Using the Salesforce1 Mobile App

Salesforce, Spring '17

'17

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GET STARTED

Welcome to the Salesforce1 Mobile App

The Salesforce1 mobile app is Salesforce on the go! You get real-time access to the same information you see in the office, but organized for getting work done in those precious free moments between customer meetings, waiting for a flight—even when you're in line for coffee. You can easily review details, update data, and create new records with just a few taps. And the app includes many of your org's customizations, so the app is tailored to your actual business needs.

> 📝 **Note:** Salesforce1 puts key data and features at your disposal, wherever you are. But there are business activities that are probably better done from your laptop or desktop. To see data or do actions that aren't available in Salesforce1, use Lightning Experience or Salesforce Classic 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 content covers all of the *flavors* of Salesforce1. And it assumes that your org is using the default, out-of-the-box configuration of the app. If your app is missing an option that looks useful, ask your admin if the feature was disabled.

Requirements for Using Salesforce1

Salesforce1 is available for most Salesforce editions and user license types. The app is supported on a variety of mobile platforms, with some minimum operating system and mobile browser requirements.

Mobile Platform Requirements

Salesforce1 is available on phones and tablets that meet these mobile platform requirements.

Operating System and Version Requirements	Mobile Browser Requirements[*]
Android 4.4 or later	Google Chrome on Android Good Browser on Android
iOS 10.0 or later	Apple Safari on iOS Good Browser on iOS
Windows 10 *(Mobile browser app only)*	Microsoft Edge on Windows 10 phones only
Windows 8.1 *(Mobile browser app only)*	Microsoft Internet Explorer 11 on Windows 8.1 phones only *(Support ends December 17, 2017)*

[*] Mobile browser requirements apply to the Salesforce1 mobile browser app only.

- The latest mobile browser version is required.

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

Minimum platform requirements are subject to change, with or without advance notice.

Mobile Devices Used for Salesforce1 Testing

Salesforce performs automated and manual testing of the Salesforce1 downloadable and mobile browser apps on a select set of mobile devices. This is the current list of devices used for Salesforce1 testing.

Platform	Phones	Tablets
Android	- Google Nexus 5X - Google Nexus 6P - Samsung Galaxy S7 - Samsung Galaxy S6 - Samsung Galaxy S5 - Samsung Galaxy S4 - Samsung Galaxy Note 4	- Samsung Galaxy Tab S2 - Samsung Galaxy Tab A 8.0
iOS	- iPhone 7 / 7 Plus - iPhone 6S / 6S Plus - iPhone 6 / 6 Plus - iPhone 5S - iPhone SE	- iPad Pro (9.7" and 12.9") - iPad Air 2 - iPad Mini 4
Windows *(Mobile browser app only)*	- Nokia 1020 (with Windows 8.1) - Lumia 950 (with Windows 10)	- n/a

Customers aren't blocked from using Salesforce1 on untested devices as long as they meet current platform requirements. The list of Salesforce1-tested devices is subject to change, with or without advance notice.

> ✏️ Note: Salesforce treats touch-enabled laptops, including Microsoft Surface and Surface Pro devices, as laptops instead of tablets. It's not possible to access Salesforce1 on these devices. Users are always redirected to the full site experience that's enabled for them—Lightning Experience or Salesforce Classic. Only standard keyboard and mouse inputs are supported on these types of devices.

On most devices, Salesforce1 is supported in portrait orientation only. The one exception is when using the Salesforce1 downloadable app on iPad tablets, where both portrait and landscape orientation are supported.

