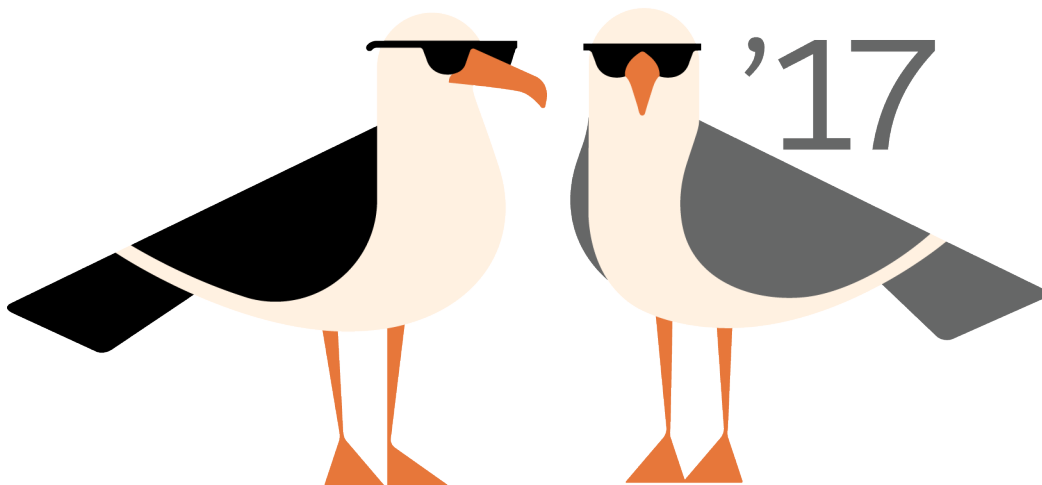




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# Salesforce1 Help

Salesforce, Summer '17





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# SALESFORCE1 MOBILE HELP

Thank you for downloading the Salesforce1 mobile app! If you're having trouble using Salesforce1, don't worry—you've come to the right place. Browse by topic or search using keywords to find what you need.

Keep in mind that some Salesforce features aren't available on the Salesforce1 mobile app. To use desktop features, use the full Salesforce site.

## Get Started With Salesforce1

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Get up and running in no time with our guide to the basics of the Salesforce1 mobile app! Learn everything from how to set up your notification preferences to how our accessible features work.


## Set Up Salesforce1

Learn how to change your notification preferences, switch between accounts, and log in to different instances.

### Notifications

Salesforce1 uses notifications to alert you when key events occur—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. You can choose which types of push notifications you receive, if you want to receive them at all, by tapping  then selecting **Settings > Push Notifications Settings**. However, you can't receive push notifications if your Salesforce admin disabled them.

*In-app notifications* are alerts that you receive while you're using Salesforce1. By tapping , you can view the 20 most recent notifications you received in the last 90 days. If you tap on a notification, Salesforce1 displays it in full.


### Switch Between Your Accounts

Logging in to multiple accounts is hassle-free with Salesforce1—after you've logged in to an account once, you can switch accounts with just a few taps.

With the Salesforce1 downloadable apps, you can quickly switch between multiple accounts—even across different orgs and instances—without entering your account's username and password each time. After you've logged in to Salesforce1 with each of your accounts once, it's just a few taps whenever you want to switch between accounts.

1. Tap .
2. Tap  next to your avatar at the top of the navigation menu to see all of your accounts.
3. To switch to a different account for the first time, tap . You're directed to the Salesforce1 login page, where you enter your new account's username and password. You can also select [a different org or instance](#) if needed.

When your account's credentials are authenticated, Salesforce1 logs you in to the new account. The username is added to the account switcher.

4. To access any account you've already logged in to, tap , then tap the username. You switch to the new account immediately, without needing to enter your password.

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



To remove an account, simply log out from the navigation menu.

## Log In to Different Instances

By default, Salesforce1 connects to your production environment. But by following a few steps, you can log in to a different instance, like a single sign-on location.

By default, the Salesforce1 downloadable apps are set up to connect to your production environment, but 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.

## Learn About Today

Today in Salesforce1 keeps your day on track, from beginning to end.

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 under Current Events and in your Agenda. When it's time to prepare for a meeting, just tap on the event. You can review the full list of invitees and any notes from the original invitation. Today matches Salesforce records with information from your event, so you can easily access customer details.

Today also provides actions that cut down on the amount of time spent switching between different apps, like placing phone calls directly from Salesforce1 or adding new Salesforce contacts from a list of meeting invitees.



