

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.

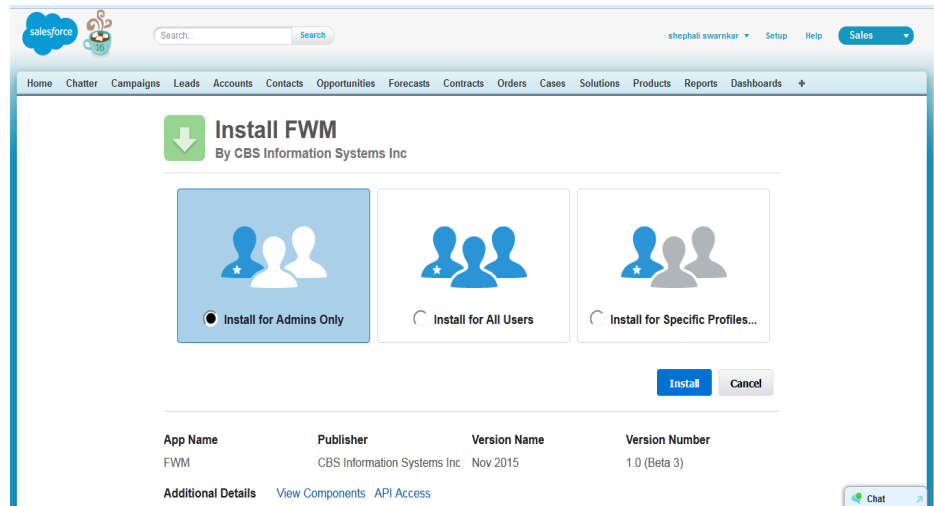
Alternatively, click **Set All** next to an access level to give this setting to all user profiles.

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**.

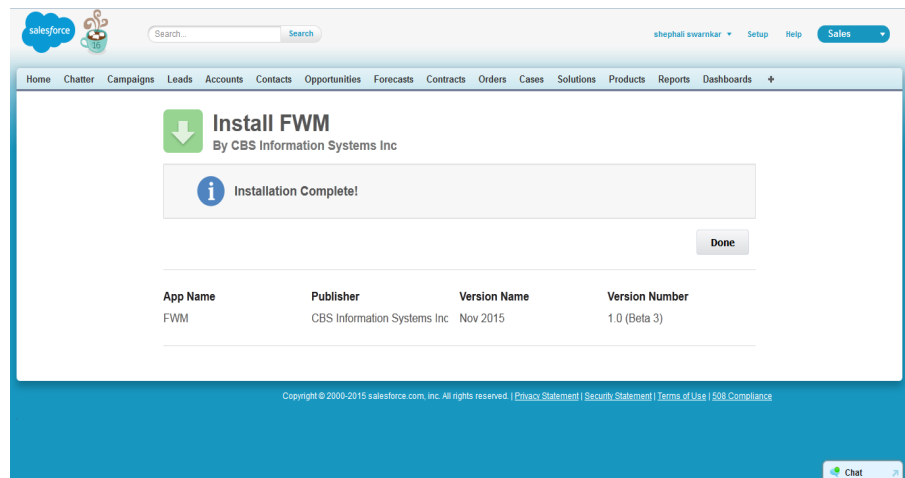
Step Wise Installation Guide

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.



Now Click on AppMenu Drop Down List at Upper Right Corner and Choose FieldWork Mobility App As shown.

Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
Uninstall	EVM	CBS Information Systems Inc	1.0 (Beta 3)	CBS	11/7/2015 11:41 PM	✓	1	7	0

