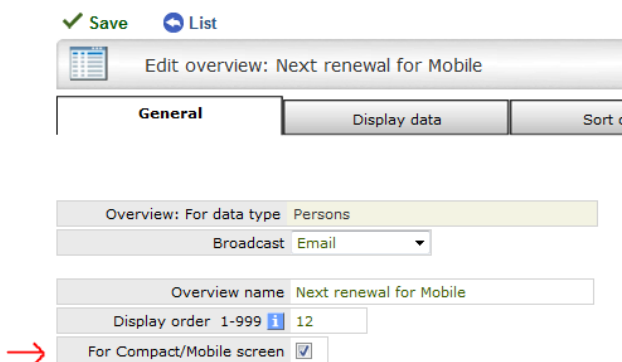
The compact / mobile edition supports all the basic functions of the Main menu.

Clicking the "Home" icon leads to the start page.

## Overviews / Reports for the Compact / Mobile version

Log in from a PC/Mac to your webCRM system ( access level = Administrator or higher )

To enable overviews/reports for the Compact / Mobile version edit the Overview/Report settings and mark the indicated checkbox.



It is recommended to enable only overviews with a few columns displayed. Also note that download to Excel and Email broadcast are not enabled when an overview/report is displayed in the compact/mobile version.

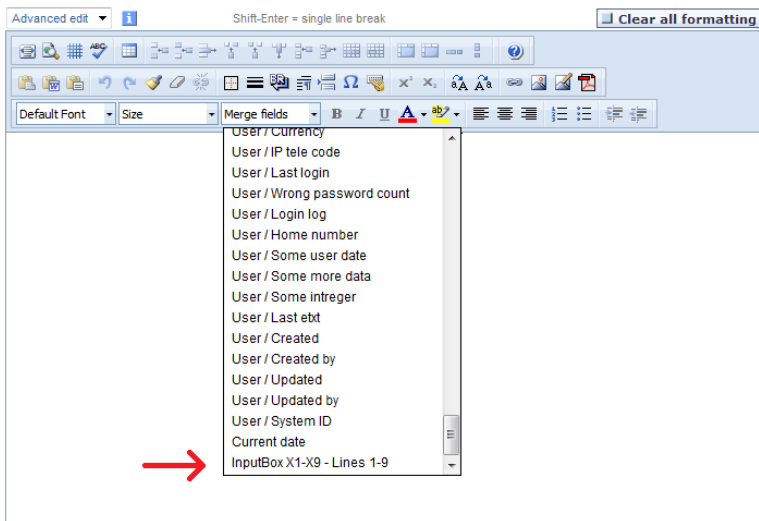
## Emails for the Compact / Mobile version

When using webCRM with smart phones, iPhone and iPads the normal email/pdf editor is not supported, instead you can use InputBoxes.

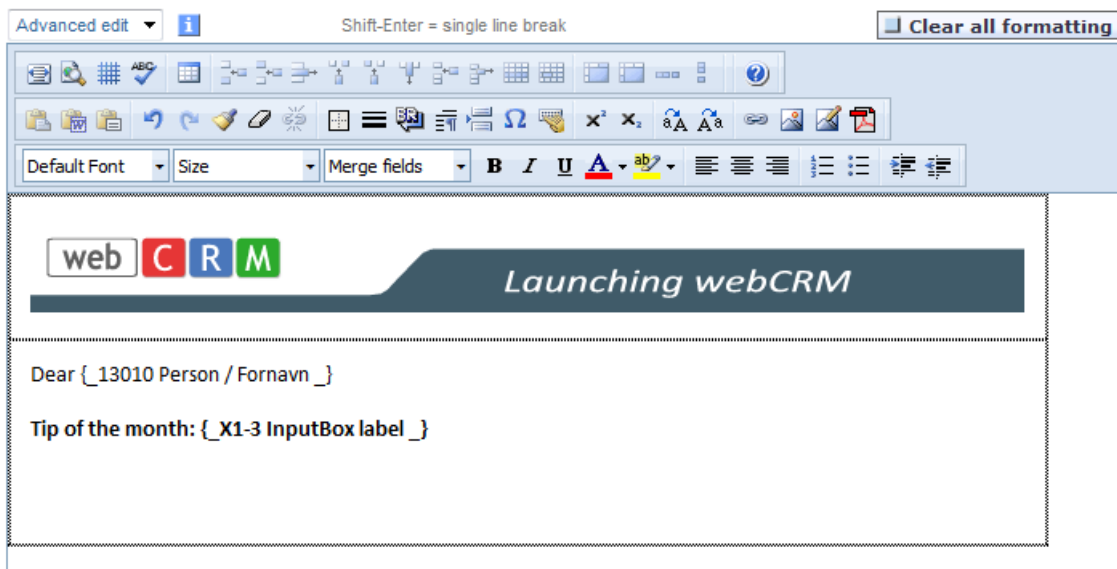
**Note: When sending emails from the Compact / mobile version all text will be displayed as plain text. However, when using a template the email will be fully formatted including images when sent.**

When creating and editing email templates and PDF templates it is possible to select a merge field named "InputBox". This type of merge field is used when you want the user to input text for a template in text boxes rather than directly in the email text.