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, and create and edit 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.
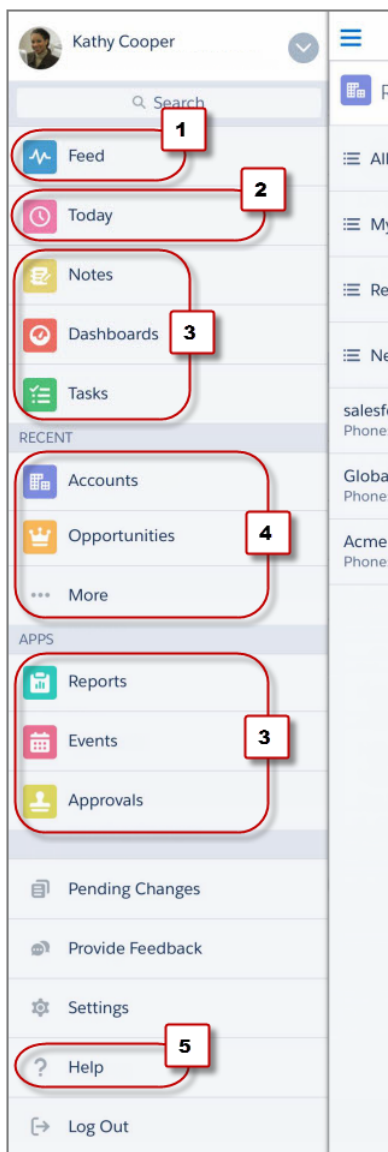
SALESFORCE1 BASICS

Getting Around in Salesforce1

Get to your data using the Salesforce1 navigation menu and a few simple gestures.

When you log in to Salesforce1, you see your landing page. Depending on how your admin has set up things up, 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's available in the navigation menu also depends on how your admin has set up Salesforce1. You may see:

– Your Chatter feed (1). 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 notes, task lists, Salesforce events calendar, dashboards and reports, and your org'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.

- On iPad devices, Salesforce1 is supported in both portrait and landscape orientation. On all other supported devices, the app is supported in portrait orientation only.

SEE ALSO:

Search Overview

Records in Salesforce1

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. You see most of the objects, record types, fields, and page layouts that you do when working in the full Salesforce site. But not all Salesforce data is available in Salesforce1.

If Chatter is enabled, you can access feeds, groups, people (user profiles), and topics. (Topics is available in the mobile browser app only.)

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 as items in the Salesforce1 navigation menu. You can create, view, and edit records for these objects unless noted otherwise.

- Accounts
- Assets
- Campaigns
- Cases
- Contacts
- Content Libraries *(iOS downloadable app only)*
- Contracts
- D&B Company *(view only, for Data.com Prospector and Data.com Clean customers)*
- Dashboards *(view only)*

- Events
- Files
- Field Service Lightning (Operating Hours, Service Appointments, Service Resources, Service Territories, Work Types) *(mobile browser app only)*
- Forecasts *(iOS downloadable app only)*
- Knowledge Articles *(view only)*
- Leads
- Live Chat Transcripts
- Opportunities
- Orders
- Quotes (*create from opportunities only*)
- Reports (*view only*)
- Social Personas and Social Posts
- Tasks
- Work.com Coaching, Goals, Thanks, Rewards, and Skills *(Skills not available in the iOS downloadable app)*
- Work Orders
- Custom objects that have a tab you can access
- Salesforce Connect external objects that are searchable and 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 these 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.
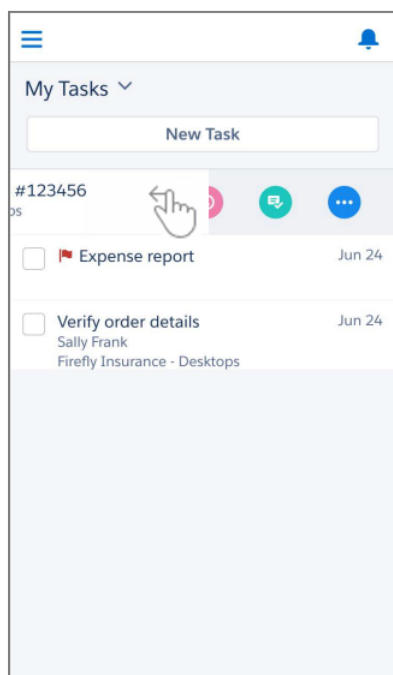
The action bar and list item actions show the three or four most relevant actions for the page you're viewing. To see the complete set of actions that are available, tap ⬤. This opens the action menu.

> **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.

