



Salesforce Mobile App



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Salesforce Mobile App

The Salesforce mobile app is Salesforce on the go! This enterprise mobile experience gives you access to the same information you see in the office, but organized for getting work done between customer meetings, while waiting for a flight, even when you're in line for coffee. The mobile app includes many of your org's customizations, so it's tailored to your business needs. Salesforce for iOS is available from the App Store, and Salesforce for Android is available from Google Play. The Salesforce mobile app is included with all Salesforce orgs.

-  **Note** The Salesforce mobile app puts key data and features at your disposal, wherever you are. But there are business activities that are probably better done from your laptop or desktop. To see data or use actions that aren't available in the mobile app, use Lightning Experience or Salesforce Classic instead.

[Considerations for the Salesforce Mobile App](#)

Before you set up and use the Salesforce mobile app, learn about security, limitations, accessibility, and more to ensure a smooth mobile experience for your users.

[Set Up the Salesforce Mobile App](#)

Learn more about device requirements and access to get the most out of the Salesforce mobile app.

[Customize the Salesforce Mobile App](#)

The Salesforce mobile app is fully customizable to the needs of your users. Customize branding, navigation, and more to get the most of out of running Salesforce on mobile devices.

[Work Offline with the Salesforce Mobile App](#)

Your mobile users' productivity doesn't have to stop when there's no connectivity. When you enable caching and Offline Edit, users can keep working, unimpeded by a subway commute, FAA regulations, capricious cellular signals, or bunker-style buildings. Offline access is available for Salesforce for Android and iOS.

[Help Your Users Succeed with the Salesforce Mobile App](#)

As Salesforce admins, we know that you are the first line of help to your end users when they have questions about using all things Salesforce. Here are some resources to help your end users get the most out of the Salesforce mobile app and address some common situations that differ from the Salesforce full site experience.

[Simplify Daily Tasks with Einstein Generative AI in the Salesforce Mobile App](#)

Einstein Generative AI features including Agentforce and Prompt Builder allow your users to streamline daily tasks and be ever more productive. Ask Agentforce to summarize records, draft emails, show related records, and execute all your custom agentic actions in a conversational and intuitive experience on the Salesforce mobile app.

[View Optimized Lightning Reports with Enhanced Reports](#)

In this improved reports experience for iOS and Android, you get a responsive user interface for quick

and efficient consumption on mobile devices.

Consolidate Your Data with Unified Analytics

Unified Analytics is your home base for all your analytics on your iOS and Android devices. Go to the section for your operating system to get more details about Unified Analytics, such as navigation and finding items.

Stay Informed With Tableau Next Mobile Overview

Tableau Next Mobile empowers users to engage with their data insights anytime, anywhere, fostering a culture of data-driven decision-making beyond the confines of the traditional office. Furthermore, Tableau Next Mobile enhances collaboration by allowing users to easily share insights with colleagues, which promotes a more connected and informed workforce, leading to more effective problem-solving and improved business outcomes.

Considerations for the Salesforce Mobile App

Before you set up and use the Salesforce mobile app, learn about security, limitations, accessibility, and more to ensure a smooth mobile experience for your users.

 **Note** The Salesforce Mobile App isn't available in the Apple App Store in mainland China.

Migrating Connected Apps to External Client Apps

The Mobile Publisher platform is transitioning from using Connected Apps (CA) to External Client Apps (ECA). This migration reduces manual effort and bottlenecks associated with creating and managing Connected Apps.

Salesforce Mobile App Rollout Strategy

To learn more about best practices and to get the most out of the Salesforce mobile app, check out our resources on Trailhead.

Data Available in the Salesforce Mobile App

The Salesforce mobile app uses your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets to determine the data that's available to you. You see most of the objects, record types, fields, and page layouts that you do when working in the full Salesforce site. But not all Salesforce data is available in the app.

What's Different or Not Available in the Salesforce Mobile App

The Salesforce mobile app doesn't include all the functionality that's available in Lightning Experience on desktop. Learn about the Salesforce features that aren't available, that have functional gaps from what you're used to in Lightning Experience on desktop, or that work differently.

Salesforce Mobile App Considerations for Tablets

Learn about the layout and special considerations for using the Salesforce mobile app on tablets.

Salesforce Mobile App Accessibility Considerations

The Salesforce mobile app provides users working with screen readers and other accessibility features a fully accessible mobile experience. If you use the Salesforce mobile app with an assistive device, keep these tips in mind.

Salesforce Mobile App Language Considerations

The Salesforce mobile app gets language support from the language and region settings on the mobile device, the language setting for the mobile device's default browser, and the language and region settings in the user's Salesforce user profile. If these settings differ, users can see different languages in the app.

Migrating Connected Apps to External Client Apps

The Mobile Publisher platform is transitioning from using Connected Apps (CA) to External Client Apps (ECA). This migration reduces manual effort and bottlenecks associated with creating and managing Connected Apps.

The main goal of the migration is to provide a smooth process for existing applications, avoiding the need for customers to submit new apps or create new external client apps. However, there are a few important considerations regarding potential impacts:

- Migration Time: The migration takes 1-3 minutes. Salesforce will communicate with admins before the migration takes place.
- Setup Lock: During the migration process, you can't make any changes to the Mobile Publisher Setup configurations.
- Consumer Key: The migration process is designed to keep the consumer key the same.
- Connected App Status: The original Connected Apps remain installed and visible to customers. However, they're no longer used for authentication, and any changes you make to policies won't be reflected in the app experience.
- Functionality: The migration keeps all existing connected app settings.

Sandbox Considerations

The migration efforts for existing Connected Apps to External Client Apps (ECA) are intended only for production orgs. Customers must manage their sandbox environments as if these are new External Client Apps.

After a production org's connected apps are migrated, you need to manually deploy ECAs from your production org to your sandboxes. You have two options to get ECAs to sandboxes:

- Deploy ECA metadata to the sandbox using Mobile Publisher. Using metadata in this way doesn't copy any app policies to the sandbox, and must be done so manually.
- Refreshing your sandbox. A sandbox refresh copies all policies related to an ECA.

Salesforce Mobile App Rollout Strategy

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[Salesforce Mobile App Rollout](#)

[Salesforce Mobile App Customization](#)

[Salesforce Mobile SDK Basics](#)

Data Available in the Salesforce Mobile App

The Salesforce mobile app uses your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets to determine the data that's available to you. You see most of the objects, record types, fields, and page layouts that you do when working in the full Salesforce site. But not all Salesforce data is available in the app.

REQUIRED EDITIONS

The Salesforce mobile app available in: all editions except **Database.com**

These objects are available as items in the Salesforce mobile app navigation menu. You can create, view, and edit records for these objects unless noted otherwise.

- Accounts
- Assets
- Campaigns
- Cases
- Contacts
- Content Libraries (*iOS only*)
- Contracts
- D&B Company (*view only*)
- Dashboards (*view only*)
- Einstein Dashboards
- Events
- Files
- Forecasts (*iOS only*)
- Knowledge Articles (*view only*)
- Leads
- Live Chat Transcripts
- Opportunities
- Orders
- Quotes (*create from opportunities only*)
- Reports (*view only*)
- Social Personas and Social Posts
- Tasks
- WDC Coaching, Goals, Thanks, Rewards, and Skills (*Skills is available for Android only*)
- Work Orders
- Custom objects that have a tab you can access
- Salesforce Connect external objects that are searchable and have a tab you can access

With some exceptions, all the standard and custom fields are available on these records. And you can work with most of the related lists for these objects.

If Chatter is enabled, you can access feeds, groups, and people (user profiles). You can access user profiles even if Chatter is disabled.

You can also use Salesforce Today to prepare for meetings, stay in touch with customers, quickly join conference calls, and generally manage your day.

What's Different or Not Available in the Salesforce Mobile App

The Salesforce mobile app doesn't include all the functionality that's available in Lightning Experience on desktop. Learn about the Salesforce features that aren't available, that have functional gaps from what you're used to in Lightning Experience on desktop, or that work differently.

 **Note** The Salesforce Mobile App isn't available in the Apple App Store in mainland China.

[Data Access and Views: What's Different or Not Available in the Salesforce Mobile App](#)

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

[Sales Features: What's Different or Not Available in the Salesforce Mobile App](#)

Learn about differences between the Salesforce desktop and mobile apps.

[Productivity Features: What's Different or Not Available in the Salesforce Mobile App](#)

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

[Data Quality and Enhancement: What's Different or Not Available in the Salesforce Mobile App](#)

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

[Customer Service Features: What's Different or Not Available in the Salesforce Mobile App](#)

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

[Reports and Dashboards: What's Different or Not Available in the Salesforce Mobile App](#)

Reports and dashboards have some limitations and differences in the Salesforce mobile app, such as the maximum number of rows displayed in reports, the absence of joined reports, and the inability to create, edit, or delete reports and dashboards. Dashboards have a single-column layout on phones and up to two columns on tablets, and report charts are only available after drilling into a dashboard component's report.

[Salesforce Files: What's Different or Not Available in the Salesforce Mobile App](#)

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

[Chatter: What's Different or Not Available in the Salesforce Mobile App](#)

Learn about Chatter functionality in Lightning Experience on desktop that isn't available or that works differently in the Salesforce mobile app.

[Experience Cloud Sites: What's Different or Not Available in the Salesforce Mobile App](#)

Experience Cloud sites in the Salesforce mobile app are similar to the Lightning Experience desktop site, with some differences.

[Navigation and Actions: What's Different or Not Available in the Salesforce Mobile App](#)

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

[Search: What's Different or Not Available in the Salesforce Mobile App](#)

Global search in the Salesforce mobile app uses the same search index as Lightning Experience and Salesforce Classic, so you always search the same data.

[Entering Data: What's Different or Not Available in the Salesforce Mobile App](#)

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

[Approvals: What's Different or Not Available in the Salesforce Mobile App](#)

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

Offline Access: What's Different or Not Available in the Salesforce Mobile App

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

Salesforce Customization: What's Different or Not Available in the Salesforce Mobile App

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

Data Access and Views: What's Different or Not Available in the Salesforce Mobile App

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

Supported Objects and Data

These objects are available as items in the Salesforce mobile app navigation menu. You can create, view, and edit records for these objects unless noted otherwise.

- Accounts
- Assets
- Campaigns
- Cases
- Contacts
- Content Libraries (*iOS only*)
- Contracts
- D&B Company (*view only*)
- Dashboards (*view only*)
- Einstein Dashboards
- Events
- Files
- Forecasts (*iOS only*)
- Knowledge Articles (*view only*)
- Leads
- Live Chat Transcripts
- Opportunities
- Orders
- Quotes (*create from opportunities only*)
- Reports (*view only*)
- Social Personas and Social Posts
- Tasks
- WDC Coaching, Goals, Thanks, Rewards, and Skills (*Skills is available for Android only*)
- Work Orders
- Custom objects that have a tab you can access
- Salesforce Connect external objects that are searchable and have a tab you can access

 **Note** To be available in the Salesforce mobile app, objects must have a tab that you can access, including supported standard objects and your org's custom and external objects. The Salesforce

mobile app doesn't support the User object or provide access to user record detail pages. However, user fields are supported and appear on user profiles, in related lists, and so forth. See "Fields" for some issues with user fields.

The Salesforce mobile app doesn't support:

- Standard or custom Salesforce apps. (Instead, the navigation menu gives users access to all objects that are available to them in the mobile app.)
- Salesforce Console or Agent Console.
- Advanced currency management.

Fields

Field differences between the Salesforce desktop site and the Salesforce mobile app.

Unsupported Fields

- Division fields

Combo Boxes

- Combo boxes, which combine a picklist with a text field, aren't available. Typically the text field is available but the picklist isn't.

Lookup Fields

- User-defined lookup filter fields aren't supported.
- You can't create a record from a lookup field like you can in Lightning Experience. You can create an account from the Account Name lookup field on the Salesforce App Lead Conversion page. You can't create records from other lookup fields on Mobile.
- Lookup fields in Salesforce Classic show record names regardless of sharing permissions. As a result, users can see the names of records that they can't access. In Lightning Experience and the Salesforce mobile app, lookup fields respect sharing permissions and only show the name of records that the user can access. The one exception is owner lookup fields, which always display the name of the record's owner, regardless of sharing permissions.

Picklist Fields

- Controlling and dependent picklists are supported, but doesn't display indicators on create and edit pages for these fields. To determine if a picklist field is dependent, and which picklist field controls it, switch to the full site.
- Disabled picklists aren't grayed out like they are in the full site.

Phone Number Fields

- The keypad that displays in phone number fields doesn't include parentheses, hyphens, or periods, and doesn't apply any phone number formatting when you save the record. To apply a specific phone number format, edit the record in the full site.

Rich Text Area Fields

Support for rich text area fields varies by the version of the Salesforce mobile app and the type of device.

App Version	View Rich Text Area Fields	Edit Rich Text Area Fields
Salesforce for Android	Yes	Yes
Salesforce for iOS	Yes	Yes

User Fields

- While user detail pages aren't available in the app, user fields are supported and appear on user profiles, in related lists, and so forth.
- There are some issues when these user fields appear in related lists or mobile cards.
 - The **Company Name** field is blank if an internal user is viewing a mobile card or related list entry related to another internal user. If the referenced user is an external user, the company name appears correctly.
 - The **Active** field is blank unless the user is inactive.

List Views

- Creating list views or editing existing list views isn't supported.
- Editing a record's field in a list view isn't available. Instead, users can open the record then tap the **Edit** action.
- Selecting multiple records in list views isn't supported.
- Mass actions, which allow you to apply an action to multiple records at the same time, aren't available.
- List views aren't automatically updated. To see a new record, refresh the list by pulling down on the page.
- Kanban and split view aren't supported.
- Some filter functionality for list views is limited on the Salesforce mobile app, including:
 - You can't see or change existing list view filters, but to further narrow records, you can apply additional filters. These filters affect only your view in the mobile app and don't impact list view data for other users.
 - Each filter in the mobile app supports only one operator. These operators can't be changed.
 - Filters on checkbox, email, phone, picklist, text area, and URL field types use the equals operator. Filters on most other text field types use the contains operator.
 - To filter a list view by an address, you filter on individual address components. Most address field filters use the contains operator, but Street field filters use the equals operator.

Record View and Record Highlights

Record differences between the Salesforce desktop site and the Salesforce mobile app.

- Record highlights show up to the first 7 fields on desktop and up to the first 10 fields in the Salesforce mobile app.
- You can't collapse sections on the record detail page on the Salesforce mobile app.

Related Lists

- Related lists display the first four fields that aren't defined in the Related List section on an object's page layout. The number of fields shown can't be increased.
- Related lists aren't automatically updated. To see a new record, refresh the list by pulling down on the page.
- Some related lists aren't available in the mobile app, including:
 - Content Deliveries
 - External Sharing
 - Related Content
- List buttons aren't supported for some related lists, including:
 - Open Activities
 - Activity History
 - Approval History
 - Contact Roles
 - Partners
- The Notes and Attachments related list isn't fully supported. There are several issues, including:
 - Attachments added in the full Salesforce site aren't guaranteed to open in the app, even if they appear in the related list. We recommend using Files instead. Documents that are uploaded to the Files tab in the full site are then viewable.
 - You can't add or delete notes or attachments from the related list. But you can create a note and relate it to a record, using the Note () action in the action bar. This action isn't available for all objects, depending on how your administrator configures Notes.
 - Notes and attachments on child records don't display on the parent record's related list.
- Uploads using Files related lists aren't supported.
- If a related list is sorted by a text area field, it doesn't display any records.

Sales Features: What's Different or Not Available in the Salesforce Mobile App

Learn about differences between the Salesforce desktop and mobile apps.

Accounts

- You can't view account hierarchies in the Salesforce mobile app.
- Automated Account Fields isn't available in the Salesforce mobile app, so when users create an

- account, they don't see suggested companies in the Account Name field.
- You can't use the Salesforce mobile app to merge duplicate accounts.
 - You can view attachments in the Salesforce mobile app, but you can't edit them.
 - The **Team Member Access** action isn't available in the Salesforce mobile app.
 - The **Enable as Partner** and **Disable Partner Account** actions aren't available in the Salesforce mobile app.

Campaigns

- The **Manage Members** and **Advanced Setup** buttons aren't available.
- In addition, bulk actions on campaign members aren't supported.
- Campaign Hierarchy is available only as a related list. The **View Hierarchy** option in a link on the campaign detail page isn't available. When you view a parent campaign, the Campaign Hierarchy related list shows only the child campaigns. The desktop Salesforce site displays both the parent and child campaigns.
- Sharing settings aren't available on campaign detail pages.
- When viewing the Campaign Members related list, only the members' Status appears. However, you can tap members to see more details about them.

Contacts

- Contacts to Multiple Accounts:
 - Only the list item actions that are specific to the Account Contact Relationship object are available on the Related Accounts and Related Contacts related lists. Therefore, you see actions to view or remove the account-contact relationship, but not to edit or delete the contact or account record.
 - From the Related Contacts related list, you can navigate to a contact record, but not an account record.
- You can't view the contact hierarchy.
- Activity logs aren't created when you use the  icon to send emails.
- The **Request Update**, **Manage External User**, and **Enable Customer User** buttons aren't available.
- You can't add a contact to a campaign.
- You can't merge contacts.
- You can't use the Salesforce mobile app to edit or delete a person account in a contact list view or related list. To edit or delete a person account on a mobile device, navigate to the person account record.

Contracts

- Creating contact roles on contracts isn't available.

Forecasts

- You can adjust your own forecasts but not your subordinates' forecasts.
- Removing adjustments isn't supported, but you can edit your own adjustments.

- Changing the forecasting currency isn't supported.
- Selecting whether to show or hide quota information isn't supported.
- Custom forecasts page layouts that you use in desktop aren't available in the Salesforce mobile app.
- If you have Pipeline Inspection enabled, deal-level insights in the forecasts opportunity list aren't available in the Salesforce mobile app.

Leads

- Lead conversion:
 - You can create opportunities, but you can't select existing ones.
 - You can't select lead sources across duplicate records. The lead source defaults to the duplicate contact.
 - You can't create related tasks during the conversion, but you can create tasks from the contact record.
 - You can't automatically notify owners of converted leads.
 - Account details aren't auto-populated when creating an account.
 - You can choose an existing account or create one. To create an account, tap the Account field on the record and select **New**.
 - You can view Converted Leads only from the Recent Leads list view. Converted Leads don't appear in any other list views in Salesforce for Android and iOS.
 - You can convert leads without company information to existing business accounts even if person accounts are enabled. In Lightning Experience, leads without company information must be converted to person accounts.
- The **Find Duplicates** and **Unlock Record** buttons aren't available.
- You can't merge leads.
- When you add a lead, the Campaign field isn't available. You can add a value to this field in the desktop Salesforce site.

Opportunities

- The Subtotal field on an opportunity product isn't available in the Salesforce mobile app.
- The **Team Member Access** action isn't available in the Salesforce mobile app.
- The Split Amount field isn't available, and other opportunity splits fields are read-only.
- You can use the Salesforce mobile app to relate a price book with an opportunity that doesn't have one. To change an opportunity's price book, use the desktop Salesforce site.
- In the Salesforce mobile app, you can edit one opportunity at a time. No multiline editor is available.
- Clone with Related isn't available in the Salesforce mobile app.
- Creating product schedules on opportunities isn't available. Users can edit or delete product schedules in the Salesforce mobile app that were created on the desktop site.

Orders

- You can't add or edit multiple products at the same time.
- You can't create reduction orders or select products to reduce.

Quotes

- Quote PDFs appear in the related list but aren't viewable.
- You can't add or edit multiple quote line items at the same time.
- You can't perform these actions.
 - Email quotes
 - Create or delete PDFs
 - Start sync or stop sync
 - Create quotes from the Quotes home page. You create quotes from opportunities.

Enterprise Territory Management

- The Assigned Territories related list on accounts and leads is read only, even for users with the Manage Territories permission.

Productivity Features: What's Different or Not Available in the Salesforce Mobile App

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

Salesforce Today

The Salesforce Today app is available in Salesforce for Android and Salesforce for iOS. It's not available in the Salesforce desktop site.

There are some issues when using Today.

- Access to Today is available only if you grant Calendar permission to the Salesforce mobile app.
- Chatter Free and Chatter External users aren't able to access Today because these user license types don't have access to contacts or person accounts.
- All of the Today cards update whenever you access Today from the navigation menu. But the cards aren't automatically updated if you navigate to Today other ways (for example, by using the Back button). Cards also aren't automatically updated when you take an action that affects the information shown in Today, such as creating a task. To update the Today page, pull to refresh.
- The set of actions that are available are the ones that are defined on the global publisher layout.
- Current Event and Agenda Cards:
 - Salesforce for Android and iOS selects only from Calendar Events that are stored locally on the mobile device. Salesforce events aren't available. To change which calendars on your mobile device are used, tap the gear icon on the Today page.
 - If some or all of your calendar servers don't automatically push data to your device, update your calendars to see the most current information in Today.
 - The 24-hour time format isn't supported.
 - For multiday events, only the ending date and time are shown in the highlights area.
 - For recurring multiday events, the wrong date and time can sometimes be shown.

- If your calendar doesn't display invitee names because the list is too long, Today shows a count of "1 invitee" in the Current Event and Agenda cards on the main view and doesn't show any invitees when you open the event.
 - For iCloud events, Today can't find a matching Salesforce record for a meeting organizer because the iCloud API doesn't return an email address.
 - Today uses the mobile device's time zone setting, while Salesforce events respect the user's Salesforce time zone setting. If there's a difference between these settings when a user logs a local event from Today, the Time field in the new Salesforce event record reflects the user's Salesforce time zone and doesn't match the time of the local event.
 - On Android devices, a meeting organizer's name might not display correctly if there isn't a matching Salesforce record for the person.
 - If another user makes updates to a mobile calendar event record while you're viewing the record in Today on an Android device, you don't automatically see the changes. The record is refreshed the next time you select it from the Today main view.
 - Because of how the Android operating system identifies local events, if a user accesses Today on an Android device to log a local event in Salesforce, then views the same event in Today on a different Android device or an iOS device, it might look like the event wasn't logged and it isn't possible to access the corresponding Salesforce event from Today. The logged event status and link is correct on the original Android device, however.
- To Me Feed Card:
 - Only posts that are less than 72 hours old are included. If all posts in your To Me feed are older, you don't see this card.
 - News Card:
 - You see this card if News is enabled for your org.
 - If there aren't any relevant account-related news items to show, you don't see this card.

Activities (Events and Tasks)

- Activity Timeline is enabled by default on the supported record types: accounts, contacts, leads, and opportunities. If you use Einstein Activity Capture, captured emails and events don't appear on the timeline. Filter and search aren't supported on the app.
- You can choose to disable Activity Timeline on the app for all users by adding a connected app custom attribute. In Setup, enter *Connected Apps* in the Quick Find box, select **Manage Connected Apps**, then click the name of the connected app you want to modify. In the Custom Attributes section on the connected app page, click **New**. Enter *DISABLE_ACTIVITY_TIMELINE* for the attribute key and "true" for the attribute value.
- Emails and events captured through Einstein Activity Capture can't be accessed through the Salesforce mobile app.
- The **Subject** field doesn't include a picklist of previously defined subjects when Show simpler New Task form on mobile is enabled in Activity Settings.
- Existing shared activities (created in Salesforce Classic and Lightning Experience) that use the **Name** field for contact associations can't be edited in the Salesforce mobile app.

Events Calendar

- You can't create a calendar from standard or custom objects.
- You can't create an event for another calendar application from a Salesforce event using the **Export Event** (formerly **Add to Outlook**) button. However, if you're set up to sync events using Einstein Activity Capture, events you create and edit from Lightning Experience or the Salesforce mobile app sync to Microsoft® or Google calendars automatically.
- When you create an event in the Salesforce mobile app, the start date defaults to today's date. Manually change the start date to your desired future date. Make this change even when you create an event by selecting a future date from the calendar.
- Invitee related lists (added in Salesforce Classic) display slightly different content. In the Salesforce mobile app, the invitee related list includes invitees only, whereas in the desktop site, it also includes the event owner. To reproduce the desktop site functionality, use an API query; see [EventRelation](#).
- To give reps access to attendees, add the **Attendees** field to the Event page layout for events. Attendees can see other attendees' responses from the Details tab in the Attendees field, but can't see responses from the related tab.
- Meeting attendees can't respond to event invitations from the Salesforce mobile app. Users can accept or decline only from their Microsoft® calendar or Google Calendar™. To send invitations to event attendees in Lightning Experience, there are some requirements. [Learn More](#)
- Reps can't share calendars with coworkers or view coworkers' calendars.
- Events reflect your Salesforce time zone and locale settings, not the time zone setting on your mobile device.
- If you view the event list while the time advances from 11:59 PM to midnight, the list isn't automatically updated to display the next day's date and time.
- Events that repeat have different names and behavior depending on where you create them. In Lightning Experience and the Salesforce mobile app, they're called event series. In Salesforce Classic, they're called recurring events. It's best practice to edit repeating events in the user interface where they were created.

Tasks

- Task list views created in Lightning Experience aren't available on the Salesforce mobile app. Instead, manage tasks using these lists: **My Tasks**, **Completed Within Last 7 Days**, **Delegated**, and **Today**. Some task lists available in Salesforce Classic, such as **This Month** and **All Open**, aren't available in the Salesforce mobile app.
- The Today list shows tasks that are due today and up to 10 overdue tasks. Tasks that have been overdue for more than 30 days don't show.
- In task lists, the order of the fields in the priority picklist determines the order in which tasks are sorted.
- Custom list views for Tasks aren't available on the Service mobile app.
- The more tasks that you have, and the more relationships that your tasks have to other records, the longer it can take to view tasks or use other features.
- When more than 1,000 overdue tasks exist, task lists in the Salesforce mobile app don't display any overdue tasks at all. Use reports to view your overdue tasks and close them, postpone them, or delete

their due dates.

- The **Assigned To** field is limited to one assigned to user. You can't assign tasks to multiple users by adding more than one value in the **Assigned To** field or by assigning the task to a group or queue.
- The **Create Recurring Series of Tasks** field isn't supported on quick action layouts. Because only a portion of the recurring task interface appears in new task quick actions, users can't save any new recurring tasks.
- You can't create recurring tasks with a frequency of every weekday. We don't recommend editing tasks with this frequency because the edit page doesn't show the task's recurrence settings. To create or edit tasks that repeat every weekday, use Salesforce Classic.
- If a task doesn't include a subject, it appears in feeds as [No Subject].
- The All Activity History tab isn't available.
- Reps can't create a task with a reminder unless you turn off the **Show simpler New Task form on mobile** setting. From Setup, enter *Activity Settings* in the Quick Find box, then select **Activity Settings**. Deselect **Show simpler New Task form on mobile**.
- Task layouts contain a few unique elements that make tasks easier to work with. These elements don't appear in a compact layout because you can't change them, but users always see them:
 - The and icons represent the status of the **IsClosed** field to users with the **Edit Task** permission.
 - The  icon represents a task marked high priority (including custom high priority).
 - If the due date exists and a user has permission to view it, all tasks show the due date.
 - Tasks include the primary contact and the related account or other record, when they exist.