Uninstalled Packages

No uninstalled package data archives

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

All Tabs

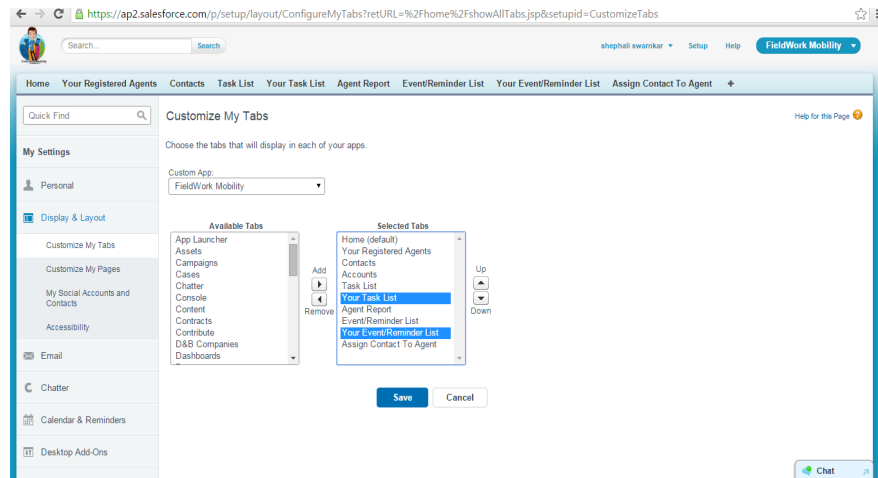
Use the links below to quickly navigate to a tab. Alternatively, you can [add a tab](#) to your display to better suit the way you work.

View: All Tabs

Add Tabs to Your Default Display [Customize My Tabs](#)

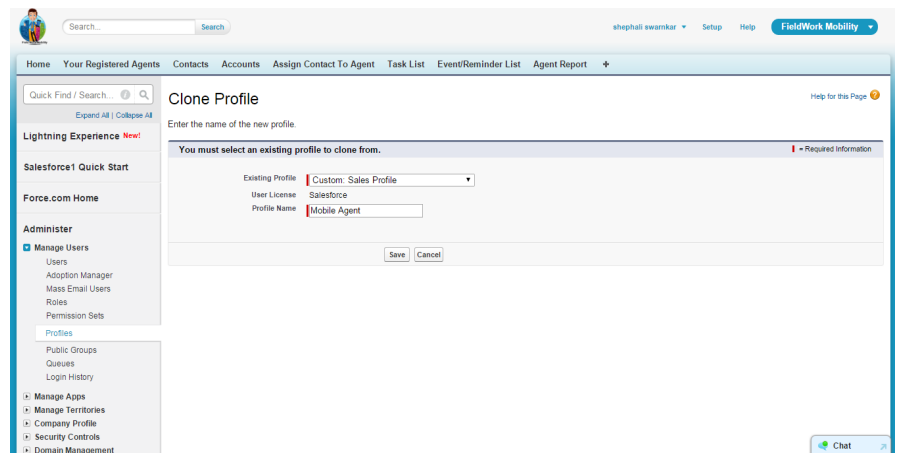
[Customize My Tabs](#)

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

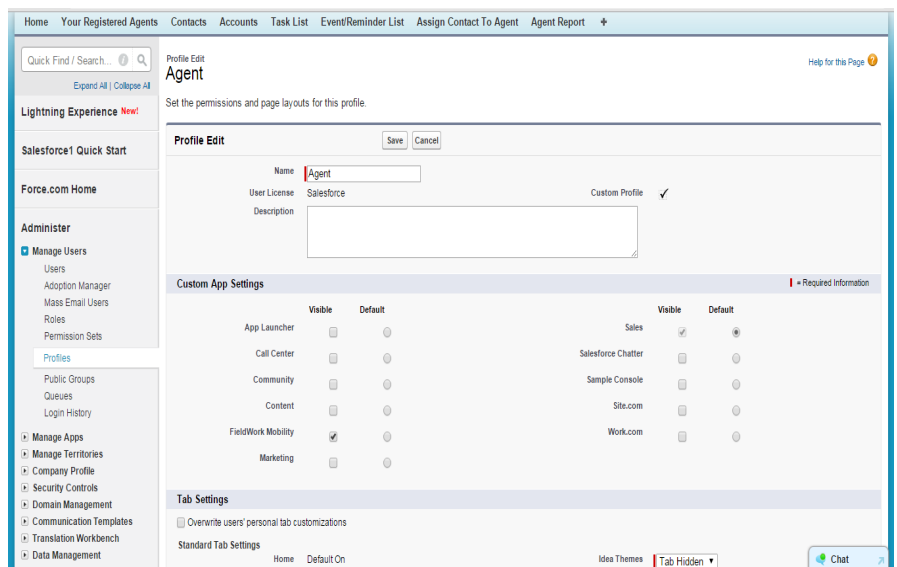


Now Click On Set Up ->Manage User ->Profile ->New Profile -> Choose Custom: Sales Profile.

