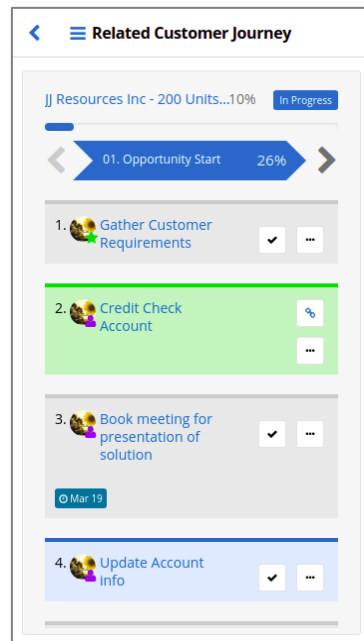


Customer Journey Mobile for iOS User Guide

Overview

The Customer Journey Mobile™ by Addoptify brings the capabilities of the popular Customer Journey Plug-in for Sugar to the Sugar Mobile app for iOS devices.



Using the Customer Journey Mobile app means one can not only see but assign, interact and use customer journeys as on the desktop. The Customer Journey Mobile app is based on and is an extension of the popular Sugar Mobile app. All capabilities of the Sugar Mobile app are available within the Customer Journey Mobile App. It is not necessary to install both.

This guide covers installing the Customer Journey Mobile app and highlights the Customer Journey capabilities of the app. Please refer to the Sugar Mobile app for iOS User guide for additional features and functionality.

Installing

Customer Journey Mobile is available for download from the Google Play store. Use the following steps to download and run the Sugar Mobile application on your iOS device:

1. Search for "Customer Journey Mobile for Sugar" in the Apple App store. If searching from an iPad, choose the "iPhone Apps" tab.
2. Select the "Customer Journey for Sugar" app by Addoptify.
3. Tap "Install" to install the Customer Journey Mobile application.

Logging In

In order to log in to your Sugar instance using Customer Journey Mobile, you will need the following pieces of information:

Username : The username you use to access your Sugar instance in a desktop browser.

Password : The password you use to access your Sugar instance in a desktop browser.

Sugar Instance or single sign-on URL: The URL of your Sugar instance.

Note: "http://" can be included or left off without effect but be careful to only include "www." if this is included when accessing your instance from a desktop browser.

Use secure connection: Whether or not your instance is accessed using HTTPS. If you access your instance using "http://", uncheck this box.

Single Sign-On: Whether or not your instance is configured to use legacy single sign-on authentication. If your instance uses SugarIdentity authentication, you do not need to enable Single Sign-On.

Standard Login

Use the following steps to log in to your instance:

1. Once the app is installed, tap the Customer Journey Icon to run the application.
2. Enter your Sugar instance URL. If your instance does not use SSL (i.e. you access it with http:// rather than https://), uncheck "Use secure connection". Tap "Continue".

Set up your Customer Journey instance

In order for the app to work, you will need to type in the URL of the Customer Journey instance. If you do not have the instance URL, please contact your administrator.

Instance URL
your-Customer Journey-instance.com

Use secure connection

Single Sign-On

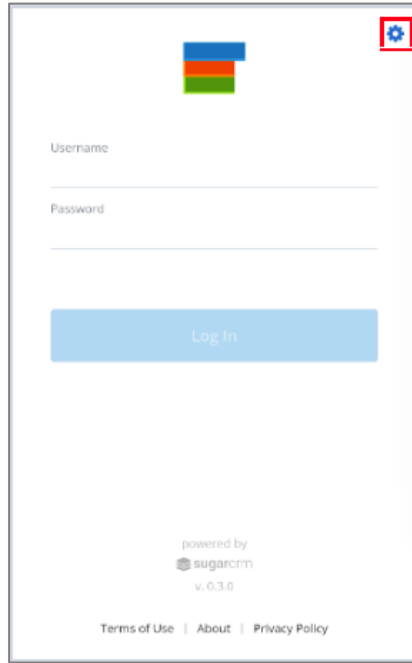
Continue

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Note: If you have previously used the Sugar Mobile app on your mobile device, you must tap the Gear icon in the top right corner to modify these settings.

3. Enter your username and password then tap "Log In".



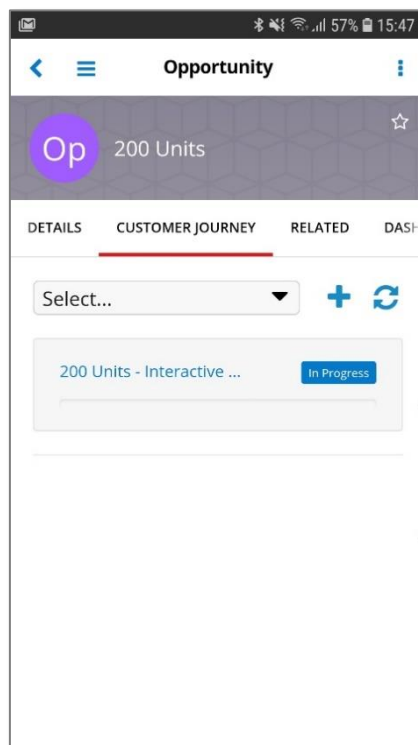
If your organization uses Legacy Single Sign-On Authentication or SugarIdentity then please follow the instructions in the Sugar Mobile app.

