
Salesforce Classic User Guide for Android

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CHAPTER 1 What's Salesforce Classic Mobile?

Salesforce Classic Mobile gives you mobile access to your Salesforce data, tasks, and calendar, and integrates the data with your mail and phone. With Salesforce Classic Mobile installed on your Android device, you can stay connected to your data when you're not sitting at your desk and even when your device isn't connected to a Wi-Fi network.

Salesforce Classic Mobile downloads relevant data for standard Salesforce objects—such as accounts, contacts, opportunities, tasks, events, and leads—and custom objects. You can view, edit, and delete the records stored on your device, or create new records. You can also search online for specific Salesforce records and add them to your device.

Your Salesforce Classic Mobile data is defined by a mobile configuration created by your administrator, who identifies which objects, records, and specific fields are relevant to your daily work needs. This allows a subset of all your Salesforce data to be delivered to your device. Remember, you can also search for and retrieve individual records that aren't automatically downloaded to your device.

About This Guide

This guide is a reference for Salesforce users who want to access their data from an Android device. Before reading this guide, you should be familiar with your device. Specifically you should know how to use the touch screen and onscreen keyboard, scroll through lists, navigate to previous lists, and surf the Web.

Salesforce Classic Mobile Requirements

Requirements for...	Include...
Salesforce	An active Salesforce account with a mobile license to access the mobile application on your Android device. If you aren't already a customer, visit the Salesforce website to sign up for a free trial. If you aren't sure whether you have a Salesforce account, contact your organization's system administrator.
Android Device	Android OS 2.2 and newer. Be sure your device has at least 10 MB of available space before installing the mobile client application.
Wireless Network	A cellular or Wi-Fi network to communicate with Salesforce; however, you can continue working on your local data even when you lose connectivity to the Internet.

Android Disclaimer

Use of the Salesforce Classic Mobile for Android product is subject to these limitations.

- Third parties (including, but not limited to, Google and your network connectivity provider) may at any time restrict, interrupt, or prevent use of Salesforce Classic Mobile for Android devices, or delete the Salesforce Classic Mobile software from Android devices, or require Salesforce to do any of the foregoing, without entitling the customer to any refund, credit, or other compensation from such third party or Salesforce.

- Service-level agreements don't apply to the Salesforce Classic Mobile for Android product. Additional limitations are described in the Order Form Supplement for Salesforce Classic Mobile for Android, which users are required to accept upon download or installation of the Salesforce Classic Mobile for Android product.

CHAPTER 2 Getting Started

To get started with Salesforce Classic Mobile, you first need to download the application from Google Play. Then you can activate your Salesforce account on your Android device and begin using the mobile application. Before you start working with Salesforce on your device, you should understand how to navigate Salesforce Classic Mobile.

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Installing Salesforce Classic Mobile

Salesforce Classic Mobile is available for download from Google Play. To access Google Play, your Android device must be connected to the network. You also need a Google account to download applications. If you don't already have a Google account, go to <https://accounts.google.com> and select **Sign up**.

To download Salesforce Classic Mobile from Google Play:

1. From the Apps screen of your Android device, select the Google Play Store.
2. Select the **Search** field, and type *salesforce*.
3. Select Salesforce Classic Mobile from the search results.
4. Select **Download**.
5. Tap **Accept and Download** if you agree to the terms.
6. Select **Open** to launch the application.
7. The first time you launch the Salesforce Classic Mobile app on your device, you must activate the app for your device by logging in and downloading data. Verify that your phone is connected to a network.
 - a. Select **I Accept**.
 - b. On the activation screen, enter your Salesforce username and password.
 - c. Select **Activate**.

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

Setting Your Passcode

For security, your Salesforce Classic Mobile session times out after ten minutes of inactivity. You must use a five-digit passcode, which is different than your Salesforce password, to access the mobile application after it locks. Salesforce Classic Mobile prompts you to set up this passcode when you log in for the first time.

 **Note:** The default timeout setting is five minutes. Your administrator can change the timeout setting to a different time interval or remove it so that the application never locks.

To set up your passcode:

1. Install Salesforce Classic Mobile.

After your Salesforce records download to your device, you are prompted to create your passcode.

