

Increase Efficiency with Salesforce1 and Publisher

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Salesforce1 is a mobile app that allows access to Salesforce from mobile devices. Users must have the "API Enabled" permission enabled to access Salesforce1.

Salesforce1 supports most of the declarative customizations, including custom fields, custom objects, and record types and page layouts. If any change is made to a page layout in the Web version, the mobile version gets automatically updated.

Admins can customize compact layouts to display the most useful information

The screenshot shows the Salesforce1 Setup page. On the left is a sidebar with a search bar and a list of setup categories: Salesforce1 Setup, Force.com Home, and Administer. Under Administer, 'Mobile Administration' is expanded, showing 'Mobile Navigation' as the selected item. The main content area is titled 'Mobile Navigation' and contains instructions on how to organize the navigation menu. Below the instructions is a 'Navigation Menu Items' configuration window. This window has two columns: 'Available' and 'Selected'. The 'Available' column is currently empty. The 'Selected' column contains a list of items: Feed, Today, Dashboards, Tasks, Smart Search Items, People, Groups, Reports, Events, and Approvals. Between the columns are 'Add' and 'Remove' buttons. To the right of the 'Selected' list are 'Up' and 'Down' arrow buttons. At the bottom of the window are 'Save' and 'Cancel' buttons. A note at the bottom of the window states: 'Use SHIFT + click or click and drag to select a range of adjacent items. Use CTRL + click to select multiple items that are not adjacent.'

Publisher actions allow users to create records, update records, and log calls from the chatter feed or the publisher in Salesforce1.

Object-Specific Publisher actions:

Create

- Allow users to create records.
- Respect validation rules and required field settings.

Log a Call

- Allows users to log phone calls or other customer interactions.
- Is saved as a completed task.

Update

- Allow users to make changes to a record from the record detail page.
- Must be object specific.
- Respect validation rules and required field settings.

Custom

- Require Visualforce pages with developer-defined functionality.

Global Publisher Actions:

Display on the home page, the Chatter tab, or record detail pages.

- Create
- Log a Call
- Custom

Chatter > Groups > All AW Computing

Post File New Task More

Share with All AW Computing

Show All Updates

Admin User

I added a new level of enforcement to lead records to ensure consistent

Subject

Name

Contact

Related To

Account

Log a Call

No automatic relationship with other records



Update publisher actions cannot be global. They are always object specific.



Setup | Create | Global Actions | Publisher Layouts