



Salesforce App Admin Guide

Version 13, Summer '19

Get your organization ready for the Salesforce mobile experience! Learn how to optimize your page layouts for mobile, customize the navigation menu, create actions, work with compact layouts, set up mobile navigation, and much more.

Salesforce App Admin Guide

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CHAPTER 1 Introduction

In this chapter ...

- [Introducing the Salesforce Apps](#)
- [Getting Around in the Salesforce App](#)
- [What about the Other Mobile Apps?](#)

The Salesforce app enables you to experience all of the Salesforce Platform from any mobile device. The app brings together Chatter, CRM, and business logic so you can connect to all of your data.

With the Salesforce app, your users can access custom objects and custom apps through the navigation menu and take advantage of custom actions to complete key tasks all from their mobile devices. Your users can also access their custom list views, receive notifications for posts and approvals that need their attention, get an immediate view of their day in the new "Today" app, or choose from a variety of mobile-optimized AppExchange apps to install.

The app is fully customizable, allowing you to extend your custom apps to mobile using tools that you're already familiar with.

This guide walks you through the process of getting your company ready for mobile, from configuring your organization's settings to rolling out the app and customizing it with your own branding. You'll learn how to quickly configure the items that appear in the navigation menu using the Salesforce Mobile Wizard. You'll also learn how to optimize page layouts, work with compact layouts, set up mobile notifications, and customize actions so your users can get important work done quickly from their mobile devices.

The Salesforce App Admin Guide is an essential resource for Salesforce administrators who want to roll out enterprise mobile to their organizations. This guide introduces you to all of the declarative (point-and-click) tools needed to create a personalized mobile experience.

If, after reading this book, you want to venture into the world of developing for the app, take a look at the [Salesforce App Developer Guide](#). Using a Developer Edition organization and a set of sample data and exercises, you can create custom actions, work with Visualforce pages, and learn about canvas apps and mobile UI design.

Introducing the Salesforce Apps

The Salesforce apps are Salesforce on the go! These enterprise-class mobile apps give your users real-time access to the same information that they see in the office, but organized for getting work done in those precious free moments when they're between customer meetings, waiting for a flight—even when they're in line for coffee.

You can get Salesforce in different ways:

- As an app for iOS from the App Store or an app for Android from Google Play.
- As mobile web experience that runs in supported mobile browsers. This option doesn't require anything to be installed.

Supported Devices

The way users access Salesforce depends on whether they are using Salesforce for iOS, Salesforce for Android, or Salesforce on the mobile web.

Operating System and Version Requirements	Mobile Browser Requirements [*]
Android 5.0 or later	Google Chrome on Android
iOS 10.3 or later	Apple Safari on iOS

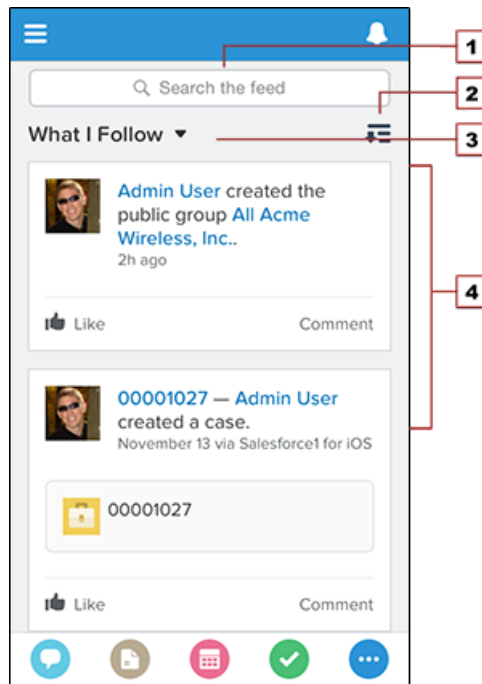
Getting Around in the Salesforce App

Let's take a tour of the Salesforce app.

When users log in to Salesforce, the first thing they see is a landing page. The first item in the navigation menu becomes a users' landing page by default. If your organization has Chatter enabled, and you haven't customized the navigation menu to change the first item in the menu to something else, the user's Feed will be their landing page.

The Feed

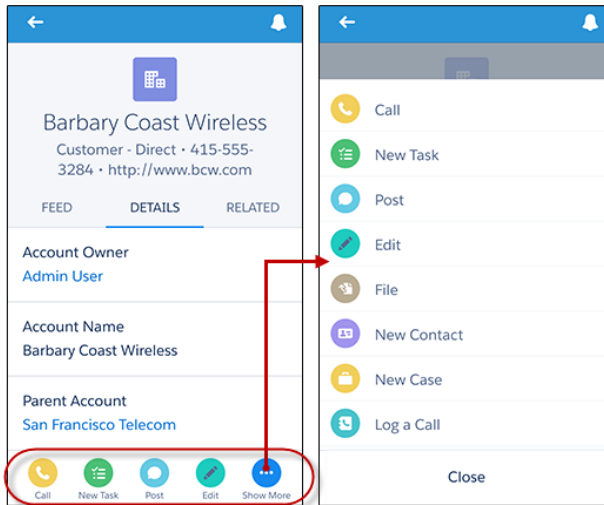
The Chatter feed shows users their updates, updates to records and people they follow, and updates in groups they follow. Tapping a feed item displays all of the item's details. Pulling down on the feed reveals the search bar (1), sort and filter options (2), the feeds drop-down menu (3), and feed items (4).



From the feed, record pages, and from elsewhere in Salesforce, users access actions from the action bar.

The Action Bar and Menu

Depending on which feed or record page users are viewing, they see different actions in the action bar and action menu. From the feed, for example, they see a set of global actions. From a record page, however, they see a mix of productivity actions, standard and custom buttons, standard Chatter actions such as Post and File, and global and object-specific actions that are assigned to the layout for that record type. Users can tap  from the action bar to open the action menu, which contains the full set of actions that are available for the object.

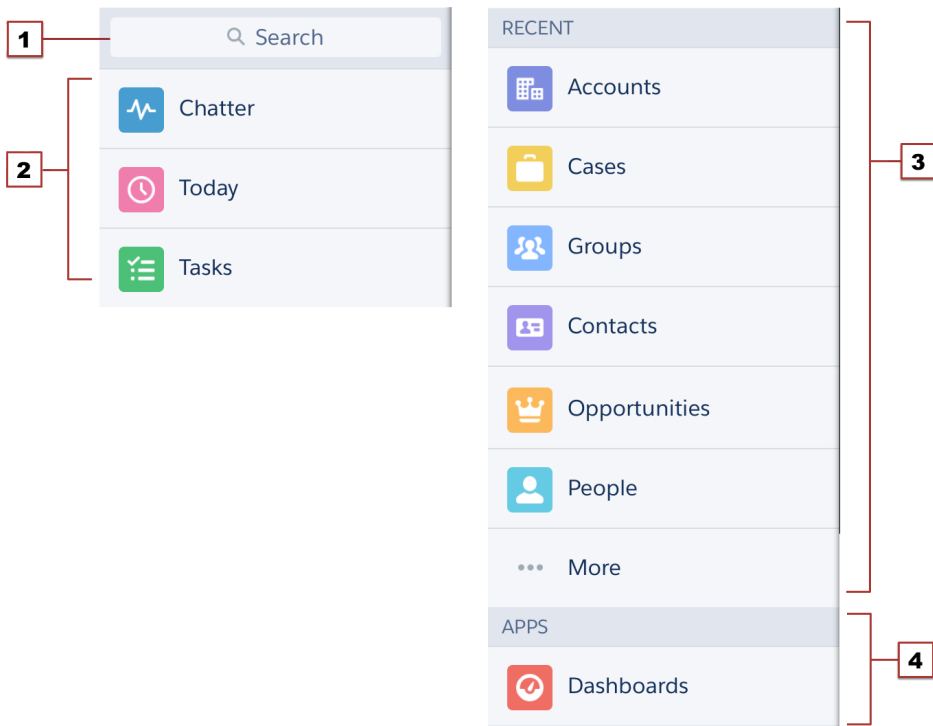


 **Note:** You can find out more about the action bar in the appendix [How Predefined Actions Are Ordered in the Salesforce Mobile App Action Bar and List Item Actions](#) or in the Salesforce Help.

Salesforce App Navigation Menu

Anywhere users see , they can tap it to access the navigation menu. If a user doesn't see , they can swipe left to right on the header bar to open the navigation menu.

What your users see in the menu is determined by how you, as the administrator, have configured it, what's available in your organization, and what users have access to, based on their user permissions and profile.



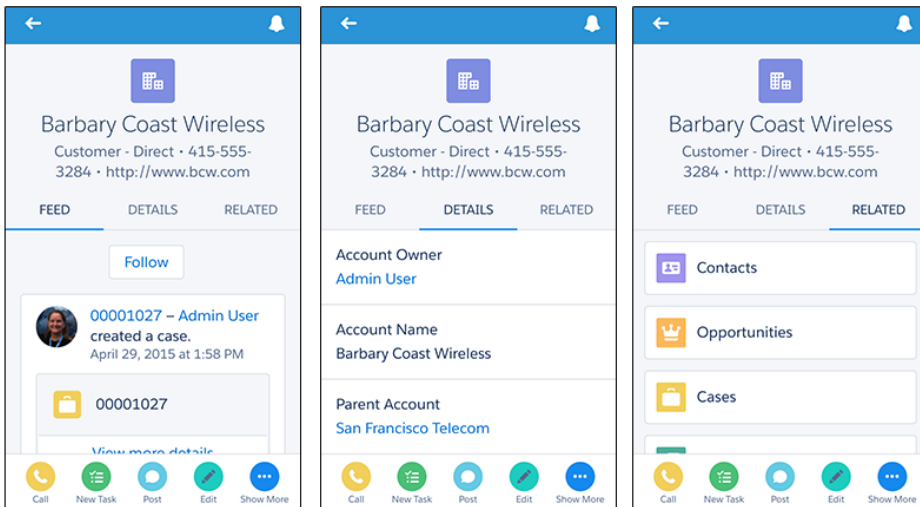
1. Search box
2. Menu items—any items you place above the Smart Search Items element when you customize the navigation menu
3. Smart Search Items—includes a set of recently-searched objects in the Recent section and a larger set of supported objects under the More link
4. Apps section—contains any items you place below the Smart Search Items element

From the navigation menu, users can access the feed, objects, apps, tasks, notes, and any other item you've added to the menu.

The Record View

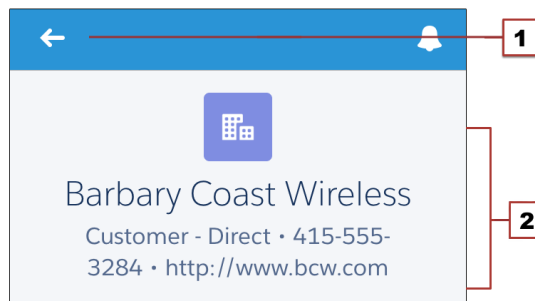
The record view is made up of the record feed, detail, and related information pages, which your users can swipe left and right to see. If your organization doesn't have Chatter enabled, the record view only includes the detail and related information pages.

Chapter 1 Introduction



At the top of each record page is the record highlights area. The icon for standard objects is predefined in Salesforce, and you can select the icon for a custom object using the custom object's tab style.

You can customize the fields displayed in the record highlights by using compact layouts.



1. Back arrow—returns the user to the previous page
2. Record highlights—displays the first four fields that are assigned to the compact layout for the object

What else do I need to know?

From the top of most pages, users can access their notifications by tapping .

Users can create a new record by tapping **New** at the top of recent object pages, search pages, and related list pages. They can also create and update records by using actions in the action bar.

What about the Other Mobile Apps?

Wondering how the Salesforce app relates to the other Salesforce mobile products?

- SalesforceA gives administrators mobile access to essential organization management tasks. Use it to edit, unlock, freeze, and deactivate user accounts, reset passwords, and assign permission sets.

For more detailed information about the full suite of Salesforce mobile apps, see “Salesforce Mobile Product Comparison” in the Salesforce Help.