2. Enter your five-digit passcode.
3. Enter your passcode again for confirmation.

Notes about Passcodes

- Your passcode never expires. If you or your administrator choose to erase the Salesforce data on your device, you'll be prompted to create a new passcode after re-activating your Salesforce Classic Mobile account.
- If you incorrectly type your passcode, you have ten attempts to enter the correct passcode before you're prompted to change it.
- There's no way to reset your passcode. If you forget it, enter an incorrect passcode ten times until you fail the passcode attempts. Then, reactivate your account and create a new passcode.
- You can log out of the application by navigating to the Application Info screen and tapping **Lock**.

Understanding the Mobile Data on Your Device

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

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Mobile Objects

Salesforce Classic Mobile provides access to custom objects and the following standard objects:

- Accounts
- Assets
- Attachments
- Cases
- Contacts
- Content
- Events
- Leads
- Notes

- Opportunities
- Price Books
- Products
- Solutions
- Tasks

Mobile Records

It's likely that you don't see all of your Salesforce records in Salesforce Classic Mobile. For each mobilized object, your administrator can create filter criteria to limit the amount of records on your device. For example, in a large organization, sending all open and closed opportunities to your Android device could consume too much memory, or potentially crash the device. Instead of sending all opportunities, your administrator might send only your open opportunities that are scheduled to close this month. Keep in mind that you can always search for the records that are not automatically downloaded to your device.

Periodically, your device syncs with Salesforce to download new and updated records.

Navigating Salesforce Classic Mobile

If you're familiar with other Android applications, you'll find it easy to navigate in Salesforce Classic Mobile. Here are guidelines for getting around in Salesforce Classic Mobile.

- Tap the Salesforce icon to open Salesforce Classic Mobile. Tap  at any time to hide it and return to the Home screen. Salesforce Classic Mobile remembers the last page you visited and returns to that page the next time you open Salesforce Classic Mobile.
- Generally, most Salesforce Classic Mobile pages contain lists of information. To scroll through lists, drag up and down. Flick to scroll quickly.
- Tap an item in the list to choose it. Depending on the list, tapping an item can do different things—for example, it may open a new list or show the details of a Salesforce record.
- Some lists have standard and custom views, which can change to display different list of records.
- To log out of Salesforce Classic Mobile, go to the **Application Info** screen and tap **Lock**.

Selecting Views

Some standard and custom views are available in Salesforce Classic Mobile through the Android action bar. For each mobilized object, you can select any mobile custom views that your administrator set up in Salesforce and pushed to your device. You can also view a list of all the records on your device, or just the records you own. The following objects have additional standard views:

- **Cases:** All Cases, My Cases, My Open Cases
- **Events:** All Events, My Delegated Events, My Events
- **Tasks:** All Tasks, My Open Tasks, My Tasks
- **Opportunities:** All Opportunities, Closing Next Month, Closing This Month, My Open Opportunities, My Opportunities

To change the view:

1. Select an object to open its list view.
2. Tap the name of the object in the action bar to open a list of available views for that object. For example, tap **My Accounts** to open a list of standard and custom views for accounts.
3. Tap the name of a view to select it.

The application remembers the view you chose and displays it the next time you select that object.



Tip: Standard views are also available in related lists.

CHAPTER 3 Working with Records

With Salesforce Classic Mobile, you can view, edit, and delete the Salesforce records stored on your device, as well as create new records. An online search feature is available for finding records not stored in your local data set. Because Salesforce Classic Mobile is integrated with several of the native applications on your phone, you can even place calls, send emails, and map addresses from your Salesforce records.

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Managing Records

Salesforce Classic Mobile presents objects as tiles on the home screen. Selecting an object's tile displays a list of all mobilized records for the object. For example, tapping the Accounts tile opens a list of accounts. You can perform many different actions on records in the list view.

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- [Viewing Related Items](#)
- [Editing Records](#)
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Viewing Records

1. Select an object to open the list view.
2. Tap the record name.

When you open a record, an action bar appears at the top of the detail page. The action bar displays a set of actions you can take on the current record.



Note: The action bar actions are not available if you have read-only access to the selected record.

Viewing Related Items

1. Select an object to open the list view.

2. Tap the record name.
3. Scroll to the bottom of the page and tap one of the related lists.

The mobile application gives you access to a subset of your Salesforce records, so it's possible that the related item you want to view doesn't appear in the related list. Tap **Search Server** to search online for additional related items. In the Search Results view, tap a record to open it. After opening the record, it's automatically downloaded to your device.

