

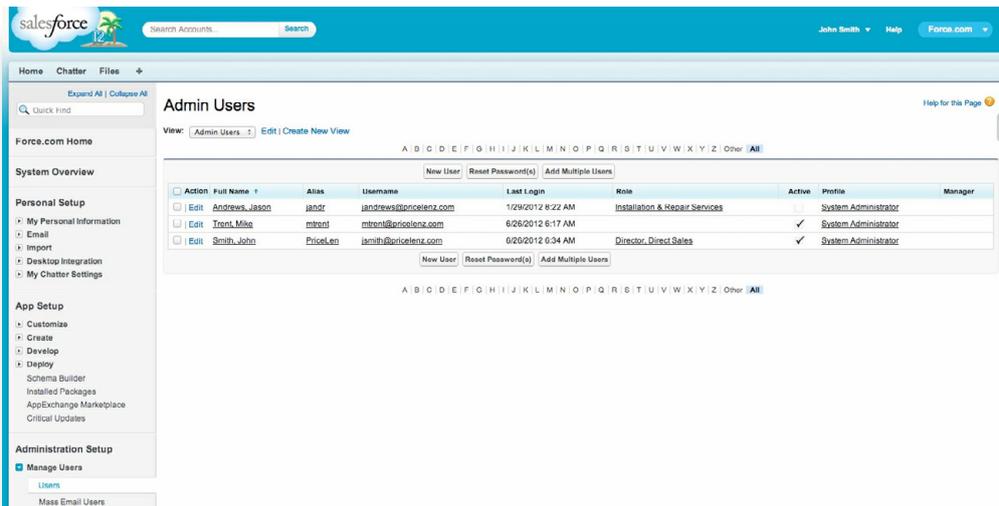
Before you begin

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.

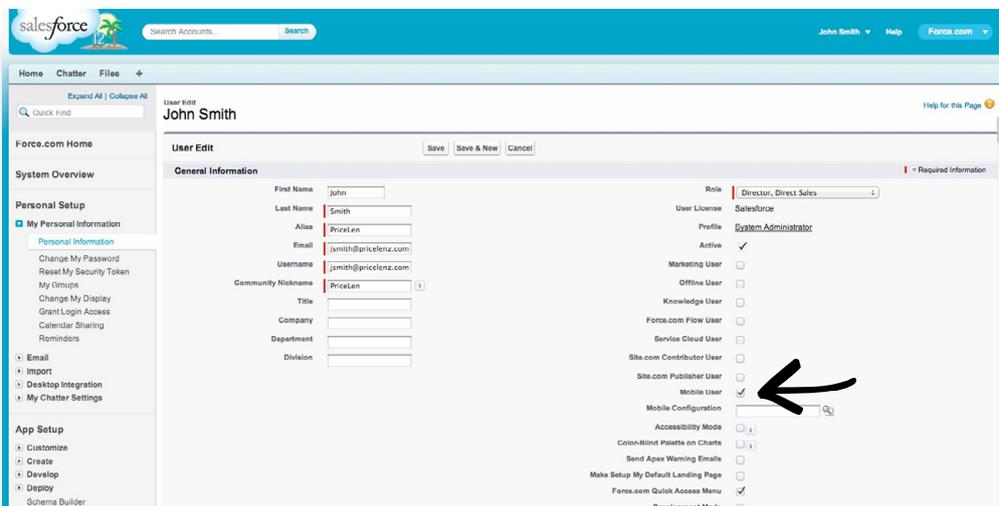
Before using the Mobile Administration Console, administrators should manage each user account to make mobile applications available to them.

