



Briefcase Builder



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Briefcase Builder

Your mobile workforce can access information seamlessly while they're offline. You can use Briefcase Builder to create a *briefcase*, a set of rules and filters that select records to prime for offline use. Design a mobile app that connects with a briefcase to give your users access to the most relevant records, even when there's a network outage, spotty internet coverage, or an area without Wi-Fi.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**

[When to Use Briefcase Builder](#)

Learn the ways that Briefcase Builder can complement your Salesforce-connected mobile app.

[Mobile Apps Compatible with Briefcases](#)

Learn the prerequisites for mobile apps that you can connect with a briefcase.

[Briefcase Planning](#)

Before you create briefcases, keep in mind a few considerations to plan which records go into each briefcase.

[Briefcase Creation](#)

Learn how to create and customize a briefcase for your mobile workforce.

[Advanced Ways to Select Records for a Briefcase](#)

Learn advanced ways to create a briefcase that contains the most relevant records for your mobile workers.

[Edit, Activate, Deactivate, Delete, or Clone a Briefcase](#)

Find briefcases that you already registered. View the actions for a previously defined briefcase. And edit, activate, deactivate, delete, or clone a briefcase.

[Validate Briefcase Settings](#)

Check the Run As User option on a briefcase to review how many records it generates so you can validate filtering criteria and briefcase assignments.

[Briefcase Builder and Packaging](#)

Install and manage packages containing briefcases.

[Limits and Considerations](#)

As you create and work with offline briefcases, note these considerations and limits.

When to Use Briefcase Builder

Learn the ways that Briefcase Builder can complement your Salesforce-connected mobile app.

REQUIRED EDITIONS

Available in: Lightning Experience

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A *briefcase* is a set of rules and filters that select records to prime for offline use. Using Briefcase Builder, you can create and manage your organization's briefcases. By connecting a briefcase with a [compatible mobile app](#), you can enable your mobile workforce to access the most relevant records, even while offline.

You can use a briefcase with your mobile app when:

- Your mobile workforce requires a large volume of records to be viewable offline. Briefcase Builder supports up to 50,000 records that can be retrieved offline.
- Your mobile workforce requires information stored in both standard and custom Salesforce objects.
- Your mobile workforce requires information stored across different but related objects. When you create a briefcase, you can create related rules that select records to prime across objects so that your end users can seamlessly access information across objects while offline.

See Also

[Related Object Rules](#)

Mobile Apps Compatible with Briefcases

Learn the prerequisites for mobile apps that you can connect with a briefcase.

You can use a briefcase with these mobile apps.

- The [Field Service mobile app for iOS and Android](#)
- [Salesforce Mobile App Plus](#)
- A custom-built mobile app that's configured with the [Briefcase sync down target](#)

To determine whether a mobile app is configured with the Briefcase sync down target, ask the developer or publisher.

Briefcase Planning

Before you create briefcases, keep in mind a few considerations to plan which records go into each briefcase.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

With Briefcase Builder, you can have up to five active briefcases and up to 50,000 records per user primed for offline access across those briefcases. When you create a briefcase, you assign the users or groups that have access to the briefcase's records, and you select which apps are connected to the briefcase. These decisions can constrain where or for whom you can use a briefcase.

- Consider your use cases for accessing records offline.
- Consider the roles or teams that interact with records offline to support your use cases.
- Among the roles or teams that access records offline, consider the requirements for the records that the roles or teams can or can't view.
- Consider the apps that each role or team uses to view records offline.

 **Example** All your field technicians need offline access to information about the service appointments assigned to them. They also need access to the related asset and case information. Experienced field technicians also get customer questions about services, so they need offline access to your product information. To accommodate these needs, create two briefcases.

- One briefcase for all field technicians. Add the Service Appointment, Asset, and Case objects to the briefcase as related object rules. Assign the briefcase to the group that represents all field technicians.
- One briefcase for the experienced field technicians. Add the PricebookEntry object to the briefcase. Assign the briefcase to the group that represents experienced field technicians.

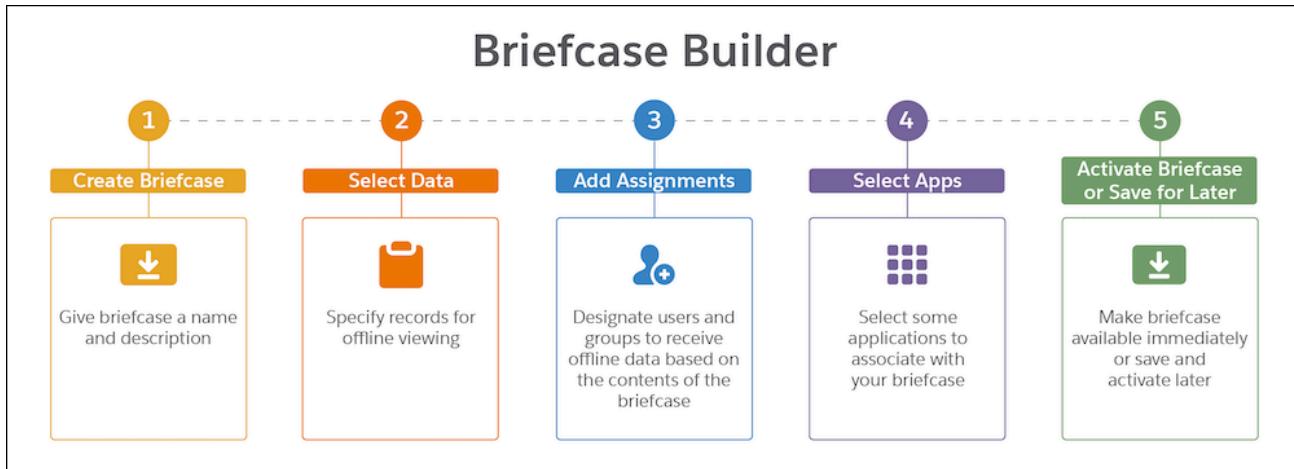
Briefcase Creation

Learn how to create and customize a briefcase for your mobile workforce.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions



Create a Briefcase

Create a briefcase by using Briefcase Builder in Setup.

