



BlackBerry Sales Client for SAP CRM

User Guide

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Basics

About the BlackBerry Sales Client for SAP CRM

The BlackBerry® Sales Client for SAP® CRM allows you to access the data from your corporation's SAP CRM application from your BlackBerry device. You can use the BlackBerry Sales Client for SAP CRM to manage leads, CRM accounts, and CRM contacts. Any changes that you make in the BlackBerry Sales Client for SAP CRM on your device are reflected in your corporation's SAP CRM application. Likewise, any changes that are made in your corporation's SAP CRM application are reflected in the application on your device.

Email a CRM contact

1. On the Home screen, click the **BlackBerry Sales Client** icon.
2. Press the **Menu** key.
3. Click **Contacts**.
4. Click a contact.
5. Press the **Menu** key.
6. Click **Email Contact**.

Call a CRM contact

1. On the Home screen, click the **BlackBerry Sales Client** icon.
2. Press the **Menu** key.
3. Click **Contacts**.
4. Highlight a contact.
5. Press the **Menu** key.
6. Click **Call <contact>**.

Log a call or email message to a CRM account

1. Perform one of the following actions:
 - From the Home screen, press the **Send** key. Highlight a call log.
 - On the Home screen, click the **Messages** icon. Highlight an email message.
2. Press the **Menu** key.
3. Click **Save to CRM**.
4. Type the information for the call or email message.
5. Press the **Menu** key.

6. Click **Save**.

Search for a CRM account, contact, or lead

1. On the Home screen, click the **BlackBerry Sales Client** icon.
2. Type text to search for in the **Find** field that appears at the top of the account list, contact list, or leads list.

Manage CRM contacts and accounts

Add a CRM contact

1. On the Home screen, click the **BlackBerry Sales Client** icon.
2. Press the **Menu** key.
3. Click **Accounts**.
4. Click an account.
5. Press the **Menu** key.
6. Click **Add Contact**.
7. Type the contact information.
8. Press the **Menu** key.
9. Click **Save**.

Add an existing contact to your CRM contact list

1. On the Home screen, click the **Contacts** icon.
2. Highlight a contact.
3. Press the **Menu** key.
4. Click **Save to CRM**.
5. Click an account.
6. Type the contact information.
7. Press the **Menu** key.
8. Click **Save**.

Change a CRM contact

1. On the Home screen, click the **BlackBerry Sales Client** icon.
2. Press the **Menu** key.
3. Click **Contacts**.
4. Click a contact.
5. Press the **Menu** key.
6. Click **Edit Contact**.
7. Change the contact information.
8. Press the **Menu** key.
9. Click **Save**.

Change a CRM account

1. On the Home screen, click the **BlackBerry Sales Client** icon.
2. Press the **Menu** key.
3. Click **Accounts**.
4. Click an account.
5. Press the **Menu** key.
6. Click **Edit Account**.
7. Change the account information.
8. Press the **Menu** key.
9. Click **Save**.

Leads

About leads

When you receive a new lead for an account, your BlackBerry® device displays the new lead indicator at the top of each screen and beside new leads in the leads list. Your device also displays the new lead in the messages application. If you open the lead from the messages application, your device opens the lead in the BlackBerry® Sales Client for SAP® CRM.

Change a lead

1. On the Home screen, click the **BlackBerry Sales Client** icon.
2. Press the **Menu** key.
3. Click **Leads**.
4. Click a lead.
5. Press the **Menu** key.
6. Click **Edit Lead**.
7. Change the lead information.
8. Press the **Menu** key.
9. Click **Save**.

Troubleshooting

I cannot log in to the BlackBerry Sales Client for SAP CRM

To log in to the BlackBerry® Sales Client for SAP® CRM, type your SAP system user name and password. For more information about the login information that you should use, contact the administrator that deals with SAP support for your organization.