Records in Salesforce1

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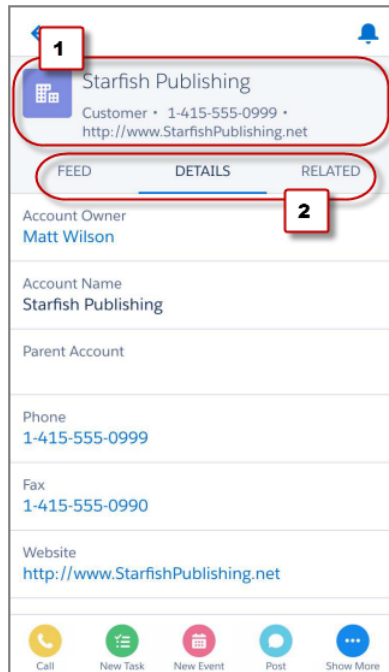
Depending on the object, the record view may include the record's feed page, the record detail page, and the related information page. For most objects, the record view opens on the record detail page. Swipe, or tap on the desired tab, to move between the pages (2).

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 Your Communities

What to Expect if Your Org Doesn't Use 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**, and **Groups** 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

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 the downloadable app for iOS devices, simply double-tap the post you want to bookmark.

For the other Salesforce1 apps:

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 the downloadable app for iOS devices, double-tap the bookmarked post. In the other Salesforce1 apps, 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.
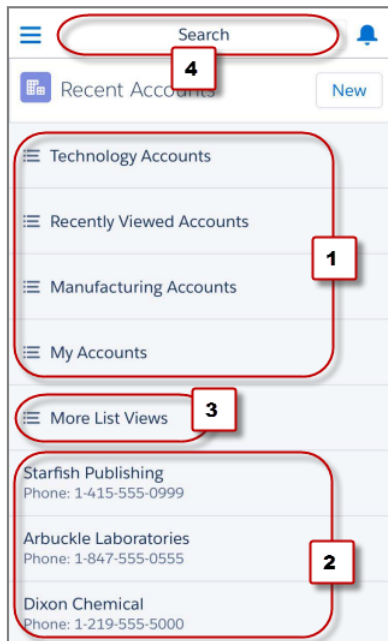
- If you've accessed five or more list views in the full site, the **More List Views** option displays (3). Tap this option to see up to 200 standard and custom list views for the object. (In the mobile browser app, this option is available regardless of the number of list views you've used in the full 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 Your Communities

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)` doesn'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 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 insights 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.
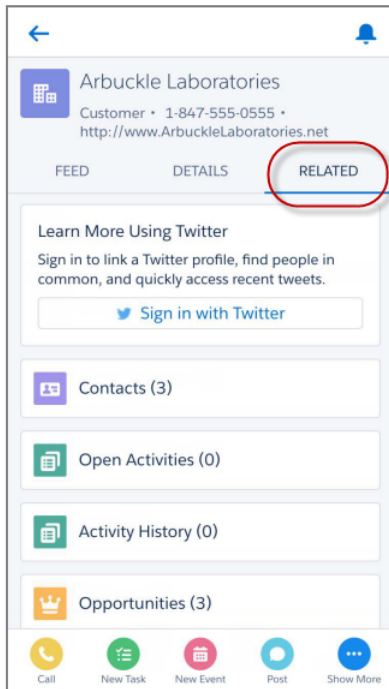
2. Scroll the page to see the available related lists and other cards. At the bottom of the page, you may need to pull up to load additional cards.

   - Use the Account Insights card to see top news items for accounts. If you don't see this card on your accounts or opportunities, ask your administrator to enable Account Insights.

   - 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 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. The easy-to-read counter shows if a related list contains records.

   - 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.

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**.

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 with Twitter** and log in to Twitter. Then tap **Link Twitter Account** and select the appropriate profile.

- To change the Twitter profile association, tap ⚙️, then tap **Change Association**.

- To remove the Twitter profile association, tap ⚙️, then tap **Remove Association**.

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

Take Notes

Use enhanced Notes to keep track of important information. You can create general notes or associate notes with specific records.

To create a general note, select **Notes** from the Salesforce1 navigation menu then tap **New**. To create a note that's directly related to a specific record, tap in the record's action bar.

