How to Use SalesJunction's iPhone App

Description: This document will show you how to set up and use SalesJunction.com's iPhone App.

SalesJunction's iPhone App gives you immediate access to real time information, including Accounts, Contacts, Opportunities, Activities, and Notes. You can also add and edit any of this information – all directly from your iPhone!

What to do first: After installing your SalesJunction App from the App store, you will need to enter your SJ account credentials. Just press the "gear" icon (see below) and then enter and save your:
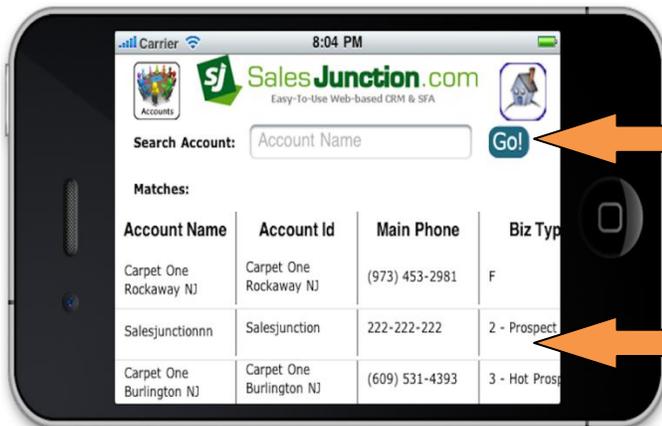
- Company ID
- UserID
- Password

(These are the exact same credentials you use to login to SalesJunction.com on your PC)

Press the "gears" tile to enter you SJ credentials. After entry, they will be saved for future use.

Now that you've set up your credentials, simply select the desired data you'd like to Review/Add/Edit. For example, if you press the "Accounts" tile above, the page below will appear on your iPhone. Enter all or part of the desired AccountID, and press "Go" to get a list of potential matches. Then just press the desired row/record to see the details! That's it! The rest of the system works the same way – search and find the desired record for viewing/editing – or add a new record by pressing the big green plus (+) icon!

Where ever you see a search box, just type in your criteria and press "Go" to generate a list of possible matches.

Once you generate a list, just select any record by pressing the desired row.

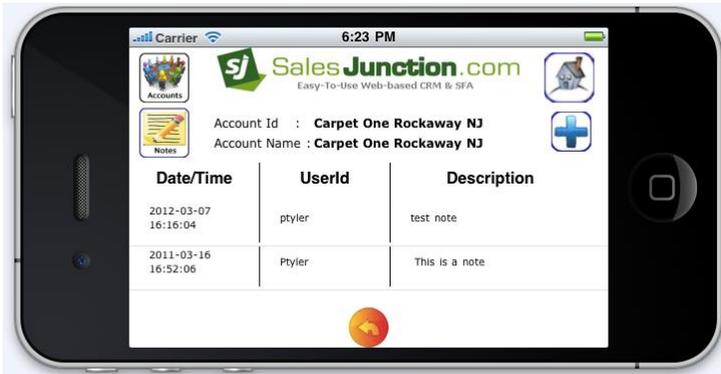Adding Records:

- Contact add example:

Throughout the App, to add a new record, just click on the "+" sign. After electing to add a record, a page similar to the below image will prompt you to select a record type to add.

Adding Associated Records: While in any record, for example the account "Carpet One Rockaway NJ" to view or add associated records such as contacts, opportunities, activities, or notes, just press the desired tile.

To edit a note, just press the desired note. To add a new note, click on the "+" sign.

Of course, you can always "pinch" to zoom, swipe to move, and all of the other great gestures possible with your iPhone!

Important One more thing – Users of the app must have a setting of "SysAdmin" for "Authority" in their User settings (Setup/Users & Accounts/Users – select and edit the desired user).

Enjoy!