The fields in each list can vary depending on the settings in your Salesforce org.

You control the layout of task records and tasks in the task list using compact layouts. You control related lists, as always, using the page layout editor. Adding the due date field to either layout doesn't change the appearance of tasks—that field never appears twice.

Below the built-in task elements, the Salesforce mobile app displays up to three other fields.

- The default compact layout for tasks includes two fields: the name of a lead or contact, and an opportunity, account, or other record the task is related to.
- In an Activities related list, a task's fields depend on what record you're viewing and how you've defined the layout for that object.

For more information, see [Compact Layouts](#).

Notes

- You can access all your notes from the Notes item in the navigation menu. The Salesforce Classic version of the desktop site doesn't include a Notes tab. Instead, Salesforce Classic users access notes from the **Files** tab.
- You can't share notes with other users or groups.
- In Salesforce for Android, you can't add images to notes. You can view images that were added from the desktop site. You can, however, add images to notes using Salesforce for iOS, version 10.0 or later.
- Some rich text options that are available in the desktop site, such as applying a bold or italic font or indenting a paragraph, aren't available. But you can view formatting that was added from the desktop site.
- Spelling errors aren't highlighted while creating or editing notes.

Email and Email Templates

- The app doesn't display emails in the improved layout that's available in Lightning Experience.
- Inbox isn't available.
- List email isn't available. However, users can see completed list email activities in the Activity History related list.
- You can't use Salesforce email templates.

Dialer

- Dialer features are available in Lightning Experience on the desktop only.

WDC

When using WDC features, you can't:

- Share goals and metrics
- Link metrics to reports
- Refresh metrics that are linked to reports
- Link parent goals and subgoals
- Add goal images
- Create custom badges
- Offer or request feedback
- View custom metric fields
- Create, fill out, or dismiss performance summaries
- Manage performance summary cycles

Salesforce Meetings

- Salesforce Meetings features are available in Lightning Experience on desktop only.

Data Quality and Enhancement: What's Different or Not Available in the Salesforce Mobile App

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

Duplicate Management

- The Salesforce mobile app doesn't alert users to existing duplicate accounts, contacts, or leads.
- The Salesforce mobile app does alert users when they're about to create an account, contact, or lead that appears to duplicate an existing record.
- Each possible duplicate is shown on a "duplicate card." The app displays a maximum of 30 duplicates (10 per object), even if there are more.

- A duplicate card displays three fields, which are derived from the search results format defined for your org, not from the associated matching rule.
- If users tap a duplicate card that appears while they're editing or creating a record, any information they entered before tapping the card is lost.
- By default, duplicate rules run when users complete fields on a record, rather than when they save a record.
- The Salesforce mobile app doesn't support merging of records.

Data Assessment and Data Integration

- Data Assessment for data in AppExchange packages isn't available.
- Account Data Assessment isn't available.
- You can see fields that were updated by data integration rules, but you can't use Data Integration to manually update records.

Customer Service Features: What's Different or Not Available in the Salesforce Mobile App

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

Cases and Case Feed

- For organizations that have the legacy “Page Layouts for Case Feed Users” enabled, users who are assigned the “Use Case Feed” permission see the standard case layout.
- Standard actions on Case Feed aren't available. But several actions that duplicate this functionality are available. Salesforce admins can add these actions to the Salesforce Mobile and Lightning Experience Actions section of the case page layout so they're available from the action bar when working with cases.

Standard Action Available in Salesforce Classic	Equivalent Action for the Salesforce Mobile App
Email	Send Email
Change Case Status	Update Case
Log a Call	Log a Call

The **Portal** action isn't available.

- There are some differences in behavior when using case Send Email actions.
 - The **CC** and **BCC** fields on the Send Email publisher aren't collapsible.
 - HTML isn't supported in Send Email actions on cases. If a Send Email action includes an **HTML Body** field, HTML markup tags don't appear in the Send Email publisher or in emails created from the action.
 - You can't include email attachments when using a case Send Email action.

- If a default email template is assigned to a case Send Email action, any attachments included in the template are ignored. The attachments don't appear in the Send Email publisher and aren't included in emails created from the action.
- Email drafts aren't supported on the mobile app.
- You can create cases comments if the Lightning app page is enabled for the mobile app. You can't edit or delete case comments. The Case Comments related list doesn't display the full text of comments that were added in the desktop site.
- These case related lists aren't available:
 - Business Hours on Holiday List
 - Solution List
- These case related lists are available if the Lightning app page is enabled for the mobile app:
 - Case Contact Role
 - Team Member List
 - Team Member on Team List
 - Team Template Member List

Entitlements and Milestones

Field Service

- In Salesforce for iOS:
 - You can't create service appointments, and the Recent related list isn't available.
 - You can't create service resources or absences, and the Recent related list isn't available on service resources or absences.
- On field service records created via a related list, the field that lists the parent record doesn't populate until you save the record. This issue applies to all versions of the Salesforce mobile app. For example, when you create a service appointment from the Service Appointments related list on a work order, the Parent Record field is blank until you tap **Save**. After the record is created, the parent record field lists the parent work order as expected.
- When an app user is working offline and offline sync permission isn't enabled, creating or updating records can cause an error if the Created Date or Last Modified Date fields appear to occur in the future.
- The dispatcher console—a Field Service managed package feature—isn't available in the Salesforce mobile app.
- The Linked Work Orders and Linked Work Order Line Items related lists on articles aren't available.
- Linked articles are read-only. You can search the Knowledge base and read attached articles, but you can't attach or detach articles. To manage linked article settings and attach or detach articles, use the desktop site.
- Linked articles can't be accessed from feed items.

Salesforce Knowledge Articles

Articles are supported in the Salesforce for Android and Salesforce for iOS apps, version 8.0 or later, with these limitations:

Issue	Android Downloadable App, v8.0 or later	iOS Downloadable App, v10.0 or later
Only published articles are available—not draft or archived articles.	✗	✗
Articles can't be created, edited, translated, or archived.	✗	✗
Articles can't be linked to cases. (But links that are set up from the desktop site can be viewed on the Related tab.)	✗	✗
Smart links aren't supported.	✗	✗
Article ratings aren't supported.	✗	✗
Tables are sometimes cut off on the right side when included in article rich text fields.	✗	
Compact layouts display the article type API name instead of the article type name. So users see the article type API name in the highlights area when viewing an article.	✗	✗
When searching from the Articles home page, only articles in the user's language are returned and only if that language is an active Knowledge language (from Setup, Customize Knowledge Knowledge Settings). To see articles in another language, users can change to an active Knowledge language. From My Settings , use the Quick Find search box to locate the Language & Time Zone page.	✗	✗
In global search, search results show articles in the language specified for the device, regardless of the active Knowledge language.	✗	
Filtering search results by data categories, article type, validation status, or language isn't available.	✗	✗
In global search, articles don't appear in the list of recent records.	✗	✗
In global search results, search highlights and snippets don't appear.	✗	✗
These features are available in all versions of the Salesforce mobile app when searching from the Articles home page.		
Knowledge articles aren't available when accessing Experience Cloud sites via the Salesforce mobile app.	✗	✗

Messaging

The Salesforce mobile app doesn't support Messaging on tablets.

Work Orders and Linked Articles

- Linked articles are read-only. You can search the Knowledge base and read attached articles, but you can't attach or detach articles. To manage linked article settings and attach or detach articles, use the desktop site.
- The Linked Work Orders and Linked Work Order Line Items related lists on articles aren't available.
- Linked articles can't be accessed from feed items.

Reports and Dashboards: What's Different or Not Available in the Salesforce Mobile App

Reports and dashboards have some limitations and differences in the Salesforce mobile app, such as the maximum number of rows displayed in reports, the absence of joined reports, and the inability to create, edit, or delete reports and dashboards. Dashboards have a single-column layout on phones and up to two columns on tablets, and report charts are only available after drilling into a dashboard component's report.

Reports

Considerations When Using Reports in the Salesforce Mobile App

Feature	Notes about Salesforce Mobile App Availability
Number of Rows Displayed	Reports display a maximum of 2,000 rows, same as on the desktop Salesforce site.
Groupings	When you view a report with groupings, the groupings are displayed as columns at the end of the report.
Report Formats	Summary reports, matrix reports, and tabular reports are available, but matrix and summary reports are shown in tabular format. Joined reports aren't available.
Conditional Highlighting	You can't view reports that show conditional highlighting.
Filters	When you open a report from the Reports tab, you can't filter the report. When you tap a dashboard component to open the source report, you can filter the report by tapping a value on the chart. If the source report is a tabular or joined report, then you can't filter it.

Report Features Not Available

- Create, edit, or delete reports
- Export
- Print
- Feed
- Schedule report refreshes
- Subscribe
- Joined reports
- Historical trend reports
- Add to campaign
- Role hierarchy
- Custom summary formula fields
- Folders
- Hide details
- Summary information (grand totals, subtotals, summarized fields, record counts, and so on)

Other Notes about Using Reports

- You can't drill into reports that have more than three checkbox fields.
- When you view a report with more than 25 summary fields, you receive an error message.
- The Salesforce mobile app can't render reports via URLs that use dynamic parameter values. If you modify a URL to pass parameters into reports, the app shows a blank screen (a report record with no returned results).

Dashboards

Considerations When Using Dashboards

Feature	Notes about Salesforce Mobile App Availability
View As	As in the desktop Salesforce site, you can only run dashboards as a user in your role hierarchy. However, in the Salesforce mobile app you can choose from all users in your organization. If you select a user outside your role hierarchy, you get an error.
Dashboard Layout	Dashboards display in a single-column layout on phones, and up to a two-column layout on tablets.

Dashboards Features Not Available

- Create, edit, or delete dashboards
- Feed
- Schedule
- Link from a dashboard component to a website or email address

- Visualforce components on dashboards
- Folders

Other Notes about Using Dashboards

In some situations, data displayed in a dashboard component can get out of sync with data in the report that's displayed on the same page. When a dashboard component's data doesn't match the report, one of these things is happening:

- The dashboard is being refreshed as the configured user or the running user, while a report is always run as the current user.
- The report was refreshed more recently than the dashboard. A report is refreshed every time you look at it (assuming you aren't working offline). But a dashboard component is refreshed only when the dashboard it belongs to is refreshed.

The same temporary mismatch can occur in the desktop site, but there you see reports and dashboard charts on separate pages. You see the report and the dashboard chart on the same page.

Charts

Other Notes about Using Charts

- Report Charts are only available after drilling into a dashboard component's report. Report charts aren't available from the Reports tab.
- Embedded report charts don't link to the source report.

Salesforce Files: What's Different or Not Available in the Salesforce Mobile App

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

 **Important** Chatter must be enabled for your org to view, open, and upload files.

When using Salesforce Files in the Salesforce mobile app, you can't:

- Add more than one file to feed items in Chatter
- See multiple files attached to a feed item in the main Chatter feed—only the first attachment is displayed (*Salesforce for Android only*)
- View file types other than: .doc, .docx, .pdf, .ppt, .pptx, .xls, .xlsx, and all image files, including .gif, .jpg, and .png formats
- Create, rename, or delete library folders
- Share a file you have Viewer access to
- Move files in libraries into folders
- Access Files from the navigation menu if you're a high-volume portal user
- Upload files using the Good Access secure mobile browser

- Assign topics to files in the main Chatter feed (*downloadable apps only*)

Content Libraries and Files

The support for Salesforce CRM Content in the Salesforce for iOS is geared towards letting users view and share content. Other activities, such as managing or contributing to libraries, aren't available in the app. Here's how working with content libraries is different from what users can do in the desktop site.

- The Private Library folder isn't available. Instead, a user can access the files in their private library by selecting the Owned by Me filter in the Files list on Files home.
- When viewing libraries, the top content, popular tags, recent activity, and most active contributors sections aren't available.
- Users can't:
 - See content detail pages
 - Upload and publish new or revised files to libraries
 - Publish web links in libraries
 - Edit content details
 - Add, edit, or delete comments
 - Delete files (Salesforce for iOS and Salesforce for Android)
 - Move files to different libraries
 - Use tags to classify or filter content
 - Subscribe to libraries, files, authors, or tags
 - Provide feedback on content, or review feedback on content
 - Delete, archive, or restore content
- Content search options like filtering by file type, author, or library name aren't available. But users can use global search to find files in libraries.
- Creating or managing content deliveries isn't available, including generating an encrypted URL for sharing files and content packs with customers.

Chatter: What's Different or Not Available in the Salesforce Mobile App

Learn about Chatter functionality in Lightning Experience on desktop that isn't available or that works differently in the Salesforce mobile app.

Feeds

When viewing feed items in the Salesforce mobile app, you can't see:

- Live feed or live comment updates.
- Rich text formatting or code snippets in the main feed.
- Inline images in the main feed—you see a placeholder with the name of the image instead. (*Salesforce for Android only*)
- Multiple attachments on an item in the main feed—only the first attachment is displayed.
- Previews of links in the main feed.

- Bundled posts in the What I Follow feed.
- Social feed posts.
- The full content of posts shared from Lightning Experience when viewed in the main Chatter feed.
- The full content of posts shared from Lightning Experience when viewed in feeds on profiles.
(Salesforce for iOS only)



Note To see the shared content, tap the **View Post** link in the shared feed item.

When posting, commenting, or doing other work in feeds from the Salesforce mobile app, you can't:

- Apply rich text formatting or include code snippets in feed items.
- Add more than one attachment to feed items.
- Edit posts that include rich text, inline links, or inline images.
- Share posts.
- Search in feeds on user profiles and records.

There are some other features that aren't available in Chatter in the Salesforce mobile app. You can't:

- Switch the main feed to show only muted posts.
- Filter the main feed to show all updates, fewer updates, questions, or only posts related to a specific object.
- Send or view Chatter messages.
- See recommendations.
- Add or view Chatter favorites.
- See Chatter activity statistics or Chatter influence status.
- Invite coworkers to sign up for Chatter.
- Receive Chatter push notifications if you're an external user.

Topics

When using topics, you can't:

- See trending topics.
- Edit topic details (name and description).
- Tag favorite topics.
- Assign topics to records.
- See the Related Topics and Knowledgeable on Topics related lists.
- See topics in auto-complete options when searching using hashtags.

Chatter Questions Mobile Limitations

When using Chatter Questions, you can't:

- See similar questions and knowledge articles when you ask questions.
- Select best answers.

Chatter Questions isn't fully supported in the Salesforce mobile app. When coworkers ask questions, you

can see who posted but the text of the question isn't displayed. You can see any answers to the question, however.

Groups

When using groups, you can't:

- See live feed updates.
- Invite customers to join private customer groups.
- Add records to Chatter groups with customers using the **Add Record** action.
- Withdraw requests to join private groups.
- Change email and in-app notification settings for groups in Experience Cloud sites.
- See or customize group member engagement data.
- Share files with a group unless you're a member or admin (iOS only)

Group owners and managers can't remove files from the group files list.

People and Profiles

When using People to view profiles, you can't:

- Edit profile information in Salesforce for iOS.
- Upload a profile photo using the Good Access™ secure mobile browser.
- Hover on user profile photos to quickly see user information.
- Use custom profiles.
- Filter the Following related list on your profile.

Experience Cloud Sites: What's Different or Not Available in the Salesforce Mobile App

Experience Cloud sites in the Salesforce mobile app are similar to the Lightning Experience desktop site, with some differences.

- The navigation menu for an Experience Cloud site doesn't include all the items that are available to your internal org:
 - The navigation menu shows only the tabs that the admin has included in that site via Tabs & Pages in the site's administration settings.
 - The Events and Today items aren't available and don't appear in the navigation menu.
 - Tasks are available only to users with the Edit Tasks permission.
 - The Reports item isn't available and doesn't appear in the navigation menu.
- There's no All Company nor Company Highlights feed.
- Adding inline images to a post isn't available.
- Experience Management and Experience Workspaces aren't available.
- Site.com branding isn't supported.
- Members can't flag private messages as inappropriate.

- Reputation isn't supported. However, if reputation is enabled and set up in the desktop site, users do accrue points when using the Salesforce mobile app. Users can view their points in the desktop site only.
- Search is scoped to the Experience Cloud site and returns only items from the current site. The only exception is records, since they're shared across sites and the internal org.
- Role-based external users can approve and reject approval requests from the Approval History related list on records, but they can't submit requests for approval.
- A user's list of notifications includes notifications from all Experience Cloud sites the user is a member of. The name of the site in which the notification originated appears after the timestamp.
- External users accessing Experience Cloud sites don't see a help link.
- Photos appear next to users' names in the People list.
- The Experience Builder template and your user licenses determine how you can access Experience Cloud sites. For more information, see *Access Experience Cloud Sites in the Salesforce Mobile App* in Salesforce Help.
- Group members in Experience Cloud sites can't edit their email and in-app notification settings. As a workaround, users can set their group email notification preference to **Every Post** in the site from the desktop site. Selecting this option enables both email notifications and in-app notifications for that group.
- Push notifications for Experience Cloud sites aren't supported in the Salesforce mobile app. Their navigation and authentication behavior can vary for members with both an internal and external login or multiple external logins. We recommend that users with multiple logins access a site from a supported mobile browser using the site URL. In a mobile browser, site users receive notifications via the bell icon and notification tray.
- Direct message notifications aren't supported in mobile sites. If a user receives a direct message while using the mobile website, the bell notification doesn't display a new message.
- Experience Cloud sites aren't available when the mobile device is offline.
- The Experience Cloud site's Related List - Single component isn't supported for Files.
- The Record Headline component doesn't support Chatter actions or field labels.
- You can't create a record from a lookup field.

Navigation and Actions: What's Different or Not Available in the Salesforce Mobile App

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

Navigation

- On mobile devices, the Salesforce mobile app is supported in portrait orientation only. In Spring '23, an opt-in beta allows for use of the Salesforce Mobile App in landscape orientation, with numerous known issues.
- When using Salesforce for Android and Salesforce for iOS on tablets, both portrait and landscape orientation are supported.
- The mobile browser app interface does rotate into landscape orientation but isn't guaranteed to work in this orientation.

- The Lightning Experience utility bar isn't available in the Salesforce mobile app.

Actions

- Most actions, including quick actions, productivity actions, and standard and custom buttons, are displayed in the action bar in the Salesforce mobile app.
- The Save & New action button isn't available in the Salesforce mobile app.
- The Delete action is available on record pages only, not record detail pages.
- In most cases, a productivity action displays only if a record includes the information that the action is keyed to. For example, the Send Email action depends on the record including an email address. The View Website action requires the record to include a website URL. On accounts, the Call action appears even when there isn't a phone number on the record.
- By default, the Call productivity action in the mobile app action bar uses the global Log A Call action layout. If you create one Log a Call action on an object, users see that custom Log a Call action's layout when they tap **Call** from the action bar for that object. If you create more than one Log a Call action for the same object, the Call action on that object doesn't know which layout to use, so it uses the global Log a Call action layout.
- There are a few differences between the Send Email quick action in Salesforce and the standard Email action in Case Feed:
 - Users can't switch between the rich text editor and the plain text editor in a Send Email action.
 - Templates aren't supported in the Send Email action.
 - Quick Text isn't available in the Send Email action.
 - The Send Email action doesn't support attachments.
 - Users can't save messages as drafts when using the Send Email action.
 - Users can't edit or view the From field in the Send Email action.
- If feed tracking isn't enabled on an object, only nonstandard actions appear in the Salesforce mobile app action bar and in third-party apps that use action lists. Nonstandard actions include Create, Update, Log a Call, custom actions, and Mobile Smart Actions.
- If you're using record types in your org, some quick actions might not be visible to your users. For more information, see [Quick Actions and Record Types](#).
- The Mobile Smart Actions element appears as a single action element in the page layout editor, but it expands to several actions when it displays in the Salesforce mobile app. If the Mobile Smart Actions element is in the Quick Actions in the Salesforce Classic Publisher section, and you then customize the action bar section, the actions in the app are derived from the action bar customizations you make. In this case, the Mobile Smart Actions element in the Quick Actions in the Salesforce Classic Publisher section becomes irrelevant.
- To customize the actions in the Salesforce mobile app action bar for standard and custom objects, first override the predefined actions. You can then add or remove actions from the Salesforce Mobile and Lightning Experience Actions section.

For instance, to move the Join Group, Edit Group, or Leave Group actions on groups in the Salesforce mobile app, override the predefined actions in the Groups page layout.
- Using URL custom buttons to pass parameters to standard pages in Salesforce Classic—such as pre-populating fields when creating a record—doesn't work in the Salesforce mobile app.
- If you add a custom button to the Salesforce Mobile and Lightning Experience Actions section of a page layout, the icon for that custom button in the Salesforce mobile app action bar is a lightning bolt.

If the Salesforce Mobile and Lightning Experience Actions section isn't customized, the icon of that custom button in the app action bar is a wrench.

Search: What's Different or Not Available in the Salesforce Mobile App

Global search in the Salesforce mobile app uses the same search index as Lightning Experience and Salesforce Classic, so you always search the same data.

You also see the same set of recently accessed records in instant results. The search scope (the list of objects you use the most) influences search results, but some standard objects aren't available in the Salesforce mobile app. You don't always see the exact same search results. Also, the scope for mobile searches and the desktop is independent, so searches on one platform don't affect the results you see on the other. And the global search interface is different, so there are visual and navigational differences to consider.

Search Features	The Salesforce mobile app supports personalization, natural language search, and recommended results.
Instant Results	<ul style="list-style-type: none">Instant results show in a dropdown menu below the search box. They include recent items and matching records. If you don't see a record in instant results, perform a full search by tapping the Search for option.The mobile app doesn't support actionable instant results.
Search Results	<ul style="list-style-type: none">For Salesforce for iOS, global search returns results for the first 155 characters of your search term. Feed search returns results for the first 100 characters. For Salesforce for Android, search returns results for entire search term, regardless of the number of characters.External results for federated search objects aren't available. However, you can add custom objects created for federated search to the navigation menu.List views aren't included in search results.Full search results, which you see when you enter text in the search bar then tap Search or the Search for option, show Top Results. Top Results lists the top three records for the objects you use the most. Results are grouped by object and sorted by relevance.To view results for specific objects, tap the object name in the search scope bar beneath the search box.You can't sort search results.You can't filter search results. Search filters that are added to URLs are also unsupported.Global search allows you to infinitely scroll through results across all objects.Search results show the first five fields from the search layout.The Recommended Results is highlighted at the top of the search results, but

	record previews and actions aren't available.
Lookup Searchers	Lookups are supported on the Salesforce mobile app. The lookup experience can vary depending on which feature you're using, so review the documentation for the feature.
Chatter Feed Searches	Use the Chatter feed search and not the global search. Global search doesn't find information in feeds.

Entering Data: What's Different or Not Available in the Salesforce Mobile App

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

There are some differences between Lightning Experience desktop and the Salesforce mobile app when you're adding new records or updating existing data.

Category	Issue	Creating Records	Editing Records
Any Record	Third-party keyboards aren't supported.	✓	✓
	Inline editing isn't available.	✓	✓
	Changing a record's owner is available for accounts, campaigns, cases, contacts, leads, opportunities, work orders, and custom objects only.		✓
	Combo boxes, which combine a picklist with a text field, aren't available. Typically the text field is available but the picklist isn't .	✓	✓
Accounts and Contacts	The Copy Billing Address to Shipping Address and Copy Mailing Address to Other Address links aren't available.	✓	✓
Events	If two or more contacts are related to an event, the owner can't edit them. If the event has just one related lead or contact, the owner can edit it but not add more.		✓
	Events that aren't related to a contact or object aren't displayed.	✓	✓
	You can't accept or decline an event you've been invited to.		✓
	You can't use Shared Activities to relate multiple contacts to an event.	✓	✓
	The Related To field remains editable when the Name field is set to	✓	✓

Category	Issue	Creating Records	Editing Records
	Lead, but you receive an error if the Related To field contains data when you save the record.		
	The Subject field doesn't include a picklist of previously defined subjects.	✓	✓
	The Email and Phone fields for an associated contact aren't displayed.	✓	✓
	You can't add attachments.	✓	✓
	You can't send notification emails.	✓	✓
	You can't set event reminders.	✓	✓
Leads	When you add a lead, the Campaign field and the Assign using active assignment rule checkbox aren't available. You can add values to these fields in the desktop site.	✓	
Opportunities	You can't edit the Forecast Category field. The field is automatically populated, based on the value of the Stage Opportunities field, when you save the record. Opportunity owners can manually edit the value of this field in the desktop site.	✓	✓
Tasks	If admins turn on the Show simpler New Task form on mobile setting in Setup, the Subject field doesn't include a picklist of previously defined subjects. If the setting is turned off, the Subject picklist is included.	✓	✓
	The Related To field remains editable when the Name field is set to Lead, but you receive an error if the Related To field contains data when you save the record.	✓	✓
	The Email and Phone fields for an associated contact aren't displayed.	✓	✓
	You can't use Shared Activities to relate multiple contacts to a task.	✓	✓
	You can't create recurring tasks using a New Task quick action, but you can via the New Task button on task lists.	✓	✓
	You can't edit the recurrence details of a recurring task series.		
	You can't add attachments.	✓	✓
	You can't send notification emails.	✓	✓
	You can't set task reminders.	✓	✓

Category	Issue	Creating Records	Editing Records
Phone Number Fields	The keypad that displays in phone number fields doesn't include parentheses, hyphens, or periods, and doesn't apply any phone number formatting when you save the record. To apply a specific phone number format, edit the record in the full site.	✓	✓
Success Message	After creating a record from a related list in the Salesforce mobile app, the resulting success message doesn't include a link to the new record (like in Lightning Experience).	✓	
Service Appointments	By default, you can't edit the status of a service appointment using the Salesforce mobile app.		✓
Clone with Related	Clone with Related isn't available in the Salesforce mobile app.		

Approvals: What's Different or Not Available in the Salesforce Mobile App

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

Approval Responses

You can't unlock a record that's locked for approval.

Salesforce Mobile App Notifications for Approval Requests

- Notifications for approval requests aren't sent to queues or delegates. For each approval step involving a queue, add individual users as assigned approvers, so those individuals can receive the approval request notifications in the mobile app. To have both queues and individual users as assigned approvers, select **Automatically assign to approver(s)** instead of **Automatically assign to queue** in the approval step.
- Notifications for approval requests are sent only to users who have access to the record being approved. Assigned approvers who don't have record access can receive email approval notifications, but they can't complete the approval request until someone grants record access.

Approvals in Chatter

In the Salesforce mobile app, you can't respond to approval requests from Chatter. To respond to approval requests, go to the Approvals navigation item.

Approval Comments

- The Salesforce mobile app prompts you for comments after you tap Approve or Reject.
- The Approval History related list displays truncated comments. To see the full comment for a given approval instance, tap the instance, then tap **Comments**.

