

Release Notes

AppExchange Mobile 6.0

Last Update: November 16, 2006
©Copyright 2004-2006 salesforce.com, inc. All rights reserved.
Various trademarks held by their respective owners.

Table of Contents

About the Release Notes	1
Integrated Mobile Administration Console	1
About Integrated Mobile Administration Console	1
Install the AppExchange Mobile Console	3
Access the AppExchange Mobile Console	3
Add a User	3
Change a User's Role	4
Import New Mobile Users	4
Device Info Auto Discovery	6
About Device Info Auto Discovery	6
Enable Device Info Auto Discovery	7
Mobile Trials	8
About Mobile Trials	8
Convert a Trial Account to an Active Account	8
Additional Enhancements – RIM BlackBerry Platform	9
Tab Names	9
Battery Life Enhancements	9
Task List Views	9
Text Area Formatting	9
Device Certification	9
Additional Enhancements – Palm Treo Platform	9
Calendar UI	9
Change Record Ownership	10
Combo Picklist Default Values	10
Text Area Formatting	10
Logged Emails	10

ABOUT THE RELEASE NOTES

The Release Notes are a comprehensive user guide for the latest release of the AppExchange Mobile application. Unlike a traditional release notes document that includes only a simple list of enhancements and known bugs, the AppExchange Mobile Release Notes give you everything you need to get and up and running with the new features and functionality in the latest release.

What's Included in the Release Notes

For every new piece of major functionality, the Release Notes provide:

- A brief, high-level description of the functionality
- Implementation tips to help you get started with setup and administration
- Complete end-to-end instructions on how to set up and use the functionality

Beyond the major new features, the Additional Enhancements sections include a list and brief description of every other enhancement or functionality change included in the latest release.

Let the Release Notes be your guide to success with the latest release from AppExchange Mobile!

INTEGRATED MOBILE ADMINISTRATION CONSOLE

Mobile Administrators can now manage all aspects of their mobile deployments from within their salesforce.com organization. Specifically, mobile Administrators can install a private AppExchange package to manage mobile users, mobile profiles, and devices. Administrators may access the Console via single sign-on without having to authenticate.

About Integrated Mobile Administration Console

In an ongoing attempt to streamline the mobile services previously delivered by Sendia, we are shifting to a common definition of a user. Mobile 6.0 will impact the way you manage your mobile users and Console administrators. The major changes to user and administrator maintenance are outlined below.

Major Changes

- Salesforce.com administrators can install and deploy the AppExchange Mobile Administration Console package, which allows Console administrators to access the Console from a tab in the salesforce.com application. This package offers seamless integration between AppExchange Mobile and salesforce.com—mobile administrators no longer have to access a separate site to use the Console.



Note: To install the AppExchange Mobile Administration Console package, you must be an administrator in your salesforce.com organization.

- In Mobile 6.0, administrators sign in to the Console using their salesforce.com credentials.
- All users and administrators in the Console must be associated with a salesforce.com username. You'll notice the new Salesforce.com Username field

when adding new users and administrators; the field is required, so you can only create a new mobile account if the user has a salesforce.com account.



Caution: Console administrators must edit the records of users who have not activated their accounts and populate the Salesforce.com Username field. Failing to do so will interfere with the new Device Info Auto Discovery feature. Also note that users cannot access Mobile 6.0 on their devices without a Salesforce username on their mobile accounts.

- In Mobile 6.0, you can access an administrator or user account and change the user's status with the new User Role drop-down. This enhancement makes it easy to demote an administrator to a user or promote a user to an administrator.
- Mobile users can no longer log in to the Console. Access is restricted to administrators.



Caution: If you are both a mobile user and an administrator, your salesforce.com username has been automatically assigned to your user account. For this reason, the Console will no longer recognize you as an administrator. If you can't log in to the Console after the upgrade, contact Salesforce Support to have the user role on your account manually updated from Mobile User to Administrator.

- The new Import Mobile Users button on the Users page lets administrators add multiple user accounts simultaneously by importing the information from a CSV file.

Implementation Tips

- Because users and administrators in the console must now be associated with a salesforce.com username, mobile administrators need to edit the records of users who have not activated their accounts. In the new Salesforce Username field, enter a valid and unique Salesforce username for each mobile user. Ensure that each Salesforce user has only one user record in the mobile console.
- If you deploy the AppExchange Mobile Administration Console package, the Mobile Console home page displays in a frame within the Salesforce window. If the console does not function properly in this environment, administrators can update their browser's security settings.
 - In Internet Explorer, click **Tools ► Internet Options ► Security**. Click the **Trusted Sites** icon, and then click the **Sites** button. In the **Add this web site to the zone:** field, type `*.sendia.com`. Click the **Add** button. Click the **OK** button, and then click the **OK** button again.
 - In Mozilla Firefox, click **Tools ► Options ► Privacy**. Select the **Allow sites to set cookies** option. Deselect the **For originating site only** option. Click the **OK** button.
- When searching for users in the console, administrators can now perform a lookup based on the Salesforce Username field. The Include Administrators check box was removed from the User Search page because the search results will always include both users and administrators.
- The Salesforce Username field is now available as filtering criteria for Event Logs and Message Logs. Profile Name and User Name were removed as filtering criteria.

