

Salesforce 1

Lesson 24: Introduction to Salesforce 1

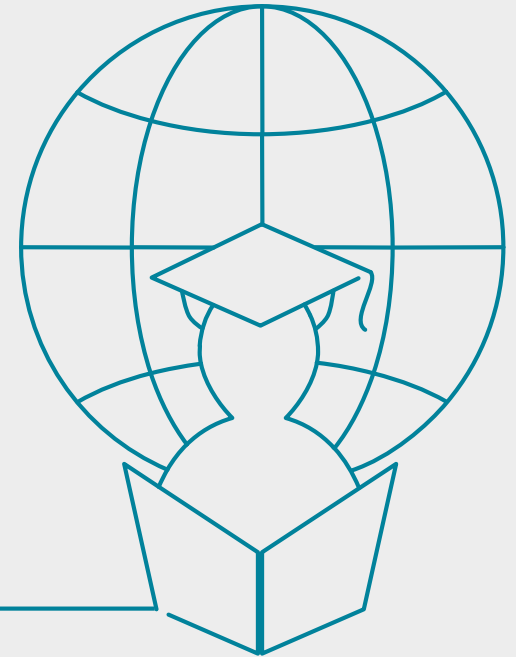
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Lesson Objectives

By the end of this lesson, you will be able to:

- What is Salesforce1?
- Getting started with Salesforce 1
 - Feed
 - Action bar and Menu
 - Navigation Menu
 - Record View
- Configuring Salesforce 1



24.1: Salesforce 1

What is a Salesforce1?

Salesforce1 apps are Salesforce on the go!

They are mobile apps which give access your users real-time access to the same information that they see in office

You can get Salesforce1 in different ways:

- As a downloadable app from the App store
- As mobile browser app that runs in supported mobile browsers

24.2: Getting started with Salesforce1

Getting started with Salesforce1

When a user logs in to Salesforce1, they will see a landing page

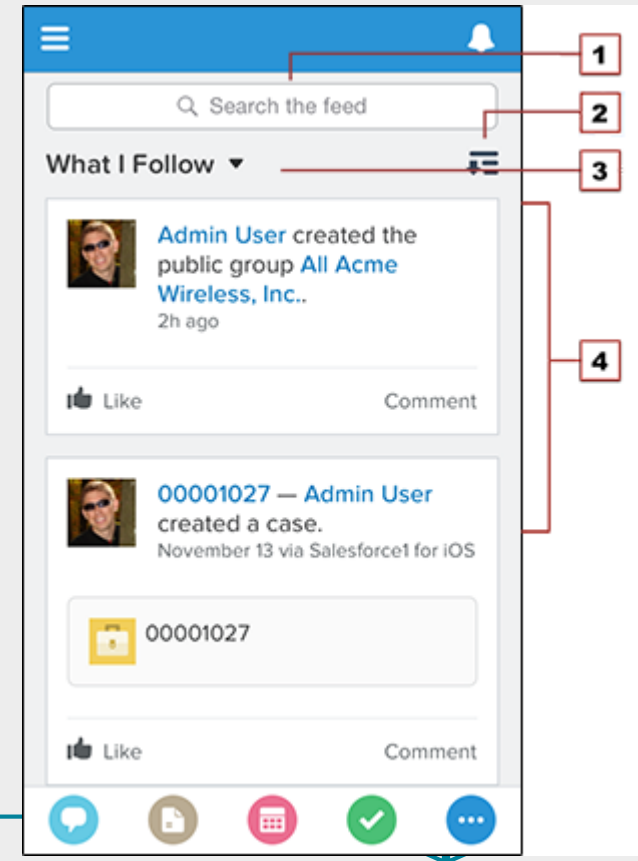
The Feed:

Chatter feed shows users their updates

- Updates to records
- Updates in groups they follow

Pulling down on the feed will show

1. Search bar
2. Sort and filter options
3. The feeds drop down menu
4. Feed items



24.2: Action Bar and Menu

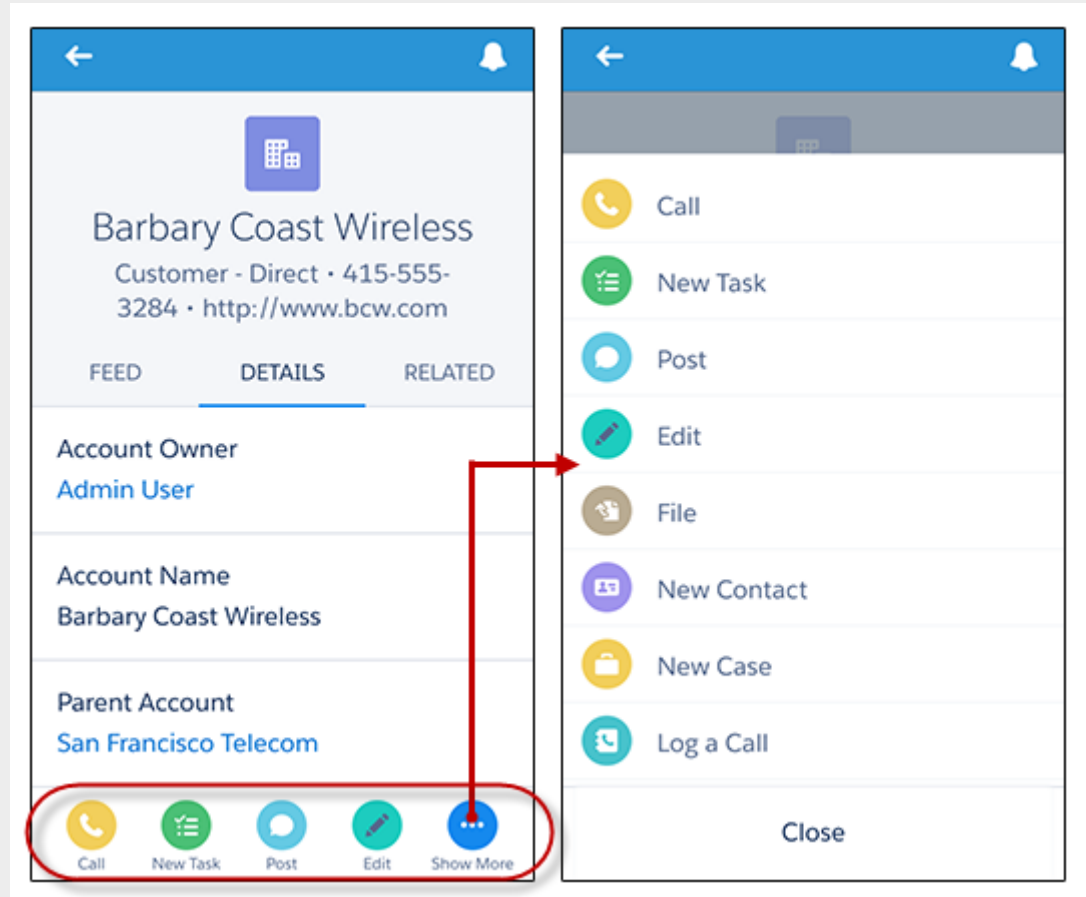
Action bar and Menu

Actions in Action bar and action menu change according to the feed or the record page viewed by the user


From feed you can see global action

From record page you can see mix of productivity actions, standard and custom buttons

