



iPad CRM Manual



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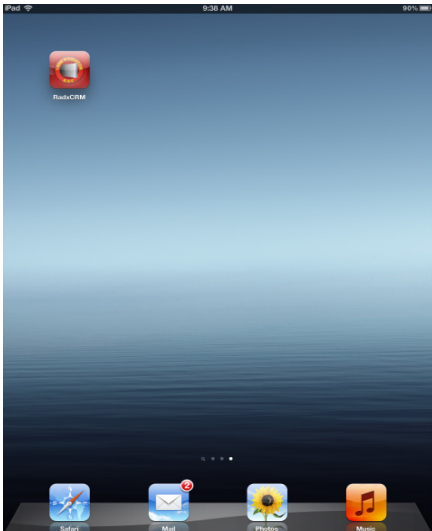
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iPad CRM

Getting Started



Step 1: Tap the RadxCRM Icon

Step 2: You will be asked to provide a User ID and password.

Use the same UserID and password that you use to login to your computer each morning.

Step 3: You need to Sync the App with your warehouse.

Select your warehouse and tap "Done". Then tap the "Sync" button.

The application will begin to sync. *This will take a few minutes.*


Syncing ensures that you have the most updated data possible.

You should re-sync every morning before you go into the field!

iPad CRM Map Screen

When you are done with the sync, you should get a screen that looks like this.

The screenshot shows the iPad CRM Map Screen. The top bar is red with the text "Mapped Customer List" on the left, "RadCRM - Map" in the center, and "Menu" on the right. The map displays a geographical area with various colored pins (red, blue, green, yellow, black) representing customer locations. A blue pin indicates the current location. A red box highlights the "Menu" button, which contains two icons: a target symbol and a refresh symbol. A red arrow points from this box to a larger callout box containing these two icons. A green arrow points from a callout box to the refresh icon on the map. A blue arrow points from a callout box to the blue pin on the map. A yellow arrow points from a callout box to a black pin on the map. A red arrow points from the target icon callout box to a callout box. A red arrow points from the refresh icon callout box to a callout box. A white box with a black border contains the text "Page 2".

There are customers found in the area using the "Target Customers"  button.

This is your current location.

If a customer has a black dot, it means that they have had a visit entered in the last 30 days.

Toggle Campaign Filter
This button toggle the PIDS shown on the map between a selected campaign (*see Searching for Existing Campaigns section*) or PIDS in selected area (*see Target Customers button to the right*)
(Limit 300 customers)

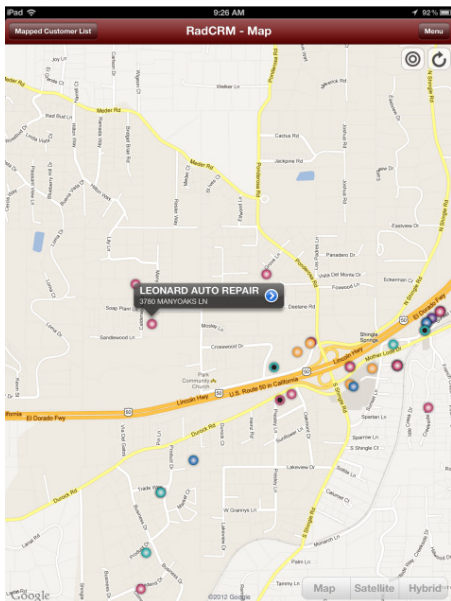
Target Customers
This button will find all customers in an area of the map that you are currently zoomed in on.
(Limit 300 customers)


Page 2

iPad CRM

Customer Detail

Tap a customer on the map to see the name of the shop.



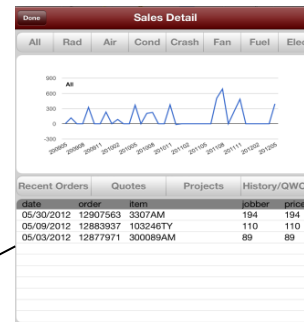
Tap  to the right of the shop name to open the customer detail window.