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

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

The screenshot shows the 'User Management' page in Salesforce. The 'Password Policy' section is expanded, showing settings for password question requirement, maximum invalid login attempts (10), and lockout effective period (15 minutes). Below this, the 'Login Hours' section is visible with an 'Edit' button. The 'Login IP Ranges' section also has a 'New' button. The 'Enabled Apex Class Access' section is highlighted, showing 'No Apex Classes enabled' and an 'Edit' button. Other sections include 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', and 'Enabled Named Credential Access', each with an 'Edit' button.

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

The screenshot shows the 'Enable Apex Class Access' dialog box. It has two columns: 'Available Apex Classes' and 'Enabled Apex Classes'. In the 'Available Apex Classes' column, 'CBS.agent_event' and 'CBS.agent_task' are selected. The 'Enabled Apex Classes' column is currently empty. There are 'Add' and 'Remove' buttons between the columns. At the top right, there are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the 'Enable Visualforce Page Access' dialog box. It has two columns: 'Available Visualforce Pages' and 'Enabled Visualforce Pages'. In the 'Available Visualforce Pages' column, 'CBS.AgentEventList' and 'CBS.AgentTaskList' are selected. The 'Enabled Visualforce Pages' column is currently empty. There are 'Add' and 'Remove' buttons between the columns. At the top right, there are 'Save' and 'Cancel' buttons.

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->Users

Fill All details of user and choose a Role for user.

On User License choose salesForce. And For Profile: You Can now choose the profile you have just Created.

After that click on Save.

The screenshot shows the 'User Edit' form for a user named Shibu John. The form is divided into two main sections: 'General Information' and 'User Edit'. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'User Edit' section contains fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Force.com Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, Work.com User, Salesforce Classic User, Mobile Configuration, Data.com User Type, and Data.com Monthly Addition Limit. The form is titled 'User Edit' and 'Shibu John'. The 'User Edit' section has buttons for 'Save', 'Save & New', and 'Cancel'. The 'General Information' section has a red bar indicating 'Required Information'.

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.

The screenshot shows the 'Your Registered Agents' tab in Salesforce. It displays a list of agents with columns for Agent Name, Profile, User ID/Email ID, and Active. The list includes Manoj Yadav and Shephali Swarnkar. The 'Details' section shows the user details for Manoj Yadav, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, and Delegated Approver.

Agent Name	Profile	User ID/Email ID	Active
Manoj Yadav	Agent	manojyadav.cbs@gmail.com	✓
Shephali Swarnkar	System Administrator	shephali.swarnkar@gmail.com	✓

User Detail

Name	Manoj Yadav	Role	agent
Alias	myada	User License	Salesforce
Email	manojyadav.cbs@gmail.com	Profile	Agent
Username	manojyadav.cbs@gmail.com	Active	✓
Nickname	Manoj	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Force.com Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	Work.com User	<input type="checkbox"/>
Language	English	Salesforce Classic User	<input type="checkbox"/>
Delegated Approver		Mobile Configuration	<input type="checkbox"/>

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

This is Contact Tab where You Can keep All Contacts.

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.

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

This is the Contacts Standards
Filds.

Double Click on Lead Source
Field.