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


## Set Up Today

It only takes a few minutes to set up Today in Salesforce1.


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

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

1. From the navigation  menu, tap **Today**.
2. Tap **Get Started**.
3. *iOS devices only:* Tap **OK** to grant Salesforce1 access to your calendar access.  
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 want to change the calendars Today has access to, use the  icon at the bottom of the main Today page to update your settings.

 **Tip:** Today collects events from the mobile calendars you selected during setup. 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 Salesforce1 access to your calendar or if you 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**.

## Searching in Salesforce1

It's easy to find what you need in Salesforce1. Learn how to use your recently accessed objects and search your dashboards, records, and Chatter feed.

### Search with Salesforce1

Searching in Salesforce1 is easy—from anywhere in the app, you can search keywords or phrases to find whatever you're looking for. You can even use your mobile device's built-in Spotlight Search to find Salesforce1 data.

Here are a few search tips to get you started:

- If you get too many results, enter a more specific search term. For example, enter the full name and company ("Mike Jones Salesforce") or last name and zip code ("Jones 94123"). The more specific you are, the better your results will be.
- Don't use partial terms, like "Ac" for "Acme Bread Company."

- If you think that a record isn't appearing due to permission issues, check with your admin! Salesforce1 only shows you records that you have access to.

Keep in mind a few key differences between searching in Salesforce1 compared to the full Salesforce site:



- You can't refine search results in Salesforce1.
- Salesforce1 Global Search does not include results from your Chatter feed.

Want to learn more about search? See the following links for more tips and tricks.

## Search Salesforce1

There are a few different ways of searching the Salesforce1 mobile app, but all of them can help you easily find the information you need.

There are three ways to search in Salesforce1:

- **Record search:** find an item by the type of object, such as a specific contact or lead, then tap the object in the navigation menu to open its 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**.
-  **Note:** When you use global search in Salesforce1, you can only find records for the objects in your Recent section. To find records for objects that are not in your Recent section, search from the object's home page.
- **Global search:** If you're unsure about what kind of object a record is—such as a person who could be either a contact or lead—you can search using keywords to find the object.
  - 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.
- **Chatter feed search:** Search for posts, comments, hashtag topics, mentions, and files using the search box in the main feed.

## Spotlight Search

Use your iPhone's Spotlight Search feature to find Salesforce1 records without even opening your app.

You can use Spotlight Search to find and access your Salesforce1 records.

Search using keywords like account name, job title, or company name to find the records you need.

Here are some considerations to keep in mind:

- If your org disabled offline caching or requires you to enter a PIN to log in to Salesforce1, the Spotlight Search feature is disabled.
- Only your 200 most recently viewed Chatter profiles and your 200 most recently accessed contacts are indexed in Spotlight Search.
- This feature is only available on the iOS app, version 11.0 or later.
- Visualforce and Lightning page tabs are unavailable in Spotlight Search.
- If you have multiple accounts on Salesforce1, your search results are for the account you're currently using.




## Find Recently Accessed Objects

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

When you're new to Salesforce, you initially see a set of default objects in the Recent section in the Salesforce1 navigation menu. As you spend time working in Salesforce, the objects that you use the most will appear in the Recent section instead, replacing the default objects. They become the objects that are available for global search.

To open an object listed in the Recent section, simply tap it.

 **Note:** 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.

## Accessibility

The Salesforce1 mobile app is fully accessible for users working with screen readers and other accessibility features. If you use accessibility features on your mobile device, you're all set—these features are already enabled on Salesforce1.

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. That said, there are a few limitations.

If you use assistive technology on an iOS device, be aware that:

- 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.

If you use assistive technology on an Android device, be aware that:

- 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.

## Interact with Your Coworkers and Clients

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With Salesforce1, you have the ability to place calls and send emails through the app, as well as stay up to date with your Chatter feed.

### Chatter

If your org uses Chatter, you can view and interact with others on your feed using the Salesforce1 mobile app.

As long as you can use Chatter on the full Salesforce site, it's also available to you on Salesforce1. Just like on the full site, you can post to your feed, comment on your coworkers' posts, vote on polls, and more. Check out the topics below for more information on a few key features.

 **Note:** If you don't have access to Chatter, contact your Salesforce admin.

### Mention People and Groups

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 best matches, then tap the person's or group's name in the list. To see more matches, scroll through the list.

## 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.

To see all the posts you've bookmarked, tap ▼, then tap **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**.

## 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 **Chatter** to see everything you follow.
  - 📌 **Note:** If you don't see **Chatter** 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.

