



iCRM

for Android Mobile Device

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Firstlink iCRM for Android Mobile Device

Firstlink iCRM for Android Phone & Tablet - Overview

Accessing your Firstlink CRM on your Android Phone or Tablet is now simple with **Firstlink iCRM**. To learn how to download, install, configure and manage your daily activities in **Firstlink iCRM**, you may find out more at the subtitles below.

How to activate iCRM in Firstlink CRM?

Activate iCRM in Setup & Get Start-up

In order to let users to be able to synchronize data from Firstlink CRM to their respective Android mobile device, your System Administrator needs to assign Mobile CRM license to the user.

- Login to CRM and click 'Setup' on the Top Right corner.
- Click on the Admin Setup > Manage Users > Setup Users.
- Select the users by ticking on the check-box at the Control Column and follows by clicking 'Assign Mobile CRM'.
- The assigned users can now proceed further to download iCRM in their Android device and logging into iCRM.

How to download iCRM?

Downloading Firstlink iCRM & Start-up

Follow the steps listed below to download and run iCRM on your Android mobile device:

1. Search for Firstlink iCRM in the Play Store application and install it on your Android mobile device.



2. Tap the Firstlink iCRM to run the application.

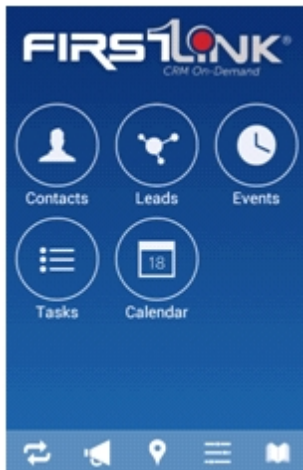
Logging into iCRM

1. Tap on the iCRM icon to get started.
2. You are required to vet through the Firstlink iCRM End User License Agreement before accepting it.
3. iCRM offers user Online or Offline mode to login CRM.
 - Online Mode = Involve data synchronization from/to Firstlink CRM
 - Offline Mode = Trial Mode and no data synchronization.






Learn more on iCRM Home Page

Home Page

1. Home Tab shows 5 Modules i.e. Contacts, Lead, Events, Tasks & Calendar.



2. The icons displayed in the bottom of screen are used for:-




- | | |
|---|---|
|  | Data Synchronization (from/to CRM server) |
|  | Announcement which made in CRM |
|  | Nearby Places |
|  | Setting |
|  | User Manual |

Leads & Contacts

How to View Leads/Contacts?

1. In Home Page, tap on respective icon to view Leads/Contacts.
2. Once in Leads/Contacts listing page view, tap the icons to:-













-  Return to home page
-  Add new record
-  Search Leads/Contacts by keywords

** Tap '**New This Week**' to change page view to '**Modified This Week**' or '**My Leads/Contacts**'

3. To view the details of the Leads/Contacts, tap on the Name link of the particular Leads/Contacts.

How to Add or Edit Leads/Contacts?

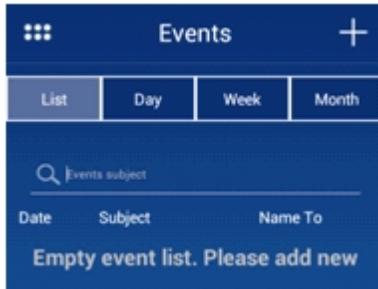
1. There are 2 options to add new records:
 - Address Book: Import Leads/Contacts' data from your device's Address Book.
 - Manual Entry: Key in manually.
2. In each Leads/Contacts' Profile, you may tap on the icons to:-




- | | |
|---|--|
|  Edit or update profile |  View the Activity History of Calls, SMS and Emails. |
|  Save |  View the Opportunities |
|  Send Message to Leads/Contacts |  Create Tasks |
|  Send Email to Leads/Contacts |  Create Events |
|  Call Leads/Contacts |  Delete |

Events

How to View Events?




1. In Home Page, tap on Events icon.
2. Once in Event listing page view, tap the icons to:-



	Return to home page		View all Events in Listing
	Add new record		View Daily Events
	Search Events by keywords		View Weekly Events
			View Monthly Events

3. To view the details of the Events, tap on the Subject of the particular Event.
4. You may also view the Events under Calendar module.
 - o For more info, please refer: [How to View Events/Tasks in Calendar?](#)

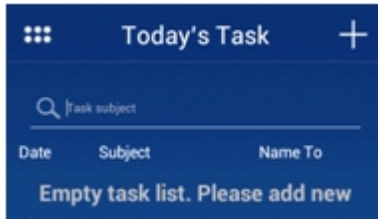
How to Add or Edit Events?

