

## INFOtrac CRM Remote

**INFOtrac CRM Remote** provides users the option of having a full CRM package away from the office without any Internet or other type of connectivity. INFOtrac CRM Remote is a stand-alone installation of your company's full INFOtrac CRM system on any Windows based computer, notebook or tablet computer. Remote users get full access to their INFOtrac CRM system and then when their computing device attaches to the Internet, INFOtrac CRM Remote will automatically synchronize all changes that were made both on the remote computer and the head office INFOtrac CRM module.

Having independence from the Internet can be a welcome feature for users that cannot connect to the Internet while on the road or require expensive cellular connections. In addition, the ability to have the complete INFOtrac CRM application on the device is a strong benefit for users that are involved with deeper data and functions that are not well suited for mobile devices with their limited screen real estate and processing power.

Remote users that use this format of INFOtrac CRM Remote rely on the synchronization processes to update their local INFOtrac CRM data as often as they connect their device to the Internet.

### Typical users for INFOtrac CRM Remote are:

- Sales people that need to access their customer information in its entirety and prepare quotations and or orders for customers remote from the main office. This is particularly useful for customized or very detailed quotation processes
- Service people that have a service application built into their INFOtrac CRM environment that need to record details while on site at a customer location
- Customer support people that are required on-site and collect information from their customers
- Anyone that needs to use INFOtrac CRM where their company computing environment does not offer remote access computing

### How it Works

INFOtrac CRM Remote is installed on the remote computer with our synchronization engine installed on the host server in the company's office and on the remote computer. The user uses INFOtrac CRM as usual on their local computer, regardless of their ability to connect to the Internet with either a wired connection or Wi-Fi. Once the computer is connected to the Internet, CRM Remote checks to see if there are any changes on the local computer that have been made since the last synchronization. If there are, these changes are prepared to be sent to the "host" server in the company's office. At the same time, the connection is detected on the server and all changes made by all the companies users since the last synchronization are then sent to the INFOtrac CRM Remote installation.

All of this takes place in the background with no need for the user to do anything or even know that these updates are being performed by the system. All of this connectivity and data transmission is fully encrypted and secured through proper private tunneling technology to ensure all data is safe secure and protected.

### Remote Computer Requirements

The remote computer can be any desktop, notebook or tablet computer that is running Windows. Many of our customers are using Microsoft Surface computers for full computing and touch screen capabilities. On the other end, low cost notebook or tablet computers running Windows are also widely used with great success.

### Frequently Asked Questions

#### Why would a customer use INFOtrac CRM Remote?

- If remote users need to use INFOtrac CRM but they don't have remote access to their office
- If INFOtrac CRM has customized functions that remote users need for quotations or other unique applications that have been built into INFOtrac CRM while they are out of the office
- If remote users are in remote locations that don't have cellular coverage or the cost of cellular coverage is prohibitive

**What do users have to do to perform synchronization?**

INFOtrac CRM Remote performs the synchronization automatically behind the scenes so the user does not have to do anything and may not even know the synchronization is taking place.

**Does the remote user need fast Internet to synchronize?**

No, any Internet connection will work as the synchronization data is usually very small and it is compressed before it is communicated

**Does the remote user get all the data in the system?**

Remote users can be configured to only have their customers and or prospects or all the information in the INFOtrac CRM system. Whichever is chosen, all the data for these customers and prospects will be synchronized to the remote computer.

**What if we have customized INFOtrac CRM for our needs, does the remote user get these customizations?**

Yes, one of the strengths of INFOtrac CRM Remote is that all the customizations that are implemented are provided to these remote users without any additional work. All data involved with these customizations is synchronized so the remote user does not miss out on anything they have the rights to access.

**What about inventory levels, are they live in the system?**

The remote computer will have the inventory levels as of the date and time of their last synchronization. If there are orders placed or inventory received after this, inventory levels will change at the office. Once the next synchronization takes place, the inventory items will be updated. If a remote user is with a customer and needs up to the minute inventory levels, they can synchronize if they connect to the customers Wi-Fi or tether their cell phone to their computer.

**How many users can work remotely and synchronize?**

There is no limit to the number of users that can synchronize their INFOtrac CRM Remote. From 1 to 1000 or more users, the system supports as many users as required.

**How long does it take for the synchronization to take place?**

Depending on the Internet connection, typical synchronizations take from mere seconds to a few minutes to be performed. If there is a vast amount of updated data due to either a long period of time since the last synchronization or a vast amount of data input or changes in the host office system, it could take an extra few minutes. Overall, this process is very fast and efficient.

**Is INFOtrac CRM Remote a mobile solution that I can run on my smartphone or tablet?**

INFOtrac CRM Remote is designed for Windows based computers and does not run on Apple IOS or Android devices. This being said, there are many Windows based mobile devices such as small notebook computers and devices like the Microsoft Surface that are both full computers and mobile devices.

**Do I need to have the network version of INFOtrac CRM installed at my headquarters site for INFOtrac CRM Remote to work?**

Yes, INFOtrac CRM must be installed in order for the remote data to synchronize.

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