Salesforce.com: Winter '11

Salesforce Mobile User Guide for iPhone

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Chapter 1

What is Salesforce Mobile?

Salesforce Mobile gives you mobile access to your Salesforce.com data, tasks and calendar, and integrates the data with your mail and phone. With Salesforce Mobile installed on your iPhone®, you can stay connected to your data when you are not sitting at your desk and even when your device is not connected to a Wi-Fi network.

Salesforce Mobile downloads relevant data for standard Salesforce.com objects—such as accounts, contacts, opportunities, tasks, events, and leads—and for custom objects. You can view, edit, and delete the records stored on your device, or create new records. You can also search online for specific Salesforce.com records and add them to your device.

Your Salesforce Mobile data is defined by a mobile configuration created by your administrator. He or she identifies which objects, records, and specific fields are relevant to your daily work needs. This allows a subset of all your Salesforce.com data to be delivered to your device. Remember, you can also search for and retrieve individual records that are not automatically downloaded to your device.

What is Mobile Lite?

Mobile Lite is a free, restricted version of Salesforce Mobile that is available to any Salesforce.com user who doesn't have a mobile license. Mobile Lite doesn't include all of the features offered in Salesforce Mobile, which is the full version of the mobile client application.

With Mobile Lite, you can view, create, edit, and delete accounts, assets, contacts, leads, opportunities, events, tasks, cases, and solutions. You also have access to your dashboards and Salesforce Chatter feeds.

In Mobile Lite, the only records that automatically synchronize to your device are items you recently accessed in Salesforce.com. However, you can search for and download records that are not automatically delivered to your device. Items you download from Salesforce.com become a permanent part of your mobile data set. In addition to recently accessed records, the default configuration synchronizes activities closed in the past five days and open activities due in the next 30 days.

Note: Assets are not available as a tab in the mobile application. Assets display as a related list for accounts, cases, and contacts.

See Also:

What is Salesforce Mobile?
About this Guide

About this Guide

The *Salesforce Mobile User Guide for iPhone* is a reference for Salesforce.com users who want to access their data from an iPhone or iPod touch. Before reading this guide, you should already be familiar with your device. You need to know how to use the touch screen and onscreen keyboard, scroll through lists, back up to previous lists, and surf the Web.

This guide includes the following information:

Chapter	Description
What is Salesforce Mobile?	Salesforce Mobile introduction, requirements, and additional resources.
Getting Started	The installation process, accessing the application, navigating, displaying data, and selecting views.
Working with Records	How to work with records on the mobile device, including managing records, viewing related items, searching, and using iPhone features with Salesforce Mobile.
Working with Dashboards	Instructions for displaying and refreshing mobile dashboards.
Managing the Application	How to customize your settings, view connection information, refresh your Salesforce.com data, and upgrade the application.

See Also:

What is Salesforce Mobile?
What is Mobile Lite?
Salesforce Mobile Requirements

Salesforce Mobile Requirements

Salesforce Mobile is a client application you download and run on the iPhone or iPod touch. The requirements for this product are:

- **Salesforce.com Requirements:** You must have an active Salesforce.com account with a mobile license to access the mobile application on your iPhone or iPod touch. If you aren't already a customer, visit the Salesforce.com website to sign up for a free trial. If you are not sure whether you have a Salesforce.com account, contact your organization's system administrator.
- **iPhone Requirements**: The mobile application requires the latest iPhone operating system available on iTunes. If the App Store icon is available on the home screen, you can use the mobile application on your device. Be sure your device has at least 10 MB of available memory before installing the mobile client application.

- **Wireless Requirements**: The mobile application relies on a cellular or Wi-Fi network to communicate with Salesforce.com; however, you can continue working on your local data even when you lose connectivity to the Internet.

See Also:

What is Salesforce Mobile?
About this Guide
Additional Resources

Additional Resources

Refer to the following documentation for additional information:

- Apple Guides: Visit the Apple website to find out more about your iPhone.
- Salesforce Mobile Implementation Guide: Salesforce.com administrators should consult this valuable reference tool. It describes how to successfully implement Salesforce Mobile and deploy the mobile solution to wireless users.

See Also:

What is Salesforce Mobile?
Salesforce Mobile Requirements
iPhone Disclaimer

iPhone Disclaimer

Use of the Salesforce Mobile for iPhone product is subject to certain limitations:

- Third parties (including, but not limited to, Apple Inc. and your network connectivity provider) may at any time restrict, interrupt or prevent use of Salesforce Mobile for the iPhone and iPod touch devices, or delete the Salesforce Mobile software from iPhone or iPod touch devices, or require salesforce.com to do any of the foregoing, without entitling the customer to any refund, credit or other compensation from such third party or salesforce.com.
- Service level agreements do not apply to the Salesforce Mobile for iPhone product. Additional limitations are described in the Order Form Supplement for Salesforce Mobile for iPhone, which users are required to accept upon download or installation of the Salesforce Mobile for iPhone product.

See Also:

What is Salesforce Mobile?
Additional Resources

Chapter 2

Getting Started

To get started with Salesforce Mobile, you first need to download the application from Apple's App Store. Then you can activate your Salesforce.com account on your iPhone or iPod touch and begin using the mobile application. Before you start working with Salesforce.com on your device, you should understand how to navigate around Salesforce Mobile.

Installing Salesforce Mobile

Salesforce Mobile is available for download from Apple's App Store. To use the App Store, your iPhone or iPod touch must be connected to the Internet. You also need an iTunes™ Store account to download applications. If you do not already have an iTunes Store account, open iTunes on your computer and select **Store ➤ Account** to set one up.

