



## Getting Started with SalesForce CRM

### Getting Started with SALESFORCE Part XIII

#### Description:

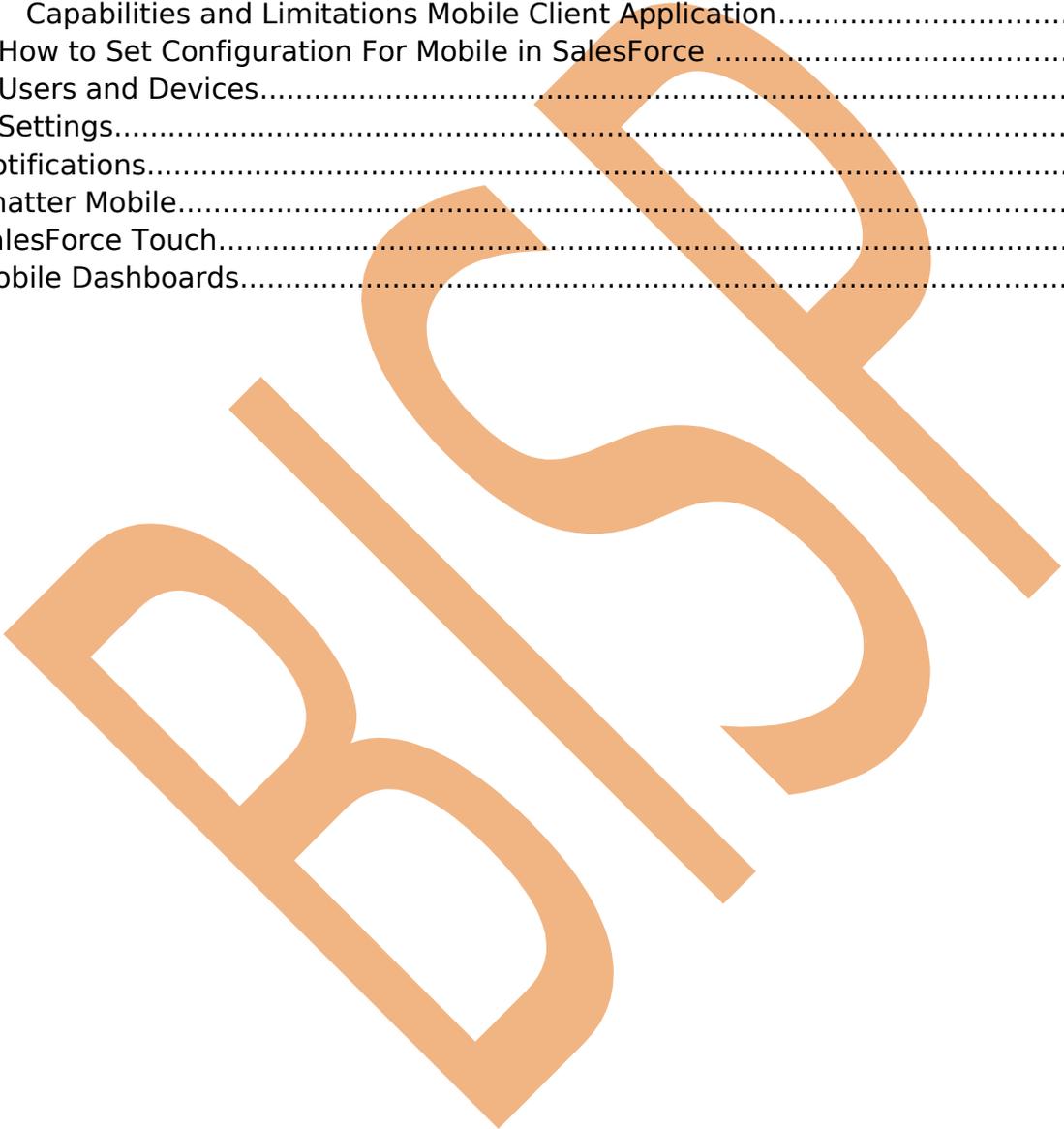
BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for SalesForce. The document focuses on How SalesForce work with Mobile Supported Devices. **Join our professional training program and learn from experts.**

#### History:

Version Date	Description Change	Author	Publish
0.1	Initial Draft	Chandra Prakash Sharma	5 <sup>th</sup> Mar 2012
0.1	Review#1	Amit Sharma	8 <sup>th</sup> Mar 2012

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## SalesForce Classic

SalesForce Classic is a client application for Smartphone's, Ipad provided by salesforce.com that allows users access to their data from Smartphone's. The SalesForce Classic client application exchanges data with SalesForce over wireless carrier networks, and stores a local copy of the user's data in its own database on the mobile device. The data sent to the device is determined by a *mobile configuration*. Mobile configurations are sets of parameters that define a relevant subset of the user's SalesForce records.

