

# 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,...)**

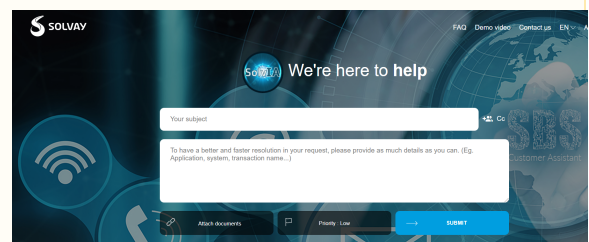
## Related articles

## 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*