

Offline Capabilities

Concerned profiles

"ALL"

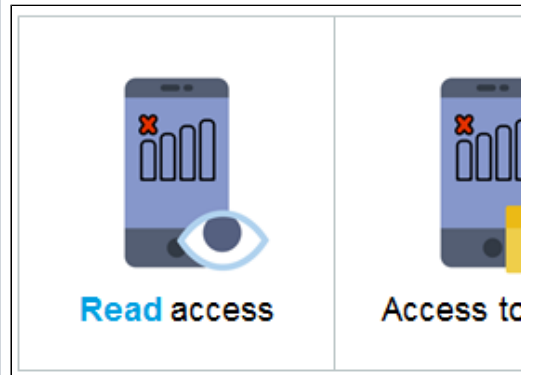
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Generalities

Salesforce 1 provides Offline Capability when using the Native App for iOS & Android including :

These capabilities are detailed in the next slides.



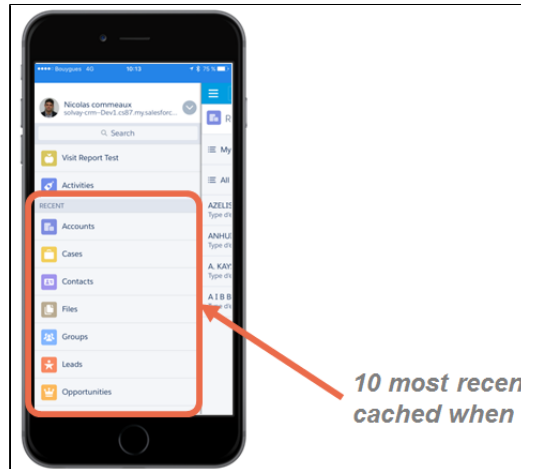
Read access

The left Panel proposes 5 "Recent items" tabs + Recent Events + Recent Tasks + Dashboard. These 5 tabs recent items can be cached for offline usage



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

Do not hesitate to do it also when you know you will be offline (before a plane flight,...)



Salesforce 1 caches automatically the user's most recently accessed records on the mobile. If the user wants to cache also recently opened records on other devices, he can force the App to cache it by pushing the Cache Now button in the Left panel > Settings > Offline Cache > Cache Now menu.



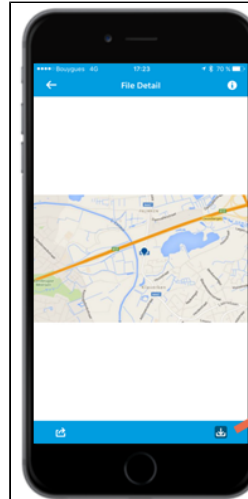
Best Practice : When you start working with your device for the first time, you should go click **Cache Now** to have your Recent Data available offline.

Do not hesitate to do it also when you know you will be offline (before a plane flight,...)



Access to files

Salesforce 1 also allows to mark files that the user wants to keep available when he is offline. You just have to go with your mobile on a file and click the "download" icon on the bottom right corner:

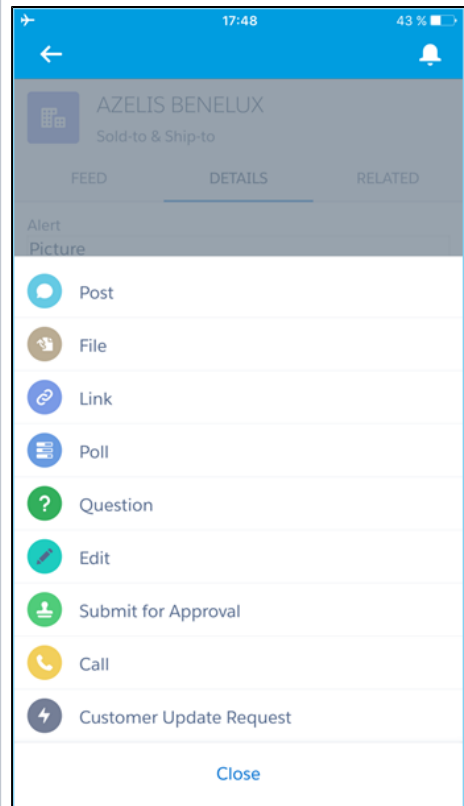


Update a Record Offline (Demo)

User visits an Account and wants to update the phone number of the account. As he went to this Account on his mobile before the meeting, h

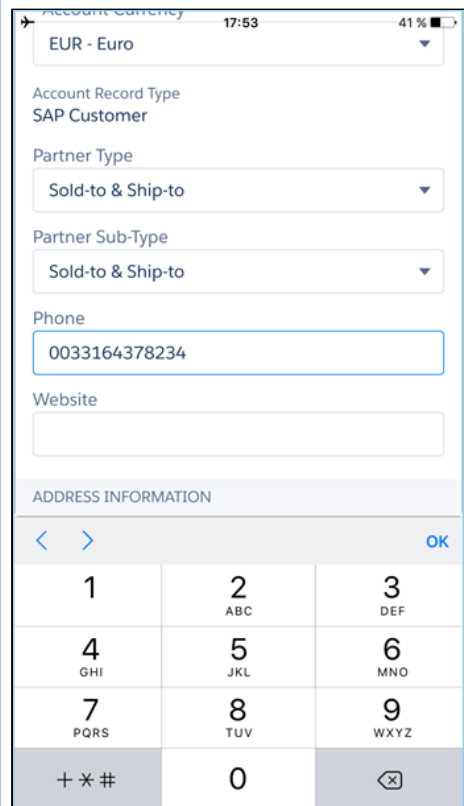
Once on the Account he will :