Data Selection

Learn how you can use object rules and filters to select the most relevant records for your mobile workforce.

App Selection

Learn important considerations about selecting connected apps to associate with your briefcases.

Create a Briefcase

Create a briefcase by using Briefcase Builder in Setup.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS NEEDED

To create a briefcase in Setup:

Customize Application

1. From Setup, in the Quick Find box, enter **Briefcase Builder**, and then select **Briefcase Builder**.
2. Click **New Briefcase**.
3. Enter a name and an optional description for your briefcase.

New Standard Briefcase: Acme Work Order

Set the details: Give the briefcase a name and description.

* Name
Acme Work Order

* Developer Name
Acme_Work_Order

Description

Next

4. Select the data to add to the briefcase. Use object rules to configure which objects are included in your briefcase and how the objects' records are related to each other.

To add a top-level object rule, click the + button next to Briefcase Rules, and then click the object that you want to add. To add a related object rule, select its top-level object rule in the left pane, and then click **Add Related Object**.

In each object rule, use filters to specify which records from the object to include in the briefcase.

For more information on your options for object rules and filters, see [Data Selection](#).

New Standard Briefcase: Acme Work Order

Select data: Add records to the briefcase.

Briefcase Rules	
Objects	Custom Metadata
Records remaining: 49,500 out of 50,000 maximum	
Account 500	
Filter By: Choose... Criteria: Choose... Value: <input type="text"/> Add Filter	
Filter Logic: 1	
Results Settings Select the number and order of results. Filter by Owner: All Records Maximum Records Returned: 49,500 remaining <input type="text" value="500"/> Order By: System Modstamp Sort By: Descending	
Back	Next

- For the Offline App (Salesforce Mobile App Plus), you can optionally enable offline priming for file attachments.

In the settings for an object rule, select **Enable file attachments**, and then enter the maximum number of files to return for each record. You can optionally filter file attachments by file size or file type.

The total number of files returned by an object rule is calculated by the maximum files per record multiplied by the maximum records returned. The total number of files returned by a briefcase is the sum of files returned by all object rules in the briefcase. For example, an Account object rule with 10 maximum records and 2 maximum files per record returns up to 20 files. A Contact object rule with 20 maximum records and 3 maximum files per record returns up to 60 files. A briefcase with the Account and Contact rules returns up to 80 files.

You can configure up to 100 file attachments across all active briefcases.

The screenshot shows the 'Briefcase Rules' configuration screen. On the left, there's a sidebar with 'Briefcase Rules' at the top, followed by tabs for 'Objects' (which is selected) and 'Custom Metadata'. Below these are sections for 'Records remaining: 49,500 out of 50,000 maximum' and a list of objects: 'Account' (with 500 records). On the right, under 'File Attachments', it says 'File attachments are available only for the Offline App (Salesforce Mobile App Plus.)'. It includes settings for enabling file attachments, specifying a maximum number of files per record (set to 0), filtering attached files by maximum file size (bytes), and selecting allowed file types via a search bar.

6. If you have [custom metadata types](#) available, you can optionally add custom metadata rules to your briefcase. For example, add a custom metadata rule to your briefcase to support a custom flow in the Salesforce Field Service mobile app.

To add a custom metadata rule, click the + button next to Briefcase Rules, click **Custom Metadata**, and then select the custom metadata type that you want to add.

This screenshot shows the 'Briefcase Rules' configuration screen again. The 'Custom Metadata' tab is highlighted with an orange box. Below it is a search bar labeled 'Search custom metadata type'.

For more information on custom metadata rules, see [Data Selection](#).

7. Assign the briefcase to users, user groups, or profiles. These assignments determine who can access the records in the briefcase.

Only user groups are supported. Chatter groups, or collaboration groups, aren't supported.

Users who perform various tasks can be assigned to multiple briefcases. When assigning multiple briefcases to one user, they get access to all the offline data combined from all the assigned briefcases. If a user doesn't have access to the field used to define a dataset, then that user can't access any records for that dataset.

8. Select the connected apps that you want to associate with this briefcase. For more information on considerations for the apps that you associate with the briefcase, see [App Selection](#).
9. To save and activate the briefcase, click **Activate**. To save the briefcase's settings without activating it for use, click **Save**.