To download Salesforce Mobile from the App Store:

1. From the Home screen of your iPhone or iPod touch, tap the App Store icon.
2. Tap **Search**.
3. Tap the `Search` field to open the keyboard. Type `salesforce`.
4. Tap Salesforce Mobile in the list of search results.
5. Tap Salesforce Mobile to view information about the application.
6. Tap **Free**, and then tap **Install**.

   Note: It does not cost money to download the application from the App Store. Enterprise, Professional, Unlimited, and Developer Edition users with mobile licenses can run Salesforce Mobile, the full version of the mobile application. Users without a mobile license can run Mobile Lite, the free, restricted version of the mobile application.

7. Enter your iTunes Store account and password and tap **OK**.

   After you begin downloading the mobile application, its icon appears on your Home screen and shows the status of the download and installation.

8. The first time you launch the mobile application on your device, you must activate your Salesforce.com account by logging in and downloading data. Verify that your phone is connected to a network. For greater performance and reliability, use a Wi-Fi network instead of a cellular network when activating the mobile application.
9. Tap the Salesforce.com icon on the Home screen.
10. Tap **I Accept**.
11. On the activation screen, enter your Salesforce.com username and password. Tap **Done** to close the keyboard.
12. Tap **Activate**.

    Caution: Do not close the window or let the device lock. If the application closes, the iPhone operating system stops the application from running, which causes the activation to fail.

13. The application opens after Salesforce.com accepts your username and password and downloads your records.

Depending on your organization's setup, you might need to set up a passcode before accessing the application.

See Also:

Getting Started
Setting Your Passcode

Setting Your Passcode

For security, your Salesforce Mobile session times out after ten minutes of inactivity. You must use a five-digit passcode — which is different than your Salesforce.com password — to access the mobile application after it locks. You are prompted to set up this passcode when you log in to Salesforce Mobile for the first time.

Note: The default timeout value is ten minutes. Your administrator can change the timeout value to a different time interval or remove it so that the application never locks.

To set up your passcode:

1. Install Salesforce Mobile.

   After your Salesforce.com records download to your device, you are prompted to create your passcode.
2. Enter your five-digit passcode.
3. Enter your passcode again for confirmation.

Notes about Passcodes

- Your passcode never expires; however, if you or your administrator choose to erase the Salesforce.com data on your device, you will be prompted to create a new passcode after re-activating your Salesforce Mobile account.
- In cases where you incorrectly type your passcode, you have ten attempts to enter the correct passcode before you are prompted to change it.
- There is no way to reset your passcode. If you forget it, enter an incorrect passcode ten times until you fail the passcode attempts, then reactivate your account and create a new passcode.
- You can log out of the application by navigating to the App Info screen and tapping **Log Out**.

See Also:

Getting Started
Installing Salesforce Mobile
Your Mobile Data

Your Mobile Data

Running Salesforce.com on a phone is much different than using the application on your computer. Wireless devices have a minimal amount of memory, a small screen, and do not maintain a constant network connection. To work with these limitations, a subset of your Salesforce.com data is stored in a local database on your phone. This ensures you have access to your most important records and lets you work offline when no network connection is available. Your Salesforce.com administrator defines which tabs, objects, and records are available to you in Salesforce Mobile.

Note: With Mobile Lite, your data set is not defined by your administrator. Instead, you have access to a few standard objects, and the only records that automatically synchronize to your device are ones that you have recently accessed in Salesforce.com.

See Also:

Getting Started
Setting Your Passcode
Navigating
Mobile Tabs
Mobile Objects
Mobile Records

Mobile Tabs

The following types of tabs are available in the mobile application:

- Standard and custom object tabs
- Dashboard tab
- Web and Visualforce tabs

By default, object tabs in the mobile application reflect the Salesforce.com website—if an object's tab is hidden on the website, it is hidden in the mobile application. However, if the tab is exposed in at least one Salesforce.com application that is available to you on the website, then the tab is available to you in the mobile application. Your administrator has the ability to override the default tab configuration and customize your mobile tab display.

Your administrator must enable dashboards, Visualforce tabs, and web tabs for the mobile application. If you cannot access tabs in Salesforce Mobile that you frequently use on the Salesforce.com website, contact your Salesforce.com administrator.

See Also:

Your Mobile Data

Mobile Objects

Your mobile configuration determines which objects are available to you in Salesforce Mobile. The mobile application supports all custom objects and the following standard objects:

- Accounts
- Assets
- Cases
- Chatter
- Contacts
- Content
- Events
- Leads
- Notes
- Opportunities
- Price Books
- Products
- Solutions

- Tasks

Note:

- Chatter Mobile is currently available through a pilot program. For information on enabling Chatter Mobile for your organization, contact salesforce.com.
- Products and price books are not available in Mobile Lite, which is the free version of Salesforce Mobile.

See Also:

Your Mobile Data

Mobile Records

It is likely that you do not see all of your Salesforce.com records in Salesforce Mobile. For each mobilized object, your administrator can create filter criteria to limit the amount of records on your device. For example, in a large organization, sending all open and closed opportunities to your iPhone could consume too much memory or potentially crash the device. Instead of sending all opportunities, your administrator might send only your open opportunities that are scheduled to close this month. Keep in mind that you can always search for the records that are not automatically downloaded to your device.

Periodically, your device synchronizes with Salesforce.com to download new and updated records.