- click on "Show more" action
- select the "Edit" action



Once on the Account Edit Form he will :

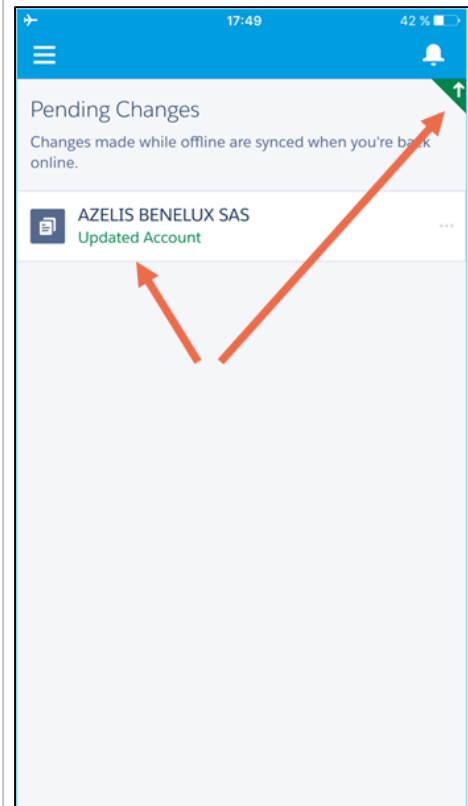
- update the Phone number
- click Save



Once the Account is saved he can go to the "Recent Accounts" list and see that the Account is pending update thanks to the green arrow icon.

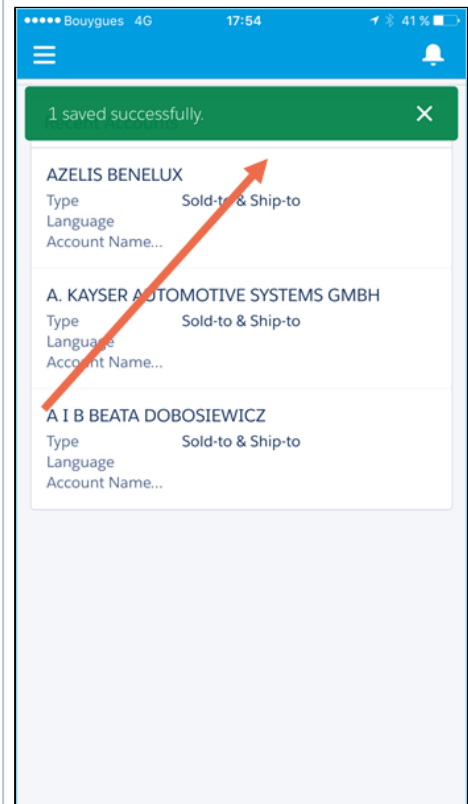
He will have the same information if he opens the left panel...

...and also when going to the Pending Changes Panel.



When the user is back online, the Pending Changes will apply automatically.

A notification is displayed and all the green arrows indicating Records pending changes are removed.

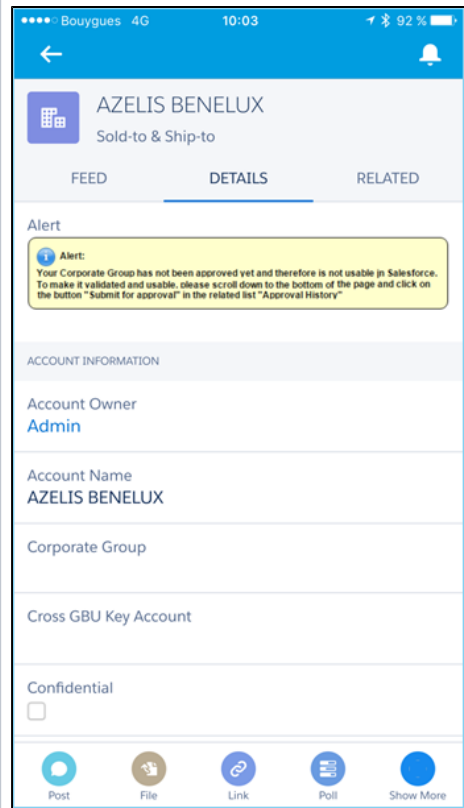


What happens if the user updates a Data that he shouldn't be able to ?

If the user applies changes that shouldn't be done (such as modifying the Account Name), he won't be blocked when offline.

When he goes back Online, he will get an Error Message and the Green arrow turns to Orange

If he goes to the Record, a message explains the error, he can fix the issue and save again.