Data Selection

Learn how you can use object rules and filters to select the most relevant records for your mobile workforce.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**

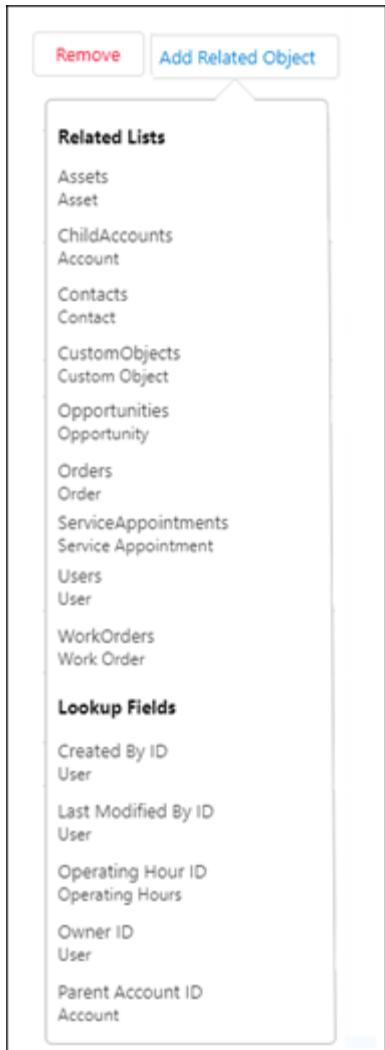
 **Important** Selecting briefcase data also performs access checks to ensure that users see only the records that they have access to. And if a user doesn't have access to the field used to define a dataset, then that user can't access any records for that dataset.

Briefcase Rules: Objects

Use object rules to configure which objects are included in your briefcase and how the objects' records are related to each other.

To add a top-level object rule, click the + button next to Object Rules. To add a related object rule, select its top-level object rule in the left pane, click **Add Related Object**, then select a related object from the picklist of Related Lists or Field Lookups. Only allowed related objects are visible in the related objects picklist.

Each item in the related objects picklist has two lines in its label. For related lists, the first line is the relationship name and the second line is the object name. For field lookups, the first line is the lookup field on the current object and the second line is the object name.



- Note** Depending on the relationship between objects, the same object can appear multiple times in the related object's list.

Filters

In each object rule, use filters to specify which records from the object to include in the briefcase.

If you add multiple filters, use the **Filter Logic** field to specify how you want the filters to be evaluated together. Filters are numbered sequentially: 1, 2, 3, and so on. Filter logic operators include AND and OR. To specify how you want the filters to be evaluated, enter a statement in the **Filter Logic** field using the filter numbers and operators.

For example:

- To find records that match two filters, enter `1 AND 2`.
- To find records that match at least one of two filters, enter `1 OR 2`.
- To find records that match both filter 1 and filter 2, or filter 3, enter `(1 AND 2) OR 3`.

Results Settings

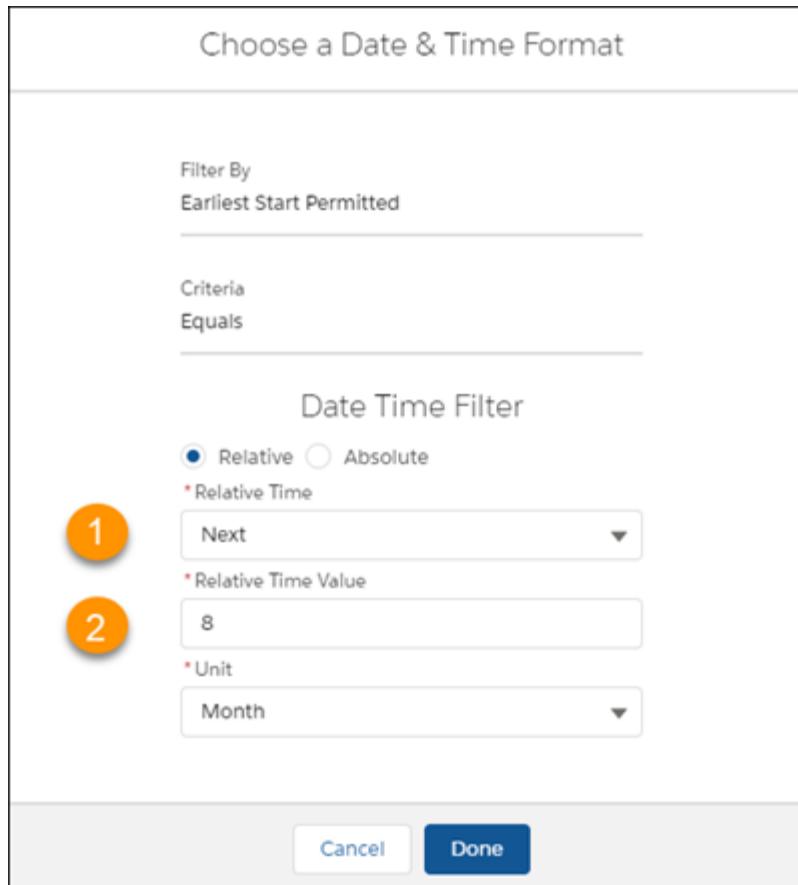
In each object rule, use the results settings to determine how many records are returned by each object rule and how the records are ordered.

- Filter by Owner: Select whether all of the object's records are included, or only records owned by the user creating the briefcase.
- Maximum Records Returned: Enter a number to limit the number of records returned by an object rule. The values that you set can help you stay within the briefcase's record limits.
- Order By: Select which field to order records by.
- Sort By: Select whether to order records by descending or ascending.

 **Note** Order By and Sort By are available only for top-level object rules.

Relative Date Filters

Relative date filters are useful when setting up a briefcase that makes a specific date range of service appointments available to your field service agents. These filters are also useful when assigning your users' events or tasks for the next day.



The screenshot shows the 'Choose a Date & Time Format' dialog box. At the top, it says 'Choose a Date & Time Format'. Below that, there are sections for 'Filter By' (set to 'Earliest Start Permitted') and 'Criteria' (set to 'Equals'). The main area is titled 'Date Time Filter'. It has two radio buttons: 'Relative' (selected) and 'Absolute'. Under 'Relative', there is a dropdown menu labeled 'Relative Time' with 'Next' selected. Below that is a field labeled 'Relative Time Value' containing the number '8'. Underneath that is a dropdown menu labeled 'Unit' with 'Month' selected. At the bottom of the dialog are 'Cancel' and 'Done' buttons.

