

## Before you begin

The Mobile Administration Console is used to set up and manage mobile configurations so that salesforce.com users can easily and productively access their salesforce.com data from their mobile device, whether or not a wireless connection is available.

Before using the Mobile Administration Console, administrators should manage each user account to make mobile applications available to them.

## Manage users

1. Go to <YourName> -> Setup -> Administration Setup -> Manage Users -> Users, and select the 'Edit' link next to each user record.

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Force.com Home	View: Admin Users : Edit   C	Create New View						
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System Overview	O Action Euli Name A	41144	line card		Bata	A athus	Beatile	
Personal Setup	Edit Andrews, Jason	iandr	iandrews@pricelenz.com	1/29/2012 8:22 AM	Installation & Repair Services	()	System Administrator	
My Personal Information	Edit Trent, Mike	mtront	mtrent@pricelenz.com	6/26/2012 6:17 AM		1	System Administrator	
Email	Edit Smith, John	PriceLen	ismith@pricelenz.com	6/26/2012 6:34 AM	Director, Direct Sales	1	System Administrator	
Desktop Integration			New User Res	et Password(s) Add Multiple U	aora			
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pp Setup Customize Create Develop Develop Schema Bullioer Installed Packages AppExchange Mankeplace Critical Updates ministration Setup Manage Users								

2. When editing the user record, ensure that 'Mobile User' is checked. Save the user record.

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Force.com Home	User Edit		Save	Save & New	Cancel					
System Overview	General Information								1	= Required Information
	First Name	John				Role	Director, Direct Sales			
Personal Setup	Last Name	Smith				User License	Salesforce			
My Personal Information	Alias	PriceLen				Profile	System Administrator			
Personal Information	Email	jsmith@pricelenz.com				Active	1			
Change My Password	Username	ismith@pricelenz.com				Marketing User	0			
My Groups	Community Nickname	PriceLen	n l			Offline User				
Change My Display	Title					Knowledge User				
Grant Login Access	Company					Force.com Flow User				
Reminders	Department					Service Cloud User	0			
Email	Division					Site.com Contributor User	0			
Import						Site com Publisher User				
Desktop Integration						Mobile User	-			
My Chatter Settings						Mobile Configuration		91		
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Create						Send Apex Warning Emails				
Develop						Make Setup My Default Landing Page				
Deploy						Force.com Quick Access Menu	1			
Schema Builder						Development Mode				

## **Mobile Administration Console**

3. Go to <YourName> -> Setup -> Administration Setup -> Mobile Administration -> Salesforce Mobile -> Configurations. A splash page like the one below may appear. Click the 'Continue' button.

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Home Chatter Files +		
Expand All   Collapse All	Introducing the Mobile Administration Console	Help for this Page 🥹
Force.com Home	The Mobile Administration Console is used to set up and manage mobile configurations so that salesforce com users can easily and productively access their	All Customara
System Overview	statetore con data hom her mobile device, where or not a wireless consistion is available. Statetore Mobile allow users to guicely look uji a contact and — with not eith-pares a phone can or served an early in one give call or early into subtraction. Out were can make appointments, create and assign tasks, follow up on testes, work on cases and much more, all conveniently from their mobile device.	Administrators should read the <u>Mobile Implementation</u> <u>Guide</u> before using the Mobile Administration Console. Existing mobile customers can find information in the
Personal Setup	For more information about Selestorce Mobile see Mobile Teltorm	guide about migrating from earlier versions of the mobile console.
Email     Import     Desktop Integration     My Chatter Settings		
App Setup  Customize Create Descreate		
Develop     Deploy	Set up Salesforce Mobile with the Mobile Administration Console in 5 steps:	
Schema Builder Installed Packages AppExchange Marketplace Critical Updates	<ol> <li>Create a mobile configuration and choice users and/or profiles the will be interact to the ondiguration (Note: increase are neglined to activate lister).</li> <li>Create and set are that will not users and the set of the set</li></ol>	tor Salestorce Mobile). Inical order to create record filter dependencies. will actually be assigned to the configuration, particularly users social through pages on the mobile device. I download: http://mobile.salesforce.com/setup
Administration Setup Manage Users Company Profile	See a short demo on setting up Salesforce Mobile.  Don't show me this page again Continue	
Company Frontie		

4. To create a new mobile configuration, click the 'New Mobile Configuration' button.

salesforce	aarch Accounts Search		John Smith 🔻	Help Force.com v
Home Chatter Files +				
Expand All   Collapse All	All Configurations			Help for this Page 🥝
Force.com Home	Mobile configurations determine the data sa View: All Configurations  Create New View:	elesforce.com transmits to users' mobile devices, and which users receive that data on their mobile devices.		
System Overview		A   B   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T   U   V   W   X   Y   Z   Other		
Personal Setun		New Mobile Configuration		
Mu Dessenal Information	Action Name *	Description		Active
Email	Edit Del A configuration	testing a mobile config		√
Import     Desktop Integration     Mu Chatter Settinge				

5. Give the new configuration a name, check 'Active', and fill out a description. Depending on your preferences, you can check 'Mobilize Recent Items' and 'Mobilize Followed Records'. From the list, select the members(s) for which you want to make this mobile configuration available to, and add them as members. Select a data size limit that suits your organization. Click the 'Save' button.