Manage users

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

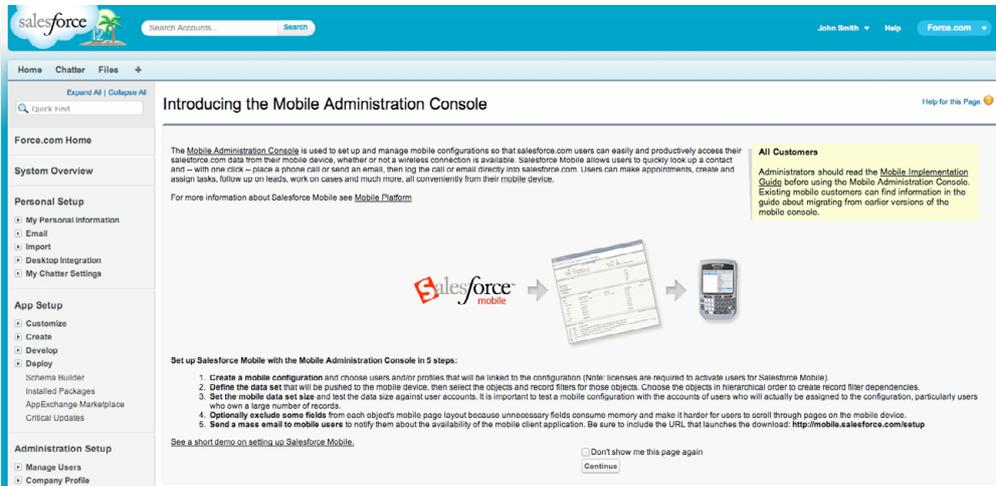


2. When editing the user record, ensure that 'Mobile User' is checked. Save the user record.



Mobile Administration Console

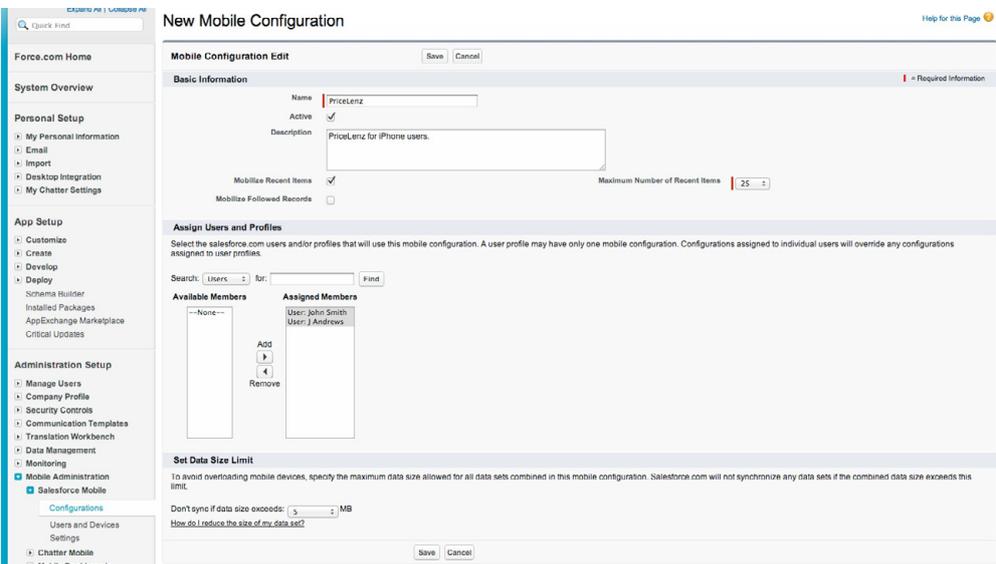
- Go to <YourName> -> Setup -> Administration Setup -> Mobile Administration -> Salesforce Mobile -> Configurations. A splash page like the one below may appear. Click the 'Continue' button.



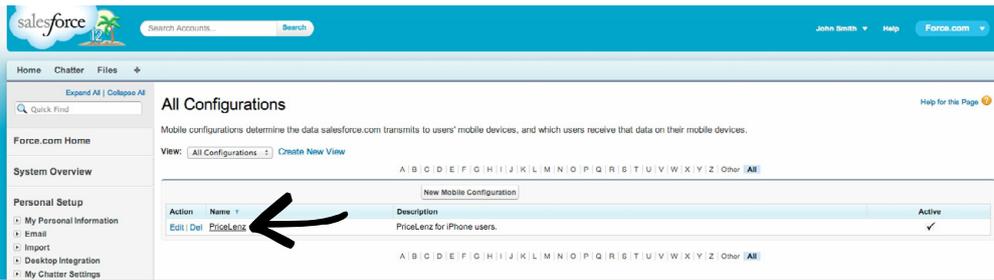
- To create a new mobile configuration, click the 'New Mobile Configuration' button.