After searching for records on a related list, the Search Results view is active. Tap the name of the Search Results view to open a list and select a different view.

Editing Records

1. Select an object to open the list view.
2. Tap the record name.
3. Tap  in the action bar.
4. Tap the field you want to edit and change the value.

If you do not have permission to edit a field, it's hidden from the layout of the edit page.

5. Tap **Save** when done.

Creating Records

1. Select an object to open the list view, then tap **+**.
2. Enter the information in the record. Tap a field to type or select the value.
3. Tap **Save**.

Deleting Records

1. Select an object to open the list view.
2. Tap the record name.
3. Tap .
4. Tap **Delete**.



Warning: Deleting a record in Salesforce Classic Mobile also deletes the record in Salesforce.

Reassigning Records

1. Select an object to open the list view.
2. Tap the record name.

You can only reassign records that contain a `Record Owner` field.

3. Tap .
4. Tap **Change Owner**.

5. Tap the name of the user to whom you want to assign the record.

6. Tap **Save**.

If you don't have permission to reassign the record, Salesforce rejects your changes after you save the record.

Cloning Records

The **Clone** button quickly creates a new record with the same information as the existing record.

1. Select an object to open the list view.

2. Tap the record name.

3. Tap .

4. Tap a field you want to edit. Change the value, then tap **Done** to return to the record.

If you don't have permission to edit a field, it's hidden from the layout of the edit page.

5. Tap **Save**.

Searching

The easiest way to find records on your device is to search for them. Salesforce Classic Mobile syncs only a subset of your records. If you don't find a record on your device, you can continue your search online to retrieve items from Salesforce.

1. Tap **Search** on the home screen.

To search a single object, use the search box on the relevant tab. For example, search for accounts from the Accounts screen.

2. Type keywords in the search field, tap **Search**.

3. If you don't see the record you want, tap **Search Server**.

Search displays up to 100 items.

4. To open an item in the search results, tap the record. If the record is online instead of local, Salesforce Classic Mobile automatically downloads it to your device when you open it.

Records you retrieve through a search are flagged on the mobile server and become part of your mobile data set. You can remove these retrieved records from your device by opening the **Application Info** screen and tapping **Clear Data**.



Note: Salesforce Classic Mobile stores your most recent search results for each tab. After searching for records on a tab, the Search Results view is active. Tap the name of the Search Results view to open a list and select a custom or standard view.

Using Android Features with Salesforce Classic Mobile

Salesforce Classic Mobile integrates with several native Android applications: Mail, Phone, Maps, and Browser. You can perform several actions on Salesforce records that opens Android applications.

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Making Calls

Salesforce Classic Mobile works with the Phone application, so you can place a phone call directly from any Salesforce record that includes a phone number field.

1. Open a record that contains a phone number field, such as a contact, lead, or account.
2. Tap the phone number you want to dial.
3. When the call is complete, tap **End Call** to close the Phone application and return to the Salesforce Classic Mobile window.

Depending on your settings, you might be prompted to log the call after it ends.

Logging Calls

Depending on your settings, Salesforce Classic Mobile might prompt you to log a call after you hang up. Logging calls is an effective way to keep track of your tasks while you are away from your desk.

- If you tapped a phone number in Salesforce Classic Mobile to initiate a call, you are prompted to log the call once the call is complete. Tap **Yes**. The Salesforce settings on your device control whether you're prompted to log the call.
- Logging a call opens a new task or event so you can enter details about the call. To define whether calls are logged as tasks or events, customize your settings.
- Tap **Save** to log the completed task or event to Salesforce. You can see the activity by viewing the activity history associated with the record.

Sending Email

Salesforce Classic Mobile integrates with your device's email client, which means you can send emails from Salesforce records that contain email addresses.

1. Open a record that contains an email address, such as a contact or lead.
2. Tap an email address to open the New Message window.
3. Compose your message and tap **Send**.
4. To close the Mail application and open the mobile application, press the Home icon and then tap the Salesforce Classic Mobile icon to return to the last Salesforce page you visited.

Mapping Addresses

Salesforce Classic Mobile can help you find the location of a contact or account.