Salesforce Quick Start

Force.com Home

Administrator

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Connect
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts

Set History Tracking

Contact Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
Edit	Account Name	Account	Lookup(Account)		✓
Edit	Assistant	AssistantName	Text(40)		
Edit	Asst. Phone	AssistantPhone	Phone		
Edit	Birthday	Birthday	Date		
Edit	Clean Status	CleanStatus	Picklist		✓
Edit	Contact Owner	Owner	Lookup(User)		✓
	Created By	CreatedBy	Lookup(User)		
Edit	Data.com Key	Jigsaw	Text(20)		
Edit	Department	Department	Text(80)		
Edit	Description	Description	Long Text Area(32000)		
Edit	Do Not Call	DoNotCall	Checkbox		
Edit	Email	Email	Email		✓
Edit	Email Opt Out	HasOptedOutOfEmail	Checkbox		
Edit	Fax	Fax	Fax		
Edit	Fax Opt Out	HasOptedOutOfFax	Checkbox		
Edit	Home Phone	HomePhone	Phone		
	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	Last Stay-in-Touch Request Date	LastCURequestDate	DateTime		
Edit	Last Stay-in-Touch Save Date	LastCUUpdateDate	DateTime		
Replace Edit	Lead Source	LeadSource	Picklist		
	Mailing Address	MailingAddress	Address		
Edit	Mobile	MobilePhone	Phone		
	Name	Name	Name		✓

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

Click on Edit one by one
Change each Picklist Values

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

Help Text

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Account/Lead Source Picklist Values

Action	Values	Default	Chart Colors	Modified By
Edit Del	Contact	✓	Assigned dynamically	shephali swarnikar, 11/3/2015 11:19 PM
Edit Del	Lead		Assigned dynamically	shephali swarnikar, 11/3/2015 11:24 PM
Edit Del	Prospect		Assigned dynamically	shephali swarnikar, 11/3/2015 11:26 PM
Edit Del	Client		Assigned dynamically	shephali swarnikar, 11/3/2015 11:43 PM
Edit Del	Other		Assigned dynamically	shephali swarnikar, 10/27/2015 12:54 AM

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

Recent Items

- Tim Barr
- Andy Young
- ml vadav
- abasa
- Shibu John
- Arthur James
- Arthur Song
- shephali swarnikar

Recycle Bin

Related Lookup Filters

Validation Rules

Chat

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

Contact Edit

Save Save & New Cancel

Contact Information

Contact Owner: shephali swarnikar

First Name: --None--

Last Name:

Account Name:

Title:

Department:

Birthday:

Reports To:

Lead Source: Contact

Address Information

Mailing Street:

Mailing City:

Mailing State/Province:

Mailing Zip/Postal Code:

Mailing Country:

Other Street:

Other City:

Other State/Province:

Other Zip/Postal Code:

Other Country:

Additional Information

Languages:

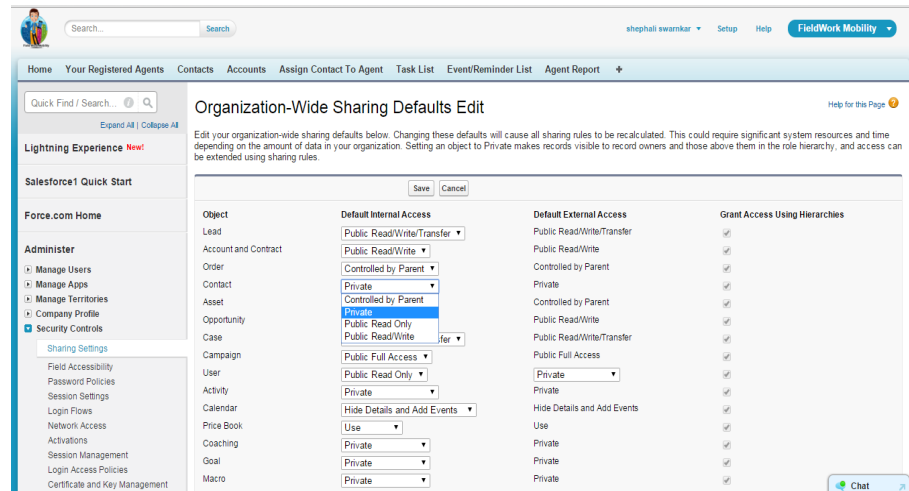
Level: --None--

Description Information

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'.

