

Introduction

With the current trend moving towards integrating business and private lives, using the mobile phone as a platform for a business application is rapidly gaining popularity. The functionalities developed for mobile users are burgeoning at an impressive rate. As mobile phones are already widely used and prove to be handier compared to other communication tools, **Mobile Synergy** is introduced to take advantage of the endless possibilities.

Mobile Synergy provides a platform for people on the go, especially account managers and business users to access important information available in the **Exact Synergy Enterprise** application via mobile phones. **Mobile Synergy** is built to work on all modern smart phones manufactured from Q4 of 2008 and also support multiple browsers. With your mobile phone, you can have constant access to requests in your workflow, information of accounts and contacts, as well as your business opportunities. Viewing only information that is related to you becomes easier with its simplified design, allowing you to quickly comprehend the information without losing out on your most important deals.

What has been changed?

You can use your mobile phone to access the **Exact Synergy Enterprise** application to view information in your workflow and other work-related information, such as accounts, contacts, and opportunities that you manage. You need to have role **950 Mobile** assigned to you before you can access to **Mobile Synergy**.

With **Mobile Synergy**, you can perform various tasks, but are not limited to the following:

- a) View your requests that have basic but relevant information shown. The requests are grouped accordingly so that you can quickly search for unread requests, requests that have been recently viewed, or all requests that are listed in your workflow. The number of unread requests can also easily be identified from the number displayed on the top right of the screen.
- b) View opportunities managed by you (including documents, requests, and contacts linked to the opportunities), via two overview available for ease of searching. From here, relevant information such as the current stage and end date of an opportunity are displayed. It will be possible to compose and send an e-mail to the contact listed with a simple click.
- c) View accounts that are managed by you (including documents, opportunities, requests, and contacts linked to the accounts), via two overviews available for ease of searching. From here, a simple click allows you to make a call, compose and send an e-mail, open websites to social network, and search in Google maps. In addition, your pending and completed activities can be easily viewed by clicking **Activities** and **Archive** respectively. See the following for an example:



You can start to use **Mobile Synergy** once you have installed the latest **Exact Synergy Enterprise** application.

To launch **Mobile Synergy**, simply pick up your phone and type

"http://<name_of_server>/<name_of_virtual_directory>/mobile/default.aspx"

as the website URL. For example, http://mycompany/mobile/default.aspx.

Whenever there is an update to **Mobile Synergy**, you can opt to update only **Mobile Synergy** instead of the complete **Exact Synergy Enterprise** application. For more information, see [How-to: Updating Mobile Synergy](#).

Note: For Nokia mobile phone users, you have to enable **Basic Authentication** on the IIS virtual directory in order for **Mobile Synergy** to function smoothly. To do this on Windows 7, go to **Administrative tools** in **Control Panel**, and then open the **Internet Information Services (IIS) Manager**. Next, double-click **Authentication**. Finally, right-click **Basic Authentication**, and then click **Enable**.