



Salesforce Classic Implementation Guide

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CHAPTER 1 What is Salesforce Classic Mobile?

In this chapter ...

- [The Mobile Environment](#)
- [Requirements for Using Salesforce Classic Mobile](#)
- [Wireless Connection Modes](#)
- [The Mobile Client Application: Capabilities and Limitations](#)
- [Device Synchronization](#)
- [Localization](#)

Salesforce Classic Mobile helps your teams succeed by allowing users to access their latest Salesforce data, whenever and wherever they need it, directly from Android™ and iPhone® devices. The Salesforce Classic Mobile app exchanges data with Salesforce over mobile or wireless networks, and stores a local copy of the user's data in its own database on the mobile device. Users can edit local copies of their Salesforce records when a data connection isn't available, and transmit those changes to Salesforce when a connection is available again. The app also promotes near real-time logging of critical information by prompting users to enter updates directly in Salesforce or Force.com AppExchange apps after important customer calls, emails, or appointments.



Note: We encourage you to consider using the new Salesforce1 mobile app, which brings the best of collaboration, CRM, and custom apps into one unified experience across Android, BlackBerry, iOS, and Windows smartphones and tablets. Salesforce1 is available as a downloadable app, as well as a mobile browser experience. See the Salesforce Help for information about rolling out the Salesforce1 Mobile App to your organization.

A Salesforce Classic Mobile license is required for each user to use Salesforce Classic Mobile. For organizations using Unlimited, Performance, and Developer Editions, Salesforce provides one mobile license for each Salesforce license. Organizations using Professional or Enterprise Editions must purchase mobile licenses separately.

Users are automatically assigned to the default mobile configuration when they activate Salesforce Classic Mobile from their mobile devices. Mobile configurations determine the data that is sent to each mobile user. Administrators can't view or edit the default mobile configuration.

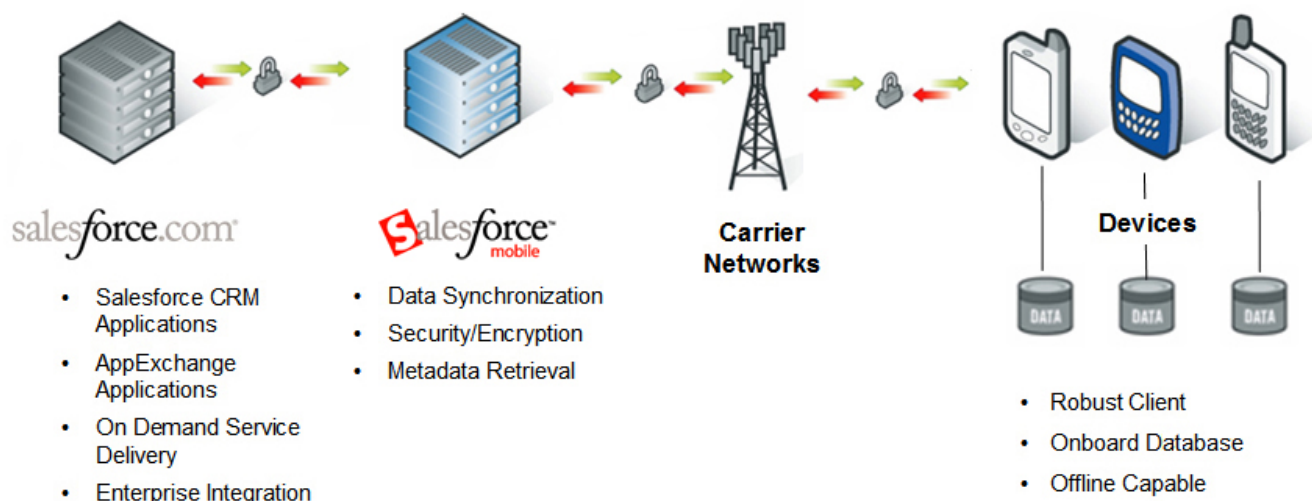
The Mobile Environment

The Salesforce Classic Mobile server brokers the exchange of data between Salesforce and wireless devices running the mobile client application. The server pulls selected data from your Salesforce organization and delivers it over wireless carrier networks to users' devices.

The Salesforce Classic Mobile client runs on the device and stores a local copy of the user's data in its own database. This allows users to work with their Salesforce records whether or not a wireless connection is available. Any changes or updates made on the device are immediately submitted to Salesforce by the mobile server. If a connection is not available, the updates are saved on the device and sent when the connection is restored.

The Mobile Administration Console within the Salesforce setup pages lets you manage the full life-cycle of your mobile deployment, including configuration, customization, and installation. This solution lets you maintain devices and make changes to mobile configurations completely over-the-air.

Salesforce Classic Mobile System Architecture



Requirements for Using Salesforce Classic Mobile

The Salesforce Classic Mobile app can run on Android and iOS operating systems. It's also supported by wireless carriers—if the device can establish a data connection to the Internet, it can typically run the mobile app. [Verify that your device is supported](#) before installing the mobile app. Recently released mobile devices aren't immediately supported because every device goes through the official certification and quality assurance process.

Notes About iOS Devices

Use of the Salesforce Classic Mobile app for Apple products 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 Classic Mobile for the iPhone and iPod touch devices, or delete the Salesforce Classic Mobile app from iPhone or iPod touch

EDITIONS

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Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions

devices, or require Salesforce to do any of the foregoing, without entitling the customer to any refund, credit or other compensation from such third-party or Salesforce.

- Service level agreements don't apply to the Salesforce Classic Mobile for iPhone product. Additional limitations are described in the Order Form Supplement for Salesforce Classic Mobile for iPhone, which users are required to accept upon download or installation of the Salesforce Classic Mobile for iPhone product.

Wireless Connection Modes

Each operating system communicates with Salesforce Classic Mobile in a different way. Below is a description of the connection modes per platform.

iPhone

iPhones communicate with the Salesforce Classic Mobile server through TCP/IP. Even when iPhones are integrated with a corporate server, the server cannot impose IT policies on the operating systems. Salesforce administrators managing iPhone users generally do not need to review their corporate network infrastructure before deploying Salesforce Classic Mobile.

The Mobile Client Application: Capabilities and Limitations

Users download the Salesforce Classic Mobile client application to their [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 Mobile 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.

The following list outlines the capabilities and limitations of the mobile application:

- **Available Objects:** With Salesforce Classic Mobile, 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, mashups, 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 Mobile supports default field values only for picklists and multiselect picklists. Default field values for other types of fields, such as checkboxes and numeric fields, do not appear in Salesforce Classic Mobile.
- **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 iPhone client applications. Reports are sent to the device in Excel format and display in a basic table. The report viewer in the mobile application does not support sorting, summaries, subtotals, or grouping.
- **Custom List Views:** 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 Mobile.
- **Visualforce Tabs and Web Tabs:** iPhone users can access Visualforce tabs and web tabs in the mobile client application if the tabs have been mobilized by a Salesforce administrator.

The total device memory required by the mobile client application is equal to the base application footprint plus the amount of user data sent during the initial installation. The base application footprint is approximately 500 KB. The initial data push is defined by the user's [mobile configuration](#) and can vary greatly depending on the user's mobile requirements. User data volumes range from as little as 50 KB to 100 KB to as much as several megabytes. Typically, the total application footprint—application plus data—falls in the 600 KB to 5 MB range. Deploying to users with mobile configurations that generate greater amounts of data require additional free memory.

Device Synchronization

The space limitations and usability restrictions of wireless devices make it necessary to send a subset of a user's Salesforce data to the device. The data selected is determined by the mobile configuration assigned to each user in the Mobile Administration Console. [Mobile configurations](#) are sets of filter parameters that determine the data Salesforce transmits to users' mobile devices, and which users receive that data on their mobile devices. You can edit the configurations at any time to change the data your users receive.

Once every 24 hours, Salesforce Classic Mobile requests a full update of a user's data set. The filters contained in the mobile configuration are executed to rebuild the data set, and the resulting data records are sent to the device. The mobile client application checks for data changes every 20 minutes. During this incremental update, the server retrieves any newly-created records from Salesforce owned by the user, and then sends that data to the device. Modifications to any records already stored on the device are also sent. This periodic update may retrieve some records which do not match the filter criteria of the user's mobile configuration. In this case, these records only exist on the user's device until the next full update.

 **Note:** Note the following about data synchronization:

- Because only one application can run on the iPhone at a time, Salesforce Classic Mobile cannot request a data update unless the application is open. When you launch the application on the iPhone, it performs an incremental update if a data synchronization has not occurred in the past 20 minutes.

Users can search for and download records that do not match the filter criteria of their mobile configuration. Those are called *marked records*; they are flagged on the mobile server and delivered to the user's device on every full data update. When a user downloads a record that does not match his or her mobile configuration, the mobile server also sends any records referenced by the record the user retrieved.

Listed below are common actions and the resulting synchronization behavior:

Action	Synchronization
The user creates a new record in Salesforce Classic Mobile.	The mobile application immediately sends the record to Salesforce. The user cannot edit the new record until the mobile application receives confirmation from Salesforce that the record was properly saved.
The user edits a record in Salesforce Classic Mobile, and the record no longer meets the criteria of the user's mobile configuration.	The record will be removed from the device at the next full data update, which occurs every 24 hours.
The administrator edits the data sets of a mobile configuration.	Users assigned to the mobile configuration will receive a new data set at the next incremental update, which occurs every 20 minutes.
The administrator changes the mobile page layout assigned to a mobile configuration.	Users assigned to the mobile configuration will see the new page layout on their devices at the next full data update, which occurs every 24 hours.

Localization

The Android and iPhone apps are available in English, Japanese, French, German, and Spanish.

Other languages have limited localization support. Hard-coded text in the mobile application, like menu options and system messages, cannot be localized; however, the following items are translated:

- Data entered by users

- Metadata set up by administrators, including field labels and related list names
- Translated terms set up in the Translation Workbench

CHAPTER 2 Planning a Mobile Deployment

In this chapter ...

- [Reviewing the Device Inventory](#)
- [Mobile Business Process Review](#)
- [Salesforce Classic Mobile Resources](#)

The process of enabling Salesforce Classic Mobile on a user's device is more than just providing access to a website. The wireless world introduces a new set of technical factors for Salesforce administrators, so your mobile deployment requires careful consideration and planning.

There are two key components of the planning process:

- reviewing the environmental factors that may have an impact on mobile deployment
- ensuring that the mobile configurations truly reflect your users' requirements for mobile access

The important parts of the planning process—understanding a company's network infrastructure and the unique ways its users leverage Salesforce—typically cannot be accomplished without significant involvement from members of your organization. Input may be required from IT personnel and users across a variety of Salesforce roles, such as business analysts, administrators, and end users.

Reviewing the Device Inventory

If your organization has existing mobile devices, review the inventory and verify that they are listed as [supported devices](#).

To find out if the devices meet the model and memory requirements for Salesforce Classic Mobile:

- On an iPhone or iPod touch, tap **Settings** > **General** > **About** to view the amount of free space on the device and the operating system version.

When possible, use the latest devices. Because they have more memory and faster processors, they provide a better mobile experience. Also, make sure users are familiar with the devices.

Mobile Business Process Review

When your organization implemented Salesforce, you likely evaluated your business processes and set up the application to increase productivity and meet your business objectives. Implementing Salesforce Classic Mobile also requires analysis and planning. Not all of your users need mobile access to Salesforce, and your mobile users likely have different requirements for visibility into their Salesforce data. During the mobile business process review, you will identify which users will be enabled for Salesforce Classic Mobile, what they need to accomplish in the field, and what initial data they will receive on their mobile devices. You will use this information to create your mobile configurations.