**Log in from a PC/Mac to your webCRM system ( access level = Administrator or higher )**



The InputBox merge field will look like this in the editor:



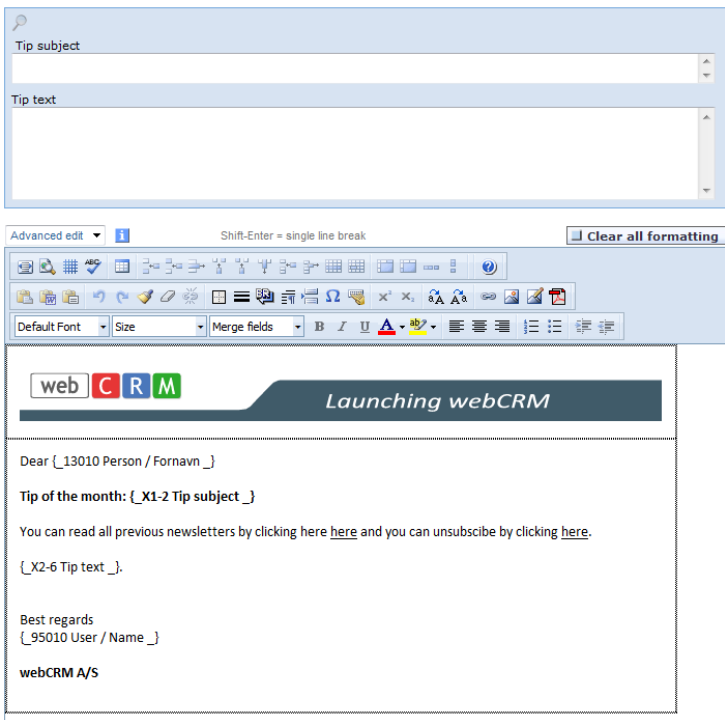
**Edit the InputBox merge field: {\_X1-3 InputBox label \_}**

- {\_X**1**-3 InputBox label \_} This number must be in the range 1 to 9 and is the InputBox number in the template. Each email or PDF template supports up to 9 different InputBox merge fields.
- {\_X1-**3** InputBox label \_} This number must be in the range 1 to 9 and is the number of input lines presented to the user when the user inputs text.
- {\_X1-3 **InputBox label** \_} This text is the label for the InputBox presented to the user.

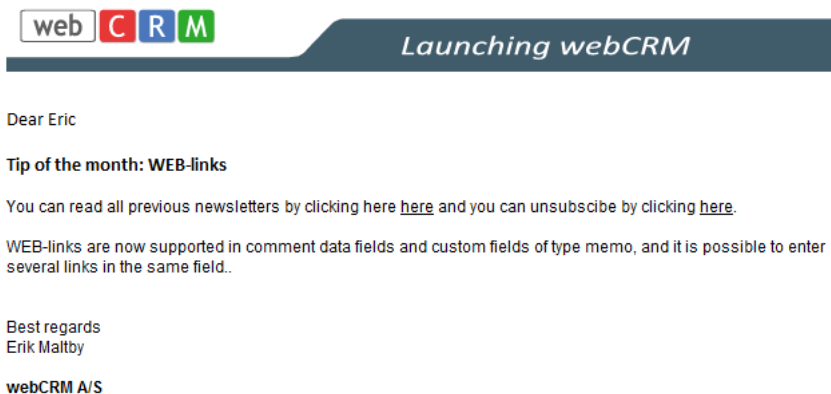
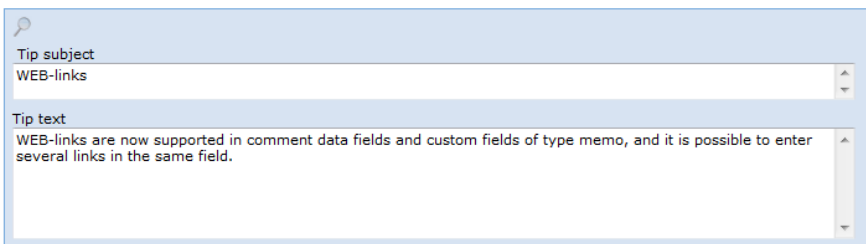
### Example for en Email template with 2 inputBoxes:

When sending an email and when the template is selected, the InputBoxes will be displayed above the template and the user can input text into these before sending the email. The text input will be merged with the template before sending.