Install the AppExchange Mobile Console

User Permissions Needed	
To install the AppExchange Mobile Console:	“Download AppExchange Packages”

1. Open the AppExchange Mobile Console in your Internet browser.
2. Enter the **User Name** and **Password** for the administrator account.
3. Click the **Login** button.

The application displays a message introducing the integrated Mobile Administration Console. You can click the Continue button to access the separate console site if you're not ready to download the Mobile Administration Console package.



Note: You might see a warning message that says you do not have permission to download AppExchange Packages. You must be an administrator in your salesforce.com organization to install the package.

4. Click the **Get It Now** button.
Your browser opens an instance of a salesforce.com session, and you are prompted to examine the contents of the Mobile Administration Console 5 package.
5. Review the package contents, and then click the **Next** button.
6. Select the appropriate security level.
7. Click the **Next** button.
If you chose to configure custom settings, enter the security level for each profile, and then click the **Next** button again.
8. Click the **Install** button.
9. Click the **OK** button after you see a message confirming that the installation process is complete.

Access the AppExchange Mobile Console

1. Open a session of salesforce.com in your Internet browser.
2. From the AppExchange Toolbar in the upper right corner of the screen, select **Mobile Administration Console**.
3. Click the **Mobile Console** tab.
Clicking on the Mobile Console page displays the Mobile Administration Console home page.

Add a User

1. From the Mobile Administration Console, click the **Users** node in the permission tree.
2. Click the **Add Mobile User** button.
3. Enter the user's first and last name.
4. In the Salesforce.com Username field, type a valid salesforce.com username in this form: jsmith@acme.com. The username must be unique.

5. In the Email field, enter the email address of the user.
Instructions for downloading the application on the user's device will be sent to this email address if the Device Info Auto Discovery feature is enabled.
6. Add additional contact information, if necessary.
7. Click the **Save and Add Mobile Account button**.
The Console displays the Mobile Application Information tab.
8. Click the **Add New Application button**.
9. Select **AppExchange Mobile** from the **Application** drop-down list.
10. Click the **Next** button.
The application name is associated with the user, and the next screen allows you to select a mobile profile.
11. In the **Profile** drop-down list, select a mobile profile for the user. If you're not sure which profile to select, choose Default Profile.
12. Select the **Send provisioning message** option to send an email to the user with a link to download the application to his or her device.
13. Click the **Save** button.
The Console creates the user account. When the user activates their account from a device, the Console automatically updates the user's record with the device data.

Change a User's Role

You can quickly promote a user account to a mobile administrator account with the User Role drop-down menu.

1. From the Mobile Administration Console, click the **Users** node in the permission tree.
2. Click the **Edit** link next to the user's name.
3. Click the **User Role** down-arrow, and then click **Administrator**.
4. Click the **Save button**.

The Console updates the account, and the user will display on the Administrators page.

Import New Mobile Users

Mobile 6.0 allows administrators to add multiple users simultaneously by importing the account information from a Comma Separated Values (CSV) file. When deploying AppExchange Mobile to a group of users, this feature can save administrators time.

Import Fields

With the Device Info Auto Discovery feature **enabled**, you can import the following fields for user account creation from CSV files. When formatting your CSV file, be sure to enter the data in the order listed below.



Note: Refer to the [Device Info Auto Discovery](#) section for more information about enabling and disabling the feature.

Import Field	Description	Required
User First Name	First name of the AppExchange Mobile user.	No
User Last Name	First name of the AppExchange Mobile user.	Yes
User Email Address	Email address of the user. Must be a valid address in this form: jsmith@acme.com. Instructions for downloading the application on the user's device will be sent to this email address.	Yes
Salesforce Username	A valid and unique salesforce.com username in this form: jsmith@acme.com.	Yes
Application Name	Name of the mobile application. The only valid entry in this field is WSFA.	Yes
Profile Name	Name of the mobile profile to be associated with the user. Enter <code>Default Profile</code> or the name of an existing custom profile.	Yes

With the new Device Info Auto Discovery feature **disabled**, the following fields can be imported for user account and device creation from CSV files. When formatting your CSV file, be sure to enter the data in the order listed below.