CHAPTER 2 Get Your Organization Ready for Mobile: The Big Picture

The Salesforce App works for your users out of the box. If you do nothing to your organization, your users can still access its information and work in the app. However, as an administrator, you can significantly improve your mobile users' experience with Salesforce1 by taking the time to configure a few organization settings and customize how the data in your organization is displayed in a mobile environment.

In this book, we'll discuss how and where to do all of these.

- Define the users who can access the Salesforce app.
- Help keep Salesforce app users aware of important Salesforce activities by enabling in-app and push notifications.
- Allow Salesforce for Android and Salesforce for iOS to automatically cache frequently accessed Salesforce data to secure, persistent storage, so users can view data when their devices are offline. (This option is turned on by default.)
- Customize the options that are available in the Salesforce app navigation menu, and the order in which items appear.
- Customize how data appears in the Salesforce app.
- Make it easy and efficient to work in the field by creating actions that are tailored to your specific business activities and use cases.
- Customize the Salesforce app to match the look and feel of your company's branding.

All Salesforce app customization options are available from the Setup menu. For your convenience, you can access many settings pages more quickly from the Salesforce Mobile Quick Start setup page. In Salesforce Classic, from Setup, click **Salesforce Mobile Quick Start** (near the top of the Setup menu). In Lightning Experience, from Setup, enter *Salesforce Mobile Quick Start* in the Quick Find box, then select **Salesforce Mobile Quick Start**.

CHAPTER 3

Configure Your Organization for the Salesforce App

In this chapter ...

- [Unlock Salesforce with the Salesforce Mobile Wizard](#)
- [Define Which Users Can Use the Salesforce App](#)
- [Enable or Disable Notifications](#)
- [Customize the Navigation Menu](#)

Make it easier for your mobile users to get work done in Salesforce by configuring a few settings in your organization. It doesn't take long, and your users will thank you for it!

With a few clicks, you can define which of your users can use the Salesforce app, enable or disable key features for your organization—such as in-app and push notifications—and customize the navigation menu. In this chapter, we'll go over all of these.

Unlock Salesforce with the Salesforce Mobile Wizard

The Salesforce Mobile Wizard provides an easy way to complete the essential setup tasks.

The wizard is the ideal tool to quickly get your users started in the Salesforce app. It provides a visual tour of key point-and-click settings, which enables you to configure these options that apply to all users in your organization.

- Specify which items appear in the navigation menu
- Organize global actions
- Create a custom compact layout for contacts

The Salesforce Mobile Wizard gets you started with the basic setup tasks for the Salesforce app, but there is a lot more customization you can do to further enhance your users' mobile experience.

If you're new to Salesforce, or if you haven't done much customization or configuration for the Salesforce app in your organization, we recommend that you step through the wizard. From Setup, enter *Salesforce Mobile* in the **Quick Find** box, select **Salesforce Mobile Quick Start**, and then click **Launch Quick Start Wizard**.



Note: We recommend using Google Chrome for the Salesforce Mobile Wizard and the Salesforce Setup page. Microsoft Internet Explorer 9 or later and Mozilla Firefox are also supported.

After you've finished the wizard, you'll be directed to the Salesforce Mobile Quick Start setup page, which provides easy access to setup pages and documentation. For settings that are configured on a single page, the Quick Start page includes direct links to those pages. In cases where the settings are available on multiple pages in Setup, we've provided links to relevant documentation about the setting.

Define Which Users Can Use the Salesforce App

Regardless of whether your users prefer to use Salesforce for iOS, Salesforce for Android, or Salesforce for mobile web, with a few clicks you can control who has mobile access and configure security settings.

Downloadable Apps

Salesforce for Android and Salesforce for iOS are connected apps. As a result, you can control the users who have access to the apps, as well as other security policies. By default, all users in your organization can log in to Salesforce for Android and Salesforce for iOS.

You can control security and access policies for Salesforce for Android and Salesforce for iOS using settings components that are installed from the managed Salesforce connected apps package. These components need to be installed in Salesforce:

- Salesforce for Android
- Salesforce for iOS

These components are automatically installed when one of your users installs Salesforce from the App Store or Google Play on a mobile device and authenticates with your organization by logging in to the mobile app.

Alternatively, you can manually install the [Salesforce and Chatter Apps connected apps package](#) so you can review and modify the default security and access settings before rolling out Salesforce for Android and Salesforce for iOS to your users.

When the Salesforce connected apps components are installed, they're added to the Connected Apps page. (From Setup, enter *Connected Apps* in the *Quick Find* box, then select the option for managing connected apps.) Here, you can view and edit the settings for each of the apps, including controlling user access with profiles, permissions, and IP range restrictions. An error message is displayed if a restricted user attempts to log in to Salesforce for Android or Salesforce for iOS.

Salesforce Mobile Web

You can control whether users can access Salesforce mobile web when they log in to Salesforce from a supported mobile browser. By default, mobile web is turned on for your organization.

1. From Setup, enter *Settings* in the *Quick Find* box, then select Salesforce Settings.
2. Select *Enable the Salesforce mobile web* to allow all users in your organization to access the app. Deselect this option to turn off access to the app.
3. Click **Save**.

When this option is turned on, users who log in to Salesforce from a supported mobile browser are automatically directed to the Salesforce mobile web experience. Logging in from an unsupported mobile browser loads the Salesforce Classic full site, even when this option is selected.

 **Important:** Use of the Salesforce Classic full site in a mobile browser isn't supported. While you can disable Salesforce mobile web for your organization, and individual users can turn off mobile web for themselves, regular use of the full site in a mobile browser isn't recommended. Your users may experience problems that Salesforce Customer Support won't investigate.

It's not possible to access the Lightning Experience full site from any mobile browser.

Enable or Disable Notifications

Notifications let your users know when certain events occur in Salesforce. For example, notifications let users know when they receive approval requests or when someone mentions them in Chatter.

You can enable or disable notifications on the Salesforce App Notifications page in Setup. Notifications are enabled by default.

These types of notifications can appear to Salesforce app users.

In-app notifications

In-app notifications keep users aware of relevant activity while they're using the Salesforce app. By tapping , a user can view the 20 most recent notifications received within the last 90 days.

If Salesforce Communities is enabled for your organization, users see notifications from all of the communities they're members of. To help users easily identify which community a notification came from, the community name is listed after the time stamp.



Note: Enabling in-app notifications is an all-or-nothing process. Either they're on for everyone, or off for everyone. Mobile users can't customize, enable, or disable in-app notifications for themselves.

Push notifications

Push notifications are alerts that appear on a mobile device when a user has installed Salesforce for Android or iOS but isn't using it. These alerts can consist of text, icons, and sounds, depending on the device type. If an administrator enables push notifications for your organization, users can choose individually whether to receive push notifications on their devices.

Approval Request Notifications in the Salesforce App

Users can receive approval requests as notifications in the Salesforce app and can access them by tapping  or from the Approval Requests item in the navigation menu.

However, some caveats apply to how approval notifications work in the Salesforce app.

- If you enable notifications in the Salesforce app, keep in mind that approvers may view this list of fields on a mobile device. Select only the fields necessary for users to decide whether to approve or reject records.
- Salesforce app notifications for approval requests aren't sent to queues.

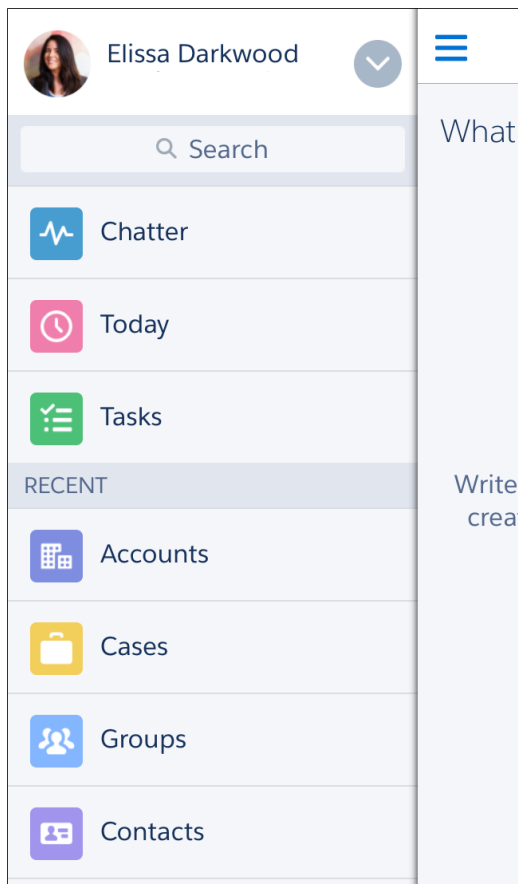
For each approval step involving a queue, we recommend adding individual users as assigned approvers, so at least those individuals can receive the approval request notifications in the Salesforce app. To have both queues and individual users as assigned approvers, select `Automatically assign to approver(s)` instead of `Automatically assign to queue` in the approval step.

- Unlike notifications for approval requests in email, notifications for approval requests in the Salesforce app are sent only to users who have access to the record being approved. Assigned approvers who don't have record access can still receive email approval notifications, but they can't complete the approval request until someone grants them record access.
- Individual users can opt in or out of approval request notifications in both email and Salesforce1 via the `Receive Approval Request Emails` user field.

Customize the Navigation Menu

Before you can send your users out on their mobile adventure, they need a map to point the way to their destination. The Salesforce app navigation menu is that map. And it's up to you to draw it for them. Help your mobile users get work done faster and more easily by configuring which items appear in the navigation menu and in which order.

The  icon in the header opens the navigation menu.



As an administrator, you can customize what the menu contains in Setup by entering *Navigation menu* in the **Quick Find** box, then selecting **Navigation menu**.

What You Can Include

Depending on how your organization is configured and what your users have access to, they might see some or all of these items in their navigation menu.

Menu Item	Description
Approval Requests	Displays a list of the user's pending approvals. Users can tap an approval item and approve or reject it from within Salesforce. Available in Salesforce for iOS and mobile web.
Canvas apps	Appears for organizations that have enabled a canvas app to appear in the navigation menu.
Chatter	The user's main feed. Appears for organizations that have Chatter enabled.
Dashboards	Availability depends on edition and user permissions. If you don't add this item to the navigation menu, dashboards are automatically included in the set of Smart Search Items instead and the Dashboards item is available from the Recent section.
Events	Lists events owned by the user, that the user created for him- or herself, and that the user or a user's groups are invited to. If you don't add this item to the navigation menu, events are automatically included in the set of Smart Search Items instead and the Events item is available from the Recent section.
Forecasts	Displays the Forecasts app, a helpful tool for every member of a sales team to keep track of forecast data and monitor progress towards quota. Available in the Salesforce for iOS only.  Note: Your org must have Collaborative Forecasts enabled. If your org uses Customizable Forecasts, the Forecasts item isn't available to add to the navigation menu.
Groups	Appears for organizations that have Chatter enabled. If you don't add this item to the navigation menu, groups are automatically included in the set of Smart Search Items instead and the Groups item is available from the Recent section.
Lightning component tabs	Only custom Lightning components that have a Lightning component tab associated with them can appear in the navigation menu.
Lightning pages	Custom app pages.
News	Displays the News app, a one-stop place for news and other insights about the user's accounts, contacts, leads, and opportunities.

Chapter 3 Configure Your Organization for the Salesforce App

Menu Item	Description
Notes	Displays the Notes app. If you don't add this item to the navigation menu, notes are automatically included in the set of Smart Search Items instead and the Notes item is available from the Recent section.
Paused Flow Interviews	Displays a list of flow interviews that the user paused. An interview is a running instance of a flow. Users can tap an interview and resume or delete it. Available in Salesforce mobile web only.
People	Appears for organizations that have Chatter enabled. If you don't add this item to the navigation menu, profiles are automatically included in the set of Smart Search Items instead and the People item is available from the Recent section.
Reports	Availability depends on edition and user permissions. If you don't add this item to the navigation menu, reports are automatically included in the set of Smart Search Items instead and the Reports item is available from the Recent section.
Smart Search Items	Adds standard and custom Salesforce objects to the Recent section in the menu. This item also adds a set of the user's recently accessed objects to the Recent section and adds the More item so users can access all the objects they have permission to use and that are supported. If you don't include this item in the navigation menu, users can't access any objects on the navigation menu.  Note: Smart Search Items is required for users to get search results in the Salesforce for Android. Users of the Salesforce for iOS and the Salesforce mobile web are able to search for records if this option is omitted from the navigation menu. If your iOS downloadable app users don't yet have a history of recent objects, they initially see a set of default objects in the Recent section. For Salesforce for Android and Salesforce mobile web, the default set of objects match the Lightning Experience Navigation Bar that the admin has configured in the Lightning App. If the user doesn't have access or permissions to the Lightning App, they also see a default set of objects until the user's most frequently used objects are determined. It can take up to 15 days for the objects that users work with regularly in both the Salesforce app and the full Salesforce site to appear in the Recent section. To make objects appear under Recent sooner, users can pin them from the search results screen in the full site.