Mobile configurations are sets of parameters that determine the data Salesforce transmits to users' mobile devices, and which users receive that data on their mobile devices. Organizations can create multiple mobile configurations to suit the needs of different types of mobile users. For example, one mobile configuration might send leads and opportunities to the sales division, while another mobile configuration might send cases to customer support representatives. For more information, see [Manage Salesforce Classic Mobile Configurations](#) on page 36.

Evaluating and Defining Groups of Mobile Users

Evaluate the functional groups in your Salesforce organization and decide which users have a clear need to access their Salesforce data in the field. Target these groups during the initial phase of your mobile deployment, then roll out the mobile solution to other groups who might benefit from the ability to use Salesforce from a wireless device.

Different functional groups—such as account executives, sales managers, service managers, and administrators—typically have different mobile requirements, so you will likely create a mobile configuration for each functional group in your organization. You can assign individual users and profiles to each mobile configuration. If you assign a profile to a mobile configuration, the mobile configuration applies to all Salesforce Classic Mobile users with that profile unless a specific user is assigned to another mobile configuration.

Analyzing Users' Mobile Objectives

Understanding what your users want to accomplish in Salesforce Classic Mobile will help you decide which objects need to be mobilized. To begin defining your mobile configurations, examine use cases for different functional groups. Users might want to:

- Log calls and emails
- Look up and edit records
- Review activity history
- Create opportunities and add products
- Assign tasks and events
- Use custom objects

Identifying User Requirements for Mobility

During a mobile deployment, many customers want to know why users cannot receive all of their Salesforce data on a mobile device. Mobile devices by nature have memory and performance constraints, and they cannot physically store massive amounts of data. Additionally, mobile users have different needs than traditional Salesforce users. An account executive in the field probably does not want to navigate through 300 opportunities on the small screen of a handheld device; she might prefer to see just opportunities she owns that are scheduled to close this month, and then use the search feature for the opportunities that were not automatically sent to her device.

Identify the relevant records for each group of mobile users. For example, you might be able to limit opportunities by amount, tasks by activity date, or accounts by ownership. A well-designed mobile configuration delivers most of the data a user requires while staying within the memory limitations of the mobile device.

SEE ALSO:

[Sample Data Sets](#)

Salesforce Classic Mobile Resources

Numerous resources are available to assist you with the planning of a successful Salesforce Classic Mobile deployment.

Where to Get Help

Refer to the [Salesforce Classic Mobile website](#) for links to valuable resources, such as:

- Salesforce Professional Services
- Mobile Certified Salesforce partners
- Salesforce Classic Mobile training classes
- Salesforce Classic Mobile online demos

Product Documentation

Review Salesforce Classic Mobile documentation to become more familiar with the product:

- [Salesforce Classic Mobile User Guide for iPhone](#)

Device Documentation

Visit the following websites for more information about your mobile devices:

- [Apple](#) for iPhones and the iPod touch

CHAPTER 3 Salesforce Classic Mobile Administration

In this chapter ...

- [Salesforce Classic Mobile Implementation Tips and Best Practices](#)
- [Enabling Salesforce Classic Mobile Users](#)
- [About the Salesforce Classic Mobile Default Configuration](#)
- [Define Data Sets](#)
- [Edit Object Properties for Salesforce Classic Mobile](#)
- [Assign Tabs to a Salesforce Classic Mobile Configuration](#)
- [Create List Views for Salesforce Classic Mobile](#)
- [Set Up The Mobile Dashboards for iPad App](#)
- [Enable Reports in Salesforce Classic Mobile](#)
- [Salesforce Classic Mobile Usage Data in Custom Report Types](#)
- [Setting Up Salesforce CRM Content for Salesforce Classic Mobile](#)
- [Create Links to Web and Visualforce Mobile Pages for Salesforce Classic Mobile](#)
- [Notifying Users about Salesforce](#)

After planning the mobile deployment, Salesforce administrators can begin configuring the Mobile Administration Console in Salesforce. This chapter walks you through the process of working with the Mobile Administration Console and managing your mobile users.

Classic Mobile
Availability

- Manage Salesforce
Classic Mobile
Configurations
- Manage Salesforce
Classic Mobile Tabs
- Manage Salesforce
Classic Mobile
Devices

Salesforce Classic Mobile Implementation Tips and Best Practices

Set up the Salesforce Classic Mobile app using these tips and best practices.

Building Lean Data Sets

- Keep the data sets in your mobile configurations as small as possible. Not only do lean data sets greatly improve the Salesforce Classic Mobile app's performance, but they also make the app easier to use. Pushing massive amounts of data to the device might seem like a good idea, but the important records tend to get lost among the ones that aren't relevant to users' day-to-day activities. Small data sets are powerful because the Salesforce Classic Mobile app synchronizes with Salesforce every 20 minutes, so the data is constantly refreshed with new and updated records. Even if your mobile configurations don't account for every possible record your users might need, they can search for records that aren't automatically synchronized to their devices.

To build small data sets:

- Nest the objects in the data set tree. For example, add contacts as a child data set of the account object so that the data set includes contacts related to the mobilized accounts instead of all the user's contacts.
 - Avoid setting the record ownership filter to All Records unless your organization uses a private sharing model. It's unlikely that users need to see all of an object's records on their devices. Instead of mobilizing all opportunity records, for example, mobilize just the opportunities owned by the user or the user's opportunity team.
 - Use filters that synchronize the most relevant records. For example, even if you limit the opportunities on the device to records owned by the user, you could further prune the data set by mobilizing only opportunities closing this month.
 - Set a record limit to prevent the data set from getting too large. Generally, a single data set should generate no more than 2,500 records.
- Another way to build lean data sets is to [mobilize the Salesforce recent items list](#), add the data sets, and set the record ownership filters in your data sets to None (Search Only). The user's data set is populated with records recently accessed in Salesforce, and those records in turn synchronize additional data based on the data set hierarchy. For example, let's say you create a data set with the account object at the root level and add the contact, task, and event objects as child data sets. When the Salesforce Classic Mobile app synchronizes an account from the Salesforce recent items list, it also synchronizes the contacts, tasks, and events related to that account.
 - If you're not sure which fields to use as filters for your data sets or mobile views, consider using the Last Activity Date field. For example, set up a filter that synchronizes contacts with an activity logged this week or this month. The Last Activity Date field is a better indicator of a record's relevance than the Last Modified Date field—often the main detail of a record remains unchanged even though users frequently log related tasks and events.

Mobilizing Records Users Need

- Before mobilizing a custom object, make sure the object's functionality is compatible with the Salesforce Classic Mobile app. Salesforce Classic Mobile doesn't support S-controls, mashups, merge fields, image fields, or custom links.
- To obtain a relevant set of activities, mobilize the task and event objects at the root level of the data set hierarchy and nest them under parent objects, like contacts, accounts, and opportunities. Adding tasks and events at multiple levels ensures that users will see their personal activities and activities related to the records on their devices. Avoid mobilizing too much activity history or too

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional** and **Enterprise** Editions

USER PERMISSIONS

To view Salesforce Classic Mobile configurations:

- "View Setup and Configuration"

To create, change, or delete Salesforce Classic Mobile configurations:

- "Manage Mobile Configurations"

many tasks and events not owned by the user. Generally, there are more task and event records in an organization than any other type of record, so it's easy to bloat data sets with too many activities.

- If your sales representatives frequently take orders in the field and need a comprehensive inventory list, add the product object at the root level of the data set hierarchy. Nesting the opportunity product object below the opportunity object won't mobilize all products.
- If your users need to assign tasks to other users or change the record owner, mobilize the user object so that the names of other users will be available on the device. Avoid mobilizing all user records—instead, set up filters based on the role or profile.
- Be sure that users assigned to a mobile configuration have field-level access to all the fields used in the configuration's filter criteria. If a user doesn't have access to a field in a data set's filter criteria, the Salesforce Classic Mobile app won't synchronize the records for that data set or its child data sets.
- You can sometimes use cross-object formula fields to work around limitations of the Salesforce Classic Mobile app. For example, Salesforce Classic Mobile doesn't support campaigns, so you can't add the campaign object as a data set and add the opportunity object as its child data set to get the related records. However, you can create a text formula field on the opportunity object equal to the name of the parent campaign. The field needs to be visible, but it doesn't need to be included on your page layouts. Then add the opportunity object to the data set and use the new formula field to filter opportunities related to a specific campaign.
- Although a mobile configuration might include an object at multiple levels in the data set hierarchy, users won't see duplicate tabs in the Salesforce Classic Mobile app. Only one Task tab appears on the device even if you mobilize the task object at the root level and as a child data set of three objects.

Customizing Mobile Configurations

- Clean up your mobile page layouts by excluding fields from the objects in the mobile configuration. Less data is sent to the device, and mobile users don't have to scroll through unnecessary fields.
- If you mobilize the Dashboards tab, be sure to select any other tabs that should appear in the Salesforce Classic Mobile app. Customizing the tabs for a mobile configuration overrides the default tab set—if you only mobilize the Dashboard tab, it will be the only tab sent to the device.
- Due to the small size of mobile device screens, you can only select two display columns for mobile views. If you need three columns of data, create a text formula field on the object that concatenates the three fields, then use the formula field in the mobile view criteria.
- When creating mobile views, you can filter based on the current user with the `$User.ID` global variable, but you can't enter a user's name as a value in the filter criteria. To build a view based on users, create a text formula field on the appropriate object, then use the formula field in the mobile view criteria. For example, to create a view that displays opportunities owned by an opportunity team, create a text formula field on the opportunity object that contains the opportunity owner's user ID or role, then create a view that filters on values in that field.

Testing and Deploying the Mobile Product

- It's important to test mobile configurations to make sure they're synchronizing an acceptable amount of data. Test configurations against active users who own a very large number of records. Typically, most data sets generate between 500 KB and 4 MB of data. If the data sets are over 4 MB, refine the filter criteria to limit the amount of data sent to the device.
- You can use the Salesforce Classic Mobile app in the sandbox before deploying to your organization.
- Use of the Salesforce Classic Mobile app requires a data plan. The wireless data volume for the Salesforce Classic Mobile app varies greatly between customers and even users in the same organization. It's impossible to predict your organization's data usage, but we can offer some guidelines:
 - The initial data download consists of records that match the criteria specified in the user's mobile configuration and the metadata needed to support these records when disconnected. On average, the data sizes range from 500 KB–4 MB.

- After the initial download of data, incremental update requests are initiated by the client app every 20 minutes. Each of these requests and the corresponding server response are approximately 200 bytes.
- If any new data is downloaded to the client app as a result of the update request, only the new or changed values are sent. For example, the Salesforce Classic Mobile app only downloads the new phone number in a contact record, not the entire contact record. The amount of data transmitted differs for every organization and every user.

Generally, the volume of data transmitted by the Salesforce Classic Mobile app is low compared to moderate email usage.


Best Practices

- Use the zero-administration deployment option to experiment with the Salesforce Classic Mobile app before you set up mobile configurations. You'll create better blueprints for your mobile configurations if you've tried using the Salesforce Classic Mobile app.
- Talk to users about their favorite reports, views, and dashboards to get ideas for what filter criteria to use in mobile configurations.
- After setting up mobile configurations, deploy the Salesforce Classic Mobile app on a limited basis with a select group of users. Adjust the mobile setup based on their feedback, then deploy to all of your users.


