



Using the Salesforce1 App

Salesforce, Winter '16



CONTENTS

OVERVIEW	1
Introducing the Salesforce1 Mobile App	1
Requirements for Using Salesforce1	1
Salesforce1 Accessibility Considerations	3
SALESFORCE1 BASICS	4
Getting Around in Salesforce1	4
Data You Can Work With	5
Get More Done with Actions	6
Work with Your Records	7
Notifications	8
Access Communities from Salesforce1	9
Salesforce1 without Chatter	10
COLLABORATE IN SALESFORCE1	11
Switch and Sort Your Feeds	11
Post to a Feed	11
Like or Comment on a Post	11
Mention People and Groups in Posts and Comments	12
Post a Link	12
Add a Poll	12
Vote on a Poll	12
Search within a Feed	12
Bookmark Posts	13
FIND INFORMATION	14
Search Overview	14
Find Recently Accessed Objects	14
Find Items with Record Search	15
Find Items with Global Search	16
Search Requirements and Tips	16
WORK WITH RECORDS	18
View Records	18
See a Record's Related Information	18
Update Data in Your Records	19
Add New Records	20
About Entering Data in Salesforce1	20

MANAGE RELATIONSHIPS AND DATA	22
Make a Phone Call from Salesforce1	22
Log a Previous Call	22
Send Email	22
View an Account's Website	23
Map a Location	23
Edit a Twitter Profile Association	23
Use Twitter People in Common	24
IMPROVE SALES PRODUCTIVITY	25
Increase Close Rates with the Sales Path	25
Convert Leads to Contacts (Beta)	26
MANAGE YOUR DAY WITH TODAY	27
Get to Know Today	27
Set Up Today	27
How Today Matches Salesforce Data with Mobile Calendar Events	28
Prepare for a Meeting	29
Dial In to a Conference Call	30
Supported Conference Call Providers and Invitation Formats	30
Get Directions to a Meeting	31
Send "Running Late" Email Messages	31
TRACK YOUR ACTIVITIES	33
View Events	33
Create Events	33
About Task Lists	34
View Task Lists	34
View Tasks	35
Close or Reopen Tasks	35
Edit Task Details	36
Create Tasks	37
ANALYZE YOUR DATA	38
View Your Dashboards	38
Drill Down from a Dashboard to a Report	38
View Your Reports	39
WORK WITH FILES	40
Files You Can Access	40
Upload a Photo	41
Share a File	41
Find a File	41

Contents

Add a Folder	41
Access Files When Offline	42
MANAGE SALESFORCE1	43
Connect to a Different Instance	43
INDEX	44

OVERVIEW

Introducing the Salesforce1 Mobile App

The Salesforce1 mobile app is Salesforce on the go! This enterprise-class mobile experience gives you real-time access to the same information you see in the office, but organized for getting work done faster between customer meetings, waiting for a flight, even when you're in line for coffee. The intuitive interface makes it easy to navigate and interact with data on a touchscreen, so you can review and update information with just a few taps. And Salesforce1 includes many of your organization's customizations, so the app is tailored to your business needs.

The intuitive interface is optimized for easy navigation and data interaction on a touchscreen, so you can review details, update data, and create new records with just a few taps. And Salesforce1 includes many of your organization's Salesforce customizations, which means your mobile experience is as tailored to your specific business needs as you need it to be.

 **Note:** This release of Salesforce1 doesn't have all of the functionality of the full Salesforce site. To see data or do actions that aren't supported in Salesforce1, use the full site instead.

You can get Salesforce1 in different ways:

- As a downloadable app from the App Store and Google Play™.
- As a mobile browser app that runs in supported mobile browsers. This option doesn't require anything to be installed.

This guide covers all of the Salesforce1 apps. It assumes that your organization is using the out-of-the-box configuration of Salesforce1. If you don't see an option discussed here, ask your administrator if the feature was disabled.

Requirements for Using Salesforce1

Before getting started with the Salesforce1 mobile app, make sure that your Salesforce organization and your mobile device meet these requirements.

Downloadable Apps: Supported Devices

You can run the Salesforce1 downloadable apps on these mobile devices.

- Apple mobile devices with iOS 8 or later:
 - iPhone® 5 and later models
 - iPad® 4 and later models
 - iPad mini 2 and later models
- Android phones with Android 4.4 or later

Mobile Browser App: Supported Browsers and Devices

You can access the Salesforce1 mobile browser app in these environments.

- Apple Safari® browser on iPhone® 5 and later models, iPad® 4 and later models, or iPad mini 2 and later models, with iOS 8 or later
- BlackBerry® Browser on BlackBerry Z10 devices with BlackBerry OS 10.2 or later and BlackBerry Z30 devices with BlackBerry OS 10.2.1.3175 or later. (Salesforce1 isn't supported on BlackBerry Q10 devices.)
- Good Access™ secure mobile browser on supported Android™ mobile devices with Android 4.4 or later and on supported Apple® mobile devices with iOS 8 or later.

- Google Chrome browser on Android phones, and Google® Nexus 7™ and Nexus 10™ tablets, with Android 4.4 or later.
- Microsoft® Internet Explorer® 11 browser on Nokia™ Lumia™ 1020 and HTC™ 8X phones with Windows® 8.1 Update. (Salesforce1 isn't supported on mobile phones and tablets with earlier versions of Windows 8.)

When using the mobile browser app, we recommend turning off Incognito Mode in Chrome, InPrivate Browsing in Internet Explorer, or Private Browsing in Safari or BlackBerry Browser.

Salesforce Editions and Licenses

These Salesforce editions allow the use of Salesforce1. A special Salesforce1 or mobile license isn't required.

- Contact Manager Edition
- Developer Edition
- Enterprise Edition
- Group Edition
- Performance Edition
- Personal Edition
- Professional Edition
- Unlimited Edition

Database.com Edition isn't supported.

These user license types can access Salesforce1.

- Salesforce users
- Salesforce Platform and Force.com users
- Chatter Plus (also known as Chatter Only) users, Chatter Free users, and Chatter External users*
- Customer Community and Partner Community external users
- Portal users who are a member of a Salesforce community

These user license types aren't supported: portal users (unless a member of a Salesforce community), Database.com users, Sites and Site.com users, Data.com users, and Work.com users.



Note: You can access the same data and functionality that's available to you in the full site, as determined by your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets.

*Chatter Plus, Chatter Free, and Chatter External users must have the "API Enabled" profile permission turned on to use any of the Salesforce1 downloadable apps. Chatter External users who have API access can't access Groups or People list views when using a downloadable app.

Wireless Connection

A Wi-Fi® or cellular network connection is needed to communicate with Salesforce. For cellular connections, a 3G network or faster is required. For the best performance, we recommend using Wi-Fi or LTE.

If you're using one of the Salesforce1 downloadable apps, you can view your most recently accessed records when your device is offline.

Locales and Languages

Salesforce1 works with almost all Salesforce-supported locales and the fully supported and end-user languages. (The Salesforce Help includes a complete list of supported locales and languages.) Languages that are read right to left, including Arabic and Hebrew, aren't supported in this release.

Salesforce1 includes multi-currency support, but advanced currency management isn't available.

Salesforce1 Accessibility Considerations

The Salesforce1 mobile app is designed to give users working with screen readers and other accessibility features a fully accessible mobile experience. Unlike the full Salesforce site, Salesforce1 doesn't require accessibility mode. If you use Salesforce1 with an assistive device, look here for considerations to keep in mind.

Salesforce1 works with all the accessibility features built into your mobile device, including VoiceOver and AssistiveTouch on iOS devices and TalkBack and Explore by Touch on Android devices. The following, however, are known issues that affect those accessibility features.

On an iOS device, assistive technology users should consider these issues:

- When VoiceOver is enabled, you may not be able to use three-finger scrolling on some pages. Instead, use the buttons on the top and bottom of the screen to scroll vertically and the buttons on the left and right of the screen to scroll horizontally.
- Using pinch and spread to zoom isn't currently supported. To zoom, use the iOS zoom function.
- Introductory screens have decorative images that are called out but not identified as decorative.

On an Android device, assistive technology users should consider the following:

- When you post to Chatter, the area for writing your post isn't announced.
- Introductory screens have decorative images that are called out but not identified as decorative.

On all devices, the close button for the notifications list doesn't have a description. The notifications list is located in the upper left of the screen.

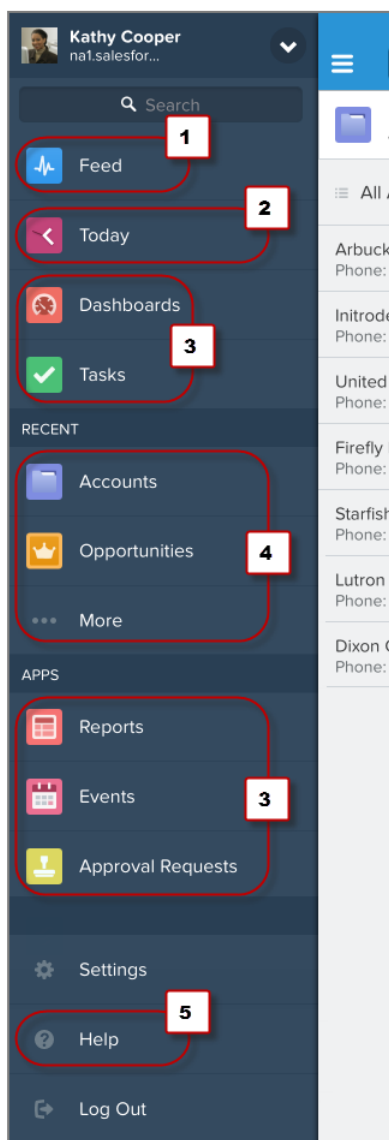
SALESFORCE1 BASICS

Getting Around in Salesforce1



Get to your data using the navigation menu and a few simple gestures.