Menu Item	Description
Tasks	Lists of a user's open and closed tasks and tasks that have been delegated. If you don't add this item to the navigation menu, tasks are automatically included in the set of Smart Search Items instead and the Tasks item is available from the Recent section.
Today	An app that helps users plan for and manage their day by integrating mobile calendar events with associated Salesforce tasks, accounts, and contacts. The app also allows users to instantly join conference calls, quickly log notes about events, and more. Available in Salesforce for Android and iOS only.
Visualforce page tabs	Only Visualforce pages with the <code>Available for Lightning Experience</code> , the <code>Salesforce app</code> , and <code>Lightning Communities</code> checkbox selected will display in the Salesforce app.

We'll touch briefly on Visualforce pages in a later chapter. To delve even deeper, see "Extending the Salesforce App with Visualforce Pages" in the [Salesforce App Developer Guide](#).

How the Navigation Menu Works

- The first item in the Selected list becomes your users' Salesforce app landing page.
- You can't set different menu configurations for different types of users.
- When organizing the menu items, put the items that users will use most at the top. The Smart Search Items element can expand into a set of eight or more menu items and it might end up pushing other elements below the scroll point if you put it near the top of the menu. Anything you put below the Smart Search Items element appears in the Apps section of the navigation menu.
- Before you can include Visualforce pages, Lightning pages, or Lightning components in the Salesforce app navigation menu, create tabs for them. From Setup, enter `Tabs` in the Quick Find box, then select **Tabs**.
- Anything represented by a tab in Salesforce—such as standard and custom objects, Visualforce pages, the Chatter feed, People, or Groups—is visible for a user in the Salesforce app menu, based on the user's profile settings. For example, if a user is assigned to a profile that has the Groups tab set to Tab Hidden, the user won't see the Groups menu item in the Salesforce app, even though an administrator has included it in the menu.

Some objects are excluded from the Recent section in the navigation menu, even if you accessed them recently.

Chapter 3 Configure Your Organization for the Salesforce App

- People, groups, notes, dashboards, reports, tasks, and events, if these items were added directly to the navigation menu
- List views, which are shown only on object home pages, not in the navigation menu
- Objects that aren't available in the Salesforce app, including any objects that don't have a tab in the full Salesforce site

About the Dashboards, Reports, Notes, Tasks, Events, Groups, and People Menu Items

If you opt to add the Dashboards, Reports, Notes, Tasks, Events, Groups, or People items to the Selected list for the navigation menu, these items appear in the order you specify, just like Today and other individual menu items.

If you don't add these items to the navigation menu, however, they're automatically included in the Smart Search Items set of objects and show up in the Recent section of the navigation menu.

Pin an Object into the Recent Section

Users can customize the objects that appear in the Recent section of the navigation menu. If they search for an object in the full site, they can hover their mouse over the object name and click  to pin it to the top of the search results. The order of pinned objects in the full site determines the order of the objects that stick to the top of the Recent section of the navigation menu. However, pinning objects in this way causes the unpinned objects remaining in the Recent section to drop into the **More** element.

In this chapter ...

- [How Page Layouts Work in the Salesforce Mobile App](#)
- [Rethink Your Page Layouts for Mobile](#)
- [Tips for Optimizing Page Layouts for Mobile](#)
- [Working with Compact Layouts](#)

After configuring your organization settings for the Salesforce app, consider what else you can optimize in the full Salesforce site to give your users the best possible mobile experience.

Two factors affect how information is displayed in the Salesforce app. One has been around for a while: page layouts. The other is newer: compact layouts. You'll learn about both in this chapter.

How Page Layouts Work in the Salesforce Mobile App

Use the enhanced page layout editor to customize the layout of an object's record detail pages, configure actions, and adjust which fields and related lists appear in the Salesforce mobile app.

In the Salesforce mobile app, page layouts drive these areas of the mobile experience.

Record Related Information and Detail Pages

When you view a record in the mobile app, you see the fields, Visualforce pages, and related lists that are based on the record type and the user's profile. Related lists show up as single-line cards containing the name of the page or related list. Tapping the related list card displays its details.

Mobile Cards

You can add expanded lookups, components, canvas apps, and Visualforce pages to the Mobile Cards section of your page layout to have them show up as mobile cards in the mobile app. The elements you place in this section don't show up on a record's detail page in the full Salesforce site. They appear only on the record's related information page in the mobile app.



Note: In organizations that are created after Spring '14, the Twitter component is added by default to the Mobile Cards section of page layouts for objects that support it.

Actions

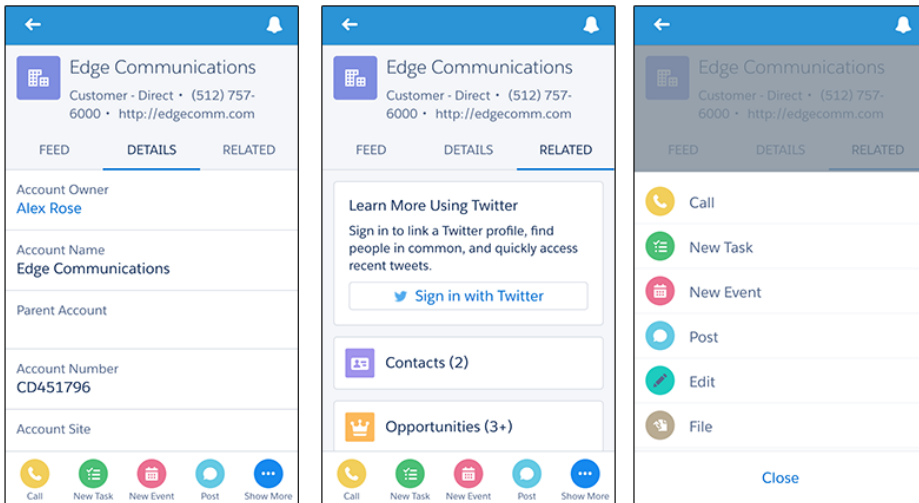
Actions in the Salesforce Mobile and Lightning Experience Actions section of a page layout appear in the action bar and action menu on the object's record pages.

Here are the record detail page, related information page, and action menu for a sample account, Edge Communications:

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** editions except Database.com



Rethink Your Page Layouts for Mobile

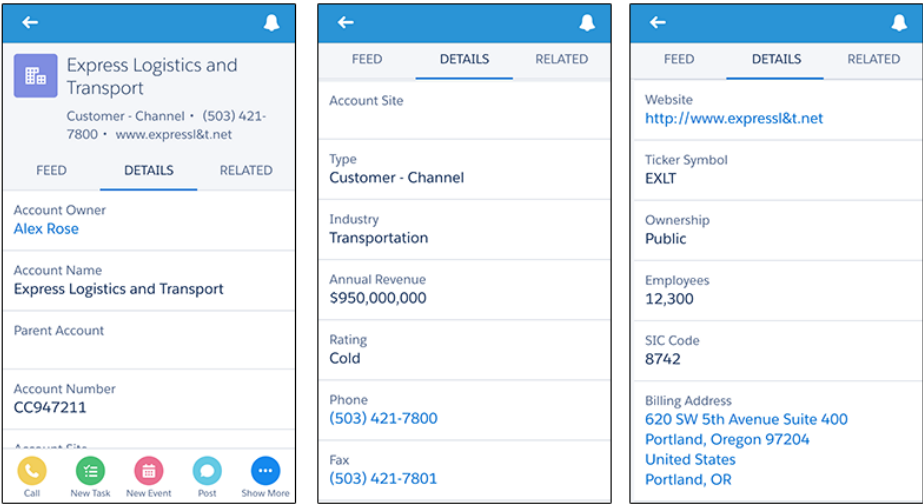
Page layouts containing dozens of fields and lots of related lists might be manageable when viewing records on a computer screen, but on a small mobile device, viewing that same record can be overwhelming. People accessing information using a mobile device are looking for a quick way to get what they need, and making your users sift through hundreds of fields and related lists just doesn't make sense.

For example, let's say you have a custom account page layout for Express Logistics and Transport, which has 32 standard and custom fields. That may not seem like a lot of fields, but in a mobile context, fields add up quickly. In the full Salesforce site, the account detail page for Express Logistics and Transport would look like this:

Chapter 4 Customize How Your Data Appears in the Salesforce App

Account Detail		Edit	Delete	Include Offline
Account Owner	 Admin User [Change]	Rating	Cold	
Account Name	Express Logistics and Transport [View Hierarchy]	Phone	(503) 421-7800	
Parent Account		Fax	(503) 421-7801	
Account Number	CC947211	Website	http://www.expressl&t.net	
Account Site		Ticker Symbol	EXLT	
Type	Customer - Channel	Ownership	Public	
Industry	Transportation	Employees	12,300	
Annual Revenue	\$950,000,000	SIC Code	8742	
Location				
Business Hours				
Time Zone				
Billing Address	620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States Portland, OR	Shipping Address	620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States	
Customer Priority	Medium	SLA	Platinum	
SLA Expiration Date	5/14/2013	SLA Serial Number	4724	
Number of Locations	150	Upsell Opportunity	Maybe	
Active	Yes			
Created By	Admin User , 10/16/2013 2:25 PM		Last Modified By	Admin User , 10/16/2013 2:25 PM
Description	Commerical logistics and transportation company.			
Custom Links	Billing			
Edit Delete Include Offline				

In the Salesforce app, the same account detail page looks like this:



We only show three here, but there were five pages of scrolling, and that’s from a page layout with only 32 fields! If you were a mobile user trying to find specific fields in a record detail with dozens of fields on

your phone, you'd have to scroll... and scroll... and scroll. It's not the best user experience and it's definitely not good for your users' productivity.

You have two options for handling page layouts for your mobile users: re-engineer your existing page layouts, or create new page layouts that are mobile-friendly from the outset.

Tips for Optimizing Page Layouts for Mobile

In many cases, creating a new mobile-only page layout may not make sense. Here are some tips and tricks to making your existing page layouts more mobile friendly.

When optimizing a page layout, consider:

- What are the important things to see at a glance?
- What are the important moments for your users when they're working in the Salesforce mobile app?
- What actions or processes can you automate so that your users don't have to manually do them?

The Key: Organize and Minimize Fields

- Use sections to organize information logically, putting the most important things at the top of the page so they show up first. Your users don't want to search for fields individually. Organizing similar fields in sections will help your users find what they need. They can then easily scroll down the page to the section they care about.
- For accounts, contacts, and leads, you don't need to put phone or email fields near the top. They're already quickly accessible via the  and  icons on each record page's action bar.
- You don't need to keep fields in one column, as the page will render dynamically based on the device that's viewing it. A phone will reorder the fields into a single column, and a tablet or desktop will show two columns.
- Put the most important fields into the compact layout—which drives record highlights and record preview cards in the mobile app—so they're available right up front, and so your mobile users don't have to drill into the record detail. We'll get into compact layouts in more detail soon.
- Keep the number of required fields to a minimum. Setting a field to required means it must appear on the detail page of all page layouts, so consider whether each field is truly required. You might have to convince stakeholders that a field isn't actually necessary for a record to be saved.
- If available in your organization, think about using record types so that fields that aren't common to all records don't have to appear on all records.
- To reduce the number of fields on a screen, consider using default values for new records instead of having the user enter the data.