Enabling Salesforce Classic Mobile Users

To enable users to access Salesforce Classic Mobile:

1. Allocate mobile licenses to users by selecting the `Salesforce Classic Mobile User` checkbox on the user record.
2. Edit each custom profile to which Salesforce Classic Mobile users are assigned to include the "API Enabled" permission. Salesforce Classic Mobile users need access to the API so their mobile devices can communicate with Salesforce. The "API Enabled" permission is enabled by default on standard profiles.

 **Note:** The Android and iPhone apps are available in English, Japanese, French, German, and Spanish. Contact Salesforce to turn on Salesforce Classic Mobile for your organization.

To prevent users from activating Salesforce Classic Mobile on their mobile devices before you're ready to deploy the app, disable the `Salesforce Classic Mobile User` checkbox for all your users.

 **Note:** If you deselect this checkbox for a user who is already assigned to a mobile configuration, Salesforce removes that user from the mobile configuration and assigns the user to the default mobile configuration.

The free version of Salesforce Classic Mobile is available only for orgs that enabled this option before Summer '16. With Summer '16, all other orgs (new and existing) don't see this option.

EDITIONS

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Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions

USER PERMISSIONS

To view Salesforce Classic Mobile settings:

- "View Setup and Configuration"

To change Salesforce Classic Mobile settings:

- "Manage Mobile Configurations"

About the Salesforce Classic Mobile Default Configuration

Mobile configurations for the Salesforce Classic Mobile app are sets of parameters that determine what data Salesforce transmits to users' mobile devices and which users receive the data on their mobile devices. A default mobile configuration is provided for Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations. Administrators can't view or edit the default mobile configuration.

Users are automatically assigned to the default mobile configuration when they activate their Salesforce account from a supported mobile device using the Salesforce Classic Mobile app.

The default mobile configuration:

- Allows users with an assigned mobile license to install and activate Salesforce Classic Mobile, even if you haven't yet assigned them to a mobile configuration.

You can [disable Salesforce Classic Mobile](#) to prevent users from activating the Salesforce Classic Mobile app.

The default configuration can mobilize the following objects:

- Accounts
- Assets
- Cases
- Contacts
- Dashboards
- Events
- Leads
- Opportunities
- Reports
- Solutions
- Tasks



Note:

- Not all objects available in the Salesforce Classic Mobile app are mobilized with the default configuration.
- Assets aren't available as a tab in the Salesforce Classic Mobile app but display as a related list for accounts, cases, and contacts.

The default configuration automatically synchronizes records the user recently accessed in Salesforce on the Salesforce Classic Mobile app. Users can search for records that aren't automatically synchronized; once the user downloads a record, the record becomes a permanent part of the 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.

IN THIS SECTION:

[Create Salesforce Classic Mobile Configurations](#)

[Test Salesforce Classic Mobile Configurations](#)

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Editions


Create Salesforce Classic Mobile Configurations

Mobile configurations are sets of parameters that determine the data Salesforce transmits to users' mobile devices, and which users receive that data on their mobile devices. Organizations can create multiple mobile configurations to simultaneously suit the needs of different types of mobile users. For example, one mobile configuration might send leads and opportunities to the sales division, while another mobile configuration sends cases to customer support representatives.

Before creating your mobile configurations, plan which profiles and users you want to assign to each configuration. Each mobile configuration only affects the mobile devices of users assigned to the configuration.

To create a mobile configuration:

1. [Enter Basic Information](#)
2. [Assign Users and Profiles](#)
3. [Set Total Data Size Limit](#)
4. [Complete Your Mobile Configuration](#)

 **Note:** A [default mobile configuration](#) is provided for Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations. You can't view or edit the default configuration.

Enter Basic Information

1. From Setup, enter *Salesforce Classic Configurations* in the **Quick Find** box, then select **Salesforce Classic Configurations** to access the mobile configurations list page.
2. Click **New Mobile Configuration**.
3. Enter a name for the mobile configuration.
4. Select the **Active** checkbox if you want to activate the mobile configuration immediately after creating it. The mobile configuration does not work until you select this checkbox.

If you deactivate an active mobile configuration, Salesforce saves all requests from devices of the users assigned to the mobile configuration for up to one week. If you reactivate the mobile configuration, Salesforce executes those requests in the order received.

5. Optionally, enter a description for the mobile configuration.
6. Optionally, select the **Mobilize Recent Items** checkbox to mark recently used records in Salesforce for device synchronization. Selecting this option ensures that mobile users assigned to the configuration will not have to search for and download items they recently accessed on Salesforce, even if those records do not meet the configuration's filter criteria. Only records belonging to mobilized objects can be marked for device synchronization; for example, if you do not mobilize the account object in a configuration, users assigned to that configuration cannot automatically receive recent accounts on their devices.
7. If you select the **Mobilize Recent Items** checkbox, select a value from the **Maximum Number of Recent Items** drop-down list. Set a low number if your users have minimal free space on their mobile devices.
8. Optionally, select the **Mobilize Followed Records** checkbox to automatically synchronize records users are following in Chatter to their mobile device. The device only synchronizes followed records for objects included in the mobile configuration's data set.

The **Mobilize Followed Records** checkbox is only available if Chatter is enabled for your organization.

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To create, change, or delete Salesforce Classic Mobile configurations:

- "Manage Mobile Configurations"

Assign Users and Profiles

You can assign individual users and profiles to each mobile configuration. If you assign a profile to a mobile configuration, the mobile configuration applies to all Salesforce Classic Mobile users with that profile unless a specific user is assigned to another mobile configuration.



Tip: For ease of administration, we recommend that you assign mobile configurations to profiles; however, you may have situations in which you need to assign a configuration directly to individual users.

To assign users and profiles to a mobile configuration:

1. In the Search drop-down list, select the type of member to add: users or profiles. This drop-down list is not available if you have not enabled the `Mobile User` checkbox on any user records, or if all users are already assigned to a mobile configuration; in that case, you can only assign profiles to this mobile configuration.
2. If you do not immediately see the member you want to add, enter keywords in the search box and click **Find**.
3. Select users and profiles from the `Available Members` box, and click the **Add** arrow to add them to the mobile configuration.

You can assign each user and profile to only one mobile configuration.

The `Available Members` box only displays users who have the `Mobile User` checkbox enabled.

4. If there are users or profiles in the `Assigned Members` box you do not want to assign to this mobile configuration, select those users and click the **Remove** arrow.



Warning: Removing a user from an active mobile configuration deletes the Salesforce-related data on the user's mobile device but does not delete the client application.

Set Total Data Size Limit

Different types of mobile devices offer different memory capacities, and some devices experience serious problems if all of the flash memory is used. To avoid overloading mobile devices, optionally specify a total data size limit for each mobile configuration. The total data size limit prevents Salesforce from sending too much data to the mobile devices of users assigned to the mobile configuration.

To set the total data size limit, use the `Don't sync if data size exceeds` drop-down list to specify the amount of memory that is consistently available on the mobile devices of users who are assigned to this mobile configuration. If the combined size of all the data sets exceeds this limit, users assigned to this profile receive an error message on their mobile devices, and Salesforce will not synchronize any data sets in this mobile configuration. [Test your mobile configuration](#) to make sure the data sets do not exceed the total data size limit.



Tip: To reduce the size of your data, do one or more of the following:

- Delete a data set.
- Reduce the scope of your data sets.
- Refine the filter criteria of your data sets.

Complete Your Mobile Configuration

Click **Save**. Note that your mobile configuration is not active until you select the `Active` checkbox.

Test Salesforce Classic Mobile Configurations

When you [create a Salesforce Classic Mobile configuration](#), you specify a total data size limit for the configuration. The total data size limit prevents Salesforce from sending too much data to the mobile devices of users assigned to the mobile configuration. After [defining the data sets](#), it's important to test the mobile configuration to make sure the total data size limit isn't exceeded.

To estimate the size of the data set that the mobile configuration will deliver to a user's device:

1. From Setup, enter *Salesforce Classic Configurations* in the Quick Find box, then select **Salesforce Classic Configurations**. Then click the name of the mobile configuration that you want to test.
2. In the Data Sets related list, click **Edit**.
3. In the Test Data Size section, click the lookup icon next to the `Select a user` field to choose the user you want to test. While users must be mobile-enabled in order to assign them to mobile configurations, you can test the configuration's data size against any user account.

The `Select a user` field defaults to the name of the user currently logged in; however, it is important to test a mobile configuration with the accounts of users who will actually be assigned to the configuration, particularly users who own a large number of records.

4. Select the **Include metadata** checkbox to include metadata in the estimate. Metadata consists of page layout and schema information, and the amount of metadata sent to a device can be very high depending on the size of your organization and the complexity of its setup.



Warning: It might take a while for Salesforce to calculate the metadata size in addition to the data size. Even if you choose to hide the metadata in your test results, the metadata is still factored into the total data size when the mobile device synchronizes with Salesforce.

5. Click **Estimate Data Size**.

The size of each data set is calculated. Results display in the hierarchy tree, which is the left pane of the data set region at the top of the page. Additional results appear in the Test Data Size section below the hierarchy.

- In the hierarchy tree, two numbers appear next to each data set. The first represents the number of records generated by the data set, and the second represents the total size of the data set in bytes or kilobytes. This breakdown is useful for identifying which data sets might require additional filtering criteria to reduce the size.
- The Test Data Size section provides an estimate of the data that the current mobile configuration would deliver to the selected user's device, including:
 - The size and number of records in each object's data set.
 - The total size and number of records, which includes records in the data set and marked records. A marked record is a record that is not part of a user's mobile configuration. There are two ways marked records can become part of the data set:
 - The user downloads records to his or her device through online searches, and the records are flagged so that they get sent to the user's device every time the device synchronizes with Salesforce.
 - Records in the user's data set contain lookup fields to records that do not match the mobile configuration's filter criteria. Salesforce synchronizes the records referenced in the lookup fields so that users do not encounter broken links in the mobile app.



Tip: For an accurate count of the marked records, synchronize the data in the mobile app before estimating the data size. To synchronize the data:

- On an Android device, tap **Application Info > Sync Now > Refresh All Data**.

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited,** and **Developer** Editions, and for an extra cost in: **Professional** and **Enterprise** Editions


USER PERMISSIONS

To view Salesforce Classic Mobile data sets:

- "View Setup and Configuration"

To test Salesforce Classic Mobile configurations:

- "Manage Mobile Configurations"

- On an iPhone device, tap **More**, then tap **App Info**. Tap **Sync Now**, then tap **Refresh All Data**.
 - The size of the metadata that would be sent to the device for the user, if you selected the **Include metadata** checkbox.
 - The total mobilized data set, which is the sum of all the records.
 - Reports are not included in the data size estimate.
6. Compare the test results to the total data size limit that was set for the configuration; the limit is located in the top of the Test Data Size section. Click the size limit to increase or decrease the value on the Edit Mobile Configuration page.
- If the total data size is below the limit, the selected user can safely be assigned to the mobile configuration. However, keep in mind that the test results are an estimate because different devices have different storage algorithms.
 - If the total data size exceeds the limit, reduce the size of the data by reducing the scope of your [data set](#), refining the filter criteria of your data sets, deleting a data set, or [removing fields from the mobile page layout](#). Repeat the testing process until the data is below the total limit.
-  **Note:** The data size estimate in the Test Data Size section does not automatically refresh if you edit the data sets. Click **Refresh Data Size** to update the test results.


Define Data Sets

Accessing Salesforce from a mobile device is very different than accessing it from your computer. This is because mobile devices generally have less memory and screen size than computers, and they do not maintain a constant network connection. To work with these limitations, each mobile configuration only transfers data sets, which are subsets of the records users access in the Salesforce online user interface. Mobile devices store data sets in on-board databases, allowing users to access their most important records and work offline when no network connection is available. Salesforce automatically synchronizes the on-board databases when the mobile device reestablishes a network connection.

