

FD - P11. Mobility

- 1. Functional Process & Use Cases
 - Process Overview
 - Use Cases
- 2. Salesforce1 standard features
 - Landscape mode
 - Search / Chatter Collaboration / Navigation
 - Offline
- 3. Supported & Not supported features per process
 - Analytics / Report / Dashboard
 - Access Qlikview from Salesforce1
 - Reports & Dashboards
 - Account/Contact
 - Opportunity
 - Quote
 - Contract
 - Task / Event
 - Visit Report / Account Plan
 - Market Segmentation
 - Complaint
 - Sample Request
 - Customer Request
 - Voice Of the Customer (VOC)
 - Transactional Pricing
- 4. Unsupported & Unplanned for Salesforce1

1. Functional Process & Use Cases

Process Overview

Salesforce provides an out-of-the-box mobile application called Salesforce1.

It is available for both Android (Google phones) and iOS (iPad, iPhone).

Some features may be different depending on the specific device used and depends on the running OS (Android or iOS).

The navigation is different from Salesforce on a desktop, it is optimized from mobile devices (screen size).

Depending on the device used and the size of its screen, it may be difficult to enter a lot of text or to explore wide pages or dashboards.

This application has not been designed to accomplish exactly the same tasks in the same way as in the desktop version.

Use Cases

- A Sales Rep can choose which notifications he wants to receive on his mobile device (Chatter Post, Approval Requests) while on the road
- A Sales Rep can approve or reject requests directly from his mobile device while on the road
- A Sales Rep wants to get a refresh on a customer last data while on the road before a visit
- A Sales Rep wants to save a draft Visit Report right after a customer visit to not forget key elements discussed during the meeting
- A Manager wants to have a look at some dashboards while on the road
- Embedded mobile device features can be used, such as:
 - use the camera to get a picture of a product or of a whiteboard and attach it to a Visit Report
 - use speech recognition to dictate Visit Report notes
 - use map application integration to get driving directions to a customer office

2. Salesforce1 standard features

Landscape mode

Currently landscape mode is only available on iOS (Apple) devices.

Search / Chatter Collaboration / Navigation

Search for records (Global Search)
Search in Feeds (Chatter posts)

Collaborate with Chatter on record and groups (post, file, link, poll)
Post pictures in record feed and Groups
Follow records and join groups

One tab per object in hamburger menu
 List views and Last Viewed Records synchronized with Desktop version
 Record view splitted in 3 tabs (Feed, Details, Related)

Offline

Cache Now function to make a copy on your device of your last viewed records to have access to it once offline
 Cache main records (Accounts, Contacts, Opportunities...) to be able to create related records on them (Visit Reports, Opportunities, Quotes...)

The 10 last items for the 5 first tabs (+ Events, Tasks & Dashboards) on the Global Search page are cached when clicking « Cache Now »

OR

Select up to 7 objects for which you want to cache last viewed records in Settings /Offline Preferences

3. Supported & Not supported features per process

Analytics / Report / Dashboard

Access Qlikview from Salesforce¹

Known limitations:

- screen size (depends on device : phone/tablet)
- no zoom
- no landscape mode
- no multiple filters selection

Reports & Dashboards

Known limitations:

- only recently accessed Reports & Dashboards are displayed but you can search for
- no Chatter feed
- no dashboard filter
- no conditional highlighting
- no export
- no print
- matrix and summary reports are shown in tabular format. Joined reports aren't available.

More info:

https://help.salesforce.com/articleView?id=limits_mobile_sf1_analytics.htm
<https://help.salesforce.com/articleView?id=000211798&type=1>

Account/Contact

Object	Feature	Details
Account	Creation	ok
Account	Edition	ok
Account	Change Owner	ok
Account	Corporate Group Account Hierarchy	Page not working completely (click to view, droplist not working) and not optimized for mobile
Account	Standard account hierarchy view	not supported
Account	Create a Prospect, and convert it to account	No conversion button (feature currently pending redesign)
Account	Manage your account team	add team member, add default team
Account	360° Customer View	Visit Report Preparation button OK
Account	Request a corporate group creation	ok
Account	Related accounts	Displays incorrectly, only displays first record if many (need functional redesign, not a priority)
Account	Customer Update Request	ok
Account	Sold & Pending Orders	not optimized for mobile display