Working with Compact Layouts

Page layouts aren't the only thing that you can use to customize how Salesforce data appears in a mobile environment. A compact layout displays a record's key fields at a glance in both the Salesforce mobile app and Lightning Experience.

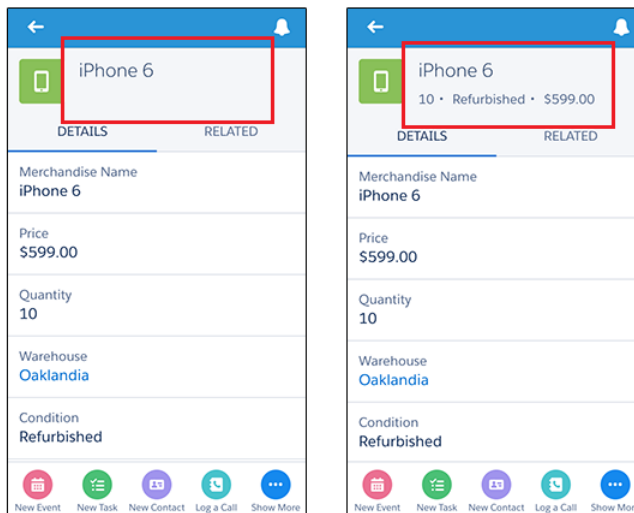
Creating and customizing compact layouts for objects isn't required for the Salesforce app, because system defaults are provided out of the box. However, we recommend using compact layouts to put important fields into object record headers—and elsewhere—to help your mobile users get the information they need quickly.

In the full Salesforce site, a compact layout determines which fields appear in the Chatter feed item that appears after a user creates a record with a quick action.

In the Salesforce mobile app, the first four fields that you assign to a compact layout appear in:

- An object record's highlights area
- Expanded lookup cards on a record's related information page

For example, here are screenshots of a merchandise record page in Salesforce before and after customizing the compact layout for the object.



If you put the key fields that your mobile users need on the compact layout for an object, they can get that information quickly just by scanning the highlights area of the record page.

As with page layouts, there are separate compact layouts for each object. By default, each object derives its record highlight fields, preview cards, and action-related feed items from the predefined set of fields in the object's read-only, system default compact layout. You can create custom compact layouts on an object-by-object basis. After you create one or more custom compact layouts, you set one as the primary compact layout for the object. The primary compact layout is then used as the new default for that object.

Compact Layouts

Here are a few more more tidbits about how compact layouts work.

Compact layouts support all field types except:

- text area
- long text area
- rich text area
- multi-select picklist

If a user doesn't have access to one of the fields that you assign to a compact layout, the next field on the layout is used.

Removing a field from a page layout doesn't remove it from the object's compact layout. The two layout types are independent.

Compact Layouts and Record Types

If you have record types associated with an object, you can override the object's primary compact layout and assign different compact layouts to some or all of the record types. Each record type can have only one compact layout assigned to it.

If you don't set any record type overrides, all record types use the object's primary compact layout by default.

To find out more about compact layouts and record types, see "Assign Compact Layouts to Record Types" in Salesforce Help.

In this chapter ...

- [Working with Quick Actions](#)
- [Object-Specific versus Global Actions](#)
- [Action Layouts](#)
- [Using Predefined Values in Actions](#)
- [Custom Actions](#)
- [Actions and Page Layouts](#)
- [Action Guidelines and Best Practices](#)

As an administrator, you can enable valuable micro-moments for all of your users by creating unique actions. When thinking about what actions you might want to create specifically for the Salesforce app, ask your users what they wish they could do in the mobile context.

For example, an administrator at a food service company could create an "Emergency Order" action that allows their delivery drivers to immediately order extra or missing food items using their mobile phone while still at a customer site. Creating actions for the Salesforce app can drive adoption in your organization and make you a hero to your users!

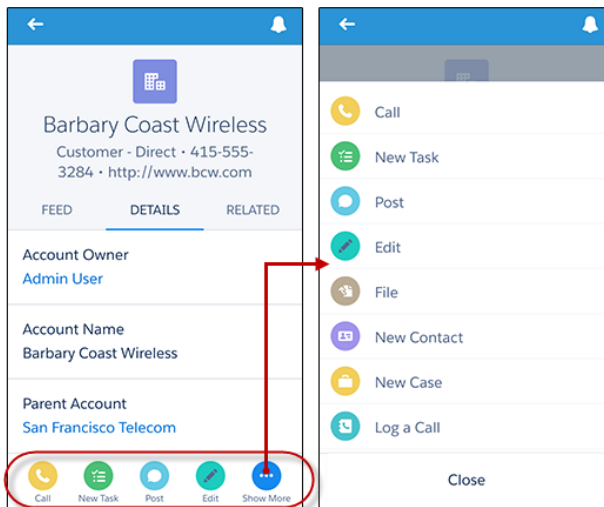
In this chapter, we'll learn about types and categories of actions, how to create and customize them in Salesforce using point-and-click tools, and how they can help mobile users get essential work done while away from the office.

Working with Quick Actions

Quick actions enable users to do more in Salesforce and in the Salesforce mobile app. With custom quick actions, you can make your users' navigation and workflow as smooth as possible by giving them convenient access to information that's most important. For example, you can let users create or update records and log calls directly in their Chatter feed or from their mobile device.

Create quick actions, and add them to your Salesforce Classic home page, to the Chatter tab, to Chatter groups, and to record detail pages. Choose from standard quick actions, such as create and update actions, or create custom actions based on your company's needs.

Salesforce Mobile App Actions in the Action Bar and Action Menu



After creating quick actions, you can customize them. Quick actions have their own action layouts, which let you specify which fields are included in the action, and in which order.

Follow these steps when setting up actions for the Salesforce app.

1. Create a global or object-specific action.
2. Customize the action's layout, choosing the fields users see when they use it.
3. If you created an object-specific action, add it to one or more of that object's page layouts. If you created a global action, add it to a global publisher layout.
4. Set predefined field values for required fields, where possible.

Let's learn a little more about the types and categories of actions. First we'll look at global and object-specific actions.

Object-Specific versus Global Actions

Regardless of what kind of action you're going to create, the first thing you need to determine is whether it should be object-specific or global. This decision should be based on whether you need your action to be explicitly tied to an object, and where you want the action to display.

Let's go over the differences.

Object-Specific Actions

You create object-specific actions in the context of the object. From the management settings for the object for which you want to create an action, go to **Buttons, Links, and Actions**. You can add an object-specific action only to page layouts for that object.

There are five types of object-specific actions.

- Object-specific create actions create records that are automatically associated with related records. For example, you add an object-specific action on the Account object that creates contacts. If a user creates a contact with that action on the detail page for the Acme account, that new contact is associated with Acme.
- Object-specific Update a Record actions make it easy for users to edit records. You can define the fields that are available for update.
- Object-specific Log a Call actions let users enter notes about calls, meetings, or other interactions that are related to a specific record.
- Object-specific custom actions invoke Lightning components, flows, Visualforce pages, or canvas apps that let users interact with or create records that have a relationship to an object record. The Visualforce page for an object-specific custom action must include the standard controller for the relevant object. For example, use the standard contact controller to create a custom action that lets users import a contact's Twitter profile and add that information to a contact record.
- Object-specific Send Email actions, available only on cases, give users access to a simplified version of the Case Feed Email action in the Salesforce mobile app. You can use the case-specific Send Email action in Salesforce Classic, Lightning Experience, and the Salesforce mobile app.

Global Actions

You create global actions in a different place in Setup than you create object-specific actions. To create a global action, from Setup, enter *Actions* in the **Quick Find** box, then select **Global Actions**. They're called *global actions* because they can be put anywhere actions are supported.

Global create actions enable users to create object records, but the new record has no direct relationship with other records.

Add Log a Call actions to global layouts to let users record call details. For example, users can log calls from global pages in Salesforce Classic, such as the Home page and the Chatter tab, or in the Salesforce mobile app from the Feed or Groups pages. In Lightning Experience, Log a Call actions on global layouts display in the Global Actions menu.

Use a Visualforce page, Lightning component, or a canvas app to create global custom actions for tasks that don't require users to use records that have a relationship to a specific object.

For more information, see [Custom Actions](#) on page 36.



Note:

- Actions to create records for an object that is the detail object in a master-detail relationship must be object-specific, not global.
- Chatter groups with customers don't support global create, log a call, or custom actions and display only standard Chatter actions, such as Post, File, Link, and Poll.

After you create an object-specific or global action, you must add it to a page layout or the global publisher layout before it will appear in the Salesforce app. For more information, see [Actions and Page Layouts](#) on page 37.

For a list of supported objects for object-specific and global actions, see "Object-Specific Actions" and "Global Quick Actions" in Salesforce Help.

More Action Types

Quick actions that you create can be global or object-specific, but those aren't the only kinds of actions available in Salesforce. Other types of actions, some predefined by Salesforce, are also available for you to put to work for your users.

There are several categories of actions, such as standard Chatter actions, default actions, mobile smart actions, custom actions, and productivity actions.

- **Standard Chatter actions**—Standard Chatter actions are available only when Chatter is enabled. The standard Chatter actions are Post, Poll, Question, and Announcements (groups only). Salesforce Classic standard actions also include File, Link, and Thanks (Work.com).
- **Default actions**—Default actions are sets of predefined actions to get you and your users started using actions in your org.
- **Mobile smart actions**—Mobile smart actions are a set of preconfigured actions supported on the same list of objects as default actions. Mobile smart actions appear as a single action element in the page layout editor. In the Salesforce mobile app, the Mobile Smart Actions element expands to distinct create actions that enable users to create records directly from the action bar.
- **Custom quick actions**—Custom quick actions are actions that you create and customize, such as Create a Record, Send Email, or Log a Call actions. They can also invoke Lightning components, flows, Visualforce pages, or canvas apps with functionality that you define. Custom actions can be global or object-specific and break down into subtypes, which we'll get into shortly.
- **Productivity actions**—Productivity actions are predefined and attached to a limited set of objects. Productivity actions include Send Email, Call, Map, View Website, and Read News. Except for the Call action, you can't edit or delete productivity actions.

Which actions are available in the full Salesforce site depends on whether your org has Chatter, feed tracking, and actions in the publisher enabled. Actions in the Salesforce mobile app don't rely on whether Chatter or actions in the publisher are enabled. For how Chatter enablement affects action visibility, see [Actions with and without Chatter](#).

Action Layouts

Just as object record pages have page layouts that can be customized, actions have action layouts that can be customized. You can add, remove, or reorder fields on the action layout to present only the essential items your users need when they're taking the action.

To customize the layouts of your global actions, in Setup, enter *Actions* in the Quick Find box, then select **Global Actions**. (If you're in Salesforce Classic, click **Publisher Layouts**.) Then click **Layout** next to a global action in the list.

To customize the layouts of your object-specific actions, from the management settings for an object, find Buttons, Links, and Actions.

- If you're using Salesforce Classic, from Setup, enter an object name in the Quick Find box, select **Buttons, Links, and Actions**, and then click **Layout** next to an action in the list.
- If you're using Lightning Experience, from Setup, at the top of the page, click **Object Manager**. Select an object from the list and then click **Buttons, Links, and Actions**. Click **Edit** next to the name of an action.

Chapter 5 Using Actions in the Salesforce App

The first time you view the layout for an action you've created, certain fields are prepopulated: target object default fields, standard required fields, and any custom universally required fields.

Use the action layout editor to specify which fields to include in the layout.

The screenshot shows the 'Action: New Contact' layout editor. At the top, there's a title bar with 'Action: New Contact' and a 'Help for this Page' link. Below the title bar is a toolbar with buttons: 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', and 'Redo'. The main area is divided into two sections. The top section is the 'Contact Fields' palette, which contains a search bar labeled 'Quick Find' with the text 'Field Name'. Below the search bar is a table of available fields:

☐ Blank Space	Birthdate	Description	Fax	Lead Sou
Account Name	Contact Owner	Do Not Call	Fax Opt Out	Level
Assistant	Data.com Key	Email	Home Phone	Mailing A
Asst. Phone	Department	Email Opt Out	Languages	Mobile

The bottom section is the action layout, which displays the following fields:

Name *
Sarah Sample

Email
sarah.sample@company.com

Phone
1-415-555-1212

Account Name
Sample Account

Title
Sample Title

The upper part of the action layout editor is the palette, and below the palette is the action layout. The palette contains fields from the action's target object that you can add to the action layout, except for the following unsupported field types:

- Record type fields
- Read-only field types such as roll-up summary, formula, and auto-number fields
- Read-only system fields such as `Created By` or `Last Modified By`

Inactive Fields

Fields that are already on the action layout still appear on the palette but are inactive. When you select an inactive field on the palette, Salesforce highlights the field on the action layout.