When you log in to Salesforce1, you see your landing page. Depending on how your administrator has set up Salesforce1, this might be your Chatter feed, your task list, or another page or app.

- From the landing page, tap  to go to the navigation menu.



What you see in the navigation menu depends on how your administrator has set up Salesforce1 and what's available in your organization. The default navigation menu includes:

- Your Chatter feed (1), if Chatter is enabled. There are also separate items for People and Groups.
 - The Today app (2), your one-stop place to review account and contact information before meetings, instantly join conference calls, quickly log notes about events, and more. (Available in the downloadable apps only.)
 - Your task lists, Salesforce events calendar, dashboards and reports, and your organization's custom pages or apps (3).
 - Objects you've accessed recently (4). Tap **More** at the bottom of the Recent section to see the full list of all objects available to you in Salesforce1.
 - Help for Salesforce1 (5).
- Tap  to return to previously viewed pages.
When you tap links, like the ones in feeds or on record detail pages, the new pages open on top of the page you started from. This means that you may have to tap  more than once to return to the navigation menu.
 - To refresh a page, pull down at the top of it.
To see more information than what's currently loaded on a page, pull up at the bottom of it.

SEE ALSO:

[Search Overview](#)

[Work with Your Records](#)

Data You Can Work With

Salesforce1 uses your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets to determine the data that's available to you. Usually you see the same objects, record types, fields, and page layouts that you do when working in the full Salesforce site. Not all Salesforce data or functionality is supported in Salesforce1, however.

If Chatter is enabled, you can access feeds, user profiles, groups, and files.

If you're using a Salesforce1 downloadable app, you can use Salesforce Today to prepare for meetings, stay in touch with customers, quickly join conference calls, and generally manage your day.


These objects are available in Salesforce1. Unless noted otherwise, you can view, edit, or create records for these objects.

- Accounts and Person Accounts
- Campaigns
- Cases
- Contacts
- Contracts
- D&B Company (*view only, for Data.com Premium Prospector and Data.com Premium Clean customers*)
- Dashboards (*view only*)
- Events
- Leads
- Live Chat Transcripts
- Opportunities
- Orders (*view or edit only*)

- Reports (*view only*)
- Salesforce Knowledge Articles (*view only*)
- Tasks
- Work.com Coaching, Goals, Thanks, Rewards, and Skills (*Skills not available in the iOS downloadable app*)
- External objects via Lightning Connect (*view only; not available in the Android downloadable app*)
- Custom objects that have a tab you can access

With some exceptions, all the standard and custom fields are available on these records. And you can work with most of the related lists for supported objects.

If you're new to Salesforce and don't yet have a history of recent objects, you initially see a set of default objects in the Recent section in the Salesforce1 navigation menu. As you spend time working in Salesforce1 and the full Salesforce site, the objects that you use the most eventually replace the default ones in the Recent section and become the objects that are available for global searches in Salesforce1.

 **Tip:** It can take up to 15 days for the objects that you work with regularly to appear in the Recent section. To make objects appear under Recent immediately, pin them from your search results in the full site.

Tap **More** at the bottom of the Recent section to see the full list of all objects available to you in Salesforce1.

SEE ALSO:

[Getting Around in Salesforce1](#)

[Update Data in Your Records](#)

[Find Items with Global Search](#)

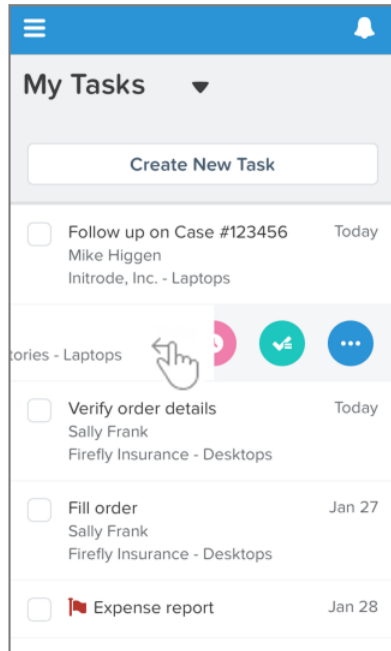
Get More Done with Actions

Actions in Salesforce1 save time by letting you quickly and easily create records, log calls, and do other common tasks, from just about anywhere in the app.

Most pages have an action bar, with a set of actions relevant to that page.



List views, task lists, and related lists on records let you do actions for specific items in the list without having to open any records. (If you're using the mobile browser app on a tablet, this option isn't available for list views.) Simply swipe left on a row in a list. List item actions show the same actions that are available in the action bar when actually viewing the record.



The action bar and list item actions show the three or four most relevant actions for the page you're viewing. To see the complete set of actions that are available, tap . This opens the action menu.

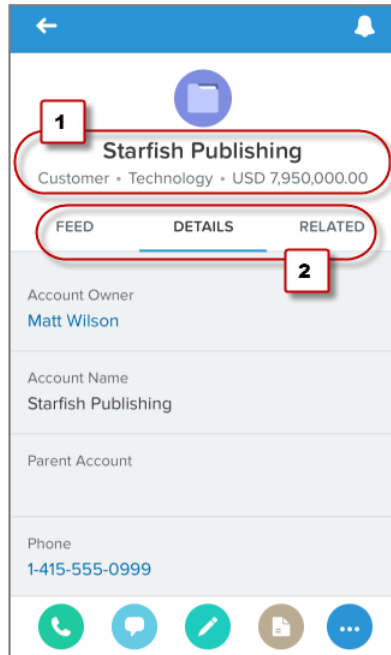
Note: The actions that you see depend on where you are in the app. For example, on an account, you might see actions for creating a contact or case related to the account, while on a case record you might see actions that let you create a child case or a note. Available actions are also affected by how your administrator has set up Salesforce and Salesforce1.

If you're a Chatter Free user, only the basic Chatter actions—Post, File, Link, Poll, and Thanks—are available.

Work with Your Records

Record information is displayed in a multi-page record view.

Record views call out important details in the highlights area at the top of each page. You see up to four fields (1), which are specified by your administrator and are unique to each object.



Depending on the object, the record view may include the record's feed page, the record detail page, and the related information page. For most objects, the record view opens on the record detail page. Swipe, or tap on the desired tab, to move between the pages (2).

As with the full Salesforce site, you need the "Read" user permission on each object for which you want to view records. In most cases, Salesforce1 shows you the same information about a record that you see in the full site. However, some Salesforce data isn't available in this release of Salesforce1.


SEE ALSO:


- [View Records](#)
- [See a Record's Related Information](#)
- [Update Data in Your Records](#)
- [Make a Phone Call from Salesforce1](#)
- [Log a Previous Call](#)

Notifications


Salesforce1 uses notifications to alert you when key events occur that you should know about or that require your attention—such as when you've received an approval request or someone has mentioned you in Chatter.

There are two types of notifications in Salesforce1: push and in-app.

Push notifications are alerts that appear on your mobile device when you're not using Salesforce1. These alerts are available in the downloadable apps only, and can consist of text, icons, and sounds, depending on the device type. You can choose whether to receive push notifications; however, you can't enable push notifications if they were disabled by your administrator. You can also set the types of push notifications that you want to receive, by tapping  then selecting **Settings** > **Push Notifications Settings**.

In-app notifications are alerts that keep you aware of activity while you're using Salesforce1. By tapping , you can view the 20 most recent notifications you received in the last 90 days. When you navigate away from the notifications list, all existing notifications are marked as read.

Tapping a notification takes you to the relevant record. For example, if you tap a notification that someone has mentioned you, the post in which you were mentioned is displayed.

-  **Tip:** If Salesforce Communities is enabled for your organization, you see notifications from all communities you're a member of. To help identify which community a notification comes from, the community name is listed after the time stamp.


SEE ALSO:

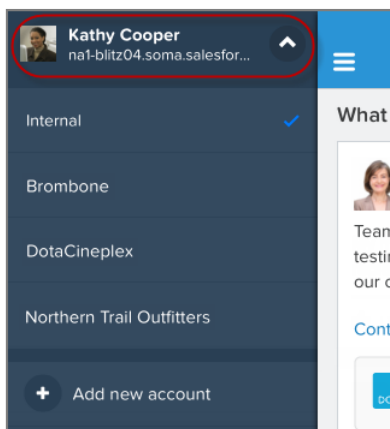
[Access Communities from Salesforce1](#)


Access Communities from Salesforce1

You can use Salesforce1 to switch between your internal organization and your Salesforce Communities if you have a Customer Community, Partner Community, or other supported portal license.

You can switch between your internal organization and any communities you're a member of.

- Tap  then tap the arrow at the top of the navigation menu and select the community you want to access from the drop-down menu.