When working with Notes, you can:

- Relate a note to other records by tapping **Relate Records**. Change or remove currently related records by tapping the related record names.
- Instantly create a task from a note by swiping to the right on any line, bulleted item, or numbered item.

  Tap ✔ to view related tasks and mark tasks complete. You can also work with these tasks from your task list.

- Add bulleted and numbered lists to notes using the formatting bar.
- Add images to notes using the formatting bar. You can take a picture with your device's camera or select an existing image. (Available in the Salesforce1 downloadable app for iOS only.)

To access the formatting bar in the Salesforce1 downloadable app for iOS, tap the body of the note. The formatting bar is always visible at the top of the note in the other flavors of Salesforce1.

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.
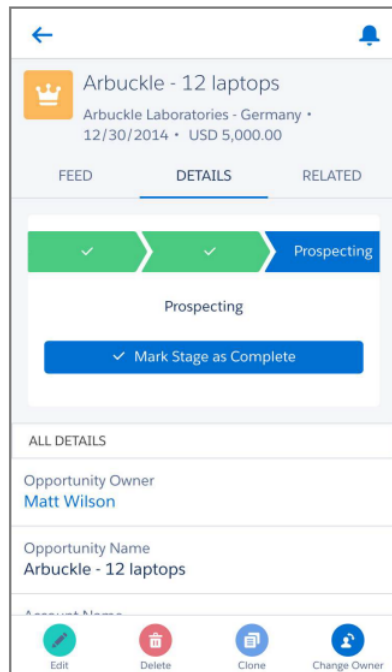
If it turns out you marked a stage as complete too soon, you can easily go back to an earlier stage. Select the stage name then tap **Mark as Current Stage** or change the stage in the opportunity record. Fast tracking a sale? You can skip ahead to a later stage using the same process.
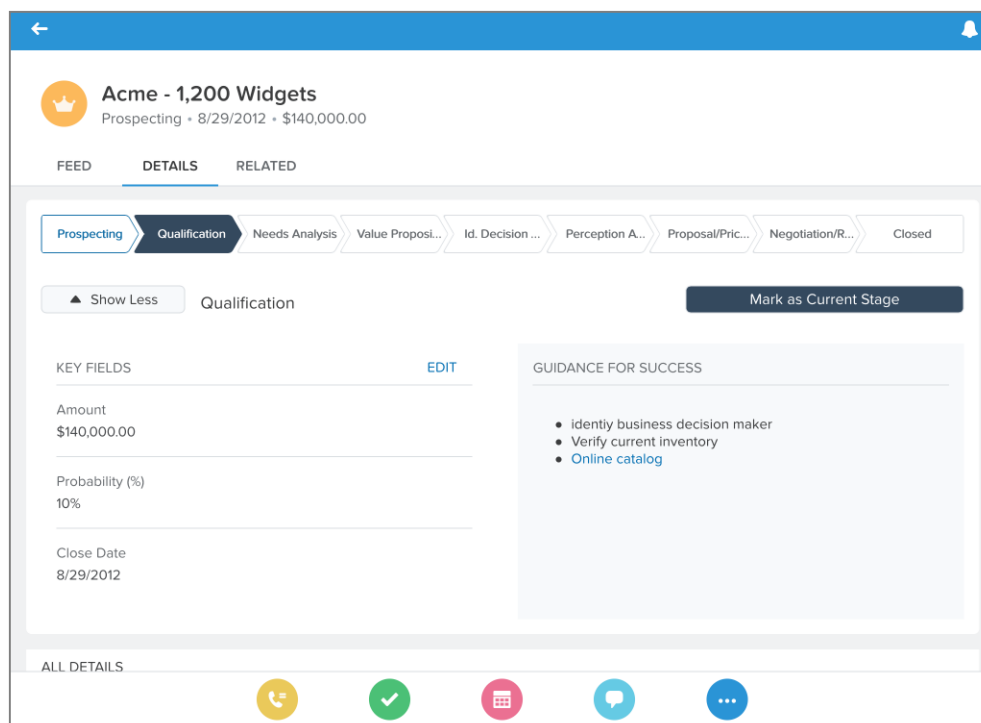
When you're working with an opportunity, you can hide Sales Path by tapping **Show Less** and recall it by tapping **Show More**. In either case, the entire opportunity, including all of its fields, appears under **All Details**.

