



## Project-SalesAchiever CRM - Mobile

The purpose of this document is to give an overview of Project-SalesAchiever™ CRM running on a web-enabled mobile device, huge configuration options are available to optimise the configuration for a particular business.

### **Live Access to Projects, Companies, Contacts, Activity, Quotations and Sales information**

Full access to all Project-SalesAchiever modules through any browser enabled handheld device of your choice.

### **Will work with any handheld device with browser capability<sup>1</sup>**

Project-SalesAchiever mobile can be used on any handheld device with internet browsing capability

### **Standard solution or fully customized for your business**

The Project-SalesAchiever mobile device can be customized fully to meet the individual requirements of any company using Project-SalesAchiever CRM



To log into Project-SalesAchiever™, enter your username and password.



## Searching for a Company

We are then presented with the main screen, from where we have quick access to key features and is always the home screen.

We can search for a company by simply entering the name of the company in the search box and selecting 'Go'



The results of this search are then shown; the layout of the search results along with most other aspects of the system can be configured

To open a specific Company we simply click on the company name, which will then display all of the company details:



**Company Details**  
[View Contacts](#)  
[View Projects](#)  
**Name**  
H & H Architects  
**Address**  
Lynton House  
12989 N City Pkwy W  
Phoenix  
Arizona  
85001  
**Contact Details**  
Save Close



## Viewing a Project

If we select **View Project** it will then show all of the Projects linked to this Account as shown below

Clicking on the linked Project will show all of the project details:

Linked Contact and Project records can easily be viewed by selecting the options highlighted in blue at the top of the screen.

[Back to Company](#)  
[135 Apartments, 585-589 NW Parkway, Phoenix](#)



From here additional information about the site can be access or we can view the linked company records.

### Viewing a Contact

When viewing the Company details the user can also View Contacts by selecting **View Contacts** option highlighted in blue at the top of the screen.

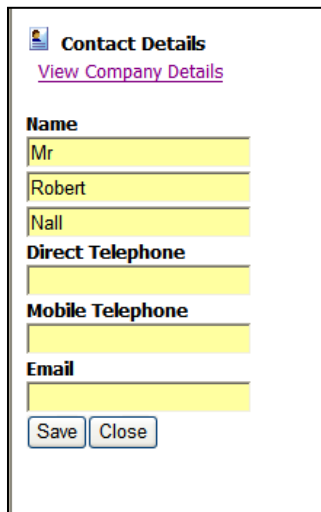
[Back To Company](#)  
[Robert Nall](#)



**Company Details**  
[View Contacts](#)  
[View Projects](#)  
**Name**  
H & H Architects  
**Address**  
Lynton House  
12989 N City Pkwy W  
  
Phoenix  
Arizona  
85001  
**Contact Details**

This will then present you with all of the contacts recorded in the account

We can click on the contacts name to view further details on the contact such as telephone numbers and email addresses



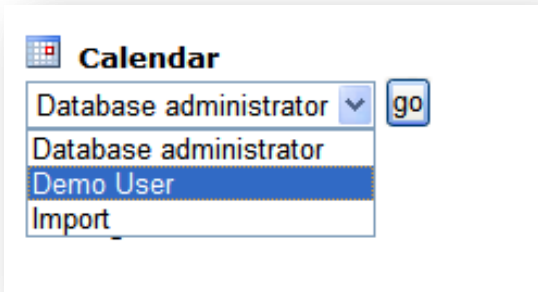
**Contact Details**  
[View Company Details](#)  
**Name**  
Mr  
Robert  
Nall  
**Direct Telephone**  
  
**Mobile Telephone**  
  
**Email**

We can also search for specific Companies, Projects and Contacts by using the search for box on the main screen

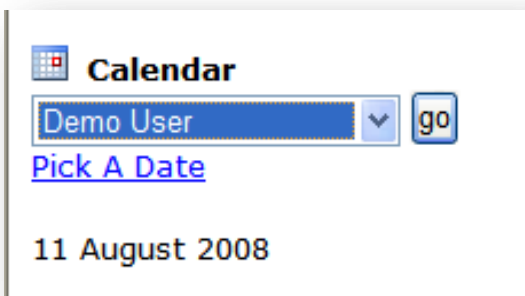


### Viewing the Diary

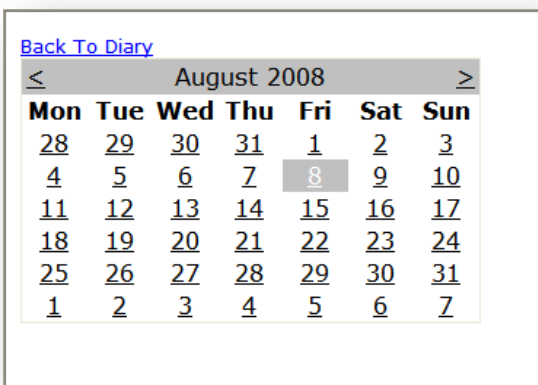
We can easily access the diary by selecting the **Diary** option and then selecting the user whose diary we wish to access.



Once we have selected the relevant user click to pick a date



This will then display date options, double click on the date and we will see all diary entries for that date.



## Now available on the Iphone

Project-SalesAchiever CRM is now available on the Iphone. Please contact us for a demonstration and more information.

