Salesforce Mobile Classic for BlackBerry

Using Salesforce Mobile Classic, you can work on your accounts, contacts, opportunities, products, leads, cases, solutions, activities, and custom objects anytime, no matter where you are. Note that the Salesforce Mobile Classic for BlackBerry app is no longer supported.

What is Salesforce Mobile Classic?

(!) Important: As of Summer '14, the Salesforce Mobile Classic for BlackBerry app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce app, the new Salesforce mobile experience.

Salesforce Mobile Classic is a powerful wireless tool that helps mobile teams stay connected to the latest data, whenever and wherever they need it, right from their BlackBerry®. With Salesforce Mobile Classic, field professionals are prompted to log information directly in Salesforce immediately after important customer calls, emails, and appointments, so critical information is captured in near real time.

BlackBerry Requirements

- Salesforce Mobile Classic works on a wide range of popular BlackBerry smartphones. Review the supported devices list to find out if you can use the mobile application on your BlackBerry.

- The Salesforce Mobile Classic app can run on BlackBerry operating system versions 4.3 through 7.0.

- The BlackBerry firewall must be active. Confirm the firewall status by clicking **Options** > **Security Options** > **Firewall**. If the status is Disabled, change it to Enabled.

Getting Started with Salesforce Mobile Classic

Additional Resources

For detailed instructions about using Salesforce Mobile Classic, read the *Salesforce Mobile Classic User Guide for BlackBerry*.

To install Salesforce Mobile Classic:

1. Find the email from your Salesforce administrator with a link to install the application.

2. Click the link in the email on your device to launch your browser. You can also open the mobile browser and navigate to `http://mobile.salesforce.com/setup`.

3. Click the **Click here to download the client** link, then click **Download**.

4. Click **Reboot** to restart your device.

5. When prompted to allow an HTTP connection, select the `tp.mobile.salesforce.com` checkbox. Scroll down and click **Allow this connection**.

6. After the installation is complete, open Salesforce Mobile Classic and accept the license agreement.

7. Enter your Salesforce username and password, and then click **Activate**. The initial data download may last a few minutes. Future updates to the data occur automatically in the background when you are in wireless coverage.

8. Depending on your organization's setup, you might need to create a passcode before accessing the application.

What Data is on My Device?

Synchronizing Data

Typically, data synchronization between your device and Salesforce occurs every twenty minutes. To force your data to synchronize, select **System Info** from the menu, then select **Refresh All Data** from the menu.

Running Salesforce on a BlackBerry smartphone is much different than using the application on your computer. Wireless devices have a minimal amount of memory, a small screen, and do not maintain a constant network connection. To work with these limitations, a subset of your Salesforce data is stored in a local database on your phone. This ensures you have access to your most important records and lets you work offline when no network connection is available. Your Salesforce administrator defines which tabs, objects, and records are available to you in Salesforce Mobile Classic.

Navigating in Salesforce Mobile Classic

Here are some guidelines for getting around in the mobile application:

- Salesforce Mobile Classic displays your Salesforce tabs in a horizontal row across the screen.
- Salesforce Mobile Classic opens to the Home tab, which contains a list of items you recently accessed in the mobile application. A Recent Items view is also available for each object. Depending on your mobile configuration, the recent items list might display records you recently accessed on the Salesforce website.
- Roll the trackwheel or trackball to move the cursor and highlight items on the screen.
- With a trackwheel device, click the trackwheel to select an item or open the application's menu. With a trackball device, click the trackball to select an item, and press the Menu key to open the application's menu.
- Like other BlackBerry applications, Salesforce Mobile Classic has a main menu. The options on the menu are context-sensitive, which means that the options change depending on the type of item you select before opening the menu.
- Press the Escape button or Escape key to exit a screen, cancel an action, or go back one page.

Searching for Records

Search Results

On the Home tab, the search results for each object display in collapsible sections. On other tabs, the search results display in a list. You can access the last set of search results on a tab by selecting Search Results from the Views menu.

The easiest way to search for information is to use the Search box located on any tab. The application looks for records stored locally on the device and for records online in Salesforce.

1. Type keywords in the Search box at the top of the page. To search across all objects, use the Search box on the Home tab. To find records of a particular object, use the Search box on the relevant tab. For example, search for leads from the Leads tab.

2. Click the Search icon or press ENTER. Click the Cancel icon to stop the search.

3. To obtain more information about an item in the search results, highlight the record to populate the detail pane at the bottom of the page.

4. To open an item in the search results, click the record, or highlight it and select **Open** from the menu. If the record is online instead of local, it is automatically downloaded to your device when you open it.