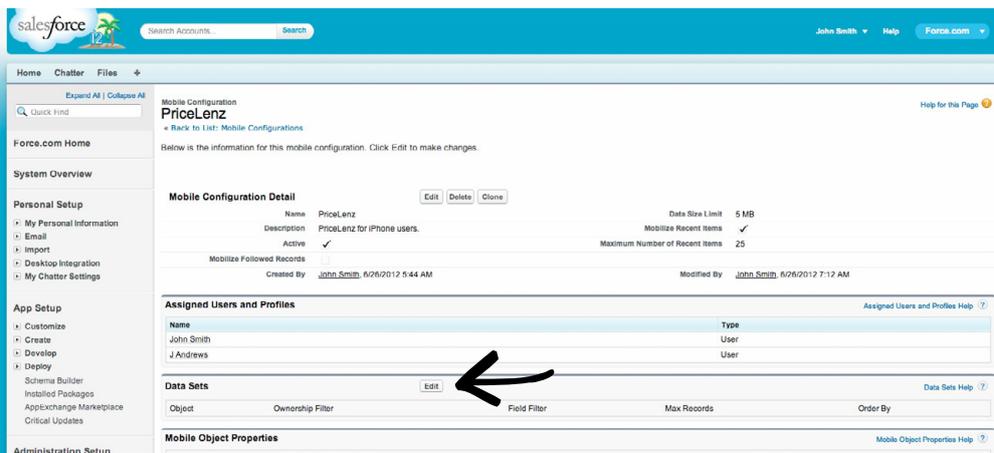
- Give the new configuration a name, check 'Active', and fill out a description. Depending on your preferences, you can check 'Mobilize Recent Items' and 'Mobilize Followed Records'. From the list, select the members(s) for which you want to make this mobile configuration available to, and add them as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



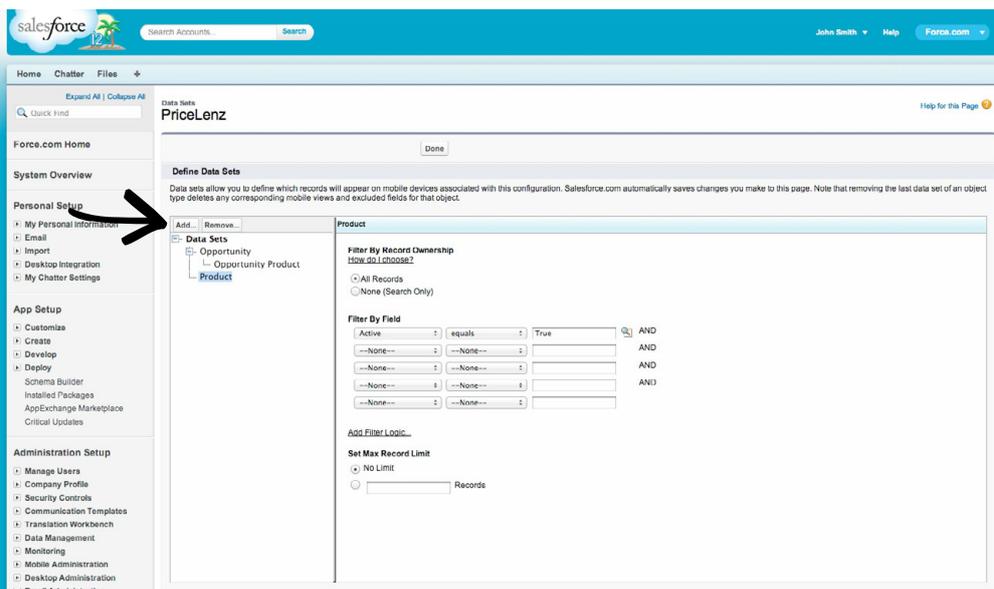
6. Now click the name of your configuration to view it.



