A User Guide For Field Work Mobility Application

Field Work Mobility

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.

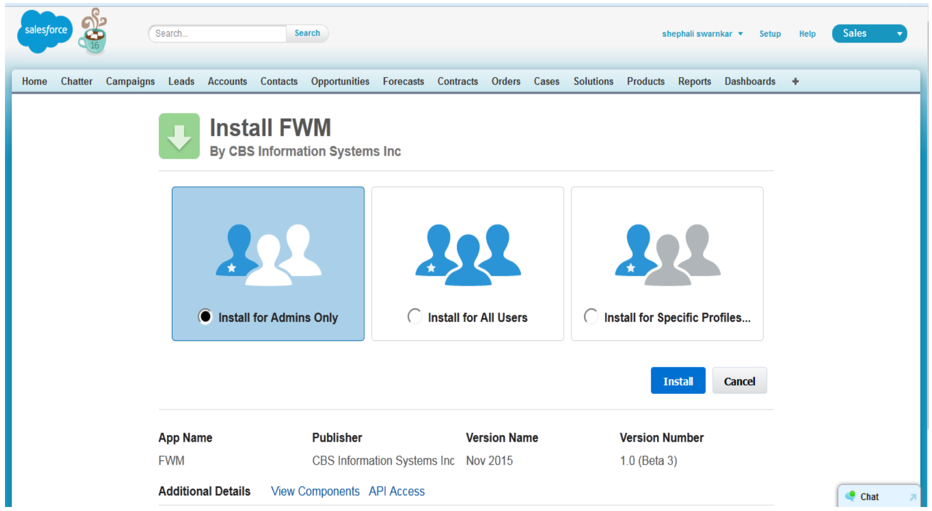
Alternatively, click **Set All** next to an access level to give this setting to all user profiles.

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**.

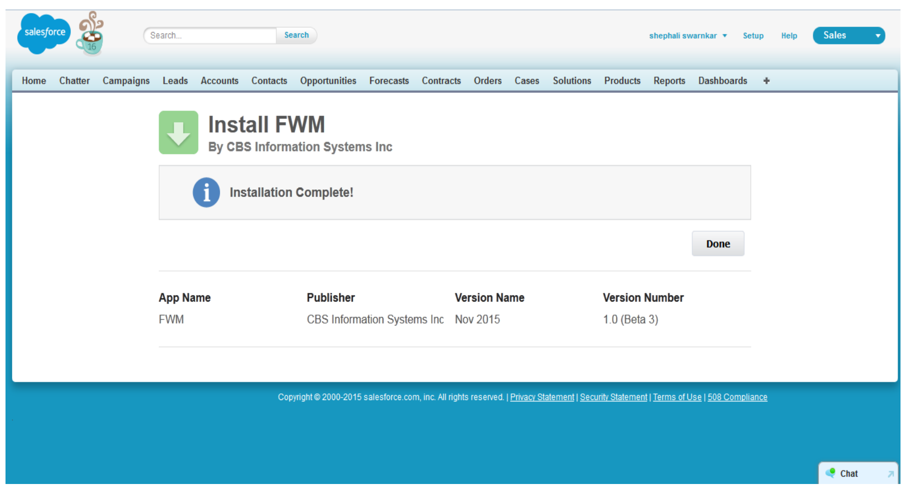
Step Wise Installation Guide

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

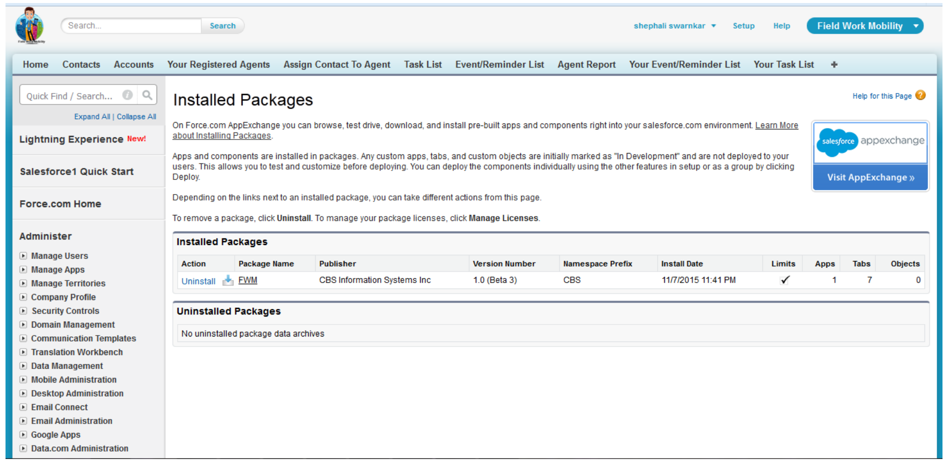
1. When You Install the Package You will get following UI