Each data set can contain records related to a single object and is classified by the name of that object. For example, the Accounts data set only includes account records.

Data sets can have child data sets, which are data sets that contain records associated with a top-level (parent) data set. For example, if the first level of your hierarchy has an Accounts data set, you can add a Contacts child data set that includes all contact records related to the account records. Child data sets appear as related lists on mobile devices.

A single mobile configuration can have multiple data sets for the same object and at different levels. For example, you can have an Events parent data set and an Events child data set under Leads.

 **Tip:** Review the [sample data sets](#) to see how you might define data sets for common groups of Salesforce users.

After [creating a mobile configuration](#), you must define its data sets. To access the data sets for a mobile configuration:

1. From Setup, enter *Salesforce Classic Configurations* in the Quick Find box, then select **Salesforce Classic Configurations**. Then click the name of the mobile configuration that you want to modify.
2. In the Data Sets related list, click **Edit**.
3. From the Data Sets page, you can:

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions

USER PERMISSIONS

To view mobile data sets:

- “View Setup and Configuration”

To create, change, or delete mobile data sets:

- “Manage Mobile Configurations”

- [Add a data set.](#)
- Remove a data set by selecting the data set you want to remove and clicking **Remove**.
- Edit a data set by selecting the data set you want to edit in the hierarchy. The right pane displays the filters for that data set.
- [Test your mobile configuration.](#)

As you define and modify the data sets, Salesforce automatically saves your changes.

4. Click **Done** when you are finished.

Adding Data Sets

To add a data set:

1. In the hierarchy, select **Data Sets** to create a parent data set, or select an existing data set to create a child data set.
2. Click **Add...**
3. In the popup window, select the object for the records you want the data set to include. Salesforce lets you create parent data sets for all custom objects and the following standard objects:
 - Accounts
 - Assets
 - Attachments
 - Cases
 - Contacts
 - Content
 - Events
 - Leads
 - Notes
 - Opportunities
 - Price Books
 - Products
 - Solutions
 - Tasks
 - Users



Note:

- Although attachments are available as a data set, they're only supported in Salesforce Classic Mobile for Android.
- Salesforce Classic Mobile supports default field values only for picklists and multiselect picklists. Default field values for other types of fields, such as checkboxes and numeric fields, do not appear in Salesforce Classic Mobile.

When adding to an existing data set, the popup window displays any object with a relationship to the selected object. This includes child objects, and also parent objects with a master-detail or lookup relationship to the selected object.

For example, assume you created an account field called Primary Contact with a lookup relationship to the contact object. If you add Account as a top-level data set in a mobile configuration, you see two sets of contacts when you add Contact below Account:

- **Contact:** Represents the standard relationship between the account and contact objects.
- **Contact (Referenced by Account):** Represents any object that is the parent in a lookup or master-detail relationship for the selected object. In this case, the contact object is referenced by the Primary Contact field on the account object.

Because Salesforce distinguishes between these two types of relationships, you could, for example, mobilize just the contacts referenced by a custom account field without sending any child contact records to the device.

4. Click **OK**. The data set you created appears in the hierarchy.
5. Optionally, use filters to restrict the records that a parent or child data set includes:
 - a. Use the Filter by Record Ownership options to configure Salesforce to automatically synchronize records based on the owner of the record. The possible options are:
 - **All Records**: Salesforce automatically synchronizes all records the user can access. The **All Records** option is not available for tasks and events when they are parent data sets in a mobile configuration. This helps prevent failed data synchronization due to activity filter queries that take too long to run.
 - **User's Records**: Salesforce automatically synchronizes all records the user owns.
 - **User's Team's Records**: Salesforce automatically synchronizes all records owned by the user and the user's subordinates in the role hierarchy.
 - **User's Account Team's Records**: Salesforce automatically synchronizes accounts for which the user is an account team member, but does not include accounts owned by the user.
 - **User's Opportunity Team's Records**: Salesforce automatically synchronizes opportunities for which the user is an opportunity team member, but does not include opportunities owned by the user.
 - **None (Search Only)**: Salesforce does not automatically synchronize any records for this data set; however, users can use their mobile devices to search all of the records they can access.


Salesforce only displays options that relate to the selected data set. For example, selecting an account data set displays the **User's Account Team's Records** option, while selecting an opportunity data set displays the **User's Opportunity Team's Records** option.

If your mobile needs for an object require a combination of the available record ownership filters, you can add the same object data set up to four times on the same hierarchy level. For example, a sales manager might want to synchronize his opportunities, opportunities owned by his subordinates, and opportunities for which he is an opportunity team member. In this case, you would add an opportunity data set and select **User's Team's Records**, then add a second opportunity data set at the same level in the hierarchy and select **User's Opportunity Team's Records**. Note that objects with only one ownership filter option, such as Case Comment, cannot be added multiple times at the same level of the hierarchy.

- b. Set the filter criteria to automatically synchronize only records that meet specific criteria in addition to the Filter by Record Ownership option you selected. For example, you can set the filter to only include opportunity records with amounts greater than \$50,000, or contact records with the title "Buyer."
- c. To prevent a single data set from consuming all the memory on a mobile device, select the second radio button under Set Max Record Limit and enter the maximum number of records this data set can transfer to mobile devices. Use the Order By and Sort drop-down lists to specify which records are synchronized if the [data size limit](#) is exceeded.

If the limit is reached, Salesforce updates the records currently on the mobile device approximately every 20 minutes, and replaces the records approximately every 24 hours in accordance with the Order By and Sort settings. For example, if the settings are Last Modified Date and Descending, Salesforce transfers the most recently modified records to mobile devices and removes the same number of records that were least recently modified.

If you selected the **None (Search Only)** Filter by Record Ownership option, the limit you set does not apply because no records are automatically synchronized.

 **Tip:** Do not use Set Max Record Limit in place of filters. Only use Set Max Record Limit as a safety mechanism, and use filters as the primary means of limiting the number of records on a mobile device. This ensures that your mobile users receive the correct records on their devices.

Because of the memory restrictions of mobile devices, Salesforce prevents a single query from returning more than 2,500 records.

6. Be sure to [test your mobile configuration](#) to make sure the data does not exceed the total data size limit.
7. Click **Done**.

IN THIS SECTION:

[Merge Fields for Mobile Filter Criteria](#)

[Sample Data Sets](#)

Merge Fields for Mobile Filter Criteria

Some of the \$User merge fields are available when defining filters for mobile configurations and mobile custom views. In mobile configurations, you can use these merge fields to synchronize records where the user is linked to a record but is not the record owner. For example, you can send cases created by the current user to the mobile device, or you can send records to the device where the current user is referenced in a custom field. In mobile views, you can use the merge fields to define view based on the record owner; for example, you might create a view that displays the current user's accounts with a rating of "Hot".

The following table describes the available user merge fields:

Merge Field	Description
<code>\$User.ID</code>	References the ID of the current user. This merge field can be applied to fields that contain a user lookup. The valid operators for this merge field are Equals and Not Equal To. When creating mobile view filters that reference an owner field, you can only use the <code>\$User.ID</code> merge field.
<code>\$User.Username</code>	References the username of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.
<code>\$User.Firstname</code>	References the first name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.
<code>\$User.Lastname</code>	References the last name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions

Merge Field	Description
<code>!User.FullName</code>	References the first and last name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.

Sample Data Sets

Many administrators create mobile configurations based on the functional groups in their organization because users in the same group usually have similar mobile requirements for data. Below are sample data sets for common Salesforce groups. Your mobile users have unique needs, but you can use the examples as a reference to help you get started with mobile configurations.

Sales Manager

Sales managers usually need to see records they own and also the records of their subordinates. They also tend to closely monitor large deals in the pipeline.

This mobile configuration allows sales managers to see:

- The opportunities they own.
- The opportunities owned by users who report to them in the role hierarchy.
- All opportunities scheduled to close in the current quarter with an amount greater than \$100,000.
- All accounts related to the opportunities.
- A subset of their contact and activity records.

Sample Mobile Configuration for Sales Managers

Object	Ownership Filter	Field Filter	Max Records	Order By
Opportunity	User's Team's Records	(Close Date equals THIS QUARTER) AND (Amount greater than "100,000")	No Limit	
Account	All Records		No Limit	
Contact	User's Records		500	Last Activity (Decending)
Task	User's Records	Closed equals False	No Limit	
Event	All Records	Date equals TODAY OR Date equals NEXT 30 DAYS	No Limit	

Sales Engineer

The sales engineer mobile configuration retrieves opportunities owned by the other members of the user's opportunity team, but does not include the user's records. The configuration is opportunity-based because all accounts and contacts sent to the device are related to the opportunities. The sales engineers would see activity history related to the opportunities on the device and also their own activities.

Sample Mobile Configuration for Sales Engineers

Object	Ownership Filter	Field Filter	Max Records	Order By
Opportunity	User's Sales Team's Records	Closed equals False	No Limit	
└─ Account	All Records		No Limit	
└─ Contact	All Records		No Limit	
└─ Task	All Records	Due Date equals LAST 30 DAYS OR Due Date equals NEXT 30 DAYS	No Limit	
└─ Event	All Records	Date equals LAST 30 DAYS OR Date equals NEXT 30 DAYS	No Limit	
Task	User's Records	Closed equals False	No Limit	
Event	User's Records	Date equals TODAY OR Date equals NEXT 30 DAYS	No Limit	

Account Executive

This account executive mobile configuration is account-based, which means the device pulls down the user's accounts and opportunities related to those accounts. The opportunities are filtered so that only open opportunities scheduled to close in the current quarter appear on the device. The Task and Event child data sets retrieve all activities related to those opportunities, not just the user's activities. Only open tasks and events from a two-month window are sent to the device. The Task and Event parent data sets pull down just the user's activities and restrict the activities to open tasks and events scheduled for the next 30 days. The Contact data set delivers the user's contact records, but limits the record count to the 500 most recently active contacts.

Sample Mobile Configuration for Account Executives

Object	Ownership Filter	Field Filter	Max Records	Order By
Account	User's Records		No Limit	
└─ Opportunity	User's Records	(Closed equals False) AND (Close Date equals THIS QUARTER)	No Limit	
└─ Event	All Records	(Date equals LAST 30 DAYS) AND (Date equals NEXT 30 DAYS)	No Limit	
└─ Task	All Records	Due Date equals LAST 30 DAYS OR Due Date equals NEXT 30 DAYS	No Limit	
Contact	User's Records		500	Last Activity (Decending)
Task	User's Records	Closed equals False	No Limit	
Event	User's Records	Date equals TODAY OR Date equals NEXT 30 DAYS	No Limit	

Customer Support Representative

Customer support representatives are focused primarily on cases and solutions. This mobile configuration delivers all open cases to the user's device, along with related accounts, contacts, case comments, case history, tasks, and events. The Case Solution child data set sends all solutions related to the cases, and the Solution data set lets the user search for solutions from the Solutions tab on the device. The support representatives also have access to a subset of their activity records.