## What to Expect if Your Org Doesn't Use Chatter

Salesforce1 is available without the collaboration tool Chatter.

If your Salesforce admin has turned off Chatter, Chatter features like feeds and posts won't be available and you won't see the **Chatter**, **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.

## Social Media


You can connect Salesforce1 to your Twitter account to stay social and expand your network.

When you connect Salesforce1 to your Twitter account, you can view up to five common connections you share with your accounts, contacts, or leads.

To view a Twitter profile, tap the Twitter user icon.

## Edit a Twitter Profile Association


If your org uses Social Accounts and Contacts, you can associate your accounts, contacts, and leads with Twitter profiles.


 **Note:** To set up or edit associations with Twitter user profiles, you need to be logged in to a Twitter account and have “Edit” permission for accounts, contacts, and leads.


If you don't see Twitter cards on your account, contact, or lead related information pages, ask your Salesforce admin to set up Twitter for Salesforce1.

To associate a Twitter profile with an account, contact, or lead:

1. From the related information page in a record view, tap **Link Twitter Account**.
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 via the search box at the top of the page and try again.
3. Tap the appropriate Twitter profile to associate it with your account, contact, or lead.



 **Note:** You can associate up to 15 Twitter profiles in a 15 minute period. Associating a Twitter profile doesn't make you follow the user on Twitter. Changes made to associations with Twitter are shared between the full Salesforce site and Salesforce1.

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

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

## Access Your Communities

You can use Salesforce1 to switch between your internal org and any Salesforce Community that you're a member of.

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

When you are a member of multiple communities:


- The communities you see in the account switcher are based on the account that you're currently using. If you switch to a different account, the list of available communities may change.
- When you refresh Salesforce1, you will only see new content from the community you are currently using.
- When you use global search, you are only able to search the community you are currently using. To reflect this, the text in the search box shows: **Search** *<Community Name>*.
- You see notifications from every community you're a member of. To help identify which community a notification comes from, the community's name is listed after the time stamp.

## Stay In Touch

With Salesforce1, you can stay in touch remotely by placing calls and sending emails directly from the app.

## Send Email

Send emails to your contacts, leads, and coworkers.

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 one.

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

## Send "Running Late" Email Messages


Quickly send an email to let coworkers or clients know that you're going to be delayed or miss the meeting altogether. Today includes several pre-written 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.

## Make a Phone Call


Call a contact, account, lead, or colleague directly from Salesforce1.


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

 **Note:** If you don't see this option, 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.

## Log a Previous Call

When you make a phone call 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, or

- **Log Without Calling** to enter notes about a call made at a different time.

3. Complete the Log a Call form and tap **Save**.



**Note:** If you log a call you made outside Salesforce1, the date and time reflect when you created the log, not the date and time you actually made the call.

## Dial In to a Conference Call

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.

## Increase Your Productivity

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Many of Salesforce1's features—like creating events and tasks, submitting records for approval, and taking notes—are designed to help you stay organized.


### Stick to Your Schedule

Create events, prepare for meetings, and edit tasks on the go with Salesforce1.

#### Create Events


You can create an event directly from your event list on Salesforce1, or on a record page such as a lead or contact.

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

1. Tap  in the action bar.
2. Enter the details of your event and tap **Save**.

 **Note:** If you don't see the  for some or all of your objects, contact your Salesforce admin—they may have disabled this setting.








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

1. Tap  in the action bar.
2. From the pop-up menu, choose which record type you want to create.
3. Enter the details of your event and tap **Submit**.

## Prepare for a Meeting

Easily check for last minute meeting updates or refresh your memory about important details with Today. 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.
-  **Note:** If you see the  avatar without a job title, it 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.

## View Tasks

View tasks when and where you need to see them—in the context of all your tasks or 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 you create a task in relation to a record, a post about the task will be displayed in the record's feed.
2. Tap a task to see the task record.


 **Note:** If you don't have access to feeds or your record feed doesn't display tasks, contact your Salesforce admin.

## Edit Task Details

If you have the "Edit Tasks" user permission, you can update task details in Salesforce1.

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**.

 **Note:** If you don't have the "Edit Tasks" user permission, contact your Salesforce Admin.


## Do Your Work On the Go

With Salesforce1, you don't need to wait until you're back at your computer to complete important projects and duties, like closing deals.

### Convert Leads to Contacts

Grow your revenue pipeline on the go by converting leads to contacts and creating new accounts and opportunities.

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

 **Note:** If you don't see this option, ask your Salesforce admin to enable it.

#### Create Accounts and Opportunities

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

#### Choose Lead Sources

You can choose to keep the existing contact's lead source or replace the lead source with one from a converted lead.