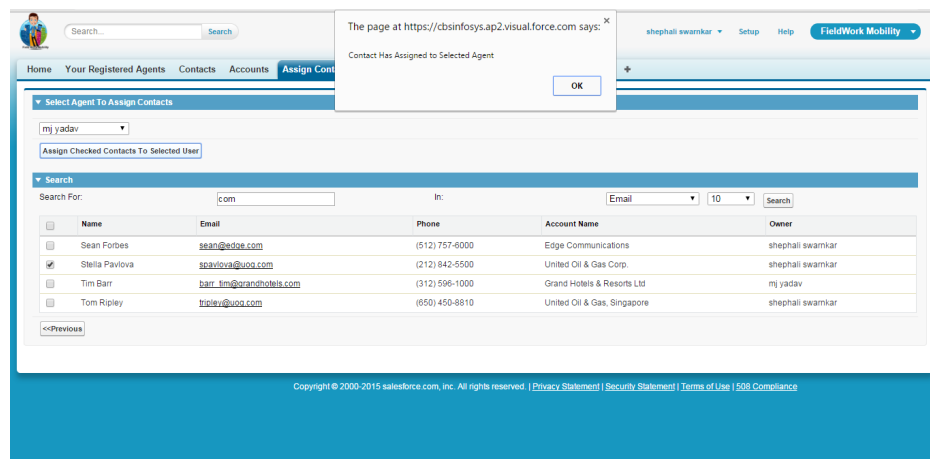
For This Click On SetUp->Security Controls->Sharing Settings->Edit

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

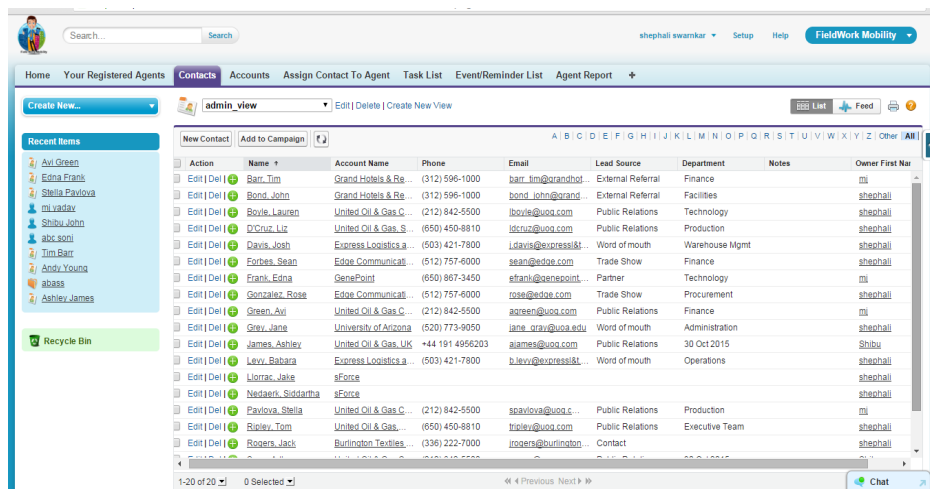


Using 'Assign Contact To Agent' Tab You Can Assign Contact To the User You Have Created.