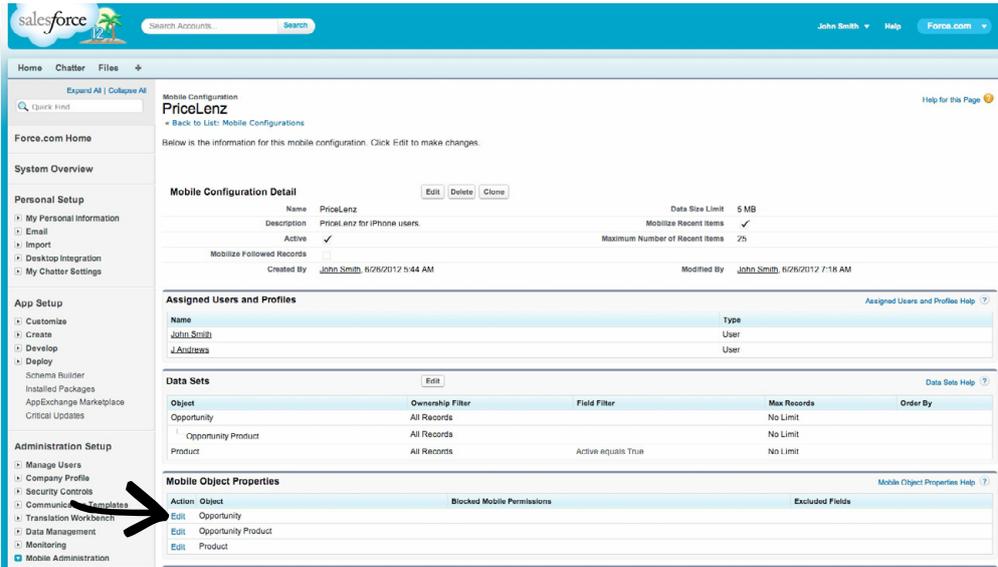
7. Click the 'Edit' button from the 'Data Sets' section.



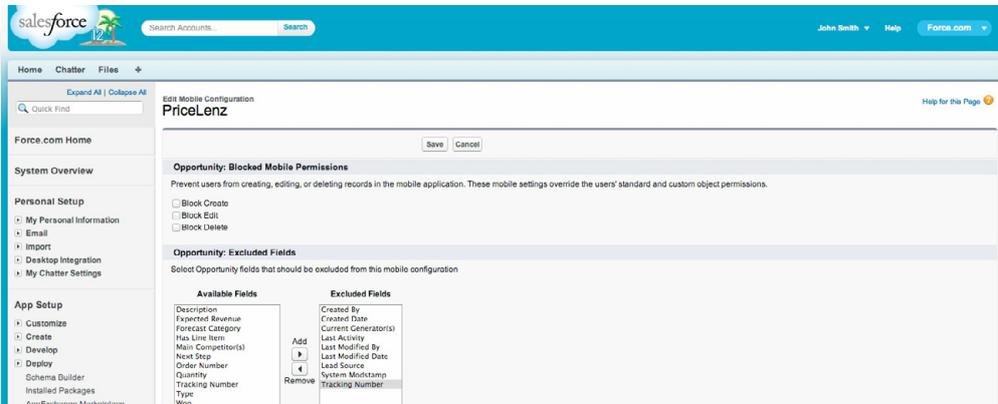
8. Using the 'Add' button, add 'Opportunity' and 'Product'. Then, select the 'Opportunity' data set that you've just added, and then add the 'Opportunity Product' data set to it. Finally, select the 'Product' data set and set up a filter to show only products that are active. The data set configuration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



