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Salesforce Mobile User Guide for iPhone

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Chapter 1

Introduction to Salesforce Mobile

Salesforce Mobile gives you mobile access to your Salesforce data, tasks and calendar, and integrates the data with your mail and phone. With Salesforce Mobile installed on your iPhone®, you can stay connected to your data when you are not sitting at your desk and even when your device is not connected to a Wi-Fi network.

Salesforce Mobile downloads relevant data for standard Salesforce objects—such as accounts, contacts, opportunities, tasks, events, and leads—and for custom objects. You can view the records stored on your device and search online for specific Salesforce records.

Your Salesforce Mobile data is defined by a mobile configuration created by your administrator. He or she 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 are not automatically downloaded to your device.

About this Guide

The *Salesforce Mobile User Guide for iPhone* is a reference for Salesforce users who want to access their data from an iPhone. Before reading this guide, you should already be familiar with your iPhone. You need to know how to use the touch screen and onscreen keyboard, scroll through lists, back up to previous lists, and surf the web.

This guide includes the following information:

Chapter	Description
Introduction to Salesforce Mobile	Salesforce Mobile introduction, requirements, and additional resources.
Getting Started	The installation process, accessing the application, navigating, and viewing the connection status.
Working with Records	How to work with records on the mobile device, including managing records, viewing related items, searching, and using iPhone features with Salesforce Mobile.

Salesforce Mobile Requirements

Salesforce Mobile is a client application you download and run on the iPhone. The requirements for this product are:

- **Salesforce Requirements:** You must have an active Salesforce account to access Salesforce Mobile on your iPhone. If you are not already a customer, visit the [Salesforce website](#) to sign up for a free trial.
- **iPhone Requirements:** Salesforce Mobile requires iPhone operating system 2.0 or later. If the App Store icon is available on the home screen, you can use Salesforce Mobile on your iPhone. Be sure your iPhone has at least 10 MB of available memory before installing Salesforce Mobile.

- **Wireless Requirements:** Salesforce Mobile relies on 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.

Additional Resources

Refer to the following documentation for additional information:

- Apple Guides: Visit the [Apple website](#) to find out more about your [iPhone](#).
- [Salesforce Mobile Implementation Guide](#): Salesforce administrators should consult this valuable reference tool. It describes how to successfully implement Salesforce Mobile and deploy the mobile solution to wireless users.

Chapter 2

Getting Started

To get started with Salesforce Mobile, you first need to download the application from Apple's App Store. Then you can activate your Salesforce account on your iPhone and begin using the mobile application. Before you start working with the Salesforce on your phone, you should understand how to navigate around Salesforce Mobile and how to view information about the application.

Accessing Salesforce Mobile

The first time you launch Salesforce Mobile on your iPhone, you must activate your Salesforce account by logging in and downloading data.

1. Download Salesforce Mobile from Apple's App Store and install it. For detailed instructions, see the iPhone user guide.
2. Verify that your phone is connected to a network. For greater performance and reliability, use a Wi-Fi network instead of a cellular network when activating Salesforce Mobile.
3. Tap the Salesforce icon on the Home screen.
4. On the activation screen, enter your Salesforce username and password. Tap **Done** to close the keyboard.
5. Tap **Activate**.



Caution: Do not close the Salesforce Mobile window or let the iPhone lock during the activation process.

6. The application opens after Salesforce accepts your username and password and downloads your records.



Note: After the first time you open Salesforce Mobile, you do not need to log in again. Tapping the Salesforce icon immediately launches the application.

Navigating

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

- Tap the Salesforce icon to open the mobile application. Tap the Home button at any time to close it and return to the Home screen. The application remembers the last page you visited and returns to that page the next time you open Salesforce Mobile.
- Generally, most Salesforce Mobile pages contain lists of information. To scroll through lists, drag up and down. Flick to scroll quickly.
- List views in Salesforce Mobile have an index along the right side. Tap a letter to jump to items starting with that letter. Drag your finger along the index to scroll quickly through the list.
- 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.

- The back button in the upper-left corner shows the name of the previous list. Tap it to go back.

Application Information

The App Info screen in Salesforce 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 iPhone from the App Info screen.

To access the Salesforce Mobile application information on your iPhone:

1. Tap **More**, then tap **App Info**.
2. Optionally, perform one of the following tasks:
 - [Synchronize Data](#)
 - [Clear Searched Records](#)
 - [Clear Recent Items](#)
 - [Erase Data](#)
 - [View Application Details](#)
3. When you are finished, tap **More** to return to the list of objects, or select a tab to leave the App Info screen.

Synchronize Data

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

Once every 24 hours, Salesforce 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 phone.

Additionally, the mobile client application checks for data changes every 20 minutes. Because only one application can run on the iPhone at a time, Salesforce Mobile cannot request data unless the application is open. When you launch the application, it performs an incremental update if a data synchronization 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 phone. Modifications to any records already stored on your phone are also sent. If you want to manually refresh the data on your phone, 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 [App Info screen](#). This information also displays at the top of each [list view](#) in the mobile application.