Relative Time: This, Next, Last (1). Relative Time Value and Unit (2).

You can address these scenarios by selecting a relative date filter that offers a series of date and time choices based on the current date. For example, if you want all service appointments created next month based on the Scheduled Start field and the current month is November, you get all service appointments

for December. And if it's Thursday, users assigned event objects for the next day get all events scheduled for Friday.

You can filter records based on the relative time and date unit. A partial listing of date units includes day, week, month, year, fiscal quarter, and fiscal year. You can use the date units with these relative time elements: This, Next, and Last.

If you want the precise dates for a particular record object but not a period or range, use the absolute date and time filter. Absolute dates use a GMT time value.

Briefcase Rules: Custom Metadata

If you have custom metadata types available, you can optionally add custom metadata rules to your briefcase. For example, add a custom metadata rule to your briefcase to support a Field Service Mobile Flow in the Salesforce Field Service mobile app.

To add a custom metadata rule, click the + button next to Briefcase Rules, click **Custom Metadata**, then select the custom metadata type that you want to add. To remove a custom metadata rule from a briefcase, select the rule in the left pane, then click **Remove**.

You can only add or remove custom metadata rules in a briefcase. You don't configure any filters on a custom metadata rule. All records associated with a custom metadata rule are returned, up to a limit of 500 records.

 **Important** For more information on briefcase rule limits and supported objects, fields, and filters, see [Limits and Considerations](#).

See Also

[Related Object Rules](#)

App Selection

Learn important considerations about selecting connected apps to associate with your briefcases.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**

With the Briefcase Builder wizard, you can select and specify record data from any app enabled for offline syncing with the Briefcase Priming API, such as the Salesforce Field Service app. Being selective in your app choices helps control the resources chosen for offline access and reduces the volume of data records. Depending on the desired workflow, you can assign multiple apps to a briefcase or assign multiple briefcases to an app.

Here are a few strategies to consider when organizing briefcases around apps.

- Determine what kinds of offline record data users need from a particular mobile app. Can you separate different types of users with different needs and then map apps to briefcases and configure briefcases data records appropriately?
- Organize briefcases and app selection groupings around the separation of duties, roles, or division of responsibility of your mobile workforce.

 **Warning** Some apps aren't enabled for offline syncing. Check if the app supports briefcase priming before adding it to the briefcase.

To associate apps to a briefcase, on the final step of the New Briefcase flow, select the location of the app in the Search Applications dropdown, then click in the Select apps search bar field.

To search for an app, start typing the app name into the search bar, and then select it from the dropdown when it appears.

Advanced Ways to Select Records for a Briefcase

Learn advanced ways to create a briefcase that contains the most relevant records for your mobile workers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**

[Related Object Rules](#)

To give your briefcase users access to related records across different objects, set up related object rules.

[Select Records with Related Object Rules](#)

Create a briefcase that selects records using three levels of related object rules.

[Custom Formula Fields](#)

To select records based on information in multiple objects, create a custom formula field.

[Select Records with a Custom Formula Field](#)

Create a briefcase that filters an object rule using a custom formula field.

Related Object Rules

To give your briefcase users access to related records across different objects, set up related object rules.

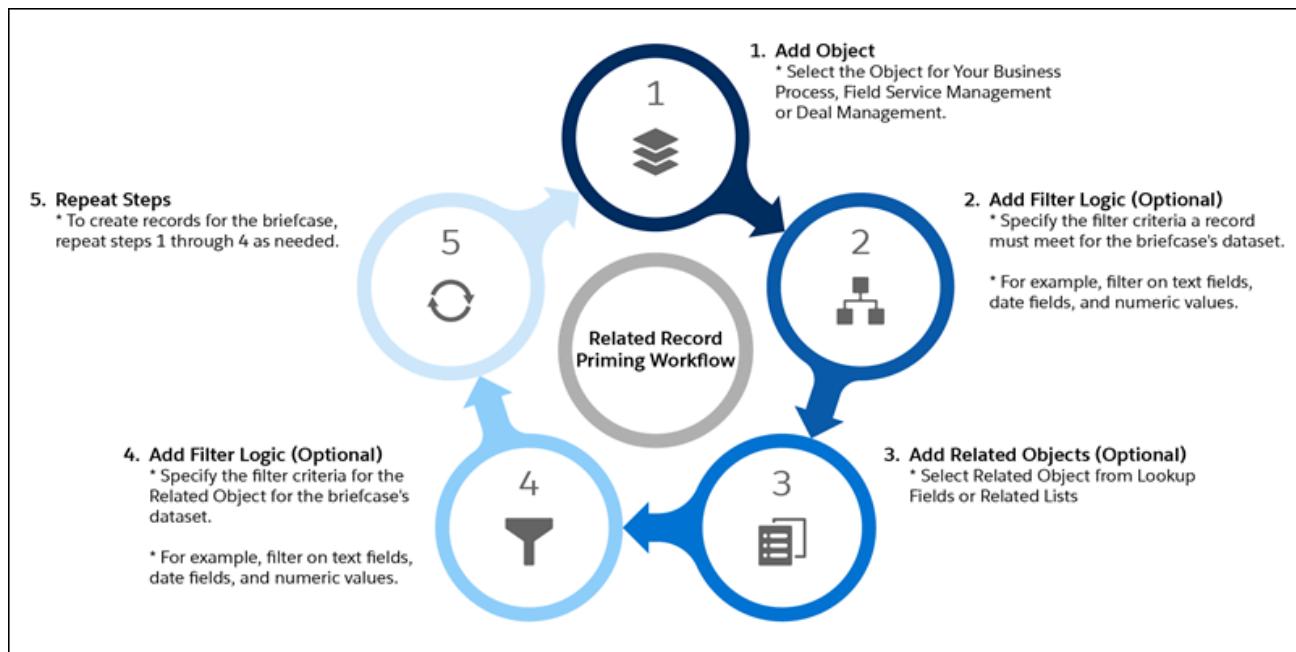
REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

With related object rules, your mobile workers can access information that's stored in different, related objects. For example, your briefcase users want to see all their assigned service appointments and the associated quotes. The service appointment information is stored in the Service Appointment object, and the quote information is stored in the Asset object. You can use related object rules to make the related object records viewable offline.