Customer Journeys in the app

A customer journey on the app is the same concept defined in the Customer Journey Plug-in for Sugar. Please refer to that documentation for a detailed description. Customer Journey templates are available to be associated with the different types of records as defined by your Sugar administrator.

There are currently two major usage scenarios for the Customer Journey App. The first is to visualize and/or complete activities on an existing customer journey associated with a record. The second is to associate a record with a new customer journey template so that the various stages and activities can be completed.

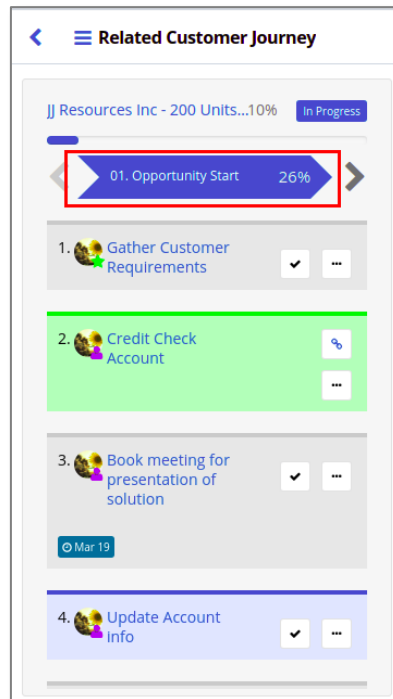
To demonstrate the capabilities, an existing opportunity that has a Customer Journey template associated with it is viewed.



By clicking on the customer journey tab, the actual Customer Journey and its progress status is shown. If there are multiple customer journeys associated with a record, then there will be a list of associated customer journeys. Clicking on a customer journey row will open the related customer journey.

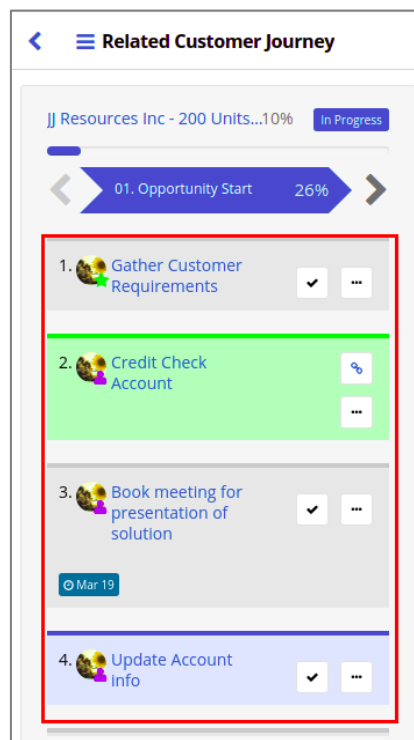
Customer Journey Stages

Highlighted in red is the customer journey stage. By using the arrows, you can move to other stages in the journey.

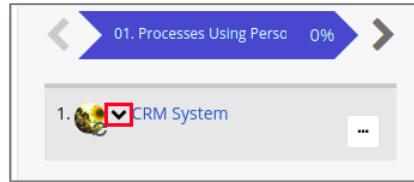


Customer Journey Activities

The activities associated with each stage are listed below each stage as highlighted here in red:



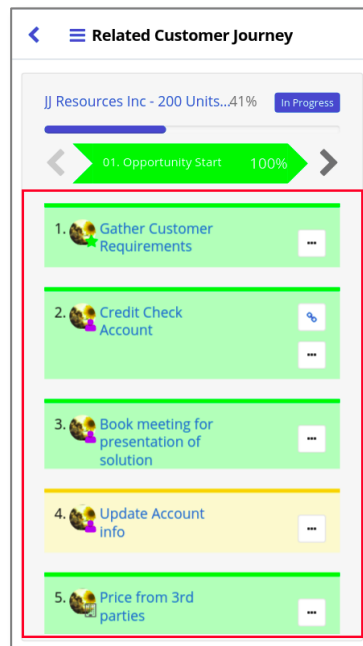
Activities in a journey may also contain one or more sub-activities. When sub-activities exist, you must expand the parent activity to access them. Simply click on the downward-facing arrow to the left of the activity's name to reveal its sub-activities:







Sub-activities will be slightly indented and display the default order number x.1, where x is the order number of the parent activity. For example, if an activity numbered 3 contains two sub-activities, the sub-activities will be numbered 3.1 and 3.2 by default.

