

Salesforce1 Admin Cheatsheet

salesforce

Overview

Salesforce1 is a mobile app development platform for everyone. It allows users to be highly productive in micro moments whenever, and wherever, they occur. Salesforce1 gives developers, administrators, and every user powerful tools and the freedom to innovate. Designed for scale with extensibility and integration, there's no limit to what you can build.

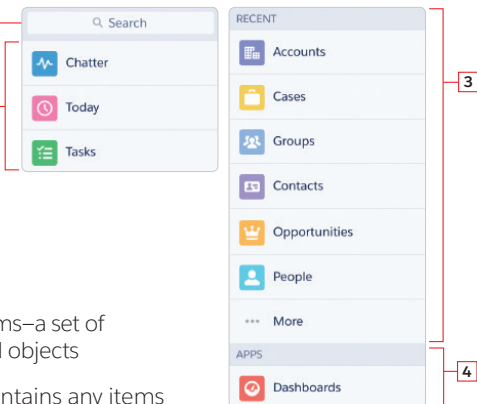
Mobile App Access

The Salesforce1 mobile app is automatically enabled for all organizations. To use the app, either install the mobile app or enable the mobile browser app in Salesforce.

- Install the mobile app – You can download and install Salesforce1 from Google Play or the App Store.
- Use the mobile browser – In Setup enter Salesforce1 in the Quick Find box, then click **Salesforce1 Settings**. Then enable the **Salesforce mobile browser app**. When your users log in to Salesforce, they will be redirected to the mobile browser version of the app.

Navigation Menu

Anywhere users see the ☰ icon in Salesforce1, they can tap it to access the navigation menu. As an administrator, you can customize what the menu contains.

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—a set of recently-searched objects
 4. Apps section—contains any items you place below the Smart Search Items element
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To customize the navigation menu:

1. From Setup, enter Navigation in the Quick Find box, then select **Salesforce1 Navigation**.
2. Some items are automatically added to the menu. You'll also see mobile-enabled Visualforce pages and Flexible Page tabs in the Available list.
3. The order you put items in the selected list is the order that they display in the navigation menu. Also, the first item you put in the list becomes your users' Salesforce1 landing page.
4. Use the Up or Down arrows to rearrange the tab ordering.
5. Click **Save**.

Smart Search

Search Results

Search Feeds

Records

Contacts (0) ✖
Opportunities (0) ✖
Accounts (0) ✖
Groups (0) ✖
Account Plans (0)
Activities (0)

The Smart Search Items will automatically begin to filter to the tabs that the logged in user searches for most. Individuals can also manually force tabs to surface at the top of this list by pinning them in their org.

To pin a tab:

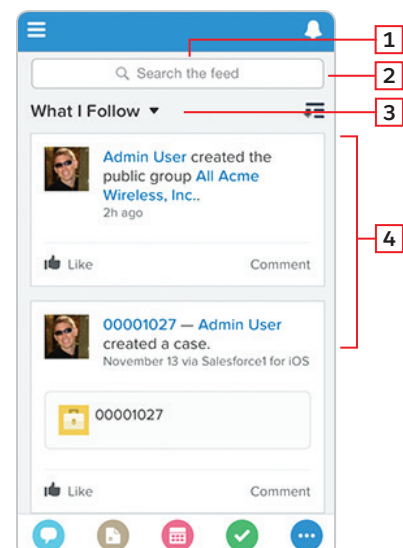
1. Navigate to the global search results page by clicking **Search** at the top of the screen.
2. On the search results page, hover on the object you want to pin in the sidebar and click the pin icon.

Note: You can only pin objects that have tabs.

The Feed

The 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 as well as the sort and filter options.