Sample Mobile Configuration for Customer Support Representatives

Object	Ownership Filter	Field Filter	Max Records	Order By
Task	All Records	Closed equals False	No Limit	
Event	All Records	Date equals TODAY OR Date equals NEXT 30 DAYS	No Limit	
Case	User's Records	Closed equals False	No Limit	
Task	All Records	Due Date equals LAST 30 DAYS OR Due Date equals NEXT 30 DAYS	No Limit	
Case Comment	All Records		No Limit	
Event	All Records	Date equals LAST 30 DAYS OR Date equals NEXT 30 DAYS	No Limit	
Account	All Records		No Limit	
Contact	All Records		No Limit	
Case History	All Records		No Limit	
Case Solution	All Records		No Limit	
Solution	None (Search Only)		No Limit	

Edit Object Properties for Salesforce Classic Mobile

You can change the properties of standard and custom objects in the Salesforce Classic Mobile app. For example, you can restrict the permissions of Salesforce Classic Mobile users, or you can exclude unnecessary fields from the object's mobile page layout.

Salesforce Classic Mobile object properties are customized per mobile configuration. To edit mobile object properties:

1. From Setup, enter *Salesforce Classic Configurations* in the **Quick Find** box, then select **Salesforce Classic Configurations**.
2. Click the name of the mobile configuration you want to modify.
3. In the Mobile Object Properties related list, click **Edit** next to an object name.

Only objects you mobilized in the configuration's data set appear in the related list. You can't change the properties of the user object.

4. From the Edit Mobile Configuration page, you can:
 - [Remove Mobile Permissions](#)
 - [Customize Salesforce Classic Mobile Page Layouts](#)
5. Click **Save**.

Remove Mobile Permissions

The Salesforce Classic Mobile app inherits the user's permissions from Salesforce. Some administrators want to further restrict the permissions of users when they access Salesforce data in Salesforce Classic Mobile, usually due to limitations of the app or the possibility of user error. For example, users can inadvertently delete a record because they don't realize that deleting a record in Salesforce Classic Mobile also deletes the record in Salesforce. If this is a concern, administrators can prevent users from deleting records in the mobile application, regardless of their standard and custom object permissions in Salesforce. Also, Salesforce Classic Mobile doesn't support all Salesforce features, such

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions

USER PERMISSIONS

To view Salesforce Classic Mobile configurations:


- "View Setup and Configuration"

To edit Salesforce Classic Mobile object properties:

- "Manage Mobile Configurations"

as S-controls and Apex. If your business process for an object is unsupported by Salesforce Classic Mobile, you might choose to prevent mobile users from updating those records in the app.

In the Permissions section, select which permissions to remove from mobile users for this object. Use the **Deny Create**, **Deny Edit**, or **Deny Delete** checkboxes to prevent users from creating, editing, or deleting records in Salesforce Classic Mobile.

 **Note:** Currently, you can't block mobile permissions for the content object.

Customize Salesforce Classic Mobile Page Layouts

The Salesforce Classic Mobile app inherits the user's page layouts from Salesforce. Administrators may want to exclude some fields from each object's mobile page layout because unnecessary fields consume memory and make it harder for users to scroll through pages on the mobile device.


In the Excluded Fields section, select which fields to display on the mobile device for this object. To add or remove fields, select a field name, and click the **Add** or **Remove** arrow.

- Administrators can view all available fields per object, regardless of field-level security.
- Certain fields are required in order for Salesforce Classic Mobile to communicate with Salesforce. Those fields don't display in the Available Fields box because they are mandatory and can't be excluded from mobile page layouts.
- Fields used in custom mobile views can't be excluded from mobile page layouts.
- If you mobilize the content object, all of the content object's fields display in the Available Fields box; however, the layout of the content detail page in the Salesforce Classic Mobile app is hard-coded to show only a few fields. Excluding fields for the content object doesn't affect the page layout in the app.


Assign Tabs to a Salesforce Classic Mobile Configuration

For each mobile configuration, you can select the tabs that appear in the Salesforce Classic Mobile app and define the order of the tabs. The available tabs for a mobile configuration include:

- Standard object tabs
- Custom object tabs
- Visualforce and web tabs that have been enabled for Salesforce Classic Mobile

 **Warning:** Not all websites and Visualforce features are supported on mobile devices. Carefully review the [best practices](#) for creating mobile-friendly pages before enabling Visualforce or web tabs for the Salesforce Classic Mobile app.


By default, tabs work the same in the Salesforce Classic Mobile app as in the full Salesforce site—if an object's tab is hidden in Salesforce, it's hidden in Salesforce Classic Mobile as well.

 **Note:** If you customize mobile tabs, the tabs you select for the mobile configuration are sent to users' mobile devices even if the tabs have not been added to a configuration. Although the tabs are sent to the device, they only display in the Salesforce Classic Mobile app if users have permission to view the tab.

There are several reasons you might want to hide an object's tab in Salesforce Classic Mobile even though the object records are sent to the device. The Salesforce Classic Mobile app has much less screen space to display a row of tabs, so occasionally you might choose to reduce the number of tabs on the device. Also, sometimes a custom object has a relationship to a standard object, and users access the custom object record from the parent object record. In that case, you could mobilize the custom object but hide the tab.

To assign tabs to a mobile configuration:

1. From Setup, enter *Salesforce Classic Configurations* in the Quick Find box, then select **Salesforce Classic Configurations**. Then click the name of a mobile configuration.
2. In the Mobile Tabs related list, click **Customize Tabs** to define mobile tabs for the first time. If you have already set up the mobile tabs, click **Edit**.
3. Select tabs from the *Available Tabs* list, and click the **Add** arrow to add them to the mobile configuration.
4. In the *Selected Tabs* list, choose tabs and click the **Up** and **Down** arrows to arrange the tabs in the order they should appear in the Salesforce Classic Mobile app.
5. Click **Save**.

 **Note:** iPhone users can customize the order of their tabs in the Salesforce Classic Mobile app. If the user customizes their tab order, any administrator changes to the tab order in the mobile configuration are ignored by the app, and any newly mobilized tabs are added below the user's existing tabs.

IN THIS SECTION:

[Enabling Web and Visualforce Tabs for Salesforce Classic Mobile](#)

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions

USER PERMISSIONS

To view Salesforce Classic Mobile configurations:

- "View Setup and Configuration"

To customize Salesforce Classic Mobile tabs:

- "Manage Mobile Configurations"

Enabling Web and Visualforce Tabs for Salesforce Classic Mobile

You can make web and Visualforce tabs available in the Salesforce Classic Mobile app. When you build the web tab or Visualforce tab, edit the tab properties and select the `Salesforce Classic Mobile Ready` checkbox to ensure that the web page or Visualforce page displays and functions properly on a mobile device. Selecting the checkbox adds the tab to the list of available tabs for your Salesforce Classic Mobile mobile configurations.

It is important to note that most mobile browsers have technical limitations concerning display size, scripts, processor speed, and network latency. Review the following considerations before mobilizing your web and Visualforce pages to ensure that they are compatible with mobile browsers.

Mobile Web Tab Considerations

Consider the following when defining a web tab that will be used in the Salesforce Classic Mobile app:

- The ability to mobilize web tabs is only available for iPhone devices. If you mobilize a web tab, keep in mind that Android users can't view the tab in Salesforce Classic Mobile.
- The tab type must be URL. The mobile application can't run S-controls.
- Some web pages contain JavaScript and Flash, but not all mobile browsers support them:
 - Apple's Safari browser supports JavaScript, but not Flash.
- Before mobilizing a web tab, navigate to the target URL on one of your organization's mobile devices to verify that it works as expected in a mobile browser. In the event that your organization's device inventory includes phones with different operating systems—for example, iPhone devices—be sure to test on each type of device. If users can't accomplish the necessary tasks on the web page from a mobile browser, do not mobilize the web tab.

Visualforce Mobile Tab Considerations

Consider the following when defining a mobile Visualforce tab:

- Visualforce Mobile is only available for iPhone. If you mobilize a Visualforce tab, keep in mind that Android users can't view the tab in Salesforce Classic Mobile.
- Because the display size is limited on mobile browsers, we recommend redesigning the Visualforce page to optimize it for mobile users:
 - Set the `sidebar` and `showHeader` attributes on the `<apex:page>` tag to `false`. Phones have small screens and limited processing power, so it is essential that the page suppresses the tab header and sidebar.
 - Set the `standardStylesheets` attribute on the `<apex:page>` tag to `false`. The standard Salesforce style sheet causes pages to load slowly on the device. The best approach to adding a style sheet to your page is to include a `<style>` section just below the `<apex:page>` component.
 - Set the `columns` attribute on the `<apex:pageBlockSection>` component to `1`. There is not enough room on a mobile device's screen to display two columns, so specifying a one-column layout prevents fields from wrapping awkwardly on the page.
- Splash pages don't display in the Salesforce Classic Mobile app.
- In the Salesforce Classic Mobile app, the Visualforce page is embedded in a tab, so you should avoid using tabs for navigation in mobile Visualforce pages.

EDITIONS

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Mobile app available in: **Performance, Unlimited,** and **Developer** Editions, and for an extra cost in: **Professional** and **Enterprise** Editions

- Even if you know that the mobile browser supports the JavaScript in your Visualforce page, keep your use of JavaScript to a minimum. Mobile devices generally have slow network connections, and too many scripts running on a page creates a poor user experience. To minimize the amount of JavaScript on your mobile Visualforce pages, try to build them using mostly HTML.
- All Visualforce pages contain JavaScript, even if you don't create pages that use JavaScript code.
- User agent inspection can be executed in a custom controller to support multiple devices. You can do this by inspecting the appropriate result of the `getHeaders()` method on the current page reference.

Create List Views for Salesforce Classic Mobile

You can create custom list views for Salesforce Classic Mobile users. Custom list views for Salesforce Classic Mobile, also called mobile views, are different from Salesforce custom views in these ways:


- Administrators set up mobile views for each mobile configuration. The views are available to all users assigned to the configuration, and administrators can't restrict visibility to certain groups of users within the configuration. Each mobilized object in a mobile configuration can have up to 10 custom views.
- Users can't filter mobile views by All Records or My Records. The views apply to all records stored locally on the device regardless of ownership; however, ownership filters can be applied using the additional fields in the search criteria.
- Mobile views don't support filter logic.
- Mobile views are limited to a two-column display.
- Users can sort mobile views in ascending or descending order by up to two fields.

For each mobile configuration, you can define up to 10 custom views per object. These views are then pushed to the devices of users assigned to the affected configurations. To create a custom view for Salesforce Classic Mobile:

1. From Setup, enter *Salesforce Classic Configurations* in the Quick Find box, then select **Salesforce Classic Configurations**. Then click the name of a mobile configuration. You might need to [create a mobile configuration](#) if you haven't already.
2. Scroll down to the Mobile Views related list.
3. Choose an object type from the Select an object drop-down list, and then click **New Mobile View**. Only objects included in the mobile configuration's data set appear in the drop-down list. You can't create mobile views for the user object.
4. Enter the view name.

Because display space on mobile devices is limited, the maximum length of a mobile view name is 30 characters.

5. In the Specify Filter Criteria section, enter conditions that the selected items must match; for example, *Amount is greater than \$100,000*.
 - a. Choose a field from the first drop-down list.

 **Note:** You can't create views based on fields you [excluded from mobile page layouts](#) or fields that are [hidden for all profiles and permission sets](#).
 - b. Choose a filter operator.
 - c. In the third field, enter the value to match.

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions

USER PERMISSIONS

To view Salesforce Classic Mobile devices and users:

- "View Setup and Configuration"

To manage Salesforce Classic Mobile custom views:

- "Manage Mobile Configurations"



Warning: Note the following about filter criteria values for mobile views:

- You can use the `$User.ID` merge field as a value in your filter criteria to reference the current user. You can't enter user names in your filter criteria.
- You can only enter special date values in your filter criteria, not actual dates.
- You can't use FISCAL special date values in the filter criteria.

d. Select **Match All** if items in the mobile view should match all the criteria you entered. Select **Match Any** if items in the mobile view should match any of the criteria you entered. Mobile custom views do not support advanced filtering options.