Working with existing Customer Journeys

To move through a journey, simply progress through the stages by completing one activity at a time. The details of how to move through a journey by completing a task, activity or meeting are covered in the Customer Journey Plug-In for Sugar user documentation.



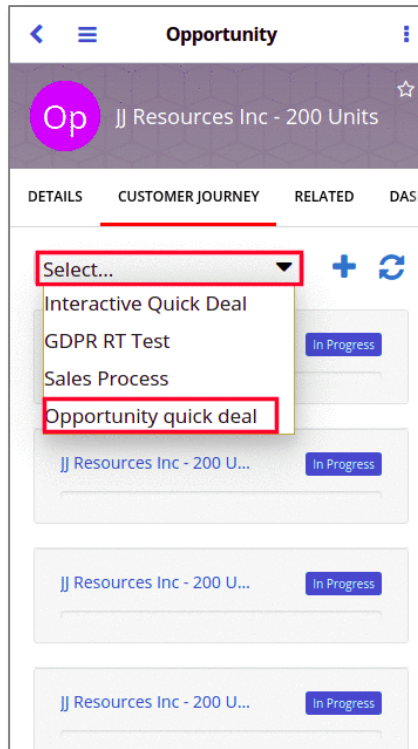
The Customer Journey Mobile relies on the same color scheme as the Plug-In to quickly communicate the status of stages and activities in a journey. The following chart explains the colors utilized by the Mobile:

Color	Example	Description
Gray		Scheduled (Not Started)
Blue		In Progress
Green		Completed
Yellow		Incomplete (or Not Applicable for activities)

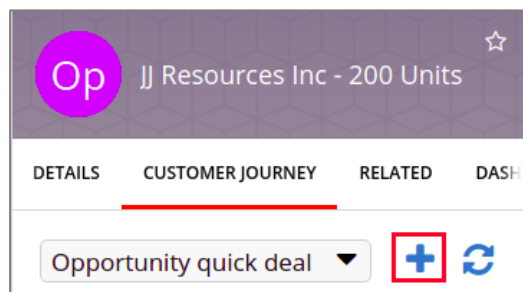
Starting a New Customer Journey

Customer journeys may be related to any combination of records in the modules configured by your administrator to work with the Customer Journey Plug In. From the app, an existing customer journey template can be associated with an appropriate existing record type. For this example, we will start a new journey for an existing opportunity.

1. Navigate to the record's detailed view (in our example, it is an opportunity) and locate the Customer Journey tab. The selector menu is on the top of the list view of Customer Journey. Click on the Select drop down to see the available journeys listed in alphabetical order:



2. Select the journey you want, and then click on the Start (+) icon to start that journey for the current record.



The selected customer journey is now associated with the record and can be viewed and updated.

Refreshing Customer Journey Templates

In order to get the latest list of CJ templates in the dropdown from server, click on the refresh button



Journey Menus

Customer Journeys give users options at three levels: journey actions, stage actions, and activity actions. The next three sections explain the available options for each level.

Journey Actions Menu

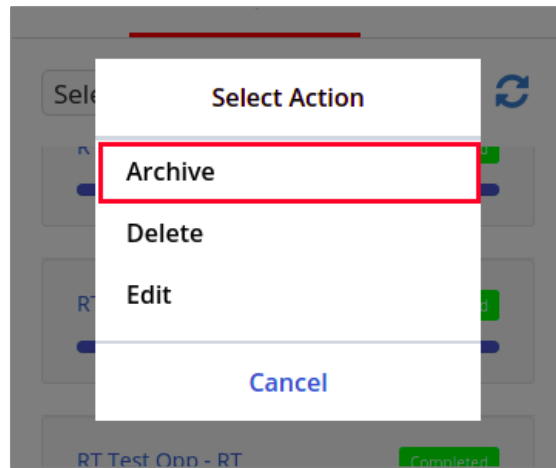
Long press on the journey in order to get the action menu. The Actions menu allows you to perform the following operations depending on the state of the journey. Not all options will be available:

Menu Item	Description
Archive	Shown for completed journeys only, "Archive" will hide the current journey from the Customer Journeys tab. The journey will no longer show in the customer journey tab but will remain visible in the Customer Journeys list view and remain reportable.
Cancel	Shown for in-progress or not started journeys only, "Cancel" will stop the current journey without deleting it. All activities will close to "Not Applicable". Journeys that have been completed cannot be canceled and will not have a "Cancel" option.
Delete	Stop the current journey and delete it and all of its related activities (tasks, calls, meetings) from Sugar.

