

# **SalesLogix Mobile BlackBerry Client**

Users Guide

March 3, 2006

## Installation

To install the BlackBerry client, double click on the SalesLogixMobileBlackBerryClient.exe file and follow the prompts.

**NOTE: Each time the Client is installed over a previous version, you must give that user a new Site Code in the Administrator.**

## Glossary of Terms

The following describes terms used throughout this manual.

Term	Meaning
Scroll	Scroll using the track wheel.
Tap	Tap the track wheel.

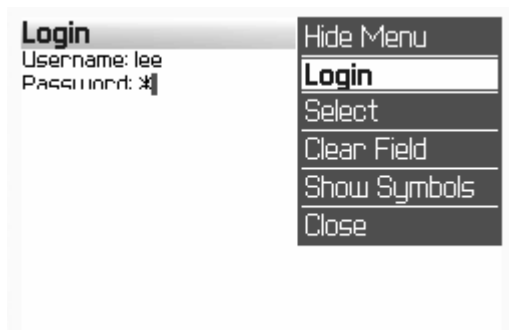
## Quick Start

### *Running the SalesLogix Mobile BlackBerry Client*

Locate the SalesLogix Mobile Client and run it.



After launching the application, you will be prompted to log into the application with a user name and password. Use the menu to select Login



After successfully logging in to the application, the Clients main menu screen will be displayed. Here you are presented with a list of available items.



NOTE: You can easily switch between the BlackBerry Client and other applications running on your BlackBerry device by using the built-in task switcher which is available by pressing the **Alt + Esc** keys on your device. This will bring a list of running applications. To change to another application simply highlight it by scrolling to it and clicking it using the track wheel.

## Basic Navigation

The BlackBerry client uses standard BlackBerry navigation.

## Basic Form Navigation

Action	Steps
Open an item on the Main Screen	Highlight the item and <b>Tap</b> . If your device has a Next key, you can also use that.
Move between tabs	Scroll until the tab is highlighted. While holding down the <b>Alt</b> key, scroll until the desired tab is highlighted and <b>Tap</b> to display the tab.
Highlighting text in a field.	Hold down the <b>Shift</b> key and scroll.
Activating a control via its icon.	Scroll until the icon is highlighted and <b>Tap</b> .

## Grid Navigation

Action	Steps
Moving between fields and grids	<b>Scroll</b>
Move to the first row	Type <b>f</b>
Move to the last row	Type <b>l</b>
Page up	Type <b>p</b>
Page down	Type <b>n</b>
Opening a highlighted grid item.	<b>Tap</b>

## Configuring the BlackBerry Client

Before you can access data on your device, you must first provide information that will be used to synchronize data and application changes between your device and the server. This is normally a one-time only step.

<b>Configuration</b> <b>User Settings</b> Username: lee Password: **** Confirm password: **** Mobile ID: 1004  <b>Server Settings</b> Server: myserver Port: 80 Virtual root: CorumMobile40 <input type="checkbox"/> Use SSL	Hide Menu <b>Save</b> Select Clear Field Show Symbols Close
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### User Settings

Setting	Description
User Name	The name used to log into the device.
Password	Password used to log into the device.
Confirm Password	Must match the password.
Mobile ID	The id by which the user is identified on the server.

### Server Settings

This information will be provided by your system administrator.

Setting	Description
Server	The http or ip address of your server.
Port	This value is normally set to 80.
Virtual Root	The default value is SalesLogixMobile40.
Use SSL	Default is unchecked.

## Search Screen Basics

The search screen is the starting point for working with individual records. From the results grid you can open a record for editing, delete records or create new records.

### Performing a Search

Selecting an item off the Main Menu will bring up a search screen allowing you to search for particular items.

Accounts		Hide Menu
Query:	All Accounts	<b>Search</b>
Field:	Account	Change Option
Condition:	Starts With	Close
Value:		
Account	Phone	

The search screen allows you to search using a pre-defined query (i.e. All Accounts, Suppliers, etc...). You can refine the search by searching for a particular value in a field using one of the supported Conditions (=, Not =, Starts With, Ends With, Contains, Does Not Contain).

To perform the search, click on **Search** in the menu. The results will be displayed in a grid below the search criteria.

Accounts		Hide Menu
Query:	All Accounts	<b>Open</b>
Field:	Account	Add
Condition:	Starts With	Copy
Value:		Close
Account	Phone	
Abbott Ltd.	(312) 555-7853	
Advising Group	(312) 555-8500x630	
Alcopter Investments	(309) 555-5500	
Amtec & Lehman	(618) 555-7479	

### ***Opening a record***

You can use the track wheel to scroll through the records returned from the search. Once the desired record is highlight simply select **Open** from the menu.

### ***Adding a new record***

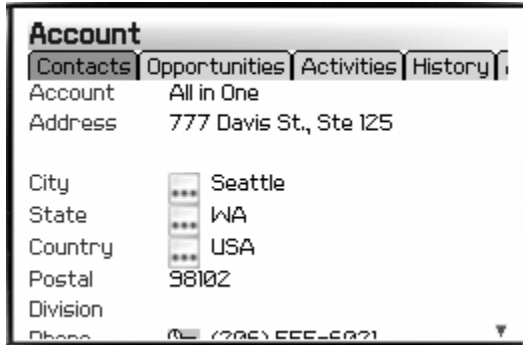
New records for the current item being searched (i.e. Accounts) can be added by selecting **Add** in the menu.

## **Working with Records**

Individual records are managed through edit forms which organize the data through the use of tabs.

Account	
Main	Detail
Account	All in One
Address	777 Davis St., Ste 125
City	Seattle
State	WA
Country	USA
Postal	98102
Division	
Phone	(206) 555-5021

Some tabs contain various controls that present individual pieces of information like an accounts name or address while others contain grids used to display records from other items (such as contacts) that are related to the current record. An example would be a grid showing a list of contact associated with an account.



**Account**

Contacts Opportunities Activities History

Account All in One

Address 777 Davis St., Ste 125

City Seattle

State WA

Country USA

Postal 98102

Division

Phone (206) 555-5821

## ***Working with new records***

It is important to note that not all tabs will be visible when entering data for a new record. For instance, when creating a new Account only the Main, Detail and Contacts tabs will be visible. Once the record is saved, the other tabs will be available.

## ***Working with special fields***

There are some special form fields that provide special functionality.

### **Picklists**

City  Chicago

These controls allow you quickly and accurately enter data from a list of values which can be displayed by **Tapping** the icon. Some controls give the option of entering data directly in the control while others force you to select from the value list.

Simple search functionality is built into the value list that is displayed when **Tapping** the picklist icon. The values are alphabetically sorted and typing a letter you are brought the values that begin with that letter.

### **Table Lookups**

Account  Abbott Ltd.

These controls allow you to quickly and accurately enter data from values stored in another table by **Tapping** the icon.

### **Email Fields**

E-Mail  jabbot@abbot.demo

This control allows you to compose and send an email. **Tapping** the icon will bring up a new email form with the email address pre-populated with contents of the control.

## Phone Fields

Home Ph.  (312) 555-3543

This control allows you to make a phone call using the value stored in the control by **Tapping** the icon. Your device must be equipped with a phone in order for this functionality to work.

## Web Address

Web Address  www.abbott.com

**Tapping** on the icon will bring up a browser with the address pre-populated with the contents of the control.

## *Saving a Record*

To save a record, click on **Save** in the menu.