



## update CRMpad for iPad

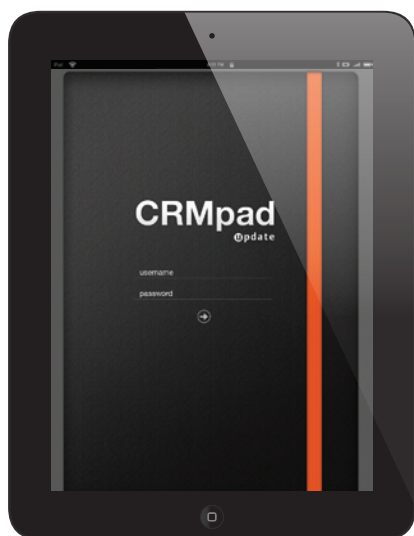
# Mobile CRM: quick, easy, intuitive

## ... for even more productivity and success for your sales team!

Mobile CRM continues to blaze new trails, creating even better customer support thanks to modern, more intuitive devices. update CRMpad, another product for professionals, is mobile CRM that allows you to access all the CRM data you need even when you are on the road. The app accesses the update.seven CRM system and processes customer data, contact, lead, task, and order management directly.



Designed and developed especially for the iPad, this native iPad app unites the advantages of your customary CRM solution with the user-friendly intuitive operation of the iPad.



### Product Sheet | At a glance

#### Key Benefits

- Access to current CRM data (on and offline) wherever you are
- Dashboard for efficiently scheduling visits and setting calendars
- Productive use of waiting and travel times
- GPS support and integration with Google Maps
- Best user experience thanks to intuitive, context-related navigation
- Intelligent filter and search functions
- Global search across several entities
- Flexible and detailed adaptation of screens
- Quick order recording with shopping cart function
- Point-of-sale assessment and listing check
- Integrated document viewer  
(pdf, ppt, xls, doc, images, videos, etc.)

#### For whom is this paper of interest?

- Sales employees who need access to data while out of the office
- Pharmaceutical reps who need to document POS visits
- Finance and insurance consultants who need access to current contract data
- Companies that want to equip their employees with mobile devices
- IT professionals who integrate mobile devices and CRM

» Our customers are more **successful**.

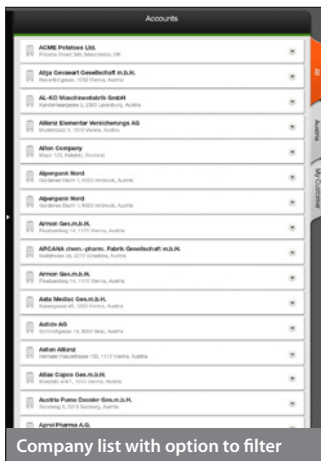
# update

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- ✓ Efficient calendar-setting and visit preparation
- ✓ Advising and mobile order recording
- ✓ GPS support and Google Maps
- ✓ Installation, synchronization and security

Product Sheet  
update CRMpad

## Handle appointment changes with ease – with online access to Google Maps you can quickly find other customers in the same area.



Company list with option to filter

Our development goal was to offer CRM users the functions they need the most based on practical applications. The focus is on clarity, intuitive navigation, and high usability. Our goal of focusing on the essentials and offering familiar iPad features makes it easier for you to use, so you reach your goals more quickly.

Mobile work has already become standard for sales teams. But there

is a right device for each activity – and, if your sales teams like working with a device, you gain both their acceptance and greater efficiency.

With short start-up times and a clear touch display, tablets allow quicker access to your data and help you embed multimedia elements and scalable document views into your customer presentations. Since the CRM data is also available offline, users can work completely independently without needed mobile phone networks or WLAN to call up information.

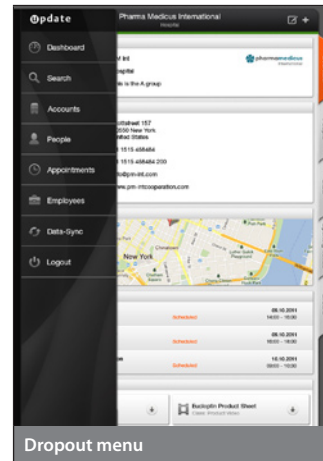
With the update CRMpad app, you always have all essential information on hand, on the road, during telephone calls and visits – online and offline – exactly as you need it.

### Dashboard

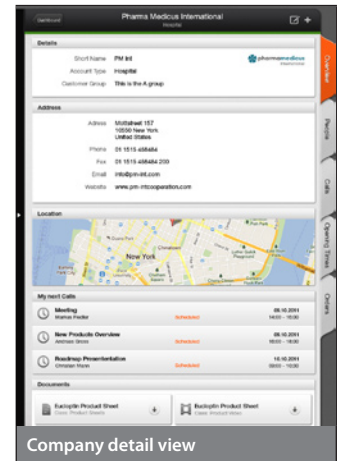
The clearly-arranged dashboard is the starting point for working with all relevant CRM data. It provides a quick overview of all visit dates and tasks, and an interactive map with location display of the planned appointments.