When designing the template you can enter text into the boxes and click the magnifying icon to preview an example.



### User input example:



### The resulting email

**Note:** When sending emails from the Compact / mobile version all text will be displayed as plain text. However, when using a template the email will be fully formatted including images when sent.

## Log-in at webCRM from an iPhone or smartPhone - For system administrators:

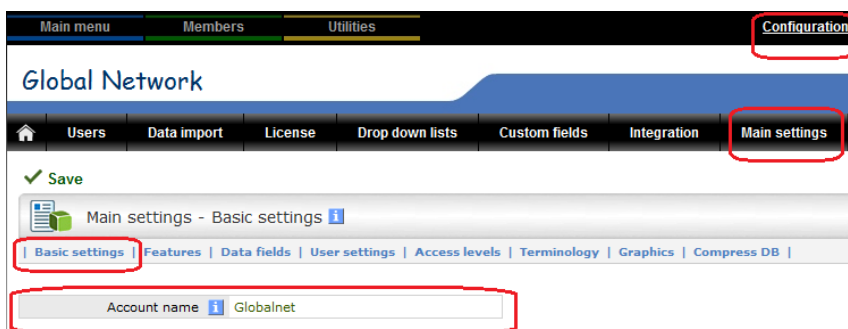
To log-in from an iPhone or SmartPhone you need this information at hand:

- Account name
- User name
- Password

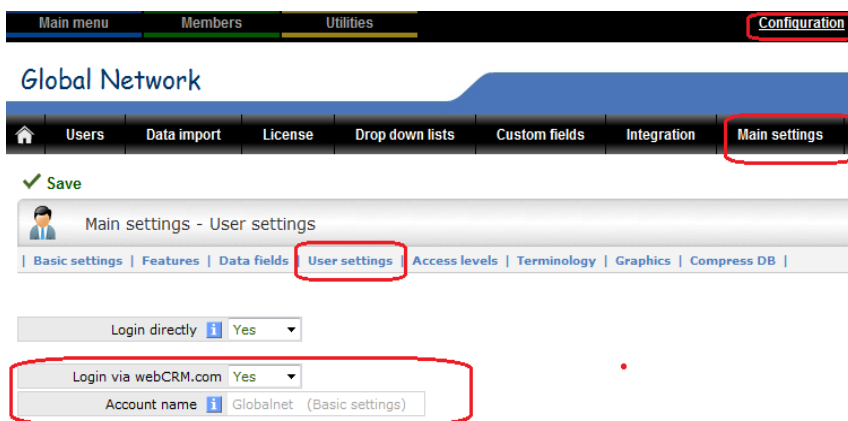
## Log in from a PC/Mac to your webCRM system ( access level = Administrator or higher )

Your account name for webCRM is found in basic settings. Here you can also change the account name.

The account name is the same for all users of your webCRM system



Make sure that "Login via webCRM.com is enabled.

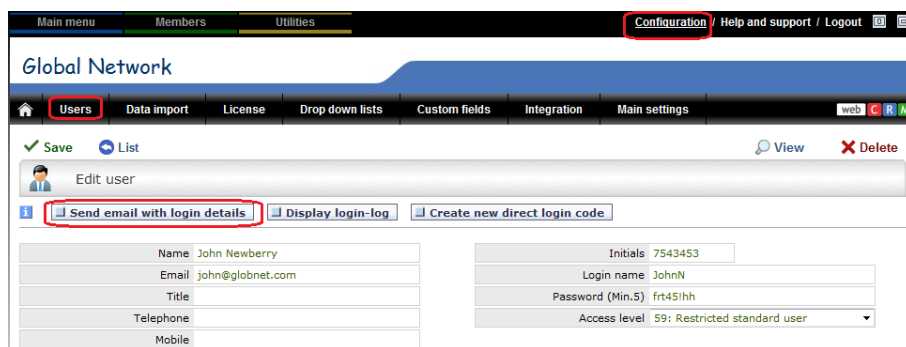


You can send email to users by clicking the users one-by-one in the users list and then click the button:

"Send email with login details"

The user will receive by email:

- Account name
- User name
- Password



## Log-in at webCRM from an iPhone or smartPhone - For all users:

To log-in from an iPhone or SmartPhone you need this information at hand:

- Account name
- User name
- Password

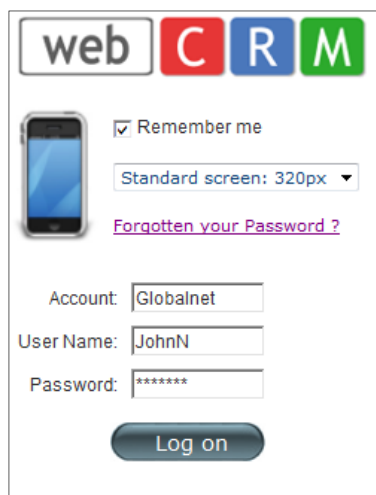
You will normally receive this information by email. If you haven't received this information – request it from your system administrator.