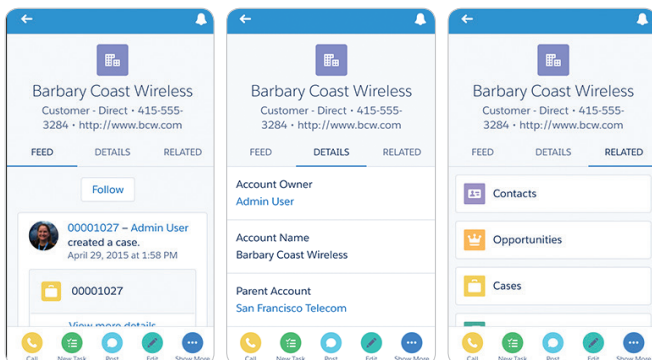
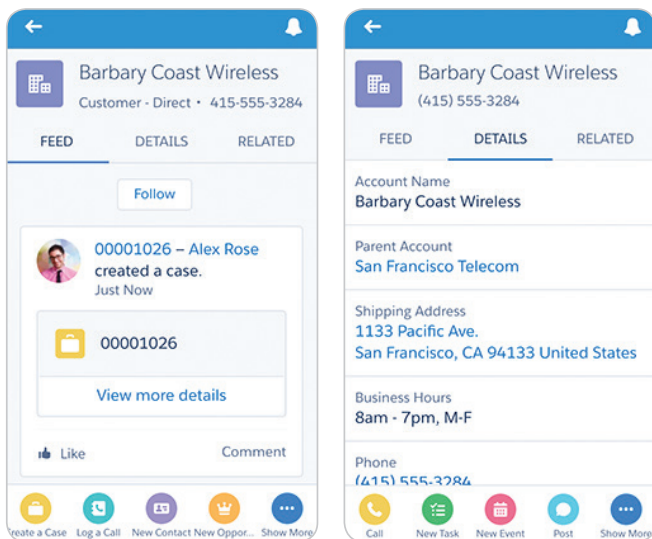
1. Search bar
2. Sort and filter options
3. Feeds drop-down menu
4. Feed item



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The Record View

You can use the enhanced page layout editor in the full Salesforce site to customize the layout of an object's record detail pages and adjust which fields and related lists appear. 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.



In Salesforce1, page layouts drive these areas of the mobile experience:

Record Related Information and Detail Pages

When you view a record in Salesforce1, 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** and mobile-enabled Visualforce pages to the Mobile Cards section of your page layout to have them show up as mobile cards in Salesforce1. The elements you place in this section don't show up on a record's detail page in the full Salesforce site. They only appear on the record's related information page in Salesforce1.

Actions

In Salesforce1, actions you configure on the page layout show up in the action bar.

Page Layout Assignment

To assign a mobile page layout to a user's profile, navigate to Page Layout Assignment.

- For standard objects, click **Customize > Account > Page Layouts** and then click **Page Layout Assignment**.
- For custom objects, open the object's detail page, go to the Page Layouts related list, and click **Page Layout Assignment**.
 - Click **Edit Assignment**.
 - Click the **Page Layout to Use** drop-down list.
 - Select the **Profile** you want to use and then **Save**.

Account Page Layout

Help for this Page ?

This page allows you to create different page layouts to display Account data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

| Account Page Layouts | | New Page Layout Assignment | |
|----------------------|-----------------------|--------------------------------|---------------------------------|
| Action | Page Layout Name | Created By | Modified By |
| Edit Del | Account Layout | Mario Korf, 10/23/2013 4:40 PM | Mario Korf, 10/23/2013 4:40 PM |
| Edit Del | Account Mobile Layout | Mario Korf, 10/24/2013 8:31 AM | Mario Korf, 10/25/2013 11:47 AM |

Displaying Visualforce Pages

To enable Visualforce pages for the Salesforce1 mobile app, edit the page in Setup and select **Available for Salesforce mobile apps and Lightning Pages**.

The standard Visualforce tag library is optimized for desktop browsers, and doesn't always provide a good mobile experience. In fact, some Visualforce components are not supported on a mobile device.

Before you enable Visualforce pages for mobile users, test the pages in a mobile browser or emulator to see how they look and behave on a mobile device.

Note that you can't hack the URL using the standard `https://<Salesforce_instance>/apex/yourPageName` to open the Visualforce page in Salesforce1.

You must view the pages by accessing the page within either the browser, emulator or the Salesforce1 app.

Compact Layouts

Salesforce1 uses compact layouts to display a record's key fields at a glance. Compact layouts are designed for viewing records on mobile devices, where space is limited and quick recognition of records is important.



1. Back arrow—returns the user to the previous page
2. Record highlights

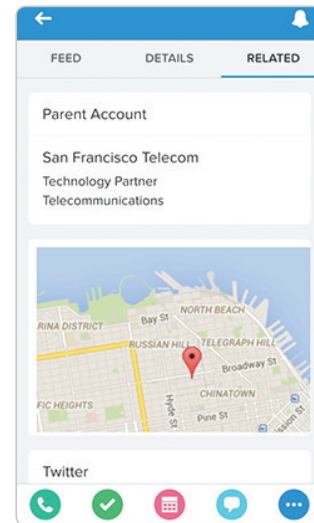
In the full Salesforce site, compact layouts determine which fields appear in the Chatter feed item that appears after a user creates a record with a quick action.