Expand wit Collapse wit	New Mobile Configuration
Force.com Home	Mobile Configuration Edit Save Cancel
System Overview	Basic Information   = Required Information
Porsonal Setup My Personal Information Email Import Desktop Integration My Chatter Settings	Name     Price,rez       Active     ✓       Dascreption     PriceLetz, for iPhone users.       Mobilize Revent Items     ✓       Mobilize Revent Items     ✓
App Setup  Customize  Concerning  Develop  Develop  Schema Builder  Installed Packages  AppExchange Markelplace  Critical Updates	Assign Users and Profiles Select the salesfore com users and/or profiles that will use this mobile configuration. A user profile may have only one mobile configuration. Configurations assigned to individual users will override any configurations assigned to user profiles. Search: Users: the Assigned Members Warr, Johneres User, Johneres
Administration Setup Manage Users Company Profile Security Controls Communication Templates Translation Workbench Monitoring Monitoring	Set Data Size Limit To avoid overloading mobile devices, specify the maximum data size allowed for all data sets combined in this mobile configuration. Salesforce com will not synchronize any data sets if the combined data size exceeds this
<ul> <li>Salesforce Mobile</li> <li>Configurations</li> </ul>	Don't sync if data size exceeds: 5 ; MB
Users and Devices Settings Chatter Mobile Mobile Dashboards	Hore do I reduce the size of my data set?           Bane         Cancel

6. Now click the name of your configuration to view it.

salesforce	ann Account. Remain	John Smith 👻 Help	Force.com v			
Home Chatter Files +						
Expand Al   Collapse Al	All Configurations		Help for this Page 🥹			
Force.com Home	Mobile configurations determine the data safesforce.com transmits to users' mobile devices, and which users noceive that data on their mobile devices. View: All Configurations : Chette New View					
System Overview	A B C D E F C H I J K L M N O P Q R S T U V W X Y Z Other All					
Personal Setup	New Mobile Configuration					
	Action Name * Description		Active			
My Personal Information     Email	Edit   Del PriceLenz for iPhone users.		✓			
Import     Desktop Integration     My Chatter Settings						
to by onation oothings						

7. Click the 'Edit' button from the 'Data Sets' section.

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Home Chatter Files 🔶							
Expand Al   Collapse Al	Mobile Configuration PriceLenz « Back to List: Mobile Configurations						Help for this Page
orce.com Home	Below is the information for this mobile	configuration. Click Edit to make o	changes.				
System Overview							
Personal Setup	Mobile Configuration Detail	Edit	Delete Clone				
My Personal Information	Name	PriceLenz		Data Size Limit	5 MB		
Email	Description	PriceLenz for iPhone users.		Mobilize Recent Items	1		
Import	Active	1		Maximum Number of Recent Items	25		
Desktop Integration	Mobilize Followed Records						
My Chatter Settings	Created By	John Smith, 6/26/2012 5:44 AM		Modified By	John Smith, 6/26/2012 7:12 AM		
pp Setup	Assigned Users and Profiles					Assigned User	s and Profiles Help
Customize	Name			т	ype		
Create	John Smith			U	ser		
Develop	J Andrews			U	ser		
Schema Builder Installed Packages	Data Sets	Edit	$\leftarrow$				Data Sets Help
AppExchange Marketplace	Object Ownership	Filtor	Field Filter	Max Records		Order By	
	Mobile Object Properties					Mobilo Obj	oct Properties Help

8. Using the 'Add' button, add 'Opportunity' and 'Product'. Then, select the 'Opportunity' data set that you've just added, and then add the 'Opportunity Product' data set to it. Finally, select the 'Product' data set and set up a filter to show only products that are active. The data set configuration should look like the screenshot below. Click the 'Done' button.

salesforce	earch Accounts		John Bmith + Hulp Forbs.com +
Home Chatter Files +			
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Force.com Home		Done	
System Overview	Define Data Sets	le vill annun av mabile devices annoticed with this configuration. Salach	an a
Personal Setup	type deletes any corresponding mobile vie	is win appear on mobile devices associated with one configuration. Salesio was and excluded fields for that object.	nce com automatically saves changes you make to this page. Note that removing the last data set of an object
	Add. Benove Data Set Opportunity Copportunity Product Product	Protect       Piller Tilly Kacord Ownership Lobe 201 Lindball       Image: All Records       Image: All Records	OVA LP OVA OVA OVA