1. Verify that your device has a connection to a cellular or Wi-Fi network.
2. Open a contact or account record.
3. Tap an address to display the location in the Maps application.



Note: Only addresses in blue text are hyperlinks.

4. To close the browser and open the mobile application, press the Home icon and then tap the Salesforce Classic Mobile icon to return to the last Salesforce page you visited.

Opening Web Pages

From Salesforce Classic Mobile, you can open the Android browser by selecting a link in a URL field.

1. Open a Salesforce record that contains a URL field.
2. Tap the address of the website you want to visit to open the page in Android browser.
3. To close the browser and open Salesforce Classic Mobile, press the Home icon and then tap the Salesforce Classic Mobile icon to return to the last Salesforce page you visited.

CHAPTER 4 Working with Dashboards

Dashboards are a powerful tool in Salesforce that let you view snapshots of your data. You can access your dashboards from Salesforce Classic Mobile.

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Displaying Dashboards

Selecting the Dashboards icon displays the dashboard you most recently viewed. If this is your first visit to the Dashboards screen in Salesforce Classic Mobile, the mobile application requests the dashboard you last viewed in Salesforce. Depending on the strength of the cellular or Wi-Fi signal, it could take several minutes before the dashboard displays on the page.

To view a different dashboard, choose a dashboard from the **View Dashboard** drop-down list, and then tap **Go**. This drop-down list includes dashboards in all dashboard folders to which you have access.

You should understand that:

- Salesforce administrators enable mobile dashboards.
- Mobile dashboards display in a single column.
- Salesforce disables links to custom report details in mobile dashboards.
- Dashboards do not automatically refresh in the mobile application.
- The mobile application lets you work offline. Even without a wireless connection, you can see the last viewed dashboard, but you cannot refresh it or select a different one.

Refreshing Dashboards

Dashboards don't automatically refresh in the mobile application. The data in each dashboard is as current as the date and time displayed in the **As of** field at the top of the dashboard.

1. Tap **Refresh** on the dashboards page.
2. Wait a few minutes to give the mobile application time to receive the updated information from Salesforce. You can leave the dashboard and perform other functions in Salesforce Classic Mobile while the data refreshes.
3. Return to the dashboard and tap **Reload**.



Note: You can't use the **Refresh** button to refresh the dashboard from the Salesforce servers. You can only use the **Refresh** button to view updated data after the refresh has already been submitted.

CHAPTER 5 Managing the Application

Salesforce Classic Mobile provides tools for managing the application. You can edit the settings, perform maintenance tasks, view information about the application, and install upgrades.

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Editing Salesforce Settings

Salesforce Classic Mobile has several settings for display, sorting, and logging options.

1. From the Home screen of your Android device, tap .
2. When prompted to log calls placed from the mobile application:
 - To be prompted to log each call you place from the mobile application, tap **Log Calls**, then tap **Ask every time**.
 - To automatically log calls after placing them, tap **Log Calls**, then tap **Always**.
 - To never be prompted to log calls, tap **Log Calls**, then tap **Never**.
3. Set whether calls are logged as:
 - To automatically log calls as tasks, tap **Keep Calls As**, then tap **Tasks**.
 - To automatically log calls as events, tap **Keep Calls As**, then tap **Events**.
4. Set how to sort:
 - To sort alphabetically by first name, tap **Sort Order**, then tap **First, Last**.
 - To sort alphabetically by last name, tap **Sort Order**, then tap **Last, First**.
5. Set how to display:
 - To display alphabetically by first name, tap **Display Order**, then tap **First, Last**.
 - To display alphabetically by last name, tap **Display Order**, then tap **Last, First**.

 **Warning:** Do not change the Salesforce Classic Mobile's URL settings unless your administrator instructs to do so.
6. Tap  to return to the previous page.

Application Information

The Application Info screen in Salesforce Classic Mobile provides information about the mobile user, connection status, device, and local database of Salesforce records. You can also manage the Salesforce data on your Android device from the Application Info screen.

1. Tap **Application Info**.

2. Perform a management task.
3. When you're finished, tap  to return to the list of objects, or to leave the Application Info screen.