See Also:

Your Mobile Data

Navigating

If you're familiar with other iPhone applications, you'll find it easy to navigate in Salesforce Mobile. Here are guidelines for getting around in the application:

- Tap the Salesforce.com icon to open the mobile application. Tap the Home button at any time to hide it and return to the Home screen. The application remembers the last page you visited and returns to that page the next time you open Salesforce Mobile.
- Generally, most Salesforce Mobile pages contain lists of information. To scroll through lists, drag up and down. Flick to scroll quickly.
- List views in Salesforce Mobile have an index along the right side. Tap a letter to jump to items starting with that letter. Drag your finger along the index to scroll quickly through the list.
- Tap an item in the list to choose it. Depending on the list, tapping an item can do different things—for example, it may open a new list or show the details of a Salesforce.com record.
- Some lists have standard and custom views. You can change the view to display a different list of records.
- The back button in the upper-left corner shows the name of the previous list. Tap it to go back.
- To log out of the application, go to the App Info screen and tap **Log Out**.

See Also:

Getting Started
Your Mobile Data
Displaying Data

Displaying Data

The tabs along the bottom edge of the mobile application's window allow you to access data in the application. When you open the application for the first time, the tab bar contains five tabs—three default tabs and two object tabs. The default tabs that appear in the tab bar are:

- **Recents:** Displays items you recently accessed in the mobile application.
- **Search:** Lets you search for records in the mobile application across all object types.
- **More:** Displays a list of all mobilized objects so you can select objects that are not on the tab bar. You can define what appears on the tab bar.

Selecting an object's tab displays a list of records for that object, which is called the list view. Keep in mind that the list view displays records stored locally on your device, not necessarily all of the object records available to you in Salesforce.com.

In an object's list view:

- The header displays the object's name, and the sub-header displays the name of the current list view.
- You can change the view to display a different list of records.

See Also:

Getting Started
Navigating
Displaying Visualforce and Web Tabs

Displaying Visualforce and Web Tabs

Not all tabs in Salesforce Mobile are object tabs. Visualforce tabs and web tabs are also available if they were mobilized by your Salesforce.com administrator.

A web tab displays a website. A Visualforce tab displays a page that was developed using Visualforce. Visualforce uses a tag-based markup language, providing a powerful way to build applications and customize the Salesforce.com user interface.

In Salesforce Mobile, selecting a Visualforce tab or web tab launches a web browser that is embedded in the application. While the mobile client application lets you work with your object data offline, viewing websites and Visualforce pages requires a network connection.

- Select the Visualforce tab or web tab to display the page. How quickly the page loads depends on the strength of your wireless signal and the size of the page. Contact your administrator if the mobile browser does not properly display the page or if important features on the page are not supported.
- To return to the originating URL of a Visualforce tab or web tab, tap **Tab Home** on the toolbar.
- To reload the current page, tap **Refresh** on the toolbar.
- To return to the previous page, tap **Back** on the toolbar.
- To go forward one page, tap **Forward** on the toolbar.

- To stop a page from loading, tap **Stop** on the toolbar.

See Also:

Getting Started
Displaying Data
Customizing Tabs

Customizing Tabs

In Salesforce Mobile, the tab bar contains five tabs. The location of the More tab is permanent, but you can customize the other four tabs. To define the tabs on your tab bar:

1. Tap **More**, and then tap **Edit**. The Configure screen displays all available icons in the application.
2. Drag and drop an available icon onto the tab bar to replace the current icon. You can arrange the icons on the tab bar by dragging them horizontally to the desired location.
3. Tap **Done** to save the arrangement.

See Also:

Getting Started
Displaying Visualforce and Web Tabs
Selecting Views

Selecting Views

Some standard and custom views are available in the mobile client application. For each mobilized object, you can select any mobile custom views that your administrator set up in Salesforce.com and pushed to your device. You can also view a list of all the records on your phone, or just the records you own. The following objects have additional standard views:

- **Cases:** My Open Cases
- **Events:** My Delegated Events, My Events: Today
- **Leads:** My Open Leads

  Tip: Unread leads have a blue dot next to them.

- **Tasks:** My Open Tasks, My Team's Tasks, My Delegated Tasks
- **Opportunities:** My Open Opportunities, Closing This Month, Closing Next Month

To change the view:

1. Select an object to open its list view.
2. Tap the name of the current view to open a list of available views for that object. For example, tap **My Accounts** to open a list of standard and custom views for accounts.
3. Tap the name of a view to select it.

   The application remembers the view you chose and displays it the next time you select that object.

Tip: Standard views are also available in related lists.

See Also:

Getting Started
Customizing Tabs
Using Your Calendar

Using Your Calendar

The calendar is available from the Events tab. You can view your events in a calendar format or in a list. To change the view, tap **Calendar** or **List** at the top of the Events page. The calendar view displays events one day at a time.

To navigate the calendar:

- Tap the **Next Month** icon to jump ahead one month. Tap the **Previous Month** icon to go back one month.
- Tap the **Next Week** icon to jump ahead one week. Tap the **Previous Week** icon to go back one week. You can also swipe the dates left or right to change the week.
- Days with events show a dot below the date. Tap a date to view that day's events.
- Tap **Today** to see today's events.
- For each event, you can see the subject, start time, end time, and the name of the record to which the event is related.
- To view an event's details, tap the event.

With the required permissions, you can also create, edit, and delete events.

See Also:

Getting Started
Selecting Views

Chapter 3

Working with Records

With Salesforce Mobile, you can view, edit, and delete the Salesforce.com records stored on your device and create new records. An online search feature is available for finding records not stored in your local data set. Because Salesforce Mobile is integrated with several of the native applications on your phone, you can even place calls, send emails, and map addresses from your Salesforce.com records.

In addition to being able to work with object records, you can also display web tabs and Visualforce tabs that have been mobilized by your administrator.