Edit	Allow you to edit the Customer Journey
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Archiving Customer Journeys

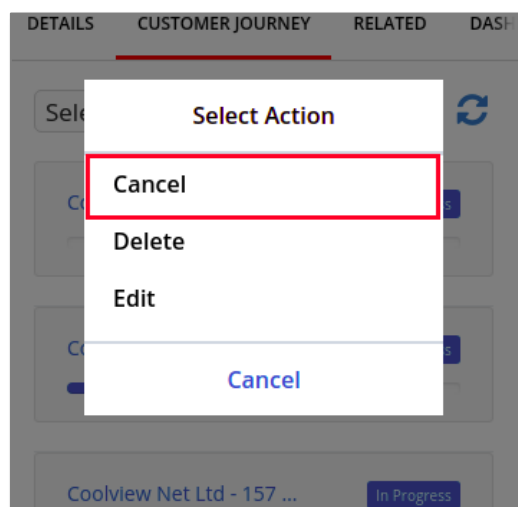
To hide a completed customer journey, simply select "Archive" in the journey's actions menu by pressing long or swipe left on the journey



Shown for completed journeys only, "Archive" will hide the current journey from the Customer Journeys tab. The journey will no longer show in the customer journey tab but will remain visible in the Customer Journeys list view and remain reportable.

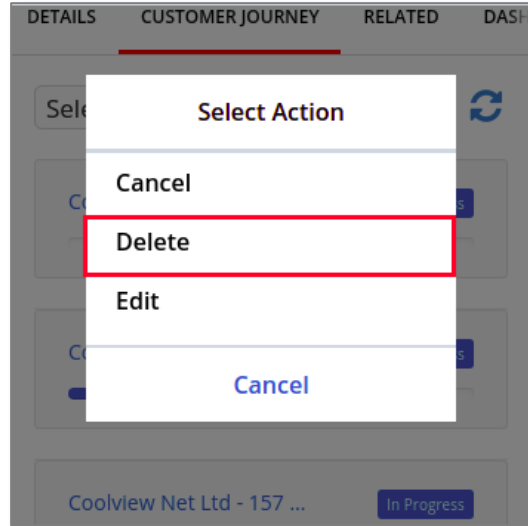
Canceling Customer Journeys

Shown for in-progress or not started journeys only, "Cancel" will stop the current journey without deleting it. All activities will close to "Not Applicable". Journeys that have been completed cannot be canceled and will not have a "Cancel" option.



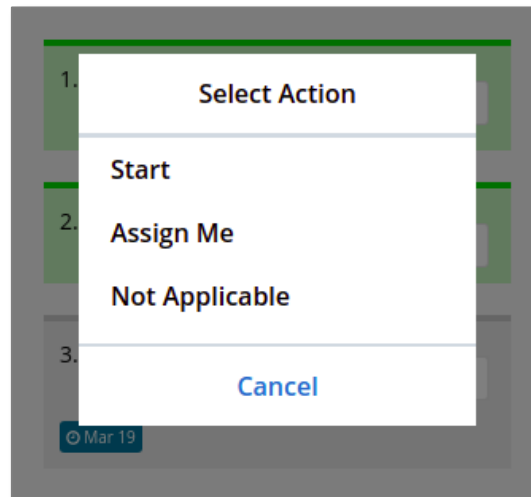
Deleting Customer Journeys

In the case that you mistakenly start a customer journey, simply select "Delete" in the journey's actions menu by pressing long or swipe left on the customer journey record



Please note that the call, meeting, and task records that were created by the journey will also be deleted from Sugar when you remove a customer journey via the Delete option.

Activity Actions Menu



The Actions menu allows you to perform the following operations:

Menu Item	Description
Complete	Close the current activity as "Completed".
Start	Set the call, meeting, or task by changing its status to "In Progress".
Not Applicable	Close the activity as "Not Applicable".
Assign Me	Re-assign the activity to yourself. This option is unavailable when the activity is already assigned to you.

Please note that the available options in the activity Actions menu may vary based on the configuration of the journey by your administrator.

Feature compatibility with the Customer Journey Plug In

The Customer Journey Mobile for iOS app is currently designed to be an extension of the Customer Journey Plug-in. The current key functionalities relate to:

- Assigning an existing journey to a record as well as managing that journey (archive, delete, etc.)
- Viewing journey stages and journey tasks as well as their current status
- Completing tasks within a journey

Other capabilities of the Customer Journey Plug In such as creating new customer journey templates as well as adding, deleting and editing stages and tasks for a customer journey should be done from the Customer Journey Plug In.

Activity Type not available

If an activity used in a journey created for the Customer Journey Plug In is not available on the app and that activity is selected for action, the following error message will appear:

