A User Guide For Field Work Mobility Application



Field Work Mobility APP's SYSTEM REQUIREMENTS

The FieldWorkMobility online application can run on any computer with an Internet connection and supports the following browsers:

Browser

- 1. Google Chrome[™], most recent stable version.
- 2. Mozilla[®] Firefox[®], most recent stable version.
- 3. Microsoft[®] Internet Explorer[®] versions 9, 10, and 11
- 4. Apple[®] Safari[®] versions 5.x, 6.x and 7.x on Mac OS

To Use the Data Loader for Windows

- Microsoft[®] Windows[®] 7 or Windows XP
- 120 MB of free disk space
- 256 MB of available memory
- Java JRE 1.6
- Sun JVM 1.6
- Administrator privileges on the machine

To Use the Data Loader for Mac

- Mac[®] OS X
- 120 MB of free disk space
- 256 MB of available memory
- Java JRE 1.6
- Sun JVM 1.6
- Administrator privileges on the machine

SetUp And Installation

Here are the steps for installing a package/Application

Pre-Installation Steps

1. In a browser, go to the installation URL provided by the package developer, or, if you're installing a package from the AppExchange, click **Get It Now** from the application information page.

Note



If you're installing into a sandbox, replace the www.salesforce.com portion of the installation link with test.salesforce.com. The package is removed from your sandbox organization whenever you create a new sandbox copy.

2. Enter your username and password for the Salesforce organization in which you want to install the package, and then click the login button.

Enter the requested information. For production environments, enter your username and password, read the user terms, select the I have read and agree... checkbox, and click **Install**.

For sandbox environments, complete the information in the form provided and click **Submit**. This package is removed from your sandbox organization whenever you create a new sandbox copy.

In Enterprise, Unlimited, Performance, and Developer Editions, choose a security option, and click Next:

i. Install for Admins Only

Specifies the following settings on the installing administrator's profile and any profile with the "Customize Application" permission.

- Object permissions—"Read," "Create," "Edit," "Delete," "View All," and "Modify All" enabled
- Field-level security—set to visible and editable for all fields
- Apex classes—enabled
- Visualforce pages—enabled
- App settings—enabled
- Tab settings—determined by the package creator
- Page layout settings—determined by the package creator
- Record Type settings—determined by the package creator

After installation, if you have Enterprise, Performance, Unlimited, or Developer Edition, set the appropriate user and object permissions on custom profiles as needed.

ii. Install for All Users

Specifies the following settings on all internal custom profiles.

- Object permissions—"Read," "Create," "Edit," "Delete," "View All," and "Modify All" enabled
- Field-level security—set to visible and editable for all fields
- Apex classes—enabled
- Visualforce pages—enabled
- App settings—enabled
- Tab settings—determined by the package creator
- Page layout settings—determined by the package creator
- Record Type settings—determined by the package creator

iii. Install for Specific Profiles...

Enables you to choose the usage access for all custom profiles in your organization. You can set each profile to have full access or no access for the new package and all its components.

• Full Access—Specifies the following settings for each profile.

- Object permissions—"Read," "Create," "Edit," "Delete," "View All," and "Modify All" enabled
- Field-level security—set to visible and editable for all fields
- Apex classes—enabled
- Visualforce pages—enabled
- App settings—enabled
- Tab settings—determined by the package creator
- Page layout settings—determined by the package creator
- Record Type settings—determined by the package creator

• No Access—Specifies the same settings as Full Access, *except* all object permissions are disabled.

You might see other options if the publisher has included settings for custom profiles. You can incorporate the settings of the publisher's custom profiles into your profiles without affecting your settings. Choose the name of the profile settings in the drop-down list next to the profile that you need to apply them to. The current settings in that profile remain intact.

Alternatively, click Set All next to an access level to give this setting to all user profiles.

In Enterprise, Unlimited, Performance, and Developer Editions, if you chose **Select security settings**, select the level of access to give users in each profile and click **Next**. Standard options are:

- Full Access—Specifies the following settings for each profile.
 - Object permissions—"Read," "Create," "Edit," "Delete," "View All," and "Modify All" enabled
 - Field-level security—set to visible and editable for all fields
 - Apex classes—enabled
 - Visualforce pages—enabled
 - App settings—enabled
 - Tab settings—determined by the package creator
 - Page layout settings—determined by the package creator
 - Record Type settings—determined by the package creator
- No Access—Specifies the same settings as Full Access, *except* all object permissions are disabled.

You might see other options if the publisher has included settings for custom profiles. You can incorporate the settings of the publisher's custom profiles into your profiles without affecting your settings. Choose the name of the profile settings in the drop-down list next to the profile that you need to apply them to. The current settings in that profile remain intact.

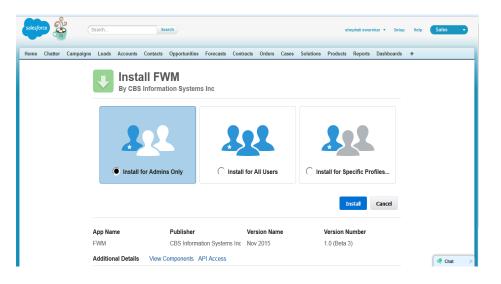
Alternatively, click Set All next to an access level to give this setting to all user profiles.

Click **Install** to install all the components in the package you have selected. See Configuring Installed Packages in the Salesforce online help to view the standard settings each type of component will have after you install. Then Click **OK**.

Step Wise Installation Guide

Once You Login in Your Salesforce Account, Copy Package URL and Paste On Address Bar and Click Enter.

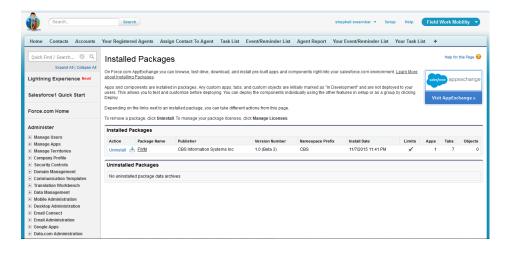
1. When You Install the Package You will get following UI



2. Choose your Option and then Click on Install. After Installation Click On Done.

salesfo	<u>به</u>		Search		Sea	arch							shephali s	warnkar 🔻	Setup	Help	Sales	
Home	Chatter	Campaigns	Leads	Accounts	Contacts	Opportunities	Forecasts	Contracts	Orders	Cases	Solutions	Products	Reports	Dashboa	ards +			
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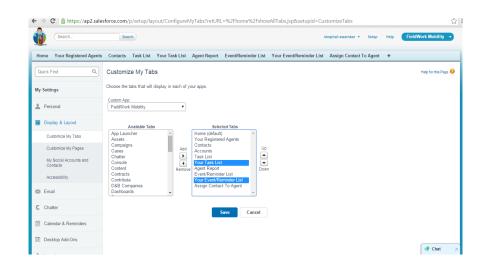
Now Click on AppMenu Drop Down List at Upper Right Corner and Choose FieldWork Mobility App As shown.

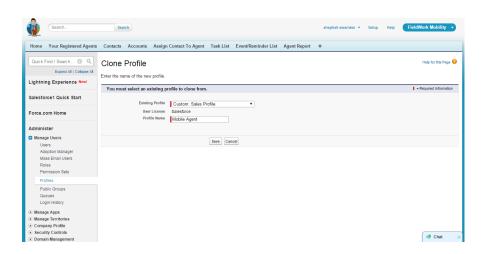


Now Click on '+' Sign Just Beside your Tabs on Tab Menu Bar and Click On Customize My Tabs

Search	Search	shephali s	swamkar 🔻 Setup Help	FieldWork Mobility 👻
Home Your Registered Agents	Contacts Task List Your Task List Agent Report	Event/Reminder List Your Event/Reminder List Assig	n Contact To Agent 🔹	
Create New 🔻	All Tabs			Help for this Page 🥹
Recent Items	Use the links below to quickly navigate to a tab. Alternative	ly, you can <u>add a tab</u> to your display to better suit the way you we	ork.	
shephali swarnkar 3/ Tim Barr	View: All Tabs		Add Tabs to Your Default I	Display Customize My Tabs
V Avi Green	Accounts	2 Ideas		Customize My
a/ Edna Frank a/ Stella Pavlova	Agent Report	💦 Leads		
1 mi vadav 1 Shibu John	Spp Launcher	🚽 Libraries		
abc soni	Assets	🗲 Macros		
Andy Young abass	State Assign Contact To Agent	Opportunities		
•—	b Campaigns Tell me more!	C Orders		
😨 Recycle Bin	Cases	<u>People</u>		
	Chatter	Price Books		
	Console	Products		
	Contacts	Profile		
	© Content	Profile Feed		
	Contracts	Profile Overview		
	1 Contribute	Reports		Chat

In This Window Add Accounts Tab And Remove ' Your Task List' And 'Your Event/Reminder List' . And Click On Save It will Look Like:





Home Your Registered	Agents Contacts	Accounts Task	List Event/	Reminder List	Assign Contact To Agent	Agent Report +				
Quick Find / Search	Agent									Help for this Page 🕢
Lightning Experience N	ew! Set the pe	rmissions and page lay	outs for this p	rofile.						
Salesforce1 Quick Start	Profile	Edit		Save	Cancel					
Force.com Home		Name User License Description	Salesforce			Custom	Profile	1		
Administer		Description								
Manage Users Users							6			
Adoption Manager	Custom	n App Settings								Required Information
Mass Email Users Roles			Visible	Default				Visible	Default	
Permission Sets		App Launcher		0			Sales	1	۲	
Profiles		Call Center		0		Salesforce C	Chatter		0	
Public Groups Queues		Community		0		Sample Co	onsole		0	
Login History		Content		0		Sit	te.com		0	
Manage Apps		FieldWork Mobility	ø	0		Wor	rk.com		0	
Manage Territories Company Profile		Marketing		0						
Security Controls Domain Management	Tab Ser	ttings								
Communication Template	es Oven	write users' personal tab	customizations							
Translation Workbench Data Management Mobile Administration	Standar	rd Tab Settings Home	Default On			Idea Ti	hemes	Tab Hidde	en 🔻	e Chat 🕫

Now Click On Set Up ->Manage User ->Profile ->New Profile -> Choose Custom: Sales Profile.

On Profile Name Box Type Any Profile Name Of Your Choice and Click On Save.

Now Click on Edit You will following Window. In This window on Custom Tab Settings Check on FieldWork Mobility Visible and Uncheck Rest. It Will look like this: Now Scroll Down And You will Get Tab Setting. In This Window You Need to Decide What All Tabs You Allow Your User/Agents To See on his window.

We request you to please choose Tab Hidden for all the tabs but Contacts.

You can Change settings anytime you want or get the requirements to allow user to see/hide the Tabs.

Now Scroll Down Here You									
will Get Custom Tab									
Settings.									
Please Choose Default On									
For' Your Event/Reminder									
List' and 'Your Task List'.									

And Tab Hidden For Rest.

Now Again Scroll Down. Here You Will Get Standard Object Permission.

Its Up to You How you giving The Permission on Object. But We Request You Uncheck delete permission on Contact Object so that the Users with this profile cannot Delete the existing contacts

Security controls Domain Management	Tab Settings					ĩ
Communication Templates	Overwrite users' personal tab cu	istomizations				
Translation Workbench						
Data Management	Standard Tab Settings Home	Default On	Idea Themes	Tab Hidden 🔻		
Mobile Administration	Accounts		Leads			
Desktop Administration		Tab Hidden 🔻		Tab Hidden 🔻		
Email Connect	App Launcher	Tab Hidden 🔻	Libraries	Tab Hidden 🔻		
Email Administration	Assets	Tab Hidden 🔻	Macros	Tab Hidden 🔻		
Google Apps	Campaigns	Default Off 🔹	Metrics	Tab Hidden 🔻		
Data.com Administration	Cases	Default On 🔻	Opportunities	Default On 🔻		
Build	Chatter	Default On 🔻	Orders	Tab Hidden 🔻		
	Coaching	Tab Hidden 🔻	People	Tab Hidden 🔻		
Customize Create	Console	Tab Hidden	Performance Cycles	Tab Hidden 🔻		
Develop	Contacts	Default On 🔻	Price Books	Tab Hidden 🔻		
Schema Builder	Content	Tab Hidden 🔻	Products	Tab Hidden 🔻		
Lightning App Builder	Contracts	Tab Hidden 🔻	Profile	Tab Hidden 🔻		
Canvas App Previewer Installed Packages	D&B Companies	Tab Hidden 🔻	Profile Coaching	Tab Hidden 🔻		
AppExchange Marketplace	Dashboards	Default On 🔻	Profile Feed	Tab Hidden 🔻		
Critical Updates	Data.com	Default Off 🔻	Profile Feedback	Tab Hidden 🔻		
	Documents	Default On 🔻	Profile Goals	Tab Hidden 🔻		
Deploy	Duplicate Record Sets	Tab Hidden 🔻	Profile Overview	Tab Hidden 🔻		
Deployment Settings	Feedback	Tab Hidden 🔻	Reports	Tab Hidden 🔻		
Deployment Status	Files	Tab Hidden 🔻	Site.com	Tab Hidden 🔻		
	Forecasts	Tab Hidden 🔻	Solutions	Tab Hidden 🔻		
Monitor	Goals	Tab Hidden 🔻	Streaming Channels	Tab Hidden 🔻		
System Overview	Groups	Tab Hidden 🔻	Subscriptions	Tab Hidden 🔻		
Imports Outbound Messages	Ideas	Tab Hidden 🔻	User Provisioning Requests	Tab Hidden 🔻	:hat	7
Time Record Modifierr						

Time-Based Workflow	Custom Tab Settings			
Automated Process Actions		Tab Hidden 🔻	Your Event/Reminder List	Default On 🔻
Case Escalations	Assign Contact To Agent	•	Your Registered Agents	•
API Usage Notifications		•		Default Off
Mass Emails	Event/Reminder List	Tab Hidden 🔻	Your Task List	Tab Hidden 🔻
Email Snapshots	Task List	Tab Hidden 🔻		
Lobs		•		

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	Basic A	ccess			Data Adm	inistration		Basic A	ccess			Data Admi	inistrati
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modif
Accounts							Goals						0
Assets	V		V				Goal Links						0
Campaigns				•			Ideas						
Cases							Leads	Ø		1	Ø		(
Coaching							Macros						(
Contacts	Ø		V				Metrics						(
Contracts							Metric Data Links						(
D&B Companies							Opportunities				V		(
Documents							Orders						(
Duplicate Record Sets							Performance Cycles						(
Feedback							Price Books	V					
Feedback Questions							Products	V					
Feedback Question Sets							Push Topics						
Feedback Requests							Solutions	Ø	Ø				(
Feedback Templates							Streaming Channels						0

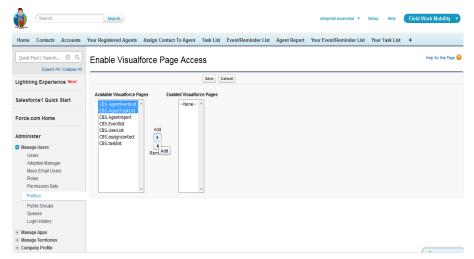
Now Scroll Down again You Will Get Option Of Enable Apex Class Access. Click on Edit Button.

	requirement				
Pa	assword question requirement	Cannot contain passw	ord		
	Maximum invalid login attempts	10			
	Lockout effective period	15 minutes			
	Obscure secret answer for password resets				
	Require a minimum 1 day password lifetime				
			Edit Clone Delete View Users		
L	ogin Hours		Edit	Login Hours Help 🛞	
	No login hours specified				
L	ogin IP Ranges		New	Login IP Ranges Help 🕐	
1	No login IP ranges specified. User	s from any IP address a	re allowed to log in.		
E	nabled Apex Class Access		Edit	Enabled Apex Class Access Help 🔞	
	No Apex Classes enabled		Edit		
E	nabled Visualforce Page A	ccess	Edit	Enabled Visualforce Page Access Help 📀	
	No Visualforce Pages enabled				
E	nabled External Data Sour	ce Access	Edit	Enabled External Data Source Access Help (?)	1
	No External Data Sources enabled	I			
E	nabled Named Credential J	Access	Edit	Enabled Named Creden 🧶 Chat	7

Here Choose the classes shown in here "CBS.agent_event" and "CBS.agent_task" and click on Add Button. Then Click On Save.

Search	Search					shephali swarnkar 🔻	Setup Help	Field Work Mobility 🔹
Home Contacts Accounts	Your Registered Agents	Assign Contact To Agent	Task List	Event/Reminder List	Agent Report	Your Event/Reminder	List Your Task L	ist +
Quick Find / Search 🕖 🔍 Expand Al Collapse All	Enable Apex	Class Access						Help for this Page 🕢
Lightning Experience New!			Save Ca	incel				
Salesforce1 Quick Start	Available Apex Class CBS.ContactWrapper CBS.CustomIterable		ises					
Force.com Home	CBS.cdstomiterable CBS.agent_event CBS.agent_task	Add						
Administer Manage Users Users Adoption Manager Mass Email Users Roles Permission Sets		Remove						
Profiles Public Groups Queues Login History Manage Apps Manage Territories Company Profile								

In the Same way click on Enable Visualforce Page Access and Add "CBS.AgentEventList" and "CBS.AgentTaskList" click on Add and Then Click on save.



In This Steps we Are ready with profile Permission set on Objects and Tabs Now we can create Users with this profile. Also you can Assign this profile to existing Users.

You Can Now Create Users:

Now Click on SetUp- >Manage Users-	Search	Search			5	hephali swamkar 💌	Setup He	slp Fi	ieldWork Mobility 👻
>Users	Home Your Registered Agents	Contacts Accounts Assi	gn Contact To Agent Task	k List Event/Reminder List	Agent Report 🛛 🕂				
203013	Quick Find / Search () Q	User Edit Shibu John							Help for this Page 🥝
Fill All details of user									
and choose a Role	Lightning Experience New!	User Edit	Save	Save & New Cancel					
for user.	Salesforce1 Quick Start	General Information							Required Information
			Shibu		Role	Channel Gales Tee	m	•	
On User License	Force.com Home		John		User License Profile	Calcolore		•	
choose salesForce.	Administer	Email	sjohn shibu@cbsinfosys.com		Active	moune rigen		• i	
	Manage Users	Username	shibu@cbsinfosys.com shibujohnjc@gmail.com		Marketing User				
And For Profile: You	Users		shibu		Offline User				
Can now choose the	Adoption Manager	Title	siibu		Knowledge User				
profile you have just	Mass Email Users	Company			Force.com Flow User	_			
	Roles Permission Sets	Department			Service Cloud User				
Created.	Profiles	Division		Sil	te.com Contributor User				
	Public Groups				Site.com Publisher User				
After that click on	Queues Login History				Work.com User				
After that click off	Manage Apps				Salesforce Classic User				
Save.	Manage Territories				Mobile Configuration			Q	
	Company Profile				Data.com User Type	None •] [
	Security Controls Domain Management			Dat	a.com Monthly Addition Limit	300	• i	0	🔍 Chat 🛛 🛪

Now Move Tab Wise Explanation with Its Working:

In "Your Registered Agents" Tab You Can See All Your Added Agents/Users. When You Click On Any of Agent's Name It will Show You Agent's Detailed Information.

e Your Registered	Agents Contacts A	ccounts Assign Contact To Ager	nt – Lask List	Event/Reminder List	Agent Report +		
ur Registered Agen	nts						
List of Agents				Details			
Agent Name	Profile	UserID/Email ID	Active	User Detail	Edit	Reset Password	Freeze
Manoj Yadav	Agent	manojyadav.cbs@gmail.com	1	ober Detail	Edit	Reset Password	r reeze
Shephali Swarnkar	System Administrator	shephali.swarnkar@gmail.com	1	Name	Manoj Yadav myada	Role User License	agent Salesforce
				Email	manoiyadav.cbs@gmail.com	Profile	Agent
				Username	manojyadav.cbs@gmail.com	Active	1
				Nickname	Manoj 💷	Marketing User	
				Title		Offline User	
				Company		Knowledge User	
				Department		Force.com Flow User	
				Division		Service Cloud User	
				Address		Site.com Contributor User	
				Time Zone	(GMT+05:30) India Standard Time (Asla/Kolkata)	Site.com Publisher User	
				Locale	English (United States)	Work.com User	
				Language	English	Salesforce Classic User	
				Delegated		Mobile	

This is Account Tab where you can keep All Company/Account Details.

٠	Search	Search				shephal	swarnkar 💌	Setup	Help	FieldWork Mobility 🔹
Home	Your Registered Agents	Contacts Accounts Assig	gn Contact To Agent	Task List	Event/Reminder List	Agent Report +				
Create		New Account Edit								Help for this Page 🥹
Recen	t items vadav	Account Edit		Save Sa	we & New Cancel					
	bu John	Account Information								Required Information
	<u>soni</u> I Barr	Account Owne	r shephali swamkar			Ratin	-None-			
	ty Young	Account Name	e I			Phon	e			
🌒 <u>aba</u>		Parent Account	t	9	5	Fa	×			
	iley James hur Song	Account Number	r			Websit	e			
	phali swamkar	Account Site	e			Ticker Symbo	d			
		Тур		۲		Ownershi	- NONE	• •		
TH Po	cycle Bin	Industry		۳		Employee				
- Car 140	Cycle Dill	Annual Revenue	e			SIC Cod	e			
		Address Information							Copy Billing	Address to Shipping Address
		Billing Stree	e [Shipping Stree				
										le la
		Billing City	У			Shipping Cit	У			
		Billing State/Province				Shipping State/Provinc				
		Billing Zip/Postal Code				Shipping Zip/Postal Cod				
		Billing Country	у			Shipping Countr	y			🔍 Chat 🛛

This is Contact Tab where You Can keep All Contacts.

Search	Search			Shephali Swamkar 🔻	Setup Help	FieldWork Mobility 🔹
Home Your Registered Agents	Contacts Accounts Assign	Contact To Agent Task List	Event/Reminder List Agent Report	+		
Create New	Contact Edit New Contact Contacts not associated with accou	nts are private and cannot be vie	wed by other users or included in reports.			Help for this Page 😧
	Contact Edit	Save	Save & New Cancel			
🔯 Recycle Bin	Contact Information					= Required Information
	Contact Owner First Name Last Name Account Name Title Last Called Bichtdate Report TO Lead Source Do Not Call		9 9	Phone		
	Address Information Mailing Street	,		Other Street	Copy Ma	iling Address to Other Address

Here We Are showing you the default Picklist Options in LeadSource .

You Will Need to change these Picklist options In order to get the proper reports of your added User/agents.

In next we will get the navigation that how you can change the it.

١	Search	Search			shephali sw	amkar 🔻	Setup	Help	FieldWork Mobility 🔹
Home	Your Registered Agents	Contacts Accounts Assign	Contact To Agent Task List	Event/Reminder List Agent Rep	ort 🕈				
Create	New v	New Contact							Help for this Page 🥹
Recen		Contacts not associated with account	nts are private and cannot be vie	wed by other users or included in repor	S.				(
	dy Young	Contact Edit	Save	ave & New Cancel					
👗 <u>mi</u> 📦 ab;	<u>vadav</u> ass	Contact Information							= Required Information
	ibu John	Contact Owner	shephali swarnkar		Phone				
	nley James	First Name	None T		Home Phone				
	hur Song aphali swarnkar	Last Name			Mobile				
a 2115	opriali owarrinal	Account Name		3	Other Phone				
		Title			Fax				
Re Re	cycle Bin	Department			Email				
		Birthdate			Assistant				
		Reports To		5	Asst. Phone				
		Lead Source	-None						
		Address Information	Web Phone Inquiry				1	Copy Mailin	g Address to Other Address
		Mailing Street	Partner Referral Purchased List		Other Street				
		Mailing City	Other		Other City				
		Mailing State/Province			ther State/Province				Chat 7
		Mailing Zip/Postal Code		0	her Zin/Postal Code	-			🔍 Chat 🖉

Click on SetUp->Customize-> Click on Contacts->Fileds.

This is the Contacts Standards Filds.

Double Click on Lead Source Field.

Salesforce1 Quick Start			Set History Trac	king		
	Contact Star	ndard Fields			Contact Sta	ndard Fields Help
Force.com Home	Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
Administer	Edit	Account Name	Account	Lookup(Account)		1
	Edit	Assistant	AssistantName	Text(40)		
 Manage Users 	Edit	Asst. Phone	AssistantPhone	Phone		
Manage Apps	Edit	Birthdate	Birthdate	Date		
Manage Territories Company Profile	Edit	Clean Status	CleanStatus	Picklist		1
Security Controls	Edit	Contact Owner	Owner	Lookup(User)		1
Domain Management	Lon	Created By	CreatedBy	Lookup(User)		
Communication Templates	Edit		Jigsaw	Text(20)		
Translation Workbench		Data.com Key				
Data Management	Edit	Department	Department	Text(80)		
Mobile Administration	Edit	Description	Description	Long Text Area(32000)		
Desktop Administration	Edit	Do Not Call	DoNotCall	Checkbox		
Email Connect	Edit	Email	Email	Email		1
Email Administration	Edit	Email Opt Out	HasOptedOutOfEmail	Checkbox		
Google Apps Data.com Administration	Edit	Fax	Fax	Fax		
Data.com Administration	Edit	Fax Opt Out	HasOptedOutOfFax	Checkbox		
	Edit	Home Phone	HomePhone	Phone		
Build		Last Modified By	LastModifiedBy	Lookup(User)		
Customize	Edit	Last Stay-in-Touch Request Date	LastCURequestDate	Date/Time		
Tab Names and Labels	Edit	Last Stay-in-Touch Save Date	LastCUUpdateDate	Date/Time		
Home Activities	Replace Edit	Lead Source	LeadSource	Picklist		
Campaigns		Mailing Address	MailingAddress	Address		
Leads	Edit	Mobile	MobilePhone	Phone		
Accounts		Name	Name	Name		1
						<u> </u>

Scroll Down at bottom You will Get Account Lead Sorce Picklist Values.

Related

Click on Edit one by one Change each Picklist Values

Your Final Picklist Values Should be Changed to option Given here.

	Help T	ext			
Administer Manage Users Manage Apps	Field Dependencies		New		Field Dependencies Help 🕐
Manage Territories Company Profile Security Controls Domain Management	Validation Rules		New		Validation Rules Help 🕐
Communication Templates Translation Workbench Data Management Mobile Administration	Account/Lead Source P			Printable View Chart Colors •	Account/Lead Source Picklist Values Help 🕐
Desktop Administration	Action Values Edit Del Contact	Default	Chart Colors Assigned dynamically	Modified By shephali swamkar, 11/3/2015 11:19 PM	
Email Connect Email Administration	Edit Del Lead	• 	Assigned dynamically Assigned dynamically	shephali swamkar, 11/3/2015 11:19 PM	
Google Apps	Edit Del Prospect		Assigned dynamically Assigned dynamically	shephali swamkar, 11/3/2015 11:24 PM	
Data.com Administration	Edit Del Client		Assigned dynamically Assigned dynamically	shephali swamkar, 11/3/2015 11:20 PM	
Build	Edit Del Other		Assigned dynamically	shephali swamkar, 10/27/2015 12:54 AM	
Customize Customize Tab Names and Labels Home Activities Campaigns Leads Accounts D&B& Companies Contacts Fields					

Chat 🤉

Now You Can Check the Changed Picklist Option in Contact Tab under leadsource

3/ Andy Young 1 mi yaday	Contact Edit	Save Save & New Can	cel		
in reserve	Contact Information				Required Information
L Shibu John	Contact Owner	shephali swarnkar	Phone		
Ashley James Arthur Song	First Name	None T	Home Phone		
shephali swarnkar	Last Name		Mobile		
-	Account Name	Q	Other Phone		
Recycle Bin	Title		Fax		
W Recycle Bill	Department		Email		
	Birthdate		Assistant		
	Reports To	۹.	Asst. Phone		
	Lead Source	Contact -None			
	Address Information	Contact Lead		Copy Mailin	ng Address to Other Add
	Mailing Street	Prospect Client	Other Street		
	Mailing City	Other	Other City		
	Mailing State/Province		Other State/Province		
	Mailing Zip/Postal Code		Other Zip/Postal Code		
	Mailing Country		Other Country		
	Additional Information				
	Languages		Level	None V	

Now If you want to allow user to get only their Assigned Contact You Need To Change Org-Wide Defaults for Contact Object To 'Private'.

For This Click On SetUp->Security Controls->Sharing Settings->Edit

You Will Get This Window Then GoTo Contact Object and Change Its Default Internal Access To Private. Click Save.

Using 'Assign Contact To Agent' Tab You Can Assign Contact To the User You Have Created.

You Can Filter the Your Contact List and Assign the Checked Contacts to Selected User/Agent.

Search	Search		shephali swarr	nkar 🔹 Setup Help FieldWork Mobility 👻
Home Your Registered Agents Co	ontacts Accounts Assign	Contact To Agent Task List Event/Remind	der List Agent Report 🔸	
Quick Find / Search () Q Expand All Collapse All	Edit your organization-wide sh	de Sharing Defaults Edit aring defaults below. Changing these defaults will	cause all sharing rules to be recalculated. Th	Help for this Page 🥑
Lightning Experience New!	depending on the amount of d be extended using sharing rul		ate makes records visible to record owners an	id those above them in the role hierarchy, and access ca
Salesforce1 Quick Start		Save		
Force.com Home	Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
	Lead	Public Read/Write/Transfer V	Public Read/Write/Transfer	×
Administer	Account and Contract	Public Read/Write ▼	Public Read/Write	×
Manage Users	Order	Controlled by Parent *	Controlled by Parent	8
 Manage Apps 	Contact	Private •	Private	w.
 Manage Territories 	Asset	Controlled by Parent	Controlled by Parent	2
Company Profile	Opportunity	Private Public Read Only	Public Read/Write	8
Security Controls	Case	Public Read/Write	Public Read/Write/Transfer	2
Sharing Settings	Campaign	Public Full Access 🔻	Public Full Access	3
Field Accessibility	User	Public Read Only	Private •	8
Password Policies Session Settings	Activity	Private •	Private	2
Login Flows	Calendar	Hide Details and Add Events	Hide Details and Add Events	3
Network Access	Price Book	Use	Use	A
Activations	Coaching	Private	Private	×
Session Management	Goal	Private	Private	×
Login Access Policies Certificate and Key Management	Macro	Private	Private	
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ne	Your Registered Agents	Contacts Accounts Assign Cont	Contact Has Assigned to Selected Agent	+				
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Bearch	Name Sean Forbes	Email sean@edge.com	Phone (512) 757-6000	Account Name Edge Communications	• [10	Owner shephali swarnkar		

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This is List View on Contact Tab here you Can See the Contact Details that which Contacts Has Been Assigned To Which User.

Search	Search			shephali swamkar 🔻 Setup Help	FieldWork Mobility
Home Your Registered Ag	jents Contacts Accounts A	ssign Contact To Agent Task List	Event/Reminder List Agent Report	+	
Create New	admin_view	 Edit Delete Create New View 	,		🖽 List 🔺 Feed 🖨
				3 H I J K L M N O P Q R S T	
Recent Items	New Contact Add to Camp	aign C2	ABIOIDIEITI	3 1 1 0 K C M N 0 P Q N 3 1	1010101W1X111210016
Avi Green	Action Name †	Account Name Phone	Email Lead Sou	rce Department Notes	Owner First
Edna Frank	🗧 Edit Del 🜐 <u>Barr. Tim</u>	Grand Hotels & Re (312) 5	96-1000 <u>barr_tim@grandhot</u> External	Referral Finance	mi
Stella Pavlova	Edit Del 🜐 Bond, John	Grand Hotels & Re (312) 5	96-1000 bond john@grand External	Referral Facilities	shephali
<u>mi yadav</u>	Edit Del 🜐 Boyle, Lau	an United Oil & Gas C (212) 8	42-5500 Iboyle@uog.com Public R	elations Technology	shephali
Shibu John	Edit Del 🜐 D'Cruz, Liz	United Oil & Gas, S (650) 4	50-8810 Ideruz@uog.com Public R	elations Production	shephali
abc soni i Tim Barr	Edit Del 🜐 Davis, Josh	Express Logistics a (503) 4	21-7800 <u>i.davis@expressl&t</u> Word of	nouth Warehouse Mgmt	shephali
Andy Young	Edit Del 🜐 Forbes. Se	n Edge Communicati (512) 7	57-6000 <u>sean@edge.com</u> Trade Sł	ow Finance	shephali
i abass	Edit Del 🜐 Frank, Edn	GenePoint (650) 8	67-3450 <u>efrank@genepoint</u> Partner	Technology	mi
Ashley James	Edit Del 🜐 Gonzalez, I	tose Edge Communicati (512) 7	57-6000 <u>rose@edge.com</u> Trade Sł	ow Procurement	shephali
	Edit Del 🜐 <u>Green, Avi</u>	United Oil & Gas C (212) 8	42-5500 agreen@uog.com Public R	elations Finance	mi
_	Edit Del 🜐 Grey, Jane	University of Arizona (520) 7	73-9050 jane grav@uoa.edu Word of i	nouth Administration	shephali
🦉 Recycle Bin	Edit Del 🜐 James, Ast	ley United Oil & Gas, UK +44 19	1 4956203 ajames@uog.com Public R	elations 30 Oct 2015	Shibu
	Edit Del 🜐 Levy, Baba	a Express Logistics a (503) 4	21-7800 <u>b.levv@expressl&t</u> Word of	nouth Operations	shephali
	🗏 Edit Del 🜐 Llorrac, Jal	e <u>sForce</u>			shephali
	Edit Del 🜐 Nedaerk, S	ddartha sForce			shephali
	Edit Del 😝 Pavlova, Si	ella United Oil & Gas C (212) 8	42-5500 spavlova@uog.c Public R	elations Production	mi
	Edit Del 😲 Ripley, Ton	United Oil & Gas (650) 4	50-8810 triplev@uog.com Public R-	elations Executive Team	shephali
	📄 Edit Del 😝 Rogers, Ja	k Burlington Textiles (336) 2	22-7000 irogers@burlington Contact		shephali
	4 				
	1-20 of 20 • 0 Selected	-1			Chat

When You Click On Any Of the Contact Name You get Such Window Shown Here.

Search

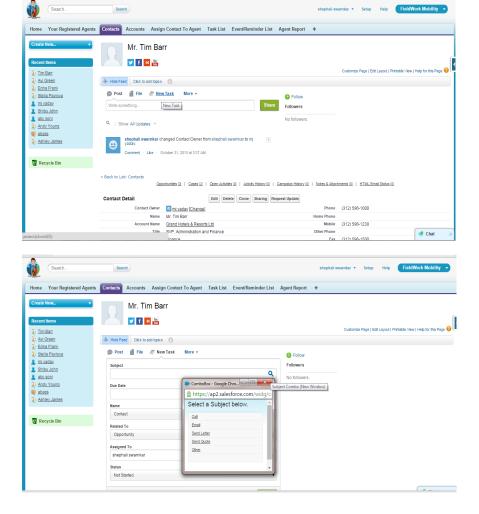
Search

Here By Clicking on New Task You Can Assign Task Related To The Contact.

On Subject Panel by Clicking on Task Subject

search Icon You Can Choose The

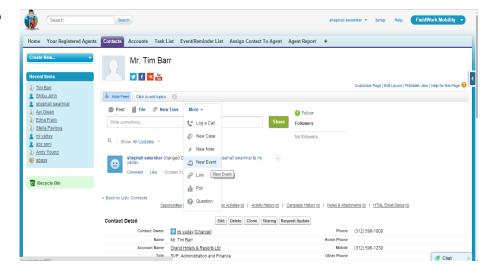
After Putting Related Information Click on Create Button At Bottom.



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a) <u>Tim Barr</u> a) <u>Avi Green</u>	Hide Feed Click to add topics			Customize Page Edit Layout Printable View Help for this Page 🥹
Edna Frank Simila Pavlova mi vadav snibu John abc soni Andv / Konna waass	Post File PrevTask More + Subject Call Dee Date 11/7/2015	Q. <u>11/5/2015</u>	Follow Followers No followers.	
Ashley James Recycle Bin	Name Contact Tim Barr	٩		
u ,	Related To Account	Q,		
	Assigned To mj yadav	Q		
	Status Not Started	۲		
		Create		
	Q Show All Updates ~	Create		

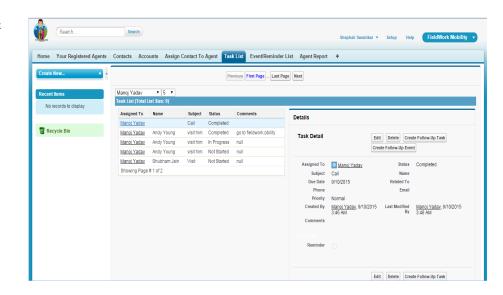
In The Same Way You can also Create Event related to each Contact.



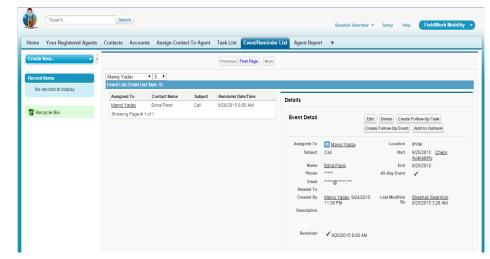
When You Click on New Event The Will Look Like Shown Here. You Can Put Related Information and Click On Create .It will Save

<u>Tim Barr</u>			Customize F	
Shibu John shephali swarnkar	Hide Feed Click to add topics (7)			
Avi Green	😰 Post 📲 File 🥒 New Task 🛛 New Event 🔻		Follow	
Edna Frank	^		owers	
Stella Pavlova	Subject		owers	
mi yadav	Meeting	Q No f	ollowers.	
abc soni	Start	9:23 PM		
Andy Young	11/7/2015 10:00 PM			
abass	End	9:23 PM		
	11/13/2015 11:00 PM	<u>9.23 PM</u>		
Recycle Bin	11/13/2015			
	All-Day Event			
	Name			
	Contact • Tim Barr	Q		
	Related To			
	Opportunity •	Q		
	Assigned To			
	shephali swamkar	Q		
	Location			
	CA			
		Create		

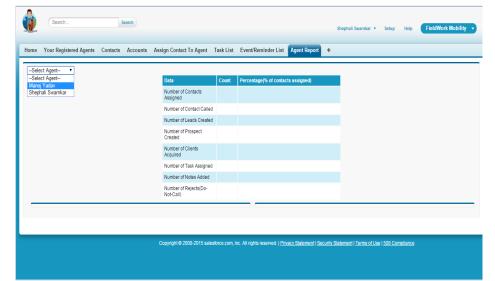
Now when you Click on Task List Tab You Check All The Assigned Task To Your User/Agents



In The Even/Reminder List You Check All The Events Assigned To Or created by Your Agents. Also perform Edit/Delete On Those Events.



In Agent Report Tab You Can See The Your Active Agents/Users Report. Select The Agent From Picklist It Will Show Selected Agent's Report.



When Select the agent it will show his report like how many contacts has been assigned by to that agent. How many contact's has turn to Leads, Prospects, Clients. Also How many tasks assigned to him how many notes he has added and how many contacts he put as reject.

Manoj Yadav 🔹					
	Data	Count	Percentage(% of contacts assigned)		
	Number of Contacts Assigned	<u>10</u>	100.00		
	Number of Contact Called	1	10.00		
	Number of Leads Created	2	20.00		
	Number of Prospect Created	2	20.00		
	Number of Clients Acquired	1	10.00		
	Number of Task Assigned	<u>9</u>	90.00		
	Number of Notes Added	<u>5</u>	50.00		
	Number of Rejects(Do- Not-Call)	2	20.00		
		2	20.00		

Now when you Click on Any Count it will show further detail of that report in bottom and also when you click on any of contact name link it will show you its detail. As shown Here .

From here you can perform edit ,delete action using respective buttons.

e Your Regi	stered Agents Contacts	Accounts As	sign Contact To A	gent	Task List	Event/R	leminder Lis	t Agent	Report +					
anoj Yadav	T													
			Data		Count	Percentag	ge(% of conta	cts assign	ed)					
			Number of Contact Assigned	s	10	100.00								
			Number of Contact	Called	1	10.00								
			Number of Leads (reated	2	20.00								
			Number of Prosper Created	t	2	20.00								
			Number of Clients Acquired		1	10.00								
			Number of Task As	signed	9	90.00								
			Number of Notes A	dded	<u>5</u>	50.00								
			Number of Rejects Not-Call)	Do-	2	20.00								
Contact Name	Account Name	Mobile	Phone	Descrip	otion		Conta	ct Detail		(and the second s				
Joy Mukherji	ABC College	(958) 489-0768	null	call joy	mukhrji tod	ay	oomu	or Detail		Edit	Delete	Clone	Sharing	Request Update
Ashley James	United Oil & Gas, UK	+44 191 3456234	+44 191 4956203	i will m	eet him		Conta	act Owner	Manoj Yad	av (Change)		Phone	null	
Liz D'Cruz	United Oil & Gas, Singapore	(650) 345-6637	(650) 450-8810	Iwanti	meet him to	norow.		Name	Joy Mukherji		Но	me Phone		
Avi Green	United Oil & Gas Corp.	(212) 842-2383	(212) 842-5500	i also v	vanna termi	nate,	Accor	unt Name	ABC College			Mobile	(958)	489-0768
Shubham Jain	Ginger	916752111000	null	i met	shubham			Title	null		Ot	her Phone		