#### Prevent Duplicates

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

## Increase Close Rates with the Sales Path

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 you close the sale.

 **Note:** If you don't see Sales Path when viewing opportunities, ask your Salesforce admin 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**.

## Approve Records

Get records approved on the go with Salesforce1.

You can submit records for approval via the record's action bar when:

- You are using the Salesforce1 downloadable app for iOS or Android.

- There is an active Approval Process
- Your page layout includes the Submit for Approval button.

Keep in mind that you can't manually select an approver in Salesforce1, only in the full Salesforce1 site.

To submit a record for approval, simply tap **Submit for Approval** in the record's action bar.

If you are an approver, you can receive approval requests as notifications in Salesforce1. To approve a record using Salesforce1:

1. Tap on the approval request in your notification list.
2. Tap either the red **Reject** icon or the green **Approve** icon.
3. If you'd like to, leave comments. You can leave comments whether you reject or approve the request.
4. Finalize your decision by tapping **Reject** or **Approve**, as applicable, in the top right corner.

## Stay Organized

Whether you want to create a folder for your files or take notes, Salesforce1 has you covered.

### Add a Folder

Folders are available if Salesforce Files Sync is enabled for your organization, you can create folders to store and organize your files. 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**.

### Take Notes

Keep track of important information using enhanced Notes. 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.

- If you want to relate a note to other records, tap **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.  
To view related tasks and mark tasks as complete, tap . You can also work with these tasks from your task list.
- Use the formatting bar to add bulleted and numbered lists to notes.



- You can add images to notes using the formatting bar. 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 versions of Salesforce1.

## Access Your Information On the Go

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View your dashboards and reports, edit records, and access your files on the go. You can even use some Salesforce1 features offline.


### Dashboards and Reports

With Salesforce1, you can use your dashboards to navigate to reports.

#### View Your Dashboards

As long as your Salesforce admin has enabled them, your dashboards in Salesforce1 match your dashboards in the full Salesforce site.


To view your dashboards in Salesforce1:

1. Tap  to open the navigation menu.
2. Tap **Dashboards**.
3. Choose from the list of recently viewed dashboards or search for a dashboard that isn't listed.
4. If you're working on a smartphone or using the Android downloadable app, navigate through the dashboard by swiping through the columns or tapping the page indicator. 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.

Critical information, such as the running user or the last refresh date, is displayed at the top of the dashboard view.

#### View Your Reports

You can view your recently viewed reports from the Salesforce1 navigation menu. Navigate to your other reports from dashboards.

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


All reports are displayed in tables. If you group a report, the grouping criteria are added to the end of the report as columns. 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.

#### Use Dashboards to View Your Reports

When viewing a dashboard, you can tap its components to see reports.

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

 **Tip:** Refresh your dashboard to see the most up-to-date information.

Some tips when working with reports in Salesforce1:

### 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.

### Abbreviated Text in Report Columns


To fit multiple columns on a small mobile screen, the contents of a field may be abbreviated. Tap the field to see the full text.

### Sort Reports

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

## 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 via 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.

For more information on using your records on Salesforce1, check out these topics:

## Add New Records

As long as you have the "Create" user permission for an object, you can create records for it.

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 .
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 downloadable app. You'll need to use the full Salesforce1 site to populate these types of fields.

4. Tap **Save**.

## Update Data in Your Records

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

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

 **Note:** As with the full site, you need the "Edit" user permission on each object for which you want to edit records.

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

## Work With Files

Learn how to find and share your files—plus take or upload photos—using Salesforce1.

### Upload a Photo

Easily upload photos from your device to Salesforce Files, where 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 a file by its name. 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.

## Work Offline with Salesforce1

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 or higher of Salesforce1 for Android or iOS.

### Work with Records While Offline


When the Salesforce1 Offline Edit beta feature is enabled for your org, you can keep working with your records when your mobile device doesn't have cellular connectivity. You can do these actions for any object or record currently stored in your cache.

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

When offline, you can:


- Create a record using the **New** button on an object home page. (To create a new task, use the **New** button on the My Tasks list.)
- 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 is still being tested, there are some limitations when creating, editing, or deleting records while offline.


- All actions other than **Edit** and **Delete** are unavailable.
- 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.

 **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](#).


### Resolve Conflicts for Offline Changes

When you're back online, Salesforce1 automatically syncs all your pending edits, including 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.

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 Salesforce admin for help resolving the problem that blocked Salesforce1 from syncing your changes.

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