Bridge2CRM

Dynamics CRM + Mobile

Bridge2CRM Enhancements : May 2009

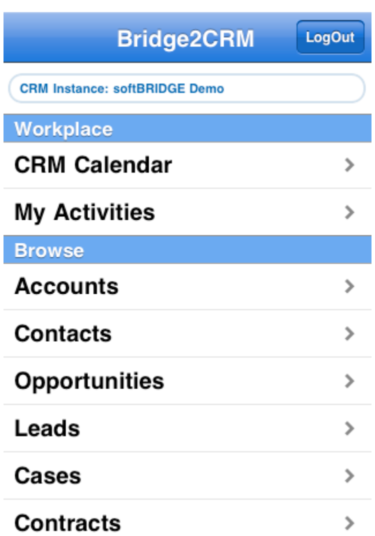
Here is a listing of the recent updates and enhancements made to the Bridge2CRM application.

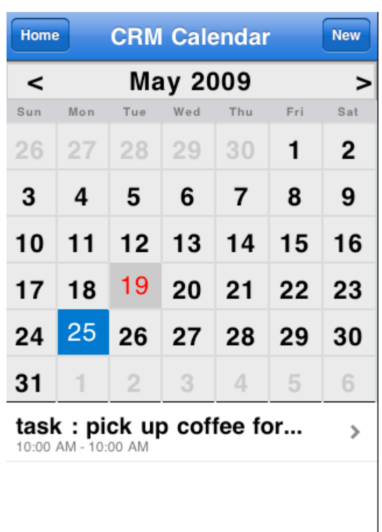
CRM Calendar

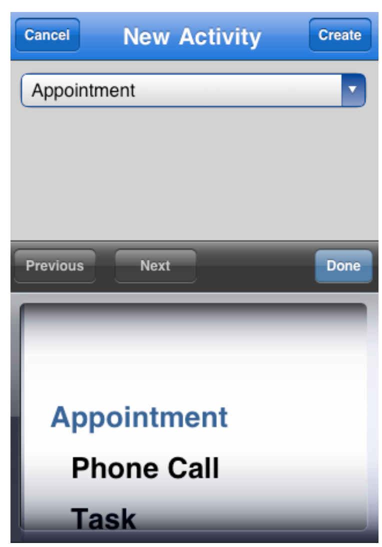
Need to see what CRM Activities you have due next week? Bridge2CRM has added a unique CRM Calendar to the long list of product features. You can View, Edit and Create your CRM Activities straight from Bridge2CRM. Dates are color coded to let you know when you have something book already. This Calendar also acts as our new Date Picker control whenever the user needs to specify a date value. The CRM Calendar is located on your Bridge2CRM home screen.

The calendar ONLY includes Activities that meet the following criteria :
a.) have a DUE Date assigned to them
b.) have a status of “open” or “scheduled”
c.) Exist in the list of published entities (meaning the Admin has published them to the phone)

Other activities a user has created without a Due Date can still be created/viewed/completed using the My Activities tab found in Workplace on the Home screen. It is important to note that only CRM Activities appear on the calendar. Activities created in a clients MS Outlook that are not connected to CRM will not appear in this calendar.







In-Place Editing

In order to speed up the data-entry process when editing or creating new records, we have converted our Edit screens to support in-place edit controls. Basically this means that the common Text, Numeric and PickList fields will all be editable from the main edit screen, while complex controls like the Calendar and Entity Lookups will still require a second screen to capture the data.

Required fields are in red, and all validation messages appear when you Save your data.