Managing Records

In the mobile application, objects are represented by tabs along the bottom of the screen. Selecting an object's tab displays a list of all mobilized records for the object. For example, tapping the Accounts tab opens a list of accounts. You can perform many different actions on records in the list view.

See Also:

Working with Records
Searching
Viewing Records
Viewing Related Items
Editing Records
Creating Records
Deleting Records
Reassigning Records
Cloning Records
Using Notes
Converting Leads
Choosing a Price Book for an Opportunity

Viewing Records

To view a record:

1. Select an object to open the list view.
2. Tap the record name.

When you open a record, a toolbar appears at the top of the detail page. The toolbar displays a set of actions you can take on the current record. If more than three actions are available for the current record, flick to scroll the toolbar to the left to reveal additional actions.

Note: The toolbar is not available if you have read-only access to the selected record.

See Also:

Managing Records

Viewing Related Items

To view a record's related items:

1. Select an object to open the list view.
2. Tap the record name.
3. Scroll to the bottom of the page and tap one of the related lists.

   The mobile application gives you access to a subset of your Salesforce.com records, so it's possible that the related item you want to view doesn't appear in the related list. Tap **Search server for more...** to search online for additional related items. In the Search Results view, tap a record to open it. After opening the record, it's automatically downloaded to your device.

   After searching for records on a related list, the Search Results view is active. Tap the name of the Search Results view to open a list and select a different view.

See Also:

Managing Records

Editing Records

To edit a record:

1. Select an object to open the list view.
2. Tap the record name.
3. Tap **Edit**.
4. Tap the field you want to edit. Change the value, then tap **Done** to return to the record.

   If you do not have permission to edit a field, it is hidden from the layout of the edit page.
5. Tap **Save** when done.

See Also:

Managing Records

Creating Records

To create a record:

1. Select an object to open the list view, then tap **+**.

2. Enter the information in the record. Tap a field to type or select the value, then tap **Done** to return to the list of fields.
3. Tap **Save**.

See Also:

Managing Records

Deleting Records

To delete a record:

1. Select an object to open the list view.
2. Tap the record name.
3. Tap **Delete** on the toolbar.
4. Tap **Delete** again to confirm.

Caution: Deleting a record in the mobile application also deletes the record in Salesforce.com.

See Also:

Managing Records

Reassigning Records

To change the record owner:

1. Select an object to open the list view.
2. Tap the record name.

   You can only reassign records that contain a `Record Owner` field.
3. Tap **Change Owner** on the toolbar. You might need to scroll the toolbar in order to see the button. Flick your finger to the left to reveal additional toolbar buttons.
4. Tap the name of the user to whom you want to assign the record.
5. Tap **Save**.

   If you do not have permission to reassign the record, your changes will be rejected by Salesforce.com after the record is saved.

See Also:

Managing Records

Cloning Records

The **Clone** button quickly creates a new record with the same information as the existing record. To clone a record:

1. Select an object to open the list view.
2. Tap the record name.
3. Tap **Clone** on the toolbar.
4. Tap a field you want to edit. Change the value, then tap **Done** to return to the record.

If you do not have permission to edit a field, it is hidden from the layout of the edit page.

5. Tap **Save**.

See Also:

Managing Records

Using Notes

You can create, view, and edit notes from the Notes related list for certain types of records, such as accounts, contacts, leads, opportunities, and products.

- To access the Notes related list, open a record, scroll to the bottom of the detail page, then tap **Notes** in the Related Lists section.
- To view the contents of a note, tap the name of the note.
- To create a note, open the Notes related list, then tap **+**. Specify a description of the note and its contents, then tap **Save**.
- To edit a note, open it, then tap **Edit**. Make the changes you want, then tap **Save**.
- To delete a note, open it, tap **Delete**, then tap **Delete** again to confirm.
- To clone a note, open it, then tap **Clone**. Make the changes you want, then tap **Save**.
- To reassign a note, open it, then tap **Change Owner**. Select another user, then tap **Save**.

Note: Notes are only available as a related list on your device if your Salesforce.com administrator added them to your mobile configuration. If you don't see notes in the mobile application and you normally access them online in Salesforce.com, contact your administrator to request a change to your mobile configuration.

See Also:

Managing Records

Converting Leads

To convert a lead:

1. Open a lead, then tap **Convert Lead** on the toolbar.
2. Optionally, change the owner of the new records. This reassigns all notes, attachments, and open activities to the new owner but does not change closed activities. Set the **Send Email to the Owner** option to **On** to send an automated email to the new owner.
3. Create a new account or select an existing account.
4. If you are updating an existing person account, select the checkbox if you want to overwrite the `Lead Source` field in the person account with the value from the lead.
5. Name the new opportunity, or set the **Create New Opportunity** option to **Off** if you do not want to create an opportunity.
6. Select the status for the converted lead. Choices include statuses marked as “converted” by your administrator.
7. Tap **Convert**.

See Also:

Managing Records

Choosing a Price Book for an Opportunity

To include products on an opportunity, you must first choose a price book that contains the products you want to add. You can add products only from a single price book.

To select a price book:

1. Open an opportunity.
2. Scroll down and tap the Products related list.
3. Tap **Price Book**.
4. Select a price book.

Note: If you change the price book for an opportunity, all existing products are deleted from the opportunity.

See Also:

Managing Records

Searching

The easiest way to find records on your device is to search for them. Only a subset of your records are automatically synchronized to the mobile application. If you don't find a record on your device, you can continue your search online to retrieve items from Salesforce.com.