6. In the Select Fields to Display section, select the fields to use as display columns.

The default fields are automatically selected. You can choose up to two different columns of data fields to display in your mobile custom view.

7. In the Define Sort Order section, optionally set a primary and secondary sort order for the view.

- Select a field in the Order By drop-down list. You can sort by fields that have been excluded from the object's mobile page layout.
- Set the sort order to Ascending or Descending.

8. Click **Save**.

Set Up The Mobile Dashboards for iPad App



Important: As of Summer '15, the Mobile Dashboards for iPad app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce1 app, the new Salesforce mobile experience.

You can make the Dashboards tab available in Salesforce Classic Mobile by adding it to the tabs for a [mobile configuration](#). Mobile dashboards allow field users to keep up with corporate metrics and key performance indicators even when they are away from their desks.

Note the following about mobile dashboards:

- The Dashboards tab in the mobile application launches an embedded browser to display the dashboards.
- Due to screen size limitations, mobile dashboards display in a single column.
- Links to custom report details are disabled in mobile dashboards.
- The first time a user visits the Dashboards tab in Salesforce Classic Mobile, the mobile application requests the last dashboard the user viewed in Salesforce. Depending on the strength of the cellular or WiFi signal, it could take several minutes before the dashboard displays on the page.
- Dashboards do not automatically refresh in the mobile application. Users can request a dashboard refresh by clicking the **Refresh** button.
- Users are able to work offline in the mobile application. Without a wireless connection, users can see the last viewed dashboard, but they cannot refresh the dashboard or select a different one.
- The minimum BlackBerry operating system requirement for mobile dashboards is 4.5. Mobile dashboards are compatible with version 4.3, but tables in the dashboards might not display properly.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS


To view mobile configurations:

- "View Setup and Configuration"

To mobilize dashboards:


- "Manage Mobile Configurations"

- BlackBerry administrators should be aware that the download size setting on the BlackBerry Enterprise Server affects how much dashboard data can be pushed to the device. Check that the download size setting is appropriate, and be sure to test your dashboards before deploying them to your mobile users.

 **Note:** Currently, dashboards are only available in the BlackBerry and iPhone mobile client applications.

To enable mobile dashboards:

1. From Setup, enter *Mobile Dashboards* in the *Quick Find* box, then select **Mobile Dashboard Settings**. Then click the name of a mobile configuration.
2. In the Mobile Tabs related list, click **Customize Tabs** to define mobile tabs for the first time. If you have already set up the mobile tabs, click **Edit**.
3. Select **Dashboards** from the Available Tabs list, and click the **Add** arrow to add it to the mobile configuration. The Available Tabs list includes standard object tabs and custom object tabs. It can also include web and Visualforce tabs.

 **Warning:** If you have not yet customized tabs in the mobile configuration, you must select all the tabs that should appear in the mobile application, not just the Dashboards tab.

4. In the Selected Tabs list, choose the Dashboards tab and click the **Up** and **Down** arrows to define where the Dashboards tab should appear in the mobile application.
5. Click **Save**.

Enable Reports in Salesforce Classic Mobile

To enable reports in the Salesforce Classic Mobile app:

1. Create a Mobile Reports folder in Salesforce. From the reports home page in the full site, click **Create New Folder**.

2. In the *Report Folder* field, enter: *Mobile Reports*.

The server won't load reports on mobile devices unless this folder is named *Mobile Reports*. Be sure to check for any typos in the name before saving the folder. Additionally, Salesforce doesn't require folder names to be unique. Salesforce Classic Mobile users can see any report stored in all folders named *Mobile Reports* unless you restrict access with the folder visibility option.

3. Choose a *Public Folder Access* option. This option doesn't affect the ability of mobile users to run reports.
4. Optionally, select any unfiled reports and click **Add** to store them in the Mobile Reports folder. You can also add reports to the folder after saving the folder.
5. Choose a folder visibility option.

- *This folder is accessible by all users* gives every user in your organization the ability to see the list of mobile reports from their devices.
- *This folder is accessible only by the following users* lets you grant access to a desired set of users.

Don't make the *Mobile Reports* folder private unless you want to hide mobile reports from all users, including yourself.

6. Click **Save**.

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional** and **Enterprise** Editions

USER PERMISSIONS

To create, edit, and delete public report folders:

- "Manage Public Reports"


To view Salesforce Classic Mobile configurations:

- "View Setup and Configuration"

7. Add reports to the Mobile Reports folder. Click the report name on the reports home page, then click **Save As** and save the report in the Mobile Reports folder.

After saving the report, you can edit the options to make the report easier to view on a mobile device. For example, you might reduce the number of columns or enter additional filtering criteria.

8. Add the Reports tab to your mobile configurations. From Setup, enter *Salesforce Classic Configurations* in the Quick Find box, then select **Salesforce Classic Configurations**. Then click the name of a mobile configuration.
9. In the Mobile Tabs related list, click **Customize Tabs** to define mobile tabs for the first time. If you've already set up the mobile tabs, click **Edit**.
10. Select **Reports** from the Available Tabs list, then click the **Add** arrow to add it to the mobile configuration. The Available Tabs list includes standard object tabs and custom object tabs. It can also include web and Visualforce tabs.

 **Warning:** If you have not yet customized tabs in the mobile configuration, you must select all the tabs that should appear in the Salesforce Classic Mobile, not just the Reports tab.

11. In the Selected Tabs list, choose the Reports tab and click the **Up** and **Down** arrows to define where the Reports tab should appear in the Salesforce Classic Mobile app.

12. Click **Save**.

 **Note:** Currently, reports in Salesforce Classic Mobile aren't available on Android or iPhone devices.

Salesforce Classic Mobile Usage Data in Custom Report Types

You can create custom report types with data that shows how your organization uses Salesforce Classic Mobile. For example, the reports can show how often users access Salesforce Classic Mobile, which mobile device models they use, and so forth.

To create a custom report type with Salesforce Classic Mobile usage data, select the Mobile Session `Primary Object` when defining a custom report type. When you select the fields for the custom report type, choose from the following Salesforce Classic Mobile-specific fields.

Mobile Usage Data Point	Definition
Brand	Wireless carrier
Data Size (Bytes)	Total size of records on device
Device Address	Unique physical address of device (UDID for iOS)
Device Application Version	Installed version of Salesforce Classic Mobile
Device Model	Model of device
Device Operating System Version	Version of operating system installed on device
Duration	Duration of the mobile session in seconds
Last Registration Date	Date of last registration or activation
Last Status Date	Date of last communication received from device
Manufacturer	Manufacturer of device

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions

USER PERMISSIONS

To create or update custom report types:

- "Manage Custom Report Types"

To delete custom report types:

- "Modify All Data"

Metadata Size (Bytes)	Size of metadata (page layouts, picklist values, and so forth) on the device
Owner: Full Name	Name of the device user
Session Start Date	Date the mobile session started
Status	Indicator that the user's data set exceeds the maximum allowed size by the mobile configuration

 **Note:**

- Mobile sessions are similar to Web-based sessions in login history reports; however, mobile sessions have a fixed timeout value of 20 minutes. Salesforce creates a new Mobile Session when a user logs into or launches Salesforce Classic Mobile after 20 minutes of inactivity in the app or on the device in general.
- Mobile session reports only have usage data for the Salesforce Classic Mobile app and not other Salesforce mobile apps, such as the Salesforce 1 apps.
- Some devices do not provide every physical attribute. For example, Apple devices do not provide brand.

Setting Up Salesforce CRM Content for Salesforce Classic Mobile

Note the following about how Salesforce CRM Content is implemented in Salesforce Classic Mobile:

- Content record information is synchronized to the device; however, the files associated with the content records are not. This allows users to deliver content from the app even when a file is too large to be downloaded to a mobile device.
- Users can't search for a specific piece of content in the app. They can only share the content available on the Content tab, which is automatically synchronized to their device based on the filters in their assigned mobile configuration.
- Users can't view a list of their subscribed content in the app. They also can't filter the list of records on the Content tab based on a particular library.
- While users can preview and share content from the app, they can't update the file associated with a content record. If they have the required permissions, they can edit the fields on the content detail page.
- Users must have a data connection to preview and deliver content. Without a data connection, they can only view the content detail page.
- Content in Salesforce Classic Mobile is only supported on iPhone devices.
- You can't block mobile permissions for the content object. Currently, the content object in Salesforce Classic Mobile is read-only.
- You can't edit the mobile page layout for the content object. The content detail page in the app is hard-coded to display only a few fields.

To set up Content for a Salesforce Classic Mobile configuration:

1. From Setup, enter *Salesforce Classic Configurations* in the Quick Find box, then select **Salesforce Classic Configurations**, and then click the name of a mobile configuration.
2. In the Data Sets related list, click **Edit**.

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in:

Performance, Unlimited, and Developer Editions, and for an extra cost in: **Professional and Enterprise** Editions

USER PERMISSIONS

To view Salesforce Classic Mobile configurations:

- "View Setup and Configuration"

To create, change, or delete Salesforce Classic Mobile data sets:

- "Manage Mobile Configurations"

3. Click **Add...**
4. In the popup window, select Content, then click **OK**.
5. Use field filters to specify which content records are synchronized.

Because users can't search for content in the Salesforce Classic Mobile app, it's essential to set up filters that make important content available on the device. You can't create filters based on libraries or subscriptions, but here are a few options for setting up useful filter conditions:

- **Date:** Filter on the `Last Modified Date`, `Content Modified Date`, or `Created Date` fields. Use special date values like `LAST 90 DAYS` or `LAST 180 DAYS` to ensure that recently updated content records are synchronized.
 - **Owner:** Filter on the author if certain people in your organization are responsible for publishing content.
 - **File Type:** Filter on certain types of documents. For example, your opportunity team might generally be interested in presentations or PDF documents.
 - **Custom Fields:** If you created custom content fields that help you categorize your content, filter on the custom fields. For example, if you built a `Functional Use` field with picklist values, you could set up a filter condition where `Functional Use` equals `Sales`.
6. Optionally, prevent content records from consuming all the memory on a mobile device by selecting the second radio button under Set Max Record Limit and entering the maximum number of content records this configuration can transfer to mobile devices. Use the Order By and Sort drop-down lists to specify which records are synchronized if the data size limit for your mobile configuration is exceeded.
 7. Click **Done**.

Create Links to Web and Visualforce Mobile Pages for Salesforce Classic Mobile

To improve the integration between the Salesforce Classic Mobile app, Visualforce Mobile, and external websites, you can optionally create links from native Salesforce records to Visualforce Mobile pages or external websites. To create the links, build text formula fields on a standard or custom object. The field must be visible on the page layout to appear in the Salesforce Classic Mobile app. The best practice is to include all embedded links in a separate section labeled "Mobile Links" at the bottom of the page layout. There is currently no way to hide these links in Salesforce, but users can collapse the section to keep the links out of the way.

1. Navigate to the fields area of the appropriate object.
2. Click **New** in the fields section of the page.
3. Select `Formula`, and then click **Next**.
4. Enter the field label.
The field name is automatically populated based on the field label you enter.
5. Select `Text`, then click **Next**.
6. In the formula editor, create the link to the custom Visualforce page or external website:
 - To create a Visualforce link, type `"visualforce:///apex/PageName"`, and replace `PageName` with the name of your Visualforce page. You can append parameters to the string, such as `?contactid=" & Id"`, in order to pass information from the record in the client application to the Visualforce page.