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Viewing Application Details

The Application Info screen displays information about Salesforce Classic Mobile. The following list describes each table of information:

- **User Information:** Lists your Salesforce username, your Salesforce user ID, and the date and time of the last data synchronization.
- **Application Information:** Displays the release and build number of the Salesforce Classic Mobile version installed on your phone.
- **Device Information:** Lists the name of your Android device, the device ID, and the name of the mobile server to which the phone is connected.
- **Transport Status:** Contains information about the transport, which transfers data between the mobile client application and Salesforce.
- **Data:** Displays all the database tables that exist on the device and shows how many records are in each table.
- **Schema:** Displays all the schema tables that exist on the device and shows how many records are in each table.

Logging Out

For security, Salesforce Classic Mobile might lock after a certain period of inactivity. By default, your session times out after five minutes, but your administrator can change the timeout value to a different interval.

To protect the sensitive data in Salesforce Classic Mobile, you can log out of the application from the Application Info screen.

1. Tap **Application Info**.
2. Tap **Lock**.

To access the application again, tap the Salesforce Classic Mobile icon and enter your passcode.



Note: If your Salesforce administrator configured your settings so that your mobile session never times out, **Lock** is not available.

Syncing Data

A subset of your Salesforce data is synced to your device. The data selected is determined by the mobile configuration assigned to you by your administrator.

Once every 24 hours, Salesforce Classic Mobile requests a full update of your data set. The filters contained in the mobile configuration are executed to rebuild the data set, and the resulting data records are sent to your device.

Additionally, Salesforce Classic Mobile checks for data changes every 20 minutes. Because only one application can run on the device at a time, Salesforce Classic Mobile cannot request data unless the application is open. When you launch the application, it performs an incremental update if a data sync has not occurred in the past 20 minutes. During this incremental update, the server retrieves any newly-created records that you own from Salesforce, and then sends that data to your device. Modifications to any records already stored on your device are also sent. If you want to manually refresh the data on your device, you can force an incremental or full update at any time.



Note: You can view the date and time of the last data synchronization on the Application Info Screen. This information also displays at the top of each list view in the mobile application.

To perform a full update:

1. Tap **Application Info**.
2. Tap **Sync Now** on the toolbar, then tap **Refresh All Data**.

To perform an incremental update:

1. Tap **Application Info**.
2. Tap **Sync Now** on the toolbar, then tap **Get Updated Records**.

Clearing Searched Records

Although the data automatically delivered to your device is defined by your administrator, you can search for and download records that do not match the filter criteria of your mobile configuration. After you search for and download a record, it is flagged on the mobile server and delivered to your device on every full data update.

1. Tap **Application Info**.
2. Tap **Clear Data** on the toolbar, then tap **Clear Searched Records**.

Clearing Recent Items

The **Recent** screen displays items you recently accessed in Salesforce Classic Mobile.

1. Tap **Application Info**.
2. Tap **Clear Data** on the toolbar, then tap **Clear Recent Items**.

Erasing Data

A device activated by a Salesforce user contains both Salesforce Classic Mobile and a set of the user's Salesforce data. You can remove the data from your device without uninstalling Salesforce Classic Mobile. You might erase the data if an administrator gave you an Android device that belonged to another user, and you need to activate your Salesforce account on the device.

1. Tap **Application Info**.
2. Tap **Clear Data** on the toolbar, then tap **Clear All and Deactivate**.

After the data is removed, the activation screen appears so you can enter your Salesforce username and password.

Sending Support Logs

To assist you with support issues, a Salesforce support representative may need to access the logs on your device. The logs help diagnose potential problems. You do not need to send your support logs unless requested by a Salesforce support representative or your administrator.

1. Tap **Application Info**.
2. Tap **Send Debug Logs**. You might need to scroll the toolbar in order to see the button. Flick your finger to the left to reveal additional toolbar buttons.

Upgrading Salesforce Classic Mobile

Whenever you access the Google Play, it checks for updates to applications you have installed. By default, Google Play also automatically checks for updates every week. When an upgrade of Salesforce Classic Mobile is available, you can install the new version from Google Play.

1. From the home screen, tap the Play Store icon.
2. Tap **Updates**.
If updates are available, the Updates screen automatically displays.
3. Tap Salesforce Classic Mobile to see more information about the upgrade.
4. Tap **Update**.
5. Tap **Accept & Download**.
6. Tap the Salesforce Classic Mobile icon to open the application.
You might be prompted to enter your Salesforce username and password.

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