Approval History Related List

- The Approval History related list doesn't include the Submit for Approval button.
- When working with approvals in Experience Cloud sites, role-based external users can see and take action from the Approval History related list, but they can't submit requests for approval.

Offline Access: What's Different or Not Available in the Salesforce Mobile App

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

Access Data While Offline

When caching is enabled, Salesforce for Android and Salesforce for iOS users can access cached data while working offline.

The default data that's cached includes recently accessed records for the five most recently used objects, plus the user's recent tasks and dashboards. Recently accessed records are determined by a user's activities in both the Salesforce mobile app and the Salesforce desktop site, including Salesforce Classic and Lightning Experience. In addition, much of the data that a user accesses throughout a Salesforce session is added to the cache.

Update Data While Offline (Beta)

Differences between the Salesforce desktop site and the Salesforce mobile app when updating data while offline.

Create, Edit, and Delete Actions

- Create records using the **New** button on recently accessed object home pages. New record actions in an action bar (such as **New Task**, **New Contact**, or **New** on related lists) aren't supported offline.
- **Edit** and **Delete** actions in the action bar are available for cached records only.

All Other Quick Actions

- All other action bar icons, such as **Log a Call**, **Post**, or **Change Owner**, aren't supported offline.

Record Types for Recent Objects

- Salesforce caches up to 30 of a user's most recently accessed record types per object. If your org has defined more than 30 record types for any of a user's recent objects (that is, the user's five most recently used objects), only the cached record types are available when creating a record offline. And only records matching the cached record types are editable while offline.

Lookups and Picklists

- Dependent lookups and picklists for a cached record aren't supported when offline, unless the user interacted with these elements before the record was cached.
- Lookup filters aren't supported when offline. Users can enter the name of the related lookup record when editing data offline but the app doesn't search for related looked records until the user's mobile device is back online.
- Complex page layouts, with many fields or picklists, can result in records that are too large to cache. If a user doesn't see expected recently accessed records when offline, this situation might be the reason why. We recommend reevaluating the affected object's page layout to see if you can optimize it for mobile use.

Notes

- Notes that include images aren't available offline.
- Images can't be added to notes when working offline.
- Users can't relate notes to records when working offline.

Events

- If you create an event when working offline, it is in draft mode until Salesforce is back online. However, there's no visual cue on the Events list that the event is still in draft mode.

Tasks

- Users can only create tasks offline if the simplified New Task form on mobile is disabled. From Setup, enter *Activity Settings* in the **Quick Find** box, then select **Activity Settings**. Deselect **Show simpler New Task form on mobile** and click **Submit**.
- Selecting or deselecting checkboxes on tasks isn't supported when offline.

Experience Cloud Sites

- Experience Cloud sites aren't supported when offline.

Salesforce Customization: What's Different or Not Available in the Salesforce Mobile App

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

Custom Home Pages

- The Salesforce mobile app doesn't support login redirection to other Salesforce apps or custom home tabs like the Salesforce desktop site does.
- Avoid overriding the `startURL` in the login request. Because the `startURL` includes links to the redirect URI and approval page, overriding the `startURL` breaks the OAuth flow.

Custom Buttons and Links

- Custom buttons that are added to the Button section of a page layout and that define the content source as `URL` or `Visualforce` are supported in the Salesforce mobile app. Remember that Visualforce pages must be enabled for use in the Salesforce mobile app.
Custom links, custom buttons that are added to list views, and custom buttons that define the content source as `onClick JavaScript` aren't available in the Salesforce mobile app.
- Using URL custom buttons to pass parameters to standard pages in Salesforce Classic—such as pre-populating fields when creating a record—doesn't work in the Salesforce mobile app.
- Custom images used for action icons must be less than 1 MB in size.

Custom Help

- The Help Menu isn't supported in the Salesforce mobile app.
- In-App Guidance isn't supported in the Salesforce mobile app.
- The Guidance Center isn't supported in the Salesforce mobile app.

Lightning Pages

- Pull to refresh doesn't work for custom Lightning web components in the Salesforce mobile app.
- Changes that you make to Lightning record page assignments aren't immediately reflected in the Salesforce mobile app. To see a newly assigned record page, close and restart the Salesforce mobile app.

Programmatic Customizations

- These programmatic customizations to the UI aren't supported: S-controls.

Salesforce Mobile App Considerations for Tablets

Learn about the layout and special considerations for using the Salesforce mobile app on tablets.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: both Salesforce Classic and Lightning Experience

Setup available in Salesforce Classic in: all editions except **Database.com**

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

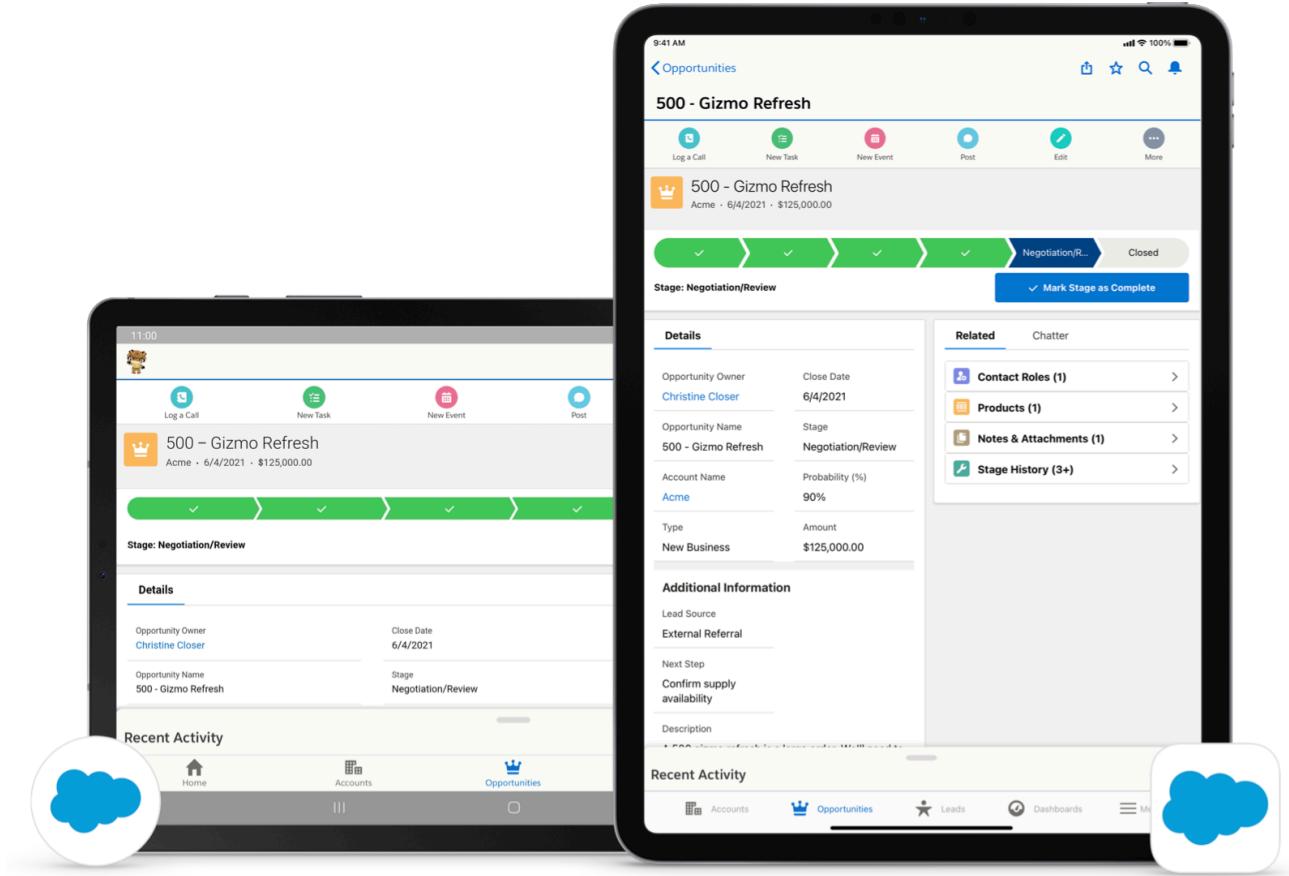
Lightning on Tablet

The full-width Lightning on tablet experience is performance-tuned for tablet users. It supports Lightning apps, navigation, record pages, rotation between portrait and landscape modes, and design time previews in Lightning App Builder. The new tablet experience runs on all currently supported iPad models and many Android tablet models.

In Winter '22, the full-width tablet experience became the default tablet experience for *new* organizations. As of Spring '23, all organizations default to Lightning on tablet.

The key features include

- Lightning Apps that were previously built and activated for mobile phones are instantly useable in this experience.
 - Lightning app pages and record pages that are activated for mobile phones work seamlessly on tablet. Lightning on Tablet also respects component visibility rules for the phone form factor.
 - Mobile-specific components were tested and confirmed working in the new tablet experience.
- Lighting App Builder has been enhanced with support for tablets.
 - Preview record and app page layouts using Tablet (Landscape) or Tablet (Portrait) mode.
 - Analyze your app's performance using the new tablet-specific guidance built into the Page Analysis tool
- Rotation between landscape and portrait mode is supported on both iPad and Android tablets and page layouts are automatically adjusted.



Custom Component Considerations for Lightning on Tablet

- If you have custom components on mobile, it's recommended that you test them on tablets to verify layout and functionality.
 - For custom Lightning web components logic, import **FORM_FACTOR** from '@salesforce/client/formFactor' and check against **MEDIUM** to test if the component is rendering on a tablet.
- ⚠️ Warning** **MEDIUM** form-factor for components isn't officially supported, but logic checks against **MEDIUM** form-factor to change behavior for tablet can work. If a custom page or component is activated on **SMALL** form-factor (phone), it renders on tablet (**MEDIUM**) by default.
- For custom Aura components logic, if you want to add special logic for tablet, use:

```
$A.get("$Browser").isTablet
```

For mobile use cases, use:

```
!$A.get("$Browser").isDesktop
```

Known Component Issues

- Surveys components don't render correctly on the tablet and aren't certain to be supported on mobile in the future.

- Task List View component doesn't function properly on the tablet. To work around this issue, use Task Home instead.
- Some Commerce Cloud components such as campaignTileList don't render correctly on the tablet and aren't certain to be supported on mobile in the future.

Have you tried the new Lightnight on tablet experience? Send feedback to tablet-feedback@salesforce.com.

Lightning Experience on iPad Safari

As of Summer '20, the mobile website experience isn't supported.

If you have iPad users, Lightning Experience on iPad Safari is another way to use Salesforce on the go. To get started, check out [Technical Requirements for Tablets](#). You can also learn more about iPadOS and how it affects Salesforce in the knowledge article, [Salesforce on the New iPadOS Operating System](#).

Salesforce Mobile App Accessibility Considerations

The Salesforce mobile app provides users working with screen readers and other accessibility features a fully accessible mobile experience. If you use the Salesforce mobile app with an assistive device, keep these tips in mind.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: both Salesforce Classic and Lightning Experience

Setup available in Salesforce Classic in: all editions except **Database.com**

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

The Salesforce mobile app works with all the accessibility features built into your mobile device, including VoiceOver and AssistiveTouch on iOS devices and TalkBack and Explore by Touch on Android devices. The following, however, are known issues that affect those accessibility features.

If you're using assistive technology on an iOS device, consider these known issues:

- When VoiceOver is enabled, three-finger scrolling isn't available on some pages. In this case, use the buttons on the top and bottom of the screen to scroll vertically and the buttons on the left and right of the screen to scroll horizontally.
- Using pinch and spread to zoom isn't currently supported. To zoom, use the iOS zoom function.
- On Android devices, a two-finger swipe on any page triggers a refresh of that page.
- On iOS devices, a three-finger swipe scrolls the page up and down. To refresh the page, activate the refresh button using VoiceOver.

Salesforce Mobile App Language Considerations

The Salesforce mobile app gets language support from the language and region settings on the mobile device, the language setting for the mobile device's default browser, and the language and region settings in the user's Salesforce user profile. If these settings differ, users can see different languages in the app.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: both Salesforce Classic and Lightning Experience

Setup available in Salesforce Classic in: all editions except **Database.com**

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

For example, the language used in a menu in the Salesforce mobile app could be different from the language used in a Chatter feed in the mobile app. That's because the menu and the feed get language support from different places.

If you're seeing different languages in the mobile app, check the language and region settings on your mobile device, the language setting in your mobile device's default browser, and the language and region settings in your Salesforce user profile.

Set Up the Salesforce Mobile App

Learn more about device requirements and access to get the most out of the Salesforce mobile app.

Requirements for the Salesforce Mobile App

The Salesforce mobile app is available for most Salesforce editions and user license types. The app is supported on various mobile platforms, both phone and tablets, with some minimum operating system requirements.

Control Access and Security for the Salesforce Mobile App

By default, all users in your organization can log in to Salesforce for Android and iOS. However, you can control access to all versions of the Salesforce mobile app and configure security policies through a mix of settings and connected app attributes.

Salesforce Mobile App Notification Types

Keep users up to speed on important events in Salesforce and engaged with their workflow with notifications.

Message Customers in the Salesforce Mobile App

Modernize your communication by letting agents message customers from the Salesforce mobile app. Agents who use enhanced messaging channels or Enhanced Chat can chat with customers on the go.

Requirements for the Salesforce Mobile App

The Salesforce mobile app is available for most Salesforce editions and user license types. The app is supported on various mobile platforms, both phone and tablets, with some minimum operating system requirements.

REQUIRED EDITIONS

The Salesforce mobile app available in: all editions except **Database.com**

Mobile Platform Requirements

The Salesforce mobile app is supported on phones and tablets that meet these mobile platform requirements.

Operating System and Version Requirements

Android 11.0 or later, Android WebView 90.0 or later

iOS 17.0 or later

To allow for innovation and to keep Salesforce current in the rapidly evolving mobile market, minimum platform requirements are subject to change at the sole discretion of Salesforce, with or without advance notice.

Mobile Devices Used for Testing

Salesforce performs automated and manual testing of the Salesforce mobile app for iOS and Android on a select set of mobile devices. Salesforce periodically updates our test devices based on usage and new device releases. Here's the current list of devices.

Platform	Phones	Tablets
Android	<ul style="list-style-type: none">Pixel 10Pixel 9 / 9 ProPixel 7 / 7 ProSamsung Galaxy S24 UltraSamsung Galaxy S23/23 UltraSamsung Galaxy S22/22 UltraSamsung Galaxy S21Samsung Galaxy S20 / S20+	<ul style="list-style-type: none">Samsung Galaxy Tab S6Samsung Galaxy Tab S7Samsung Galaxy Tab A (8 inch)

Platform	Phones	Tablets
iOS	<ul style="list-style-type: none"> • iPhone 17 Pro / Pro Max • iPhone 17 / iPhone 17 Air • iPhone 16 Pro / Pro Max • iPhone 16 / 16 Plus • iPhone 15 Pro / Pro Max • iPhone 15 / 15 Plus • iPhone 15 Pro / Pro Max • iPhone 14 Pro / Pro Max • iPhone 14 / 14 Plus • iPhone 13 Pro / Pro Max • iPhone 13 • iPhone 12 Pro / Pro Max • iPhone 12 • iPhone XR • iPhone 11 • iPhone SE 	<ul style="list-style-type: none"> • iPad Pro (10.5 inch - 12.9 inch) • iPad Pro (9.7 inch, 6th generation and later) • iPad Air 3rd Gen • iPad Mini 5th Gen

Using the mobile app on untested devices can lead to various functional and performance issues. Salesforce may not be able to replicate specific issues on untested devices or due to manufacturer-specific customizations. In certain situations, Salesforce may not be able to resolve a specific issue on untested devices which can lead to downtime and production impact.

-  **Note** Salesforce treats touch-enabled laptops, including Microsoft Surface and Surface Pro devices, as laptops instead of tablets. It's not possible to access the Salesforce mobile app on these devices. Users are always redirected to the full site experience that's enabled for them—Lightning Experience or Salesforce Classic. Only standard keyboard and mouse inputs are supported on these types of devices.

Support for Siri Shortcuts on iOS

The Salesforce mobile app contains pages that are directly run by the app—native pages such as standard object home pages or search—and pages that are webviews. Siri learns what shortcuts are available in the Salesforce app through donations that the app makes to Siri. For Salesforce to donate a shortcut for a specific dashboard, we must receive the title and record name of the dashboard. Because of this requirement, you can use pages for Siri shortcuts only if they're accessed from a native page. However, it doesn't show up as an available shortcut until you've gone to that record page from a native page. The best way to set up a shortcut is to search for the page and visit it from search results.

Salesforce Editions and Licenses

See which Salesforce editions and user license types support using the Salesforce mobile app.

Salesforce Editions	
Salesforce is available in these editions:	But not in these editions:
<ul style="list-style-type: none">• Personal Edition• Group Edition• Essentials Edition• Professional Edition• Enterprise Edition• Performance Edition• Unlimited Edition• Developer Edition• Contact Manager Edition	<ul style="list-style-type: none">• Database.com Edition
User License Types	
These user license types can access the Salesforce mobile app. A special mobile license isn't required.	These user license types don't have access to the mobile app:
<ul style="list-style-type: none">• Salesforce users• Salesforce Platform and Lightning Platform users• Chatter Plus users (also known as Chatter Only), Chatter Free users, and Chatter External users *• Customer Community, Customer Community Plus, and Partner Community external users• Portal users who are a member of a Salesforce community	<ul style="list-style-type: none">• Portal users (unless a member of a Salesforce community)• Database.com users• Sites and Site.com users• WDC users

 **Note** You can access the same data and functionality that's available to you in the full site, as determined by your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets.

Network

A Wi-Fi® or cellular network connection is required to communicate with Salesforce. For cellular connections, a 3G network or faster is required. For the best performance, we recommend using Wi-Fi or LTE.

In the Salesforce mobile app, you can view your most recently accessed records, and create and edit records, when your device is offline.

Salesforce doesn't provide support or recommend an implementation involving a reverse proxy. Issues that arise from the use of a reverse proxy and the Salesforce mobile app aren't supported. If customers encounter issues with the app, they must perform due diligence and isolate such issues outside of the reverse proxy integration.

Salesforce Mobile App Updates

Customers whose devices meet current minimum platform requirements are eligible to receive Salesforce mobile app feature updates and fixes.

Our goal is to release Salesforce mobile feature and functionality updates to coincide with each Salesforce major release. This information is provided to help with your release planning, but is subject to change at Salesforce's discretion.

Enhanced features and functionality are provided in major version updates. We aim to release a new major version of the Salesforce mobile app for iOS and Android after the completion of each Salesforce major release to all production instances. The timeframe in which a new major version is released varies and can be affected by factors outside of Salesforce's control, including new requirements from Apple or Google or changes to the iOS or Android operating systems.

Customers can install new versions from the App Store and Google Play as long as their mobile devices meet Salesforce's current minimum mobile operating system requirements. If a device is running an older operating system, updated versions of the Salesforce mobile app don't appear in the App Store or Google Play.

Customer Support Services for Salesforce

Salesforce Customer Support uses commercially reasonable efforts to troubleshoot issues with the Salesforce mobile app, provided:

- A user's device meets current minimum platform requirements
- Users have the most recent version of Salesforce for iOS or Android installed

When customers run the Salesforce mobile app on Salesforce-tested devices, it's more efficient for us to troubleshoot issues. For customers using untested devices, even those meeting minimum platform requirements, we might not be able to replicate some issues due to device manufacturer-specific customizations.

Running the Salesforce mobile app on older devices or devices with low computation and memory capabilities can adversely affect performance, compared to performance on Salesforce-tested devices.

We might not be able to predict or replicate the behavior of beta versions of operating systems, so we support the Salesforce mobile app on generally available (GA) versions of iOS and Android only.

Because we enhance functionality with every release, we support the latest version of the Salesforce mobile app available in the App Store and Google Play only.

Control Access and Security for the Salesforce Mobile App

By default, all users in your organization can log in to Salesforce for Android and iOS. However, you can control access to all versions of the Salesforce mobile app and configure security policies through a mix of settings and connected app attributes.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: both Salesforce Classic and Lightning Experience

Setup available in Salesforce Classic in: all editions except **Database.com**

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS NEEDED

To edit your Salesforce for Android and Salesforce [Customize Application](#)
for iOS settings:

To view your Salesforce for Android and Salesforce [View Setup and Configuration](#)
for iOS settings:

Settings

You can enable and disable onboarding tips, feedback, and the importing of contacts from the Salesforce Settings page. These settings apply to your full org.

From Setup, enter *Settings* in the Quick Find box, then select **Salesforce Settings**.

Connected Apps

You can control security and access for Salesforce for Android and Salesforce for iOS using settings components that are installed from the managed Salesforce connected apps package. You can view and edit the settings for each of the apps, including controlling user access with profiles, permissions, and IP range restrictions, from the Manage Connected Apps page.

The Salesforce for Android and Salesforce for iOS components are automatically installed when one of your users installs the Salesforce mobile app from the App Store or Google Play on a mobile device and authenticates with your organization by logging in to the Salesforce mobile app. Alternatively, you can manually install [Salesforce and Chatter Apps connected apps package](#) so you can review and modify the default security and access settings before rolling out the Salesforce mobile app to your users.

From Setup, enter *Connected Apps* in the Quick Find box, then select **Manage Connected Apps**. Click **Edit** for the app you want to modify.

Connected App Attributes

You can use connected app custom attributes to manage in-app security policies, such as disabling copying and pasting from the Salesforce mobile app. Several of the Salesforce mobile app custom attributes have a default value that automatically applies when a user logs in to Salesforce for Android or Salesforce for iOS. If the values are appropriate for your org, you're all set.

To change a default value, or configure an attribute that doesn't have a default setting, go to Setup. Enter *Connected Apps* in the Quick Find box, select **Manage Connected Apps**, then click the name of the connected app you want to modify. In the Custom Attributes section on the connected app page, click **New** and enter the attribute name and value.

 **Important** Remember to wrap attribute values in quotation marks.

Attribute Key	Attribute Value	Platform	Description
<code>DISABLE_ACTIVITY_TIMELINE</code>	<ul style="list-style-type: none"><code>TRUE</code><code>FALSE</code>	iOS	<ul style="list-style-type: none">If set to <code>TRUE</code>, disables the mobile activity timeline on supported record types.If set to <code>FALSE</code>, enables the mobile activity timeline for leads, opportunities, accounts, and contacts. On these record types, iOS users can view all of the tasks, events, and emails associated with a record in one convenient feed.
<code>DISABLE_EXTERNAL_PASTE</code>	<ul style="list-style-type: none"><code>TRUE</code><code>FALSE</code>	Android, iOS	<ul style="list-style-type: none">If set to <code>TRUE</code>, disables copying and pasting within and outside of the Salesforce mobile app.If set to <code>FALSE</code> (default if attribute value isn't defined), lets users copy and paste

Attribute Key	Attribute Value	Platform	Description
			<p>within and outside of the Salesforce mobile app.</p> <ul style="list-style-type: none"> The <code>DISABLE_EXTERNAL_PASTE</code> attribute doesn't affect Share extensions on iOS.
<code>ENABLE_SHARE</code>	<ul style="list-style-type: none"> <code>TRUE</code> <code>FALSE</code> 	Android, iOS	<ul style="list-style-type: none"> If set to <code>TRUE</code> (default if attribute value isn't defined), lets users share a direct link to a page via the share icon. If set to <code>FALSE</code>, removes the share icon from all shareable pages in the Salesforce mobile app.
<code>FORCE_EMAIL_CLIENT_TO</code>	<p>The email app's URI scheme. Can differ by platform. For example, here's an Android URI scheme example for Blue Mail, and an iOS URI scheme example for Gmail.</p> <p>Android:</p> <pre><code>https://play.google.com/ store/apps/details?id= =me.bluemail.mail&hl=</code></pre> <p>iOS:</p> <pre><code>googlegmail:///co?to=</code></pre>	Android, iOS	<p>If a user taps on an email action in the Salesforce mobile app, the user is directed to the email app specified in the attribute value.</p> <p>You can specify one email app only.</p> <p>The attribute value you enter depends on the email app and the device platform.</p> <ul style="list-style-type: none"> For Android, use the URI listed in the Google Play Store for the desired email app. For iOS, do an Internet

Attribute Key	Attribute Value	Platform	Description
			<p>search to locate the URI scheme for the desired email app. For example, search for <i>iOS Mail URI scheme</i>.</p> <ul style="list-style-type: none"> On 3D Touch® devices, a user is able to select from all available email clients when they touch and hold an email address on Visualforce pages and record pages.
HIDE_SEARCH_ICON_FOR_LIGHTNING_APP	<ul style="list-style-type: none"> “APP_NAME_1,APP_NAME_2” The value is a string wrapped in quotes containing one or more lightning app developer names, separated by commas. Don't include spaces. <p>Example value: "gCRM_Relationship_360,GC RM_Global_CRM"</p>	Android, iOS	With this custom attribute defined and set for an app developer name, users do not see the global search icon in the top navigation of that app.
SHOW_OPEN_IN	<ul style="list-style-type: none"> TRUE FALSE 	Android, iOS	<ul style="list-style-type: none"> If set to TRUE, lets users share a file from the Salesforce mobile app via a link to the file, or open a Salesforce file in a third-party app. If set to FALSE, disables users from sharing a file from the Salesforce mobile app or opening a Salesforce file in a third-party app.

Attribute Key	Attribute Value	Platform	Description
SHOW_PRINT	<ul style="list-style-type: none"> TRUE FALSE 	iOS	<ul style="list-style-type: none"> If set to TRUE, lets users print from the Salesforce mobile app. If set to FALSE, disables printing from the Salesforce mobile app.

 **Tip** Connected app attribute changes take effect when users force quit the Salesforce mobile app or when they log in to a new session. To ensure that new or modified settings take effect for all users, we recommend that you revoke access to the Salesforce mobile app so everyone is required to log in again. We also recommend that you warn users about the changes you intend to make, especially if you're going to restrict activities that were previously available. The Salesforce mobile app doesn't display messages or indicators that connected app settings have changed.

Salesforce Mobile App Notification Types

Keep users up to speed on important events in Salesforce and engaged with their workflow with notifications.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: both Salesforce Classic and Lightning Experience

Setup available in Salesforce Classic in: all editions except **Database.com**

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS NEEDED

To view notifications settings:	View Setup and Configuration
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To modify notifications settings:	Customize Application
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Notification Types

You can choose to send these types of notifications to Salesforce mobile app users.

- In-app notification—Keep users aware of relevant activity while they're using the Salesforce mobile app. The user taps  to view the 20 most recent notifications received within the past 30 days. If Digital Experiences is enabled for your org, users see notifications from all the Experience Builder

sites that they're members of. To help users identify which site a notification came from, the site name is listed after the time-stamp.

- Push notification—An alert appears on the user's mobile device when a user has installed the Salesforce mobile app for Android or iOS. These alerts can consist of text, icons, and sounds, depending on the device type. If you enable push notifications for your org, users can choose whether to receive push notifications on their device.



Note To enable push notifications, you must also enable in-app notifications.