Convert Leads to Contacts

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

To convert qualified leads to contacts, open the lead record and tap in the action bar. (If you don't see this option, ask your admin to enable it.)

Choose Lead Sources

You can choose to keep lead sources from the existing contacts or replace the lead sources with the ones from the converted leads.

Prevent Duplicates

If Duplicate Management is enabled for your org, Salesforce1 warns you if you're about to create a duplicate contact or account.

Create Accounts and Opportunities

Save time by creating the accounts and opportunities that you and your team need, right from the lead conversion process.

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.

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.

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.)

1. From the event list in Today, tap an event card.

2. Tap 🗺 in the action bar.

3. Tap on the location marker to get directions from your current location to the meeting.

4. 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.)

1. From the event list in Today, tap an event card.

2. Tap ✉ in the action bar.

3. Tap an appropriate quick message or tap **Write your own...** to create a custom email message.

4. Tap **All** to send the message to everyone involved in the meeting or select a specific person to contact.

5. 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.

KEEP TRACK OF YOUR MEETINGS AND TASKS

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 12 future weeks and 4 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**.

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.

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 ☑.
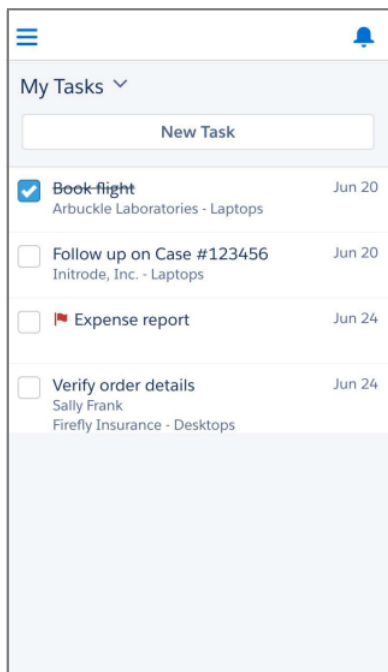
Considerations for closing and reopening tasks:

- 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:

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 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 appears as the last two columns of the report.

Reports with the joined format aren't shown.

ACCESS 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. Salesforce Files is available in the mobile app for organizations that do not use Chatter.

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 🛈 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. This filter is available if Chatter is enabled for your organization. (*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 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 ⬇.

WORK OFFLINE WITH SALESFORCE1

Your productivity doesn't have to stop just because your mobile device is offline or can't otherwise connect to Salesforce. If your org has enabled Salesforce1 caching and Offline Edit, you can keep working from literally anywhere—your subway commute, 30,000 feet in the sky in airplane mode, even bunker-style buildings with spotty cellular connectivity. Offline access is available for the Salesforce1 downloadable apps only. The beta version of Offline Edit requires version 10.0 of Salesforce1 for Android or Salesforce1 for iOS.

Access the Data That You Need While Offline

When Salesforce1 offline access is enabled for your org, you can keep working when your mobile device doesn't have connectivity. Salesforce1 saves your recently accessed records in a *cache* that remains available when the app can't connect to Salesforce. The contents of your cache determines the data that you can access when you're offline. Offline access is available for the Salesforce1 downloadable apps only.

Create, Edit, and Delete Records While Offline (Beta)

When the Salesforce1 Offline Edit beta feature is enabled for your org, you can keep creating, editing, and deleting records when your mobile device doesn't have connectivity. You can do these actions for any object or record that's currently stored in your cache. The beta version of Offline Edit requires version 10.0 of the Salesforce1 downloadable app for Android or the Salesforce1 downloadable app for iOS.

Resolve Conflicts for Offline Changes (Beta)

When you're back online, Salesforce1 automatically syncs all your pending edits and new and deleted records with Salesforce. If there are changes that Salesforce1 can't sync because of data conflicts in Salesforce, the app helps you resolve the conflicts. The beta version of Offline Edit requires version 10.0 of the Salesforce1 downloadable app for Android or the Salesforce1 downloadable app for iOS.