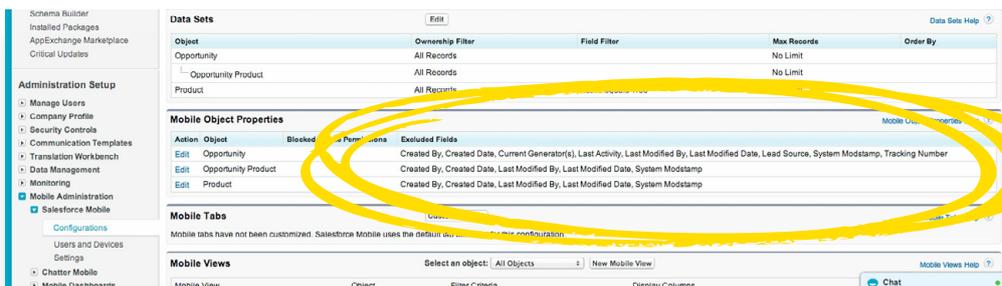
- For each data set you have created, you can customize which fields are shown to end-users. From the 'Mobile Object Properties' section, click the 'Edit' link next to the 'Opportunity' object.



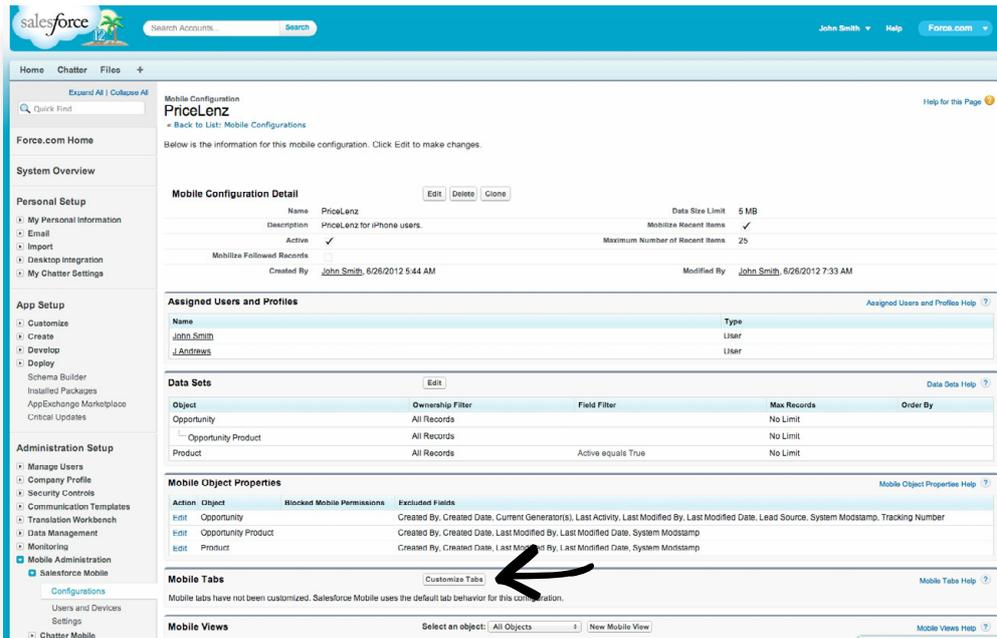
- To minimize data transfer we recommend you exclude the following fields as shown in the screenshot below. Created By, Created Date, Current Generator(s), Last Activity, Last Modified By, Last Modified Date, Lead Source, System Modstamp. Click the 'Save' button.