- To switch back to your internal organization, tap  then tap the arrow next to the community name and select *<Company name>* **Internal**.

When you switch to a community:

- Salesforce1 refreshes to display only content from the selected community.
- Global search is scoped to the community. To reflect this, the text in the search box shows: **Search** *<Community Name>*.
- You see notifications from all communities you're a member of. To help identify which community a notification comes from, the community name is listed after the time stamp.

SEE ALSO:

[Notifications](#)

[Find Items with Global Search](#)

Salesforce1 without Chatter



Salesforce1 is available without the collaboration tool Chatter.

If your administrator has turned off Chatter, Chatter features like feeds and posts won't be available and you won't see the **Feed**, **People**, **Groups**, and **Files** items in the navigation menu. However, you can still access your accounts, opportunities, and other objects, tap a record to see record details, work with tasks and events, and use available apps, including Today. Additionally, users can still access their profiles and upload profile photos.

COLLABORATE IN SALESFORCE1


Switch and Sort Your Feeds

View different feeds and sort posts in a feed by date or by most recent activity.

- From the navigation menu, tap **Feed** to see everything you follow.
If you don't see **Feed** in your navigation menu, your administrator didn't turn on Chatter for your company.
- Tap  at the top of your feed to switch between feeds.
 - **What I Follow:** Updates from people and records you follow, and groups you're a member of
 - **To Me:** Posts others make on your profile and posts and comments where others mentioned you
 - **Bookmarked:** Posts you bookmarked
 - **All Company:** Posts and comments from your entire company, including from people, groups, and feed tracked changes for records and fields
- At the top of your feed, tap  to sort your feed by post date or by posts with the most recent activity.
- Tap a post to see all comments on that post.

Post to a Feed

Write a post to let people know what you're working on, to ask questions, and to share information.

1. Tap  in the action bar.
2. Write your post.
3. Tap **Submit**.

SEE ALSO:

[Mention People and Groups in Posts and Comments](#)

[Like or Comment on a Post](#)

[Post a Link](#)


[Vote on a Poll](#)


[Bookmark Posts](#)

Like or Comment on a Post

Comment on a post or like a post or comment to show your support.


When you comment or like a post or comment, you'll receive email notifications if others comment on that post.

- Tap **Comment** and write your comment.
- Tap  to like a post or comment.



- Tap  on a liked post or comment to stop liking it.

Mention People and Groups in Posts and Comments

Mention people or a group to keep them informed when you're discussing something relevant to them.



- When writing a post or comment, type @ followed by the first few letters of the person's or group's name to see the five best matches, then tap the person's or group's name in the list. To see more matches or search for a person or group, tap . Drag the list up or down to scroll through the list.

Post a Link

1. Tap  in the action bar, then tap  in the action menu.
2. Type the link's URL and a descriptive name for the link.
3. Write something about the link.
4. Tap **Share**.

Add a Poll

Conduct a survey. Add a poll with a list of choices for people to cast a vote.

1. Tap  in the action bar, then tap  in the action menu.
2. Write a question.
You can also mention people or a group.
3. Provide at least two choices.
Tap **Add a choice** to add more choices.
4. Tap **Submit**.

Vote on a Poll

Cast your vote on a poll and view the poll results.

- On a poll, tap one of the choices, then tap **Vote**.
You can only select one choice.
- Tap **View results** to see the latest poll results.
- Tap **Change vote** and select another choice to change your vote.

Search within a Feed

Search the main feed to find something that was previously discussed.

Search in the feed locates information within the main feed's posts, comments, hashtag topics, mentions, and files.

1. At the top of your feed, tap in the search box where it says **Search the feed**. In the iOS downloadable app, drag the page down to expose the search box.
2. Type your search terms.
3. Start the search from your keyboard.
Feed items with matching terms are displayed.
4. Click a feed item to open it and view the matching terms.


If no results are found, tap in the search box again and change your search terms.

Bookmark Posts

Bookmark posts you want to keep track of.


In you're using a downloadable app, simply double-tap the post you want to bookmark.

If you're using the mobile browser app:

1. Tap a post to see the post's expanded view.
2. At the top right of the post, tap , then tap **Bookmark Post**.

The  icon appears at the top right corner of the bookmarked post.

Navigate to your **Bookmarked** feed to see all the posts you've bookmarked.



To remove a bookmark using a downloadable app, double-tap the bookmarked post. In the mobile browser app, tap the post, then tap  and select **Remove Bookmark**.

FIND INFORMATION

Search Overview

Use search in Salesforce1 to quickly get to the data you need. You can search for Chatter people, groups, and files if Chatter is enabled, and all the objects you have access to from Salesforce1, except tasks and events.

There are three ways to search for information in Salesforce1.

- Find an item by the type of object, such as a specific contact or lead. Tap the object in the navigation  menu. This opens the object home page, where you can:
 - Select a specific record from the list of recently accessed items or from a list view.
 - [Search in the record search box](#), where it says **Search** *Object*.
- Find an item by keyword search, such as a person who could be either a contact or lead, using global search.
 - In a downloadable app, scroll to the top of the navigation menu and tap in the **Search** box.
 - In the mobile browser app, tap  in the header.


On the global search page, you can:

- Select a specific record from the list of recently accessed items.
 - [Search in the global search box](#).
- Search for posts, comments, hashtag topics, mentions, and files using the search box in the main feed.

Find Recently Accessed Objects

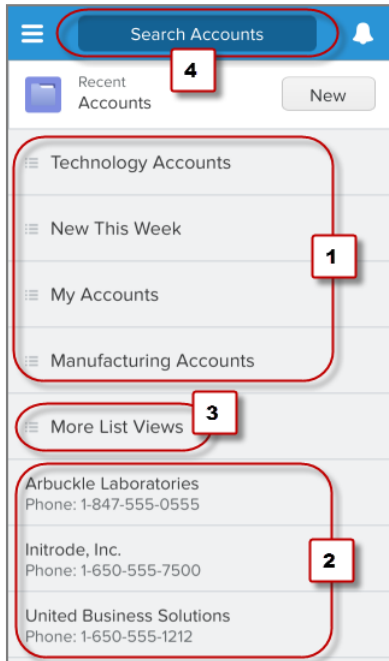
In the Salesforce1 navigation menu, the Recent section shows the objects you access the most.


If you're new to Salesforce and don't yet have a history of recent objects, you initially see a set of default objects in the Recent section in the Salesforce1 navigation menu. As you spend time working in Salesforce1 and the full Salesforce site, the objects that you use the most eventually replace the default ones in the Recent section and become the objects that are available for global searches in Salesforce1.

 **Tip:** It can take up to 15 days for the objects that you work with regularly to appear in the Recent section. To make objects appear under Recent immediately, pin them from your search results in the full site.

Tap an object in the Recent section to open the object's home page.

- This page includes up to four of your mostly recently accessed list views (1) and your recently accessed records (2) within the object. You can select records directly from this list or from your list views.



- If you've accessed five or more list views in the full site, the **More List Views** option displays (3). Tap this option to see up to 200 standard and custom list views for the object. (In the mobile browser app, this option is available regardless of the number of list views you've used in the full site.)
- Use the search box (4) to find records that you haven't accessed recently. (If you're using the mobile browser app on a tablet, tap  in the header to access the search box.)

SEE ALSO:

[Data You Can Work With](#)


[Find Items with Global Search](#)

[Find Items with Record Search](#)

Find Items with Record Search

Tapping the name of an object in the navigation menu, such as Contacts or Opportunities, opens the object's home page where you can search for specific records.

If the record you want isn't in the list of recently accessed items, search the object.


1. Tap in the search box where it says **Search** *Object*. (If you're using the mobile browser app on a tablet, tap  in the header first.)
2. Type your search terms.
As you type, the list of recently accessed records filters to show matching items. You can select an item from this list at any time.
3. If there are no matching items, start the search from your keyboard or tap **Search for** *your keywords* at the bottom of the search page.
Search results include all the matching records that you can access for this object. Matching list views are excluded.

If no results are found, tap in the search box again and change your search terms.

Find Items with Global Search


Use global search to find records for the objects that are in the Recent section of the Salesforce1 navigation menu. Tasks and events aren't available in global search.

The way you access the global search box depends on the Salesforce1 app you're using.


- Downloadable apps: open the Salesforce1 navigation menu and tap the search box.
- Mobile browser app: tap  in the header.

To do a global search:

1. Tap in the search box.

 **Note:** In the mobile browser app, the global search page is organized by object so you can see recently accessed items and search results on an object-by-object basis. The search scope bar below the search box shows the object that you're currently searching. Tap a different object in the bar to change your view. Swipe to the left on the bar to see objects that aren't currently visible.

2. Type your search terms. The list of recently accessed items changes to show only items that match what you've typed so far. (In the mobile browser app, when three or more characters are entered, the list continues to filter matching recently accessed items and also starts to show matching records that haven't been accessed recently.) At any point, you can tap an item in the list to open it.
3. If no matching items are displayed by the time all keywords are entered, start the search from your keyboard or tap **Search for keywords** at the bottom of the search page.

 **Note:** When doing a global search in Salesforce1, you can find records for the objects that appear in the Recent section only. To find records for the other objects that are in the full object list when the Recent section is expanded, search from the object's home page.