The content of mobile push notifications can be displayed outside of the Salesforce mobile app, such as on a mobile device's lock screen. Full content push notifications are enabled by default for the Salesforce mobile app, but you can [choose to display minimal content](#) instead.

Standard and Custom Notifications

You can send both standard notifications and custom notifications.

- Standard notifications—Available for use cases predefined by Salesforce, like reminding a user of an upcoming deadline or notifying a user when someone mentions them on Chatter.
- Custom notifications—Tailored to your own use cases. For example, you can alert an account owner if a new support case is logged while trying to close a deal. Or you can send a notification for a unique workflow built entirely with custom objects. [Create and send custom notifications](#) from Notification Builder in Setup.

The behavior of standard and custom notification types depends on the delivery settings for each type. You can [manage the delivery settings for your org's notification types](#) from Notification Delivery Settings in Setup.

For a notification type to be delivered to the Salesforce mobile app, you must enable the mobile channel and the desired versions of the Salesforce mobile app. For most standard notification types, the mobile channel and the Salesforce mobile app are enabled by default. However, not all standard notification types are available for the Salesforce mobile app.

[Enable Salesforce Mobile App Notifications](#)

Allow all users in your organization to receive in-app and push notifications.

[Disable Full Content Push Notifications](#)

The content of mobile push notifications can be displayed outside of the Salesforce mobile app, such as on a mobile device's lock screen. Full content push notifications are enabled by default for the Salesforce mobile app, but you can choose to display minimal content instead.

[Considerations for Salesforce Mobile App Notifications](#)

Before you begin sending notifications, learn about the considerations specific to in-app and push notifications.

Enable Salesforce Mobile App Notifications

Allow all users in your organization to receive in-app and push notifications.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: both Salesforce Classic and Lightning Experience

Setup available in Salesforce Classic in: all editions except **Database.com**

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS NEEDED

To view notifications settings: View Setup and Configuration

To modify notifications settings: Customize Application

1. From Setup, enter *Notifications* in the Quick Find box, then select **Salesforce Notifications**.
2. Select the notification types you want to enable.
3. Click **Save**.

Disable Full Content Push Notifications

The content of mobile push notifications can be displayed outside of the Salesforce mobile app, such as on a mobile device's lock screen. Full content push notifications are enabled by default for the Salesforce mobile app, but you can choose to display minimal content instead.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: both Salesforce Classic and Lightning Experience

Setup available in Salesforce Classic in: all editions except **Database.com**

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS NEEDED

To view notifications settings: View Setup and Configuration

To modify notifications settings: Customize Application

When full content push notifications are disabled, custom notification types display the notification title only. Standard notification types use generic messages.

For example, a default full content notification reads “Allison Wheeler mentioned you: @John Smith, heads-up! New sales strategy for Acme account.” However, when you disable full content push notifications, the equivalent push notification reads “Allison Wheeler mentioned you.”

You can disable full content push notifications for each of your connected apps.

1. From Setup, enter *Connected Apps* in the Quick Find box, then select **Manage Connected Apps**.
2. Locate the desired app, then select **Edit** from the dropdown menu.
3. Deselect **Display full content push notifications**.
4. Save your change.

 **Note** Some apps don't support displaying full content push notifications, including Salesforce Chatter and Field Service. If your org was created before Summer '18, these apps keep their last known push notification settings. To change push notification settings in the future, file a case with Salesforce Support.

Considerations for Salesforce Mobile App Notifications

Before you begin sending notifications, learn about the considerations specific to in-app and push notifications.

Approval Requests

A user can receive approval requests in Salesforce mobile app notifications only when the user receives approval requests as email notifications. You or your user can change the **Receive Approval Request Emails** user field to set this preference.

Content Limits

Notification titles and bodies are trimmed after merge fields are expanded.

- In-app notification titles have a maximum of 250 characters and the bodies have a maximum of 750 characters.
- Character limits for mobile push notifications depend on the **Display full content push notifications** setting on the **Salesforce for iOS** or **Salesforce for Android** connected apps pages in Setup.

Setting	Title Maximum	Body Maximum
Enabled	35 characters	255 characters
Not Enabled	100 characters	No body displayed

Data Privacy

All Universal Notification System notifications are automatically deleted after 30 days.

All push registrations are automatically deleted when refresh tokens have been revoked.

When a feed item is removed or deleted, the associated notification remains visible.

Message Customers in the Salesforce Mobile App

Modernize your communication by letting agents message customers from the Salesforce mobile app. Agents who use enhanced messaging channels or Enhanced Chat can chat with customers on the go.

REQUIRED EDITIONS

Available in: Lightning Experience. [View required editions.](#)

 **This article applies to:**

Messaging for In-App, Messaging for Web, enhanced WhatsApp, enhanced Facebook Messenger, enhanced SMS, enhanced Apple Messages for Business, enhanced LINE, Bring Your Own Channel, and Bring Your Own Channel for CCaaS

 **This article doesn't apply to:**

Standard WhatsApp, standard Facebook Messenger, and standard SMS channels

Gone are the days of requiring agents to sign in to the desktop site to message customers. Some of our customers work in face-to-face environments such as real estate or the sharing economy where a computer isn't available. Some of our customers want to be available all the time, even when they're away from a computer. Some of our customers work in highly regulated industries where they need to use an approved device to have 1:1 engagements with their clients in a compliant way. We offer messaging in the Salesforce mobile app as a solution to the evolving landscape of human connectedness.

[Considerations and Limitations for Messaging in the Salesforce Mobile App](#)

Before starting your setup process, review the considerations and limitations for using the Salesforce mobile app when messaging customers.

[Set Up Messaging in the Salesforce Mobile App](#)

Create your messaging channel, customize a mobile-friendly agent interface, and then let your agents do the talking.

[Message Customers in the Salesforce Mobile App](#)

The messaging experience in the Salesforce mobile app is similar to the messaging experience on the desktop site. You can message from a smartphone or tablet. Review the relevant messaging documentation for agents to learn more.

Considerations and Limitations for Messaging in the Salesforce Mobile App

Before starting your setup process, review the considerations and limitations for using the Salesforce mobile app when messaging customers.

REQUIRED EDITIONS

Available in: Lightning Experience. [View required editions.](#)

 **This article applies to:**

Messaging for In-App, Messaging for Web, enhanced WhatsApp, enhanced Facebook Messenger, enhanced SMS, enhanced Apple Messages for Business, enhanced LINE, Bring Your Own Channel, and Bring Your Own Channel for CCaaS

 **This article doesn't apply to:**

Standard WhatsApp, standard Facebook Messenger, and standard SMS channels

- From mobile messaging, agents can: Send messages; transfer messages to other agents, bots or queues; send messaging components; send voice notes; and attach files.
- From the mobile app, agents can't: Conference; flag a supervisor; send quick text; and send emojis.
- Enhanced Omni is required.
- To use business-initiated outbound messaging, you're not required to log into the Omni widget first.
- For optimal performance, don't add additional components, beyond the Enhanced Conversation Component, to the mobile app agent console.
- Omni presence statuses don't work when you're signed in to the Salesforce app and the desktop site with the same credentials at the same time. Agents must work from one or the other at a given time.
- Drafts are not saved when you navigate away from an active messaging session. For example, if you draft a message, navigate back to omni inbox, and then return to the messaging session, then the draft is not persisted.
- iOS won't render the .ogg WhatsApp voice message format inline in the conversation transcript. Instead, download and listen to the file on the desktop site.

Set Up Messaging in the Salesforce Mobile App

Create your messaging channel, customize a mobile-friendly agent interface, and then let your agents do the talking.

REQUIRED EDITIONS

Available in: Lightning Experience. [View required editions.](#)

 **This article applies to:**

Messaging for In-App, Messaging for Web, enhanced WhatsApp, enhanced Facebook Messenger, enhanced SMS, enhanced Apple Messages for Business, enhanced LINE, Bring Your Own Channel, and Bring Your Own Channel for CCaaS

 **This article doesn't apply to:**

Standard WhatsApp, standard Facebook Messenger, and standard SMS channels

Messenger, and standard SMS channels

USER PERMISSIONS NEEDED

To send and receive messages in the Salesforce mobile app:	Messaging User permission set license AND Message on Mobile permission
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While the end result is the ability to message customers from the Salesforce app on a smartphone or tablet, setup and configuration for this functionality is done on the Salesforce desktop site.

Set Up Enhanced Omni

Our messaging channel types don't require enhanced omni when used on the desktop site. You must enable enhanced omni to message from the Salesforce app.

[Enable enhanced Omni.](#)

Set Up Your Messaging Channel

Follow the setup guide for the type of messaging you want to offer.

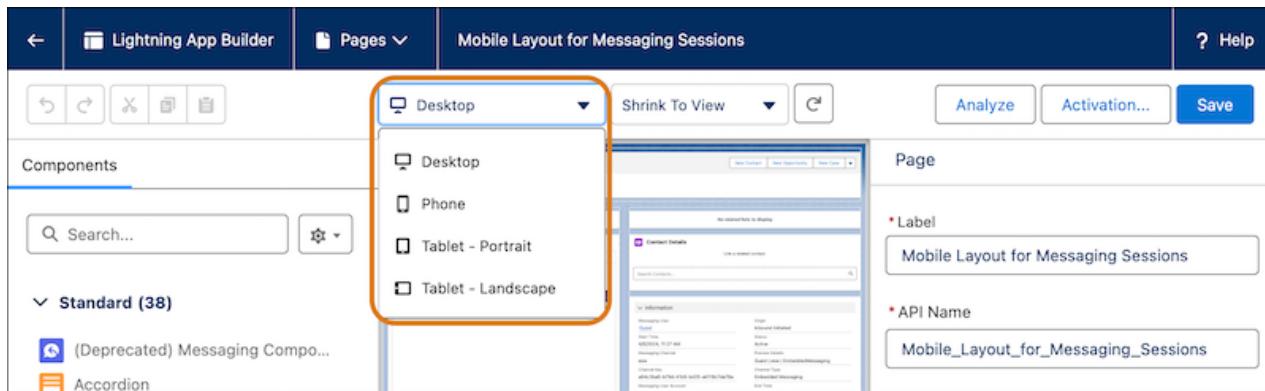
The Salesforce mobile app is compatible with these messaging types.

1. [Enhanced Chat](#)
2. [Enhanced Messaging for WhatsApp](#)
3. [Enhanced Facebook Messenger](#)
4. [Apple Messaging for Business](#)
5. [Enhanced SMS Messaging](#)

Optimize Your Agent Console for the Salesforce app

Customize how the agent console appears.

1. On the desktop site, open the agent console.
2. Click the **Setup** icon, and then select **Edit Page**.
3. Click the **Pages** dropdown menu, and then select **+ New Page**.
4. Select **Record Page**, and then click **Next**.
5. Give your layout a Label, and then select **Messaging Session** as the Object.
6. Select a page template, and click **Done**.
7. In the layout field, select **Phone** if your team primarily messages from their smartphones. Select one of the **Tablet** options if your team primarily messages from their tablets. .



8. Add the Enhanced Conversation component to the mobile layout.

While you can add more Lightning components, doing so can affect app performance. For optimal performance, add only the Enhanced Conversation component.

9. Save your changes.

10. Click Activation....

11. Click Assign as Org Default.

12. In the Assign Form Factor window, select Phone, and then click Next.

13. Save your changes.

Prepare Your Users to Message in the Salesforce App

The Messaging User permission set license is required to message with the Salesforce app.

- If the setup steps for your respective messaging type don't include assigning the Messaging User permission set license, [assign it to your agents](#).
- [Assign the Message on Mobile permission to your agents.](#)

Message Customers in the Salesforce Mobile App

The messaging experience in the Salesforce mobile app is similar to the messaging experience on the desktop site. You can message from a smartphone or tablet. Review the relevant messaging documentation for agents to learn more.

REQUIRED EDITIONS

Available in: Lightning experience

USER PERMISSIONS NEEDED

To send and receive messages in the Salesforce mobile app:

Messaging User permission set license AND
Message on Mobile permission

Reps can reply to customer-initiated messaging sessions and send business-initiated messaging sessions in the Salesforce mobile app on a smartphone or tablet. Initial instructions are slightly different for each scenario.

See Also

[Open Messaging](#)

[Accept a Message and Chat with a Customer](#)

[Send Voice Messages in Messaging Sessions](#)

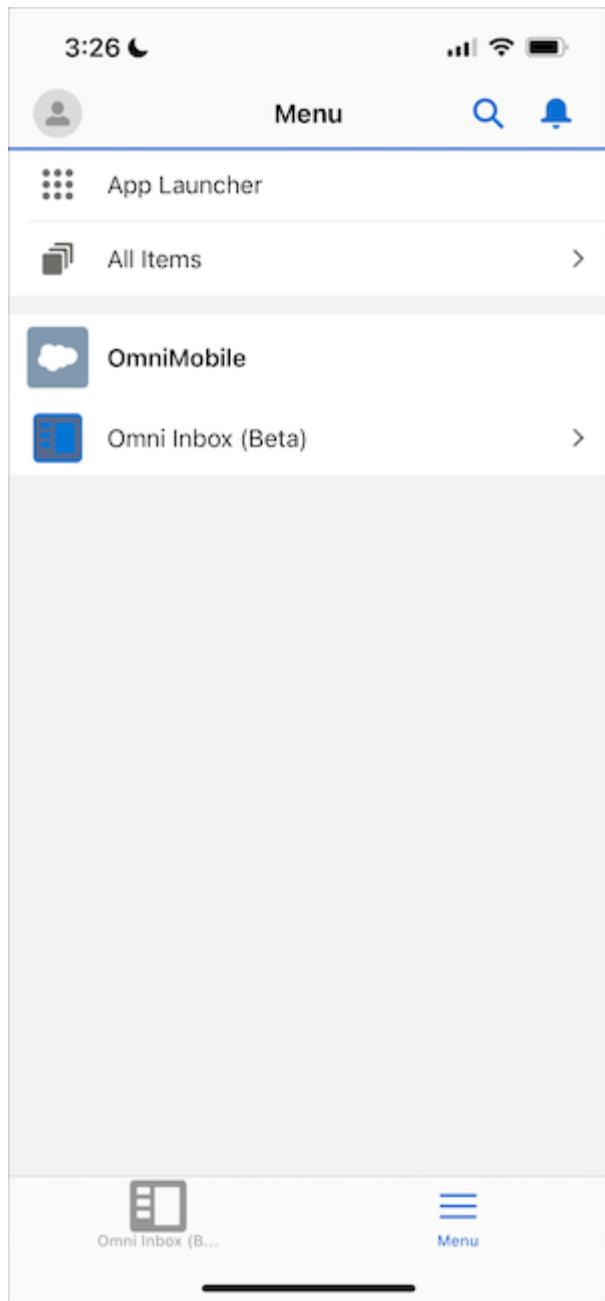
[Inactive a Messaging Session](#)

[End a Messaging Session](#)

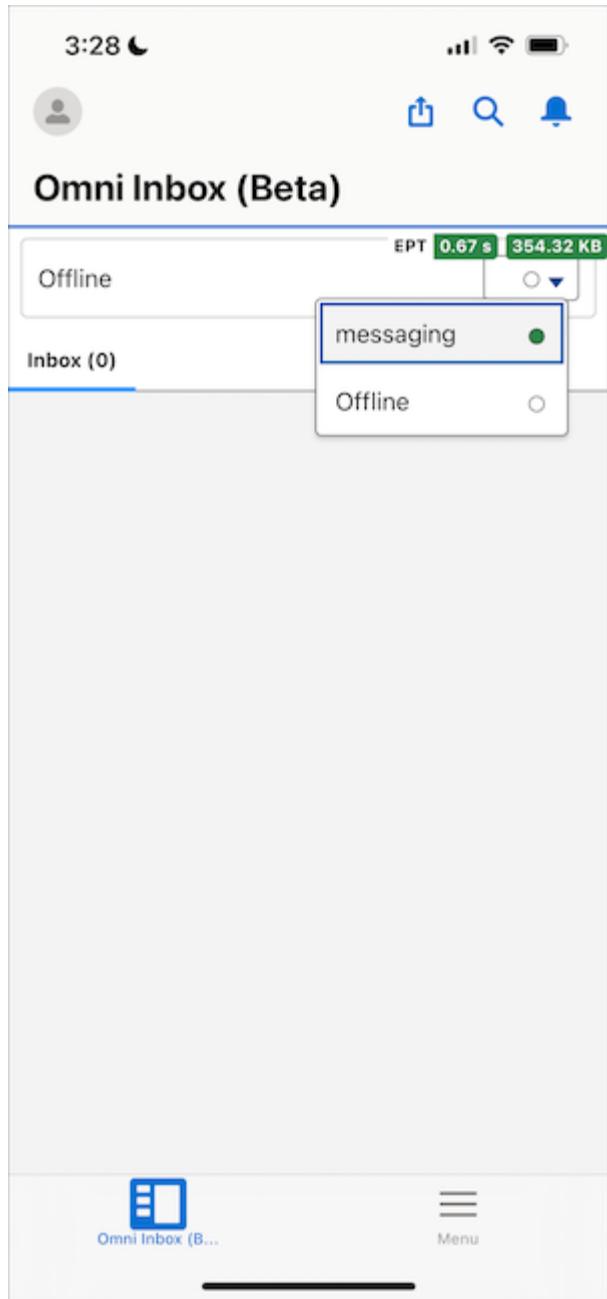
Customer-Initiated Messaging

Send and receive messages in a customer-initiated messaging session with the Salesforce Mobile App.

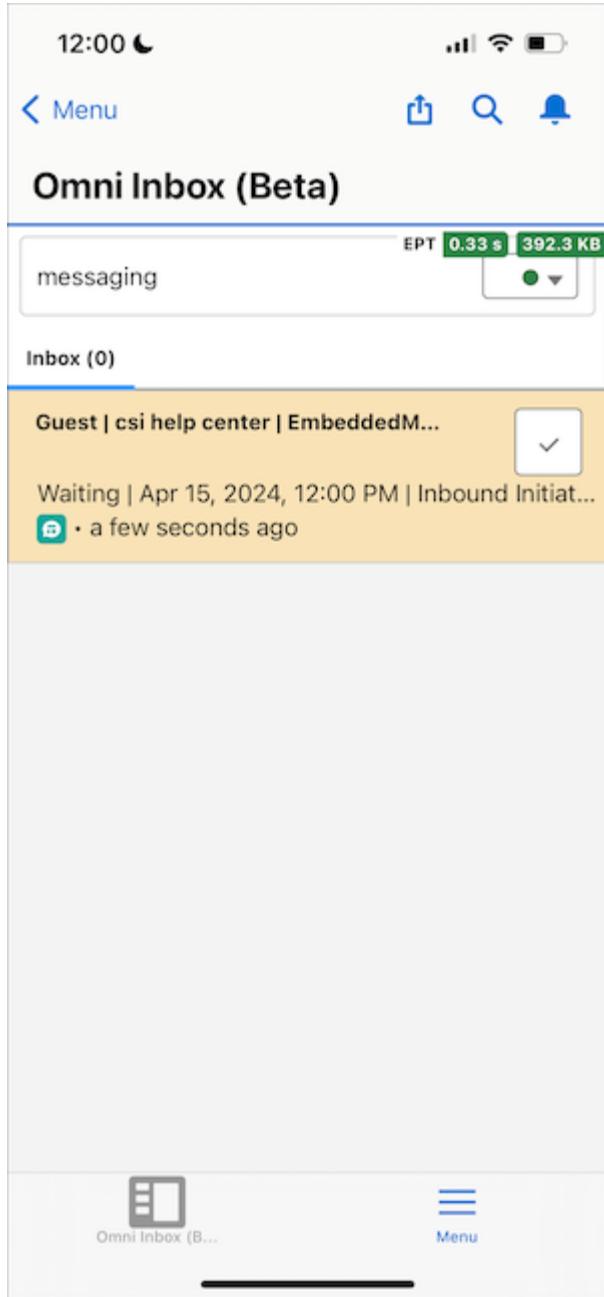
1. Sign in to the Salesforce mobile app on a smartphone or tablet, and then select **OmniMobile** from the App Launcher.
2. Click **Omni Inbox (Beta)**.



3. In the Omni widget, set yourself as available for messaging.



4. Click the checkmark icon on an incoming messaging session to accept it.

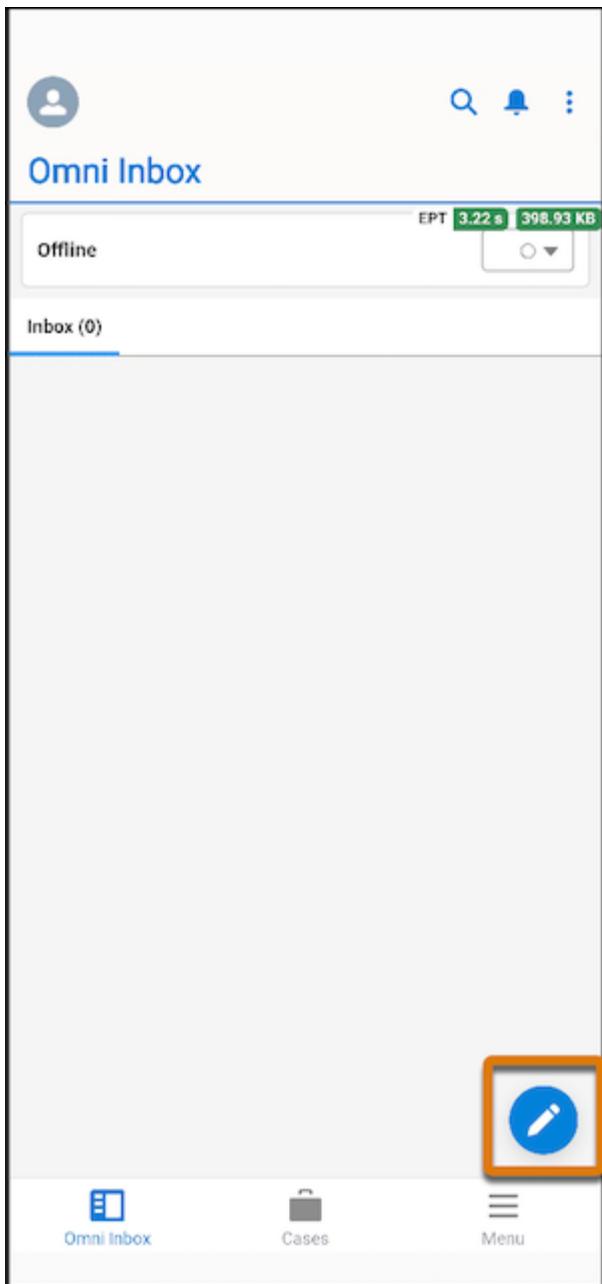


5. Message with your customer. When the conversation is over, click the downward arrow, and select **End Chat**. You can alternatively set the conversation to Inactive if your customer disappears.

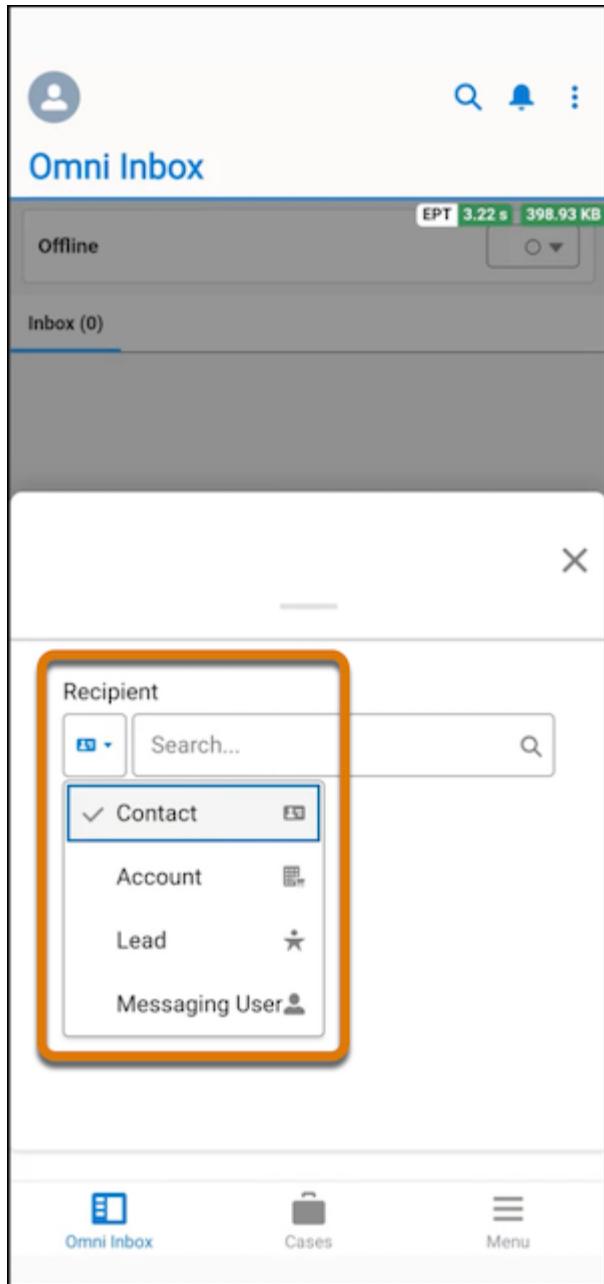
Business-Initiated Messaging

Send and receive messages in a business-initiated messaging session on the Salesforce Mobile App.

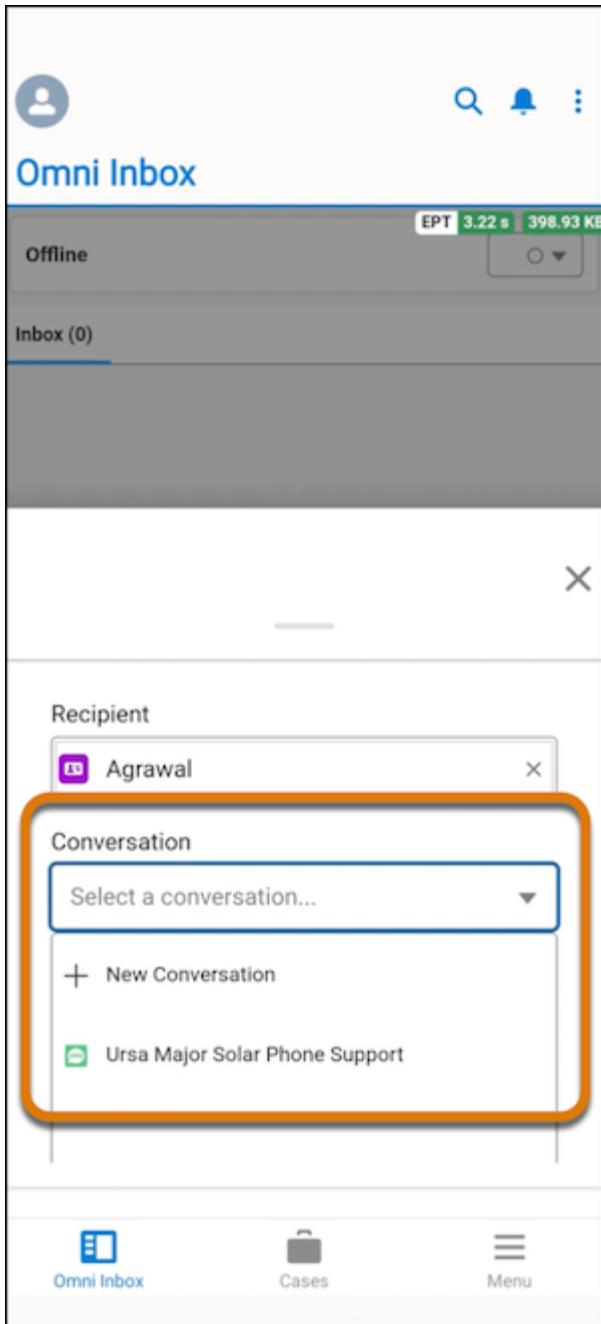
1. Sign in to the Salesforce mobile app, and then select **OmniMobile** from the App Launcher.
2. Click **Omni Inbox (Beta)**.
3. Click the pencil icon.