To set up related object rules, select a top-level object, then add an object that has a common field with the top-level object. You can configure a hierarchy of up to three levels for related object rules.



Note This workflow also applies to custom objects and related custom objects.

See Also

[Select Records with Related Object Rules](#)

[Advanced Ways to Select Records for a Briefcase](#)

Select Records with Related Object Rules

Create a briefcase that selects records using three levels of related object rules.

REQUIRED EDITIONS

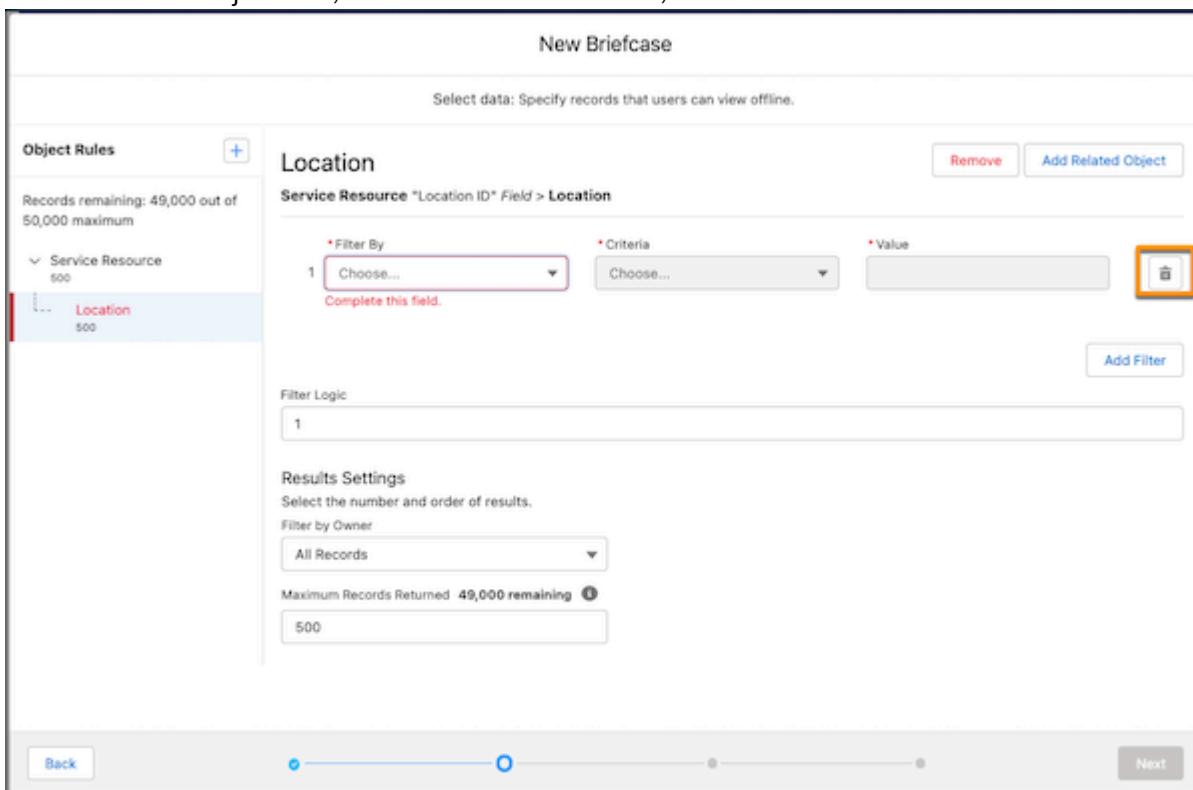
Available in: Lightning Experience

Available in: Enterprise, Performance, Unlimited, and Developer Editions

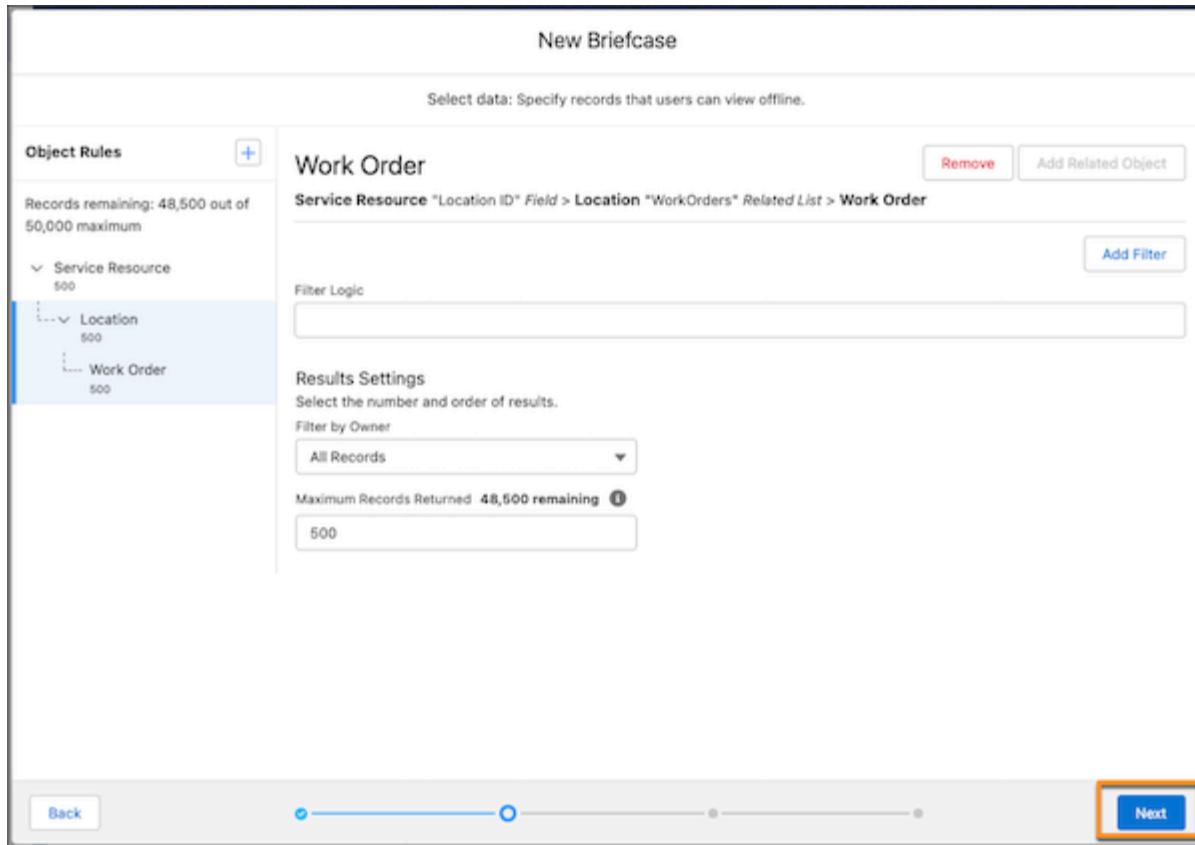
To access the Service Resource object, enable Salesforce Field Service licenses and permissions.

Create a briefcase so that your field technicians can view work order records for their location. The record objects are Service Resource, Location, and Work Order.

1. From Setup, in the Quick Find box, enter *Briefcase Builder*, and then select **Briefcase Builder**.
2. Click **New Briefcase**.
3. Enter a name, developer name, and a description for the briefcase. Click **Next**.
4. From the Object Rules pane, click the plus sign (+), then select **Service Resource**.
5. For Filter By, select **User ID**. For Criteria, select **Equals**. For Value, select **Current User ID**. Click **Next**.
6. With the Service Resource rule still selected in the Object Rules pane, click **Add Related Object**. Then, under Lookup Fields, click **Location ID**.
7. In the Location object rule, to delete the default filter, click the trash icon.



8. Click **Add Related Object**, then under Related Lists, click **Work Order**.
9. In the Work Order object rule, to delete the default filter, click the trash icon.
10. Confirm the hierarchy of related object rules. The Service Resource rule is the top-level rule. The Location rule is nested in the Service Resource rule. The Work Order rule is nested in the Location rule. Click **Next**.



11. Select the users or groups assigned to this briefcase, then click **Next**.
12. Select applications to associate with the briefcase.
13. To save your briefcase settings and use it, click **Activate**.

See Also

[Related Object Rules](#)

[Advanced Ways to Select Records for a Briefcase](#)

