

Salesforce Mobile App is enterprise-class app that provides instant access to CRM data of your company from a phone/tablet

It is included in every Salesforce license for no add'l charge. Plug and play- download from app store and log in. App is cross-platform on android and iOS. It is capable of running offline.

Seamlessly work with desktop versions of Lightning Experience.

It's the Salesforce Platform, not just an app. You can customize it just as you would from a desktop.

All your org metadata (or most of it) is automatically carried over to mobile. However, you'll want to customize mobile pages due to the environment limitations. Consider long page loads, endless scrolling, and other scenarios as the enemy of mobile.

Features to use to customize the Mobile App:

- Quick actions
- Compact Layouts
- Mobile navigation, (lightning apps and Mobile Only app)

\*For info on where the mobile app differs or excludes function from the Lightning Exp:

[https://help.salesforce.com/articleView?id=limits\\_mobile\\_sf1\\_parent.htm&type=5](https://help.salesforce.com/articleView?id=limits_mobile_sf1_parent.htm&type=5)

### **Quick Actions:**

Think of them as *shortcuts*. Fast way to launch specific workflow in mobile app. You can also create custom actions. Each action has a unique *page layout*, so you can limit the fields to just mobile necessary. You can *prepopulate fields* to save mobile users time.

Two types of QAs:

- Global- let users create records with no relationship with others. They can be put anywhere actions are supported. USE CASE: user inputs that should occur quickly, but not necessarily completely. (ex: adding a prosp buyer at an open house w/out needing to nav to a new page or creating a relationship to the open house data)
- Object-Specific- let users create/update records in context of a particular object. These show up on record detail pages within the mobile app. Opportunity object action is only available when viewing an opportunity, for example. USE CASE:

When you create a Global Action, you must add it to the Global Publisher Layout so that it is accessible on pages not related to specific objects.

What makes Obj-spec actions different from global: obj-spec can update records. Obj-spec actions can create records with associations to other information. You don't need to add these actions to the global publisher layout, just make them available to users with obj page layout edits.

## Compact Layouts

CL is the layout of fields that appear in the header of a page for a record. You can assign up to 10 fields. There are already defaults for this, but customizing can allow for your users to see the most important info immediately. The 10 fields cannot be text areas or multi-select picklists.

Only one compact layout can be assigned for all users. (unlike page layouts)

## Mobile Navigation Menu

Two main variations to mobile navigation depending on which part of an app they are in.

1. Lightning App
2. Special Mobile Only App

### Navigation bar and Navigation Menu

Navigation Bar is across the bottom of the screen in the mobile app. It makes important nav items in easy reach of users. It contains the Nav menu. The Nav menu is where users access all objects, apps, and items available to them.

If you customize the Nav Bar or Menu, SF recommends you keep the Chatter, Today, Dashboards, Tasks items at the top (mirrors the bar unless users switch to Lightning app)

\*If you enable any Lightning apps for Mobile, then users can switch to them via the App Launcher within the Mobile app.

You can change the items in the Mobile Only Nav Menu (but prob shouldn't). You can change the items in the Nav Menu of a Lightning App. These mirror the tabs in the desktop version, so if it is changed in one place, it will change in the other.

### More Notes on Navigation

- Before you set up navigation items for the Mobile Only app, make sure you read about Smart Search Items. The short explanation is that Smart Search Items adds a dynamic list of recently accessed objects to the navigation menu. Anything you put below Smart Search Items appears after that list of 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.
- If you want to include Visualforce pages, Lightning Pages, or Lightning components in the mobile navigation menu, you have to create tabs for them.
- Before adding a page to the Salesforce mobile app, make sure the page is enabled for mobile. Thoroughly test your Visualforce pages in the Salesforce mobile app because they don't always work the same as they do on desktop.