What's Supported Offline

With Salesforce1 caching and Offline Edit, you can keep working with many of your frequently accessed objects and records when your mobile device can't connect to Salesforce. Here's the complete list of what you can do while offline. The beta version of Offline Edit requires version 10.0 of the Salesforce1 downloadable app for Android or the Salesforce1 downloadable app for iOS.

Access the Data That You Need While Offline

When Salesforce1 offline access is enabled for your org, you can keep working when your mobile device doesn't have connectivity. Salesforce1 saves your recently accessed records in a *cache* that remains available when the app can't connect to Salesforce. The contents of your cache determines the data that you can access when you're offline. Offline access is available for the Salesforce1 downloadable apps only.

Because the state of your cache is key to having a productive offline experience, let's look at how it's initially populated and then updated throughout a Salesforce1 session.

> 📝 **Note:** What exactly is a Salesforce1 session? It's the time between logging in and logging out of the app. Switching away from Salesforce1 doesn't end your session.

- When you log in to Salesforce1, your cache is empty. If you go offline with an empty cache, you can't access any of your data.
- You can quickly populate your cache with a default set of your most recently accessed records. From the Salesforce1 navigation menu, select **Settings** > **Offline Cache** > **Cache Now**.

> 💡 **Tip:** We recommend that you do this action shortly after logging in so you have a meaningful set of data available if you find yourself suddenly offline.
>
> Caching can take a few seconds to a couple of minutes. It depends on the size and complexity of your records. If you go offline before the cache is fully updated, you won't have access to all the records you expect.

The **Cache Now** option collects your recently accessed records for the first five objects listed in the Recent section of your Salesforce1 navigation menu, plus your recent tasks and dashboards. This includes records that you accessed recently in both Salesforce1 and the full Salesforce site (Lightning Experience and Salesforce Classic).

- As you work in Salesforce1, your cache is continually updated with many of the other records that you access during your session. (Not all Salesforce data is available offline—see What's Supported Offline.)

- Your default set of recently accessed records obviously needs to evolve as you work in Salesforce1 and the full site. If you switch away from Salesforce1 (without logging out) and the cache is over an hour old, the app automatically refreshes the cache to pick up your most recent tasks, dashboards, and records for your top five objects.

  If you know you're going offline and there are records that you accessed recently in the full site that you want in the Salesforce1 cache, manually refresh the cache with the **Cache Now** option.

- A record remains in your cache for two weeks. Each time you access the same record, its clock resets. But if you don't work with the record within two weeks, it's automatically removed from the cache and won't be available offline until you access it again.

- Logging out of Salesforce1 removes all data from your cache. The next time you log in, your activities in the app begin generating a new cache.

Create, Edit, and Delete Records While Offline (Beta)

When the Salesforce1 Offline Edit beta feature is enabled for your org, you can keep creating, editing, and deleting records when your mobile device doesn't have connectivity. You can do these actions for any object or record that's currently stored in your cache. The beta version of Offline Edit requires version 10.0 of the Salesforce1 downloadable app for Android or the Salesforce1 downloadable app for iOS.

> 📝 **Note:** The Salesforce1 downloadable apps contain a beta version of Offline Edit, which means it's a high-quality feature with known limitations. Offline Edit isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. You can provide feedback and suggestions for Offline Edit in the IdeaExchange in the Success Community.