4. In the Contact dropdown menu, select the type of contact record you want to chat with.



5. In the Search bar, enter the name of the individual, and then select their record.
6. In the Conversation field, select an existing Messaging User record. If you're using SMS messaging, you can alternatively select **+ New Conversation** to associate a new Messaging User record to an existing Lead, Contact, or Account record.



7. If you selected an existing Messaging User record in the Conversation field, you'll see that user implicitly opted in. Select **Resume Conversation**. Now, skip to step 9.
8. If you selected **+ New Conversation** from the Conversation field:
 - a. In the Channel field, select an SMS channel.
 - b. In the Phone field, enter the new phone number.
 - c. Select the box to confirm that this recipient has consented to receive messages.
 - d. Click **Start Conversation**.
9. Enter and send your first message.

Customize the Salesforce Mobile App

The Salesforce mobile app is fully customizable to the needs of your users. Customize branding, navigation, and more to get the most of out of running Salesforce on mobile devices.

[Customize a Lightning App Navigation Menu in the Salesforce Mobile App](#)

Users who have permission to edit the desktop navigation bar in a Lightning app can also reorder items in the navigation menu for that app in the Salesforce mobile app.

[Customize the Mobile Only Navigation Menu in the Salesforce Mobile App](#)

Select the Lightning pages, Visualforce pages, Lightning components, and other productivity items you want to appear in the navigation menu and navigation bar of the Salesforce mobile app using the Mobile Only app.

[Create a Custom Launchpad for the Salesforce Mobile App](#)

Launchpads let users quickly access the information they need. Use the Launchpad Lightning web component to add links to Lightning pages on mobile and desktop. If you don't need a launchpad for desktop users, you can create a mobile-specific launchpad. Set the component visibility to show the launchpad to mobile users only. That way, mobile users can still access all of their navigation menu items, but the most important links are only a tap away.

[Customize Salesforce Mobile App Branding](#)

Change the Salesforce mobile app's appearance, including the loading page background color, loading page logo, and header background color, so the app matches your company's branding.

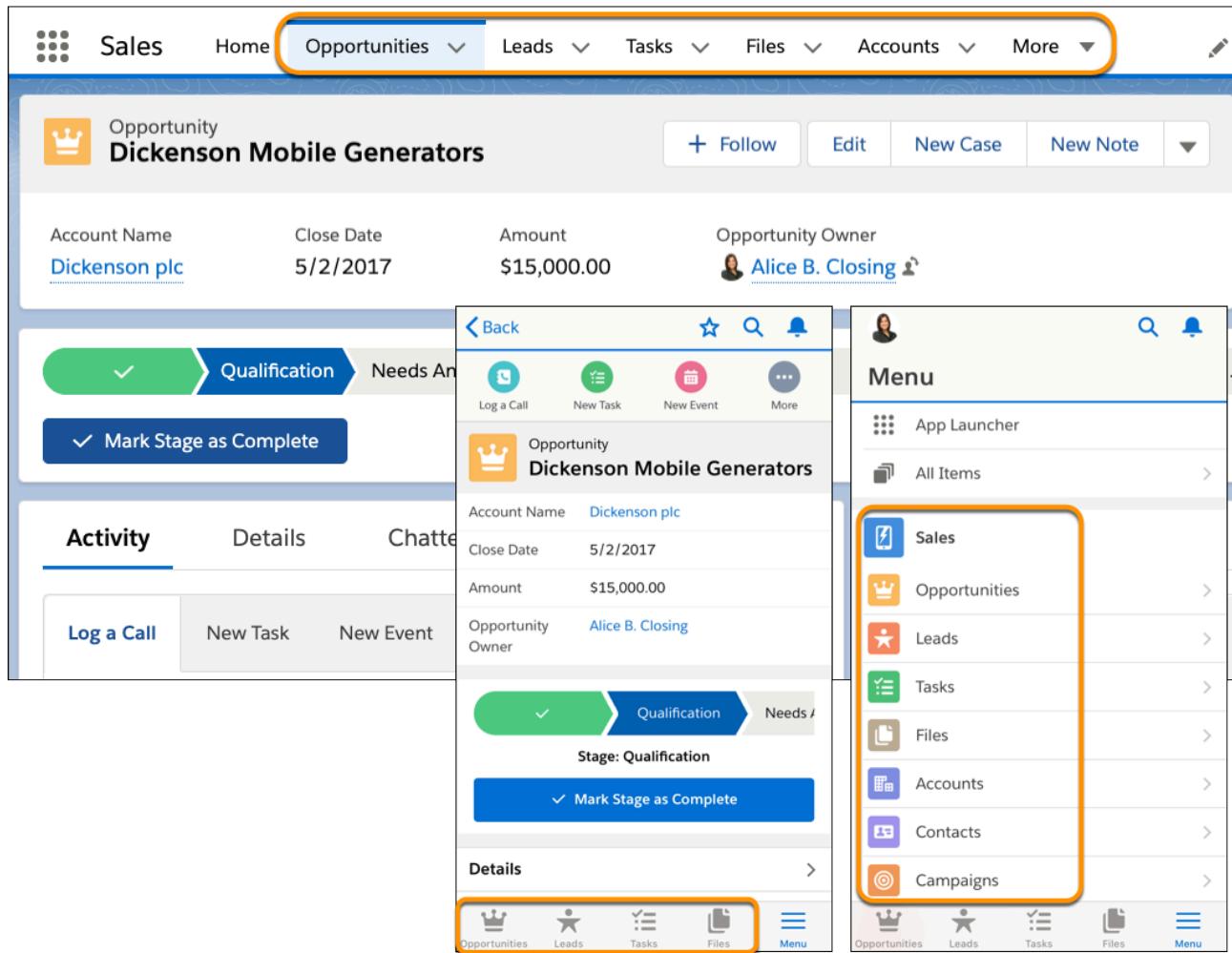
[Access Collections on the Salesforce Mobile App](#)

Collections enable you to curate your analytics in a customized way, and have a personalized set of CRM Analytics items, and reports and dashboards when you first open the application. Analytics can be added from different apps and folders, and they can exist in multiple collections. With collections, you're able to quickly access data that's relevant to your work or interests in one place.

Customize a Lightning App Navigation Menu in the Salesforce Mobile App

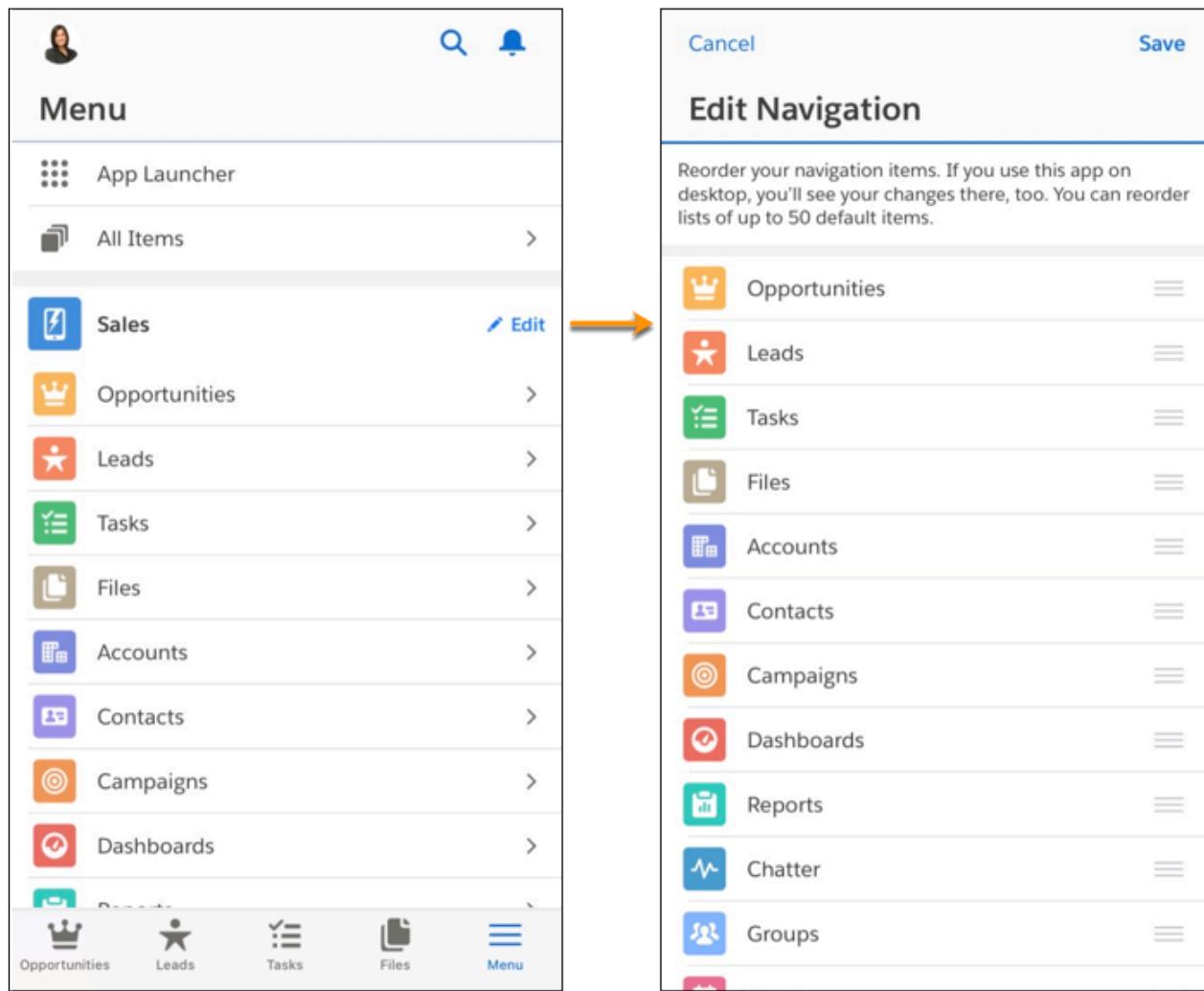
Users who have permission to edit the desktop navigation bar in a Lightning app can also reorder items in the navigation menu for that app in the Salesforce mobile app.

In Lightning Experience desktop, users who can personalize the navigation bar can add and reorder items, and rename or remove items they've added. Those changes sync to the navigation menu and navigation bar of that Lightning app in the Salesforce mobile app. To learn more about personalizing the navigation bar in Lightning Experience desktop, see [Personalize the Navigation Bar in Lightning Experience](#).



In the Salesforce mobile app, users can reorder the navigation menu items of a Lightning app, if they have 50 or fewer default items. Those changes sync to the desktop version of the app.

1. Tap **Menu** in the navigation bar at the bottom of the screen.
2. Tap **Edit**.
3. Drag items to reorder them.
4. Tap **Save**.



Customize the Mobile Only Navigation Menu in the Salesforce Mobile App

Select the Lightning pages, Visualforce pages, Lightning components, and other productivity items you want to appear in the navigation menu and navigation bar of the Salesforce mobile app using the Mobile Only app.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: both Salesforce Classic and Lightning Experience

Setup available in Salesforce Classic in: all editions except **Database.com**

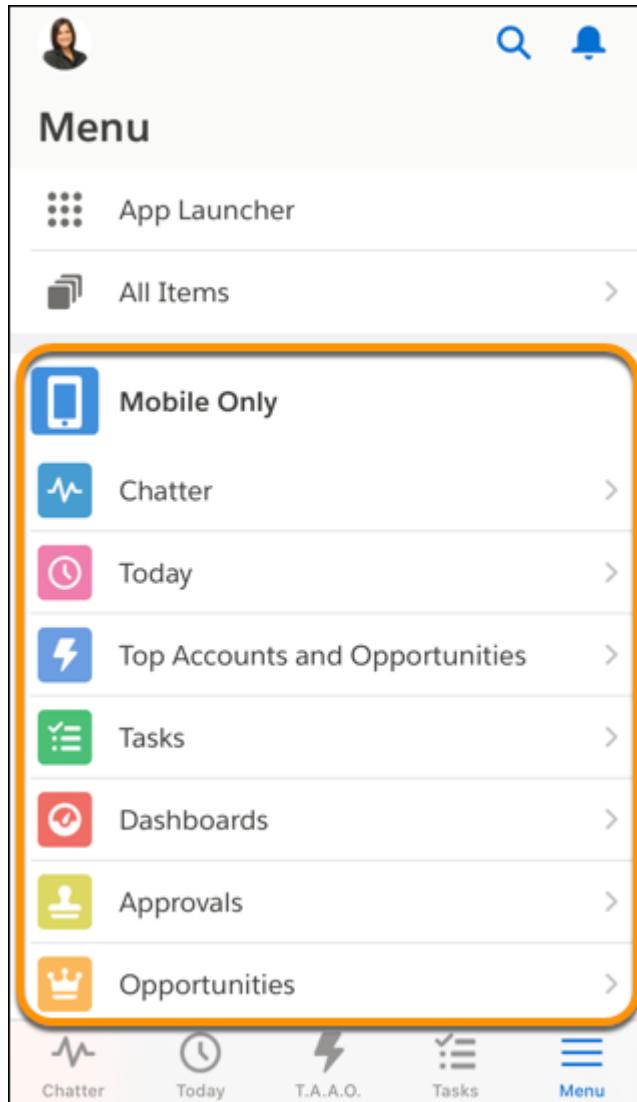
Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

 **Warning** Mobile Only is now considered a legacy feature. You can still use it, but we highly

recommended using the Lightning App Navigation method instead. For more information about how to make the switch, go to [Customize a Lightning App Navigation Menu in the Salesforce Mobile App](#).

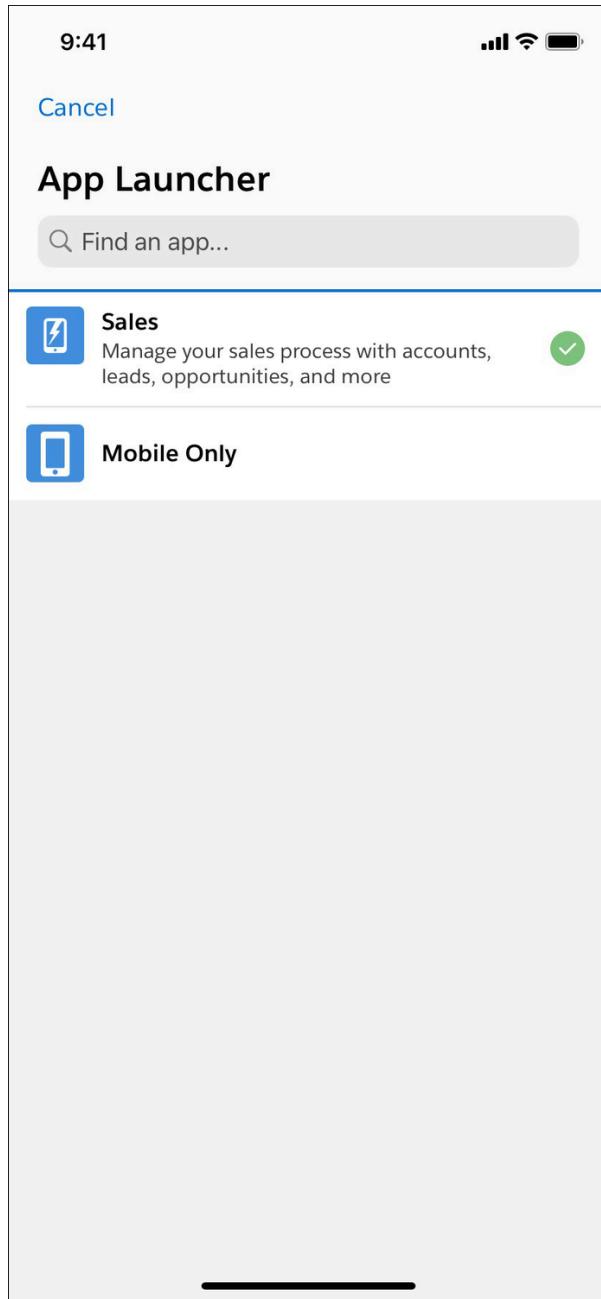
About the Mobile Only App

The Mobile Only app is a navigation experience for the Salesforce mobile app. Admins customize the navigation menu for Mobile Only in Setup. Users see the navigation items when they tap **Menu** in the navigation bar. The first four items also appear in the navigation bar at the bottom of the screen.



Users can keep using the Mobile Only app, or they can switch to a Lightning app using the App Launcher. To learn how to customize the navigation menu for a Lightning app, see [Customize a Lightning App Navigation Menu in the Salesforce Mobile App](#).

If users want to access the default Mobile Only navigation items again, they can switch back to Mobile Only via the mobile App Launcher.



Disable the Mobile Only App

The Mobile Only app helps users transition to the new Salesforce mobile app. However, it might not make sense for your org if you've previously made Lightning apps available on mobile. You can disable the Mobile Only app by adding a connected app custom attribute.



Warning Don't disable the Mobile Only app unless you've made a Lightning app available on mobile.

To disable the Mobile Only app, go to Setup. In the Quick Find box, enter *Connected Apps*, select **Manage Connected Apps**, and click the name of the connected app that you want to modify. In the

Custom Attributes section on the connected app page, click **New**. Enter `HIDE_MOBILE_ONLY_APP` for the attribute key and “`true`” for the attribute value.

 **Note** Remember to wrap the attribute value in quotation marks.

The Mobile Only app is disabled when the user force quits the Salesforce mobile app or logs in to a new session. On the next launch, the user sees the default Lightning app. On all subsequent launches, the user sees the most recent Lightning app that the user accessed on mobile.

Customize Navigation Items

You can include Visualforce pages, Lightning pages, and Lightning components. Make sure you’ve created tabs for those items first. To create a tab, from Setup, enter `Tabs` in the Quick Find box, and select **Tabs**.

To customize navigation items, in the Quick Find box, enter `Navigation`, and select **Salesforce Navigation**. After you save your changes, refresh the Salesforce mobile app to see the changes.

 **Tip** When organizing the menu items, put the items that users use most at the top.

Depending on your organization’s settings, the menu can contain:

Menu Item	Description
Approval Requests	Displays a list of the user’s pending approvals. Users can tap an approval item and approve or reject it from within Salesforce. Available in Salesforce for iOS.
Canvas apps	Appears for organizations that have enabled a canvas app to appear in the navigation menu.
Chatter	The user’s main feed. Appears for organizations that have Chatter enabled.
Dashboards	Availability depends on edition and user permissions. If you don’t add this item to the navigation menu, dashboards and the Dashboards item are automatically included in the set of Smart Search Items.
Events	Lists events owned by the user, that the user created for him- or herself, and that the user or a user’s groups are invited to. If you don’t add this item to the navigation menu, events and the Events item are automatically included in the set of Smart Search Items.
Forecasts	Displays the Forecasts app, a helpful tool for every member of a sales team to track forecast data and monitor progress towards quota. Available in Salesforce for iOS. Your org must have Forecasting enabled.
Groups	Appears for organizations that have Chatter enabled. If you don’t add this

Menu Item	Description
	item to the navigation menu, groups and the Groups item are automatically included in the set of Smart Search Items.
Lightning component tabs	Only custom Lightning components that have a Lightning component tab associated with them can appear in the navigation menu.
Lightning pages	Custom app pages.
News	Displays the News app, a one-stop place for news and other insights about the user's accounts, contacts, leads, and opportunities.
Notes	Displays the Notes app. If you don't add this item to the navigation menu, notes and the Notes item are automatically included in the set of Smart Search Items.
People	Appears for organizations that have Chatter enabled. If you don't add this item to the navigation menu, profiles, and the People item are automatically included in the set of Smart Search Items.
Reports	Availability depends on edition and user permissions. If you don't add this item to the navigation menu, reports and the Reports item are automatically included in the set of Smart Search Items.
Smart Search Items	Puts a list of recently accessed items in the navigation menu. Anything you put below the Smart Search Items element appears below those recent items. If Smart Search Items is one of the first four items in the navigation menu, some recent items also appear in the navigation bar at the bottom of the screen.
Tasks	Lists of a user's open and closed tasks and tasks that have been delegated. If you don't add this item to the navigation menu, tasks and the Tasks item are automatically included in the set of Smart Search Items.
Today	An app that helps users plan for and manage their day by integrating mobile calendar events with associated Salesforce tasks, accounts, and contacts. The app also allows users to instantly join conference calls, quickly log notes about events, and more.
Visualforce page tabs	Only Visualforce pages with the Available for Lightning Experience, Experience Builder sites, and the mobile app checkbox selected are displayed in the Salesforce mobile app.

Things to Keep in Mind

- You can't set different menu configurations for different types of users.
- Anything represented by a tab in Salesforce—such as standard and custom objects, Visualforce pages, the Chatter feed, People, or Groups—is visible for a user in the Salesforce mobile app menu, based on

the user's profile settings. For example, if a user is assigned to a profile that has the Groups tab set to Tab Hidden, the user doesn't see the Groups menu item in the Salesforce mobile app navigation menu, even though an admin has included it in the menu.

- The navigation menu in an Experience Builder site isn't controlled via the Navigation Menu settings page. Instead, the tabs that are specified in Tabs & Pages in the site's administration settings determine the contents of the site's navigation menu.
- If your users don't yet have a history of recent objects, they see these default objects in the Recent section initially: accounts, cases, contacts, leads, and opportunities. It can take up to 15 days for objects they work with to appear in the Recent section. To make objects appear under Recent sooner, they can pin them from the search results screen in the full Salesforce site.

[Lightning Apps by Default](#)

Starting in Winter '22, the Salesforce mobile app defaults to a phone-activated Lightning app if it's available to the user. Previously, all users had Mobile Only app navigation, but they could switch to a different Lightning app by using the App Launcher from the Menu tab. The Salesforce mobile app now selects the first available Lightning app by default—instead of Mobile Only—resulting in a change in the navigation bar at the bottom of the page. Users who don't have access to any phone-activated Lightnings apps default to Mobile Only.

Lightning Apps by Default

Starting in Winter '22, the Salesforce mobile app defaults to a phone-activated Lightning app if it's available to the user. Previously, all users had Mobile Only app navigation, but they could switch to a different Lightning app by using the App Launcher from the Menu tab. The Salesforce mobile app now selects the first available Lightning app by default—instead of Mobile Only—resulting in a change in the navigation bar at the bottom of the page. Users who don't have access to any phone-activated Lightnings apps default to Mobile Only.



This default navigation change shows users a tooltip at the bottom of the app.



Why is the Salesforce mobile app changing its default navigation?

Salesforce created Mobile Only as a temporary technology to help upgrade organizations from the classic Salesforce1 app experience to the new Lightning-enabled mobile app experiences. Because Salesforce innovation is devoted to Lightning, this bridging technology has been deprecated in favor of using a Lightning app that's created by your organization. New features such as [Dynamic Interactions](#) require a Lightning app on mobile to function correctly.

What do I use instead of Mobile Only?

You can use Lightning apps. If you already enabled Lightning apps for Mobile, you can see that they're

automatically selected instead of defaulting to Mobile Only.

You can verify that Lightning apps are selected by navigating to the Menu tab in the app and tapping **App Launcher**. If there are Lightning apps other than Mobile Only, the default is to the first app on the list.

I'm already using Lightning apps on desktop. Do I have to do anything?

Make sure that your Lightning apps are enabled for the phone form factor. Your users then have consistent navigation on all their devices, and there's no maintenance for the phone form factor.

How can I enable Lightning apps for Mobile?

It's easiest to enable all your existing Lightning apps at the same time. From Setup, in the Quick Find box, enter *New Salesforce*, select **New Salesforce Mobile App Quickstart**, and click **Launch the Tool**.



Or you can enable Lightning apps one at a time in App Manager. From Setup, in the Quick Find box, enter *App Manager*, and then select **App Manager**. Click the arrow next to the Lightning app that you want to enable for your phone, and then select **Edit**. Go to App Options and from Supported Form Factors, select **Desktop and Phone**.



Additional Resources

[Set Up Lightning Experience on Mobile](#)

Create a Custom Launchpad for the Salesforce Mobile App

Launchpads let users quickly access the information they need. Use the Launchpad Lightning web component to add links to Lightning pages on mobile and desktop. If you don't need a launchpad for desktop users, you can create a mobile-specific launchpad. Set the component visibility to show the launchpad to mobile users only. That way, mobile users can still access all of their navigation menu items, but the most important links are only a tap away.

REQUIRED EDITIONS

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Essentials, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS NEEDED

To create and save Lightning pages in the

Customize Application

USER PERMISSIONS NEEDED

Lightning App Builder:



Launchpads are customizable Lightning web components that you can add to any Lightning page. They create a shortcut to important places for your users. You can add any items that have tabs associated with them—standard and custom objects, Lightning web components, Lightning pages, Visualforce pages, and external websites. Make sure that your users have permission to view the tabs—they only see items that they have access to in the launchpad.

You can use launchpads on multiple pages and add multiple launchpads to one page.

When users view the page on desktop or mobile, they see the launchpad. On mobile, Internal links open in the Salesforce mobile app, while external links open in a mobile browser window.

1. On your desktop, navigate to the Lightning page that you want to add a launchpad to.
2. Click the Setup gear icon, then click **Edit Page**.
3. From the list of standard Lightning web components, find Launchpad and drop it into the desired spot on the page.
4. Enter a custom title for your launchpad or keep the default.
5. Click **Select...** under Launchpad Items.
6. From the list of available items, drag at least one item into the Selected list

Note You can select up to 20 items. Users see the first six items you select, with the option to expand the launchpad to view more.

7. Click **OK**.
 8. Select an item from the list to view and edit the details.

Note If you don't have access to a tab, you can still add it to the launchpad, but you can't see it in the component preview.
 9. Add any component visibility filters that you want.
 10. Click **Save | Activate | Assign as Org Default | Desktop and Phone | Save**.
 11. To view your changes on desktop, click **Back**.
- Note** The Calendar navigation item isn't supported in mobile Launchpad components. Access it through a tab instead.