Custom Formula Fields

To select records based on information in multiple objects, create a custom formula field.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer Editions**

You can use [custom formula fields](#) for a briefcase to filter records by a value that references fields in more than one object. For example, your briefcase users want records from accounts located in their U.S. state. The account information is stored in the Account object, and the briefcase user's information is stored in the User object.

Your briefcase users need records from the Account object but not the User object. So instead of

creating related object rules, you can create a custom formula field that matches the account and the user's state. After you create a custom formula field, you can use the field in an object rule filter.

-  **Note** Custom formula fields aren't indexed, so filtering by a formula field can affect the speed of briefcases with [large data volumes](#).

See Also

- [Select Records with a Custom Formula Field](#)
[Advanced Ways to Select Records for a Briefcase](#)

Select Records with a Custom Formula Field

Create a briefcase that filters an object rule using a custom formula field.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Create a briefcase so that your mobile workers can view records from accounts located in their U.S. state.

1. From Setup, in the Quick Find box, enter *Object Manager*, and then select **Object Manager**.
2. To view account object details, click **Account**.
3. Click **Fields & Relationships**, then click **New**.
4. For Data Type, select **Formula**. Click **Next**.
5. For Field Label, enter a label to help you identify the field, such as *Is In Current User State*.
6. For Formula Return Type, select **Checkbox**. Click **Next**.
7. Click the **Advanced Formula** tab, then click **Insert Field**.
8. In the Insert Field window, select **Account >**, select **Billing State/Province**, and then click **Insert**.
9. Click **Insert Operator**, then select **= Equal**.
10. Click **Insert Field**, select **\$User**, and then select **State/Province**. Click **Insert**.
11. Confirm that you see the formula *BillingState = \$User.State*.

Step 3. Enter formula

Step 3 of 5

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: TODAY() > CloseDate | More Examples...

