**Making
Software Simple**

Infor CRM Mobile Client v4.0

Here are some frequently asked questions that we hear from our customers. We have provided the most common solutions. If you are still running into the problem, contact your IT department or Simplesoft Solutions for more detailed trouble shooting.

How can I quickly access Infor CRM Mobile on my phone?

- Once you open CRM up in your browser, navigate to your internet settings and save a shortcut to your home screen.
- Once you enter your log-in credentials, don't forget to choose Remember Me. This saves your log-in for next time you access.

I can't access anything when in an area with no cell service?

If you plan ahead and use the Briefcase option on your Mobile CRM you can have access offline to information. When you have a record open, click on the briefcase icon to save the information for use offline. Read more on this topic on our blog.

How can I change what groups show when I log in?

1. Upper Right corner of screen, click on 3 dots
2. Select Configure
3. Your list of Groups will populate
4. Click to the left of the Group name to add a Check mark; this selects the group as an option for you to see

How do I search on mobile?

There are 2 ways to search on mobile. The first way is when you are within a group view, at the top there's a search bar to use. If you're having trouble finding the Account or Contact try to just search the first part of the name for more results.

Or you can open your navigation menu to the left and use the speed search bar. Remember speed search will look through the entire database. If you search within a table, it only searches that table. Example: If you are in All Accounts Group and you use the search bar above it, it only searches that group.

Can my layout be changed?

Yes. Open up the left side navigation menu. There's a tab called Other. This is where you can adjust what you see when navigating the mobile CRM.

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Watch this quick video for more detail on the tips and tricks discussed above.