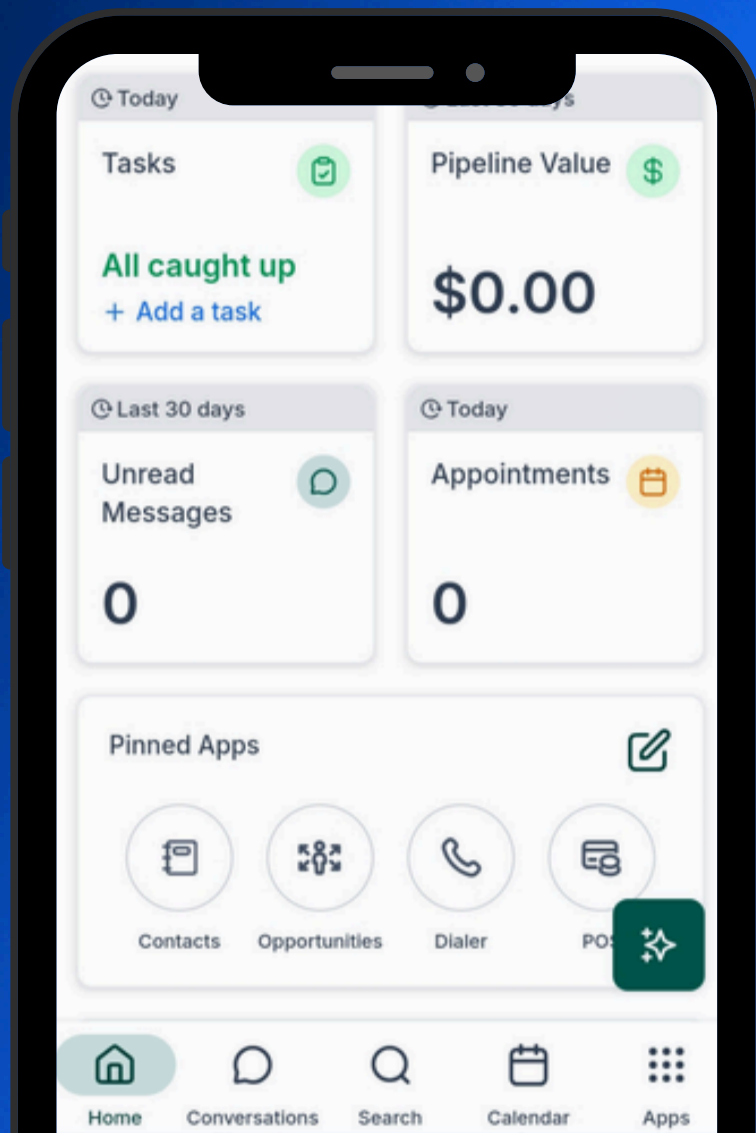


REFERENCE GUIDE

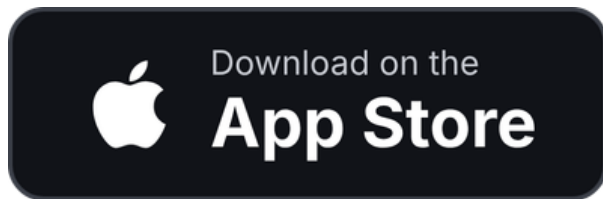
On-The-Go Mobile

Your software in your pocket

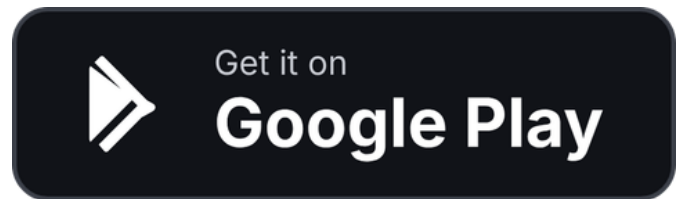


Get the App – Where to Go

Tap the badge for your phone to open its store page, then follow the four steps below. Reading this on a computer? Search for the app on your phone's store instead.



iPhone and iPad: opens the App Store



Android phones and tablets: opens Google Play

Getting In for the First Time

1

Download the app

Tap the badge for your phone, then tap Get or Install on the store page.

2

Log in with your desktop email and password

Use the same login you already use on desktop. Forgot it? Tap Forgot Password. Use Sign in with Google if you do on desktop.

3

Enter your security code

The first time, a code is sent by email or text. Enter it and you are in.

4

Switch accounts if you have more than one

Tap the dropdown arrow at the top of the screen. Most people have one account and will not see it.

Good to Know

- There is no separate mobile setup. Your desktop login works as is.
- Email or text both work for the security code. Pick whichever is easiest.
- Keep the app updated from your store for the latest features and fixes.