Customize Salesforce Mobile App Branding

Change the Salesforce mobile app's appearance, including the loading page background color, loading page logo, and header background color, so the app matches your company's branding.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: both Salesforce Classic and Lightning Experience

Setup available in Salesforce Classic in: all editions except **Database.com**

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

-  **Note** Images that you upload to customize the Salesforce mobile app are stored in a Documents folder named Salesforce Branding Resources. For this reason, the Documents object must be enabled for your organization before administrators can view and modify the Salesforce mobile app branding page. (The Documents tab doesn't need to be visible, however.) For users to see custom branding, they must have "Read" user permissions on Documents.
-

USER PERMISSIONS NEEDED

To view Salesforce mobile app branding settings:

[View Setup and Configuration](#)

To modify Salesforce mobile app branding settings:

[Customize Application](#)

[Modify All Data](#)

From Setup, enter *Branding* in the **Quick Find** box, then select **Salesforce Branding**, then click **Edit**. To customize brand color for key user interface elements, including the header, click  or enter a valid hexadecimal color code. To customize the background color of the loading page, click  or enter a valid hexadecimal color code. To customize the loading page logo, click **Choose File** to upload an image. Images can be .jpg, .gif, or .png files up to 200 KB. The maximum image size is 460 pixels by 560 pixels. Click **Save**.

You can customize:

Element	Description
Brand Color	<p>The color for key user interface elements such as the header, buttons, and search bar.</p> <p>Based on the brand color you select, contrasting colors for user interface elements such as borders for the navigation menu, the notifications list, and button text are automatically defined.</p> <p>The headers on overlays, popups, and dialogs—such as edit and create windows or windows that open from actions in the action bar—are affected by this setting. These headers are always white, to provide a visual indicator that the user is performing an action as opposed to simply viewing information.</p>

Element	Description
Loading Page Color	The background color on the loading page that appears after a mobile user logs in.
Loading Page Logo	<p>The image on the loading page that appears after a mobile user logs in.</p> <p>We recommend using an image with the largest dimensions allowable for best results. Maximum image size is 460 pixels by 560 pixels.</p>

Consider the following tips when customizing the branding of the Salesforce mobile app:

- When creating your logo image, be sure to compress it. In many image editing programs, this process is identified as “use compression,” “optimize image,” “save for web,” or “shrink for the web.”
- Verify that your logo appears correctly in Salesforce mobile app, using the same devices as your user base, not just a desktop monitor. Your image can render at different scales or proportions depending on the screen size and pixel density of each device.
- The Salesforce mobile app supports .png, .gif, and .jpg image formats for custom branding elements, but we recommend using .png for the best results.
- These interface elements can't be customized:
 - The Salesforce mobile app icon that appears on the mobile device's home screen.
 - The initial loading screen when launching Salesforce for iOS. This loading screen appears before the user is prompted by the login page.
- Your mobile users must close the app and then log in again to see any custom branding changes.
- When a user switches between two orgs that have custom branded loading pages, they see the loading page for the previous org until the branding for the new org is available.

You can also customize the branding for the Salesforce mobile app login page.

Access Collections on the Salesforce Mobile App

Collections enable you to curate your analytics in a customized way, and have a personalized set of CRM Analytics items, and reports and dashboards when you first open the application. Analytics can be added from different apps and folders, and they can exist in multiple collections. With collections, you're able to quickly access data that's relevant to your work or interests in one place.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

A CRM Analytics license is required to view and access CRM Analytics items.

1. Add a Collection to Home

- a. Tap **Edit** then tap **Add Card**.
- b. Tap **Collection** from the menu, and tap the collection you want.



2. Open an Item in a Collection

- a. Scroll across the Collection card and tap the item you want to open. You can also tap **Open Collection** then locate and tap the item.

3. Add Items to a Collection

- a. Tap **Open Collection** then tap
- b. Tap the available items on the page or use the search bar to locate the items to add to the collection.
- c. Tap **Done**.

4. Create a Collection

- a. Tap **Edit** then
- b. Give the collection a name, optional description, and color.
- c. Tap **Save**.
- d. Tap **Add Insights** then select items for the collection.



Work Offline with the Salesforce Mobile App

Your mobile users' productivity doesn't have to stop when there's no connectivity. When you enable caching and Offline Edit, users can keep working, unimpeded by a subway commute, FAA regulations, capricious cellular signals, or bunker-style buildings. Offline access is available for Salesforce for Android and iOS.

Manage caching and Offline Edit from Setup—enter *Offline* in the **Quick Find** box, then select **Salesforce Offline**.

Caching in the Salesforce mobile app is enabled the first time someone in your org installs Salesforce for Android and Salesforce for iOS.

The contents of a user's cache determines the data that's accessible when the user's mobile device is offline. Let's look at how the cache is initially populated and then updated throughout a Salesforce mobile app session.

Note A session is the time between logging in to and out of the mobile app. Putting the app in the background by switching away to a different app doesn't end a session.

- When a user logs in, the cache is empty. If the user's device goes offline with an empty cache, no Salesforce data is available.
- To customize their cache, users can go to their profile menu, select **Settings | Offline Preferences**, and then select up to seven items that they want to be available offline. If users change their minds, they can easily go back and choose new items.



If a user chooses not to customize their cache, Salesforce populates the user's cache with up to 30 recently accessed records for their five most recently accessed objects. In addition to these records, the user's tasks listed under **My Tasks** and their five most recently accessed dashboards are cached. However, if the user chooses at least one item from the Offline Preferences page, this selection replaces the existing cache with their new preferences.

Recently accessed records are determined by a user's activities in both the mobile app and the Salesforce desktop site, including Salesforce Classic and Lightning Experience.

Whether users customize their cache or stick with their recently accessed records, they can populate their cache by going to their profile and selecting **Settings | Offline Cache | Start Caching**. After users initially populate their cache, they can manually refresh the cache using the same steps.

 **Tip** We recommend that your users populate their cache each time they log in to Salesforce so they have a meaningful set of available data when offline. Depending on the size and complexity of a user's records, caching can take a few seconds to a couple of minutes. If the user goes offline before the cache is fully updated, some of the expected records won't be available.

When users put Salesforce in the background by switching away to a different app or navigating to their device's home screen, their cache may automatically populate or refresh. However, the success of the background cache refresh can vary across devices and operating systems. We recommend that users manually refresh the cache.

- Throughout a session, many of the other records that the user accesses are also added to the cache. (Not all Salesforce data is available offline—see [Create, Edit, and Delete Records in the Salesforce Mobile App While Online or Offline](#).)
- A record remains in the user's cache for 30 days. Each time the same record is accessed, the clock resets. But if the record isn't touched within 30 days, it's automatically removed from the cache and won't be available offline until the user accesses the record again.
- Logging out of the Salesforce mobile app removes all data from the cache. The next time the user logs in, the process of generating the cache starts over.

[Enable Offline Access and Offline Edit for the Salesforce Mobile App](#)

With just a few clicks, you can protect your Salesforce mobile app users against the vagaries of mobile connectivity. You can enable two levels of offline access: caching frequently accessed records, so users can view data while offline, and Offline Edit, so users can create, edit, and delete records while offline. Offline access is available in Salesforce for Android and iOS only.

[What's Available Offline in the Salesforce Mobile App](#)

With Salesforce mobile app caching and Offline Edit, Salesforce for Android and iOS users can work with many of their frequently accessed objects and records while offline. Here's the list of data and Salesforce mobile app user interface elements that are available offline.

[Create, Edit, and Delete Records in the Salesforce Mobile App While Online or Offline](#)

Whether online or offline, Salesforce mobile app users can create, edit, and delete records and monitor changes from the Pending Changes page. The Salesforce mobile app automatically syncs those pending changes to Salesforce and warns the user if there are conflicts to be resolved.

[Offline Access: What's Different or Not Available in the Salesforce Mobile App](#)

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

Enable Offline Access and Offline Edit for the Salesforce Mobile App

With just a few clicks, you can protect your Salesforce mobile app users against the vagaries of mobile connectivity. You can enable two levels of offline access: caching frequently accessed records, so users can view data while offline, and Offline Edit, so users can create, edit, and delete records while offline. Offline access is available in Salesforce for Android and iOS only.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: both Salesforce Classic and Lightning Experience

Setup available in Salesforce Classic in: all editions except **Database.com**

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS NEEDED

To view Salesforce mobile app settings:

[View Setup and Configuration](#)

To modify Salesforce mobile app settings:

[Customize Application](#)

1. From Setup, enter *Offline* in the Quick Find box, then select **Salesforce Offline**.
2. To allow viewing data while offline, select **Enable caching in Salesforce for Android and iOS**.
This option is automatically enabled the first time someone in your org installs either Salesforce for Android or Salesforce for iOS.
3. To allow updating records while offline, select **Enable offline create, edit, and delete in Salesforce for Android and iOS**.
This option isn't available if caching in the Salesforce mobile app is disabled.
4. Click **Save**.



Tip We strongly recommend leaving **Enable caching in Salesforce for Android and iOS** enabled. In addition to making cached data available offline, this setting also enables faster viewing of previously accessed records and better overall performance. If you disable caching, Salesforce for Android and Salesforce for iOS store only the minimum data required to maintain a session. This can impact performance because the app has to refresh record details and feed items every time they're viewed.

What's Available Offline in the Salesforce Mobile App

With Salesforce mobile app caching and Offline Edit, Salesforce for Android and iOS users can work with many of their frequently accessed objects and records while offline. Here's the list of data and Salesforce

mobile app user interface elements that are available offline.

Salesforce Data / Salesforce Mobile App Element	Available for Offline Viewing	Available to Create, Edit, or Delete Offline
Navigation Menu	Yes	n/a
Action Bar	Yes	Edit action: Yes Delete action: Yes Other actions: No
Global Search	Previous search results from current session	n/a
List Views	If viewed in current session	No
Records for Other Objects	If viewed in current session	If viewed in current session
Related Records	If viewed in current session	If viewed in current session
Salesforce Today	Main page and mobile event records, if viewed in current session	No
Salesforce Events	If viewed in current session	Create: No Edit and Delete: If viewed in current session
Tasks	Most recently accessed tasks from the first page of My Tasks list only	Most recently accessed tasks from the first page of My Tasks list only (The simplified New Task form must be disabled)
Notes	If viewed in current session	Create: Yes Edit: If viewed in current session Delete: No
Files	If viewed in current session	No
Dashboards (Enhanced Charts)	Most recently accessed only	No
Dashboards (Legacy Charts)	No	No

Salesforce Data / Salesforce Mobile App Element	Available for Offline Viewing	Available to Create, Edit, or Delete Offline
Feeds, Groups, and People	If viewed in current session	No
Notifications	If viewed in current session	n/a
Approvals (submit, approve, or reject)	No	No
Visualforce pages	No	No
Canvas Apps	No	No
Lightning pages	No	No
Salesforce App Settings	Yes	n/a

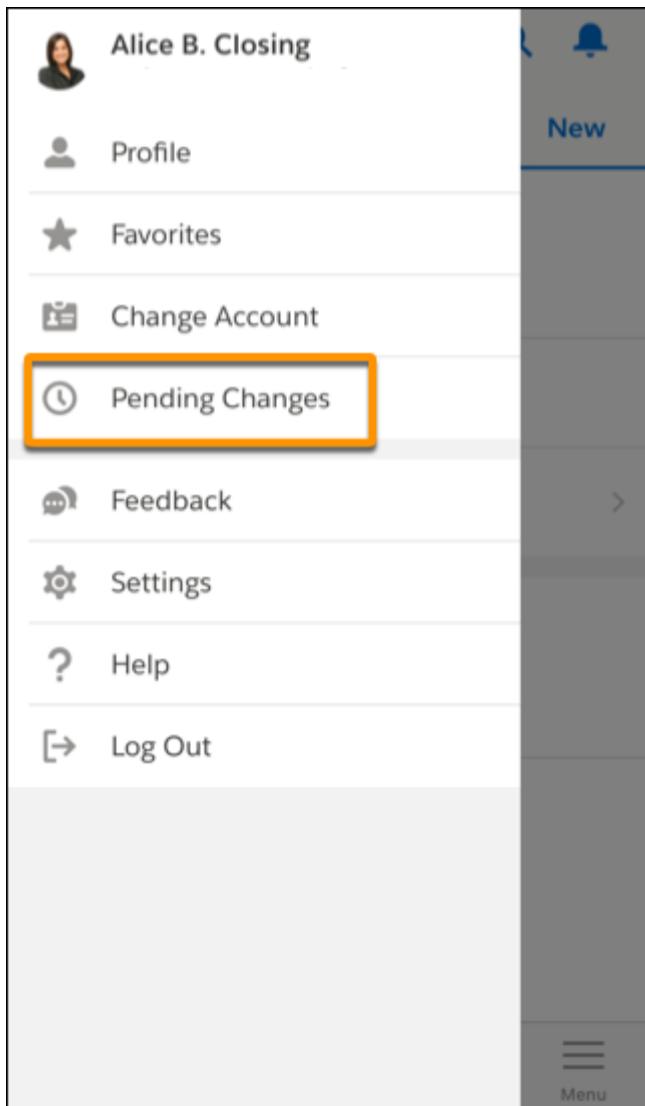
A Salesforce mobile app session is the time between logging in and logging out of the mobile app. Switching away from the Salesforce mobile app doesn't end the session as long as the user doesn't log out.

Create, Edit, and Delete Records in the Salesforce Mobile App While Online or Offline

Whether online or offline, Salesforce mobile app users can create, edit, and delete records and monitor changes from the Pending Changes page. The Salesforce mobile app automatically syncs those pending changes to Salesforce and warns the user if there are conflicts to be resolved.

Keep Track of Updates

Users can monitor all changes made while online or offline from the Pending Changes page. This page is available from the profile menu.



Understanding the Status of Updates

To help users monitor the status of changes made while online or offline, visual indicators display in several places in the Salesforce mobile app, including the Pending Changes page, object home pages, and in the highlights area on updated records.

- The success icon indicates that there are no conflicts to changes made while online or offline. Records disappear from the Pending Changes page after successfully syncing to Salesforce.
- The conflict icon indicates that there are conflicts to changes that must be resolved.
 - If the changes are made while online, the conflict icon appears immediately to indicate that there are conflicts.
 - If the changes are made while offline, the conflict icon appears when network connectivity is restored to indicate that there are conflicts.

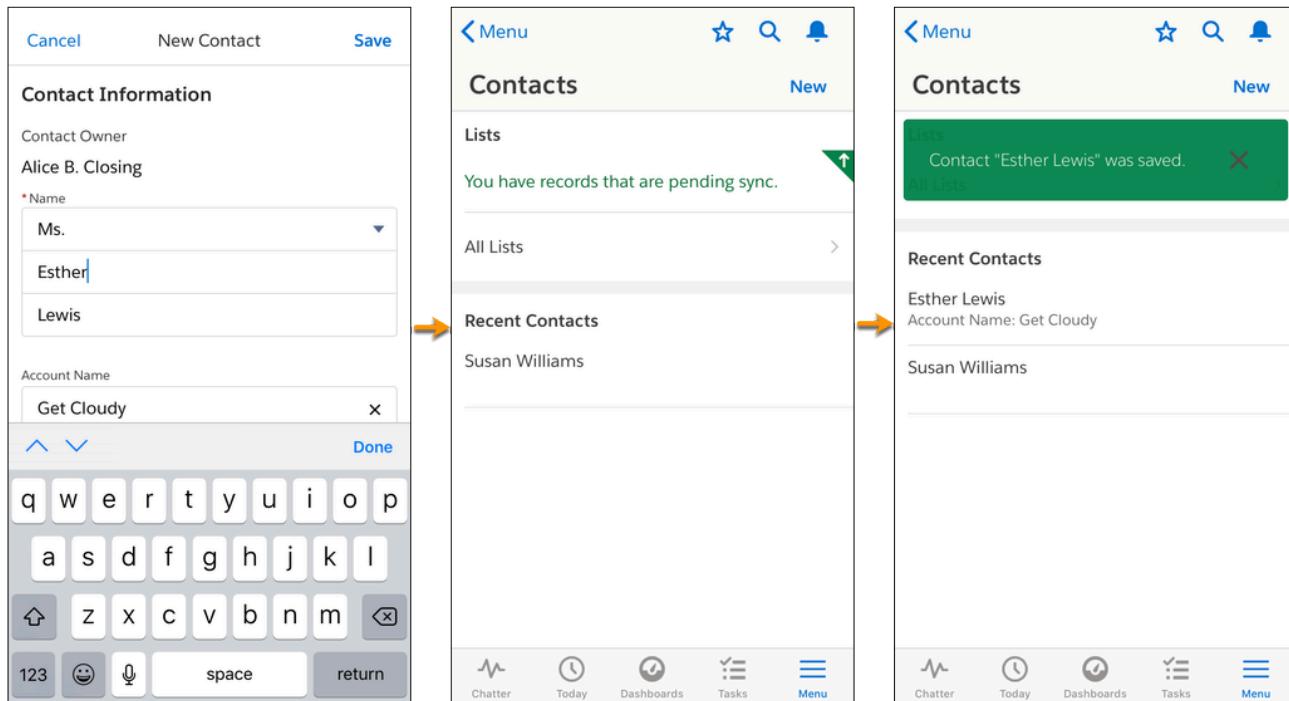
Pending changes contain conflicts for several possible reasons:

- Validation rule error
- Apex trigger error

- Workflow rule error
- Duplicate rule error

If users encounter conflicts when saving a record, whether online or offline, they see the details of the error on the Pending changes page. Users tap on a record displaying a conflict icon and they're taken to the Conflict Resolution page to resolve the issue. After the conflict is resolved and a successful sync to Salesforce, the record disappears from the Pending Changes page.

- An error icon  indicates that an error has occurred.
 - If the changes are made while online, the error icon appears immediately.
 - If the changes are made while offline, the error icon appears when network connectivity is restored.
- When users tap on a record with an error, they're taken to the edit page of that record to fix the error. While rare in occurrence, sometimes an error is irreconcilable. For example, if an edit is made to a record while offline and someone else deleted that record from Salesforce, the error that appears on that change is irreconcilable. In this scenario, users can only dismiss the irreconcilable change from the Pending Changes page.



Offline Access: What's Different or Not Available in the Salesforce Mobile App

Learn the differences between the Salesforce desktop site and the Salesforce mobile app.

Access Data While Offline

When caching is enabled, Salesforce for Android and Salesforce for iOS users can access cached data while working offline.

The default data that's cached includes recently accessed records for the five most recently used objects, plus the user's recent tasks and dashboards. Recently accessed records are determined by a user's activities in both the Salesforce mobile app and the Salesforce desktop site, including Salesforce Classic and Lightning Experience. In addition, much of the data that a user accesses throughout a Salesforce session is added to the cache.

Update Data While Offline (Beta)

Differences for updating data while offline.

Create, Edit, and Delete Actions

- Create records using the **New** button on recently accessed object home pages. New record actions in an action bar (such as **New Task**, **New Contact**, or **New** on related lists) aren't supported offline.
- **Edit** and **Delete** actions in the action bar are available for cached records only.

All Other Quick Actions

- All other action bar icons, such as **Log a Call**, **Post**, or **Change Owner**, aren't supported offline.

Dynamic Actions for Custom Object Record Pages on Mobile

- You can enable dynamic actions for custom object record pages for the Salesforce mobile app. With dynamic actions, you assign actions in the Lightning App Builder instead of the page layout and apply filters to control when and where actions appear for users.
- When you use dynamic actions with mobile offline, if the user previously viewed the record page online, they see the dynamic actions when they view the page offline. If the user didn't previously view the record page online, when they view the record offline they see the actions configured in the page layout instead of the dynamic actions.

Record Types for Recent Objects

- Salesforce caches up to 30 of a user's most recently accessed record types per object. If your org has defined more than 30 record types for any of a user's recent objects (that is, the user's five most recently used objects), only the cached record types are available when creating a record offline. And only records matching the cached record types are editable while offline.

Lookups and Picklists

- Dependent lookups and picklists for a cached record aren't supported when offline, unless the user interacted with these elements before the record was cached.
- Lookup filters aren't supported when offline. Users can enter the name of the related lookup record when editing data offline but the app doesn't search for related looked records until the user's mobile device is back online.
- Complex page layouts, with many fields or picklists, can result in records that are too large to cache. If

a user doesn't see expected recently accessed records when offline, this situation might be the reason why. We recommend reevaluating the affected object's page layout to see if you can optimize it for mobile use.

Notes

- Notes that include images aren't available offline.
- Images can't be added to notes when working offline.
- Users can't relate notes to records when working offline.

Events

- If you create an event when working offline, it's in draft mode until Salesforce is back online. However, there's no visual cue on the Events list that the event is still in draft mode.

Tasks

- Users can only create tasks offline if the simplified New Task form on mobile is disabled. From Setup, enter *Activity Settings* in the **Quick Find** box, then select **Activity Settings**. Deselect **Show simpler New Task form on mobile** and click **Submit**.
- Selecting or deselecting checkboxes on tasks isn't supported when offline.

Experience Cloud Sites

- Experience Cloud sites aren't supported when offline.

Help Your Users Succeed with the Salesforce Mobile App

As Salesforce admins, we know that you are the first line of help to your end users when they have questions about using all things Salesforce. Here are some resources to help your end users get the most out of the Salesforce mobile app and address some common situations that differ from the Salesforce full site experience.

[Download and Log In to the Salesforce Mobile App](#)

Most users have access to the Salesforce mobile app by default. It's easy to get started.

[Salesforce Mobile App and Password Manager Apps](#)

Good security practices require long, complex passwords. But typing long, complex passwords on small mobile keyboards is error prone and frustrating. If your org uses password management, your Salesforce for iOS users can use a password manager app to simplify the login process down to a few taps.

[Salesforce Mobile App and Biometric ID](#)

Biometric ID is a secure and convenient way to access the Salesforce mobile app. On capable devices, you can unlock the app with touch or face authentication, instead of a PIN.

[Open Links with One Tap](#)

When Salesforce mobile app users tap Lightning URL and Chatter notification links on their phones, they're taken directly to the mobile app. Learn more about which URL types are supported.

[Configure Deep Linking for the Salesforce Mobile App](#)

Use supported URL schemes for the Salesforce mobile application for Android and iOS to launch Salesforce from a third-party or web application. You can customize a URL scheme to perform a specific action when Salesforce launches. For example, if a user receives an email about a feed post, you can create a link for the user to tap to view the post in the Salesforce Mobile app.

[The Enhanced Contacts Experience \(Beta\)](#)

Enhanced Contacts (beta) is an upgraded experience for interacting with contact lists and records, optimized for phone and tablet use and included with existing licenses.

[Enable Mobile Home for iOS and Android](#)

Mobile Home is a set of configurable, dynamic cards that show personalized information for your users. When users open the Mobile Home page, they can see their reports, recent records, favorites, and more. Each card shows information that's based on what users view in Salesforce. Your users can also easily rearrange, add, and remove cards to customize Mobile Home.

[Managing Your Day with Today in Salesforce for iOS and Android](#)

Today in Salesforce for iOS and Salesforce for Android shows key information for reps on the go. Admins can add the Today item to the navigation menu of Lightning apps and the Mobile Only app.

Download and Log In to the Salesforce Mobile App

Most users have access to the Salesforce mobile app by default. It's easy to get started.

Salesforce is available for iOS and Android devices that meet minimum platform requirements. See [Requirements for the Salesforce Mobile App](#) for details. You can download and install Salesforce from the App Store or Google Play.

After you install the app, launch it from your home screen and log in to your Salesforce account. Create a security PIN if you're prompted to do so.

There are different ways to log in to Salesforce mobile app. The simplest way is to log in with your email address.

See Also

[Log In with Your Email Address](#)

Log In Using Email

1. On the Log In page, tap .
2. Select **Production - Log in with email**.
3. Enter the email address you use with Salesforce.
 - If you have only one Salesforce account, enter your password.
 - If you have more than one Salesforce account, a verification code is emailed to you. Enter the code on the mobile screen. Select your domain org or username from the list.

You're logged in.

Log In with a Username (iOS)

Make sure you're logging in to the correct Salesforce org. By default, Salesforce connects to your production environment. If you want to log in from a custom address such as your org's single sign-on page, or if you want to connect to your sandbox to do some testing, you need the correct web address for the environment. If your admin provided a company-specific My Domain login URL, you need that URL. The same is true to connect Salesforce using an Experience Cloud site URL.

For example, a company-specific My Domain login URL for a production org is in the form

`https://MyDomainName.my.salesforce.com`. A company-specific My Domain login URL for a sandbox org is in the form

`https://MyDomainName--SandboxName.sandbox.my.salesforce.com`. And an Experience Cloud site URL is in the form `https://MyDomainName.my.site.com`. Your admin can provide you with the domain name to use.

To log in to Salesforce for iOS with your username, use these steps.

1. On the Log In page, tap .
2. Select **Production - Log in with username**.
3. Tap  to add a login host, or select one of the predefined instances: **Production** or **Sandbox**.
4. Enter the host name of the new instance. Don't include `http://` or `https://` in the host name.
5. Enter a label for the new instance, if desired.
6. Tap **Done**.
7. Tap the name of the newly created instance, then log in.

Log In with a Username (Android)

Make sure you're logging in to the correct Salesforce org. By default, Salesforce connects to your production environment. If you want to log in from a custom address such as your org's single sign-on page, or if you want to connect to your sandbox to do some testing, you need the correct web address for the environment. If your admin provided a company-specific My Domain login URL, you need that URL. The same is true to connect Salesforce using an Experience Cloud site URL.

For example, a company-specific My Domain login URL for a production org is in the form

`https://MyDomainName.my.salesforce.com`. A company-specific My Domain login URL for a sandbox org is in the form

`https://MyDomainName--SandboxName.sandbox.my.salesforce.com`. And an Experience Cloud site URL is in the form `https://MyDomainName.my.site.com`. Your admin can provide you with the domain name to use.

To log in to Salesforce for Android with your username, use these steps.

1. On the Log In page, tap either  or the menu button on your device.

2. Select **Production - Log in with username**.
3. Tap **Change Server**.
4. Tap **Add Connection**, or select one of the predefined instances: **Production** or **Sandbox**.
5. Enter the host name of the new instance and enter the URL you use to log in to that instance, then tap **Apply**. The host name must start with *https://*.
6. Tap the name of the newly created instance, then tap **Apply**.
7. Log in.



Note

- If you're not able to log in, verify with your Salesforce admin that you have access to the Salesforce mobile app.
- If you see a prompt that says "Chatter Wants to Use salesforce.com to Sign In," accept it to log in to the Salesforce mobile app.
- You can be logged into the Salesforce mobile app on five devices concurrently. If you log into the Salesforce mobile app using a sixth device, you receive a message indicating that five login sessions exist. The oldest session is automatically logged out.

If you're still unable to log in, ask your admin for help.

Switch Accounts in the Salesforce Mobile App

When you're logged in to the app, you can quickly switch between multiple accounts. Tap **Profile Menu** | **Change Account**.

