

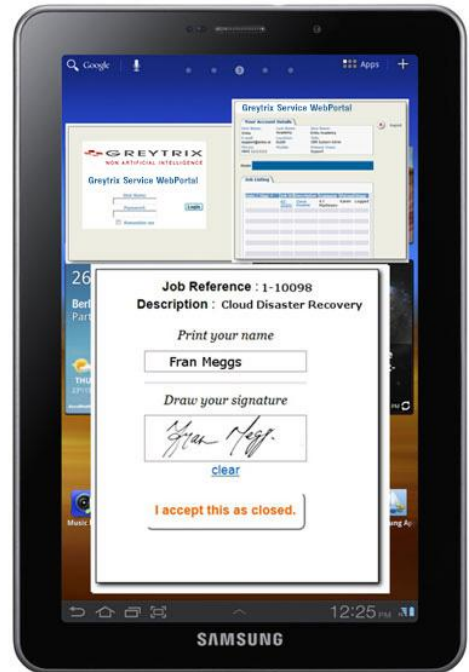
## Sage CRM Mobile Service Signature

### Remote Access, Update & Sign-Off of Job Sheets

Greytrix has unrivalled, direct practical knowledge and experience with the Sage CRM system over many years.

**Sage CRM Mobile Service Signature** enables Consultants to get approval and actual Client sign off of a Job, while still on the Client site. The Client can see the details of the Job listing on the Consultants mobile device and sign off the job sheet, on the touchscreen, there and then.

Seamlessly integrated with Sage CRM, the Job Sheet is then automatically saved to the client file in CRM, along with the attached client signature. Mobile Service Signature is compatible with Android Tablets and Phones and the iPhone/iPad.



Screen Shot - Job Sign Off.

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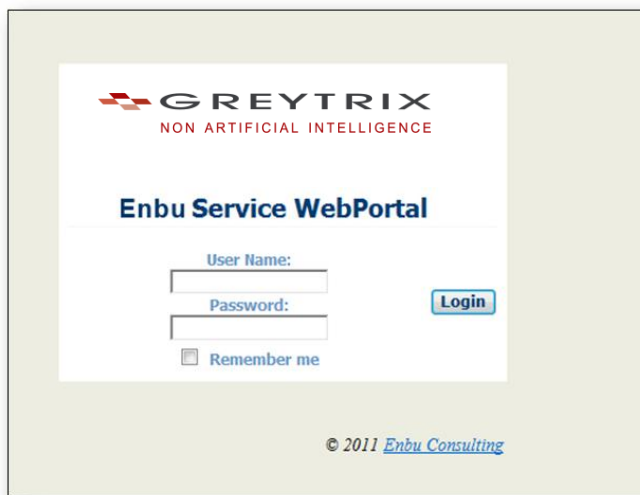
**Job Sign Off Sheet**

<b>Job Reference Id</b>	1-10098
<b>Job Description</b>	Cloud Disaster Recovery
<b>Case Problem Details</b>	Issue with on-site equipment
<b>Job Solution Details</b>	Fixed
<b>Engineer</b>	System Administrator
<b>Signee</b>	Fran
<b>Signature</b>	

## Job Details

In order to access details of a Job remotely, each Consultant logs into a Web Portal using their own secure login & password. The Portal contains the listing of all Jobs assigned to that Consultant. They can click through to the Job detail on each Job, where they will have an option to edit and / or add to the detail – including ‘Closure Comments’.

Screenshots – Consultant Login & Job Listing.

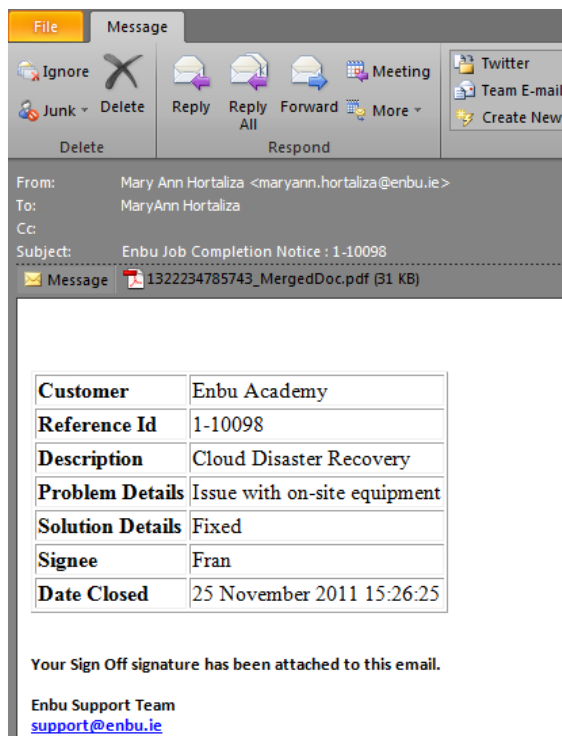


**\*\* Note:** Sage CRM Self Service license is required to run the Web Portal feature  
Screenshot – E-mail to Client.

## Email Confirmation

Once the Client has signed off the work, on the mobile device, an email can be sent to the Client, based on their email details within CRM. The email will include a PDF of the signed-off Job Sheet, containing details captured and the Clients own signature.

The email confirmation is the clear record of the Client’s approval and the recording of their signing off on the Job done. This email will also be included as a Communication in CRM, attached to the Client and Job record.



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