### Supported Devices



Android Phone



Black Berry 8000 Series



Windows Phone



ipad & iphone touch screen

### Capabilities and Limitations Mobile Client Application

SalesForce user download the Classic client application for supported mobile device, and they use the client interface to work with their locally stored SalesForce data. While the local data is updated wirelessly, it is important to note that SalesForce Classic does not maintain an open Internet connection, cannot execute JavaScript, and communicates with SalesForce asynchronously through the SOAP API. For these reasons, not all of the features in SalesForce are supported in the mobile client application.

#### Capabilities and limitations of the mobile application:

**Available Objects:** With SalesForce Classic, you can mobilize accounts, assets, contacts, content, opportunities, leads, tasks, events, price books, products, cases, solutions, notes, and custom objects. You cannot mobilize s-controls, ashups, merge fields, image fields, or custom links. The following do not execute in the mobile client application but will run server-side after a record is saved and submitted to SalesForce. workflow rules, validation rules, formula fields, and Apex triggers.

**Permissions, Record Types, and Page Layouts:** User permissions, record types, and page layouts are inherited from SalesForce.

**Default Field Values :** Salesforce Classic supports default field values only for Picklist and multiselect picklist. Default field values for other types of fields, such as checkboxes and numeric fields, do not appear in Salesforce Classic.

**Related Lists :** If you mobilize a related object in other words, add a child data set to a parent data set the object automatically becomes a related list on the mobile device.

**Dashboards and Reports :** Dashboards are available in the BlackBerry and iPhone client applications. Reports are available in the BlackBerry client applications. Reports are sent to the device in Excel format and display in a basic tab.

**Custom List Views :** BlackBerry users can create custom views in the mobile client application. BlackBerry and users Can access custom views created by Salesforce administrators in the Mobile Administration Console.

**Phone Integration :** All mobile users can log phone calls initiated from Salesforce Classic. BlackBerry users can capture inbound calls from the BlackBerry Call Log.

**Email Integration :** BlackBerry users can log emails sent from Salesforce Classic, emails sent from the device's native address book and contact manager, and incoming emails.

**Address Book Integration :** BlackBerry users can export Salesforce contacts and accounts to the native address book application on the device. They can also import entries in the native address book to Salesforce.

**Calendar Integration :** BlackBerry users can import Salesforce events to the BlackBerry calendar and export BlackBerry events to Salesforce.

**VisualForce Tabs and Web Tabs :** iPhone and BlackBerry users can access VisualForce tabs and web tabs in the mobile client application if the tabs have been mobilized by a Salesforce administrator.

## How to Set Configuration For Mobile in Salesforce

Setup > Mobile Administration > Salesforce Classic > Configurations

### Step 1 :-

The screenshot shows the Salesforce Classic Setup interface. The top navigation bar includes the Salesforce logo, a search bar, and user information (yogesh sharma, Setup, Help, Sales). The main navigation menu on the left includes Home, Chatter, Campaigns, Leads, Accounts, Contracts, Opportunities, Forecasts, Contacts, Cases, Solutions, Products, Reports, and Dashboards. The 'Administer' section is expanded, showing 'Data Management', 'Mobile Administration' (highlighted with a red box and arrow), 'Notifications', 'Chatter Mobile', 'Salesforce Classic' (highlighted with a red box and arrow), and 'Configurations' (highlighted with a red box and arrow). The 'Salesforce Classic' section is further expanded to show 'Users and Devices', 'Settings', 'Salesforce Touch', and 'Mobile Dashboards'. The main content area is titled 'All Configurations' and contains a description: 'Mobile configurations determine the data salesforce.com transmits to users' mobile devices, and which users receive that data on their mobile devices.' Below the description is a 'View: All Configurations' dropdown and a 'Create New View' link. A 'New Mobile Configuration' button is highlighted with a red box and arrow. Below the button is a table with columns 'Name', 'Description', and 'Active'. The table is currently empty, displaying 'No records to display.'