1. In Setup, go to the management settings for the appropriate object, then click **Compact Layouts**.
2. Click **New**.
3. In the Label field, enter a name for your compact layout.
4. Select the fields you want to display for the compact layout, then click **Add**.
5. Use the Up or Down buttons to adjust the list order.
6. Click **Save**.
7. Set this compact layout as the primary. Click **Compact Layout Assignment**.
8. Click **Edit Assignment**.
9. Select the compact layout you just created to use as the primary compact layout.
10. Click **Save**.

Related Information Page and Mobile Cards

Swipe left from the detail page of a record to display the related information page.

The related information page for an account, for example, might contain Activities, Cases, and Contacts related to the account. You can add more information to the related information page by creating mobile cards.



In the Mobile Cards section of the page layout editor, you can display Visualforce pages or related lookups. Only Visualforce pages enabled for Salesforce mobile apps will display in Salesforce1.

1. In Setup, go to the management settings for the appropriate object, then click **Page Layouts**.
2. Click **New** or select the page layout you want to add a mobile card to.

Mobile Cards: Visualforce

Mobile-enabled Visualforce pages show up as slightly different-colored elements in the palette than their non-mobile-enabled counterparts.

Click the **Visualforce Pages** category and drag your mobile-enabled Visualforce pages into the Mobile Cards section.

Mobile Cards: Related Lookups

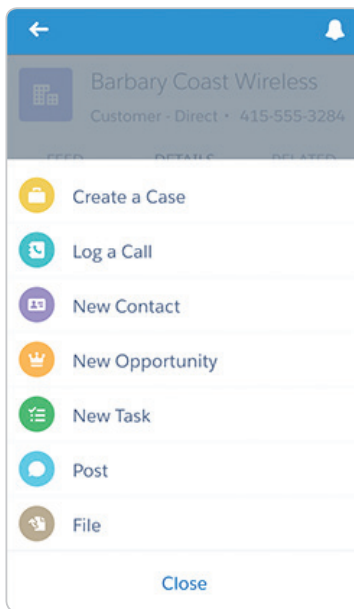
The Expanded Lookups category in the page layout editor contains fields with lookup relationships. These fields, when added to the Mobile Cards section of the layout, display as related lookup cards on a record's related information page in Salesforce1.

Click the **Expanded Lookups** category and drag lookup fields into the Mobile Cards section.

Actions

Users see different actions depending on which feed or record page a user is viewing. From the feed they see a set of global actions. From a record page, they see a mix of standard actions—such as Post and File—and object-specific actions assigned to the layout for that record type. Once in the action bar, users can tap any action to open it.

Actions can be added to the Chatter publisher on the home page, on the Chatter tab, in Chatter groups, and on record detail pages.



- Question actions enable users to ask and search for questions about the records that they're working with.
- Send Email actions, available only on cases, give users access to a simplified version of the Case Feed Email action.
- Create actions let users create records. They're different from the Quick Create and Create New features on the home page, because create actions respect validation rules and field requiredness, and you can choose each action's fields.
- Log-a-call actions let users record the details of phone calls or other customer interactions. These call logs are saved as completed tasks.
- Update actions let users make changes to a record from the record's feed or from the publisher.

Developers can create another type of action: a custom action. Custom actions invoke Visualforce pages, Lightning components, or canvas apps with functionality you define.

Global Actions

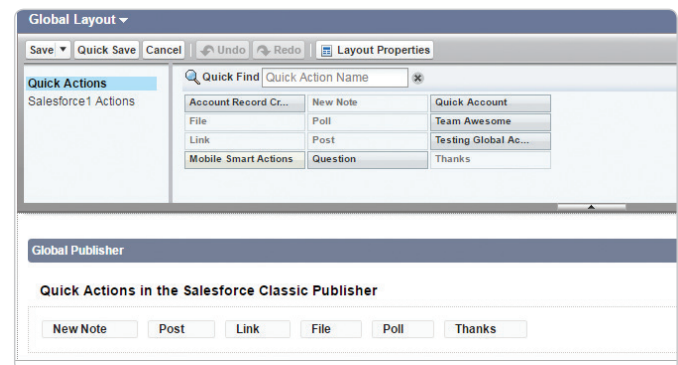
Global create actions let users create object records, but there's no automatic relationship between the record that's created and any other record. You can add global actions to page layouts for the home page, the Chatter tab, Chatter groups, and record detail pages.