Simple Formula Advanced Formula

Insert Field Insert Operator ▾

Is In Current User State (Checkbox) =
BillingState = \$User.State |

Check Syntax

Functions -- All Function Categories -- ▾

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

12. Click **Next**.
13. Select the profiles that can view this field, then click **Next**.
14. If needed, select the page layouts to add this field to, then save your work.
15. From Setup, in the Quick Find box, enter *Briefcase Builder*, and then select **Briefcase Builder**.
16. Click **New Briefcase**.
17. Enter a name, developer name, and a description for the briefcase. Click **Next**.
18. From the Object Rules pane, click the plus sign (+), then select **Account**.
19. For Filter By, select your new custom formula field. For Criteria, select **Equals**. For Value, select **True**. Click **Next**.

New Briefcase

Select data: Specify records that users can view offline.

Object Rules +

Records remaining: 49,500 out of 50,000 maximum

Account 500

Account

* Filter By * Criteria * Value

1 Is In Current User State Equals True

Add Filter

Filter Logic 1

Results Settings

Select the number and order of results.

Filter by Owner

All Records

Maximum Records Returned 49,600 remaining ⓘ

500

Order By

System Modstamp

Sort By

Descending

Back Next

20. Select the users or groups assigned to this briefcase, then click **Next**.

21. Select applications to associate with the briefcase.
22. To save your briefcase settings and use it, click **Activate**.

See Also

[Custom Formula Fields](#)

[Advanced Ways to Select Records for a Briefcase](#)

Edit, Activate, Deactivate, Delete, or Clone a Briefcase

Find briefcases that you already registered. View the actions for a previously defined briefcase. And edit, activate, deactivate, delete, or clone a briefcase.

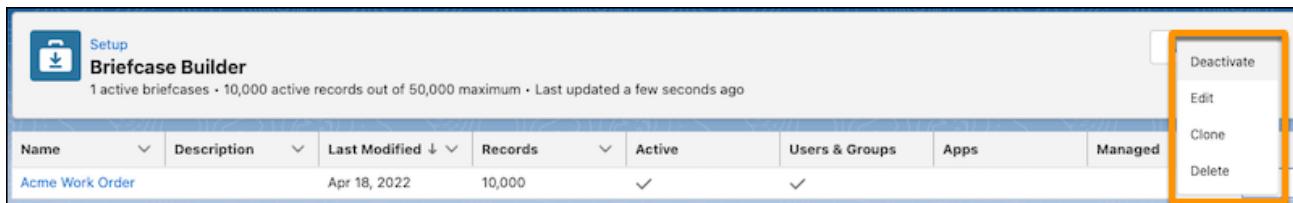
REQUIRED EDITIONS

Available in: Lightning Experience

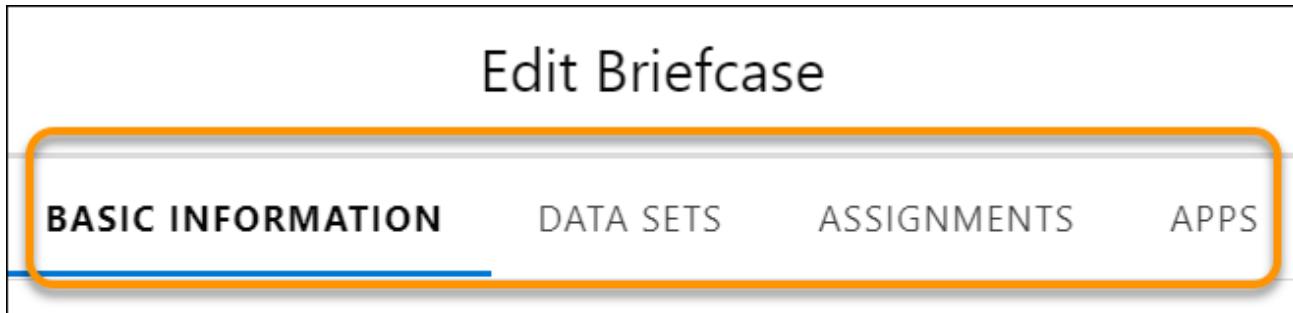
Available in: **Enterprise, Performance, Unlimited, and Developer Editions**

Edit

You can change the name and description of a saved briefcase, update selected data and assignees, and turn activation off or on. In the Briefcase Builder setup, to view the inline menu for a briefcase, click the down arrow. The Briefcase inline menu includes deactivate, edit, clone, and delete options.



To launch the guided edit flow, select **Edit**. To change the briefcase configuration, select a tab. To continue editing when you're done working on a tab, select another tab. Or to exit the edit flow, click **Done**.



To edit the associated configuration for the briefcase, select a tab.

Activate, Deactivate, or Delete

To quickly change the activation status for a briefcase or to delete a briefcase, click the down arrow to view the inline menu for the briefcase, and then select **Activate**, **Deactivate**, or **Delete**.

Clone

To create a briefcase by copying an existing briefcase configuration, click the arrow in the briefcase's Actions column and select **Clone**. On the Clone Briefcase page, enter a unique briefcase name.

 **Note** By default, Briefcase Builder automatically adds a number to the end of the existing briefcase name. Modify the default name so that it's unique and descriptive of the cloned briefcase.

You can optionally change these settings in the cloned briefcase.

- Data fields for the Object: Filter By, Filter Logic, Record Scope, Record Limit Per Object
- Assignments
- Activation

To save and activate the cloned briefcase, click **Activate**. To save the briefcase's settings without activating it for use, click **Save**.

See Also

[Limits and Considerations](#)

Validate Briefcase Settings

Check the Run As User option on a briefcase to review how many records it generates so you can validate filtering criteria and briefcase assignments.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Check whether a user is receiving records from the objects that you set up in their briefcase.