## Step 2 :-

### New Mobile Configuration

[Help for this Page](#) ?

#### Mobile Configuration Edit

---

#### Basic Information

**!** = Required Information

Name

Active

Description

Mobilize Recent Items  Maximum Number of Recent Items

Mobilize Followed Records

---

#### Assign Users and Profiles

Select the salesforce.com users and/or profiles that will use this mobile configuration. A user profile may have only one mobile configuration. Configurations assigned to individual users will override any configurations assigned to user profiles.

Search:  for:

Available Members	Assigned Members
User: yogesh sharma	User: Vikram yadav

---

#### Set Data Size Limit

To avoid overloading mobile devices, specify the maximum data size allowed for all data sets combined in this mobile configuration. Salesforce.com will not synchronize any data sets if the combined data size exceeds this limit.

Don't sync if data size exceeds:  MB

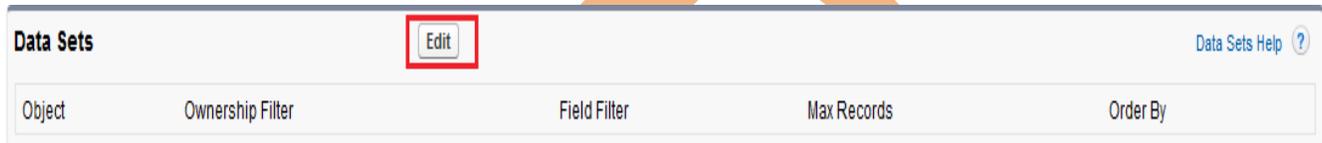
[How do I reduce the size of my data set?](#)

Fill All the Basic information fields, Assign user profile and set data size limit then click on save button.

**Note :-** For Enable mobile user **Setup > Manage Users > User** There is list of user choose any user and click on **Edit** link button, then new page open on this page you can find **SalesForce Classic User** check box checked this option then Save this page.

### **Step 3 :-**

then go to down on this page and find **Data Sets** then click on Edit button. because, I am not show all tab on mobile screen some specific tab want to show on mobile screen for managing Custom Object .



### **Step 4 :-**

Select Root node for adding custom object and click on sub node for adding fields objects. Then click on Done button.

## Mobile Access

[Done](#)

### Define Data Sets

Data sets allow you to define which records will appear on mobile devices associated with this configuration. Salesforce.com automatically saves changes you make to this page. Note that removing the last data set of an object type deletes any corresponding mobile views and excluded fields for that object.

Add...
Remove...

**Data Sets**

- [-] Position
  - [-] Job Application (Job Applications)
    - [-] Review (Reviews)
  - [-] Candidate
    - [-] Job Application (Job Applications)

**Position**

**Filter By Record Ownership**  
How do I choose?

All Records  
 User's Records  
 User's Team's Records  
 None (Search Only)

**Filter By Field**

--None--	--None--		AND

[Add Filter Logic...](#)

**Set Max Record Limit**

No Limit  
  Records

[Done](#)

## Test Data Size

[Test Data Size Help](#) ?

Test this mobile configuration against a user account to find out how much data would be delivered to a mobile device based on the defined data sets. Verify that the data size does not exceed the total data size limit for the mobile configuration. If a user account exceeds the data limit, the user cannot register a mobile device, and the device cannot synchronize with salesforce.com.

Data Size Limit: **5 MB**

Select a user    Include metadata

## Step 5 :-

For managing fields click on mobile object properties, if don't want to some fields not Necessary to add on mobile application you can remove this type fields. Select one any object name and click on Edit link button.

Mobile Object Properties		<a href="#">Mobile Object Properties Help</a> ?	
Action	Object	Blocked Mobile Permissions	Excluded Fields
<a href="#">Edit</a>	Candidate		
<a href="#">Edit</a>	Job Application		
<a href="#">Edit</a>	Position		
<a href="#">Edit</a>	Review		

## Step 6 :-

if want to block user for Edit, Delete, Create you can do it. then you don't want to fields on your mobile phone add in Excluded Fields then click on Save button.