	Related objects (lists)	
Account	GBU Customer Segmentation from Account	No new button
Account	Approval History	No Submit for Approval button (not a need)
Account	Account Plan association	Creation ok, view ok
Account	Account Team	Add Default Team ok, Add Team Member ok
Account	Account Updates & Conversions	View ok
Account	Activities	Creation ok from action bar, view ok
Account	Quote	No new button
Account	Cases (Ship-to)	No new case button but quick action to create New Sample Request and Customer Request
Account	Cases (Sold-to)	No new case button but quick action to create New Sample Request and Customer Request
Account	Customer Request	Handled with Quick action
Account	Sample Request	Creation ok, view ok
Account	Competitive Insight	No new button (not a need)
Account	Contacts	Creation ok, view ok
Account	Involved Contacts	No new button (will be replaced by Contacts to Multiple Accounts)
Account	Cross BU Leads	No new button
Account	Opportunities	No new button
Account	Opportunity Involved Accounts	No new button
Account	Visit Reports	Creation ok, view ok
Account	Activity History	Log a call ok, Send Email ko
Account	Account History	No related list
Account	Notes & Attachments	No new button
Account	VOC	Creation ok, view ok, VOC Customer Action Plan button ok
Contact	Creation	duplicate management
Contact	Clone	ok
Contact	Change Owner	ok
Contact	Log a call	ok
Contact	Involved Accounts	not displayed
	Related objects (lists)	
Contact	Contact Product Relationships	Creation ok, view ok
Contact	Opportunities	No new button
Contact	Open Activities	No new Task, No new event
Contact	Visit Reports	Creation ok, view ok
Contact	Activity History	Log a call ok, Send Email ko
Contact	Notes & Attachments	No new button

Opportunity

Object	Feature	Details
Opportunity	Creation	ok

Opportunity	Edition	ok
Opportunity	Change owner	ok
Opportunity	Create a Visit Report from an Opportunity	ok
Opportunity	Add products & Forecast	No button
Opportunity	Create quote	No button - handled with Quick Action
Opportunity	Update Forecast	No button
Opportunity	Clone to Recurrent Business	No button
Opportunity	Clone Opportunity	No button
Opportunity	Get Quotes from initial Opp	No button
	Related objects (lists)	
Opportunity	Cases	No New Sample creation
Opportunity	Competitive Insight	No new button
Opportunity	Cross BU Lead	Creation ok, view ok
Opportunity	Involved accounts	Creation ok, view ok
Opportunity	Involved contacts	No new button
Opportunity	Open Activities	No new Task, No new event
Opportunity	Opportunity Team	Add team member ok / Add default team ok
Opportunity	Add products	No new button
Opportunity	Quotes	No new button - handled with Quick Action
Opportunity	Visit Report Links	New Link Opportunity VisitReport working New Visit Report opens in web browser ko
Opportunity	Activity History	Log a call ko, Send Email ko
Opportunity	Stage History	ok
Opportunity	Opportunity Field History	ok
Opportunity	Notes & Attachments	No new button
Product	Creation	not possible, no product in the search results, no product tab
Product	Edition	not possible, no product in the search results
Product	Product Information section	not displayed
Product	Business Potential section	not displayed
Product	Negotiation History	not displayed
Opportunity Product	Creation	No new button on opportunity
Opportunity Product	Edition	ok
Opportunity Product	Update product button	no Update Product button
Opportunity Product	End Use Request button	no End Use Request button

Opportunity Product	Product Information section	not displayed
Opportunity Product	Business Potential section	not displayed
Opportunity Product	Negotiation History	not displayed
Cross BU Lead	Creation	ok
Cross BU Lead	Edition	ok
Cross BU Lead	Change Owner	ok
Competitive Insight	Creation	ok
Competitive Insight	Edition	
Competitive Insight	Clone	ok
Competitive Insight	Change owner of a Competitive Insight	ok
Competitive Insight	Create new Competitor Action	ok
Competitive Insight	Legal Notice message	not displayed
Competitor	Creation	ok
Competitor	Edition	ok
Competitor	Clone	ok
Competitor	Change Owner	ok
	Related objects (lists)	
Competitor	Competitive Insight	no new button
Competitor	Related Competitor	no new button
Competitor	Approval History	no new button
Competitor	Competitor Products	no new button