Home Screen and Pinned Apps

What It Is

Home is the first screen after login. Four cards, quick actions, and a revenue chart give you a fast picture of your day, and Pinned Apps put your top shortcuts one tap away.

How It Works For Your Business

- Home shows Tasks Due, Opportunity Pipeline Value, Unread Messages, and Today's Appointments at the top.
- Scroll down for a row of quick action buttons and a revenue chart.
- Tap the Edit icon next to Pinned Apps to choose up to four shortcuts.
- Drag the three-line icon to put your pinned apps in order.
- Turn on dark mode in your app settings for a black screen.

Home Screen and Pinned Apps – Tips & Guidelines

Tips

- Read the four cards each morning as a four-second check.
- Pin apps you use in the field, not once a month.
- Unread Messages is your reply debt. Zero means caught up.
- If Home looks different, an admin may need to turn on the new app experience: search for Labs.

DO

- Check the four cards daily
- Pin your four top apps
- Try dark mode at night
- Update the app when asked

DON'T

- Pin apps you rarely use
- Ignore Unread Messages
- Assume Home looks the same everywhere
- Skip notification prompts

App Drawer, Search and Alerts

What It Is

The App Drawer is a grid of every module sorted into four groups. Universal search and the Notifications icon help you find people and see what you missed.

How It Works For Your Business

- Tap the nine dots to open the App Drawer and see every app by category.
- Groups are Insights & Productivity, Communications, Sales & Operations, and Marketing & Growth.
- Universal search looks across Conversations, Contacts, and Opportunities at once.
- Search with just a small piece, like the last four digits of a phone number.
- The bell at the top right shows your notifications. Settings holds your profile, dark mode, and app version.

App Drawer, Search and Alerts – Tips & Guidelines

Tips

- Ask: is this about talking, selling, planning, or marketing? That picks the group.
- Search with just a piece of a name, number, or message.
- Clear Notifications each morning so new alerts are truly new.
- Modules you see can vary by account and app version.

DO

- Search instead of scrolling
- Learn the four groups
- Clear alerts each morning
- Use the drawer for the rest

DON'T

- Scroll more than twice
- Hunt through every icon
- Leave notifications off
- Expect identical modules for all

Replying to Conversations

What It Is

Conversations is your message inbox on the phone. You open a thread, pick a channel in the composer, send a reply, and use swipe actions for quick tasks.

How It Works For Your Business

- Tap Conversations to see your list, with the newest messages on top.
- Tap a row to open the thread and scroll up to read old messages.
- In the composer, look for the option that picks between SMS and Email.
- Type your reply and tap send. It appears in the thread right away.
- Swipe a conversation to the left to see quick action icons, including DND.

Replying to Conversations – Tips & Guidelines

Tips

- Read the whole thread before you answer.
- Use SMS for short answers and Email for links, prices, or details.
- Check the channel before you hit send.
- The channel picker label and swipe icons can vary by app version.

DO

- Read the full thread
- Check the channel first
- Keep replies short
- Learn the swipe actions

DON'T

- Reply to only the last line
- Send a price by text
- Write an essay on a phone
- Send without checking the channel

Contacts, Tasks and Notes

What It Is

Contacts shows your people as tiles. Press and hold for quick actions, open a contact for three tabs, and select many contacts to tag them in one step.

How It Works For Your Business

- Press and hold a tile for Call, SMS, Email, Book Appointment, and Collect Payment.
- Inside a contact, Details holds info, custom values, and a Do Not Disturb switch.
- Tasks & Notes stores your to-dos and notes on that contact.
- Activities is a timeline of calls, appointments, payments, and page visits.
- Use the three-dot menu, then Select, then Add Tags or Remove Tags.

Contacts, Tasks and Notes – Tips & Guidelines

Tips

- Add a note and a task right after a call.
- Check Activities before a call to avoid repeating questions.
- Tag whole groups after an event or a call day.
- Bulk tagging has limits, so keep your batches small.

DO

- Log notes right after calls
- Set task due dates
- Tag groups in batches
- Use long-press shortcuts

DON'T

- Skip the Activities tab
- Tag huge batches while learning
- Trust memory over notes
- Open every contact to call

Calendar and Appointments

What It Is

The Calendar module shows your appointments and lets you view several users, calendars, or groups together. Opening an appointment shows its details.

How It Works For Your Business

- Find Calendar in the bottom bar, or in the App Drawer if it is not there.
- Use the dropdown under the calendar to add users, calendars, or groups.
- Each added calendar shows in its own color so you can see whose is whose.
- Changing your view does not change anyone's actual calendar.
- Tap an appointment to open the appointment screen with its details and tabs.

Calendar and Appointments – Tips & Guidelines

Tips

- Add your whole team to one view before promising a time.
- A group is a saved bundle of calendars set up by your admin.
- Open an appointment the night before to prepare.
- Appointment menus and options depend on your app version and appointment type.