Edit Mobile Configuration

## Mobile Access

Save Cancel

**Candidate: Blocked Mobile Permissions**

Prevent users from creating, editing, or deleting records in the mobile application. These mobile settings override the users' standard and custom object permissions.

Block Create } **You can block mobile user for create,edit, delete**

Block Edit }

Block Delete }

**Candidate: Excluded Fields**

Select Candidate fields that should be excluded from this mobile configuration

**Available Fields**

- Created Date
- Last Modified By
- Mobile Number

**Excluded Fields**

- System Modstamp
- Created By
- Last Activity Date
- Last Modified Date

Add

Remove

Save Cancel

### Step 7 :-

Then manage Mobile tab, find Mobile Tabs and click on Customize Tabs.

**Mobile Tabs** Customize Tabs

Mobile tabs have not been customized. Salesforce Classic uses the default tab behavior for this configuration.

Then Select your Tabs which want to need on mobile phone in available tabs and click on Add. click on save button.

Save Cancel

Select the tabs you want to display in the mobile application. If you do not select any tabs, the default tab behavior is used. By default, tabs for objects included in mobile configuration will be available to the user in the mobile application if they are exposed to the user in at least one salesforce.com application on the website.

**Available Tabs**

- Dashboards

**Selected Tabs**

- Position
- Job Application
- Reports

Add

Remove

Up

Down

Save Cancel

## Users and Devices

By using **User and Devices** you can see mobile login history like that Device Address, Status, Device OS, Client Version, Last Registration Date, User type.

**Erase Data :-** You can also Erase Data select particular user and erase all mobile uploaded data.

**Set Mobile Session Timeout :-** By using this button you can set mobile time out session.

**Delete Device :-** You can Delete Device by using Delete Device button.

### All Mobile Users and Devices

[Help for this Page ?](#)

View: All Mobile Users and Devices [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

	User Name ↑	Device Address	Status	Device OS	Client Version	Mobile Configuration	Last Registration Date	User Type
<input type="checkbox"/>	sharma, voqesh							Salesforce Classic
<input type="checkbox"/>	yadav, Vikram					Mobile Access		Salesforce Classic

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

## Settings

By using SalesForce Classic Setting you can Enable SalesForce Lite and Permanently Link user to Mobile Device. just click on Edit button.

## Salesforce Classic Settings

[Help for this Page](#)

Modify the Salesforce Classic settings for your organization.

### Salesforce Classic Settings

#### Standard Salesforce Classic Settings

**Enable Salesforce Classic Lite**  
This option allows users who do not have a mobile or Unlimited Edition license to use a free, restricted version of Salesforce Classic.

#### Advanced Salesforce Classic Settings

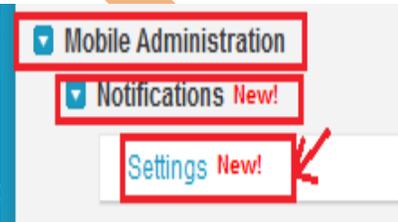
**Permanently Link User to Mobile Device**  
Select this option only if you want to prevent your users from switching devices. Note that enabling this option requires administrative maintenance when users need to switch to a different device. Without administrative intervention, users who need to switch to a different device will be unable to use Salesforce Classic.

## Notifications

This is new Features in Mobile Administration.

It Allow users to receive notifications in Chatter Mobile. just go to setting and enable this Notifications features .

Click on **Setup > Mobile Administration > Notificati**



Click on Setting Then checked **Enable push notificatio** and click on Save button.

## Notifications Settings

Allow users to receive notifications in Chatter Mobile.

### Notifications

**Enable push notifications**

## Chatter Mobile

By using Chatter Mobile in SalesForce you can get app setting for mobile chatter. Chatter Mobile downloadable app settings are now located in [Connected Apps](#).

**Setup > Mobile Administration > Chatter Mobile**

Quick Find

Expand All | Collapse All

**Force.com Home**

**Administer**

- Mobile Administration**
  - Notifications *New!*
  - Chatter Mobile *New!*
  - Salesforce Classic

**Chatter Mobile**

**Downloadable App Settings** ! = Required Information

Chatter Mobile downloadable app settings are now located in [Connected Apps](#)

## SalesForce Touch

Modify the settings for Salesforce Touch, a version of Salesforce for mobile touch screen devices.

it available only for iPad and iPhone.

