

Best Practices Summary

Concerned profiles

"ALL"

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This slide summarizes the Best Practices detailed in this Training Material :

1

In the Global Search, Pin 5 Tabs (at least **Account**, **Contacts**, **Opportunities** and **Visit Reports**) to access it easily and ensure it is **Cached**. Before starting with your Mobile Device.

2

When you start working with your device for the first time, you should go click **Cache Now** in the Settings to ensure you have your Recent Data available offline.

3

Before visiting a Customer, you should use **Salesforce** to prepare your visit and then, ensure that the **your Cache will contain all what you need**.

4

When you know that you will be Offline, you should go click **Cache Now** to have your Recent Data available offline.
(before a plane flight for example,...)

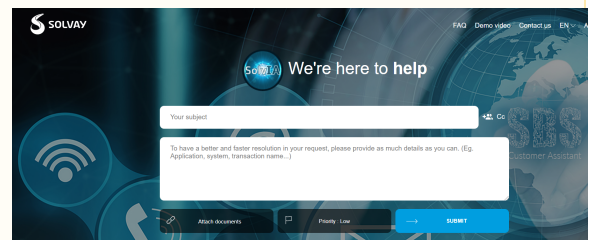
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Need Help?

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you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example