Quote

Object	Feature	Details
Quote	Creation	ok
Quote	Edition	ok
Quote	Clone	ok
Quote	Change Owner	ok
Quote	Submit for Approval	ok
Quote	Generate PDF button	not available
Quote	Send Last Version button	not available
Quote	Generate Contract	not available
Quote	Create quote from opportunity	not available
Quote	Create quote from scratch	ok

Account	Quick create Quote from Account	not available
	Related objects (lists)	
Quote	Quote Line Items	Creation not supported yet No Mass Update button
Quote	Activity History	No Log a call button, No Send Email button
Quote	Notes & Attachments	No new button
Quote	Approval History	Approve / Reject ok No Recall button
Quote	Open Activities	No new Task, No new Event
Quote Line Item	Creation from Quote	Creation not supported yet
Quote Line Item	Quote Line Item Edit	ok
Quote Line Item	Quote Line Item Clone	
Quote Line Item	Mass Clone	Not available
	Related objects (lists)	
Quote Line Item	Quote Line Item History	Not available

Contract

Object	Feature	Details
Quote	Generate Contract from Quote	Not available
Contract	Creation from scratch	ok
Contract	Edition	ok
Contract	Clone	ok
Contract	Change Owner	ok
Contract	Submit for approval	ok
	Related objects (lists)	
Contract	Contract Line Items	Creation ok, view ok
Contract	Visit Reports	Creation ok, view ok
Contract	Competitive Insights	Not available
Contract	Activity History	No Log a call button, No Send Email button
Contract	Open Activities	No new Task, No new Event
Contract	Notes & Attachments	No new button
Contract Line Item	Creation from contract	ok
Contract Line Item	Contract Line Item view	ok

Contract Line Item	Contract Line Item edit	ok
Contract Line Item	Contract Line Item clone	ok
	Related objects (lists)	
Contract Line Item	Contract Line Item History	Not available

Task / Event

Object	Feature	Details
Task	Creation from scratch	Not available
Event	Create/Edit from scratch	ok
Event	Create Action Items	no button
Event	Create Visit Report from Event	no button

Visit Report / Account Plan

Object	Feature	Details
Visit Report	Quick creation from Account/Contact	not available
Visit Report	Create Visit Report from scratch	ok
Visit Report	Send Visit report internally	ok
Visit Report	Send Visit report to Customer	ok
Visit Report	Report Wizard	not working
	Related objects (lists)	
Visit Report	Competitive Insights	No new button
Visit Report	Customer Contacts	Creation action redirects to mobile browser
Visit Report	Products	ok
Visit Report	Opportunity Links	New opportunity (classic layout opportunity recordtype selection) New Link Opportunity VisitReport ok
Visit Report	Visit Report Team	new Visit Report Team and Add Default Team redirects to mobile browser
Visit Report	Cross BU Leads	ok
Visit Report	Activity History	No Log a call button, no Send Email button
Visit Report	Open Activities	Tasks & Events creation OK from action bar
Visit Report	Notes & Attachments	No new button
Account Plan	Account Plan Creation	ok
Account Plan	Edit Account Plan	ok
Account Plan	Clone Account Plan	still available on UAT
Account Plan	Change Owner Account Plan	ok
Account Plan	Account Plan Business Plan	Section not displayed -> no view/no edit

	Related objects (lists)	
Account Plan	Account Plan Associations	New Account Plan association ok no New multiple Account Plan Association button
Account Plan	Account Plan Milestones	Creation ok, view ok
Account Plan	Account Plan Team	Creation ok but redirects to a blank page D-2470
Account Plan	Competitive Insights	No new button
Account Plan	Open Activities	No new Task, No new event
Account Plan	Opportunities	No new Opportunity button
Account Plan	Activity History	Log a call ko, Send Email ko
Account Plan	Notes & Attachments	No new button