To search for records:

1. Type keywords in the search field at the top of the page. As you type, the mobile application displays items that contain the text you entered.
   - To search across all objects, use the Search tab.
   - To search a single object, use the search box on the relevant tab. For example, search for leads from the Leads tab.
2. Tap **Search**.
3. If you don't see the record you want, tap **Continue search on server...**.

   If your search returns more than 100 items, the mobile application won't display them. Tap **Refine search...** to type a new search string.
4. To open an item in the search results, tap the record. If the record is online instead of local, it's automatically downloaded to your device when you open it.

   Records you retrieve through a search are flagged on the mobile server and become part of your mobile data set. You can remove these retrieved records from your device by opening the App Info screen and tapping **Clear Search Results**.

Note: The mobile application stores your most recent search results for each tab. After searching for records on a tab, the Search Results view is active. Tap the name of the Search Results view to open a list and select a custom or standard view.

See Also:

Working with Records
Managing Records
Using iPhone Features with Salesforce Mobile

Using iPhone Features with Salesforce Mobile

Salesforce Mobile integrates with several native iPhone applications: Mail, Phone, Maps, and Safari. You can perform several actions on Salesforce.com records that launch iPhone applications.

See Also:

Working with Records
Searching
Making Calls
Sending Email
Mapping Addresses
Opening Web Pages

Making Calls

Salesforce Mobile works with the Phone application, so you can place a phone call directly from any Salesforce.com record that includes a phone number field. To make a call:

1. Open a record that contains a phone number field, such as a contact, lead, or account.
2. Tap the phone number you want to dial.
3. When the call is complete, tap **End Call** to close the Phone application and return to the Salesforce Mobile window.

Depending on your settings, you might be prompted to log the call after it ends.

Note: You cannot make calls on the iPod Touch.

See Also:

Using iPhone Features with Salesforce Mobile
Logging Calls

Logging Calls

Depending on your settings, Salesforce Mobile might prompt you to log a call after you hang up. Logging calls is an effective way to keep track of your tasks while you are away from your desk.

- If you tapped a phone number in Salesforce Mobile to initiate a call, you are prompted to log the call once the call is complete. Tap **Yes**. The Salesforce.com settings on your device control whether or not you are prompted to log the call.
- You might not have time to log the call immediately after it ends, or the call might not have been initiated from Salesforce Mobile. To log the call, open the record, and then tap **Log Call** on the toolbar.
- Logging a call launches a new task or event so you can enter details about the call. To define whether calls are logged as tasks or events, customize your settings.
- Tap **Save** to log the completed task or event to Salesforce.com. You can see the activity by viewing the activity history associated with the record.

See Also:

Making Calls

Sending Email

Salesforce Mobile is integrated with your device's email client, which means you can send emails from Salesforce.com records that contain email addresses. To send an email:

1. Open a record that contains an email address, such as a contact or lead.
2. Tap an email address to open the New Message window.
3. Compose your message and tap **Send**.
4. To close the Mail application and open the mobile application, press the Home button and then tap the Salesforce Mobile icon to return to the last Salesforce.com page you visited.

See Also:

Using iPhone Features with Salesforce Mobile

Mapping Addresses

Salesforce Mobile can help you find the location of a contact, account, or lead. To map an address:

1. Verify that your device is connected to a cellular or Wi-Fi network.
2. Open a contact, lead, or account record.
3. Tap an address to display the location in the Maps application.

   Note: Only addresses in blue text are hyperlinks.

4. To close the browser and open the mobile application, press the Home button and then tap the Salesforce Mobile icon to return to the last Salesforce.com page you visited.

See Also:

Using iPhone Features with Salesforce Mobile

Opening Web Pages

From Salesforce Mobile, you can launch Safari by selecting a link in a URL field. To visit a Web page from the mobile client application:

1. Open a Salesforce.com record that contains a URL field.
2. Tap the address of the website you want to visit to open the page in Safari.
3. To close the browser and open the mobile application, press the Home button and then tap the Salesforce Mobile icon to return to the last Salesforce.com page you visited.

See Also:

Using iPhone Features with Salesforce Mobile

Chapter 4

Working with Dashboards

Dashboards are a powerful tool in Salesforce.com that let you view snapshots of your data. You can access your dashboards from the mobile application.

Displaying Dashboards

Selecting the Dashboards tab displays the dashboard you most recently viewed. If this is your first visit to the Dashboards tab in Salesforce Mobile, the mobile application requests the dashboard you last viewed on the Salesforce.com website. Depending on the strength of the cellular or WiFi signal, it could take several minutes before the dashboard displays on the page.

To view a different dashboard, choose a dashboard from the `View Dashboard` drop-down list, and then tap **Go**. This drop-down list includes dashboards in all dashboard folders to which you have access.

Note the following about mobile dashboards:

- Mobile dashboards must be enabled by your Salesforce.com administrator.
- Mobile dashboards display in a single column.
- Links to custom report details are disabled in mobile dashboards.
- Dashboards do not automatically refresh in the mobile application.
- The mobile application lets you work offline. Without a wireless connection, you can see the last viewed dashboard, but you cannot refresh the dashboard or select a different one.

See Also:

Working with Dashboards
Refreshing Dashboards

Refreshing Dashboards

Dashboards do not automatically refresh in the mobile application. The data in each dashboard is as current as the date and time displayed in the `As of` field at the top of the dashboard. To refresh the dashboard:

1. Tap **Refresh** on the dashboards page.
2. Wait a few minutes to give the mobile application time to receive the updated information from Salesforce.com. You can leave the dashboard and perform other functions in Salesforce Mobile while the data refreshes.
3. Return to the dashboard and tap **Reload**. You can also reload the page by tapping **Actions** and then **Refresh Current Page**.