You create global actions in a different place in Setup than you create object-oriented actions. To create a global action, in Setup, click **Create > Global Actions**.

Global Publisher Layout

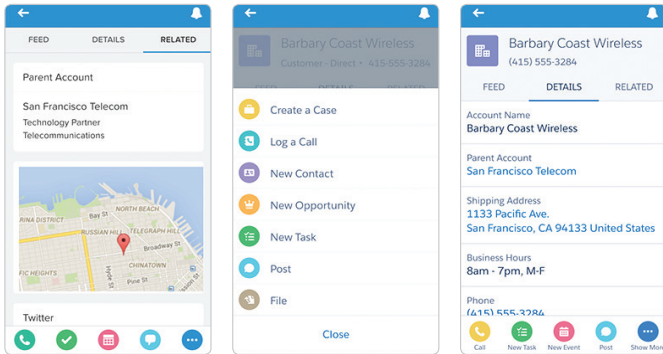
Global publisher layouts let you customize actions that appear on Chatter publishers for global pages such as the Home page, Chatter page, and Chatter group detail pages. Global publisher layouts can be composed only from global actions. After creating global publisher layouts, you can assign them to different user profiles, which lets you customize which actions the users under different profiles see by default in their Chatter feeds on the global pages.

In Salesforce1, global actions show up in the action bar on pages to which the global publisher layout applies. To add an action to the global publisher layout, in Setup, enter Global in the Quick Find box, click **Publisher Layouts**, and edit the Global Layout.



Object-Specific Actions

Object-specific create actions let users create records that are automatically associated with related records. For example, you might set up an object-specific action on the Account object to allow users to create contacts. If a user creates a contact on the detail page for Acme, Inc., that contact will automatically be associated with Acme. You can only add an object-specific action to page layouts for that object.



1. To add an action to a custom object, in Setup, go to **Create > Objects**, then click a custom object name.
2. Scroll down to the Buttons, Links, and Actions related list.
3. Click **New Action**.
4. Select Action Type (for example, select **Create a Record**).
5. Select a target object.
6. Give the action a label.
7. Click **Save**.

After saving, you're dropped directly into the action layout editor, where you can customize the fields assigned to the action. Define the layout with the appropriate fields and save. Before your object-specific action will show up both in the full Salesforce site and in Salesforce1, you need to add it to a page layout.

1. To add an action to a custom object's page layout, go to the object's **Page Layouts** related list and **Edit** the layout you want to add the action to.
2. If you haven't customized actions on the object yet, then in the **Salesforce1 and Lightning Experience Actions** section, click to override the global publisher layout. Default actions appear.
3. Click the **Salesforce1 & Lightning Actions** category in the palette, then drag the action you created into the **Salesforce1 and Lightning Experience Actions** section. The first four actions in the list show up in the action bar in Salesforce1.
4. Click **Save**.

This action will now show up on the object detail page in the full Salesforce site, and in the action bar in Salesforce1.

Notifications

Notifications in Salesforce1 let your users know when certain events occur in Salesforce, such as when they receive approval requests or are mentioned in Chatter or on a record.

Note: Enabling notifications is an all-or-nothing process. Either they're on for everyone, or off for everyone.

In-app notifications

In-app notifications keep users aware of relevant activity when they're using Salesforce1. Users can access their 20 most recent notifications by tapping . 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 the Salesforce1 downloadable app, but isn't using it. These alerts can consist of text, icons, and sounds, depending on the device type. Users can choose whether to receive push notifications; however, they can't enable push notifications if disabled by an administrator. Push notifications aren't supported in the Salesforce1 mobile browser app.

| Notification Type | In-App Notification | Push Notification |
|----------------------------------|---------------------|-------------------|
| You received an approval request | X | X |
| Someone mentioned you | X | X |
| Someone posted to your profile | X | |
| Someone commented on your post | X | |

To Enable:

1. From Setup, enter Salesforce1 in the Quick Find box, then click **Salesforce1 Notifications**.
2. If they're not already selected, select both **Enable in-app notifications** and **Enable push notifications**.



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