It can take up to 15 days for the objects that you work with regularly to appear in the Recent section. To make objects appear under Recent immediately, pin them from your search results in the full site.

SEE ALSO:

[Access Communities from Salesforce1](#)

Search Requirements and Tips

Keep in mind these requirements for search terms, and these tips for enhancing your search results.

- Your search term must have at least two characters. Special characters, such as " ? * (), aren't included in the character count. For example, a search for (a) won't return any search results.
- Text searches are case-insensitive. For example, searches for *Customer*, *customer*, and *CUSTOMER* return the same results.
- To find a phone number, enter part or all of a number. For example, to find (415) 999-3434, enter 415 9993434, 9993434, or 999-3434.

Refine Search Results Using Operators and Wildcards


 **Note:** Wildcards and operators aren't recognized when searching for dashboards.

- Search for exact phrases by putting quotation marks around multiple keywords. For example, "*call john smith*" finds items with *call john smith*, but not items with *call john p. smith* or *john smith called*.
- Narrow or broaden your search using operators such as AND, OR, and AND NOT.
- If you don't know the exact name or phrase that you're looking for, use a wildcard character as a placeholder for characters or words.
 - Asterisks match zero or more characters at the middle or end of your search term. For example, a search for *john** finds items that start with *john*, such as, *john*, *johnson*, or *johnny*. A search for *mi* meyers* finds items with *mike meyers* or *michael meyers*.
 - Question marks match only one character in the middle or end of your search term. For example, a search for *jo?n* finds items with the term *john* or *joan* but not *jon* or *johan*. You can't use a ? in a lookup search.

WORK WITH RECORDS

View Records

You can use Salesforce1 to view the same records that you access in the full Salesforce site.

1. Tap  then do one of the following:
 - Use global search to find a record.
 - Tap the desired object in the Recent section, then select a record from the list of recently accessed items, from a list view, or do a record search.
2. In the record view, swipe right or left to move through the record's pages, or move directly to a specific page by tapping its tab.
3. On a page in the record view:
 - Do actions from the action bar, like post to the record's feed or create a related record.
 - Tap links in fields on the record detail page to make a phone call, send an email, open another record, or view an external website.
 - View other information, like account news, related lookups, related lists, or Visualforce pages on the related information page.

SEE ALSO:

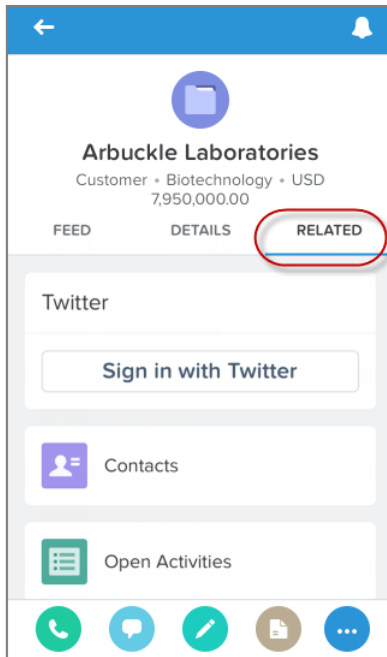
[See a Record's Related Information](#)

[Get More Done with Actions](#)

See a Record's Related Information

When you view a record, you can also access information that's related to the record, including related lookups that show other objects associated with the record, related lists, and Visualforce pages. You can also see Twitter profiles and account news on some objects. In Salesforce1, this information displays in separate cards on the related information page. The related cards you see depends on your permissions and your organization's page layout customizations.

1. When viewing a record, swipe to the related information page, which is usually the third page in the record view.




2. Scroll the page to see the available related lists and other cards. At the bottom of the page, you may need to pull up to load additional cards.
 - Use the Twitter card to associate and view Twitter profiles for accounts, contacts, and leads. If you don't see this card for these objects, ask your administrator to set up the Twitter feature for Salesforce1.
 - Use the Account News card to see top news items for accounts. If you don't see this card on your accounts, ask your administrator to enable Account News.
 - Use a related lookup card to see other objects that have a relationship with the record; for example, opportunities that are associated with the event record you're viewing. These cards display only when associated records exist.
 - Tap a related list card to view the complete related list, then select a related record to view it in a new page.
 - Tap a Visualforce card to open the mobile-optimized Visualforce page.

SEE ALSO:

[Edit a Twitter Profile Association](#)

Update Data in Your Records

You can use Salesforce1 to edit the same records that you have permission to edit in the full Salesforce site. As with the full site, you need the "Edit" user permission on each object for which you want to edit records.

1. When viewing a record, tap  in the action bar.
2. Update the record's information on the edit page.
3. Tap **Save**.

Unsupported fields can't be edited in Salesforce1. Use the full site to update data in unsupported fields.

SEE ALSO:

[About Entering Data in Salesforce1](#)

[Data You Can Work With](#)





[Edit Task Details](#)

Add New Records

You can create records for any standard or custom object that you're able to access. You need the "Create" user permission on any object for which you want to create records.

 **Note:** The way you create [tasks](#) and [events](#) is a bit different from the steps described here.

To create records for standard or custom objects:

1. Select one of these options.
 - In the navigation  menu, tap an object in the Recent section, then tap **New**. (If you're using the mobile browser app on a tablet, tap  in the action bar.)
 - In the action bar on a feed or in a record view, tap the action for the type of record you want to create; for example,  or . (The actual icons that you see in the action bar and action menu depend on where you're working in the app, how your administrator has set up actions for your organization, and whether your organization has Chatter enabled.)
2. Select a record type, if prompted.
3. Enter information for the record on the create page.

You aren't able to enter data to fields that aren't supported in the Salesforce1 app. You'll need to use the full Salesforce site to populate these types of fields.
4. Tap **Save**.

SEE ALSO:

[See a Record's Related Information](#)

[About Entering Data in Salesforce1](#)

[Create Tasks](#)

[Create Events](#)

About Entering Data in Salesforce1

Here are some notes about working with different types of fields when creating or editing records in the mobile app.

- You can't modify a record's owner or its record type.
- There are a few fields that aren't currently supported and can't be populated in Salesforce1, or that have restricted functionality in Salesforce1.
 - division fields
 - state and country picklists

- territory management fields
- Combo boxes, which combine a picklist with a text field (for example, the `Subject` field on task records), aren't available. Salesforce1 eliminates the picklist and includes the text field only.
- Lookup fields:
 - Enhanced lookups aren't supported, so you can't use wildcards in lookup searches and you can't sort, filter, and page through search results.
 - Dependent lookups aren't supported.
 - Lookup filters aren't respected, so lookup search results aren't restricted in any way. You may wind up selecting an item that isn't valid for your organization, resulting in an error message when you save your record.
- Phone number fields display a keypad, from which you tap out the phone number. The keypad doesn't include parentheses, hyphens, or periods, and Salesforce1 doesn't apply any phone number formatting when you save the record. If you want to apply a specific phone number format, edit the record in the full site.
- Controlling and dependent picklists are supported, but Salesforce1 doesn't display indicators for these fields on create and edit pages. To determine if a picklist field is dependent, and which picklist field controls it, view the record in the full site.
- Salesforce1 automatically adds `http://` to addresses in URL fields. For secure web pages, however, you need to manually enter `https://`.


SEE ALSO:


- [Update Data in Your Records](#)
- [Edit Task Details](#)
- [Add New Records](#)
- [Create Tasks](#)
- [Create Events](#)

MANAGE RELATIONSHIPS AND DATA

Make a Phone Call from Salesforce1

Make a call to a contact, account, or lead directly from Salesforce1.


1. When viewing a record, tap  in the action bar.


 **Note:** If this option doesn't appear in the action bar on your record, verify that you have the required "Edit Task" user permission, the record includes a phone number to call, and you have access to view phone numbers for the record.

2. If more than one phone number is available, select the number to call.
3. When your call is finished, complete the Log a Call form if desired and tap **Save**.

Log a Previous Call

When you make a phone call to an account, contact, or lead using Salesforce1, you're automatically prompted to log the call. You can also choose to log a call that you made at another time.

1. When viewing a record, tap  in the action bar.


 **Note:** If this option doesn't appear in the action bar on your record, verify that you have the required "Edit Task" user permission, the record includes a phone number to call, and you have access to view phone numbers for the record.

2. Select:
 - A phone number to initiate and complete a call.
 - **Log Without Calling** to enter notes about a call made at a different time.
3. Complete the Log a Call form and tap **Save**.

If you log a call you made outside Salesforce1, the date and time reflect when you create the log and can't be changed to match the date and time you actually made the call.

Send Email

Send an email message to a contact, lead, or person in your organization.

1. When viewing a record, tap  in the action bar.


 **Note:** This option doesn't appear in the action bar if there aren't any email addresses for your contact, lead, or colleague, or if you don't have access to view email address fields.


2. If more than one email address is available, select an address to send mail to.

Email is sent from your device's email app. When you're finished, switch back to the Salesforce1 app.

View an Account's Website

Quickly view websites associated with your accounts.

1. When viewing an account, tap  in the action bar.


 **Note:** This option doesn't appear in the action bar if the account record doesn't include any website URLs or if you don't have access to website URL fields.


2. Select a website, if more than one is listed.

The website opens in your device's Web browser.