Salesforce Mobile App and Password Manager Apps

Good security practices require long, complex passwords. But typing long, complex passwords on small mobile keyboards is error prone and frustrating. If your org uses password management, your Salesforce for iOS users can use a password manager app to simplify the login process down to a few taps.

Salesforce for iOS integrates with 1Password™, LastPass™, or other password manager apps that support the iOS password manager extension. After you set up password management for your org, Salesforce

users simply tap on the login page then select a password manager app from the list.



Salesforce Mobile App and Biometric ID

Biometric ID is a secure and convenient way to access the Salesforce mobile app. On capable devices, you can unlock the app with touch or face authentication, instead of a PIN.

To use biometric ID credentials, your admin must require a PIN to unlock the app. When you have a

biometric ID enabled on your device, you're prompted to allow unlocking with biometric ID credentials when you first launch the app.



Note You can't use biometric credentials to log in to the Salesforce mobile app.

Open Links with One Tap

When Salesforce mobile app users tap Lightning URL and Chatter notification links on their phones, they're taken directly to the mobile app. Learn more about which URL types are supported.

Universal Links and Android App Links aren't supported on Mobile Publisher instances of the Salesforce mobile app. To link to specific pages on Mobile Publisher instances, see [Configure Deep Linking for the Salesforce Mobile App](#).

iOS

When users on iOS 14 or later tap on these types of links on their phones, they're taken to the correct page in the mobile app.

- All links from Chatter notification emails with `?fromEmail=1`
- Record links beginning with `/lightning/r/`
- Record links with a record relationship page specified, such as Chatter or Related Lists; `lightning/r/<recordType>/<recordId>/view?target=<tabname>`
- Object home and list links beginning with `/lightning/o/`



Note Links to the Recently Viewed list go to the object home page.

- Custom tab links beginning with `/lightning/n/`
- Chatter home links with `/lightning/page/chatter`
- Quick action links with `/lightning/action/quick`

For other links that were previously supported, users are taken to an "Open in Salesforce?" popup. iPhone users without the app installed are prompted to install it.

This feature also works on iPad for users who have the Salesforce mobile app installed on their device. iPad users without the app installed are taken to the page in Lightning Experience on their browsers.

Android

When users tap on these types of links on their phones, they're taken directly to the mobile app.

- Lightning links beginning with `/lightning/`, including record home, object home, listviews, and custom tabs
-
- Note** Links to related lists go to the record home page. Links to the Recently Viewed list go to the object home page.

- Record links with 15-digit IDs, including links from Chatter email notifications
- Record links with a record relationship page specified, such as Chatter or Related Lists; `lightning/r/<recordType>/<recordId>/view?target=<tabname>`

Configure Deep Linking for the Salesforce Mobile App

Use supported URL schemes for the Salesforce mobile application for Android and iOS to launch Salesforce from a third-party or web application. You can customize a URL scheme to perform a specific action when Salesforce launches. For example, if a user receives an email about a feed post, you can create a link for the user to tap to view the post in the Salesforce Mobile app.

Salesforce-supported URL schemes allow your users to launch the Salesforce Mobile app and perform one of several actions.

- View a specific record in Salesforce, such as a record page, object home page, or feed post.
- View and download files.
- Follow a user and navigate to the user profile page.



Note For a better experience on iOS, we recommend using universal links instead of URL schemes.
For more information, see [Open Links with One Tap](#).

Salesforce App URL Scheme Format

You can use two different formats to make a request to a Salesforce URL scheme.

Additional Query Parameters

Salesforce Mobile app URL schemes support additional, optional query parameters. These parameters let you create links for users who belong to multiple organizations or Experience Cloud sites such that they can be correctly redirected.

Salesforce App URL Scheme Format

You can use two different formats to make a request to a Salesforce URL scheme.

For all actions, except viewing an object's home page, use this format.

```
<scheme_name>://sObject/<id>/<action>
```

To view the home page of an object, rather than a specific record, use the object's name and the `home` action.

```
<scheme_name>://sObject/<ObjectName>/home
```

Let's break down each parameter of the URL scheme format.

- `scheme_name` –A supported Salesforce scheme name.
- `sObject` –Indicates a single instance of a Salesforce object.
 -  **Note** This parameter supports persisted data types besides sObjects, such as Apex. See [An Introduction to Apex](#) for more information.
- `id` –The unique single instance of a Salesforce object, a specific record, referenced by ID. Salesforce object `id` lengths of both 15 and 18 characters are supported.
- `ObjectName` –The API name of a Salesforce object. This value is case-sensitive. For example, use `Account`, not `account`.
- `action` –A supported URL scheme operation.

Scheme Names

The Salesforce Mobile app supports the following values for scheme name in deep link URLs.

- `salesforce1://`

Actions

The Salesforce Mobile app supports a number of different record- and object-specific actions in deep links.

These are the available `action` parameters for URL schemes.

- `view` –Navigates the user to the Salesforce app to view a record in detail.
- `edit` –Navigates the user to the edit detail page of a record.
- `home` –Navigates the user to the home page of an object.
- `download` –Download any version of a file.
- `follow` –Follow users to see their posts, comments, and likes in your feed.

View a Record

Use this URL scheme to view a record detail page.

```
<scheme_name>://sObject/<id>/view
```

This example navigates to an Account record detail page:

```
salesforce1://sObject/001D00000Jwj9v/view
```

-  **Note** The user must have permission to view the record.

Edit a Record

Use this URL scheme to edit a record.

```
<scheme_name>://sObject/<id>/edit
```

This example navigates to an Opportunity record edit page.

```
salesforce1://sObject/006R0000001r7Rq/edit
```

 **Note** The user must have permission to edit the record.

Navigate to Record Home

Use this URL scheme to navigate to the home page of an object.

```
<scheme_name>://sObject/<ObjectName>/home
```

This example navigates to the Opportunity home page.

```
salesforce1://sObject/Opportunity/home
```

 **Note** The `ObjectName` value is case-sensitive and requires the API name of the object.

Download a File

Use this URL scheme to view and save offline (download) a Salesforce file.

```
<scheme_name>://sObject/<id>/download
```

This example navigates to a document and downloads it to save it offline.

```
salesforce1://sObject/069R0000000mr3/download
```

 **Note** The user must have permission to view or download the file. The `download` action only supports `ContentDocument` and `ContentDocumentVersion` objects. The download action for Android only opens the file, and doesn't save it offline.

Follow a User

Use this URL scheme to follow a user and navigate to their profile page.

```
<scheme_name>://sObject/<id>/follow?userid=<target_user_id>
```

The URL scheme navigates to the profile page if the user is already being followed.

- `?userid=<target_user_id>` : The `target_user_id` is the user ID of which the URL scheme link (for example, via email) to follow a user is sent to. Currently the Salesforce mobile app will only follow the target profile page if the `<target_user_id>` matches that of the current user.

This example follows the target `<userid>` and navigates to their profile page.

```
salesforce1://sObject/005R0000000Df5W/follow?userid=005R000000HfcF
```

 **Note** The `follow` action only supports `User` object.

Additional Query Parameters

Salesforce Mobile app URL schemes support additional, optional query parameters. These parameters let you create links for users who belong to multiple organizations or Experience Cloud sites such that they can be correctly redirected.

The additional query parameters append to the Salesforce URL scheme format:

```
<scheme_name>://sObject/<id>/<action>?<query_parameter>
```

Query Parameters

Query parameter values are required for an optimal experience when navigating users via URL schemes.

The more query parameters are appended to URL schemes, the more accurately users can be redirected. If no query parameters are appended to URL schemes, the likelihood of users getting misdirected increases.

- `s1oid=<orgID>` : The `orgID` is the organization ID of the organization that contains the content. If users are logged in to the same org ID, they are directed to the content. If users aren't logged in to the same org ID, they are redirected to the login screen.
 **Note** If users aren't logged in to the same org ID on Android, they aren't redirected to the login screen.
- `s1nid=<networkID>` : The `networkID` is the network ID for the Experience Cloud site that contains

the content. The network ID is null if the site is internal or no site is specified. Users are directed to the correct site after the org ID is validated.

- `s1uid=<userID>` : The `userID` is the user ID of the user who has access to the data. If a user with a different `userID` than the one defined in the query parameter has access to the same org or site, that user gets redirected to the same data.
- `iosoru=<URL>` : The `URL` is the address where the Salesforce mobile app prompts to redirect users if it can't direct them to the intended URL scheme.

View a Record in a Specific Organization

Use this URL scheme to navigate to a specific org and view a record detail page.

```
<scheme_name>://sObject/<id>/view?s1oid=<orgID>
```

This example navigates to an Account detail page in a specific org:

```
salesforce1://sObject/001D000000Jwj9v/view?s1oid=00DT0000000ABC
```

-  **Note** If the user isn't logged in to the specified org, the user is redirected to the login screen. The user must have permission to view the record.

Edit a Record in a Specific Organization and Experience Cloud Site

Use this URL scheme to navigate to a specific org, Experience Cloud site, and edit page for a record.

```
<scheme_name>://sObject/<id>/edit?s1oid=<orgID>&s1nid=<networkID>
```

This example navigates to an Account detail page:

```
salesforce1://sObject/001D000000Jwj9v/view?s1oid=00DT0000000ABC&s1nid=00UT0000000XYZ
```

-  **Note** If the user isn't logged in to the specified org or site, the user is redirected to the login screen. The user must have permission to edit the record.

The Enhanced Contacts Experience (Beta)

Enhanced Contacts (beta) is an upgraded experience for interacting with contact lists and records, optimized for phone and tablet use and included with existing licenses.

 **Note** This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

Contacts is a highly trafficked and essential area within the Salesforce Mobile App. Enhanced Contacts (beta) is a native contacts experience, tailored for easier and faster access to contacts. The current contacts experience requires numerous taps, making it inconvenient, and lacks sought-after capabilities.

With Enhanced Contacts (beta), users can readily view recent contacts and lists, access caller ID for Salesforce contacts, enjoy easier contact search, use swipe actions, import and export contacts (in bulk or singularly), customize contact detail views, and more.

Requirements

The new Enhanced Contacts (beta) experience has been built to work on both phone and tablet interfaces on all currently supported iOS and Android devices. For more information, see [Requirements for the Salesforce Mobile App](#).

Enable Enhanced Contacts

Admins can enable this beta feature for their org using the Mobile Feature Panel. From Setup, in the Quick Find box, enter *Salesforce Mobile App*, and then toggle Enhanced Contacts (Beta) to on. 

One enabled in an org, end users can toggle **Enhanced Contacts** on from the existing Contacts interface in the app.



Any existing Lightning app that features the Contacts area is able to participate in Enhanced Contacts. Users can easily toggle between both contacts' experiences to try them out.

When Enhanced Contacts (beta) is on, the app uses the new contacts experience instead of the Lightning-based contacts experience. You can only use one contacts experience at a time.

To return to the existing Lighting-based contacts experience, navigate to the contacts home page and toggle off **Enhanced Contacts (Beta)**.

Features of Enhanced Contacts (beta)

- New, native contact home
 - Readily view recent contacts and lists
- Swipe actions for calling and emailing
- Enhanced import support
 - Bulk import
 - Triage zone for failed imports

- Single and bulk export
- Customizable contact detail views
- Caller ID lookup

Native Contact Home

- Easily access recently viewed contacts and lists.

Swipe Actions

- You can now swipe left on a contact to quickly email or call them without having to open the full contact record. After the phone or email option is tapped, another menu opens with the contacts' different phone numbers and email addresses.



Import Support

- In the older contacts experience, import must be done one-by-one. In Enhanced Contacts (beta), you can bulk import contacts (and continue to do so one-by-one).



When importing, there's a triage zone for failed contacts, where you can return later to add the required fields and then complete the import.



Note If a contact failed to import and hasn't been updated and saved, those contacts are deleted when you log out or import again.



Export Support

- In the older experience, there's no export capability. Single and bulk export capabilities have been added to allow users to export contacts to their device, both from within a list or while viewing a single contact.



Customizable Contact Detail Views

- We introduced a native detail page that shows information based on the compact layout defined in the org. This page allows you to see the fields you care about the most.



Note If a field isn't mobile compatible, it isn't shown in the app.

Caller ID Lookup

- You can now use Caller ID lookup from the Salesforce database. This feature gives automatic lookup of incoming calls without exporting contacts from Salesforce to your phone.

Beta Limitations

- Importing Contacts - Required Fields
 - On import, the app doesn't respect page layout-required fields. Last Name is the only required field for an import.
- Contact Duplication
 - The Salesforce Mobile App doesn't control duplication. For information on checking and editing your org's duplication rules, see [Standard Contact Duplicate Rule](#).
- Samsung Caller ID
 - Caller ID doesn't work on Samsung devices.

How to Send Feedback

Within the app there's a feedback card at the bottom of the Enhanced Contacts (beta) home page. Leave feedback by tapping on that and filling out the feedback form.



Also, you can email mobilefeaturefeedback@salesforce.com with further feedback.

Enable Mobile Home for iOS and Android

Mobile Home is a set of configurable, dynamic cards that show personalized information for your users. When users open the Mobile Home page, they can see their reports, recent records, favorites, and more. Each card shows information that's based on what users view in Salesforce. Your users can also easily rearrange, add, and remove cards to customize Mobile Home.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: both Salesforce Classic and Lightning Experience

Setup available in Salesforce Classic in: all editions except **Database.com**

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

User Permissions Needed

To enable Mobile Home:	Customize Application
------------------------	-----------------------

Want to see Mobile Home in action? Watch the [Mobile Home demo](#) (3 minutes)

Enable Mobile Home

Mobile Home is a standard navigation item that can be added to any Lightning app. From Setup, in the

Quick Find box, enter *App Manager*, and then select **App Manager**. Click the arrow next to the Lightning app you want to modify and select **Edit**. Then click **Navigation Items**. Find Mobile Home in the left column and add it to the right column. We recommend adding it as the first tab so that users can see it when they open the app. To ensure Mobile Home is visible to users, check that the **Tab Setting** for Mobile Home is set to *Default On*.

As of February 28, 2022, users are able to instantly add the Mobile Home feature to their Lightning apps themselves. When a user navigates to the menu tab, they see a prompt to add Mobile Home to this Lightning App. Tapping on ‘Add to App’ adds Mobile Home as a navigation item on the tab bar. It can be reordered just like other areas in the app by tapping the Edit button on the current Lightning App.

This navigation item only appears in the Salesforce mobile app and not for desktop users.

Admins can disable user's access to Mobile Home enablement from Setup.

1. In the Quick Find, enter *Connected Apps* then select **Manage Connected Apps**.
2. Open Salesforce for iOS or Salesforce for Android.
3. Navigate to Custom Attributes and select **New**.
4. For Attribute key, enter *ENABLE_MOBILE_HOME_PROMPT*.
5. For Attribute value, enter "*FALSE*" then select **Save**.



Example

The screenshot shows the 'Navigation Items' configuration screen in the Lightning App Builder. The 'Selected Items' list on the right includes 'Mobile Home' (highlighted with an orange border), Chatter, Opportunities, Leads, Contacts, Knowledge, Reports, Dashboards, People, Cases, and Calendar. The 'Available Items' list on the left includes Action Plan Templates, Action Plans, App Launcher, Approval Requests, Assessment Indicator Definitions, Assessment Task Content Documents, Assessment Task Definitions, Assessment Task Orders, Assessment Tasks, and Assets.



Tip For bests results, use Mobile Home with the 234.000 version of the Salesforce mobile app or later.



Note If you haven't enabled any Lightning apps for mobile, you can use the [Mobile Only navigation](#)

[method](#) instead.

Mobile Home is automatically configured for each of your users based on how they use Salesforce. Users can also add and remove cards to create a more personalized home page on mobile.

The screenshot shows the Salesforce mobile application interface. At the top, there is a header bar with the time (9:41), signal strength, battery level, and user profile icon. Below the header, the word "Home" is displayed in bold black text, and "Edit" is in blue text. There are search and notification icons.

Pinned Report:

My Pipeline

Sum of Amount
\$2,801,907.04

Sum of Expected Revenue
\$1,609,042.30

Stage	Sum of Amount	Sum of Expected Revenue
Qualification	\$915,049.95	\$166,209.99
Discovery	\$406,076.67	\$142,126.83
Proposal/Quote	\$496,300.00	\$372,225.00

View Report

Recent:

Records and Lists

- Angela Potter
User
- * Sales Executive Dashboard

Bottom navigation bar:

- Home
- Chatter
- Opportunities
- Leads
- Menu

Available Cards to Use

These cards are available for Mobile Home.

- Pinned Report: Overview of the user's chosen report.
- Recent: Recently viewed records or lists.
- My Calendar: The current day's events from the user's native mobile calendar app.
- Salesforce Events: Salesforce Events scheduled for the day.
- Tasks: Upcoming tasks assigned to the user.
- Favorites: Items that the user added to their Favorites.
- Pinned List: A list of frequently used records and objects.



Note Events in the My Calendar card are private to the user and aren't automatically imported into Salesforce.

Pinned Report



My Pipeline

Sum of Amount

\$2,801,907.04

Sum of Expected Revenue

\$1,609,042.30

Stage	Sum of Amount	Sum of Expected Revenue
Qualification	\$915,049.95	\$166,209.99
Discovery	\$406,076.67	\$142,126.83
Proposal/Quote	\$496,300.00	\$372,225.00

Favorites

Favorites



Larry Baxter

Account



My Pipeline

Report



Top Marketing Channels

Report



Wes Chopra

Contact



Paul Partner

Contact

Edit a Mobile Home Page

Users can customize their Mobile Home page's cards to show only their essential data.

To edit the Mobile Home page, tap **Edit** to add, remove, and rearrange cards. From here, users can also change which report appears on the Pinned Report card or select specific calendars for the My Calendar card.

The screenshot shows the Salesforce mobile application's home screen. At the top, there is a header bar with the time "9:41" and signal strength indicators. Below the header, there are three main buttons: "Cancel", "Edit Home", and "Save". A large button labeled "Add Card" is centered above a horizontal separator bar.

The main content area is organized into several sections:

- Favorites**: A section containing a card labeled "Favorites" with a red minus sign icon. It includes a "Pinned Report" card.
- Top Marketing Channels**: A section containing a card labeled "Top Marketing Channels" with a red minus sign icon. It includes a "Select Report" button.
- Upcoming**: A section containing a card labeled "Upcoming" with a red minus sign icon. It includes a "Tasks" card and a "My Calendar" card.
- Today**: A section containing a card labeled "Today" with a red minus sign icon. It includes a "Select Calendars" button.
- Salesforce Events**: A section containing a card labeled "Salesforce Events" with a red minus sign icon. It includes a "Today" card.
- Pinned Report**: A section containing a card labeled "My Pipeline" with a red minus sign icon. It includes a "Select Report" button.

At the bottom, there is a "Recent" card with a black horizontal bar next to it.

Upgrade from Mobile Home Beta

If you already use Mobile Home Beta, we recommend switching to the new generally available version. The new version uses standard navigation items as the official mechanism, which allows you to control who in your organization sees Mobile Home and to move it to any position in the menu. To upgrade, remove the Custom Attribute from your connected apps. From Setup, in the Quick Find box, enter *Connected Apps*, and then click **Manage Connected Apps**. Click the name of the connected app that you want to modify. Remove the **ENABLE_MOBILE_HOME** custom attribute in the Custom Attribute section. Then, use the enable steps at the beginning of this guide to use your apps with the upgraded version.

Differences from Beta to GA

iOS	Android
Global Action bar removed	Favorites card added
	My Calendar card added

Managing Your Day with Today in Salesforce for iOS and Android

Today in Salesforce for iOS and Salesforce for Android shows key information for reps on the go. Admins can add the Today item to the navigation menu of Lightning apps and the Mobile Only app.

REQUIRED EDITIONS

The Salesforce mobile app available in: all editions except **Database.com**

The Salesforce Today app is available in Salesforce for Android and Salesforce for iOS. It's not available in the Salesforce desktop site. To start using Today, tap Today in the Salesforce mobile app navigation menu and give Salesforce permission to access the calendar on your phone.

Today includes these cards, in this order:

Card	Description
Current Event	The next event from your phone's calendars.
Agenda	Today's events from your phone's calendars.
My Tasks	Today's Salesforce tasks.
My Recent Records	Your recently visited Salesforce records.
To Me Feed	The most recent posts from the To Me feed. Tap More to open the full To Me

Card	Description
	feed.
News	News feed items tailored to you. To see up to 10 top news items, tap More . This item requires admin setup. See News in Salesforce Help for more information.
Dashboard	The first chart from your most recently visited dashboard, if you have permission to view dashboards.

Considerations When Using Today for iOS and Android

- Access to Today is available only if you grant Calendar permission to the Salesforce mobile app.
- Chatter Free and Chatter External users aren't able to access Today because these user license types don't have access to contacts or person accounts.
- All of the Today cards update when you access Today from the navigation menu. But the cards aren't automatically updated if you navigate to Today other ways (for example, by using the Back button). Cards also aren't automatically updated when you take an action that affects the information shown in Today, such as creating a task. To update the Today page, pull to refresh.
- The set of actions that are available are those that are defined on the global publisher layout.
- Current Event and Agenda Cards:
 - Salesforce for Android and iOS selects only from Calendar Events that are stored locally on the mobile device. Salesforce events aren't available. To change which calendars on your mobile device are used, tap the gear icon on the Today page.
 - If some or all of your calendar servers don't automatically push data to your device, update your calendars to see the most current information in Today.
 - The 24-hour time format isn't supported.
 - For multiday events, only the ending date and time are shown in the highlights area.
 - For recurring multiday events, the wrong date and time can sometimes be shown.
 - If your calendar doesn't display invitee names because the list is too long, Today shows a count of "1 invitee" in the Current Event and Agenda cards on the main view and doesn't show any invitees when you open the event.
 - For iCloud events, Today can't find a matching Salesforce record for a meeting organizer because the iCloud API doesn't return an email address.
 - Today uses the mobile device's time zone setting, while Salesforce events respect the user's Salesforce time zone setting. If there's a difference between these settings when a user logs a local event from Today, the Time field in the new Salesforce event record reflects the user's Salesforce time zone and doesn't match the time of the local event.
 - On Android devices, a meeting organizer's name might not display correctly if there isn't a matching Salesforce record for the person.
 - If another user makes updates to a mobile calendar event record while you're viewing the record in Today on an Android device, you don't automatically see the changes. The record is refreshed the next time you select it from the Today main view.
 - Because of how the Android operating system identifies local events, if a user accesses Today on an Android device to log a local event in Salesforce, then views the same event in Today on a different Android device or an iOS device, it might look like the event wasn't logged and it isn't possible to

access the corresponding Salesforce event from Today. The logged event status and link is correct on the original Android device, however.

- To Me Feed Card:
 - Only posts that are less than 72 hours old are included. If all posts in your To Me feed are older, you don't see this card.
- News Card:
 - You see this card if News is enabled for your org.
 - If there aren't any relevant account-related news items to show, you don't see this card.

Simplify Daily Tasks with Einstein Generative AI in the Salesforce Mobile App

Einstein Generative AI features including Agentforce and Prompt Builder allow your users to streamline daily tasks and be even more productive. Ask Agentforce to summarize records, draft emails, show related records, and execute all your custom agentic actions in a conversational and intuitive experience on the Salesforce mobile app.

Use Einstein on the Salesforce mobile app as soon as it's enabled for your Salesforce org. On iOS devices, activate Siri or Dictation to use voice commands seamlessly in your agentic experience. When Salesforce admins create prompt templates, some setup can be required for the Salesforce mobile app.

Watch the video: <https://play.vidyard.com/YT1gEj5WZ8gmJQyR2U9ndR?>

[Use Field Generation Templates for the Salesforce Mobile App](#)

After your Salesforce admin sets up a field generate prompt template, take additional steps to allow your users to generate content for fields.

[Considerations for Agentforce in the Salesforce Mobile App](#)

Carefully review limitations and considerations when using Agentforce in the Salesforce mobile app.

See Also

[Einstein Copilot](#)

[Prompt Builder](#)

Use Field Generation Templates for the Salesforce Mobile App

After your Salesforce admin sets up a field generate prompt template, take additional steps to allow your users to generate content for fields.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions** with the Einstein for Sales,

Einstein for Service, or Einstein Platform add-ons.

USER PERMISSIONS NEEDED

To view Salesforce mobile app settings:

View Setup and Configuration

To modify Salesforce mobile app settings:

Customize Application

1. [Enable dynamic forms on mobile.](#)
2. [Add the prompt template to the Lightning Page.](#)
3. Activate the Lightning page.

Considerations for Agentforce in the Salesforce Mobile App

Carefully review limitations and considerations when using Agentforce in the Salesforce mobile app.

These considerations are in addition to [the ones in effect when using agents on desktop](#).

- Rich text components on the Salesforce mobile app don't support the full set of HTML tags or styling provided in the Formatted Rich Text Lightning web component.
 - **img** tags aren't rendered
 - Unsupported tags: **li**, **ol**, **ul**
- Agentforce dictation services are only available for on-device languages. Download support for specific languages on your device to use Agentforce dictation. See [Apple supported languages for dictation](#) and [Android language settings](#)

View Optimized Lightning Reports with Enhanced Reports

In this improved reports experience for iOS and Android, you get a responsive user interface for quick and efficient consumption on mobile devices.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Enhanced Reports enables you to view your Lightning reports in a mobile-friendly interface without reconfiguring report formats. Creating new reports and editing reports are still done on the full desktop site, with those changes automatically rendering on mobile.



Set Up Enhanced Reports in the Salesforce Mobile App

Manage Enhanced Reports access for all your users.

Open Enhanced Reports on Mobile

Open existing Lightning reports at anytime and make timely decisions without gaps or limitations.

View Enhanced Reports Formats on Mobile

Reports for your mobile device are presented in several formats that help you view and understand data effectively.

Interact with Enhanced Reports on Mobile

With reports on your mobile device, you can easily sort rows, open records, refresh reports, and share.

Submit Enhanced Reports Feedback

You can expect to be occasionally asked to share your feedback with us through the app's feedback mechanism.

Enhanced Reports Considerations and Limitations

Enhanced Reports supports platforms for iOS and Android. However, keep these considerations and limitations in mind.

Set Up Enhanced Reports in the Salesforce Mobile App

Manage Enhanced Reports access for all your users.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS NEEDED

To view Enhanced Report settings: View Setup and Configuration

To modify Enhanced Report settings: Customize Application

1. From Setup, in the Quick Find box, enter *Salesforce Mobile App* and click the link.
2. To view Enhanced Lightning Reports, switch the Enhanced Lightning Reports (GA) setting to **Enabled**.
3. To turn off Enhanced Lightning Reports, switch to **Disabled**.



Open Enhanced Reports on Mobile

Open existing Lightning reports at anytime and make timely decisions without gaps or limitations.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS NEEDED

To view Lightning reports: Run Reports

1. Open and log into the Salesforce Mobile app.

2. Tap the report you want to view.

Your report on mobile starts with the report name (1) followed by a summary Information ribbon (2) and the report header row and data (3).