Working with Records

Open an Object's List View

- To see a list of local records for an object, click the object's tab. You can also highlight a tab and select **Open** from the menu.
- In any list view, you can filter the list by typing a text string. To turn off a filter, press BACKSPACE to delete the text or press Escape.

View a Record

- Click the record in the list view, or highlight the record and select **Open** from the menu.

Edit a Record

- Open the record, then select **Edit** from the main menu. Make changes to the record, and then select **Save** from the menu.

Create a Record

- Select a tab, then select **New** from the menu. Enter information, then select **Save** from the menu.
- When you create a new record in Salesforce Mobile Classic, it is saved on the device and sent to the server. The record cannot be edited until it has been accepted by Salesforce.

Delete a Record

- Open the record, then select **Delete** from the menu. Click **Yes** in the confirmation window. Deleting a record in Salesforce Mobile Classic also deletes the record from Salesforce.

Related Records

You can access items related to the current record. For example, from an account, you can view contacts associated with the account. Open a record, then open the menu and select the related list. If you do not see the record you need in the related list, you can search for more related items using the **Get More** menu option.

Map an Address

To map an address, open a contact, lead, or account, then select **Map Address** from the menu. The browser launches Google Maps and displays the address.

Working with Activities

Activities are both tasks and scheduled calendar events. In Salesforce Mobile Classic, there is not enough space on the home page to display your tasks and events; instead, you access your activities using the Tasks and Events tabs.

To view your events:

- Click the Events tab, or highlight the Events tab and select **Open** from the menu.
- You can view the events in a list, or you can view them in a daily, weekly, or monthly calendar. Use the icons along the top of the page to toggle the view.

To view your tasks:

- Click the Tasks tab, or highlight the Tasks tab and select **Open** from the menu.

The activities available in the mobile application—whether open or history—are determined by the mobile configuration set up by your administrator. Keep in mind that you can perform a search to retrieve any open activities or activity history not currently available in the mobile application.

Activity Alerts

Salesforce Mobile Classic can remind you about upcoming activities. The alert can appear in a popup window or trigger your device to vibrate or play a tune.

To enable task and event alerts, select **Preferences** from the menu. For Tasks and Events, set the `Enable Alerts` option to Yes, then adjust the other notification settings, if desired.

Placing and Logging Calls

Call Logging Preferences

Logging options in Salesforce Mobile Classic control how you are prompted to log information in Salesforce after making a call from a record. The options are available in Contact, Account, and Lead preferences. To change the way you're prompted to log calls, open the object preferences and set the `Log After Call` option to Yes.

One of the benefits of using Salesforce Mobile Classic is that the mobile solution integrates with the native phone application on your device. You can quickly look up a contact or lead in Salesforce Mobile Classic and then place a phone call directly from the record. You're prompted to log the phone call to Salesforce upon ending the call.

1. Highlight or open a record that contains a phone number field, then select **Place a Call** from the menu.

2. Highlight the phone number you want to dial, then open the menu and click **Select**. The BlackBerry opens the phone application and dials the number. Upon ending the call, you are prompted to log it.

3. Click **Yes** to log the call. Logging a call launches a new task or event.

4. Enter information about the call.

5. Select **Save** from the menu. Salesforce Mobile Classic sends the information about the logged call to Salesforce. You can see the task by viewing the activity history associated with the record.

Sending and Logging Emails

Email Logging Preferences

Logging options control how you are prompted to log completed tasks in Salesforce after sending an email from a record. The options are available in Contact and Lead preferences. To change the way you're prompted to log emails, open the object preferences and set the `Log After Email` option to Yes.

Salesforce Mobile Classic seamlessly integrates with the email application on your device. BlackBerry users can capture inbound communication from customers, messages sent from the email application, and email sent from Salesforce Mobile Classic.

- To send and log an email from Salesforce Mobile Classic:

  1. Open a contact or lead record, and then select **Send Email** from the menu.

  2. Compose your message, and then select **Send** from the menu. A popup window prompts you to log the email.

  3. Click **Yes** to log the email. Logging an email launches a new task or event.

  4. The `Subject` field defaults to the subject line of the email, and the body of the message is stored in the `Comments` field.

  5. Enter additional information about the email, then select **Save** from the menu.

- To log a message from the BlackBerry email application:

  1. On the BlackBerry home screen, scroll to and click the Messages icon.

  2. Highlight an email in the list of messages, then select **Log Email to Salesforce** from the menu.

  3. The message subject and body are imported from the BlackBerry email application.

  4. Enter additional information about the email, then select **Save**.