To perform a full update:

1. Open the App Info screen.
2. Tap **Refresh All Data**.

To perform an incremental update:

1. Open the App Info screen.
2. Tap **Sync Now**.

Clear Searched Records

Although the data automatically delivered to your phone 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 phone on every full data update.

To clear the records you downloaded through online searches:

1. Open the App Info screen.

2. Tap **Clear Searched Records**.

Clear Recent Items

The Recents tab displays items you recently accessed in Salesforce Mobile. Depending on your organization's settings, the tab may also display items you recently accessed on the Salesforce website.

To clear the list of items on the Recents tab:

1. Open the App Info screen.
2. Tap **Clear Recent Items**.



Note: For more information about the Recents tab, see [Accessing Data](#) on page 8.

Erase Data

An iPhone activated by a Salesforce user contains both the mobile client application and a set of the user's Salesforce data. You can remove the data from an iPhone without uninstalling the mobile application. You might erase the data if an administrator gave you an iPhone that belonged to another user, and you need to activate your Salesforce account on the phone.

1. Open the App Info screen.
2. Tap **Erase All Data**.
3. Tap **Erase All Data** again.

After the data is removed, the activation screen appears.

View Application Details

Scroll down the App Info screen to view information about the application.

App Info Table	Description
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 Mobile version installed on your phone.
Device Information	Lists the name of your iPhone, 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.

Chapter 3

Working with Records

With Salesforce Mobile, you can view the Salesforce records stored on your iPhone and search online for records not available in your local data set. You cannot create, edit, or delete records, however.

The mobile application supports all custom objects and the following standard objects:

- Accounts
- Contacts
- Events
- Leads
- Opportunities
- Tasks

Accessing Data

The tabs along the bottom edge of the Salesforce Mobile window allow you to access data in the application. When you open the application for the first time, the tab bar contains five tabs—three default tabs and two object tabs. The default tabs that appear in the tab bar are:

- **Recents:** Displays items you recently accessed in Salesforce Mobile. Depending on your organization's settings, the tab may also display items you recently accessed on the Salesforce website.
- **Search:** Displays the Search screen so you can search for records online. See [Searching](#) on page 9.
- **More:** Displays a list of all mobilized objects so you can select objects that are not on the tab bar. You can define what appears on the tab bar. See [Customizing Tabs](#).

Your Salesforce administrator defines which objects are available to you in Salesforce Mobile. Selecting an object's tab displays a list of records for the object. For example, tapping the Accounts tab opens a list of accounts. Once you are in an object's list view, you can perform one of the following actions:

- To view a record, tap the record name.
- To view a record's related items, scroll to the bottom of the page and tap one of the related lists.



Note: Standard and custom list views are not available in Salesforce Mobile for iPhone.

Customizing Tabs

In Salesforce Mobile, the tab bar contains five tabs. The location of the More tab is permanent, but you can customize the other four tabs. To define the tabs on your tab bar:

1. Tap **More**, and then tap **Edit**. The Configure screen displays all available icons in the application.

2. Drag and drop an available icon onto the tab bar to replace the current icon. You can arrange the icons on the tab bar by dragging them horizontally to the desired location.
3. Tap **Done** to save the arrangement.

Searching

The Salesforce data available on your iPhone is defined by the mobile configuration your administrator assigned to you. If you cannot find a specific record, you can search for it. When you search for items, Salesforce Mobile:

- Searches both local and online records.
- Searches all objects with tabs that have been mobilized and marked as searchable.
- Searches the same fields as the Sidebar Search on the Salesforce website. See "Search Fields" in the Salesforce online help for a complete list of the fields.
- Automatically adds a wildcard to the end of your search string.

To search for records:

1. Tap **Search** on the tab bar. If the Search tab is not visible, tap **More**, and then tap **Search**.



Note: Without a cellular or Wi-Fi connection, Salesforce Mobile cannot perform an online search.

2. Select the type of object you want to find. For example, to search only in contact records, tap **Contacts**. If you do not want to constrain your search to single object type, tap **Search All**.
3. Type keywords in the search box at the top of the page. You must type at least two characters in order to start a search.
4. Tap **Search**.
5. To open an item in the search results, tap the record. If the record is online instead of local, it is automatically downloaded 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 phone by opening the [App Info screen](#) and tapping **Clear Search Results**.

Using iPhone Features with Salesforce Mobile

Salesforce Mobile integrates with several native iPhone applications: Mail, Phone, and Safari. From a Salesforce record, you can:

- [Make a call](#)
- [Send an email](#)
- [Map an address](#)

Making Calls

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

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 Mobile window.

Sending Email

Salesforce Mobile is integrated with iPhone's HTML email client, which means you can send emails from Salesforce records that contain email addresses. To send an email:

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 button and then tap the Salesforce Mobile icon to return to the last Salesforce page you visited.

Mapping Addresses

Salesforce Mobile can help you find the location of a contact, account, or lead. To map an address:

1. Verify that your phone is connected to a cellular or Wi-Fi network.
2. Open a contact, lead, or account record.
3. Tap an address to launch Safari and display the location in Google Maps.



Note: Only addresses in blue text are hyperlinks.

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

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