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



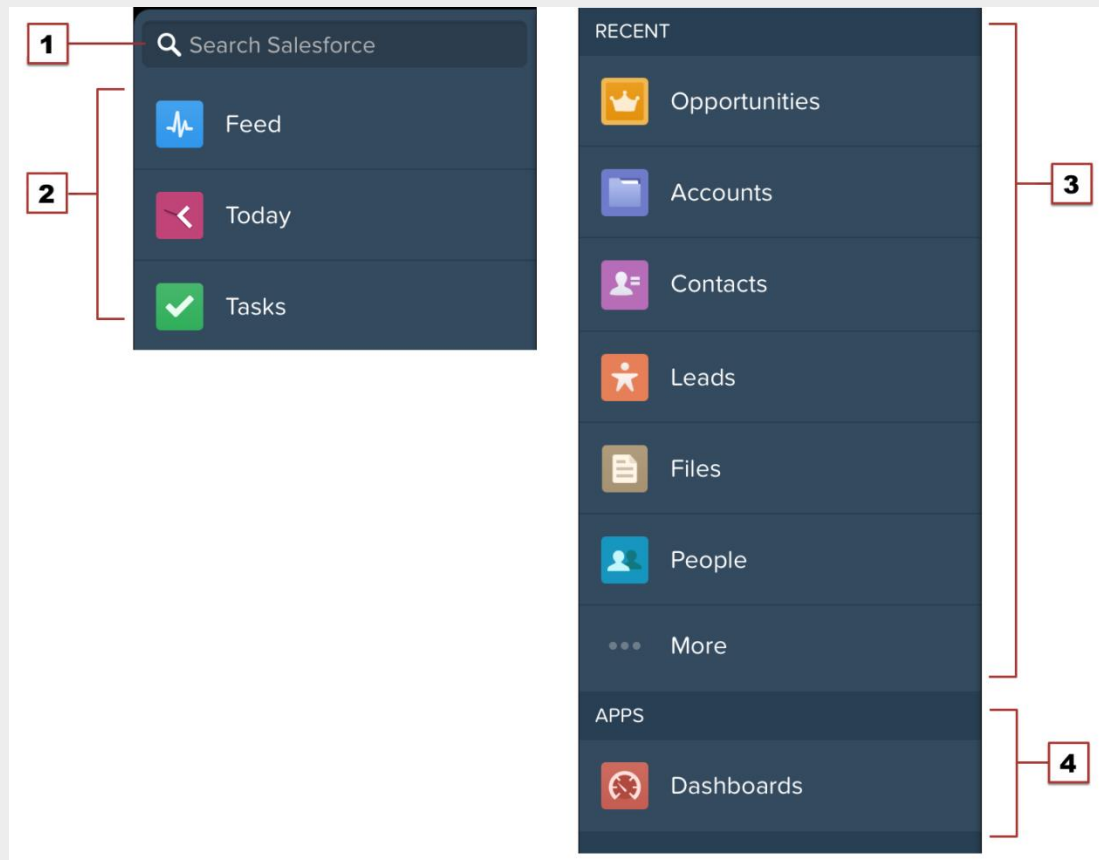
24.1: Salesforce1 Navigation Menu

Navigation menu can be accessed using 

Administrator can configure and the options available will be based on your organization and what user has access to, as per permissions and profiles

Options:

1. Search box
2. Menu items
3. Smart search items
4. Apps selection



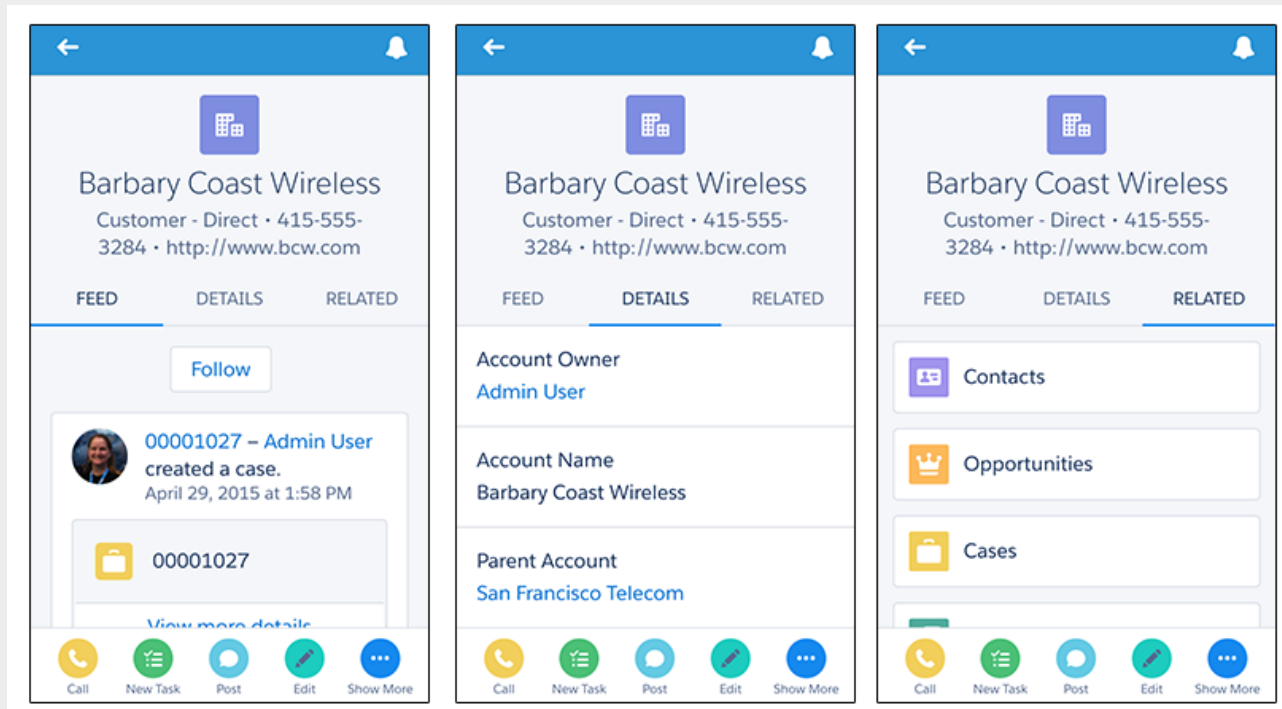
24.2: Record View

Record View

Record View is made up of the record detail, and related information pages

Users can swipe left and right to see the information

If your organization doesn't have Chatter enabled, the record view only includes the detail and related information pages