9. For each data set you have created, you can customize which fields are shown to end-users. From the 'Mobile Object Properties' section, click the 'Edit' link next to the 'Opportunity' object.

salesforce	Search Accounts Search			John Smith	• Help Force.com •
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System Overview		contraction court control trainingent.			
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Email	Active	1	Maximum Number of Recent Items	25	
Import     Depicture Internetion	Mobilize Followed Records				
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App Setup	Assigned Users and Profiles				Assigned Users and Profiles Help 🥑
Customize	Name		T	ype	
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Deploy					
Schema Builder Installed Packages	Data Sets	Edit			Data Sots Help
AppExchange Marketplace	Object	Ownership Filter	Field Filter	Max Records	Order By
Critical Updates	Opportunity	All Records		No Limit	
	Opportunity Product	All Records		No Limit	
Administration Setup	Product	All Records	Active equals True	No Limit	
Manage Users					
Company Profile	Mobile Object Properties				Mobile Object Properties Help ?
Security Controls					
<ul> <li>Communica Templates</li> </ul>	Action Object	Brocked Mobile Permit	5510115	Excluded Fields	
Translation Workbench	East Opportunity				
Data management     Monitoring	Edit Opportunity Product				
Mobile Administration	Edit Product				

10. To minimize data transfer we recommend you exclude the following fields as shown in the screenshot below. Created By, Created Date, Current Generator(s), Last Activity, Last Modified By, Last Modified Date, Lead Source, System Modstamp. Click the 'Save' button.

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Force.com Home	Save Cancel								
System Overview	Opportunity: Blocked Mobile Permissions Prevent users from creating, editing, or deleting records in the mobile application. These mobile settings override the users' standard and custom object permissions.								
Personal Setup  My Personal Information  Email	Biod Create								
Import  Desktop Integration  My Chatter Settings	Opportunity: Excluded Fields Select Opportunity fields that should be excluded from this mobile configuration								
App Setup Customize Create Develop Schema Builder Installed Packages AnnFachanna Markethiaca	Available Fields         Exclude Fields           Discretion         Frequent Streamer           Frequent Streamer         Created By Created Case           Orient Company         Created Case           Nate Company         Created Case           Nate Company         Created Case           Orient Anyliner         Last Boding By           Tracking Number         Last Source non           Tracking Number         Tracking Number								

11. Repeat steps 9 and 10 for the 'Opportunity Product' and 'Product' object properties. We recommend you **exclude the following fields for both of these objects.** Created By, Created Date, Last Modified By, Last Modified Date, System Modstamp.

Schema Builder Installed Packages	Data Sets	Edit			Data Sots Help			
AppExchange Marketplace	Object	Ownership Filter	Field Filter	Max Records	Order By			
Critical Updates	Opportunity	All Records		No Limit				
	Copportunity Product	All Records		No Limit				
Administration Setup	Product	All Records		10-10-10-10-10-10-10-10-10-10-10-10-10-1				
Manage Users								
Company Profile	Mobile Object Properties				Mobile Cu, reporties			
Security Controls     Communication Templates	Action Object Blocked Permi	ions Excluded Fields						
Translation Workbench	Edit Opportunity	Created By, Created Date, Current Generator(s), Last Activity, Last Modified By, Last Modified Date, Lead Source, System Modstamp, Tracking Number						
Data Management	Edit Opportunity Product	Created By, Created Date, Last Mod	dified By, Last Modified Date, System Modstamp					
Monitoring	Edit Product	Created By, Created Date, Last Mod	dified By, Last Modified Date, System Modstamp					
Mobile Administration								
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Users and Devices			Same and the second second					
Settings	Mobile Views	Select an object: All Object	ts		Mobile Views Help 🤊			
Mobile Dashboards	Mobile View Obje	ct Eliter Criteria	Display Columns		Chat •			