Scenario 1: Before activating a briefcase, use Run As User to validate the filtering criteria that you selected.

Scenario 2: A field technician can't see the records offline that contain the next week's schedule. To troubleshoot the issue, use Run As User to check the number of records in the field technician's briefcase.

1. From Setup, in the Quick Find box, enter *Briefcase Builder*, and then select **Briefcase Builder**.
2. Click the briefcase.
3. Click **Run As User**.
4. In the search box, enter the user's name and then click it.
5. Check whether the user is assigned or not assigned to the briefcase.
6. Review the table that lists information about the filtering criteria and records returned by each object rule.
7. Review the Total Unique Records row, which shows how many unique records are available offline to the user. Other rows in the table show how many records are returned by each object rule, but records can be associated with multiple rules.

Review the value of each column in the Run As User table to identify any briefcase settings that require troubleshooting.

- **Records Available to User** column: The number of records that match the filtering criteria that the selected user has access to
- **Status** column: Indicates whether there's an issue with the briefcase rule

The Status column displays a green checkmark icon when everything is fine and a yellow alert symbol when there's an issue. The Status column also shows error messages. For example, the column displays an error message when a user isn't receiving records because they don't have access to a field used as a filter in the briefcase rule.

Briefcase Builder and Packaging

Install and manage packages containing briefcases.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Consuming Briefcase Builder Packages

For briefcases that you install, upgrade, or uninstall from a package, keep these considerations in mind.

Feature	Supported Behavior
Activate and Deactivate Briefcase	Admin can activate or deactivate a briefcase installed from a managed package.
Related Record Priming (RRP)	Briefcase Builder packaging now supports RRP.

Feature	Supported Behavior
Briefcase Rules	Briefcase rules can't be modified in a briefcase installed from a managed package.
Selected Apps (also called Connected Apps)	Selected apps aren't retained when a briefcase is packaged and distributed across orgs.
Assignment Users and Groups	User or group assignments aren't retained when a briefcase is packaged and distributed across orgs.

- The only way to delete a briefcase installed from a managed package is to uninstall the entire package.
- You can have no more than 5 active briefcases for a total of 10 briefcases, or the package fails to install.
- Automatic renaming: Briefcase Builder doesn't support resolving naming conflicts during an unmanaged install.
- Filters: If you use specific Custom Object IDs for filtering, you can't successfully create a package.

Limits and Considerations

As you create and work with offline briefcases, note these considerations and limits.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

General Limits

Type	Maximum Limit	Comment
Total active briefcases per org	5	
Total top-level object rules per briefcase	10	
Total object rules per briefcase, including top-level rules and related rules	20	
Total levels of hierarchy for related object rules	6	
Total custom metadata type rules per briefcase	10	
Total records per object	50,000	Object rules default to 500

Type	Maximum Limit	Comment
		records per object.
Total records that can be retrieved offline across active briefcases in an org	50,000 per user	
Total filters per object	10	
Users per briefcase	Salesforce doesn't limit the number of users per briefcase, but the number of records plus the number of assigned users does affect briefcase performance.	

Performance

- To optimize briefcase performance and obtain faster query results for records:
 - Include fewer objects and fewer records in a briefcase.
 - Reduce the number of records and add more filters on an object.
 - Avoid using unindexed fields in filters.
- When selecting objects for a briefcase, Salesforce recommends that you apply at least 1 filter to each object for optimal performance.
- To optimize performance, only indexed fields are listed in the Order By dropdown list for record sort order.
- A custom or standard field in the Order By field can affect briefcase performance. To optimize briefcase performance, select `Sysmodstamp`.

Objects

- Unsupported
 - ContentDocument
 - ContentVersion
 - KnowledgeArticle
 - KnowledgeArticleVersion
 - External objects
 - Setup objects
- Supported
 - Standard and custom objects that are customizable and layoutable

Filters

- When you apply filters to an object, you must enter a value for each field. You can't save filters with

missing values.

- An orange warning icon on a filter indicates an unindexed field. Unindexed fields can affect briefcase performance. For more information, click the warning icon.



A screenshot of a filter configuration interface. It shows a row with three columns: 'Filter By' (containing 'Annual Revenue'), 'Criteria' (containing 'Greater Than'), and 'Value' (containing '100000'). To the left of the 'Filter By' column is an orange square icon containing a yellow triangle and the number '1', indicating a warning or unindexed field.

- A red error icon on a filter indicates an invalid value. To apply the filter, you must resolve invalid values. For more information, click the error icon.

Fields

- These filter fields aren't supported: HTMLMULTILINETEXT, HTMLSTRINGPLUSCLOB, MULTILINETEXT, and STRINGPLUSCLOB.
- Compound fields aren't supported, but individual fields within the compound fields are.
- Briefcase Builder supports filtering and sorting by encrypted fields, but these field actions depend on the type of encryption used. The two types of encryption schemes are probabilistic and deterministic. Briefcase Builder doesn't allow sorting by encrypted fields. But Briefcase Builder allows filtering by deterministically encrypted fields with the operator EQUALS.
- When filtering by formula fields, we recommend pairing your filter with at least one non-formula field for better performance. Depending on the number of records and the complexity of the formula, filtering exclusively by formula fields can result in long query times or errors.

Record Scope

For Record Scope, the default value is All Records. The value Assigned to Me is available only for the Service Appointment object.

Briefcase Assignment

For briefcase assignments, Briefcase Builder supports Standard, Partner, and Custom Portal Manager User types.

Person Account

The offline briefcase feature supports person accounts. Their fields are available as filters on the Account object.