Field Type Conversion

If you convert a field's type from one that is supported for actions to a type that isn't supported, Salesforce removes the field from the action layout. If you convert the field back to a supported type without changing the action layout, Salesforce automatically adds the field back to the layout. If you edit the layout, and then convert the field back to a supported type, add the field back to the layout manually.

Layouts Used for Log a Call Actions

A Log a Call action takes the active task page layout except under the following conditions:

- Suppose that your organization has a custom Log a Call action for an object. The custom action takes the custom action layout defined for it. Now suppose that your organization has a custom Log a Call global action. That action takes the custom layout defined for it, unless you also have a custom Log a Call action for an object. (A custom action on an object overrides a custom global action.)
- To display the simpler New Task form to Salesforce mobile app users, enable the form in Activity Settings and ensure that the layout used includes a subject field.

Layout Auditing

Salesforce tracks action layout customization in the setup audit trail history.

Using Predefined Values in Actions

Setting up *predefined values* for certain fields on actions can increase your mobile users' productivity and optimize the action for the mobile environment at the same time.

When you configure action layouts, it's better to use fewer fields. Most users, especially mobile users, don't like to fill in a lot of required fields. They want to get things done and move on to their next task. A good way to use fewer fields in action layouts is to set predefined values for as many fields as possible. The more fields you can set predefined values for, the more you can remove from the layout and make the action easier and quicker to use. Balance ease of use with the need for required information. However, don't remove required fields from an action layout without setting a predefined value for those fields, or when a user applies that action, the record won't save properly.

If you set predefined values for fields on object records created through an action, you don't need to add those fields to the action layout.

For example, when you configure an action that lets users create opportunities, set Prospecting as the predefined value for the Stage field. All new opportunities users create through that action are automatically assigned to the prospecting stage. You can remove the Stage field from the action's layout, because the field is going to be assigned a value automatically.

To set predefined values for object-specific actions, from your object management settings, select an object, and then scroll down to the Buttons, Links, and Actions section. To set predefined values for global actions, enter *Actions* in the *Quick Find* box, then select **Global Actions**. On the action list page for either type, click the name of the action, and then click **New** in the Predefined Field Values related list.

You can set predefined values for any field available in the action layout editor, with these exceptions.

- Multi-select picklists
- Read-only field types like auto-number, formula, and roll-up summary fields

Predefined values for fields on actions are different from default values that you can set for fields on records. If a field is included in an action, it can have both a predefined value set for the action and a default value set.

If a field on an action has both a predefined value and a default value set, the action uses the predefined value, not the default value.

On object-specific actions, the predefined value can include references to the source object and its related objects.



Tip: You can remove a required field from the action layout, but make sure that the field has a predefined value. Otherwise, users can't create records.

Custom Actions

Custom actions invoke Lightning components, flows, Visualforce pages, or canvas apps with functionality that you define.

You can create object-specific and global custom actions.

Object-specific custom actions invoke Lightning components, flows, Visualforce pages, or canvas apps that let users interact with or create records that have a relationship to an object record. The Visualforce page for an object-specific custom action must include the standard controller for the relevant object. For example, use the standard contact controller to create a custom action that lets users import a contact's Twitter profile and add that information to a contact record.

Use a Visualforce page, Lightning component, or a canvas app to create global custom actions for tasks that don't require users to use records that have a relationship to a specific object. Canvas apps that you want to use as custom actions require Publisher as a location. To call Lightning components from custom actions, you must have My Domain deployed in your org. Visualforce pages that you want to use as global custom actions can't use standard controllers. For example, you want a custom action that lets users enter a street address and see a map, the local time, and the local weather. For this action, create a Visualforce page that doesn't use any of the standard controllers, and add it as a custom global action.

You create a Visualforce custom action in the same way you create a regular object-specific or global action. However, when you select the action type, select Custom Visualforce instead of Create a Record or Log a Call. Then, select the Visualforce page you want to use for the action.

Creating custom actions for canvas apps is more complex, and we won't discuss them in depth here. You can find out more about canvas apps and custom actions in the [Salesforce App Developer Guide](#).



Note: Chatter groups with customers don't support global create, log a call, or custom actions and display only standard Chatter actions, such as Post, File, Link, and Poll.

Actions and Page Layouts

Before an action can appear in both the full Salesforce site and the Salesforce app, you must add it to a page layout.

Global Page Layouts

What is a global page? The Home page, the User Profile page, and the Chatter home pages are all examples of global pages in Salesforce Classic. A *global publisher layout* drives the actions displayed on these pages. A global publisher layout is like a page layout, but it contains only the Quick Actions in the Salesforce Classic Publisher and Salesforce Mobile and Lightning Experience Actions sections.

Global publisher layouts determine the global actions that appear in the various Salesforce interfaces. In Salesforce Classic and Lightning Experience, these layouts customize the actions on global pages (like the Home page) and on the Chatter page. Lightning Experience also uses these layouts to populate the Global Actions menu. And in the Salesforce app, these layouts drive the actions that appear in the action bar on the Feed and People pages. Global publisher layouts can include global actions only.

You can assign different global publisher layouts to different user profiles to customize which actions users see by default on global pages.

To create a custom global publisher layout, or to customize the default global layout, in Setup, enter *Publisher Layouts* in the Quick Find box, then select **Publisher Layouts**. After you've defined a global publisher layout, click **Publisher Layout Assignment** to assign it to user profiles.

Object Page Layouts

Object-specific actions can be added only to page layouts for the object to which they are assigned. However, you can add global actions to the page layout of any object that supports actions.

You can customize the actions that show up on object page layouts—like those for Account, Opportunity, and Contact—by using the page layout editor. Actions added to the Quick Actions in the Salesforce Classic

Publisher section of an object's page layout appear in the Chatter publisher for that object in the full Salesforce site. Actions added to the Salesforce Mobile and Lightning Experience Actions section of an object's page layout appear in the action bar on the object's record pages in the Salesforce app.

If you haven't customized the Quick Actions in the Salesforce Classic Publisher section of a page layout, the actions that appear in the publisher for that object default to the actions that are assigned to the global publisher layout. Upon overriding, the actions default to the standard actions—Post, File, Link, Poll, Question, and Thanks—regardless of what actions were assigned to the global publisher layout.

If you haven't customized the Salesforce Mobile and Lightning Experience Actions section of a page layout, the actions for that object default to a set of predefined actions. If you have customized actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, the Salesforce Mobile and Lightning Experience Actions section inherits the actions from the Quick Actions in the Salesforce Classic Publisher section, plus any standard or custom buttons present on the layout, when you click to override.

Action Guidelines and Best Practices

Actions are a great way to let your users get work done quickly. As an administrator, you're in a prime position to give them the exact actions that they need.

When considering what kinds of actions to create, or even when creating the actions themselves, keep these suggestions in mind.

- When customizing action layouts, consider what your users will do with them. Minimalism is key. Include only the fields that are necessary for them and for whomever handles the cases, calls, or records that result from those actions.
- Don't use actions for simple navigation shortcuts. They're designed to perform a function.
- Give your actions task-oriented names that tell your users what they do. Use terms such as New, Create, Share, Update, or Import. Keep names short and descriptive.
- Create a global action if you're contemplating something that your users need to do that isn't tied to a specific object and that you want to be accessible from anywhere.
- Use the `Description` field to create notes for yourself about each action. Notes are especially useful if you're creating several similar actions for different record types, for example. The description appears in the list of buttons, links, and actions for object-specific actions, or in the list of global actions, as well as on the detail page for the action. Your notes aren't visible to users.
- There is no hard limit to the number of fields you can add to an action layout. However, for optimum usability, we recommend a maximum of 8 fields. Adding more than 20 fields can severely impact user efficiency. To reduce the number of fields in your layout, you can [create predefined values](#) for the

required fields, and then remove those fields from your layout. You can set predefined field values from the action detail page.

In this chapter ...

- [Get Your Visualforce Pages into the Salesforce App](#)
- [Visualforce Page Support in the Salesforce App](#)

You can use Visualforce to extend the Salesforce app and give your mobile users the functionality that they need while on the go.

For example, you can include a Visualforce page that shows a mobile user the location of a selected account on a Google map. In the Salesforce app, this page appears as a mobile card on the account record's related information page.

Get Your Visualforce Pages into the Salesforce App

Visualforce pages must be enabled for mobile use before they can display in the Salesforce app. You can do this in Setup by entering *Visualforce Pages* in the **Quick Find** box, then selecting **Visualforce Pages**, then click **Edit** next to a page name, and select the **Available for Lightning Experience, Lightning Communities, and the mobile app** checkbox on that page.



Tip: Just because you've enabled a Visualforce page for mobile doesn't mean that it's automatically mobile friendly. Before exposing existing Visualforce pages in the Salesforce app, consider how they'll look and function on mobile phones and tablets. Most likely, you'll want to create a new page specifically for mobile form factors.

Visualforce pages can display in these areas of the Salesforce app user interface:

- The navigation menu, via a Visualforce tab
- The action bar, via a custom action
- Mobile cards on a record's related information page
- Overridden standard buttons, or custom buttons and links
- Embedded in record detail page layouts
- Lightning pages

If you want to dig deeper into customizing the Salesforce app with Visualforce, and discover lots of best practices to use when designing your pages for the app, check out the Visualforce chapters of the [Salesforce App Developer Guide](#).

Visualforce Page Support in the Salesforce App

Keep these considerations in mind when you're working with Visualforce pages in the Salesforce app.

- Standard tabs, custom object tabs, and list views that are overridden with a Visualforce page aren't supported. The Visualforce page is shown for full site users, but Salesforce app users will see the default Salesforce page for the object. This restriction exists to maintain the Salesforce app experience for objects.
- You can also enable Visualforce pages for the Salesforce app through the metadata API by editing the `isAvailableInTouch` field on the `ApexPage` object.

In this chapter ...

- [Access Data in the Salesforce App While Offline](#)
- [Create, Edit, and Delete Records in the Salesforce App While Online or Offline \(Beta\)](#)
- [Data and UI Elements That Are Available When the Salesforce App is Offline](#)
- [Enable Offline Access and Edit for the Salesforce App](#)

Your mobile users' productivity doesn't have to stop when there's no connectivity. When you enable caching and Offline Edit, users can keep working, unimpeded by a subway commute, FAA regulations, capricious cellular signals, or bunker-style buildings. Offline access is available for Salesforce for Android and Salesforce for iOS. The beta version of Offline Edit requires version 10.0 of Salesforce for Android or Salesforce for iOS.

Manage caching and Offline Edit from Setup—enter *Offline* in the Quick Find box, then select **Salesforce Offline**.