Map a Location

View a map of your account's, contact's, or lead's address or geolocation.

1. When viewing a record, tap  in the action bar.

 **Note:** This option doesn't appear in the action bar if your account, contact, or lead record doesn't include any addresses or geolocation coordinates.


2. If more than one location is available, tap the address you'd like to map.
3. Confirm your map request, if prompted.

Maps open in your device's map app.



Records with standard address fields display a Google Maps image of the address. The address must include the street and city fields and either the state, postal code, or the country. Tap the map image to open the address in your device's map app.


Edit a Twitter Profile Association

If your organization uses Social Accounts and Contacts, you can associate accounts, contacts, and leads with Twitter profiles, or change or remove existing associations.


 **Note:** As in the full Salesforce site, you must have a Twitter account to set up or edit associations with Twitter user profiles, and "Edit" permission for accounts, contacts, or leads.

If the Twitter card isn't available on account, contact, or lead related information pages, ask your administrator to set up the Twitter feature for Salesforce1.

1. Associate or view Twitter profiles from the Twitter card on the related information page in a record view.
 - To associate a Twitter profile, tap **Sign in to Twitter** and log in to Twitter, or tap **Search for Twitter Profile**.
 - To change the Twitter profile association, tap , then tap **Change Association**.
 - To remove the Twitter profile association, tap , then tap **Remove Association**. The association will be removed.
2. Salesforce1 searches for Twitter profiles matching the name of your account, contact, or lead. If the search doesn't return any results, or if none of the results appear to be the right profile, you can change the search and try again.

 **Note:** You can associate up to 15 Twitter profiles in a 15 minute period.

3. Tap a Twitter profile to associate it.

 **Note:** Associating a Twitter profile doesn't make you follow the user on Twitter.

Changes made to associations with Twitter are shared between the full site and Salesforce1.

Use Twitter People in Common

Discover common connections you share with your accounts, contacts, or leads.

People in Common lists up to five Twitter users who you follow, and who your account, contact, or lead also follows.

Tap a Twitter user icon to view that user's Twitter profile.

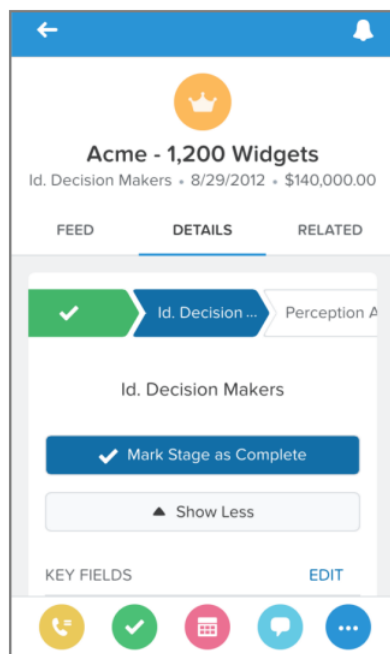
IMPROVE SALES PRODUCTIVITY

Increase Close Rates with the Sales Path

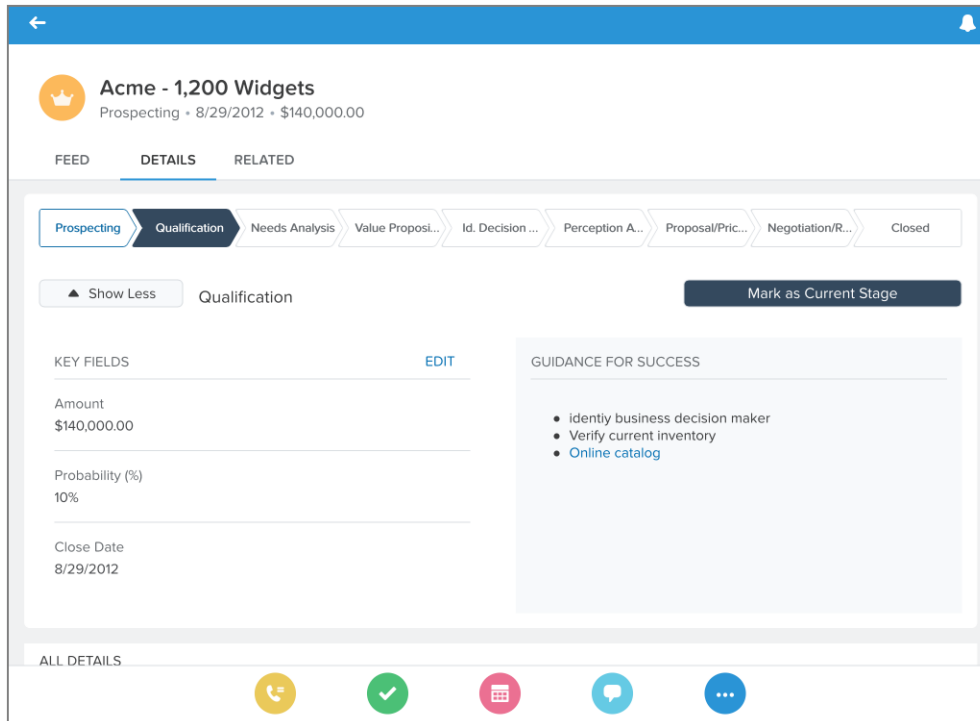
Now it's easy to follow your organization's sales process and get your deals to closed! Sales Path is a visual assistant that guides you through each of the stages required to complete a sale. At each stage, Sales Path highlights key opportunity fields and offers additional information, such as tips and Chatter links, that can help with closing the sale.

 **Note:** If you don't see Sales Path when viewing opportunities, ask your administrator to enable this feature.

When you view an opportunity in Salesforce1, Sales Path shows the opportunity's stage, the key fields to complete, and additional stage-relevant information, such as links to Chatter posts and files, tips for the stage, and policy notes. When the stage is completed, simply tap **Mark Stage as Complete** to continue. The opportunity updates to the next stage, displaying the key fields and information for the new stage.




If it turns out you marked a stage as complete too soon, you can easily go back to an earlier stage. Select the stage name then tap **Mark as Current Stage** or change the stage in the opportunity record. Fast tracking a sale? You can skip ahead to a later stage using the same process.



When you're working with an opportunity, you can hide Sales Path by tapping **Show Less** and recall it by tapping **Show More**. In either case, the entire opportunity, including all of its fields, appears under **All Details**.

Convert Leads to Contacts (Beta)

Convert qualified leads to contacts and create opportunities, so you can grow your revenue pipeline on the go.

 **Note:** Converting leads in Salesforce1 is a beta feature that is production quality but has known limitations. You can provide feedback and suggestions for Lead Conversions on the [IdeaExchange](#).

If you don't see this option when working with Leads in the mobile app, ask your administrator to enable it.

To convert qualified leads to contacts and create opportunities, open the lead record and tap  on the action bar.

If Duplicate Management is enabled for your organization, Salesforce1 will warn you if you're about to create a duplicate contact.

MANAGE YOUR DAY WITH TODAY




Get to Know Today

Salesforce Today in Salesforce1 gets you ahead of your day from the start, and helps keep you there as the day progresses. By collating the meetings, appointments, and other events from your selected mobile calendars, together with your Salesforce tasks, contacts, accounts, and other recent records, Today gives you a central place to manage your entire day. Today is available in the Salesforce1 downloadable apps only.

Your day's mobile calendar events are listed in the Current Event card, where you see the starting time, duration, location, and number of invitees for your next meeting—and in the Agenda card, which has several states that allow you to see upcoming events, earlier events, or all events for the day. When it's time to prepare for a meeting, tap an event. You can review the full list of invitees and any notes from the original invitation. And perhaps best of all, if Today finds that any invitees or the organizer have email addresses that match Salesforce contacts, person accounts, or users, it creates links to those records, as well as any related accounts, so you can access customer details directly from the event.

In addition to mobile calendar events, you can also work with important tasks, your recently accessed Salesforce records, current posts from your To Me feed, news items for accounts you're meeting with today, and the first chart from your most recent dashboard—making Today your one-stop place for accessing key information.

Today also simplifies customer interactions with helpful actions that cut down on the amount of time spent switching between different apps.

- Quickly email an event's attendees to clarify a detail or to let people know you're running a little late using the  icon.
- Join a conference call with a few taps using the  icon.
- See a map of where your next meeting is located and get directions with the  icon.
- Log a mobile calendar event in Salesforce with the **Log this Event** button.
- Add new contacts to Salesforce directly from a meeting's list of invitees.

To get started, tap **Today** in the navigation  menu.

 **Note:** If Today isn't visible in the Salesforce1 app, ask your administrator to add the Today item to the navigation menu.

SEE ALSO:


[How Today Matches Salesforce Data with Mobile Calendar Events](#)

[Set Up Today](#)


[About Task Lists](#)


Set Up Today

To get started using Today, select the mobile calendars that you want to see in the app.


 **Note:** Today is available in the Salesforce1 downloadable apps only. If you don't see Today in the app, ask your administrator to add the Today item to the navigation menu.

1. From the navigation  menu, tap **Today**.

2. Tap **Get Started**.
3. *iOS devices only:* Tap **OK** to grant calendar access to Salesforce1.
You can't use Today if you don't grant this access.
4. In the list of mobile calendars that are available on your device, select or deselect the calendars that you want Today to use.
5. Tap **Save**.
6. If you later add or change calendars on your mobile device, use the  icon at the bottom of the main Today page to update your settings.