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in:
Performance, Unlimited,
and **Developer** Editions, and
for an extra cost in:
Professional and **Enterprise**
Editions


USER PERMISSIONS

To create or change custom buttons or links:

- "Customize Application"

- To create a Web link, type `"weblink:"`, followed by the URL to which you want the link to point, such as `"weblink:http://www.salesforce.com"`. You can append parameters to the string in order to pass information from the record in the client application to the Web page. For example, the following Web link launches a social networking site from a contact record and performs a search for the contact:

```
"weblink:http://m.linkedin.com/members?search_term=" &FirstName& "+" &LastName& "&filter=name&commit=Search"
```

-  **Note:** The client application passes the Visualforce or Web link with all parameters to the embedded browser. It is up to the website or Visualforce Mobile page to interpret any parameters. Be sure to construct your Visualforce Mobile page to consume any parameters passed in the link.

7. Click **Next**.
8. Set the field-level security to determine whether the field should be visible or read only for specific profiles, and click **Next**.
9. Choose the page layouts that should display the field. In the next step, you will customize the layout to change the location of the field on the page.
10. Save your changes.
11. Edit the object's page layout. From the management settings for the object whose page layout you want to change, go to Page Layouts.
12. Drag a Section element from the palette to the page layout and drop it below the existing sections.
13. In the Section Name field, type *Mobile Links*.
14. Deselect the Edit Page option.
15. Select the 1-column layout, then click **OK**.
16. Drag the new text formula field from its current location into the new Mobile Links section.
17. Save your changes.

SEE ALSO:

[Salesforce Help: Find Object Management Settings](#)

Notifying Users about Salesforce Classic Mobile Availability

When you're ready to deploy the Salesforce Classic Mobile app to your users, send them an email to notify them about the availability of the app and provide installation instructions. You can send the email using your corporate email application, like Outlook, or you can send mass email from Salesforce. Either way, include the URL that launches the download.

- For Android users, the download URL is `mobile.salesforce.com`. The link is the same for the initial download and for subsequent upgrades.
- You can obtain the iPhone download URL from iTunes. Open iTunes, click **iTunes Store**, then search for Salesforce Classic Mobile. Click the app icon to view details about the app. At the top of the iTunes window is a bread crumb path representing the application's location in the App Store: **App Store > Business > Salesforce Classic Mobile**. Drag-and-drop the path into a text editor or word processing program to display the app's download URL.

To send mass email to Salesforce Classic Mobile users from Salesforce:

1. Create an email template that informs users about the availability of Salesforce Classic Mobile. From your personal settings, enter *Templates* in the *Quick Find* box, and select either **My Templates** or **Email Templates**—whichever one appears. Optionally, you can also create a separate email template for upgrade notifications. Include the download link in the templates.
2. Create a custom view on the Mass Email page that shows your Salesforce Classic Mobile users only.
3. Send mass email to your Salesforce Classic Mobile users, using the custom view that you created. From Setup, enter *Mass Email Users* in the *Quick Find* box, then select **Mass Email Users**.

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional** and **Enterprise** Editions

USER PERMISSIONS

To create HTML email templates:

- "Edit HTML Templates"

To send mass emails to users:

- "Mass Email"
- AND
- "Manage Users"

Manage Salesforce Classic Mobile Configurations

To manage your Salesforce Classic Mobile configurations, from Setup, enter *Salesforce Classic Configurations* in the Quick Find box, then select **Salesforce Classic Configurations**.

- To [define a new mobile configuration](#), click **New Mobile Configuration**.
- To modify a mobile configuration—including assigning different users or profiles and changing the maximum size of data sets—click **Edit**.
- To activate a mobile configuration, click **Edit**, select the **Active** checkbox, then click **Save**. Deselect **Active** to deactivate the mobile configuration.
- To delete a mobile configuration, click **Del**.
- To view details about a mobile configuration, click its name.

From a mobile configuration detail page, you can:

- [Modify data sets for a mobile configuration](#) by clicking **Edit** in the Data Sets related list.
- [Change the properties of mobilized objects](#) by clicking **Edit** next to an object name in the Mobile Object Properties related list.
- [Customize mobile configuration tabs](#) by clicking **Edit** in the Mobile Tabs related list.
- [Create custom views for a mobile configuration](#) by clicking **Edit** in the Mobile Views related list.
- Clone the mobile configuration by clicking **Clone**.

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions

USER PERMISSIONS

To view Salesforce Classic Mobile configurations:

- “View Setup and Configuration”

To create, change, or delete Salesforce Classic Mobile configurations:

- “Manage Mobile Configurations”

Manage Salesforce Classic Mobile Tabs

To manage the tabs for a Salesforce Classic Mobile configuration, from Setup, enter *Salesforce Classic Configurations* in the Quick Find box, then select **Salesforce Classic Configurations**. Then click the name of the mobile configuration and scroll down to the Mobile Tabs related list.

If you've already customized the configuration's tabs, the Mobile Tabs related list shows the selected tabs.

- To change the tab setup, click **Edit**.
- To delete the mobile tab setup and use the default tab behavior instead, click **Reset to Default**.

If you haven't customized the configuration's tabs, the related list indicates that the default tab behavior is used for the configuration. To [customize the tabs used by the configuration and define their order](#), click **Customize Tabs**.

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions

USER PERMISSIONS

To view Salesforce Classic Mobile configurations:

- "View Setup and Configuration"

To manage Salesforce Classic Mobile tabs:

- "Manage Mobile Configurations"


Manage Salesforce Classic Mobile Devices

After a user installs the Salesforce Classic Mobile app on a mobile device and logs in for the first time, Salesforce collects information about the device and associates it with the user's record. The device information is read only.

Although the device entry is created automatically, you can still view and manage all the mobile users and devices in your organization from Setup by entering *Users and Devices* in the **Quick Find** box, then selecting **Users and Devices**.

From the All Mobile Users and Devices page, you can:

- View the list of users in your organization who have been enabled to use Salesforce Classic Mobile.
- Create custom list views to see different subsets of your mobile users. For example, create a view that shows the users who have never logged in to Salesforce from the Salesforce Classic Mobile app to evaluate the effectiveness of your organization's Salesforce Classic Mobile deployment efforts.
- [View details about a mobile device](#) by clicking the device address.
- View details about a specific user by clicking the username.
- View details about a mobile configuration by clicking the mobile configuration name.
- Perform these actions on multiple users at the same time:
 - [Adjust the mobile session timeout value](#)
 - [Erase the Salesforce data from a user's mobile device](#)
 - [Delete a mobile device from a user's record](#)
- Find out why a user's device isn't synchronizing by hovering your mouse over the red error icon in the Status column. Additional information about the synchronization errors appears on the device's detail page.

 **Note:** You can also manage mobile users from the Assigned Mobile Devices related list on the user detail page.

IN THIS SECTION:

[Viewing Salesforce Classic Mobile Device Information](#)

[Permanently Link Salesforce Classic Mobile Users to a Mobile Device](#)

You can prevent mobile users from registering any mobile device other than the one they used for their initial Salesforce Classic Mobile activation.

[Set Salesforce Classic Mobile Session Timeout Values](#)

[Erasing Data in Salesforce Classic Mobile](#)

[Deleting Mobile Devices](#)

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions

USER PERMISSIONS

To view Salesforce Classic Mobile devices and users:

- "View Setup and Configuration"

To manage Salesforce Classic Mobile devices:

- "Manage Mobile Configurations"

Viewing Salesforce Classic Mobile Device Information

Salesforce collects information about a mobile user's device the first time the user logs in to the Salesforce Classic Mobile app. There are two ways to access the device details.

- From Setup, enter *Users and Devices* in the **Quick Find** box, then select **Users and Devices**. Then click a device address in the list view.
- From Setup, enter *Users* in the **Quick Find** box, then select **Users**. Click **Edit** next to a user's name, and then click the device address in the Assigned Mobile Devices related list.

From the Mobile Device page, you can:

- Review device information
- [Adjust the mobile session timeout value](#)
- [Erase the Salesforce data from a user's device](#)
- [Delete a device from a user's record](#)

Below is a description of the fields in alphabetical order that are stored for each mobile device in your organization.

Field	Description
Brand	The brand of the mobile device, if available.
Carrier	The name of the carrier providing service for the mobile device, if available.
Connected Since	The date and time the device established a connection to the mobile server. The device loses a connection when the battery dies or when the session is closed because the server has not received data from the device for a long period of time.
Connection Status	The state of the device connection. Possible values for this field are Connected, Not Connected, and Not Available.
Created By	The name of the first user who registered the mobile device and the time and date the registration occurred.
Data Size	The size of the Salesforce data currently stored on the user's mobile device. The mobile device periodically sends this information to Salesforce, which is helpful when troubleshooting synchronization errors resulting from an exceeded data limit .
Device Address	The unique identifier of the user's mobile device.
Device Model	The model of the mobile device.
Is Simulator?	A flag indicating whether the device is a simulator or a mobile device. A simulator is a

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited,** and **Developer** Editions, and for an extra cost in: **Professional** and **Enterprise** Editions

USER PERMISSIONS

To view Salesforce Classic Mobile devices and users:


- "View Setup and Configuration"

To manage Salesforce Classic Mobile devices:

- "Manage Mobile Configurations"

Field	Description
	software application that emulates the behavior of a mobile device.
Last Activated	The last time a full data set was downloaded to the mobile device. If a user's data set exceeds the limit defined in the assigned mobile configuration, the device can be registered but not activated.
Last Data Received	The last time data was received from the device. This information is helpful for troubleshooting connection issues.
Last Registration	The last time a user registered the mobile device. The registration process creates the device record in Salesforce and associates it with the user who registered it.
Last Status Date	The last time the mobile device notified Salesforce that the device is no longer synchronizing data due to an error. The Last Status Date field is only visible when an error is present.
Manufacturer	The manufacturer of the mobile device.
Metadata Size	The size of the Salesforce metadata currently stored on the user's mobile device. Metadata consists of page layout and schema information, and the amount of metadata sent to a device can be very high depending on the size of your organization and the complexity of its setup.
Modified By	The name of the last user who registered the mobile device and the time and date the registration occurred.
Number of Pending Outgoing Messages	The number of messages queued on the mobile server waiting to be sent to the device.
Operating System	The type of operating system installed on the mobile device: Android or iPhone.
Operating System Version	The version number of the operating system installed on the mobile device.
Phone Number	The phone number associated with the mobile device.
Salesforce Classic Mobile Version	The version number and build number of the mobile client application installed on the device.
Size of Pending Outgoing Messages (Bytes)	The total data size of the messages queued on the device waiting to be sent to the mobile server. Because the server processes messages almost instantaneously, this value is usually 0.
Size of Outgoing Messages (Bytes)	The total data size of the outbound message queue on the mobile server.
Status	Indicates whether any synchronization errors exist between the device and Salesforce. The Status field is only visible when an error is present. The two error statuses are Data Limit Exceeded and Unknown Error.

Field	Description
Username	The Salesforce username of the user who is associated with the mobile device.

 **Note:** If Salesforce detects the selected device was registered by a user in another organization, an error displays on the device detail page. This can happen when a device was registered to a user in your sandbox organization and then later activated by a user in your production organization. To remove the old device record from your organization, simply [delete the device](#).


Permanently Link Salesforce Classic Mobile Users to a Mobile Device

You can prevent mobile users from registering any mobile device other than the one they used for their initial Salesforce Classic Mobile activation.