Access Data in the Salesforce App While Offline

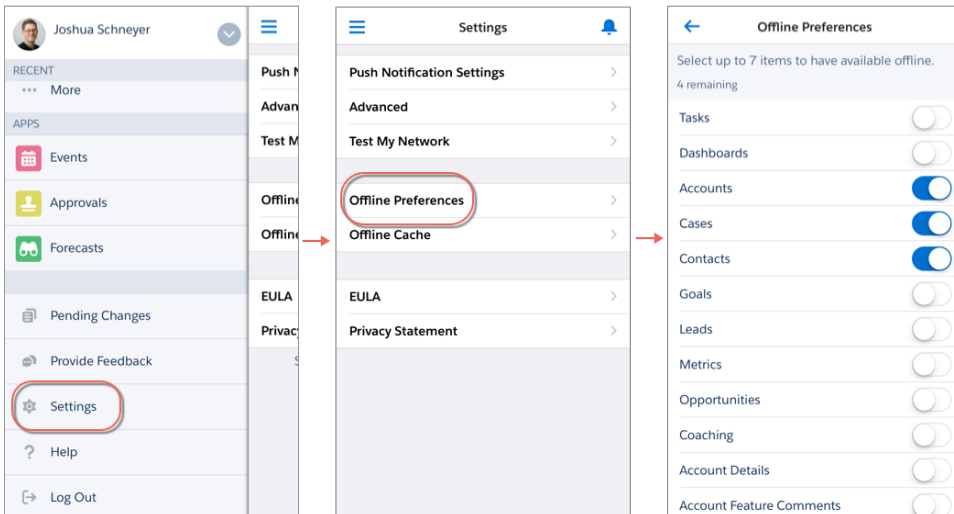
With caching in the Salesforce app enabled, your Salesforce for Android and iOS users can see important data when working offline or when the mobile app can't connect to Salesforce. The app caches a set of a user's recently accessed records so they're available for viewing without a connection. And much of the data that a user accesses throughout a Salesforce session is also added to the cache. Cached data is encrypted and stored in a secure, persistent data store.

Caching in the Salesforce app is enabled the first time someone in your org installs Salesforce for Android or Salesforce for iOS.

The contents of a user's cache determines the data that's accessible when the user's mobile device is offline. Let's look at how the cache is initially populated and then updated throughout a Salesforce app session.

 **Note:** A session is the time between logging in to and out of the app. Putting the app in the background by switching away to a different app doesn't end a session.

- When a user logs in, the cache is empty. If the user's device goes offline with an empty cache, no Salesforce data is available.
- To customize their cache, users can go to the navigation menu, select **Settings > Offline Preferences**, and then select up to seven items that they want to be available offline. If users change their minds, they can easily go back and choose new items.



If a user chooses not to customize their cache, Salesforce populates the user's cache with up to 30 recently accessed records for their five most recently accessed objects. In addition to these records,

the user's tasks listed under **My Tasks** and their five most recently accessed dashboards are cached. However, if the user chooses at least one item from the Offline Preferences page, this selection replaces the existing cache with their new preferences.

Recently accessed records are determined by a user's activities in both the app and the full Salesforce site, including Salesforce Classic and Lightning Experience.

Whether users customize their cache or stick with their recently accessed records, they can quickly populate their cache in two ways. Users can put Salesforce in the background by switching away to a different app or navigating to their device's home screen to populate their cache. Or users can go to the Salesforce navigation menu, select **Settings > Offline Cache > Cache Now**.



Tip: We recommend that your users populate their cache each time they log in to Salesforce so they're guaranteed to have a meaningful set of available data when offline.

Depending on the size and complexity of a user's records, caching can take a few seconds to a couple of minutes. If the user goes offline before the cache is fully updated, some of the expected records won't be available.

After users initially populate their cache, users can refresh their cache in two ways. If the last cache refresh is more than one hour old, users can put Salesforce in the background by switching away to a different app or navigating to the device home screen to refresh the cache. Or users can manually refresh the cache by going to the navigation menu, select **Settings > Offline Cache > Cache Now**.

- Throughout a session, many of the other records that the user accesses are also added to the cache.
- A record remains in the user's cache for 30 days. Each time the same record is accessed, the clock resets. But if the record isn't touched within 30 days, it's automatically removed from the cache and won't be available offline until the user accesses the record again.
- Logging out of Salesforce removes all data from the cache. The next time the user logs in, the process of generating the cache starts over.

Create, Edit, and Delete Records in the Salesforce App While Online or Offline (Beta)

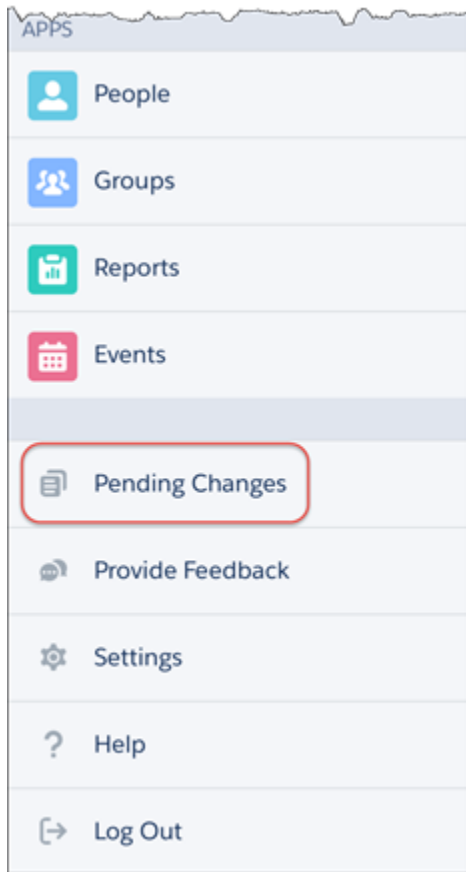
Whether online or offline, Salesforce for Android and Salesforce for iOS users can create, edit and delete records and keep track of all of the changes from the Pending Changes page. The Salesforce app automatically syncs those pending changes to Salesforce and warns the user if there are conflicts that need to be resolved. The beta version of Offline Edit requires version 10.0 or later of Salesforce for Android or Salesforce for iOS.

Chapter 7 Work Offline with the Salesforce App

 **Note:** This release contains 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. Make your purchase decisions only based on generally available products and features. You can provide feedback and suggestions for Offline Edit in the [IdeaExchange in the Trailblazer Community](#).

Keep Track of Updates

Users can keep track of all changes made while online or offline from the Pending Changes page. This page is available from the Salesforce app navigation menu.



Understanding the Status of Updates

To help users monitor the status of changes made while online or offline, visual indicators display in several places in the Salesforce app, including: the Pending Changes page, object home pages, and in the highlights area on updated records.

- : Indicates that there are no conflicts to changes made while online or offline. Records disappear from the Pending Changes page after successfully syncing to Salesforce.
- : Indicates that there are conflicts to changes that must be resolved.
 - If the changes are made while online, the  appears immediately to indicate that there are conflicts.
 - If the changes are made while offline, the  appears when network connectivity is restored to indicate that there are conflicts.

Pending changes may contain conflicts for several reasons:

- Validation rule error
- Apex trigger error
- Workflow rule error
- Duplicate rule error

If users encounter conflicts when saving a record, whether online or offline, they must go to the Pending Changes page to see the details of the error. Users can tap on a record where  appears, and they are taken to a Conflict Resolution page to resolve the issue. After the conflict is resolved, the record disappears from the Pending Changes page after successfully syncing to Salesforce.

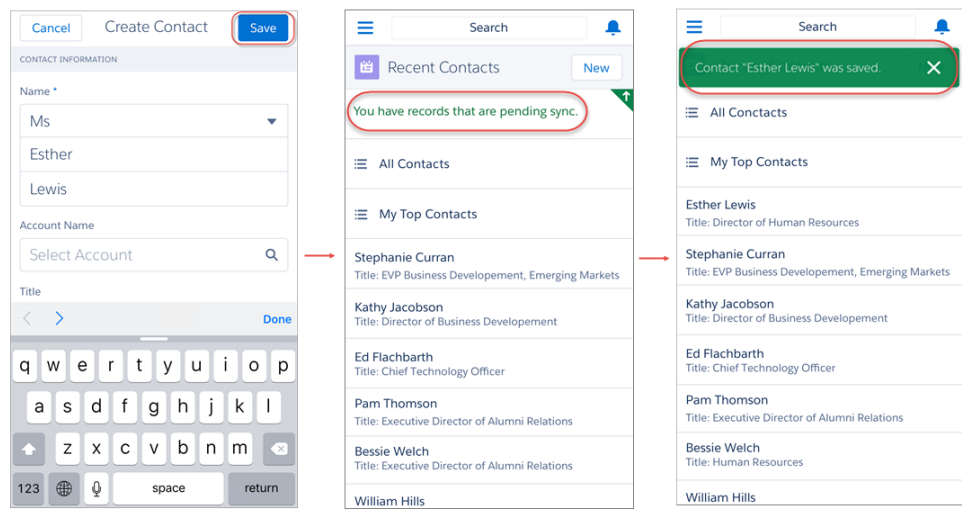
- : Indicates that an error has occurred.
 - If the changes are made while online, the  appears immediately to indicate an error.
 - If the changes are made while offline, the  appears when network connectivity is restored to indicate an error.

When users tap on a record where  appears, they are taken to the edit page of that record to fix the error.

While rare in occurrence, sometimes an error is irreconcilable. For example, if an edit is made to a record while offline and someone else deleted that record from Salesforce, the  that appears on

Chapter 7 Work Offline with the Salesforce App

that change is irreconcilable. In this scenario, users can only dismiss the irreconcilable change from the Pending Changes page.



Data and UI Elements That Are Available When the Salesforce App is Offline

With Salesforce app caching and Offline Edit, Salesforce for Android and Salesforce for iOS users can work with many of their frequently accessed objects and records while offline. Here’s the list of data and Salesforce app user interface elements that are available offline.

Salesforce Data / Salesforce App 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 Other actions: No
Global Search	Previous search results from current session	n/a

Salesforce Data / Salesforce App Element	Available for Offline Viewing	Available to Create, Edit, or Delete Offline (Beta)
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 Salesforce app navigation menu	Yes, recently accessed records for the first five objects (excluding Files) in the Recent section of the Salesforce app 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

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Salesforce Data / Salesforce App Element	Available for Offline Viewing	Available to Create, Edit, or Delete Offline (Beta)
Visualforce pages	No	No
Canvas Apps	No	No
Lightning pages	No	No
Salesforce App Settings	Yes	n/a

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

Enable Offline Access and Edit for the Salesforce App

With just a few clicks, you can protect your Salesforce app users against the vagaries of mobile connectivity. You can enable two levels of offline access: caching frequently accessed records, so users can view data while offline, and Offline Edit, so users can create, edit, and delete records while offline. Offline access is available in Salesforce for Android and iOS only. The beta version of Offline Edit is available in Salesforce for Android and Salesforce for iOS version 10.0 or later.

1. From Setup, enter *Offline* in the Quick Find box, then select **Salesforce Offline**.

2. To allow viewing data while offline, select *Enable caching in Salesforce for Android and iOS*.

This option is automatically enabled the first time someone in your org installs either Salesforce for Android or Salesforce for iOS.

3. To allow updating records while offline, select *Enable offline create, edit, and delete in Salesforce for Android and iOS*.

This option isn't available if caching in the Salesforce app is disabled.

4. Click **Save**.



Tip: We strongly recommend leaving *Enable caching in Salesforce for Android and iOS* enabled. In addition to making cached data available offline, this setting also enables faster viewing of previously-accessed records and better overall performance. If you disable caching, Salesforce for Android and iOS only store the minimum data required to maintain a session. This can impact performance because the app has to refresh record details and feed items every time they're viewed.

EDITIONS

Setup for the Salesforce app available in: both Salesforce Classic and Lightning Experience

Available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Available in Salesforce Classic in: **All** editions except Database.com

USER PERMISSIONS

To view Salesforce app settings:

- View Setup and Configuration

To modify Salesforce app settings:

- Customize Application
Modify All Data

CHAPTER 8 Make the Salesforce App Yours with Custom Branding

In this chapter ...

- [How Salesforce App Branding Works](#)
- [Tips for Branding Your Salesforce App](#)

You can customize the Salesforce app to match some aspects of your company's branding, so the app is more recognizable to your mobile users. Custom branding is displayed in all versions of the Salesforce app.

How Salesforce App Branding Works

You can customize branding for your Salesforce app. From Setup, enter *Salesforce Branding* in the Quick Find box, then select **Salesforce Branding**.

Prerequisites

Images that you upload to customize the Salesforce app are stored in a Documents folder named Salesforce Branding Resources. For this reason, the Documents object must be enabled for your organization before administrators can view and modify the Salesforce app branding page. (The Documents tab doesn't need to be visible, however.)

For users of Salesforce mobile web to see custom branding, Documents must be enabled for your organization. For Salesforce for Android and Salesforce for iOS, users must also have "Read" user permissions on Documents.