A screenshot of the customer detail window for 'LEONARD AUTO REPAIR'. The window displays various fields and sections:

- Contact Info:** phone (530/677-3019), address (3780 MANYOAKS LN, SHINGLE SPRINGS CA 95682), and a 'route' button.
- Notes:** A section for entering notes.
- Status and Pricing:** status (X - X Commu...), price code (MP), discount (0 %), type group (Repair), and type (R - Repair Shop).
- Sales History:** A table showing sales for different categories:

sales 30	0
sales 360	0
air sales 30	0
air sales 360	0
- Visit History:** last visit (03/31/2011), last inbound call (03/29/2011), and last sale (03/29/2011).
- Buttons:** 'Change...', 'More...', 'Add Visit...', and 'Attributes'.

Here you can see all kind of information such as status, price code, shop type, sales history, last visit/call/sale, and more!



To the left is an example of the kind of sales data that you can see when you click "More" in the previous window and select a part category.

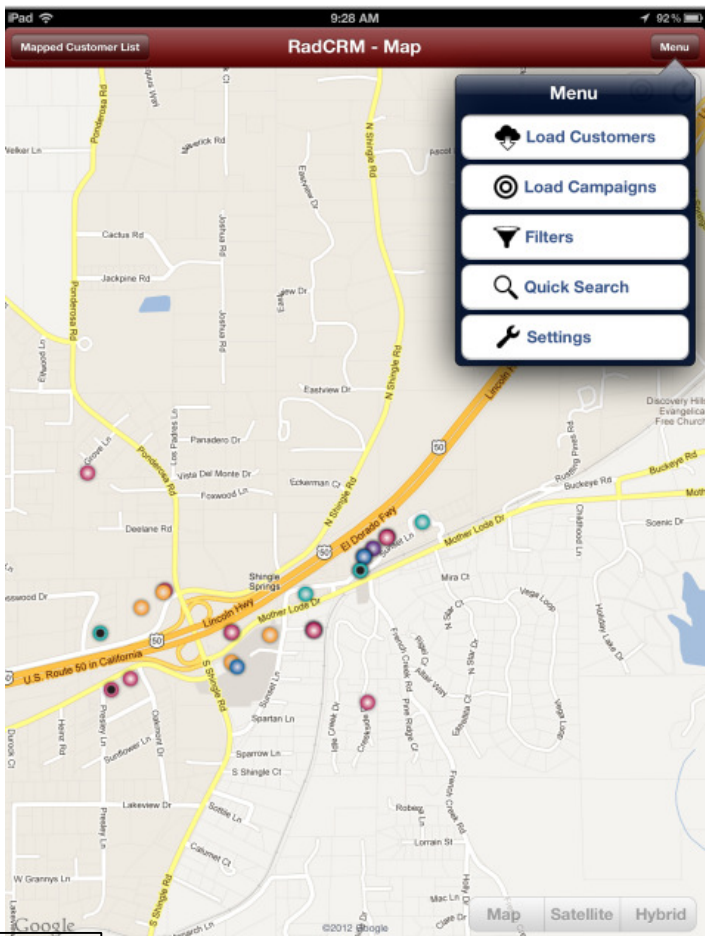
Best of all, you now have the ability to enter your visit, complete with marketing material given, attributes, and notes, as you leave the shop!

A screenshot of the 'Enter Visit' form. The form includes fields for 'Visited' (with a blue arrow icon), 'Air Stim' (with a blue arrow icon), and a date field set to '05/31/2012'. Below these fields is a text area labeled 'Remember to leave good notes!'. The form has 'Cancel' and 'Save' buttons at the top. A keyboard is visible at the bottom of the screen.

iPad CRM

Menu Functions

Clicking on Menu in the upper right gives you these selections.