12. From the 'Mobile Tabs' section, click the 'Customize Tabs' button.

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Home Chatter Files +							
Expand Al   Collapse Al	Mobile Configuration PriceLenz & Back to List: Mobile Configurations						Help for this Page 🥹
Force.com Home	Below is the information for this mobile	configuration. Click Edit to make c	hanges.				
System Overview							
Personal Setup	Mobile Configuration Detail	Edit	Delete Clone				
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Email	Description	PriceLenz for iPhone users.		Mobilize Recent Items	1		
Import	Active	1		Maximum Number of Recent Items	25		
Desktop Integration	Mobilize Followed Records						
My Chatter Settings	Created By	John Smith, 6/26/2012 5:44 AM		Modified By	John Smith, 6/26/2012 7:33 AM		
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Customize	Name			1	Type		
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Develop     Develop	JAndrews			L	Jser		
Schema Builder	Data Sets	Edit					Data Sets Help
Installed Packages	1						
Critical Updates	Object	Ownership	Filter	Field Filter	Max Records	On	ler By
	opportunity	All Records	-		No Limit		
Administration Setup	Opportunity Product	All Records	5	Anti-a namela Trus	No Limit		
Manage Users	Product	All Record	5	Active equals True	NO LIMIC		
Company Profile     Security Controls	Mobile Object Properties					Mobile Ob	ject Properties Help 🕐
Communication Templates	Action Object Blocked	Mobile Permissions Excluded Field					
Translation Workbench	Edit Opportunity	Created By, Cr	eated Date, Curren	t Generator(s), Last Activity, Last Modified By, Last Modified	ed Date, Lead Source, System Mods	tamp, Tracking	Number
Data Management	Edit Opportunity Product	Created By, Cr	eated Date, Last M	odified By, Last Modified Date, System Modstamp			
Monitoring	Edit Product	Created By, Cr	eated Date, Last M	od ad By, Last Modified Date, System Modstamp			
Salesforce Mobile	Marking Table	(8.1)					
Configurations	Mobile tabs Mobile tabs have not been customized. S	Custon Salesforce Mobile uses the default tab	behavior for this co	onny ration.			Mobile Tabs Help 🕐
Users and Devices Settings	Mobile Views	Select a	in object: All Obje	cts 0 New Mobile View			Mobile Views Help ?
Chatter Mobile							

13. From the 'Available Tabs' select 'Opportunity' and add it. Click the 'Save' button.

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ome Chatter Files +	
Expand All   Collapse All	Ref Moha Cantiguation Help for the Page
rce.com Home	Save Cancel
stem Overview	Select the tabs you want to display in the mobile application. If you do not select any tabs, the default tab behavior is used. By default, tabs for objects included in mobile configuration will be available to the user in the mobile application if they are exposed to the user in at least one salesforce.com application on the website.
rsonal Setup	Available Tabs Selected Tabs
My Personal Information Email Impot Desktop Integration My Chatter Settings 	INASONANSA Product Reports Add Namova
Iministration Setup Manage Users Company Profile Security Controls Security Controls Communication Templates Translation Workbanch Data Management Monitoring Monitoring Monitor Administration Desktop Administration	

The mobile configuration of PriceLenz for Salesforce is now complete. The configuration should look like the screenshot below.

Home Chatter Files +							
Expand Al   Collapse Al	Mobile Configuration PriceLenz « Back to List: Mobile Configurations					Help for this Page	
orce.com Home	Below is the information for this mobile	configuration. Click	Edit to make changes.				
System Overview							
Personal Setup	Mobile Configuration Detail		Edit Delete Clone				
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My Personal Information	Description	PriceLenz for iPhon	te users.	Mobilize Recent Items	1		
Import	Active	1		Maximum Number of Recent Items	25		
Desktop Integration	Mobilize Followed Records						
My Chatter Settings	Created By	John Smith, 6/26/20	012 5:44 AM	Modified By	John Smith, 6/26/2012 7:36 AM		
opp Setup	Assigned Users and Profiles					Assigned Users and Profiles Help	
Customize	Name			т	уре		
Create	John Smith			User			
Develop	J.Andrews User						
Schema Builder	Data Sets		Edit			Data Sets Help	
AppExchange Marketplace	Object		Ownership Filter	Field Filter	Max Records	Order By	
Critical Updates	Opportunity		All Records		No Limit		
Administration Setup	- Opportunity Product		All Records		No Limit		
	Product		All Records	Active equals True	No Limit		
Company Profile	Mobile Object Properties					Mobile Object Properties Help	
Security Controls	Action Object Blocked	Mobile Permissions	Excluded Fields				
Translation Workbench	Edit Opportunity Created By, Created Date, Current Generator(s), Last Activity, Last Modified By, Last Modified Date, Lead Source, System Modstamp, Tracking Number						
Data Management	Edit Opportunity Product		Created By, Created Date, Last Modifie	ad By, Last Modified Date, System Modstamp			
Monitoring	Edit Product Created By, Created Date, Last Modified By, Last Modified Date, System Modstamp						
Salesforce Mobile	Mobile Tabs		Edit Reset to Default			Mobile Tabs Help	
Configurations	Mobile Tab			Type			
Users and Devices Settings	Opportunity			Object Tab			
Chatter Mobile     Mobile Dashboards	Mobile Views		Select an object: All Objects	Rew Mobile View		🗩 Chat	

If you have any questions or need further assistance, please contact:

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