What You Can Customize

Element	Description
Brand Color	The color for key user interface elements such as the header, buttons, and search bar. Based on the brand color you select, contrasting colors for user interface elements such as borders for the navigation menu, the notifications list, and button text are automatically defined. The headers on overlays, popups, and dialogs—such as edit and create windows or windows that open from actions in the action bar—aren't affected by this setting. These headers are always white, to provide a visual indicator that the user is performing an action as opposed to simply viewing information.
Loading Page Color	The background color on the loading page that appears after a mobile user logs in.
Loading Page Logo	The image on the loading page that appears after a mobile user logs in. We recommend using an image with the largest dimensions allowable for best results. Maximum image size is 460 pixels by 560 pixels.

You can also customize the branding for the Salesforce app login page. My Domain must be enabled to modify the login page. To customize your company's Salesforce app login page, see [Customize Your My Domain Login Page](#).

Tips for Branding Your Salesforce App

If you're thinking about rebranding the Salesforce app, here are some tips to keep in mind.

- When considering color schemes, fonts, and other branding changes, refer to the [Salesforce App Style Guide](#).
- When creating your logo image, be sure to compress it. In many image editing programs, this process is identified as "use compression," "optimize image," "save for web," or "shrink for the web."
- Verify that your logo appears correctly in Salesforce app, using the same devices as your user base, not just a desktop monitor. Your image can render at different scales or proportions depending on the screen size and pixel density of each device.
- The Salesforce app supports `.png`, `.gif`, and `.jpg` image formats for custom branding elements, but we recommend using `.png` for the best results.
- These interface elements can't be customized:
 - The Salesforce app icon that appears on the mobile device's home screen.
 - The initial loading screen when launching Salesforce for iOS. This loading screen appears before the user is prompted by the login page.
- Your mobile users must close the app and then log in again to see any custom branding changes.

CHAPTER 9 Learning More

If you want to explore more of what you can do with Salesforce, these resources can help.

Salesforce App Rollout Guide

After you've configured your organization and customized it for the Salesforce app, it's time to roll out the apps to your users. Visit this site to see Salesforce's five steps to a successful rollout.

Salesforce App Developer Guide

A composite book with both administrator and developer content that walks you through the Salesforce app using a series of tutorials with sample data in a Developer organization. Includes chapters on page layouts, compact layouts, actions, customization, Visualforce, canvas apps, and custom actions.

Trailhead Module: Salesforce Mobile Basics

A fun, interactive way to learn about the Salesforce app in a browser by walking through exercises in a Developer Edition organization, taking challenges, and earning badges.

Salesforce Help & Training Portal

A site devoted to the help documentation for Salesforce. Get help for what you're working on, find answers to your questions, and download tip sheets and other guides.

Salesforce Trailblazer Community

Home to a set of extremely useful tools to help you get your Salesforce work done. Connect with Salesforce customers, partners, product specialists and employees to learn, get answers to your questions, and share new ideas.

CHAPTER 10 Appendices

In this chapter ...

- [How Actions Are Ordered in the Salesforce Mobile App Action Bar](#)
- [How Predefined Actions Are Ordered in the Salesforce Mobile App Action Bar and List Item Actions](#)
- [Actions with and without Chatter](#)
- [Salesforce App Features: What's Available in Each Version](#)
- [Salesforce Editions and Licenses](#)

One of the goals of this guide is to help you, as an administrator, navigate the sometimes complex world of the Salesforce app. In these appendices, we've included some extra material that we hope you'll find useful, including edition and license information, a chart outlining the feature support differences between different flavors of the Salesforce app, and more.

How Actions Are Ordered in the Salesforce Mobile App Action Bar

The Salesforce Mobile and Lightning Experience Actions section of a page layout and global publisher layout drives which actions appear in the Salesforce mobile app action bar. It also enables you to customize the order of quick actions, productivity actions, and standard and custom buttons that are available as actions.

If you customize the Salesforce Mobile and Lightning Experience Actions section of a layout, the mobile app reflects your customizations.

If you customize the Quick Actions in the Salesforce Classic Publisher section, but not the Salesforce mobile app section, the actions in the mobile app action bar are a combination of those in the Quick Actions in the Salesforce Classic Publisher section plus any standard or custom buttons present on the page layout.

When you click to override the predefined actions in the Salesforce Mobile and Lightning Experience Actions section, the custom buttons in the buttons section of the page layout aren't automatically included in the action list. You must add the custom buttons as actions from the Mobile & Lightning Actions category in the palette.

If neither section is customized, the action bar inherits a default set of actions predefined by Salesforce. The sets of actions differ between objects, based on the most common or typical activities required for each object.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Quick actions available in:
Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, Database.com, and **Developer** Editions

Custom canvas actions available in: **Professional** (with Canvas enabled), **Enterprise, Performance, Unlimited,** and **Developer** Editions

How Predefined Actions Are Ordered in the Salesforce Mobile App Action Bar and List Item Actions

Your org's page layouts and publisher layouts control the order in which actions appear in the Salesforce mobile app action bar and list item actions. If you don't customize the actions in the action bar on a page layout or global publisher layout, the location of key actions is predefined by Salesforce.

 **Important:** This predefined ordering chart applies to the Salesforce mobile app action bar only if you *haven't* customized the Salesforce Mobile and Lightning Experience Actions section of an object's page layout or on a global publisher layout.

The quick actions in the predefined set are derived from the actions in the “Quick Actions in the Salesforce Classic Publisher” section of the object page layout or global publisher layout.

On object page layouts, when the Salesforce mobile app section isn’t customized:

If you’ve customized the actions in the Quick Actions in the Salesforce Classic Publisher section, the quick actions in the action bar reflect those customizations.

If neither section is customized, the quick actions you see in the action bar come from the Quick Actions in the Salesforce Classic Publisher section of the global publisher layout.

On global publisher layouts, when the Salesforce mobile app section isn’t customized:

If the Quick Actions in the Salesforce Classic Publisher section is customized, the quick actions in the action bar inherit those customizations.

If neither section is customized, the quick actions in the action bar for global pages default to a Salesforce predefined set.

The predefined actions in the action bar, list item actions, and associated action menus are divided into groups. The arrangement of these groups is fixed. The order of actions within the groups can vary based on the object and the actions that are present on the global publisher layout or on an object’s page layout. Not every object or page displays every group.

 **Note:** Actions on list view items reflect only the predefined set of actions for that object. For example, let’s say you’re viewing the All Accounts list in the Salesforce mobile app. If you swipe left on an account item in the list, you see a set of actions. Those actions come from the predefined list of actions for accounts in this chart. You always see Call, Edit, and Delete. The other actions on the list view item follow the order and rules defined for the action groups in the chart.

Here’s the breakdown of which actions are contained in each group for each object or page.

Object or Page	Action Group 1	Action Group 2	Action Group 3	Action Group 4	Action Group 5	Action Group 6
Account	1. Call, 2. New Task, 3. New Event, 4. Post	5. Edit	Remaining quick actions from the Quick Actions in the Salesforce Classic Publisher	Custom buttons that are supported in the Salesforce mobile app, in the order defined on	Remaining standard buttons that are supported in the Salesforce mobile app, in the order defined on	Send Text (if the Phone field is populated) View Website (if the Website field is populated)

Object or Page	Action Group 1	Action Group 2	Action Group 3	Action Group 4	Action Group 5	Action Group 6
			section. If that section isn't customized, remaining quick actions are inherited from the Quick Actions in the Salesforce Classic Publisher section of the <i>global publisher layout</i> .	the page layout.*	the page layout.	
Case	Actions from the Quick Actions in the Salesforce Classic Publisher section. If that section isn't customized, quick actions are inherited from the Quick Actions in the Salesforce	Edit		Custom buttons that are supported in the Salesforce mobile app, in the order defined on the page layout.*	Remaining standard buttons that are supported in the Salesforce mobile app, in the order defined on the page layout.	

Object or Page	Action Group 1	Action Group 2	Action Group 3	Action Group 4	Action Group 5	Action Group 6
	Classic Publisher section of the <i>global publisher layout</i> .					
Contact	1. Call, 2. Send Email, 3. New Task, 4. New Event	5. Edit	Remaining quick actions from the Quick Actions in the Salesforce Classic Publisher section. If that section isn't customized, remaining quick actions are inherited from the Quick Actions in the Salesforce Classic Publisher section of the <i>global publisher layout</i> .	Custom buttons that are supported in the Salesforce mobile app, in the order defined on the page layout.	Remaining standard buttons that are supported in the Salesforce mobile app, in the order defined on the page layout.	Send Text
Custom Object	First four actions in the order	5. Edit	Remaining quick actions from the	Custom buttons that are	Remaining standard buttons that	

Object or Page	Action Group 1	Action Group 2	Action Group 3	Action Group 4	Action Group 5	Action Group 6
	defined on the page layout. If the Quick Actions in the Salesforce Classic Publisher section isn't customized, then the first four actions in the order defined on the <i>global publisher layout</i> .		Quick Actions in the Salesforce Classic Publisher section. If that section isn't customized, remaining quick actions are inherited from the Quick Actions in the Salesforce Classic Publisher section of the <i>global publisher layout</i> .	supported in the Salesforce mobile app, in the order defined on the page layout.*	are supported in the Salesforce mobile app, in the order defined on the page layout.	
Event	Quick actions in the order defined on the layout. Standard Chatter actions aren't supported.	Edit, Delete				
Feed	Quick actions in the order defined on the global					

Object or Page	Action Group 1	Action Group 2	Action Group 3	Action Group 4	Action Group 5	Action Group 6
	publisher layout					
Group	Actions from the Quick Actions in the Salesforce Classic Publisher section. If that section isn't customized, quick actions are inherited from the Quick Actions in the Salesforce Classic Publisher section of the <i>global publisher layout</i> .				Remaining standard buttons that are supported in the Salesforce mobile app, in the order defined on the page layout.	
Lead	1. Log a Call, 2. New Task, 3. Convert (if enabled), 4. Post	5. Edit	Remaining quick actions from the Quick Actions in the Salesforce Classic Publisher	Custom buttons that are supported in the Salesforce mobile app, in the order defined on	Remaining standard buttons that are supported in the Salesforce mobile app, in the order defined on	Call, Send Text, Send Email

Object or Page	Action Group 1	Action Group 2	Action Group 3	Action Group 4	Action Group 5	Action Group 6
			section. If that section isn't customized, remaining quick actions are inherited from the Quick Actions in the Salesforce Classic Publisher section of the <i>global publisher layout</i> .	the page layout.*	the page layout.	
"App Page" Lightning page	Global actions in the order defined in the Lightning page					
List View	New					
Object Home Page (Tablet Only)	1. New, 2. Sort					
Opportunity	1. Log a Call, 2. New Task, 3. New Event, 4. Post	5. Edit	Remaining quick actions from the Quick Actions in	Custom buttons that are supported in the	Remaining standard buttons that are supported in	

Object or Page	Action Group 1	Action Group 2	Action Group 3	Action Group 4	Action Group 5	Action Group 6
			the Salesforce Classic Publisher section. If that section isn't customized, remaining quick actions are inherited from the Quick Actions in the Salesforce Classic Publisher section of the <i>global publisher layout</i> .	Salesforce mobile app, in the order defined on the page layout.	the Salesforce mobile app, in the order defined on the page layout.	
People	1. Call, 2. Send Email, 3. Post		Remaining actions in the order defined on the global publisher layout			
Person Account	1. Call, 2. Send Email, 3. New Task, 4. New Event	5. Edit	Remaining quick actions from the Quick Actions in the Salesforce	Custom buttons that are supported in the Salesforce mobile app,	Remaining standard buttons that are supported in the Salesforce	Read News, Send Text, View Website

Object or Page	Action Group 1	Action Group 2	Action Group 3	Action Group 4	Action Group 5	Action Group 6
			Classic Publisher section. If that section isn't customized, remaining quick actions are inherited from the Quick Actions in the Salesforce Classic Publisher section of the <i>global publisher layout</i> .	in the order defined on the page layout.*	mobile app, in the order defined on the page layout.	
Related List (for standard objects)	1. New					
Salesforce Today—Main Page	Quick actions in the order defined on the global publisher layout					
Salesforce Today—Mobile Calendar Event	1. Quick Message, 2. Join Conference Call, 3. Map		Remaining quick actions from the Quick Actions in the			

Object or Page	Action Group 1	Action Group 2	Action Group 3	Action Group 4	Action Group 5	Action Group 6
			Salesforce Classic Publisher section. If that section isn't customized, remaining quick actions are inherited from the Quick Actions in the Salesforce Classic Publisher section of the <i>global publisher layout</i> .			
Task	1. Edit Comments, 2. Change Date, 3. Change Status, 4. Change Priority	5. Edit	Remaining quick actions from the Quick Actions in the Salesforce Classic Publisher section. If that section isn't customized, remaining quick actions	Custom buttons that are supported in the Salesforce mobile app, in the order defined on the page layout.*	Remaining standard buttons that are supported in the Salesforce mobile app, in the order defined on the page layout.	