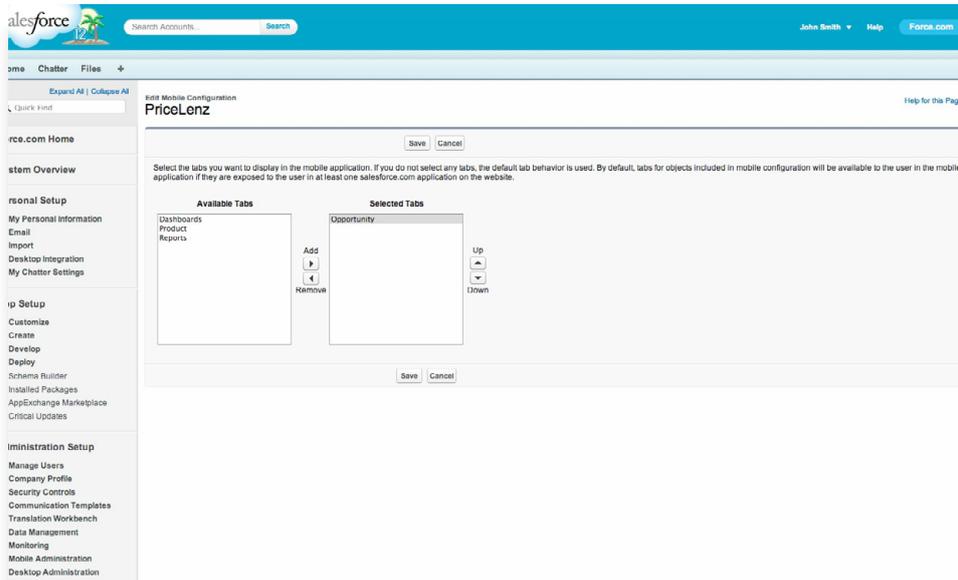
- Repeat steps 9 and 10 for the 'Opportunity Product' and 'Product' object properties. We recommend you exclude the following fields for both of these objects. Created By, Created Date, Last Modified By, Last Modified Date, System Modstamp.



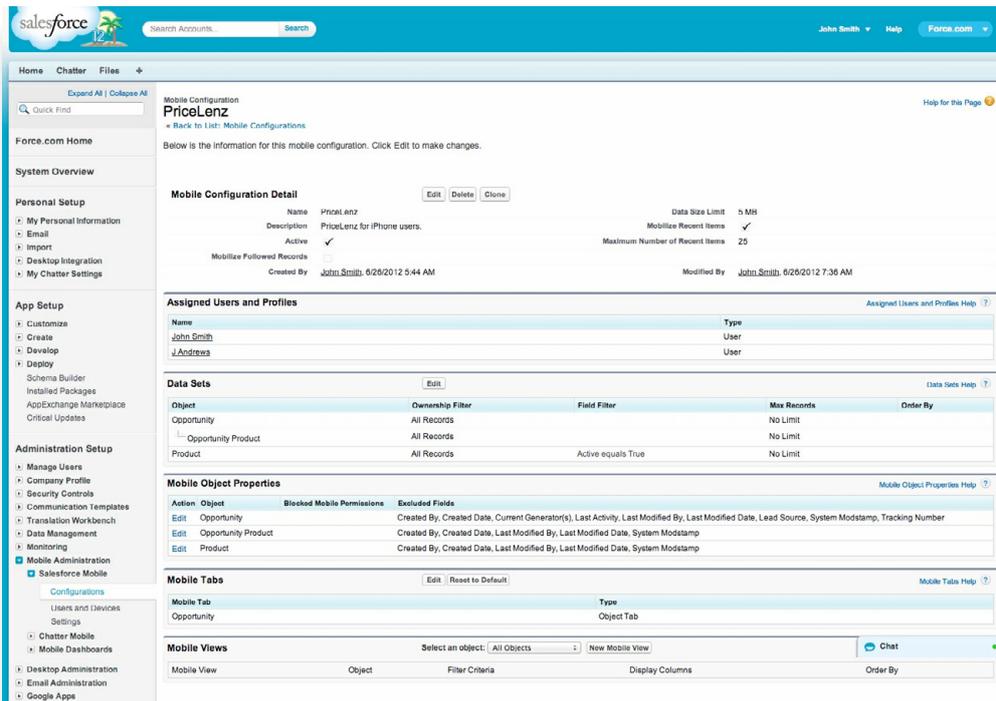
12. From the 'Mobile Tabs' section, click the 'Customize Tabs' button.



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



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



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

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