DO

- View the team together
- Use groups for speed
- Check details before leaving
- Return to today when lost

DON'T

- Promise a time unchecked
- Think views edit calendars
- Leave a crowded view as is
- Skip appointment details

Calls and Call Transfer

What It Is

The app can place and answer calls. During a call you can take notes, and for incoming calls you can transfer to a teammate, warm or blind.

How It Works For Your Business

- Tap Call from Conversations or Contacts to start an outbound call.
- The in-call screen offers notes, tasks, appointment, transfer, mute, and hold.
- After a call, a summary lets you finish notes, add tasks, apply tags, or call back.
- On an incoming call, tap Transfer at the top right.
- Pick a recipient from Staff List, Contacts, Dial Pad, or Recent Calls.

Calls and Call Transfer – Tips & Guidelines

Tips

- A warm transfer lets you speak to the person first. A blind transfer hands off at once.
- Finish your notes in the after-call summary while it is fresh.
- Button labels may vary by app version, so go by what you see.
- Check the participants panel to manage who is on the call.

DO

- Finish notes after a call
- Choose warm to introduce
- Use hold when needed
- Check the call participants

DON'T

- Forget to log the call
- Blind transfer by habit
- Skip the summary screen
- Mute and forget to unmute

Business Card Scanner

What It Is

The scanner turns a photo of a business card into a contact. You can scan the front and optionally the back, review the details, and save.

How It Works For Your Business

- Start from Contacts plus the add button, or the quick actions lightning button.
- Choose Scan Business Card and capture the front, and the back if you want.
- Add tags and edit any detail the scan got wrong.
- Use Refine with AI to clean up the scanned details.
- Save the contact and check it in the Contacts tab.

Business Card Scanner – Tips & Guidelines

Tips

- Scan in good light and hold the card flat.
- Add tags during the scan so you can find the group later.
- Always review the details before saving.
- Free scan limits may apply, so check the on-screen notice.

DO

- Scan in good light
- Tag as you scan
- Review before saving
- Check the Contacts tab after

DON'T

- Scan in a shadow
- Trust every scanned detail
- Skip tags
- Assume unlimited scans

Tap to Pay

What It Is

Tap to Pay lets you take a card or phone payment on your phone using Point of Sale. It needs a connected payment account and a supported device and region.

How It Works For Your Business

- Open Point of Sale and enter the amount.
- Add a +Note so the charge is easy to recognize later.
- Tap Charge, then choose a tip option or No tip.
- The customer taps their card or phone on the back of your phone.
- Watch for the Approved screen to confirm the payment.

Tap to Pay – Tips & Guidelines

Tips

- Set up your connected payment account before you need it.
- Supported devices and regions can change, so check the in-app help.
- Add a note to every charge for easy records.
- Tip options may vary, so check what appears.

DO

- Connect payments first
- Add a note to each charge
- Confirm the Approved screen
- Check device support

DON'T

- Test with a customer waiting
- Skip the note
- Assume every device works
- Hand over before approval

AI Replies, DND and Spam Tags

What It Is

AI Suggested Replies drafts an answer for you to send, edit, or dismiss. DND and spam tags help you stop unwanted calls and messages.

How It Works For Your Business

- An admin must set the assistant to Suggestive Mode on the web app first.
- In a conversation, a suggested reply appears for an incoming message.
- Choose Send, Edit (you can restore the original), or Dismiss.
- Tap Show AI suggestion to bring a dismissed reply back.
- Use DND on an incoming call, from Call Logs, or by swiping left on a conversation.

AI Replies, DND and Spam Tags – Tips & Guidelines

Tips

- Read every suggestion before you send it.
- Pick which channels DND blocks, such as calls or texts.
- Spam tags show for suspected spam callers on recent app versions.
- Supported channels for suggestions may change over time.

DO

- Review suggestions first
- Choose channels for DND
- Edit replies to sound like you
- Check your app version

DON'T

- Send without reading
- Block every channel by default
- Expect suggestions without setup
- Ignore spam warnings

Key Terms Glossary

Home

First screen after login with cards and quick actions

Pinned Apps

Up to four shortcuts to your favorite modules on Home

App Drawer

A grid of every module, sorted into four groups

Universal search

One search across Conversations, Contacts, and Opportunities

Composer

The message box where you type and pick SMS or Email

Thread

The full set of messages with one contact

Long-press

Press and hold a tile to open quick actions

Tag

A label that sorts contacts into groups

Warm transfer

You speak to the receiver before handing off a call

Blind transfer

You hand off the call without introducing it

Tap to Pay

Take a card payment by tapping on your phone

DND

Do Not Disturb, blocks channels you choose

Getting Help

The mobile app changes over time, and menus and labels can differ by app version and account. If something looks different, check the help or support area inside the app, and ask your admin whether a setting needs to be turned on.