Market Segmentation

Object	Feature	Details
Customer Segmentation	Capturing customer segmentation	Not possible today as the custom page to add product to an Opportunity is not supported
Customer Segmentation	New End Use Request	Not possible today as the custom page to add product to an Opportunity is not supported
Customer Segmentation	Corporate Segmentation Change Request	No Market Segmentation tab

Complaint

Object	Feature	Details
Complaint	Creation	no New Complaint button on Case tab
Complaint	Edition	no edit button
Complaint	Chatter collaboration	no standard Chatter actions
Complaint	Change owner	no change owner button
Complaint	Record view	readonly
Complaint	Record view	No process information message display
Complaint	Record view	No table in Order Information section
Complaint	Send Acknowledgment Mail button	not available
Complaint	Request Completed button	not available
Complaint	Send Customer Response button	not available
Complaint	Generate 8D Report button	not available
Complaint	Send Internal Email button	not available
	Related objects (lists)	
Complaint	Case Customer Contacts	Creation ok, view ok
Complaint	Open activities	Creation ok, view ok (R-2915 Fall 17)
Complaint	Case Team	No new button

Complaint	Case Comment	No new button
Complaint	Activity History	Log a call ko, Send Email ko
Complaint	Notes & Attachments	No new button
Complaint	Visit Reports	Creation ok, view ok

Sample Request

Object	Feature	Details
Sample	Creation	no New Complaint button on Case tab
Sample	Edition	no edit button
Sample	Chatter collaboration	no standard Chatter actions
Sample	Change owner	no change owner button
Sample	Record view	readonly
Sample	Sample Request creation from Account	creation ok, view ok
Sample	Close case button	not available
Sample	Submit for Approval button	not available
Sample	Clone Sample button	not available
	Related objects (lists)	
Sample	Case Team	no Update Case Team Members
Sample	Approval History	Approve / Reject ok No Recall button
Sample	Open Activities	Creation ok, view ok (R-2916 Fall 17)
Sample	Activity History	No Log a call button, No Send Email button
Sample	Notes & Attachments	No new button

Customer Request

Object	Feature	Details
Customer Request	Creation	no New Customer Request button on Case tab
Customer Request	Edition	no edit button
Customer Request	Chatter collaboration	no standard Chatter actions
Customer Request	Change owner	no change owner button
Customer Request	Record view	readonly
Customer Request	Creation from Account	Not available
Customer Request	Submit for Approval button	not available
Customer Request	Send Final Communication button	not available
Customer Request	Close case button	not available
Customer Request	Clone Customer Request button	not available
	Related objects (lists)	

Customer Request	Case Customer Contact	Creation ok, view ok
Customer Request	Case Account Associations	ok
Customer Request	Customer Request Products	ok
Customer Request	Approval History	Approve / Reject ok No Recall button
Customer Request	Open Activities	Creation ok, view ok (R-2917)
Customer Request	Activity History	No Log a call button, No Send Email button
Customer Request	Case Team	No Update Case Team Members button
Customer Request	Case Comments	No new button
Customer Request	Case History	Not available
Customer Request	Notes & Attachments	No new button

Voice Of the Customer (VOC)

Object	Feature	Details
VOC	Create VOC from Account	Creation ok, view ok
VOC	View VOC Customer Action Plan from Account (horizontal scrolling fixed)	ok
VOC	VOC Edit	ok
VOC	VOC Clone	ok
VOC	VOC Change Owner	ok
	Related objects (lists)	
VOC	Notes & Attachments	No new button
VOC	Open Activities	Creation ok, view ok (R-2918 Fall 17)
VOC	Activity History	No new Task, No new Event

Transactional Pricing

Object	Feature	Details
Commitment	View	ok
Commitment	Creation	ok
Commitment	Edition	ok

4. Unsupported & Unplanned for Salesforce1

Commercial Roadmap
Webform
Project Toolkit

Last modifications :

User	Last Update
Emilien GUICHARD	3171 days ago
BRAHIM, Walid	
KANJA-ext, Zakaria	
NWANGWU, Daniel	