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

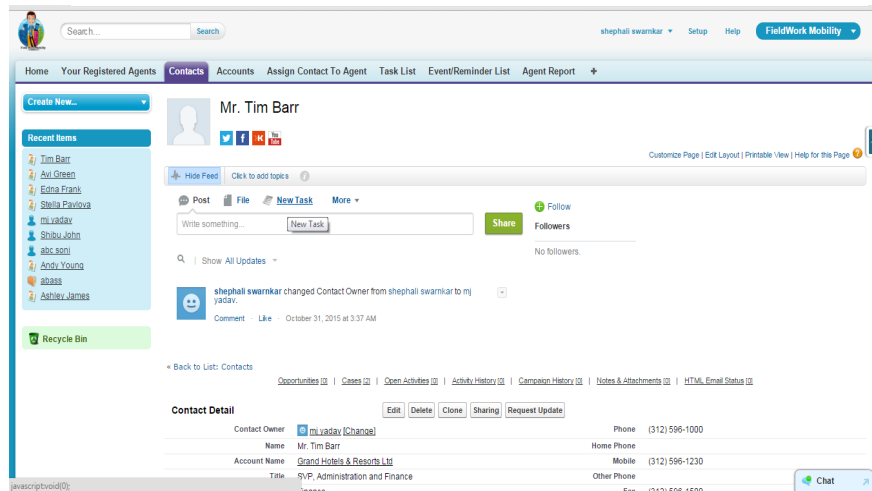


This is List View on Contact Tab here you Can See the Contact Details that which Contacts Has Been Assigned To Which User.

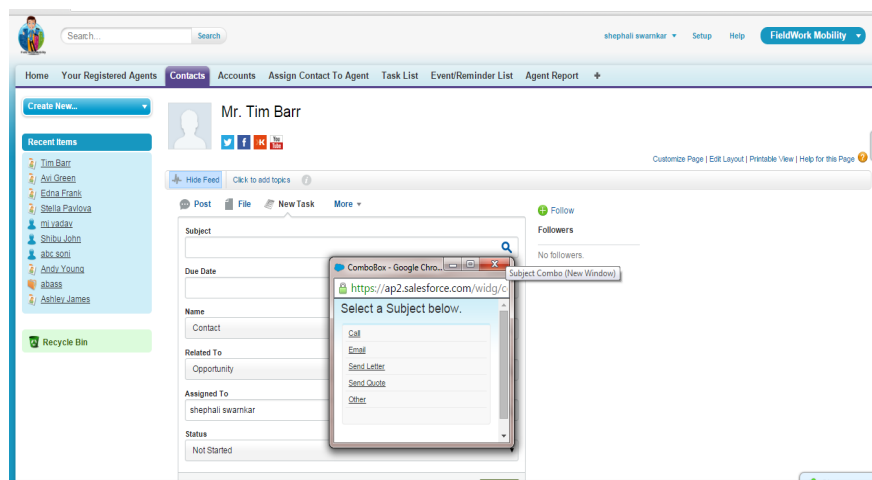


When You Click On Any Of the Contact Name You get Such Window Shown Here.

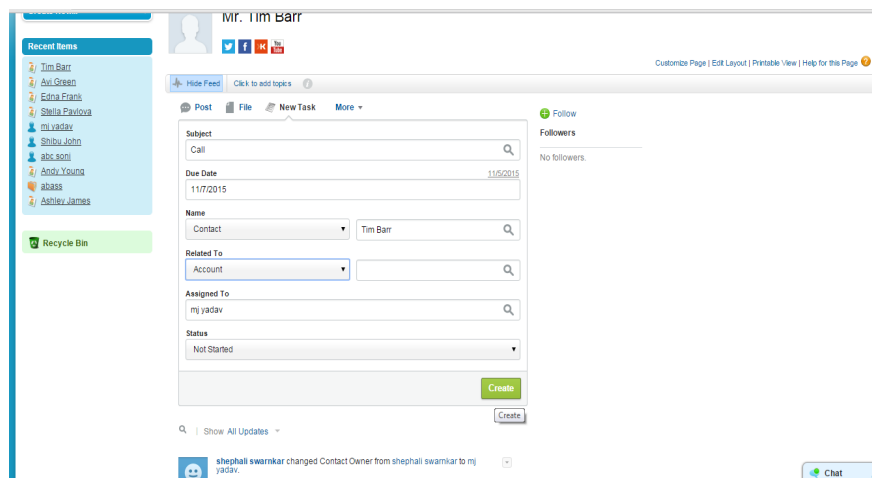
Here By Clicking on New Task You Can Assign Task Related To The Contact.



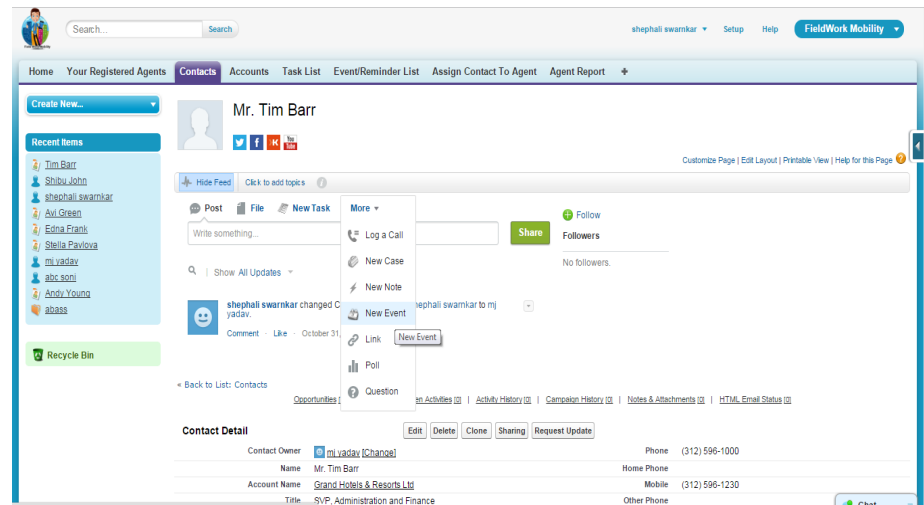
On Subject Panel by Clicking on search Icon You Can Choose The Task Subject



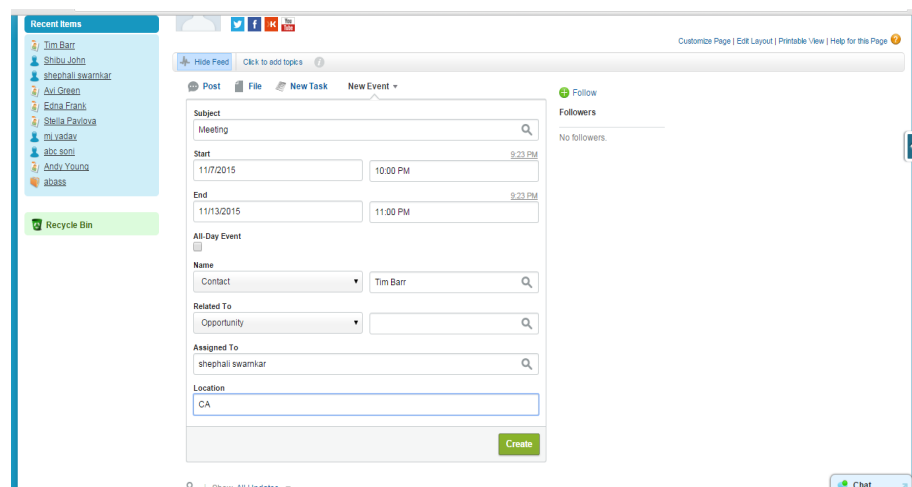
After Putting Related Information Click on Create Button At Bottom.



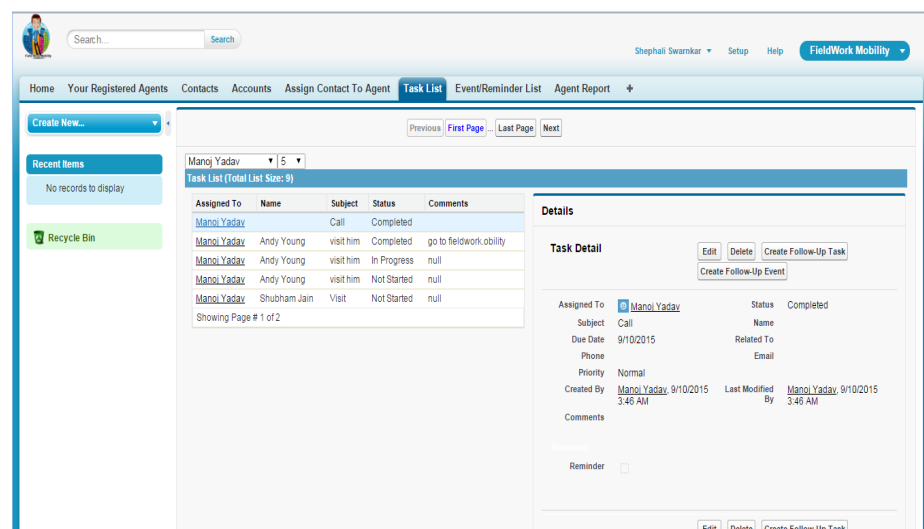
In The Same Way You can also Create Event related to each Contact.



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



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.

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...

Recent Items
No records to display

Recycle Bin

Manoj Yadav
Event List (Total List Size: 1)

Assigned To	Contact Name	Subject	Reminder Date/Time
Manoj Yadav	Edna Frank	Call	9/26/2015 8:00 AM

Showing Page # 1 of 1

Details

Event Detail

Edit Delete Create Follow-Up Task
Create Follow-Up Event Add to Outlook

Assigned To ☒ Manoj Yadav Location bhlal
Subject Call Start 9/25/2015 [Check Availability](#)
Name Edna Frank End 9/25/2015
Phone ***** All-Day Event ☒
Email *****
Related To
Created By Manoj Yadav, 9/24/2015 11:38 PM Last Modified By Shephali Swamkar, 9/25/2015 3:26 AM
Description
Reminder ☒ 9/26/2015 8:00 AM

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.

Search...

Shephali Swamkar Setup Help FieldWork Mobility

Home Your Registered Agents Contacts Accounts Assign Contact To Agent Task List Event/Reminder List **Agent Report**

-Select Agent--
-Select Agent--
Manoj Yadav
Shephali Swamkar

Data	Count	Percentage(% of contacts assigned)
Number of Contacts Assigned		
Number of Contact Called		
Number of Leads Created		
Number of Prospect Created		
Number of Clients Acquired		
Number of Task Assigned		
Number of Notes Added		
Number of Rejects(Do-Not-Call)		

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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.

Search...

Shephali Swamkar Setup Help FieldWork Mobility

Home Your Registered Agents Contacts Accounts Assign Contact To Agent Task List Event/Reminder List **Agent Report**

Manoj Yadav

Data	Count	Percentage(% of contacts assigned)
Number of Contacts Assigned	10	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	9	90.00
Number of Notes Added	5	50.00
Number of Rejects(Do-Not-Call)	2	20.00

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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.

Search...

Search

Shephali SwarnkarSetupHelpFieldWork Mobility

HomeYour Registered AgentsContactsAccountsAssign Contact To AgentTask ListEvent/Reminder ListAgent Report

Manoj Yadav

Data	Count	Percentage(% of contacts assigned)
Number of Contacts Assigned	10	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	2	90.00
Number of Notes Added	5	50.00
Number of Rejects(Do-Not-Call)	2	20.00

Contact Name	Account Name	Mobile	Phone	Description
Joy Mukherji	ABC College	(958) 489-0768	null	call joy mukherji today
Ashley James	United Oil & Gas, UK	+44 191 3456234	+44 191 4956203	I will meet him...
Liz D'Cruz	United Oil & Gas, Singapore	(650) 345-6637	(650) 450-8810	I want meet him tomorrow.
Avi Green	United Oil & Gas Corp.	(212) 842-2383	(212) 842-5500	I also wanna terminate...
Shubham Jain	Ginger	91675211000	null	I met... shubham

Contact Detail

EditDeleteCloneSharingRequest Update

Contact Owner

Manoj YadavChange

Phone

null

Name

Joy Mukherji

Home Phone

Account Name

ABC College

Mobile

(958) 489-0768

Title

null

Other Phone

Last Called

Fax

Birthdate

Email

Reports To

View Org Chart

Assistant