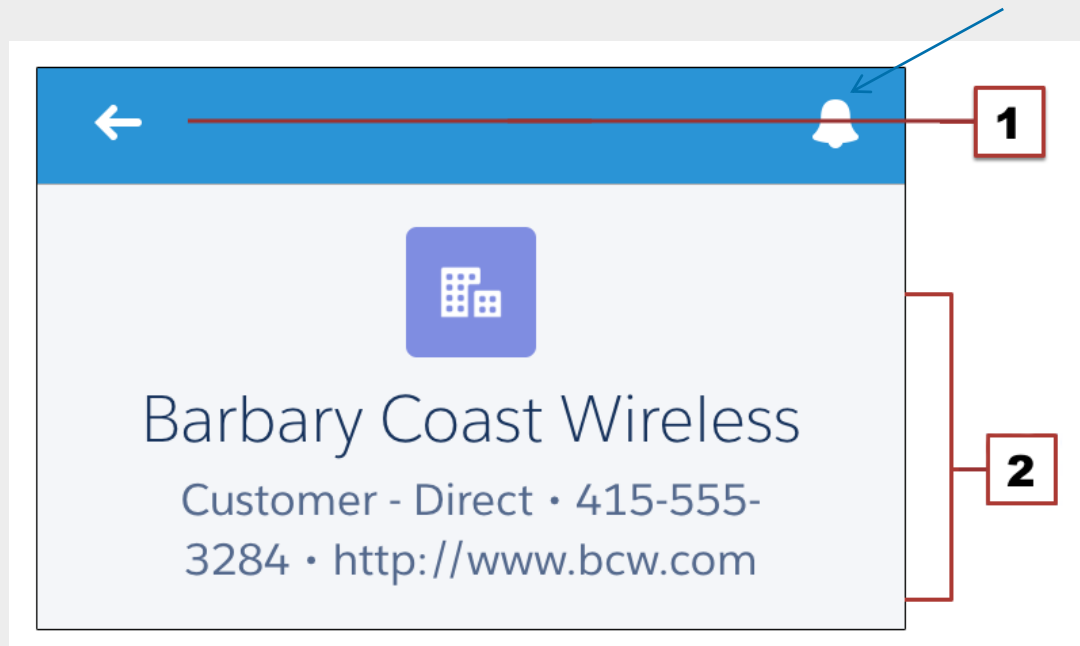


24.2: Record View

Record View

At the top of each record page is the record highlights area

1. Back arrow
2. Record highlight



24.2: Configuring Salesforce1

Configuring Salesforce1

Salesforce1 doesn't require much configuration at the beginning, but before your users start using Salesforce1, you should:

1. Define which users can access the Salesforce1 mobile apps
2. Enable notifications

Downloadable apps:

- Salesforce1 for Android
- Salesforce1 for iOS

Mobile browser App

- By default, the mobile browser app is turned on for your organization
- Configuration steps:
 1. From Setup, enter *Salesforce1 Settings* in the Quick Find box, then select Salesforce1 Settings.
 2. Select Enable the Salesforce1 mobile browser app to allow all users in your organization to access the app. Deselect this option to turn off access to the app
 3. Click Save

24.2: Notifications in Salesforce1

Notification Salesforce1

Two types of Notification:

- In app notifications
 - In app notifications keep users aware of relevant activity while using Salesforce1. You can view the 20 most recent notifications received within last 90 days
- Push Notifications
 - Push notifications are alerts that appear on a mobile device when a user has installed Salesforce1
 - 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 notification on the device
 - Some notifications include text that your users enter in Salesforce
- Configuration steps: to enable notifications
 1. From Setup, enter *Salesforce1 Notifications* in the Quick Find box, then select Salesforce1 Notifications.
 2. If they're not already selected, select both Enable in-app notifications and Enable push notifications.
 3. Click Save.

24.2: Offline Access to Salesforce1

Offline Access to Salesforce1

- Offline access is available for users in the Salesforce1 downloadable apps only
- When you enable caching and Offline Edit for Salesforce1, users can keep working
- Caching in Salesforce1 is enabled the first time someone in your org installs one of the Salesforce1 downloadable apps
- You can manage this setting from Setup—enter *Salesforce1* in the Quick
- Find box, then select Salesforce1 Offline



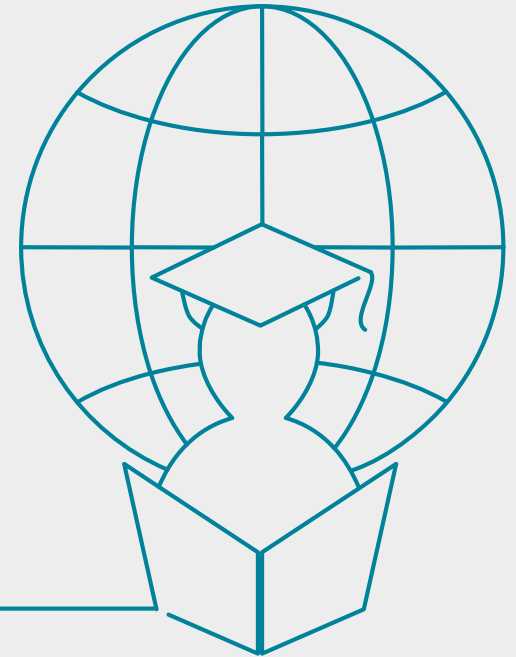
Summary

Salesforce1 is for real-time data access for mobile users

You should be familiar with following options:

- Feeds
- Action bar and Menu
- Navigation menu
- Record view

We can configure user access and notifications for Salesforce1



Module Review

Q1: Who are the intended users of Salesforce1?

Q2: What are the types of notifications?