Note: You cannot use the **Refresh** button on the toolbar to request a dashboard refresh from Salesforce.com. You can only use it to view updated data after the refresh has already been submitted.

See Also:

Working with Dashboards
Displaying Dashboards

Chapter 5

Using Salesforce CRM Content in Salesforce Mobile

The Content tab lets you share content with customers and colleagues directly from the mobile application. The Content tab displays the content records that are automatically synchronized to your device. While the content record information is synchronized, the actual files associated with the content records are not. This lets you deliver content from the mobile application even when a file is too large to be downloaded to your device.

To display content records, open the Content tab. You can't search for content records on the Content tab. You also can't view a list of your subscribed content in the mobile application or filter the list of records based on a particular workspace. If you need a content record that isn't synchronized to your device, contact your Salesforce.com administrator and request an adjustment to your mobile configuration.

Note: The Content tab is only visible if Salesforce CRM Content is enabled for your organization and your Salesforce.com administrator made it available in the mobile application. Mobile Lite, the free version of the mobile application, does not support Salesforce CRM Content.

Viewing Content Details

To view information about a file, tap a file name in the Content tab to open the content detail page. The **Preview** option is available on the content detail page depending on the type of content you are viewing and your permissions. You can't preview some file types.

In the mobile application, you can't download a file to your device, upload a new version of the file, or subscribe to a content record.

See Also:

Using Salesforce CRM Content in Salesforce Mobile
Previewing Content

Previewing Content

You can preview content before delivering it, but your device must have a wireless connection. To preview content:

1. Open a content record, then tap **Preview**.
    - For PowerPoint files, the preview page displays a viewer that lets you navigate between the slides in the presentation.
    - For other file types, the preview page displays the first page of the content.
    - Some file types, like `.exe` files, can't be previewed.

2. If the preview displays only the first page of content, tap **Open** to view it in Safari. Safari can display many file types, such as `.pdf`, `.doc`, `.xls`, and `.ppt`.
3. Tap **Done** when you're finished previewing the content, or tap **Send** to deliver the content.

See Also:

Using Salesforce CRM Content in Salesforce Mobile
Viewing Content Details
Delivering Content

Delivering Content

Creating a content delivery in the mobile application sends the content's encrypted URL to any recipient, such as leads, customers, partners, and colleagues. To deliver content:

1. Open a content record, then tap **Preview**.
2. Tap **Send**.
3. Tap **Send Email**.
4. Tap the **To** field to select a Salesforce.com user, contact, or lead.

   To deliver content to a personal contact, skip this step. When you preview the email, you can select a recipient from your personal contacts.
5. Tap **Next** to preview the email.
6. To deliver content to a personal contact, type one or more names or email addresses in the `To` or `Cc` fields, or tap **+** and choose a contact to add the contact's email address.
7. Optionally personalize the subject and body of the message. Don't edit the delivery URL.

   To change the Salesforce.com recipient, tap **Cancel** to return to the previous page.
8. Tap **Send**.

See Also:

Using Salesforce CRM Content in Salesforce Mobile
Previewing Content

Chapter 6

Using Salesforce Chatter for Mobile

Note: Chatter Mobile is currently available through a pilot program. For information on enabling Chatter Mobile for your organization, contact salesforce.com.

Salesforce Chatter is a collaboration application that helps you connect with your coworkers and share business information securely and in real time.

Chatter Mobile is a standalone application that lets Salesforce Chatter users stay connected with coworkers from supported versions of BlackBerry, iPhone, iPad, and Android devices. All Salesforce.com users – even current Salesforce Mobile and Mobile Lite users – must download the Chatter Mobile application to use Chatter from a mobile device. An administrator must enable Chatter Mobile for your organization.

Chatter Mobile includes the Chatter, Profile, and People tabs. The feed that displays on the online application's Home tab appears on the mobile application's Chatter tab.

Not all of the functionality in Chatter is available from your mobile device. In the mobile application, you can:

- View and refresh Chatter feeds
- View coworkers' profiles
- Update your status
- View and edit your profile
- Post updates
- Follow and unfollow people and records

In the mobile application, you can't:

- Upload profile photos
- View Following or Followers lists
- Attach files to posts
- View files attached to posts
- Attach links to posts (although you can type a URL in the body of a post)
- Refresh feeds while working offline

Chatter Feeds Overview

Note: Chatter Mobile is currently available through a pilot program. For information on enabling Chatter Mobile for your organization, contact salesforce.com.

To see recent activities in Salesforce Chatter, view feeds:

- On the Chatter tab to see your recent activity, activities of people you follow, and changes to records you follow. You can also update your status on the Chatter tab.
- On a person's profile to see activities performed by that person. View your own profile to see your recent activity and to update your status.
- On record detail pages to see activities performed on a record.

You must follow people and records to see updates on the Chatter tab. To follow people or records from the mobile application, tap **Follow** on a profile or record detail page.

See Also:

Using Salesforce Chatter for Mobile
Using the Chatter Tab

Using the Chatter Tab

Note: Chatter Mobile is currently available through a pilot program. For information on enabling Chatter Mobile for your organization, contact salesforce.com.

The Chatter tab displays your recent activity, activities of people you follow, and changes to records you follow.

On the Chatter tab:

- Your feeds synchronize when you open the mobile application if a synchronization has not occurred in the past 20 minutes. You can manually synchronize your feeds by tapping the **Refresh** button. The button isn't available when a sync is in progress.
- Tap a person's name or photo to see the person's profile. Tap a record name to view the record. If a person that you follow performs an update on a record that isn't on your mobile device, you won't be able to see that update in your feed.
- Tap the **Post** button to update your status.