 **Tip:** Today collects all of the events for the current day from the mobile calendars you selected during setup and displays them in the event list. If your calendar servers don't push data to your mobile device, you'll need to keep your calendars up to date in order for Today to show you the most current event information.




If you use an iOS device and decide not to grant calendar access, or turn off calendar access after initially granting it, you won't be able to use Today. To start using Today again:

1. Go to your iOS Settings and select **Privacy > Calendars**, then turn on access for Salesforce1.
2. Return to Today, scroll to the bottom of the main page and tap the  icon.
3. Select or deselect the calendars that you want Today to use, then tap **Save**.

How Today Matches Salesforce Data with Mobile Calendar Events

When you view a mobile calendar event, Today looks to see if there are existing Salesforce contacts, person accounts, or users that are related to the meeting's organizer and invitees. And if there are matching contacts, Today also looks for related accounts. (Today is available in the Salesforce1 downloadable apps only.)

Matching Salesforce Contacts, Person Accounts, or Users to Meeting Attendees

If an existing Salesforce contact, person account, or user record is related to a meeting's organizer or invitees, Today updates the event so the person's name links to the matching record and changes the person's avatar. The  avatar indicates there's a matching contact or person account. If there's a matching user, either the user's profile image is displayed, or if the user doesn't have a profile image, the  avatar is displayed along with the person's job title. The  avatar also means Today is still looking for a match or there is no matching Salesforce record for the person.

Today uses this criteria to decide if there are appropriate contacts, person accounts, or users to associate with an event's participants.

- A record is a match if the record's `Email` field contains the same email address that's used in the event for an invitee or the meeting organizer. The email addresses must include the same characters exactly. For example, `m.rigsby@univpaper.com` doesn't match `m.rigsby@sales.univpaper.com`.
- If multiple contacts or person accounts have the same `Email` field data, Today picks a record based on your organization's configuration:
 - If Salesforce for Outlook is enabled, Today uses the matching criteria option selected for your Salesforce for Outlook configuration. You can see the matching criteria in your personal settings in the full Salesforce site. Select **Setup > Desktop Integration > Salesforce for Outlook > View My Configuration** or **My Settings > Desktop Add-Ons > Salesforce for Outlook > View My Configuration**.
 - If Salesforce for Outlook is enabled but your configuration doesn't specify matching criteria, Today picks the record that was most recently modified.
 - If your organization doesn't use Salesforce for Outlook, Today picks the record that shows the most recent activity, as shown in the record's Activity History related list.

- If multiple users have the same `Email` field data, Today links to the user record that was last modified.
- If a user and contact or person account have the same `Email` field data, Today links to the user record.
- Today won't create links to portal users or inactive users.

It's not possible to manually associate a Salesforce record with an invitee or meeting organizer.

When Today finds matching Salesforce records:

- Links to the records are added to event invitees and organizers. Links to contacts or person accounts are added if you have permission to use these objects, and permission to access the `Email` field on these records.
- When a link is added, Today changes the invitee or organizer's name to the value of the first field in the compact layout for the matching contact, person account, or user profile record. By default, this is the `Name` field.
- If an event has a large invitee list, links may not display all at once.

To stay in sync with changes in Salesforce, Today re-matches invitees and organizers each time you view an event.

Related Accounts

A mobile calendar event may include an Account card, which lists accounts that are related to the event, so you can quickly review information like account details, pending opportunities, or open cases in advance of a meeting. You must have the "Read" user permission on accounts to see this card.

Today determines that an account is related to an event if it's associated with a contact record that matches one of the meeting invitees. Person accounts aren't included in this card.

If a meeting includes contacts from a variety of different accounts, Today lists up to three accounts, picking those that are associated with the largest number of contacts. To see how Today chooses the most relevant related accounts for an event, consider a meeting that includes 10 invitees who are all contacts in Salesforce, representing five different companies:

- Three contacts from PetEdge.com
- Three contacts from Chewy, Inc.
- Two contacts from Pet Food Express
- One contact from Joe's Pet Supply
- One contact from Petopia

The Account card for this event will list PetEdge.com, Chewy, Inc., and Pet Food Express because PetEdge.com and Chewy, Inc. have three representatives each and Pet Food Express has two representatives.

Prepare for a Meeting

Before a meeting, you'll probably want to check for last minute updates or refresh your memory about important details, including details that are stored in your associated Salesforce account, contact, person account, and user records. With Today, you can do your meeting preparation from a single place. (Today is available in the Salesforce1 downloadable apps only.)

Tap an event in the Current Event or Agenda card. Then:

- Check out the list of invitees and see who has accepted (✓), who hasn't responded yet (?), and who isn't attending (—). If it's a large meeting, tap **More** to see additional invitees.
- Review Salesforce data for invitees or the organizer by tapping on names with the 👤 avatar, a user profile avatar, or the 🗺️ avatar if accompanied by the person's job title. The matching contact, person account, or user record opens. (The 🗺️ avatar without a job title means there isn't a matching Salesforce record.)
- Review related account information, such as account details, pending opportunities, or open cases, by tapping on items in the Account card.

- Review notes from the meeting invitation, including any conference call details. Links in the **Notes** card open in a new page.

SEE ALSO:


[How Today Matches Salesforce Data with Mobile Calendar Events](#)

[Dial In to a Conference Call](#)


Dial In to a Conference Call

Are you tired of struggling with long conference call numbers while you're juggling your meeting materials and coffee? Using Today, you can quickly join online meetings with just a few taps. (Today is available in the Salesforce1 downloadable apps only.)

The conference call dialer automates as much of the dial-in process as possible, based on the information available in the event. It's completely automatic to join Citrix® GoToMeeting® events that include a GoToMeeting URL and dial-in number, or conference calls that include a dial-in number and access code in this format: `<dial-in number>,,,<access code>`. Joining calls that are hosted by other conference providers takes a few more taps but is significantly easier than manually entering a phone number and access code.

1. From the event list in Today, tap an event card.
2. Tap  in the action bar.
3. The next step depends on the conference call details included in the event.
 - If Today can identify both the dial-in phone number and the access code, simply tap **Call**. Today automatically dials you in to the conference call.
 - If there are multiple phone numbers in the event—or if Today can't identify the phone number, the access code, or both with a certainty—select the correct information in the “Choose a Phone Number” or “Choose an Access Code” lists.

Then tap **Call**. Today automatically dials the phone number you selected. When the conference provider prompts for the access code, tap **Dial** “`<number>`” on your mobile device to automatically enter the access code you selected. Manually enter any other required information using your device's keypad.

 **Note:** If Today isn't certain about what the meeting access code is, or if the meeting doesn't include an access code at all, the “Choose an Access Code” list includes the **Skip this Step** option. In this case, Today dials the phone number only and you can manually enter the access code and any other required information.

4. When the meeting is finished, switch back to the Salesforce1 app.

SEE ALSO:

[Supported Conference Call Providers and Invitation Formats](#)

Supported Conference Call Providers and Invitation Formats

The Today conference call dialer is available if your mobile device supports making phone calls and if the event you're viewing includes a valid conference call dial-in number. (Today is available in the Salesforce1 downloadable apps only.)

The conference call dialer automates as much of the dial-in process as possible. The level of automation available depends on the conference call provider and the details included in the event.

- It's completely automatic to join Citrix GoToMeeting online meetings if an event includes a valid GoToMeeting URL and a single valid dial-in phone number. You simply tap to start the dial-in process and wait to be connected.

- It's also automatic to join online meetings from any provider if an event includes a dial-in number and an access code, in this format: `<dial-in number>,,,<access code><other>`, where `<other>` can include additional numbers, # symbols, commas, and asterisks. The numbers must be entered on a single line and there can't be any spaces after the first comma. For example:

```
1234567890,, ,1234567#11#
```

- It's slightly less automated to dial in to an event that includes multiple phone numbers, to a GoToMeeting event that doesn't include a meeting URL, or to an event hosted by other conference providers such as WebEx®, InterCall®, and Microsoft® Lync®. Depending on the information available in the event, you may need to tap to select the dial-in phone number, the access code, or both.

The conference call dialer also has these requirements:


- The conference call invitation details must be included in the `Location` field or in the `Notes` (iOS device) or `Description` (Android device) section of the event.
- GoToMeeting URLs must exist on a single line.
- The dialer supports local and international phone numbers that contain between 7 and 15 digits. The phone number can be in any format.
- An access code must contain a minimum of seven numbers.


SEE ALSO:

[Dial In to a Conference Call](#)

Get Directions to a Meeting


Today shows you where your next meeting is located, using the default map app on your mobile device. You can also ask your map app to give you directions to the meeting location. (Today is available in the Salesforce1 downloadable apps only.)

- From the event list in Today, tap an event card.
- Tap  in the action bar.
- Tap on the location marker to get directions from your current location to the meeting.
- Switch back to the Salesforce1 app.

If an event doesn't include a location for the meeting, the  icon isn't available.

Send "Running Late" Email Messages

Quickly send an email to let a meeting organizer or other attendees know that you're going to be delayed or miss the meeting altogether. Today includes several pre-written, "quick" messages so you don't have to do any typing. Or you can write your own message. (Today is available in the Salesforce1 downloadable apps only.)