Import Field	Description	Required
User First Name	First name of the AppExchange Mobile user.	No
User Last Name	First name of the AppExchange Mobile user.	Yes
User Email Address	Email address of the user. Must be a valid address in this form: jsmith@acme.com. If the Device Email field is left blank, instructions for downloading the application on the user's device will be sent to this email address.	Yes
Salesforce Username	A valid and unique salesforce.com username in this form: jsmith@acme.com.	Yes
Application Name	Name of the mobile application. The only valid entry in this field is WSFA.	Yes
Profile Name	Name of the mobile profile to be associated with the user. Enter <code>Default Profile</code> or the name of an existing custom profile.	Yes
Device Address (PIN)	The unique PIN of the user's mobile device. For the RIM BlackBerry platform, the device address is always eight hexadecimal characters. For the Palm Treo platform, the device address is either sixteen digits or 32-bits.	Yes
Device Operating System	The operating system of the user's mobile device. The two valid entries for this field are: <code>BLACKBERRY</code> or <code>PALMOS</code> . The values must be all caps.	Yes
Device Email	Email address of the user's mobile device in this form: jsmith@acme.com. Instructions for downloading the application on the user's device will be sent to this email address.	No
Device SMS Address	Phone number of the user's mobile device plus the carrier's SMS gateway. Example: 3105553000@cingularme.com	No

Create a CSV File

A CSV file contains the values in a table as a series of text lines organized so that each column value is separated by a comma from the next column's value and each row starts a new line. Any spreadsheet application or text editor is capable of generating CSV files.

Enter the values into the file in the exact order outlined in the **Import Fields** section. If you're using a text editor to create the file, be sure not to add spaces between the commas. When saving the file, verify that the file extension is `.csv`.

Example:

```
John,Smith,jsmith@acme.com,jsmith@acme.com,WSFA,Default Profile  
Anne,Jones,ajones@acme.com,ajones@acme.com,WSFA,OppTeams
```

Import Users

1. From the Mobile Administration Console, click the **Users** node in the permission tree.
2. Click the **Import Mobile Users** button.
3. Click the **Browse** button.
4. Navigate to the folder containing the CSV file.
5. Double-click the file to select it.
6. To generate an email with download instructions to the new users, select the **Send application provisioning instruction to mobile devices** checkbox.
7. Click the **Next** button.

The Console processes the CSV file and displays an import results page. You might see two sections on the results page: one section lists the user accounts that were created successfully, and the other lists failed accounts.

The Console provides error messages for failed attempts. Errors can occur when the CSV file is formatted incorrectly, the salesforce.com username is already in use, or the user does not exist in your salesforce.com organization.

DEVICE INFO AUTO DISCOVERY

It's now easier than ever to deploy AppExchange Mobile. In Mobile 6.0, the Administration Console can automatically detect the device information of new users, which means administrators no longer need to manually create devices in the Console. The benefits of this new feature are clear: it's more efficient to add users, and there is no opportunity for incorrect device data to hinder the deployment process.

About Device Info Auto Discovery

Users can now be added on the Console without being associated to a device; however, user accounts must still be linked to the application and a mobile profile. The end-user process has not changed at all; the user receives a welcome installation email from which they will download and install the AppExchange Mobile software.

Once the new user enters his or her Salesforce credentials to activate the account, the installer detects the device PIN, manufacturer, model, operating system, and transport. The Console automatically creates the device and associates it with the user. The device will show up in the Device Inventory List.



Note: For more details about creating new user accounts in Mobile 6.0, see the section titled [Add a User](#).

Implementation Tips

- By default, the Device Info Auto Discovery feature is inactive in existing domains. If you don't follow the steps in the [Enable Device Info Auto Discovery](#) section, you must continue adding devices manually and then associating them with new users.
- In Mobile 6.0, multiple devices can be registered to a single user. If a user activates the application with a different device, the device information is securely sent to the Console and the user's credentials are validated. The additional device is added to the user's account details.
- When you want to assign an existing device to a different user, deactivate the current user in the AppExchange Mobile application from the System Info screen. When the new user activates their AppExchange Mobile account with their salesforce.com credentials, the Console receives the device information and re-assigns the device to the new user. Because the auto discovery feature automates this process, the Move Device button was removed from the Device Inventory List page.
- The Device Info Auto Discovery feature is also available in Mobile Trials.



Caution: Device Info Auto Discovery will not work unless the user's account is associated with a salesforce.com username. This field is required when adding new mobile users; however, administrators must verify that the information has been entered for existing user accounts.

Enable Device Info Auto Discovery

1. From the Mobile Administration Console, click the **Users** node in the permission tree.
2. Edit the records of mobile users who have not activated their accounts. In the new **Salesforce Username** field, enter a valid and unique Salesforce username for each mobile user.
3. Ensure that each Salesforce user has only one user record in the mobile console.
4. Click the **top node** in the mobile console to access your domain information.
5. Click the **Edit** button.
6. Select the **Allow automatic device configuration** option.
7. Click the **Save** button.