Offline Edit is available if you see the **Pending Changes** item at the end of the Salesforce1 navigation menu.
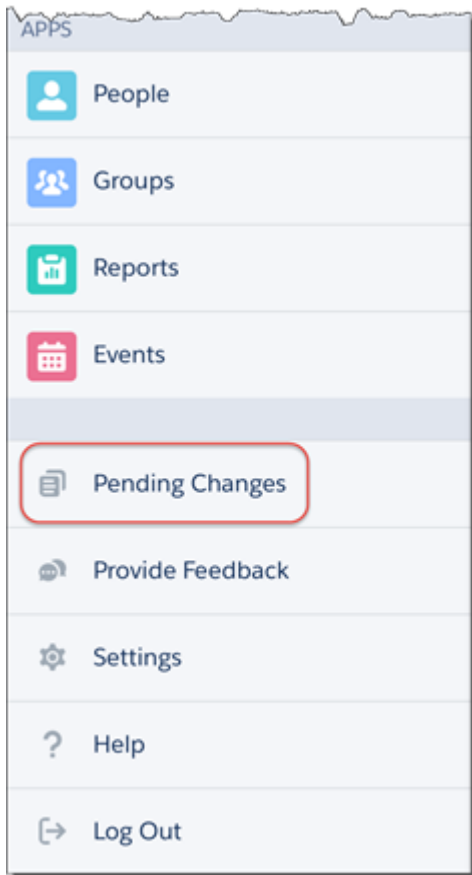
When offline:

- Create a record using the **New** button on an object home page. (For tasks, use the **New** button on the My Tasks list.) The "new record" actions in an action bar (such as **New Task** or **New Contact**, or **New** on related lists) don't work offline.
- Update the details of a record using the **Edit** action on the record's action bar.
- Delete a record using the **Delete** action on the record's action bar.

Changes made while offline are pending until they're synced back to Salesforce when you're back online.

You can see that a record has pending changes by the   indicator that displays on the object home page for the record and directly in the highlights area on the record. You can keep track of all your pending changes from the Pending Changes page.

As Offline Edit isn't generally available yet, there are some limitations when creating, editing, or deleting records while offline.

- Except for **Edit** and **Delete**, all other actions in the action bar are unavailable. This includes the actions for logging a call, posting to a feed, changing the status of a task, and so forth.
- A maximum of 15 record types for each of your Recent objects is available.
- Dependent lookups and picklists for a cached record aren't available unless you interacted with them before the record was cached.
- Lookup filters don't work.
- Notes that include images aren't available. Nor can you add images to notes or relate notes to other records.
- If you can't create tasks from the My Tasks list, your admin needs to make a settings change.

- You can't select or deselect checkboxes on tasks.

SEE ALSO:

Resolve Conflicts for Offline Changes (Beta)

When you're back online, Salesforce1 automatically syncs all your pending edits and new and deleted records with Salesforce. If there are changes that Salesforce1 can't sync because of data conflicts in Salesforce, the app helps you resolve the conflicts. The beta version of Offline Edit requires version 10.0 of the Salesforce1 downloadable app for Android or the Salesforce1 downloadable app for iOS.

Salesforce1 alerts you if it's unable to sync any of your pending changes back to Salesforce. To resolve sync problems, respond to the pop-up message or select **Pending Changes** from the Salesforce1 navigation menu and select the affected record. Salesforce1 guides you through the issues you need to resolve.

> **Note:** We recommend that you address sync problems as soon as possible to avoid the introduction of more conflicts. Records with unsynched changes are locked until you resolve the problems.

There are two categories of problems you may encounter:

- indicates that there are issues you need to resolve, such as a pending change conflicts with an update made by another user or there are validation errors you need to fix.

  After you fix the necessary fields and save the record, Salesforce1 tries again to sync your pending changes to Salesforce.

- indicates there's an unresolvable error and your changes can't be synced to Salesforce. Unresolvable errors are rare, typically occurring if someone deleted the record or removed your access permissions while you were offline.

  Your only option in this case is to remove the record from the Pending Changes page by tapping it. Then ask your admin for help resolving the problem that blocked Salesforce1 from syncing your changes.

SEE ALSO:

What's Supported Offline

With Salesforce1 caching and Offline Edit, you can keep working with many of your frequently accessed objects and records when your mobile device can't connect to Salesforce. Here's the complete list of what you can do while offline. The beta version of Offline Edit requires version 10.0 of the Salesforce1 downloadable app for Android or the Salesforce1 downloadable app for iOS.