In the mobile application, updates are truncated at 150 characters, and comments are hidden. The post's talk bubble icon indicates how many comments are on the post. To navigate comments:

- Tap the post to view the post detail page, which includes the full text of the post along with its comment thread. Comments are truncated at 150 characters. The comments display chronologically from oldest to newest, but you can change the sort order in the Salesforce settings.
- Tap a comment to view the comment detail page, which includes the full text of the comment.
- Tap the **Next** and **Previous** buttons on the comment detail page to navigate between the comments in a post's comment thread.

See Also:

Using Salesforce Chatter for Mobile
Chatter Feeds Overview
Using the Profile Tab
Selecting Views
Editing Salesforce.com Settings

Using the Profile Tab

Note: Chatter Mobile is currently available through a pilot program. For information on enabling Chatter Mobile for your organization, contact salesforce.com.

The Profile tab lets you view and edit your profile. From the Profile tab, you can:

- Update your status
- Edit your contact information
- Add additional information about yourself in the About Me section
- View your Chatter feed

To edit your profile:

1. Open your profile.
2. Tap **Edit**.

   Users with the "Manage Users" permission can edit profiles for other users. You can't upload or delete a profile photo from the mobile application.
3. When you're done, tap **Save**.

See Also:

Using Salesforce Chatter for Mobile
Using the Chatter Tab
Using the People Tab

Using the People Tab

Note: Chatter Mobile is currently available through a pilot program. For information on enabling Chatter Mobile for your organization, contact salesforce.com.

The People tab displays a list of the people in your organization. Use the People tab find your coworkers and view their profiles. In the index along the right side of the list, tap a letter to jump to coworkers whose last name begins with that letter.

To view a profile:

1. Tap the People tab.
2. Tap the name of a coworker to view information about that user.
3. Tap **Chatter** to see activities performed by that user.

See Also:

Using Salesforce Chatter for Mobile
Using the Profile Tab
Posting and Commenting

Posting and Commenting

Note: Chatter Mobile is currently available through a pilot program. For information on enabling Chatter Mobile for your organization, contact salesforce.com.

In the mobile application, you can post on your profile, records, and other people's profile feeds. You can also comment on any post.

- To update your status, do one of the following:
  - Tap the **Post** button on the Chatter tab.
  - Open your profile, tap **Chatter**, then tap the **Post** button.
- To post on a feed on a profile, open the profile, tap **Chatter**, then tap the **Post** button.
- To post on a feed on a record, open the record, tap **Chatter**, then tap the **Post** button.
- To comment on a post, tap the post to open the post detail page, then tap the **+** button.
- To delete a post, tap the post to open the post detail page, then tap the **Delete** button.

See Also:

Using Salesforce Chatter for Mobile
Using the People Tab
Following People and Records

Following People and Records

Note: Chatter Mobile is currently available through a pilot program. For information on enabling Chatter Mobile for your organization, contact salesforce.com.

Follow people and records so you can see updates in your feed on the Chatter tab, including people's status updates and field changes, posts, and comments on records. The field changes you see in your feed are determined by the fields your administrator has configured for feed tracking.

- Tap **Follow** on a person's profile to follow people and see their status updates in your feed on the Chatter tab.
- Tap **Follow** on a record detail page to see updates to that record in your feed on the Chatter tab. You automatically follow records you own, except for tasks and events.
- Tap **Following** on a person's profile or a record detail page to stop following people or records. This stops future updates from people and records in your Chatter feed.

See Also:

Using Salesforce Chatter for Mobile
Posting and Commenting

Chapter 7

Managing the Application

Salesforce Mobile provides you with tools for managing the application. You can edit the settings, perform maintenance tasks, view information about the application, and install upgrades.

Editing Salesforce.com Settings

Salesforce Mobile has several settings for display, sorting, and logging options. To edit your settings:

1. From the Home screen of your iPhone or iPod touch, tap **Settings**.
2. Scroll down and tap **Salesforce**.
3. Set how your Salesforce Chatter feed comments are displayed:
   - To sort comments chronologically from oldest to newest, tap **Oldest to Newest**.
   - To sort comments chronologically from newest to oldest, tap **Newest to Oldest**.

   Note: Chatter Mobile is currently available through a pilot program. For information on enabling Chatter Mobile for your organization, contact salesforce.com.

4. Set when you are prompted to log calls placed from the mobile application:
   - To be prompted to log each call you place from the mobile application, tap **Log Calls**, then tap **Ask every time**.
   - To automatically log calls after placing them, tap **Log Calls**, then tap **Always**.
   - To never be prompted to log calls, tap **Log Calls**, then tap **Never**.
5. Set whether calls are logged as tasks or events:
   - To automatically log calls as tasks, tap **Keep Calls As**, then tap **Tasks**.
   - To automatically log calls as events, tap **Keep Calls As**, then tap **Events**.
6. Set how Salesforce.com contacts and leads are sorted:
   - To sort alphabetically by first name, tap **Sort Order**, then tap **First, Last**.
   - To sort alphabetically by last name, tap **Sort Order**, then tap **Last, First**.
7. Set how Salesforce.com contacts and leads are displayed:
   - To display alphabetically by first name, tap **Display Order**, then tap **First, Last**.
   - To display alphabetically by last name, tap **Display Order**, then tap **Last, First**.

   Caution: Do not change the application's URL settings unless instructed to do so by your Salesforce.com administrator.

8. Tap **Settings** to return to the previous page.

See Also:

Managing the Application
Application Information

Application Information

The App Info screen in Salesforce Mobile provides information about the mobile user, connection status, device, and local database of Salesforce.com records. You can also manage the Salesforce.com data on your iPhone or iPod touch from the App Info screen.