Note: While you must manually enable the Device Info Auto Discovery feature for existing domains, the feature will be enabled by default for newly created domains.

MOBILE TRIALS



Salesforce users can now sign up for a trial of AppExchange Mobile. Upon completing the registration process, users will receive an email with instructions for downloading the AppExchange Mobile client on their device. During the activation process, a default profile is used to retrieve key information from the user's organization, including tasks, events, accounts, contacts, opportunities, leads, and other objects. The default profile can be customized to retrieve any object to which the user has access.

About Mobile Trials

Mobile trials are available on the [Salesforce AppExchange](#). Trial accounts are set to automatically expire 30 days after activation, and on certain platforms, trial customers will see a message on their device's screen indicating the number of days remaining in the trial period.

The trial sign-up process automatically creates a new user account in the Mobile Administration Console; like active user accounts, trial accounts are managed in the console.

Implementation Tips

- The 30-day trial period begins when the user activates the account, not when the user signs up for the account.
- Two new icons on the Users page help administrators identify and manage trial users. The Trial icon  indicates that the mobile user has signed up for a trial; the Expired icon  flags users with expired trial accounts.
- The account details page for trial users includes a Trial Information tab with a Trial User option and Trial Expiration Date field. The Trial Expiration Date field will automatically populate when the user activates the trial account. The Trial User option is used to convert the trial user to an active user.
- Before converting a trial account to an active account, verify with Salesforce Support that you have a sufficient number of user licenses.
- The Invite Mobile User button is no longer available on the Users page. The Mobile Trials feature effectively provides a way for new users to try AppExchange Mobile without the intervention of an administrator.

Convert a Trial Account to an Active Account

1. From the Mobile Administration Console, click the **Users** node in the permission tree.
2. Click the **Edit** link next to the trial user's name.
3. Click the **Trial Information** tab.
4. Deselect the **Trial User** option.
5. Click the **Save** button.

The console displays a warning message explaining that you are converting a trial account to an active account.

6. Click the **OK** button.

The console updates the user account. The Trial Information tab is no longer available on the user's account details page.

ADDITIONAL ENHANCEMENTS – RIM BLACKBERRY PLATFORM

Tab Names

Tab names in AppExchange Mobile are now inherited directly from salesforce.com. The main AppExchange toolbar displays the Salesforce object label instead of the label in the Mobile Administration Console.

Battery Life Enhancements

Many enhancements have been made to the battery life on the RIM BlackBerry devices. Through multiple energy saving measures and timers, drainage rates have dropped dramatically and battery efficiency has escalated, greatly improving the AXM user experience on the RIM platform.

Task List Views

Improved sorting performance on the Task List screen allows user to more quickly switch between both standard and custom views.

Text Area Formatting

In Mobile 6.0, users can use the [RETURN] key to insert a new line in text area fields, such as Task Description and Event Comments. This enhancement allows user to apply paragraph formatting when entering text.

Device Certification

United States – Alltel 7130e
United Kingdom – Vodafone 8707v

ADDITIONAL ENHANCEMENTS – PALM TREO PLATFORM

Calendar UI

Mobile Release 6.0 adds a brand new UI to the Event tab. Salesforce.com events can now be viewed on Appexchange Mobile in a day, week, month, or list view. This allows customers to easily navigate through the most relevant events in a friendly, easy-to-read design.

Usage Tips

- Click the '1' icon (or access via trackwheel) to display the schedule for the current day.
- Click the '7' icon to read events in the Week View; click the '31' icon to display Month View. Click any date in the given week or month to view the events scheduled for that day.
- In the week or month view, a **bold** date indicates that one or more events are scheduled.

- Custom Views into the local data can still be applied in conjunction with the day, week, month, or list view. Filtering criteria will be preserved in custom views, but not column display settings.

Change Record Ownership

Mobile Release 6.0 adds the ability to change ownership of a record via the mobile device. From the view screen of the record, click the trackwheel and select 'Change Owner' to change ownership to any other user in your organization.



Note: Permissions are inherited directly from salesforce.com; if you have permission to reassign a record to another user on the web, you will also be able to do so in AppExchange Mobile.

Combo Picklist Default Values

Mobile 6.0 extends support for Multi-Select Picklist Default values on the Palm Treo platform. If a default value is set on salesforce.com, AppExchange Mobile will inherit that default value automatically, over-the-air.

Text Area Formatting

In Mobile 6.0, users can use the [RETURN] key to insert a new line in text area fields, such as Task Description and Event Comments. This enhancement allows user to apply paragraph formatting when entering text.

Logged Emails

The storage capacity for the text of logged emails has been increased from 1,000 characters to approximately 10,000 characters, which means users are better equipped to keep track of important messages.