Salesforce Data / Salesforce1 Element	Available for Offline Viewing	Available to Create, Edit, or Delete Offline (Beta)
Navigation Menu	Yes	n/a
Action Bar	Yes	Edit action: Yes
		Delete action: Yes

Salesforce Data / Salesforce1 Element	Available for Offline Viewing	Available to Create, Edit, or Delete Offline (Beta)
		Other actions: No
Global Search	Previous search results from current session	n/a
List Views	If viewed in current session	No
Records for Recent Objects	Yes, recently accessed records for the first five objects (excluding Files) in the Recent section of the Salesforce1 navigation menu	Yes, recently accessed records for the first five objects (excluding Files) in the Recent section of the Salesforce1 navigation menu
Records for Other Objects	If viewed in current session	If viewed in current session
Related Records	If viewed in current session	If viewed in current session
Salesforce Today	Main page and mobile event records, if viewed in current session	No
Salesforce Events	If viewed in current session	Create: No Edit and Delete: If viewed in current session
Tasks	Most recently accessed tasks from the first page of My Tasks list only	Most recently accessed tasks from the first page of My Tasks list only (The simplified New Task form must be disabled)
Notes	If viewed in current session	Create: Yes Edit: If viewed in current session Delete: No
Files	If viewed in current session	No
Dashboards (Enhanced Charts)	Most recently accessed only	No
Dashboards (Legacy Charts)	No	No
Feeds, Groups, and People	If viewed in current session	No
Notifications	If viewed in current session	n/a
Approvals (submit, approve, or reject)	No	No
Visualforce pages	No	No
Canvas Apps	No	No
Lightning Pages	No	No
Salesforce1 Settings	Yes	n/a

A Salesforce1 session is the time between logging in and logging out of the app. Switching away from Salesforce1 doesn't end the session as long as the user doesn't log out.

SWITCH BETWEEN USERS, ORGS, AND COMMUNITIES

Switch Between Users

With the Salesforce1 downloadable apps, you can quickly switch between multiple users—even across different orgs and instances—without entering usernames and passwords each time. Add the login credentials for all the users you frequently access to the user switcher. Then it's just a few taps whenever you want to switch contexts.

1. Tap ☰.

2. Tap ⌄ next to your avatar at the top of the navigation menu to open the user switcher.

3. To switch to a user for the first time, tap ✚ . You're directed to the Salesforce1 login page, where you enter a username and password—and select a different org or instance, if needed.

   When the user's credentials are authenticated, Salesforce1 logs you in as the new user and the username is added to the user switcher.

4. To access any user already in the user switcher, tap the username. You switch immediately, without needing to enter login credentials.

When you switch to a different user, the Salesforce1 navigation menu changes to show the objects, apps, and other items that are available to that user.

To remove a user from the user switcher, simply log out from the navigation menu.

SEE ALSO:

Log In to Different Instances

Log In to Different Instances

By default, the Salesforce1 downloadable apps are set up to connect to your production environment. If you want to log in to a single sign-on location, a different org, or perhaps your sandbox environment to do some testing, 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.

Access Your Communities

You can use Salesforce1 to switch between your internal org and any of the Salesforce Communities that you're a member of. This option is available if you have a Customer Community, Partner Community, or other supported portal license.

- Tap ☰ then tap the user switcher arrow at the top of the navigation menu and select the community you want to access.
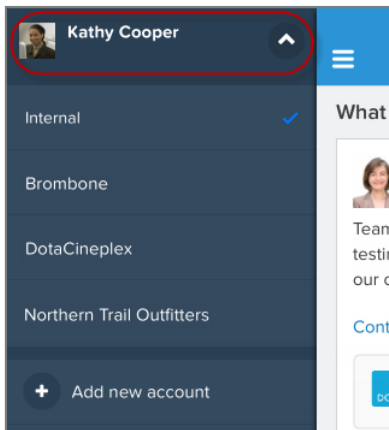
- To switch back to your internal org, tap ☰ then tap the user switcher arrow next to the community name and select *<Company name>* **Internal**.

When you switch to a community:

- The communities you see in the user switcher are based on the internal org and username that you're currently using. If you switch to a different user from the user switcher, the list of available communities may change.

- 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

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