To access the Salesforce Mobile application information on your device:

1. Tap **More**, then tap **App Info**.
2. Perform a management task.
3. When you are finished, tap **More** to return to the list of objects, or select a tab to leave the App Info screen.

See Also:

Managing the Application
Editing Salesforce.com Settings
Upgrading Salesforce Mobile
View Application Details
Log Out
Synchronize Data
Clear Searched Records
Clear Recent Items
Erase Data
Send Support Logs

View Application Details

The App Info screen displays information about the application. The following list describes each table of information:

- **User Information**: Lists your Salesforce.com username, your Salesforce.com user ID, and the date and time of the last data synchronization.
- **Application Information**: Displays the release and build number of the Salesforce Mobile version installed on your phone.
- **Device Information**: Lists the name of your iPhone or iPod touch, the device ID, and the name of the mobile server to which the phone is connected.
- **Transport Status**: Contains information about the transport, which transfers data between the mobile client application and Salesforce.com.
- **Data**: Displays all the database tables that exist on the device and shows how many records are in each table.
- **Schema**: Displays all the schema tables that exist on the device and shows how many records are in each table.

See Also:

Application Information

Log Out

For security, the mobile application might lock after a certain period of inactivity. By default, your session times out after ten minutes, but your administrator can change the timeout value to a different interval.

To protect the sensitive data in Salesforce Mobile, you can log out of the application from the App Info screen. To log out:

1. Tap **More**, then tap **App Info**.
2. Tap **Log Out**.

   To access the application again, tap the Salesforce Mobile icon and enter your passcode.

Note: If your Salesforce.com administrator configured your settings so that your mobile session never times out, **Log Out** is not available.

See Also:

Application Information

Synchronize Data

A subset of your Salesforce.com data is synchronized to your device. The data selected is determined by the mobile configuration assigned to you by your administrator.

Once every 24 hours, Salesforce Mobile requests a full update of your data set. The filters contained in the mobile configuration are executed to rebuild the data set, and the resulting data records are sent to your phone.

Additionally, the mobile client application checks for data changes every 20 minutes. Because only one application can run on the device at a time, Salesforce Mobile cannot request data unless the application is open. When you launch the application, it performs an incremental update if a data synchronization has not occurred in the past 20 minutes. During this incremental update, the server retrieves any newly-created records that you own from Salesforce.com, and then sends that data to your phone. Modifications to any records already stored on your phone are also sent. If you want to manually refresh the data on your phone, you can force an incremental or full update at any time.

Note: You can view the date and time of the last data synchronization on the App Info screen. This information also displays at the top of each list view in the mobile application.

To perform a full update:

1. Tap **More**, then tap **App Info**.
2. Tap **Sync Now** on the toolbar, then tap **Refresh All Data**.

To perform an incremental update:

1. Open the App Info screen.
2. Tap **Sync Now** on the toolbar, then tap **Get Updated Records**.

See Also:

Application Information

Clear Searched Records

Although the data automatically delivered to your phone is defined by your administrator, you can search for and download records that do not match the filter criteria of your mobile configuration. After you search for and download a record, it is flagged on the mobile server and delivered to your phone on every full data update.

To clear the records you downloaded through online searches:

1. Tap **More**, then tap **App Info**.
2. Tap **Clear Data** on the toolbar, then tap **Clear Searched Records**.

See Also:

Application Information

Clear Recent Items

The Recents tab displays items you recently accessed in the mobile application. To clear the list of items on the Home tab:

1. Tap **More**, then tap **App Info**.
2. Tap **Clear Data** on the toolbar, then tap **Clear Recent Items**.

See Also:

Application Information

Erase Data

A device activated by a Salesforce.com user contains both the mobile client application and a set of the user's Salesforce.com data. You can remove the data from your device without uninstalling the mobile application. You might erase the data if an administrator gave you an iPhone that belonged to another user, and you need to activate your Salesforce.com account on the phone.

To erase the Salesforce.com data on your device:

1. Tap **More**, then tap **App Info**.
2. Tap **Clear Data** on the toolbar, then tap **Clear All and Deactivate**.

   After the data is removed, the activation screen appears so you can enter your Salesforce.com username and password.

See Also:

Application Information

Send Support Logs

To assist you with support issues, a salesforce.com support representative may need to access the logs on your device. The logs help diagnose potential problems. You do not need to send your support logs unless requested by a salesforce.com support representative or your administrator. To send your support logs:

1. Tap **More**, then tap **App Info**.
2. Tap **Send Debug Logs**. You might need to scroll the toolbar in order to see the button. Flick your finger to the left to reveal additional toolbar buttons.

3. Tap **OK**.

See Also:

Application Information

Upgrading Salesforce Mobile

Whenever you access the App Store, it checks for updates to applications you have installed. By default, the App Store also automatically checks for updates every week. When an upgrade of Salesforce Mobile is available, you can install the new version from the App Store.

To upgrade Salesforce Mobile:

1. From the home screen, tap the App Store icon.
2. At the bottom of the screen, tap **Updates**.

   If updates are available, the Updates screen automatically displays.
3. Tap Salesforce Mobile to see more information about the upgrade.
4. Tap **Free**, and then tap **Install**.
5. Enter your iTunes Store account and password and tap **OK**.

   After you begin downloading Salesforce Mobile, its icon appears on your Home screen and shows the status of the installation.
6. Tap the Salesforce Mobile icon to open the application.

   You might be prompted to enter your Salesforce.com username and password.

See Also:

Managing the Application
Application Information

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