### Visit preparation

Efficient preparation prior to customer appointments and the immediate availability of information are important components of the daily routine of a sales employee. Users can read all essential information at a glance as they plan their schedules.



Dropout menu



Company detail view

This includes information about all activities that have taken place with a particular contact or customer since the last visit. What products is the customer using? Are there open service tickets? What is the order status? Users can see right away whether there are open issues that need to be discussed during the appointment and whether or not to make a special offer. Sales employees are well-prepared for every appointment and can exploit potential sales opportunities to the fullest.

### Advising and mobile order recording

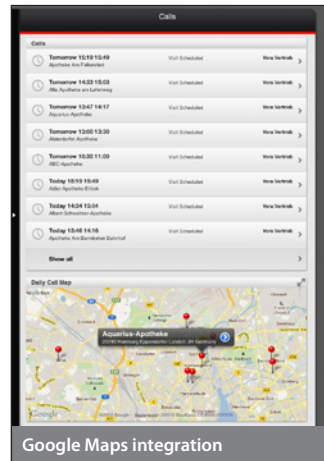
As they meet with prospects or customers, sales employees can better present new products and offers and view documents with them on the iPad. Users always have access to the most current version of contracts and orders can be recorded directly at the customer's site – even in regions or buildings with poor reception. The app also offers serial recording of orders with stored items, prices, discounts, and a shopping cart function. A specially-designed touchscreen keyboard allows quick and efficient data entry.

During the customer appointment, users can record, check, and update data. Input on-site increases the quality of data which is then available centrally immediately. Your sales team can agree on details with their customers as they input data, greatly simplifying administrative tasks. Customer information is always up-to-date and valuable time has been saved.

## With serial entry, you can record orders quickly and efficiently – anywhere you are – directly into the CRM system.

### Visit control with GPS support & Google Maps

When planning and control is of utmost concern, access to geographic information clearly makes efficient day planning easier. With the built-in GPS, users can search for customers who are near them, giving sales employees the option to contact a different customer nearby if appointments change or cancel. The seamless integration of Google Maps shows customer addresses on area maps. When users search for the right route, they can enter the address directly into the Google Maps app on the iPad to calculate the route.



If the iPad gets lost, the administrator can delete all data remotely and block usage of the iPad. The use of a Mobile Device Management Server (MDM) is also recommended.

For more information, visit:

[www.apple.com/iphone/business/integration/mdm](http://www.apple.com/iphone/business/integration/mdm)

[www.apple.com/ipad/business/docs/iPad\\_Security.pdf](http://www.apple.com/ipad/business/docs/iPad_Security.pdf)

### Infrastructure requirements

**Operating system:** iOS 5.0 or higher

**Hardware:** iPad 1, iPad 2 and future models

**Data connection:** 3G or WIFI

**update CRM system:** update.seven (Service Pack 8)

### Flexibility and configuration

Like all products in the update CRM Suite, update CRMpad is easy to use and configure. Elements such as fields, lists, and screens can be adapted to individual needs with a few clicks. The CRM data and business processes that are available to the user by the application depends on the user's configured role in the update.seven system.

### Installation and synchronization

The update iPad App is installed via download from Apple App-Store. update customers with an appropriate end user license for mobile services need only the valid log-in information for their system. When logging in with the CRM user data, the appropriate settings are loaded. Changes to the configuration are transferred and taken over automatically after re-synchronization with the application.

### Security

Guaranteeing the security of sensitive company and customer data is indispensable for a mobile state-of-the-art CRM solution. In addition to SSL encryption during the transfer of information, the iPad protects data saved on the device against unauthorized access via 256-bit AES hardware encryption. This mechanism cannot be deactivated by the user.

### Advantages

- ✓ Available in English, German, and French
- ✓ Easy installation via the Apple App Store
- ✓ Central configuration and administration
- ✓ High access security thanks to log-in process and encryption methods
- ✓ High security for sensitive customer data on the device
- ✓ Single sign-on support
- ✓ Display of HTML content
- ✓ Efficient caching of CRM data for offline access

# revolution

## Our products

### Web-based CRM Application



All CRM processes in your Browser  
**update.seven web**

### Mobile CRM



CRM-App for iPad  
**update CRMPad**



Mobile- & Smartphone Client  
**update.seven mobile & touch**



Your Client for the Road  
**update.seven web offline**

### Social CRM



Social Media Integration  
**COSMIC**

### Integration



Interfaces to your System Environment  
**update.seven webservice | update.seven interface**



Telephone Integration  
**update.seven phone**



Appointment, Calendar & E-mail Synchronization  
**update.seven groupware | update.seven connector**

### Administration | Analysen



Configuration Management & Documentation  
**update.seven cockpit**

Evaluation Functionality  
**analyses & reporting**

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### Interested?

If you want to receive more information about our products and services, just let me know.



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» Our customers are **more successful.**

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