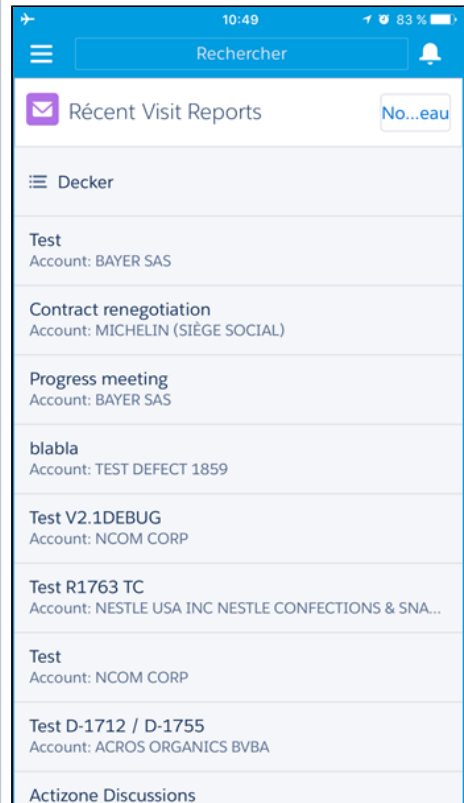


Create a Visit Report (Demo)

How may I create my Visit Report even if I didn't visit the Account or Contact and it is not cached ?

Sometimes, you won't have the Account Cached or you won't have the Visit Reports of the Account Cached and you won't be able to create your Visit Report from the Account.

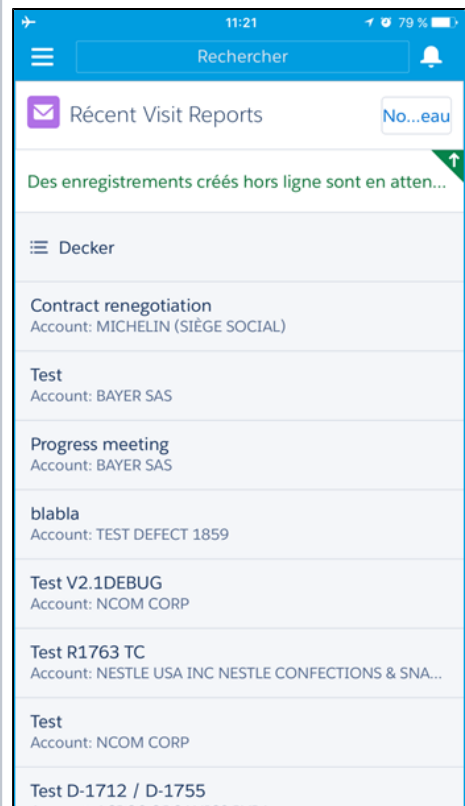
If so, the best solution is to go back to the Visit Reports Tab and click New.



On the form you can then fill every information and because you are offline, you won't be able to link the Report to the correct Account & Contact.

Nevermind, You can type their Name as you remember and validate, it will save your Visit Report Offline !

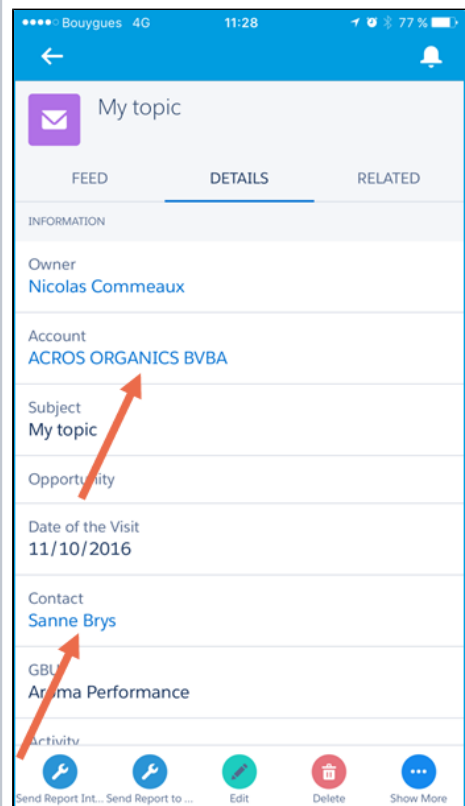
The green arrow indicates that the creation you did Offline is pending synchronization.



When going back Online, synchronization start automatically and you can get an error. Click on it to review the issue : In this case, the Account was not found and you can then search it and finalize the Visit Report and click Save.

Once done, the Visit Report is saved with the Account completed.

Notice that the Contact was automatically set from the Name because it was exactly written the correct way and there was only one contact with this full name.



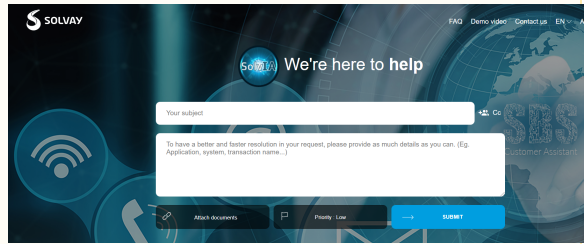
[Related articles](#)

[Need help?](#)



Need Help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



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