Load Customers: This is where you go to sync the iPad app with your customers. Data refreshes each night, so remember to do this every morning before you hit the field!

Load Campaigns: Go here to search for campaigns that have been uploaded for you through Wizmo CRM. *(see next page)*

Goodbye paper visit lists!

Filters: Click here to only see specific shop types or shops with specific marketing statuses. *(Great for omitting Status X shops whilst looking for shops around you)*

Quick Search: Parked in front of a shop and wondering what kind of buyer they are? Go here and search for them by name.

Settings: Need to log out and have another user log into the app? Go here to switch user.

Campaign Search

date: 5/20/2012 view

name: first last

campaign type: reason

Search Reset

date	code	reason	count
05/29/2012	AC/Cor1 - Whee 3	H	2
05/29/2012	AC/Cor1 - Whee 3	C	3
05/29/2012	AC/Cor1 - Whee 3	D	9
05/29/2012	AC/Cor1 - Whee 3	DI	2
05/29/2012	AC/Cor1 - Whee 3	A	3
05/29/2012	AC/Cor1 - Whee 3	B	3
05/29/2012	AC/Cor1 - Whee 3	I	10

Customer Filters

Customer Type Group: 11 items

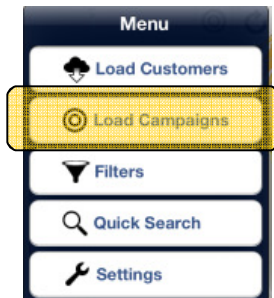
Not visited in last...: 7 days

Customer Status: 10 items

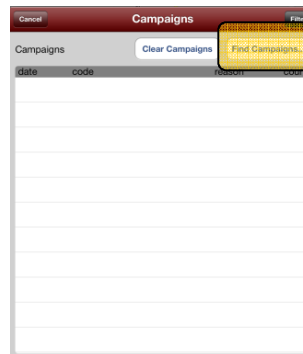
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Searching for Existing Campaigns

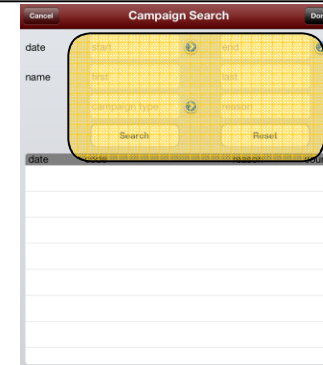
Step 1: Click on **Menu** in the upper right. Then tap **"Load Campaigns"**



Step 2: The screen below will appear. Click on **"Find Campaigns"**



Step 3: You'll now see the Campaign Search screen. Search by campaign type and/or date range.



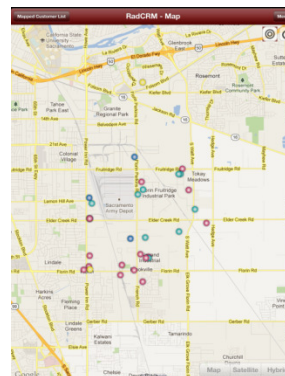
If your campaign has more than one reason, the campaign will be split by reason in the search results. Select all results with the same Campaign Name to ensure that you get all the PIDS from your campaign.

Step 4: Click **"Filter"** after making your selections.

The screenshot shows the same table as in Step 2, but with a yellow box highlighting the 'Filter' button at the top right.

date	code	reason	count
05/29/2012	AC/Core1 - Whse 3	H	2
05/29/2012	AC/Core1 - Whse 3	C	3
05/29/2012	AC/Core1 - Whse 3	D	9
05/29/2012	AC/Core1 - Whse 3	DI	2
05/29/2012	AC/Core1 - Whse 3	A	3
05/29/2012	AC/Core1 - Whse 3	B	3
05/29/2012	AC/Core1 - Whse 3	I	10

You will be shown a map of the customers that are part of your selected campaign(s).



Each PID will have the campaign name as well as the Reason for visit in their Customer Detail screen.