- From the event list in Today, tap an event card.
- Tap  in the action bar.
- Tap an appropriate quick message or tap **Write your own...** to create a custom email message.
- Tap **All** to send the message to everyone involved in the meeting or select a specific person to contact.
- Review the message then tap **Send** to deliver the email message.

The default subject of the email is **Re: <Event Title>**. You can change the subject text before delivering the message. You can also customize or expand the quick message that you selected.

TRACK YOUR ACTIVITIES

View Events

View your events from the Salesforce1 navigation menu. Or view events related to a specific record, such as a lead or an account, on the record's related information page or in the record feed.

1. You can view Salesforce events in these places:

- **My Events list.** Go to the navigation menu and tap **Events**.

You see a weekly view that allows you to see event lists for specific days. An event list includes events that you created for yourself and that you or your groups are invited to. Events that are available to you through your organization's role hierarchy settings aren't displayed, nor are proposed events.

To see events for a different day, tap a date in the date bar. Swipe left on the date bar to see the next week; swipe right to see the previous week. The date bar shows up to the four future weeks and four previous weeks. (If you're using the mobile browser app on a Windows device, you're able to view the current week only.)

- **An activities related list.** Go to a record view and swipe to the related information page. Tap **Open Activities** or **Activity History** to see events related to the record.
- **A record feed.** In a record view, swipe to the record feed page. If an event is related to a record when the event is created, the record feed displays a post about the event. (The feed doesn't display posts about updates to events. Additionally, depending on your organization's settings, feeds may not display events, or feeds may be unavailable altogether.)

2. Tap an event to see the event record.

SEE ALSO:


[Create Events](#)

Create Events

Create an event on the spot for a record you're viewing in Salesforce1, such as a lead or a contact. Or create an event when working with your event lists.

If you're working with a record or in the feed:

1. Tap  in the action bar.

(The  icon may not be available for some or all objects, depending on your organization's settings.)

2. Enter the event details and tap **Save**.

If you selected **Events** from the navigation menu to work with your event lists:

1. Tap  in the action bar.

2. Enter the event details and tap **Submit**.

SEE ALSO:

[View Events](#)

About Task Lists

Salesforce1 includes lists of open, closed, and delegated tasks to help you manage your time while you're in the field.

Types of Task Lists

My Tasks

All tasks owned by you and not marked closed

Completed

Closed tasks that you own and that you've assigned to others

Delegated

Open tasks you've assigned to others whose tasks you have permission to view

Today

All tasks owned by you that are due today or are overdue

How the Lists Work

Overdue tasks

If the My Tasks, Delegated, or Today list contains 10 or more overdue tasks, those tasks are collapsed until you tap to see them. Tap **Show Overdue Tasks** at the top of the list to display the 10 tasks with the most recently passed due dates. Tap again to show more overdue tasks. To collapse the list again, refresh it by pulling down.

Sort order

In the My Tasks and Delegated lists, tasks are sorted by due date (earliest first), then priority (🔴 first), then the date they were created (earliest first). Tasks with no due date appear last. In the Completed list, tasks are sorted by the date they were last modified instead of by due date.

SEE ALSO:


[View Tasks](#)

[Create Tasks](#)

View Task Lists

View a list of your open tasks, or switch to a list of your completed or delegated tasks or tasks to do today.

- **View your open tasks.** Go to the Salesforce1 navigation menu and tap **Tasks**. The default list is My Tasks.

- **Switch lists.** In My Tasks or any other task list, tap . In the drop-down menu, tap the list you want (Completed, Delegated, or Today).

SEE ALSO:

[About Task Lists](#)

View Tasks

View tasks when and where you need to see them—in the context of all your tasks or just for an individual record.

1. You can view a task in any of the following places:
 - **A task list.** Go to the navigation menu and tap **Tasks**.
 - **An activities related list.** Go to a record view and swipe to the related information page. Tap **Open Activities** to see open tasks or **Activity History** to see closed tasks.
 - **A record feed.** In a record view, swipe to the record feed page. If a task is related to a record when the task is created, the record feed displays a post about the task. (The feed doesn't display posts about updates to tasks. Additionally, depending on your organization's settings, feeds may not display tasks, or feeds may be unavailable altogether.)
2. Tap a task to see the task record.

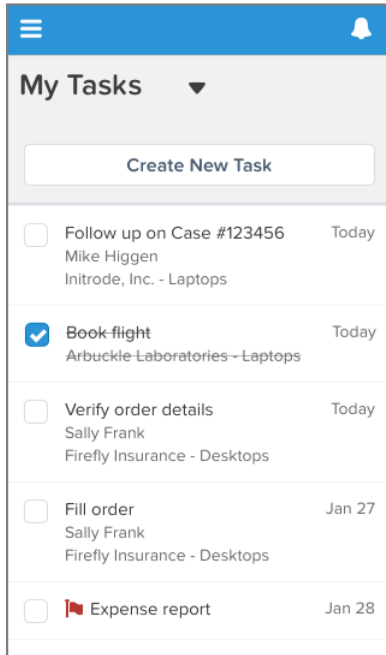
SEE ALSO:

[About Task Lists](#)

Close or Reopen Tasks

Keep your task lists up to date: Just tap to close tasks you've completed or to reopen tasks that need renewed attention. The "Edit Task" user permission is required.

1. Go to any of these locations:
 - **A task list.** In the navigation menu, tap **Tasks**.
 - **A task's record view.** In a task list, tap a task.
 - **A record's related activities list.** In a record view, swipe to the related information page. Tap **Open Activities** to see open tasks or **Activity History** to see closed tasks.
2. Close or reopen a task. You can do this in the task's record view or from a list.
 - To close a task, tap .
 - To reopen a task, tap .



Considerations for closing and reopening tasks:

- If your administrator has created conditions for closing a task (for example, requiring you to enter a comment), you may need to open the task details and edit them before you can close the task.
- If your administrator has set up more than one Closed or Open status for tasks, a menu requiring you to choose a status may appear when you reopen or close a task.



SEE ALSO:

[Edit Task Details](#)

[View Tasks](#)

Edit Task Details

Update any details of a task. The “Edit Tasks” user permission is required.

1. In one of these locations, find the task you want to edit:
 - **A task list.** From the navigation menu, tap **Tasks**. Choose a list, then tap the task you want to edit.
 - **An activities related list.** In a record view, swipe to the related information page. Tap **Open Activities** or **Activity History** to see tasks related to the record. Tap a task you want to edit to see the task’s record view.
2. Tap  from the action  menu on the action bar.
3. Make your changes and tap **Save**.

SEE ALSO:



[Close or Reopen Tasks](#)

[View Tasks](#)

Create Tasks

Create a task on the spot, whether you're working with your whole task list or just an individual record.

1. Do one of the following:

- **Go to any task list.** Tap **New Task**.
- **Go to a record you're working on or your main feed.** Tap  in the action bar. (The  icon may not be available for some or all objects, depending on your organization's settings.)

2. Enter task details and tap **Save**.

SEE ALSO:


[View Tasks](#)


[About Task Lists](#)

ANALYZE YOUR DATA

View Your Dashboards

You can view the same dashboards in Salesforce1 that you're able to access in the full Salesforce site.

1. Tap  to open the navigation menu.
2. Tap **Dashboards**.

 **Note:** If you have permissions to view dashboards in the full site but the **Dashboards** item doesn't appear in the navigation menu, ask your administrator to add dashboards access to the mobile app.


3. Tap a dashboard in the list of recently viewed dashboards to open it. Or search for a dashboard that isn't in the recent list.
4. If you're working on a smartphone or using the Android downloadable app, swipe right or left in the dashboard view to see all of the dashboard's columns, or move directly to a specific column by tapping its position in the page indicator. Swipe vertically through a column to see all of dashboard components. (If you're using a tablet, up to three columns of components are displayed on the page, reducing the need to swipe through the columns.)

Information, such as the running user or the last refresh date, is displayed in the highlights area at the top of the dashboard view.

Drill Down from a Dashboard to a Report

When viewing a dashboard, you can tap a dashboard component to see the report that's delivering the data to the dashboard. This is available for matrix, summary, and tabular reports.

You can see a maximum of 2,000 records. To see all records, log into the full Salesforce site.

 **Tip:** When you drill from a dashboard to a report, you may see slightly different data in the report view from what you saw in the dashboard view. This is because the data displayed in a dashboard is from the last dashboard refresh (the date and time are shown in the dashboard header), but drilling down to a report actually runs the report, so in this case you're seeing the most current report data.

Some tips when working with reports in Salesforce1:

Stay in Context with Floating Report Headers

As you scroll down to read a report, the header rows at the top always stay visible.

Access Columns That Are Off the Screen

If all of the columns in a report don't fit on your device's screen, swipe right or left to see all the columns. The first column is anchored and can't be moved off the screen.

Truncated Text in Report Columns


To fit multiple columns on a small mobile screen, parts of the content of a field (the middle words of a text field or the trailing digits for a numeric field) may be dropped out. Tap the field to see the full text.

Sort Reports

You can easily sort numeric and text fields. Tap a numeric field to sort in descending order; tap it again to reverse the sort order. Tapping a text field sort from A to Z or tap it again to sort from Z to A.