Object or Page	Action Group 1	Action Group 2	Action Group 3	Action Group 4	Action Group 5	Action Group 6
			are inherited from the Quick Actions in the Salesforce Classic Publisher section of the <i>global publisher layout</i> . Standard Chatter actions aren't supported.			

As we mentioned, some actions are in fixed positions. In places where you see a numbered list in the table, this is the fixed order that those actions appear in on the action bar, list item actions, and in the respective action menus.

For example, for the Account object, the standard Chatter Post action is in the fourth position. This is fixed. Regardless of where you put the Post action in the account page layout, Post always displays in the fourth position.

However, deletion of actions is always respected. So in our example, if you delete the Post action from the account page layout, the remaining actions move up and you see Edit in the fourth position.

* Custom buttons that are added to the Button section of a page layout and that define the content source as *URL* or *Visualforce* are supported in the Salesforce mobile app. Remember that Visualforce pages must be enabled for use in the Salesforce mobile app. Custom links, custom buttons that are added to list views, and custom buttons that define the content source as *OnClick JavaScript* aren't available in the Salesforce mobile app.

Actions with and without Chatter

Use actions regardless of whether Chatter or actions in the publisher are enabled.

The actions that are available in the full Salesforce site or in the Salesforce mobile app depend on your org’s settings. To enable or disable Chatter for your organization, from Setup, enter *Chatter Settings* in the Quick Find box, then select **Chatter Settings**. If Chatter is enabled, the *Enable Actions* in the *Publisher* option controls whether the actions that you create display in the Chatter publisher.

	Chatter Off, Actions Off	Chatter On, Actions Off	Chatter On, Actions On
You can create global actions and customize global action lists	Yes	Yes	Yes
You can create object-specific actions and customize object-specific action lists	Yes	Yes	Yes
Actions appear on the Home page and Chatter home page in the full Salesforce site	No	Yes ¹	Yes
Actions appear in object feeds in the full Salesforce site	No	Yes ^{1,2}	Yes ²
The action bar is available in the the Salesforce mobile app feed	No ³	Yes ⁴	Yes

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Quick actions available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, Database.com,** and **Developer** Editions

Custom canvas actions available in: **Professional** (with Canvas enabled), **Enterprise, Performance, Unlimited,** and **Developer** Editions

	Chatter Off, Actions Off	Chatter On, Actions Off	Chatter On, Actions On
The action bar is available on the record view in the Salesforce mobile app	Yes ⁵	Yes ⁶	Yes ⁶
The action bar is available on Lightning pages in the Salesforce mobile app	Yes ⁵	Yes	Yes

Footnotes:

- 1. If actions in the publisher aren’t enabled, only standard Chatter actions (Post, File, Link, Poll, and Thanks) appear in the Chatter publisher in the full Salesforce site.
- 2. The Chatter feed appears on an object’s detail page in the full Salesforce site only for objects that have feed tracking enabled.
- 3. When Chatter is disabled, the Feed item isn’t available in the Salesforce mobile app.
- 4. When Chatter is enabled but actions in the publisher aren’t, standard Chatter actions and nonstandard actions appear in the Salesforce mobile app action bar and in third-party apps that use action lists. Nonstandard actions include Create, Update, Log a Call, custom actions, and Mobile Smart Actions.
- 5. When Chatter and actions in the publisher are disabled, only nonstandard actions appear in the action bar in the Salesforce mobile app or in third-party apps that use action lists. Nonstandard actions include Create, Update, Log a Call, custom actions, and Mobile Smart Actions.
- 6. If feed tracking isn’t enabled on an object, only nonstandard actions appear in the Salesforce mobile app action bar and in third-party apps that use action lists. Nonstandard actions include Create, Update, Log a Call, custom actions, and Mobile Smart Actions.

Salesforce App Features: What’s Available in Each Version

Salesforce is available on Android and iOS devices from Google Play and the App Store. It’s also available as a mobile web experience in supported mobile browsers. In most cases, all of the “flavors” include the same features. But there are some differences between the experiences, often related to differences in the mobile platforms on which Salesforce is supported.

Feature	Salesforce for Android	Salesforce for iOS	Mobile Web
Navigation and Actions			
Access up to 200 list views per object	✓	✓	✓
See visual snapshots of business data on list view charts			✓ (tablets only)
Sort and filter list views	✓	✓	✓
Do actions like make phone calls, log calls, and send emails <i>(Phone calls supported on iPhones and Android phones only)</i>	✓	✓	✓
Use quick actions created for your organization	✓	✓	✓
See Google Maps images in standard address fields	✓	✓	✓
Search			
Search for Salesforce records	✓	✓	✓
Scope global searches to find records by object			✓
See matching search results for all records, not just those that have been recently viewed			✓
Sort search results			✓
Get more relevant results with dependent lookup filters	✓	✓	✓
Get automatic spell checking and correction on search keywords	✓	✓	✓
Use global search to find Chatter posts in the “All Company” feed			✓
Use Spotlight Search to find Salesforce data without opening Salesforce		✓	
Relationship and Data Management			

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Feature	Salesforce for Android	Salesforce for iOS	Mobile Web
Add new records and update existing records	✓	✓	✓
Prevent the creation of duplicate records	✓	✓	✓
Stay up to date about important companies and industries with News	✓	✓	✓
See company logos for accounts	✓	✓	✓
Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads	✓	✓	✓
Track relationships between accounts and contacts with Contacts to Multiple Accounts	✓	✓	✓
Add contacts to Salesforce from mobile device contact lists	✓	✓	
See lead scores	✓	✓	✓
Convert qualified leads to contacts	✓	✓	✓
Use Path on opportunities to follow sales processes and get deals closed	✓	✓	✓
Work with account teams and opportunity teams	✓	✓	✓
Add products, quotes, and multiple influential campaigns to opportunities	✓	✓	✓
Manage campaign member statuses	✓	✓	✓
View forecast data		✓	
Work with data stored outside of Salesforce	✓	✓	✓
Productivity (Salesforce Today, Notes, Events, Tasks, Email)			
Use Today to prepare for and manage the day's events, join conference calls, and log mobile calendar events in Salesforce	✓	✓	
Add contacts to Salesforce from events in Today	✓	✓	

Feature	Salesforce for Android	Salesforce for iOS	Mobile Web
Take rich text meeting notes and easily relate them to records	✓	✓	✓
Add images to notes		✓	
Create tasks from Notes	✓	✓	✓
Create tasks from Chatter posts			✓
Create recurring and follow-up tasks	✓	✓	✓
Track, close, or reopen tasks	✓	✓	✓
Do quick task updates with a tap: edit comments or change a due date, status, or priority	✓	✓	✓
Create and view Salesforce events	✓	✓	✓
Send email from Salesforce using SalesforceIQ Inbox	✓	✓	
Work.com			
Use Work.com Coaching, Goals, Rewards, and Skills <i>(Skills available in Android only)</i>	✓	✓	✓
Customer Service Tools			
Work with cases and case emails	✓	✓	✓
Use Social Customer Service to track cases and respond to Twitter Tweets in real time	✓	✓	✓
View Salesforce Knowledge articles	✓	✓	✓
Track purchased products with Assets	✓	✓	✓
Streamline field service with Work Orders (including milestones, linked articles, and work order hierarchies)	✓	✓	✓
View scheduled services and navigate to service locations with Field Service Lightning	✓	✓	✓

Feature	Salesforce for Android	Salesforce for iOS	Mobile Web
Reports and Dashboards			
View dashboards, dashboard components (including Visualforce dashboard components), and reports	✓	✓	✓
View Lightning Experience reports, dashboards, and charts	✓	✓	✓
Sort data in reports	✓	✓	✓
Apply dashboard filters	✓	✓	✓
Share snapshots of Enhanced Charts in the Chatter feed			✓
Salesforce Files			
Use Salesforce Files	✓	✓	✓
Use Salesforce Files if Chatter is turned off			✓
Browse and share files from external data sources, such as SharePoint, OneDrive for Business, Google Drive, and Box (<i>Requires Files Connect</i>)	✓	✓	✓
Edit Microsoft Office 365 files	✓	✓	
Access Content Libraries		✓	
Chatter (Feeds, Topics, Profiles, Groups)			
Use Chatter feeds, people, and groups	✓	✓	✓
Search in the main Chatter feed	✓	✓	✓
Mute Chatter posts			✓
View, edit, and follow feed entries organized by topic; add multiple topics to posts			✓
Bundle multiple record updates into a single post			✓

Feature	Salesforce for Android	Salesforce for iOS	Mobile Web
Attach photos or files to posts or comments, or use quick actions to post photos or files	✓	✓	✓
Share Chatter posts	✓	✓	
See previews of files posted to posts and comments	✓	✓	✓
Double-tap to add or remove bookmarks for Chatter posts		✓	
Ask questions and get answers in the feed			✓
Escalate questions in Chatter to cases			✓
Edit user profile details	✓		✓
Change the user profile picture	✓	✓	✓
Add group photos	✓	✓	✓
Add records to groups	✓	✓	✓
Collaborate with more privacy in unlisted Chatter groups	✓	✓	✓
Post announcements in group feeds	✓	✓	✓
Manage groups, including add group members	✓	✓	✓
Use Salesforce if Chatter is turned off	✓	✓	✓
Use quick actions in Salesforce if Chatter is turned off	✓	✓	✓
Launch Salesforce from Chatter email notifications and digest links	✓	✓	✓
Salesforce Communities			
Access communities created using the Salesforce Tabs + Visualforce template	✓	✓	✓
Business Logic and Process Automation			

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Feature	Salesforce for Android	Salesforce for iOS	Mobile Web
Submit records for approval	✓	✓	✓
View the status of pending approvals and approve or reject approval requests		✓	✓
Resume or delete paused flow interviews	✓	✓	✓
Notifications			
Receive in-app notifications	✓	✓	✓
Receive push notifications	✓	✓	
Configure the push notifications that are sent	✓	✓	
Offline			
View cached data when working offline	✓	✓	
Create, edit, and delete records for recently accessed objects when offline (Beta)	✓	✓	
Access and Security			
Log in faster using password manager apps right from the Salesforce login page		✓	
Configure connections to multiple instances from the login page	✓	✓	
Switch between multiple Salesforce accounts or communities without leaving the app	✓	✓	
Open most Salesforce URLs directly in Salesforce	✓	✓	
Control app access with a security passcode	✓	✓	
Use Connected App security settings to meet industry compliance regulations	✓	✓	
Get enhanced security with Mobile Device Management (MDM)	✓	✓	
Customizations and User/App Settings			

Feature	Salesforce for Android	Salesforce for iOS	Mobile Web
View Visualforce pages	✓	✓	✓
Access Lightning pages, and custom and third-party apps	✓	✓	✓
See a customized selection and arrangement of actions in the action bar and list item actions	✓	✓	✓
See custom branding	✓	✓	✓
See field-level help	✓	✓	✓

Salesforce Editions and Licenses

See which Salesforce editions and user license types support using the Salesforce app.

Salesforce Editions

Salesforce is available in these editions:

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

But not in these editions:

- Database.com Edition

User License Types

These user license types can access the Salesforce app. A special mobile license isn't required.

- Salesforce users

These user license types don't have access to the mobile app:

- Portal users (unless a member of a Salesforce community)

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

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