1. In Home Page, tap on Events icon.
2. In Event listing page view, tap  to add new event.
 - o To edit Event, tap Subject of the particular Event and then tap .
3. After filling up the necessary details, tap  to save.
4. For each Events, you may set maximum 3 Email Notification.
5. By default, iCRM shall set 2 alerts to your mobile device, which are 15 minutes and 1 hour before Event Start Date.

Tasks

How to View Tasks?

1. In Home Page, tap on Tasks icon.
2. Once in Task listing page view, tap the icons to:-



Return to home page



Add new record






Search Task by keywords

** Tap **'Today's Task'** to change page view to **'Today + Next 7 days'** or **'Overdue'**


3. To view the details of the Tasks, tap on the Subject of the particular Task.
4. You may also view the Tasks under Calendar module.
 - For more info, please refer: [How to View Events/Tasks in Calendar?](#)

How to Add or Edit Tasks?

1. In Home Page, tap on Tasks icon.
2. In Tasks listing page view, tap  to add new task.
 - To edit Task, tap Subject of the particular Task and then tap .
3. After filling up the necessary details, tap  to save.
4. For each Tasks, you may set maximum 3 Email Notification.
5. By default, iCRM shall set 2 alerts to your mobile device, which are 15 minutes and 1 hour before Tasks' Due Date.

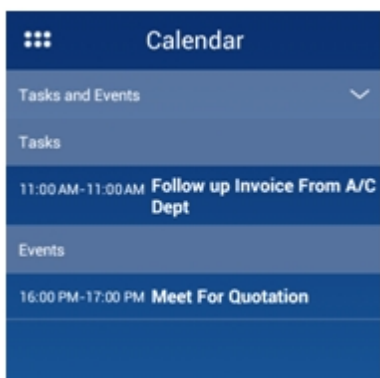
Calendar

How to View Events/Tasks in Calendar?

1. Tap on Calendar icon at the Home Page.
2. All Events and/or Tasks are listing below Calendar.
 - To **Hide** the Calendar, tap on the  icon.



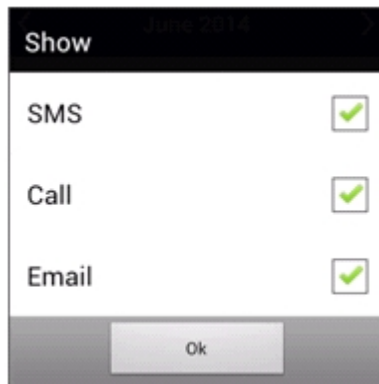
3. Tap on Events or Tasks' subject to view the details.



4. To view events/tasks in particular date,
 - tap on the particular date displayed in Calendar, *OR*
 - tap on the **month**, **<** or **>** to find the particular date.



5. The bullet • showed in the Calendar represents that there's event(s) or task(s) made on the particular date.
6. To filter the category of Tasks which to be displayed in Calendar, tap on the 'Calendar'.



- Tick only the category which to be displayed in Calendar.


What is Nearby Places?

Nearby Places Tab

1. The nearby Contacts or Leads' address will show in the list compare to your current location in range 0-5 km; 5-10km; 10-15km and 15-20km.



2. You may just tap on the location range on top of the screen and iCRM will be able to identify Leads/Contacts based on the address input into the system.
3. Once you tap on the particular Lead/Contact displayed, the following screen will show you a simple map.

4. You may tap on the icon  at the top right corner to have a detail Google map.

What is Setting for?

Setting Tab

1. **Passcode Lock**

- You may change your passcode by tapping on the Passcode Lock.

2. **Android Setup**

- There are 3 options available:
 - ☐ Import Android Address Book as CRM Contacts/ Leads
 - ☐ Clear CRM Events & Tasks from Android calendar
 - ☐ Reset Android CRM Data

3. **About**

- You may find more details about Firstlink Sdn Bhd.

4. **Sign Out**

- You may sign out by tapping on the Sign Out.
- Below Synchronization Message will be prompted out:-
 - **Sync Now**: Tap if you wish to Sync Data from/to CRM Server.
 - **Cancel**: Tap if you do not wish to Sync Data after sign out. Then tap OK if you wish to continue Sign Out.