**Setup > Mobile Administration > Salesforce Touch > Settings**

Quick Find

Expand All | Collapse All

**Force.com Home**

**Administer**

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration**
  - Notifications *New!*
  - Chatter Mobile *New!*
  - Salesforce Classic
  - Salesforce Touch**
    - Settings
- Mobile Dashboards
- Desktop Administration
- Email Administration
- Google Apps

**Salesforce Touch Settings** Help for this Page

Modify the settings for Salesforce Touch, a version of Salesforce for mobile touchscreen devices.

**Enable Salesforce Touch**

There are two ways to use Salesforce Touch: a downloadable app that users install from the Apple App Store or AppExchange Mobile and a mobile browser app that users access by logging in to Salesforce from a supported mobile browser.

You can control the Salesforce Touch apps that your organization can use and the mobile devices that can access each app.

**Downloadable App Settings**

Enable the Salesforce Touch downloadable app for these devices:

iPad

iPhone

**Mobile Browser App Settings**

Enable the Salesforce Touch mobile browser app for these devices:

iPad

iPhone

**Visualforce Settings**

This option turns on Visualforce pages in Salesforce Touch.

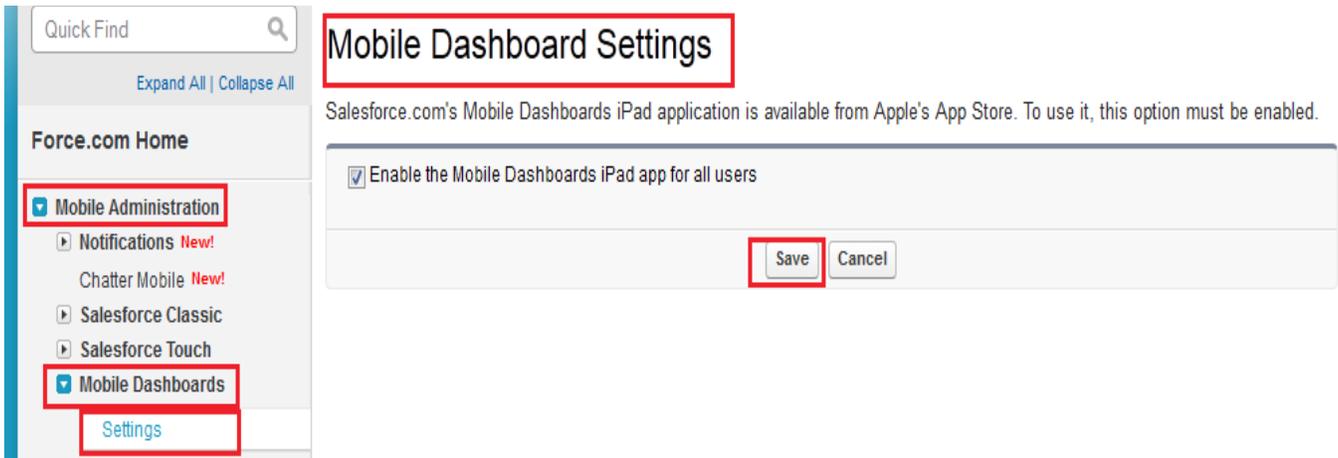
Enable Visualforce in Salesforce Touch

## Mobile Dashboards

SalesForce.com Mobile Dashboards iPad application is available from Apple's App Store. To use it, this option must be enabled.

**Note :-** It available for iPad application.

**Setup > Mobile Administration > Mobile Dashboards > Settings**



The screenshot shows the Salesforce Mobile Dashboard Settings page. On the left is a navigation sidebar with a search bar labeled "Quick Find" and a magnifying glass icon. Below it are links for "Expand All" and "Collapse All". The sidebar lists "Force.com Home" and several menu items: "Mobile Administration" (checked), "Notifications New!", "Chatter Mobile New!", "Salesforce Classic", "Salesforce Touch", "Mobile Dashboards" (checked), and "Settings". The main content area has a title "Mobile Dashboard Settings" in a red-bordered box. Below the title is a message: "Salesforce.com's Mobile Dashboards iPad application is available from Apple's App Store. To use it, this option must be enabled." There is a checkbox labeled "Enable the Mobile Dashboards iPad app for all users" which is checked. At the bottom right of the main content area are "Save" and "Cancel" buttons, with the "Save" button highlighted by a red box.

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