View Your Reports

You can view your recently viewed reports from the Salesforce1 navigation menu. To access other reports, drill into them from dashboards.

1. Tap  to open the navigation menu.
2. Tap **Reports**.

All reports are shown in tabular format, with groupings added as columns to the end of the report. For example, on a summary report grouped by Industry and Type, those fields appear as the last two columns of the report.

Reports with the joined format aren't shown.

WORK WITH FILES

Files You Can Access

Files you own and have access to are available to share or attach to Chatter posts, comments, and record feeds. Salesforce Files is available for organizations that have Chatter enabled.

Access Files from the Recent section in the Salesforce1 navigation menu. From the Files list, you can:


- See all the files you own or have access to, and [filter your list of files](#).
- Tap **i** to view file information, including the owner, file version, and who the file is shared with.
- Upload private photos or upload and share photos with people, groups, or via email. (*Downloadable apps only*)
- Search for files by filename. In the downloadable apps, you can also search by owner name.
- Access your files without a network connection by making a file available offline. (*Downloadable apps only*)

Files Filters

You can filter the list of files to make it easier to find what you want. Tap ▼ at the top of the Files list.

- **Recent:** The most recent files you've viewed.
- **Synced:** All files that have been synced in your Salesforce Files Sync folder. This filter is available if Salesforce Files Sync is enabled for your organization and if you have the "Sync Files" permission.
- **Owned By Me:** Only the files you own.
- **Shared With Me:** Only the files that have been shared with you by either a private share or a public post to your profile.
- **Following:** Only the files that you're following on Chatter. (*Mobile browser app only*)
- **Offline:** The files that you've marked for offline access. (*Downloadable apps only*)

In the mobile browser app only, external files are accessible from the Files list if Files Connect is set up for your organization and if you have connected file sources. You can browse and share files from external sources such as Microsoft SharePoint and OneDrive for Business. Relevant external files appear in the Files list when the Recent, Owned by Me, Shared With Me, or Following filters are applied. If the Files list is collapsed, an External section lets you navigate directly to outside files.

 **Note:** If you're using the mobile browser app in Safari on an iOS device with iOS 7 or later, you must disable the Safari pop-up blocker setting to access external files. On your iOS device, go to **Settings > Safari** and disable **Block Pop-ups**.

SEE ALSO:

- [Upload a Photo](#)
- [Share a File](#)
- [Find a File](#)
- [Access Files When Offline](#)
- [Add a Folder](#)

Upload a Photo

Easily upload photos from your device to Salesforce Files, so you can share them with your coworkers and business contacts.

In a downloadable app:




1. On the Files home page, tap **Add**.
 - Tap **Use Latest Photo** to automatically upload the most recent photo taken with your device. *(iOS downloadable app only)*
 - Tap **Take Photo**, snap a picture with your device's camera, then tap **Use Photo**.
 - Tap **Pick from Camera Roll**, select an existing photo on your device, then tap **Upload**.

In the mobile browser app:

1. Tap the new icon in the action bar.
 - Tap **Take Photo or Video**, snap a picture with your device's camera, then tap **Use Photo**.
 - Tap **Choose Existing**, then select an existing photo on your device.


Share a File

Share files with your coworkers and business contacts. This option is available in the downloadable apps only.

1. Tap a file to view it.
2. On an iOS device, tap .
On an Android device, tap  then select .
3. Tap **Share with People or Groups**.
4. Enter the name of the people or groups you want to share the file with.
5. Tap **Share**.

Find a File

You can search for files by filename. In the downloadable apps, you can also search by owner name.


On the Files home page, drag down on the page to expose the search box, then enter your search terms. (In the mobile browser app, tap  in the header to access the search box.)

You can also use global search to find Files. See [Find Items with Global Search](#) on page 16 for details.

Add a Folder


Create a folder to store and organize your files. Folders are available if Salesforce Files Sync is enabled for your organization. This feature is available in the downloadable apps only.

In the iOS downloadable app:

1. Tap  on the Files page to select the **Synced** view, then tap **Add**.
2. Tap **Create Folder**.
3. Enter a name for your folder.

4. Tap **Save**.


In the Android downloadable app:

1. Tap  on the Files page to select the **Synced** view, then tap **Add**.
2. Tap **New Folder**.
3. Enter a name for your folder.
4. Tap **Add**.



Access Files When Offline

Access files securely on your device when you don't have a network connection. This feature is available in the downloadable apps only. Mark the files that you'd like to see when you're working offline.


In the iOS downloadable app:

1. Tap a file to view it.
2. Tap .

In the Android downloadable app:

1. Tap a file to view it.
2. Tap .
3. Tap .

Use the Offline filter on the Files home page to see all files marked for offline access.



Remove an offline file from your device by tapping .

MANAGE SALESFORCE1



Connect to a Different Instance

By default, the Salesforce1 downloadable apps are set up to connect to your production environment. If you want to connect to your sandbox environment for testing purposes or redirect to a single sign-on location, you can configure the app to point to a different page during login.

To change the login host when using the iOS downloadable app:

1. On the Log In page, tap .
2. Tap **+** to add a new login host.
Or select one of the predefined instances: **Production** or **Sandbox**.
3. Enter the host name of the new instance.
 **Important:** Don't include `http://` in the host name.
4. Enter a label for the new instance, if desired.
5. Tap **Done**.
6. Tap the name of the newly created instance, then log in.

To change the login host when using the Android downloadable app:

1. On the Log In page, tap either  or the menu button on your device.
2. Tap **Change Server**.
3. Tap **Add Connection**.
Or select one of the predefined instances: **Production** or **Sandbox**.
4. Enter the host name of the new instance and enter the URL you use to log in to that instance, then tap **Apply**.
 **Important:** The URL must start with `https://`.
5. Tap the name of the newly created instance, then tap **Apply**.
6. Log in.

INDEX

A

- accessibility
 - app navigation [3](#)
 - mobile [3](#)
- Account matching
 - Today [28](#)
- accounts
 - calling [22](#)
 - edit Twitter profile associations [23](#)
 - log without calling [22](#)
 - mapping addresses [23](#)
 - viewing websites [23](#)

C

- calling
 - accounts [22](#)
 - contacts [22](#)
 - leads [22](#)
- change task details [36](#)
- close a task [35](#)
- Conference calls
 - Today [30](#)
- Contact matching
 - Today [28](#)
- contacts
 - calling [22](#)
 - edit Twitter profile associations [23](#)
 - log without calling [22](#)
 - mapping addresses [23](#)
 - send email [22](#)
- create a task [37](#)
- create event [33](#)

D

- dashboards
 - app navigation [38–39](#)
 - mobile [38–39](#)
- Data
 - Salesforce1 [5](#)
- Data Entry
 - in Salesforce1 [20](#)
- Dial in to conference calls
 - Today [30](#)
- Directions to a meeting
 - Today [31](#)

E

- edit task details [36](#)
- Event management
 - Today [27](#)

F

- Files
 - overview [40](#)
 - search [41](#)

L

- leads
 - calling [22](#)
 - edit Twitter profile associations [23](#)
 - log without calling [22](#)
 - mapping addresses [23](#)
 - send email [22](#)
- log without calling
 - accounts [22](#)
 - contacts [22](#)
 - leads [22](#)

M

- mapping addresses
 - accounts [23](#)
 - contacts [23](#)
 - leads [23](#)
- Meeting location
 - Today [31](#)
- Meeting preparation
 - Today [29](#)
- Mobile [4, 6, 9](#)

N

- Notifications [8](#)

O

- Online meetings
 - Today [30](#)

P

- Person account matching
 - Today [28](#)
- Prepare for a meeting
 - Today [29](#)

R

- Records
 - create [20](#)
 - edit [19](#)
 - entering data [20](#)
 - Lookup Cards [18](#)
 - Related Lists [18](#)
 - Salesforce1 [7](#)
 - view in Salesforce1 [18](#)
 - Visualforce Cards [18](#)
- reopen a task [35](#)
- Requirements
 - Salesforce1 app [1](#)
- Running late messages
 - Today [31](#)

S

- Sales Path [25–26, 38](#)
- Sales Process [25–26, 38](#)
- Salesforce1
 - Overview [1](#)
 - Supported data [5](#)
 - Today [27–31](#)
- Salesforce1 app
 - Requirements [1](#)
- Search
 - feed [12](#)
 - global [16](#)
 - overview [14](#)
 - recently accessed objects [14](#)
 - records and list views [15](#)
 - tips [16](#)

- send email
 - contacts [22](#)
 - leads [22](#)
- social accounts, contacts, and leads
 - edit Twitter profile associations [23](#)
 - People in Common [24](#)

T

- task lists [34](#)
- Time management
 - Today [27](#)
- Today
 - Conference call dialer [30](#)
 - Connect calendars [27](#)
 - Meeting location [31](#)
 - Meeting preparation [29](#)
 - Record matching [28](#)
 - Running late messages [31](#)
 - Salesforce1 [27–31](#)
 - Supported conference call invitation formats [30](#)
 - Supported conference call providers [30](#)
- types of task lists [34](#)

U

- User matching
 - Today [28](#)

V

- view events [33](#)
- view tasks [35](#)
- viewing websites
 - accounts [23](#)