By default, Salesforce automatically associates a device record with the mobile user who most recently activated the device, so administrators don't need to update the device record to assign the device to another user. While this behavior makes it easy to switch devices between users in your organization, some administrators prefer that users are permanently linked to the devices they were originally assigned. This helps administrators of organizations with highly sensitive data ensure that their users do not access corporate data from personal devices.

To permanently link a user to a mobile device:

1. From Setup, enter *Salesforce Classic Settings* in the **Quick Find** box, then select **Salesforce Classic Settings**.
2. Click **Edit**.
3. Select **Permanently Link User to Mobile Device**.
4. Click **Save**.

 **Warning:** Enabling the **Permanently Link User to Mobile Device** setting requires administrative action when users need to switch devices. You must manually [delete the existing device](#) from a user's record in order for the user to register a different device. If you don't delete the device, the user won't be able to access the Salesforce Classic Mobile app.

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional and Enterprise** Editions

USER PERMISSIONS

To view Salesforce Classic Mobile settings:

- "View Setup and Configuration"

To change Salesforce Classic Mobile settings:

- "Manage Mobile Configurations"

Set Salesforce Classic Mobile Session Timeout Values

For security reasons, the Salesforce Classic Mobile app is set to lock out users after 10 minutes of inactivity. Administrators can adjust or disable this setting on a device-by-device basis. For example, you might disable the Salesforce Classic Mobile timeout setting if a mobile device's operating system has its own locking mechanism.

To change the Salesforce Classic Mobile session timeout value:

1. Navigate to one of these pages.
 - To deal with multiple devices at the same time, from Setup, enter *Users and Devices* in the **Quick Find** box, then select **Users and Devices**. In the list view on the Mobile Users and Devices page, select the desired devices.
 - To deal with a specific device, from Setup, enter *Users* in the **Quick Find** box, then select **Users**. Click a user's name, then click the device address in the Assigned Mobile Devices related list to see the Mobile Device page.
2. Click **Set Mobile Session Timeout**.
3. Choose the new timeout value in minutes. You can also choose **Never Expire** if users shouldn't be locked out of the app.
4. Click **Save**.
Salesforce attempts to send a message containing the new session timeout setting to the selected mobile devices.
5. A confirmation page [summarizes the results](#) for each mobile device you selected.

Mobile Session Timeout Results

After Salesforce sends the new session timeout session to the selected mobile devices, a results page provides information about the status of each message. The table below describes the three possible outcomes:

Result	Description
Message successfully queued	The Salesforce Classic Mobile server has sent the message to the device. Salesforce can't detect if the message was received by the device.
Unable to send message	A temporary communication problem between Salesforce and the Salesforce Classic Mobile server prevented the message from being sent. Try again later.
User has no mobile device	The selected mobile user never registered a device, so therefore the message could not be sent.

EDITIONS

Salesforce Classic Mobile setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited,** and **Developer** Editions, and for an extra cost in: **Professional** and **Enterprise** Editions

USER PERMISSIONS

To set Salesforce Classic Mobile session timeout values:

- "Manage Mobile Configurations"

Erasing Data in Salesforce Classic Mobile

When a user accesses the Salesforce Classic Mobile app, the user's mobile device contains both the mobile app and a set of the user's Salesforce data. An administrator can remove the data from a device without uninstalling the mobile app. This is an effective security tool when a user misplaces his or her device. You also must erase a device's data if you plan to give it to another user.

To erase the Salesforce data on one or more mobile devices:

1. Navigate to one of these pages.
 - To deal with multiple devices at the same time, from Setup, enter *Users and Devices* in the **Quick Find** box, then select **Users and Devices**. In the list view on the Mobile Users and Devices page, select the desired devices.
 - To deal with a specific device, from Setup, enter *Users* in the **Quick Find** box, then select **Users**. Click a user's name, then click the device address in the Assigned Mobile Devices related list to see the Mobile Device page.
2. Click **Erase Data**, then click **OK**.
Salesforce attempts to send a message to the mobile devices to erase the data.

Erase Data Results

After Salesforce sends the message to the mobile devices to erase data, a results page provides information about the status of each message. The table below describes the three possible outcomes:

Result	Description
Message successfully queued	The Salesforce Classic Mobile server has sent the message to the device. Salesforce can't detect if the message was received by the device.
Unable to send message	A temporary communication problem between Salesforce and the Salesforce Classic Mobile server prevented the message from being sent. Try again later.
User has no mobile device	The selected mobile user never registered a device, so therefore the message could not be sent.

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USER PERMISSIONS

To delete the Salesforce data on a device running Salesforce Classic Mobile:

- "Manage Mobile Configurations"

Deleting Mobile Devices

There are two instances when you would delete a mobile device from a user's record:

- Your organization's mobile settings permanently link mobile users to their devices, and you need to assign a device to a different user. If you did not enable this setting, Salesforce automatically associates a device record with the mobile user who most recently activated the device, so it is unnecessary to delete a device to assign it to another user.
- You want to move a device from your sandbox organization to your production organization.

To delete a mobile device:

1. Navigate to one of these pages.
 - To deal with multiple devices at the same time, from Setup, enter *Users and Devices* in the **Quick Find** box, then select **Users and Devices**. In the list view on the Mobile Users and Devices page, select the desired devices.
 - To deal with a specific device, from Setup, enter *Users* in the **Quick Find** box, then select **Users**. Click a user's name, then click the device address in the Assigned Mobile Devices related list to see the Mobile Device page.
2. On the Mobile Devices and Users page, select one or more devices, then click **Delete Device**. On the Mobile Device page, click **Delete**.
3. Click **OK**.
Salesforce attempts to delete the selected device(s).
4. A confirmation page [summarizes the results](#) for each mobile device you selected.

Delete Device Results

After Salesforce sends the message to the mobile server to delete the devices, a results page provides information about the status of each device. The table below describes the three possible outcomes:

Result	Description
Device deleted.	Salesforce removed the device record from your organization.
Device cannot be deleted at this time. Please try again later.	A temporary communication problem between Salesforce and the mobile server prevented the device from being deleted. Try again later.
User has no mobile device.	The selected mobile user never registered a device, so therefore the message could not be sent.

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USER PERMISSIONS

To view mobile devices and users:

- "View Setup and Configuration"

To delete mobile devices:

- "Manage Mobile Configurations"

CHAPTER 4 Installing the Mobile Client Application

In this chapter ...

- [Installing Salesforce Classic Mobile](#)
- [Mobile Device Simulators](#)

After planning and mobile administration are complete, you can deploy Salesforce Classic Mobile to your users. The mobile client application is installed over-the-air. Any user can complete the process by following the detailed installation messages on their mobile device. The time required for installation depends on several factors, including device characteristics, wireless signal strength, and the amount of Salesforce data being delivered to the device. Because of these varying factors, some time should be set aside to complete the process. While the use of Salesforce Classic Mobile does not depend on wireless coverage, the actual installation process requires a strong wireless signal.

Installing Salesforce Classic Mobile

You can install the Salesforce Classic Mobile app on any supported iPhone smartphone.

iPhone Installation

Salesforce Classic 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 network. You also need an iTunes™ Store account to download applications. If you don't already have an iTunes Store account, open iTunes on your computer and select **Store > Account** to set one up.

To install Salesforce Classic Mobile from [the App Store](#):

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



Note: There's no charge to download the app from the App Store. But only users in Enterprise, Professional, Unlimited, Performance, or Developer Editions who've been assigned a mobile license can run Salesforce Classic Mobile.

6. Enter your iTunes Store account and password and tap **OK**.
7. The first time you launch Salesforce Classic Mobile, you must activate the app for your device by logging in and downloading data. Verify that your device is connected to a network.
 - a. Tap the Salesforce icon on the Home screen.
 - b. Tap **I Accept**.
 - c. On the activation screen, enter your Salesforce username and password.
 - d. Tap **Activate**.



Warning: If the application closes or the device locks during the activation process, the iPhone operating system pauses the download process but it will resume the next time you open the app.

Activating a Sandbox Account in Salesforce Classic Mobile

By default, the mobile client application connects to the transport for your production organization; however, you might want to test your mobile configurations in your sandbox before deploying Salesforce Classic Mobile to your production organization. In order to activate a sandbox account from a mobile device, you must configure the mobile client application for the sandbox transport. To activate a sandbox account:

- For iPhone and iPod touch devices, tap **Settings** on the device's Home screen, then scroll down and tap **Salesforce**. Tap **Transport URL**, then tap **Sandbox**. Tap the back arrow twice to exit the Settings page. Open Salesforce Classic Mobile. Enter the username and password for your sandbox account, then tap **Activate**.


To activate a production account after using a sandbox account, follow the same steps, but select **Production** as the Transport URL.

Mobile Device Simulators

Whether you're an administrator who wants to test a complex mobile configuration or a Force.com developer who wants to test a mobile application, it's a good idea to verify that Salesforce Classic Mobile works as expected before deploying to users. If you don't have a device that meets the [Salesforce Classic Mobile device requirements](#), you can run the mobile application on an iPhone simulator.

A device simulator is a program you run on your computer that mimics the operating system, screen, keyboard, and navigation of a mobile device. You can use device simulators for testing, and they are also helpful tools for training and giving demonstrations. You can run Salesforce Classic Mobile on the following device simulators:

- iPhone

 **Warning:** Although you can run Salesforce Classic Mobile on iPhone simulators, Salesforce does not manufacture or support the simulators. If you have installation problems or experience technical issues while using a simulator, contact the simulator's publisher.


- Contact [Apple](#) for issues with the iPhone simulator.

iPhone Simulator

The iPhone simulator application is published by Apple as part of the iPhone SDK, and the simulator is available only for the most recent release of the Macintosh operating system (10.5.x) running on Macintosh computers with Intel processors. Salesforce provides the simulator version of Salesforce Classic Mobile as an update to the standard iPhone simulator.

To set up the iPhone simulator:


1. Visit the Apple iPhone development page at <http://developer.apple.com/iphone>.
2. Download the latest version of the iPhone SDK.

 **Note:** You must be a registered iPhone developer to download the iPhone SDK. You can sign up for free at the Apple iPhone development page.

3. Double-click the DMG file to launch the installer for the iPhone SDK.
4. During the installation, make sure that the **iPhone SDK** checkbox is selected. If the checkbox is not selectable, you are running an incompatible version of the Macintosh operating system. Use Software Update to get the latest update of the operating system.
5. Verify that the installation was successful by running the iPhone simulator.

The path to the simulator application in Finder is `Macintosh HD/Developer/Platforms/iPhoneSimulator.platform/Developer/Applications/iPhone Simulator`. Drag-and-drop the simulator icon to the dock for fast access to the application.

6. Quit the simulator if it's running.
7. Navigate to the following URL: <http://downloads.salesforce.com/downloads/mobile/index.html>.
8. Under iPhone, click **Simulator Updater**.
9. Save the `SalesforceiPhoneSimulator.dmg` file.
10. Open the downloaded DMG file.
11. Copy the Download Salesforce for iPhone Simulator application to your Applications folder.
12. Double-click to launch the Download Salesforce for iPhone Simulator application from your Applications folder.
13. Launch the iPhone simulator from your dock. You can also run it using the following path in Finder: `Macintosh HD/Developer/Platforms/iPhoneSimulator.platform/Developer/Applications/iPhone Simulator`.

14. Click the Salesforce icon on the Home screen.
15. Click **I Accept**.
16. On the activation screen, enter your Salesforce username and password. Click **Done** to close the keyboard.
17. Click **Activate**.
 -  **Warning:** 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.
18. When prompted, create your five-digit passcode. You must use a passcode—which is different than your Salesforce password—to access the mobile application after it locks due to inactivity.
19. Enter your passcode again for confirmation.

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