View Enhanced Reports Formats on Mobile

Reports for your mobile device are presented in several formats that help you view and understand data effectively.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Tabular Reports

Tabular reports are the simplest and fastest way to view your data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns with each matching record listed in a row.

Data appears below the summary information ribbon to fit the allotted width and the height of the mobile screen. Tabular report summary information includes total records and the total aggregates for any of the measure columns. Similar to the desktop experience, up to 2000 rows of data are displayed in the report. The total number of records and aggregates, as seen in the summary information, is based on all rows. Tap the  icon for more information.

Total Records	Sum of Annual Revenue
⚠ 2180	USD 788,092,514,845.00
This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.	
2	Bill Johnson
	Doyle Inc [22]

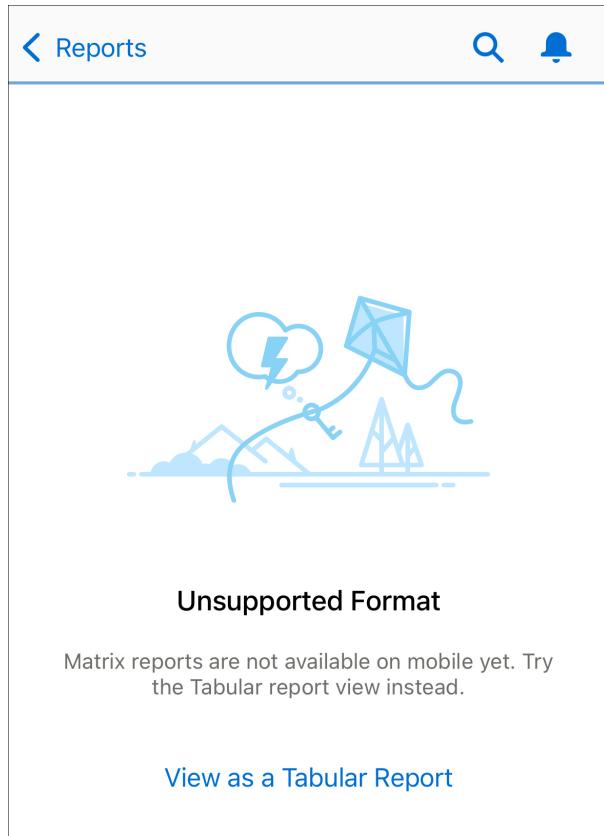
Summary Reports

Summary reports are similar to tabular reports, but have more options to organize data and generate calculations, such as total sales by account manager. Summary information includes total records and aggregate summaries.

Industry		Account Name	Oppo
Agriculture	Ingram Inc [675]	Oppo	
	Thompson Inc [500]	Oppo	
	Bell Inc [158]	Oppo	
	Clarke Inc [305]	Oppo	
	Shaw Inc [425]	Oppo	
	Webster Inc [366]	Oppo	
	Clarke Inc [305]	Oppo	
	Moody Inc [255]	Oppo	
	Jones Inc [609]	Oppo	
	Bush Inc [976]	Oppo	

Matrix Reports - Not Supported

Matrix reports aren't supported, but there's an option to automatically render the report into a tabular format. When you open a Matrix report, a message appears with a link to view the tabular report.



Interact with Enhanced Reports on Mobile

With reports on your mobile device, you can easily sort rows, open records, refresh reports, and share.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

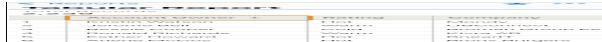
Open a Record from a Report

Open records from reports with columns that appear in blue. Tap the column cell, which brings you to the corresponding record in the Salesforce app.



Sort in a Report

Tap any column header to sort the report by that field. Subsequent taps on the same header change the sort order from ascending to descending and back.



Summary reports that are sorted by groups and aggregate columns can be sorted on a single field by tapping any column header in that report.

Refresh a Report

Tap more options (1) then Refresh (2) anytime you want to refresh a report. The report query runs again, cache is discarded, and the table is updated with the latest data.



Share a Report

Tap more options (1) then Share (2).



Submit Enhanced Reports Feedback

You can expect to be occasionally asked to share your feedback with us through the app's feedback mechanism.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

1. To continue, tap **Yes** or to close the feedback prompt, tap **No**.



2. Enter your comments in the My feedback is... space, otherwise tap **Back** to exit.
3. Tap the slider if you're open to being contacted.
4. To submit feedback, tap **Send**.



Enhanced Reports Considerations and Limitations

Enhanced Reports supports platforms for iOS and Android. However, keep these considerations and limitations in mind.

iOS

Feature	Notes about Enhanced Reports Availability
Device	Enhanced Reports supports iOS phones and tablets.
Phone Orientation	Portrait orientation is only available for phones.
Tablet Orientation	Portrait and landscape orientations are available for tablets.
Display Options	Display options such as row counts, detail rows, subtotals, grand total aren't supported.
Report Formats	Tabular and Summary reports are supported.
Unsupported Report Formats	Joined and Matrix reports aren't supported. Matrix reports can be viewed in Tabular format.
Conditional Highlighting	Conditional Formatting isn't supported.
Share Reports	Folder sharing to share a report isn't supported.
Favorite Reports	Favorite a report isn't supported.
Report Notifications	Report Notifications isn't supported.
Global Search	Global search isn't supported.
Filter	Relative date filters aren't supported on iOS mobile devices.
Images	The Image function isn't supported on iOS mobile devices.

Android

Feature	Notes about Enhanced Reports Availability
Device	Enhanced Reports supports Android phones and tablets.
Phone Orientation	Portrait orientation is only available for phones.
Tablet Orientation	Portrait and landscape orientations are available for tablets.
Display Options	Display options such as row counts, detail rows, subtotals, grand total aren't supported.

Feature	Notes about Enhanced Reports Availability
Report Formats	Tabular and Summary reports are supported.
Unsupported Report Formats	Joined and Matrix reports aren't supported. Matrix reports can be viewed in Tabular format.
Conditional Highlighting	Conditional Formatting isn't supported.
Share Reports	Folder sharing to share a report isn't supported.
Favorite Reports	Favorite a report isn't supported.
Report Notifications	Report Notifications isn't supported.
Global Search	Global search isn't supported.
Filter	Relative date filters aren't supported on Android mobile devices.
Images	The Image function isn't supported on Android mobile devices.

Unless otherwise noted in the table above, the limitations mentioned in [Reports and Dashboards: What's Different or Not Available in the Salesforce Mobile App](#) also apply.

Consolidate Your Data with Unified Analytics

Unified Analytics is your home base for all your analytics on your iOS and Android devices. Go to the section for your operating system to get more details about Unified Analytics, such as navigation and finding items.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

A CRM Analytics license is required to view and access CRM Analytics items.

Unified Analytics is enabled from the full desktop site, which turns it on for mobile and desktop.

1. From Setup, in the Quick Find box, enter *analytics*, and then select **Settings**.
2. Select **Enable the Unified Experience for Analytics Home**.

[Navigate Unified Analytics on iOS](#)

Unified Analytics is a modern and welcoming environment on iOS to organize, locate, and share your analytics.

[Navigate Unified Analytics on Android](#)

Unified Analytics is a modern and welcoming environment on Android to organize, locate, and share your analytics.

Navigate Unified Analytics on iOS

Unified Analytics is a modern and welcoming environment on iOS to organize, locate, and share your analytics.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

A CRM Analytics license is required to view and access CRM Analytics items.

To open Unified Analytics, tap **All Items**, and select **Analytics** in the Salesforce Mobile app.



Unified Analytics Home Page

Feature	Description
Browse	Shows all your analytics organized by type.
Favorites	Preferred analytics for quick access.
Collections	Curated analytics to customize your space.
Watchlist	Monitor important metrics from CRM Analytics dashboards.
Recents	Shows your most recently opened analytics by type.
Pinned Collections	Shared collections posted to your home page.
My Analytics	Groups your watchlist, favorited and shared analytics.

Note Watchlist requires a CRM Analytics license.

[Find Your Assets in Unified Analytics](#)

Locating your analytics assets is quick and easy with efficient organization in Unified Analytics Home.

[Manage Analytics Assets in Unified Analytics](#)

The asset details page contains helpful information about the asset with actions to help you manage

them.

Curate Your Analytics with Collections

Collections enable you to curate your own set of analytics from any CRM Analytics app or Lightning folder.

Monitor CRM Analytics Dashboard Metrics in Unified Analytics

Watchlist in Unified Analytics enables you to track KPIs and trends across different dashboards.

Get Additional Insights from a Dashboard Widget

Launch interactive navigation from a static dashboard widget with single-click interactions on your iOS devices.

Find Your Assets in Unified Analytics

Locating your analytics assets is quick and easy with efficient organization in Unified Analytics Home.

REQUIRED EDITIONS

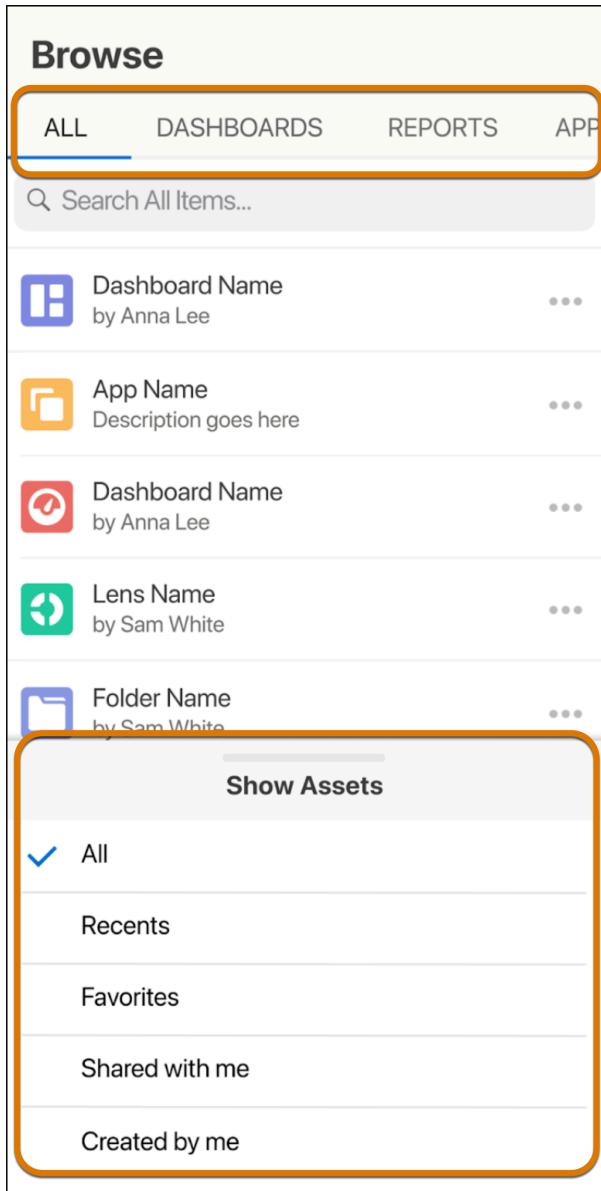
Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

A CRM Analytics license is required to view and access CRM Analytics assets in Unified Analytics.

1. Tap **Browse** on the Home page and you get a series of tabs that organizes your assets by ALL, Dashboards, Reports, and Folders. Assets within tabs for CRM Analytics Dashboards, Lenses, Datasets, and Apps require a CRM Analytics license.
2. Browse defaults to the ALL tab that displays all of your combined assets. Scroll down the tab and tap the asset you want, or select a tab for a specific asset type. Swipe up to filter assets even further, such as assets most recently opened or shared with you.
3. To locate matching analytics assets by name, tap the **Search** icon.





Manage Analytics Assets in Unified Analytics

The asset details page contains helpful information about the asset with actions to help you manage them.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

A CRM Analytics license is required to view and access CRM Analytics assets in Unified Analytics.

Tap the **More** button on an analytics asset to open the details panel.



The details panel shows you information about the assets, such as the asset type and data sources. Use the available actions at the top of the panel to manage the asset.



Curate Your Analytics with Collections

Collections enable you to curate your own set of analytics from any CRM Analytics app or Lightning folder.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

A CRM Analytics license is required to view and access CRM Analytics items.

1. Open a Collection

- a. Tap the Collections tab on the home page then tap **View All** for the collection you want to open.
Tap any item in the collection to open.



2. Add to a Collection

- a. Tap **View All** on a collection.
- b. Tap **Add** then select the CRM Analytics items.
- c. To add an open item, tap on the item then tap **Add**.
- d. Tap a collection or tap **Create New Collection** to add to a new one.

3. Create a Collection

- a. Tap **Collections** on the home page then tap .
- b. Give the collection a name, optional description, and color.
- c. Tap **Save** when finished.
- d. Tap **Add Insights** then select CRM Analytics dashboards and lenses for the collection.



Monitor CRM Analytics Dashboard Metrics in Unified Analytics

Watchlist in Unified Analytics enables you to track KPIs and trends across different dashboards.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

A CRM Analytics license is required to view and access CRM Analytics items.

Watchlists are created and edited on the full desktop site licensed for CRM Analytics. Only metrics from CRM Analytics dashboards you have access to can be added to a watchlist. To learn more about watchlists, see [Monitor Important Metrics with the CRM Analytics Watchlist](#) to learn more.

To open a watchlist, tap **Watchlist** on the home page.

Snapshots of your metrics are captured at regular intervals that show how dashboard metrics are performing at any given moment, so there's never any stale data.

Get Additional Insights from a Dashboard Widget

Launch interactive navigation from a static dashboard widget with single-click interactions on your iOS devices.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

A CRM Analytics license is required to view and access CRM Analytics assets in Unified Analytics.

Widget interactions are user actions assigned to dashboard widgets. For example, tapping a bar in an overview chart opens a dashboard page with the details related to the selection. Widget interactions only appear for widgets that are set up for additional actions. To learn more, see [Configure a Widget Interaction](#).



Open a CRM Analytics dashboard and tap a widget. Tap **Interact**, then tap the option you want to open.



Navigate Unified Analytics on Android

Unified Analytics is a modern and welcoming environment on Android to organize, locate, and share your analytics.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

A CRM Analytics license is required to view and access CRM Analytics items.

To open Unified Analytics, tap **All Items**, and select **Analytics** in the Salesforce Mobile app.



Unified Analytics Home Page

Feature	Description
Browse	Shows all your items organized by type.
Collections	Curated analytics customized to your space.
Recents	Shows your most recently opened analytics by type.
Favorites	Preferred analytics for quick access.
Pinned Collections	Shared collections posted to your home page.

Find Your Assets in Unified Analytics

Locating your analytics assets is quick and easy with efficient organization in Unified Analytics Home.

Curate Your Analytics with Collections

Collections enable you to curate your own set of analytics from any CRM Analytics app or Lightning folder.

Get Additional Insights from a Dashboard Widget

Launch interactive navigation from a static dashboard widget with single-click interactions on your Android devices.

Find Your Assets in Unified Analytics

Locating your analytics assets is quick and easy with efficient organization in Unified Analytics Home.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

A CRM Analytics license is required to view and access CRM Analytics assets in Unified Analytics.

1. Tap **Browse** on the Home page and you get a series of tabs that organizes your assets by ALL, Dashboards, Reports, and Folders. Assets within tabs for Lenses, Datasets, Apps, and CRM Analytics Dashboards require a CRM Analytics license.
2. Browse defaults to the ALL tab that displays all of your combined assets. Scroll down the tab and tap the asset you want, or select a tab for a specific asset type. You can also filter assets even further, such as assets most recently opened or shared with you.
3. To locate matching analytics assets by name, tap the **Search** icon.



Example

The screenshot shows the 'Browse' screen in the Salesforce mobile app. The top navigation bar has tabs for ALL, DASHBOARDS, REPORTS, LENSES, and DATASETS. The 'ALL' tab is highlighted with an orange border. Below the tabs is a search bar with the placeholder 'Search Assets'. The main content area displays a list of assets:

- Copy of UIA_Report_Filters (8m ago) • By Liao Wang
- UIA_Report_Filters (Aug. 23, 2022) • By Liao Wang
- 1AUIA External State Source (Aug. 19, 2022) • By Liao Wang
- 1AUIA External State Dest Lens (Jul. 22, 2022) • By Liao Wang
- Honeywell Recent Deals (15m ago) • By Integration User

At the bottom of the screen is a sidebar with three options: 'All Items' (which is checked with a blue checkmark), 'Recents', and 'Favorites'. The 'All Items' option is also highlighted with an orange border.

Curate Your Analytics with Collections

Collections enable you to curate your own set of analytics from any CRM Analytics app or Lightning folder.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

A CRM Analytics license is required to view and access CRM Analytics items.

1. Open a Collection
 - a. Tap the Collections tab on the home page then tap **View All** for the collection you want to open.
 - b. Tap the item in the collection to open.
2. Add to a Collection
 - a. Open a collection.
 - b. Tap **Add** then select the CRM Analytics item.
3. Create a Collection
 - a. Tap **Collections** on the home page then tap the plus icon.
 - b. Give the collection a name, optional description, and color.
 - c. Tap **Save** when finished.
 - d. Tap **Add Insights** and select the CRM Analytics items for the collection.

Get Additional Insights from a Dashboard Widget

Launch interactive navigation from a static dashboard widget with single-click interactions on your Android devices.

REQUIRED EDITIONS

Setup for the Salesforce mobile app available in: Lightning Experience

Setup available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

A CRM Analytics license is required to view and access CRM Analytics assets in Unified Analytics.

Widget interactions are user actions assigned to dashboard widgets. For example, tapping a bar in an overview chart opens a dashboard page with the details related to the selection. Widget interactions only appear for widgets that are set up for additional actions. To learn more, see [Configure a Widget Interaction](#).



Open a CRM Analytics dashboard and tap a widget. Tap **Interact**, then tap the option you want to open.



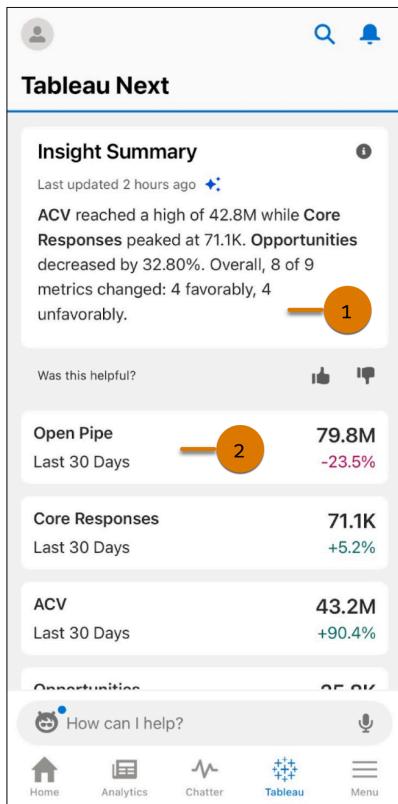
Stay Informed With Tableau Next Mobile Overview

Tableau Next Mobile empowers users to engage with their data insights anytime, anywhere, fostering a culture of data-driven decision-making beyond the confines of the traditional office. Furthermore, Tableau Next Mobile enhances collaboration by allowing users to easily share insights with colleagues,

which promotes a more connected and informed workforce, leading to more effective problem-solving and improved business outcomes.

REQUIRED EDITIONS

[View supported editions.](#)



The insight summary (1) captures key observations, findings, and conclusions from the personalized metrics you follow. Content is clear and actionable, often highlighting trends and potential implications.

Metrics (2) that you're tracking help you to quickly access and monitor progress, understand the current state of KPIs, and identify areas for improvement.

[Set Up Tableau Next Mobile](#)

Grant access to Tableau Next in the Salesforce Mobile App, ensuring that your users can begin using it to monitor their most important metrics right away.

[View Metric Details in Tableau Next Mobile](#)

Metric details give you key context and a deeper understanding of your metric's status, breaking down the data with clear visuals, trends over time, and applied filters.

[Submit Feedback for Continuous Improvement](#)

Submit feedback to share valuable context or flag concerns on cross metric insight summaries. By contributing feedback, you support continuous improvement and collaboration.

[Share a Metric in Tableau Next Mobile](#)

Share metrics to promote alignment across teams, enabling a common understanding of metric

performance and using data to make smarter decisions together.

Enable Metric Notifications

Get notified about important system events or when analytics are shared. These alerts boost engagement and simplify teamwork.

Set Up Tableau Next Mobile

Grant access to Tableau Next in the Salesforce Mobile App, ensuring that your users can begin using it to monitor their most important metrics right away.

REQUIRED EDITIONS

[View supported editions.](#)

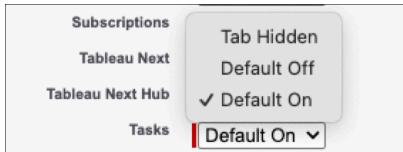
User Permissions Needed	
To enable Tableau Next Mobile:	Tableau Next Admin permission set

Add Tableau Next Tab to the Salesforce Mobile App

If you're new to the app, ensure setup is complete and users have been assigned the appropriate user licenses outlined in [Admin: Set Up Tableau Next](#) before continuing.

Add and Customize Tableau Next Lightning Tab

1. From Setup, in the Quick Find box, enter **Profiles**.
2. Go to Tab Settings.
3. Locate the profile you want to update and click **Edit**.
4. Locate Tableau Next Hub. Use the dropdown menu and select **Default On**.



 **Note** If you don't see Tab Settings, follow the steps outlined in [View and Edit Tab Settings in Permission Sets or Profiles](#).

[Add Tableau Next to a Salesforce Mobile App](#)

Customize your mobile app's navigation bar with Tableau Next.

Add Tableau Next to a Salesforce Mobile App

Customize your mobile app's navigation bar with Tableau Next.

REQUIRED EDITIONS

[View supported editions.](#)

User Permissions Needed

To enable Tableau Next Mobile:

Tableau Next Admin permission set

Add Tableau Next to a Mobile App

1. In the Quick Find box, enter *App Manager*.
 2. Locate the App Name you want to update with the Tableau Next tab. Its App Type must be Lightning.
 3. Click on the action menu and click **Edit**.
 4. From the Lightning App Builder, click **Navigation Items**.
 5. Select **Tableau Next Hub** then click the right arrow to add it to the app.
 6. Use the arrows to position Tableau Next Hub to a top four position.
-  **Note** Don't ignore this step. This ensures that Tableau Next Hub appears in the horizontal menu at the bottom of the app. Another option within a mobile app is to click **Menu** then **Edit** to update tab ordering.
7. Click **Save**.
 8. Verify Tableau Next appears in the Salesforce Mobile App
 - a. Log in to your Salesforce mobile app.
 - b. From the App Launcher, navigate to the specific Salesforce app you configured to include Tableau Next Hub.
 - c. Metrics that users are added to as followers appear on the overview page.

 **Note** Following metrics is done on the full desktop site.

See Also

[About Following Metrics](#)

View Metric Details in Tableau Next Mobile

Metric details give you key context and a deeper understanding of your metric's status, breaking down the data with clear visuals, trends over time, and applied filters.

REQUIRED EDITIONS

[View supported editions.](#)

Tap a metric to open the detail page.

Insight Summary

Last updated 4 hours ago

The Open Opportunities reached an unexpected high of 1.0K. Pipeline Generation peaked at 35.6M. Total Sales surged by 24.54%. Overall, 6 of 7 metrics changed: 3 favorably, 3 unfavorably.

Was this helpful?

Sales Cycle (Won)
Last 30 Days, Financial Services

Sales Cycle (Won)	245.5
Current Year	+26.0%
Conversion Rate	51.34%
Current Year, Analytics Suite,Dat...	-17.1%

Sales Cycle (Won)

Current Year

245.5

+26.0% (+50.7) vs. prior period
(1/1/2024-12/31/2024)

In April 2025, the last month with available data, Sales Cycle (Won) was 97.6.

A favorable trend has been detected for Sales Cycle (Won). The trend reversed 12 months ago and is now trending down.

Metric information helps you understand and trust how it's calculated, offering clarity and context, so you can confidently rely on the insights to make informed decisions.

Metric Information X

Metric Description
This metric doesn't have a description yet.

Metric Value
Sum Sales

Semantic Model
Sales Cloud

Metric Owner
Created by Matt Brewer
(mattbrewertabnext@gmail.com)

Last Updated
Updated by Matt Brewer on Apr 11, 2025 at 2:08 PM
(mattbrewertabnext@gmail.com)

See Also

[About Following Metrics](#)

Submit Feedback for Continuous Improvement

Submit feedback to share valuable context or flag concerns on cross metric insight summaries. By contributing feedback, you support continuous improvement and collaboration.

REQUIRED EDITIONS

[View supported editions.](#)

User Permissions Needed	
To submit feedback:	Tableau Next Analyst permission set

1. On the overview page, tap the feedback icons represented by a thumbs up  and a thumbs down .
2. If thumbs down is chosen, tap one or more of the predefined reasons.
 - Inaccurate
 - Incomplete
 - Biased, toxic, or harmful
 - Wrong tone or style
 - Other
 - a. If Other is selected, type in specific feedback, suggestions, or comments. This can help us understand your concerns more clearly.
3. Tap **Submit**.

Share a Metric in Tableau Next Mobile

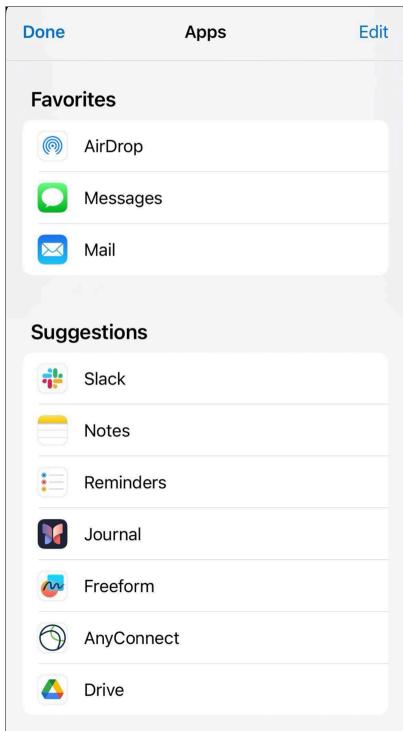
Share metrics to promote alignment across teams, enabling a common understanding of metric performance and using data to make smarter decisions together.

REQUIRED EDITIONS

[View supported editions.](#)

User Permissions Needed	
To share Tableau Next metrics:	Tableau Next Analyst permission set

1. Tap a metric on the overview page.
2. Tap share  on the metric.
3. Tap an app on your mobile device to share the metric.



4. Tap **Copy** to distribute the copied link, or **Save to Files** to save it locally.

Enable Metric Notifications

Get notified about important system events or when analytics are shared. These alerts boost engagement and simplify teamwork.

REQUIRED EDITIONS

[View supported editions.](#)

Tap the bell  to see when you've been added or removed as a follower to a metric.

Click a notification to go directly to the relevant metric.

 **Note** Following or unfollowing metrics is done on the full desktop site.

See Also

[View Notifications About Metrics](#)