**Note:** Your mobile phone must be online with an Internet connection in order to log-in to webCRM.

### 1. Standard login method for all mobile Phones

- Applies to all mobile phones with an Internet browser

- 1: Open the Internet browser at you mobile phone
- 2: Enter this address: [www.webcrm.com/mobile](http://www.webcrm.com/mobile)
- 3: You will see this screen --->
- 4: Bookmark the webpage
- 5: Enter the credentials
- 6: Check "Remember me" – and click "Log on"



**To login again at a later time, simply open the bookmarked page, enter password and click "Log on"**

### 2. Direct login method for all mobile Phones

- Applies to all mobile phones with an Internet browser

If you can login directly to webCRM without entering a password you can copy the link for the login (a link with a long encrypted keys of letters) to your mobile phone (by email may be the easiest way)

- 1: Open the Internet browser at you mobile phone
- 2: Enter this address: [www.webcrm.com/direct](http://www.webcrm.com/direct)
- 3: Bookmark the page
- 4: Edit the bookmark and copy the direct log-in link to the Location (URL) for the bookmark and Add: &sc=1 to the URL ( or &sc=nnn where nnn = the screen width value 320 to 1024 )

**To login again at a later time, simply open the bookmarked page**

URL example:

<https://b2bsys.net/tcm/start2.asp?dba=HJKIJJHTGFREDSDEDFGRFTGHYHUUUHGFRDEWSSDDMNBKLOY&sc=1>

### 3. App Login method ( includes direct login without entering password)

- Applies to iPhones and smartPhones with Android operation systems

Go to [www.webcrm.com](http://www.webcrm.com) and follow the links for "Mobile App". Here you can find instructions on how to download an App for your iPhone or SmartPhone (Android type)



The App will give you an App icon on your Phone and make login to webCRM easier. You still need an online Internet connection in order to log-in to webCRM

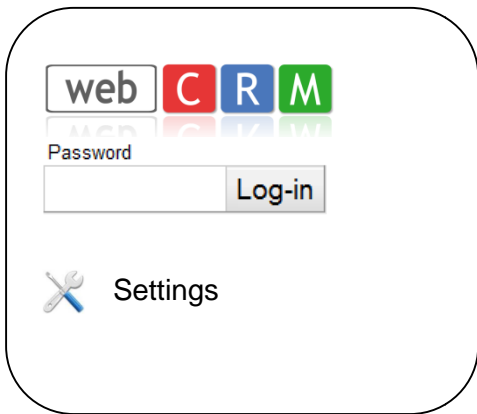
See next page for a detailed description

## App for webCRM



The webCRM app for iPhone + Android makes it easy to open the phone's browser with the required URL to launch webCRM in the compact / mobile version. It is also possible to order a free trial in the case the app is downloaded for a user without a webCRM account.

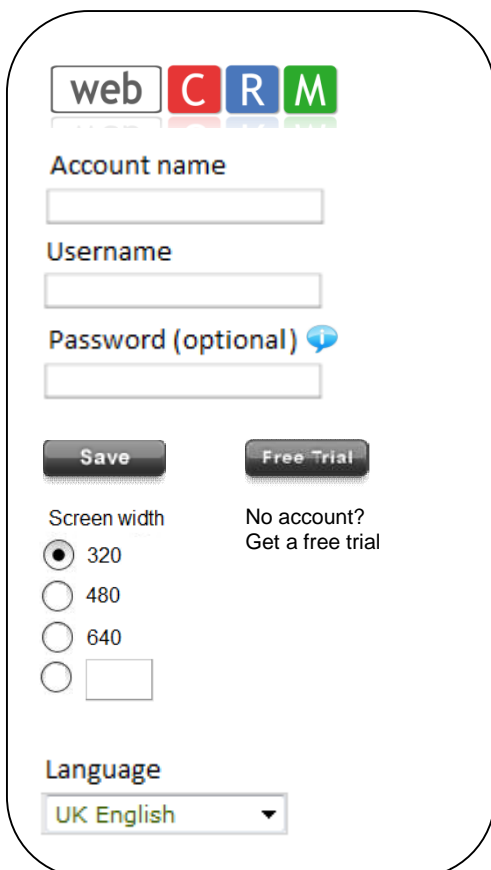
Opening screen when password not saved:



Opening screen when password is saved:



Settings screen:



When no password is saved you will be prompted to enter your password when you log-in to webCRM.

To keep your webCRM data safe in the case you should lose your phone we recommend that you do not save your password.