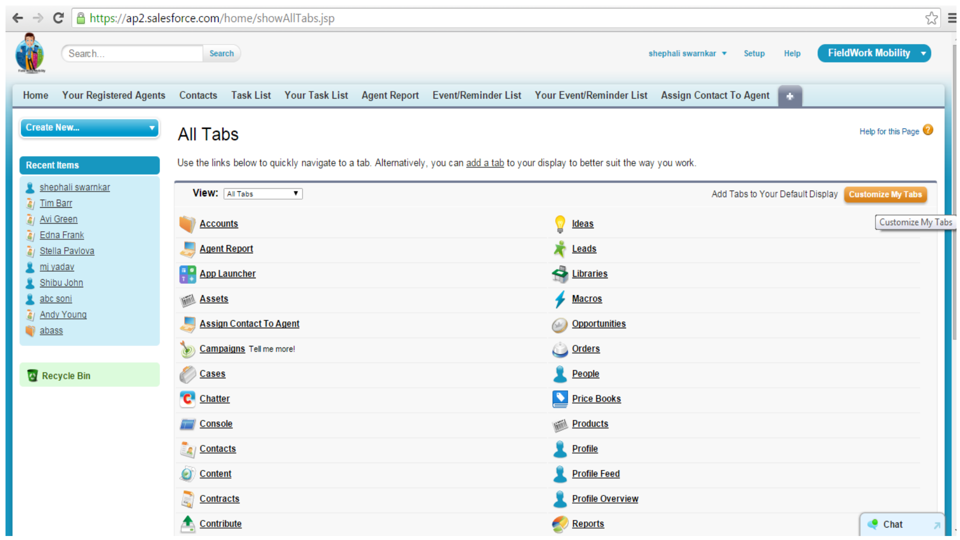
2. **Choose your Option and then Click on Install. After Installation Click On Done.**



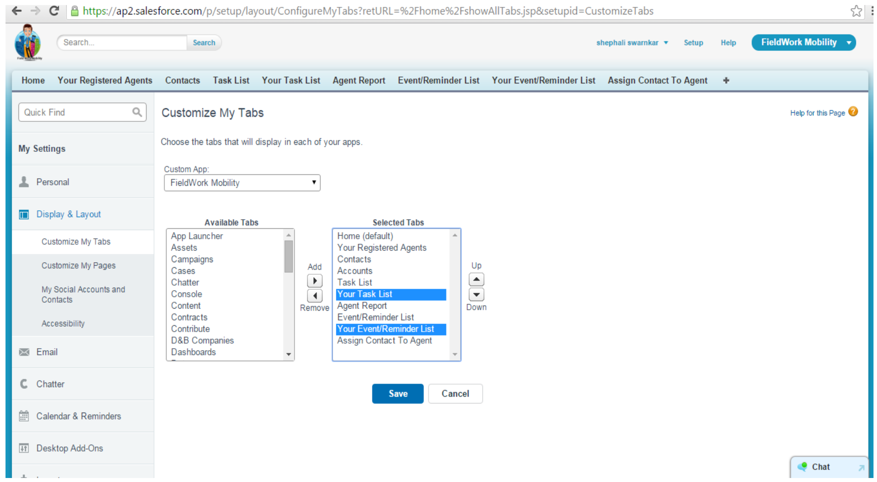
Now Click on AppMenu Drop Down List at Upper Right Corner and Choose FieldWork Mobility App As shown.



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

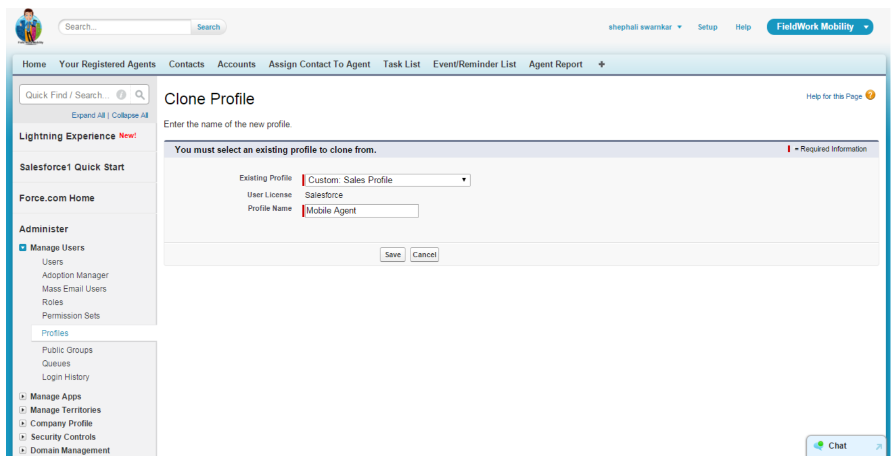


In This Window Add Accounts Tab And Remove ‘ Your Task List’ And ‘Your Event/Reminder List’ . And Click On Save It will Look Like:

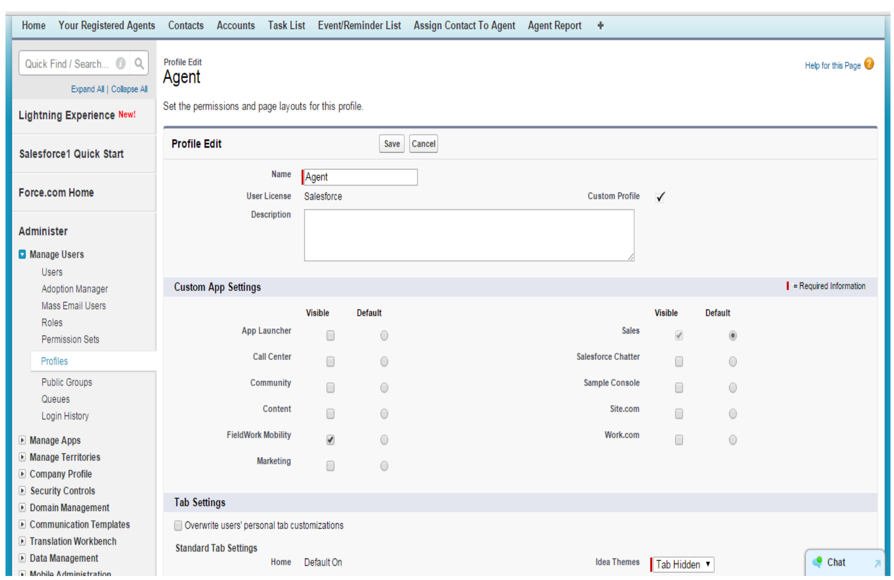


Now Click On Set Up ->Manage User ->Profile ->New Profile -> Choose Custom: Sales Profile.

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



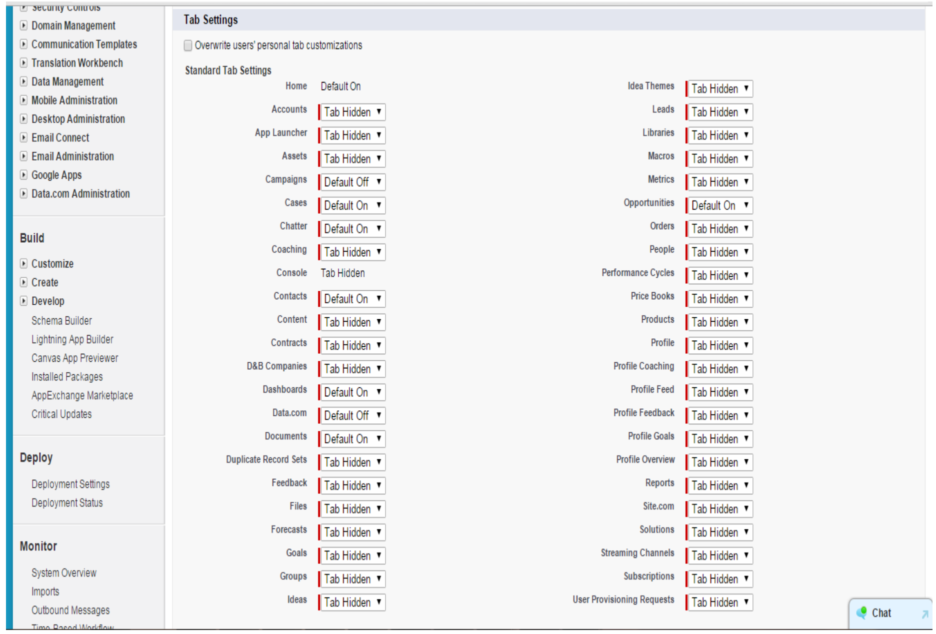
Now Click on Edit You will following Window. In This window on Custom Tab Settings Check on FieldWork Mobility Visible and Uncheck Rest.
It Will look like this:



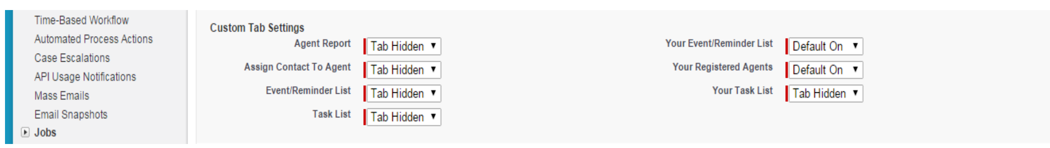
Now Scroll Down And You will Get Tab Setting. In This Window You Need to Decide What All Tabs You Allow Your User/Agents To See on his window.

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.

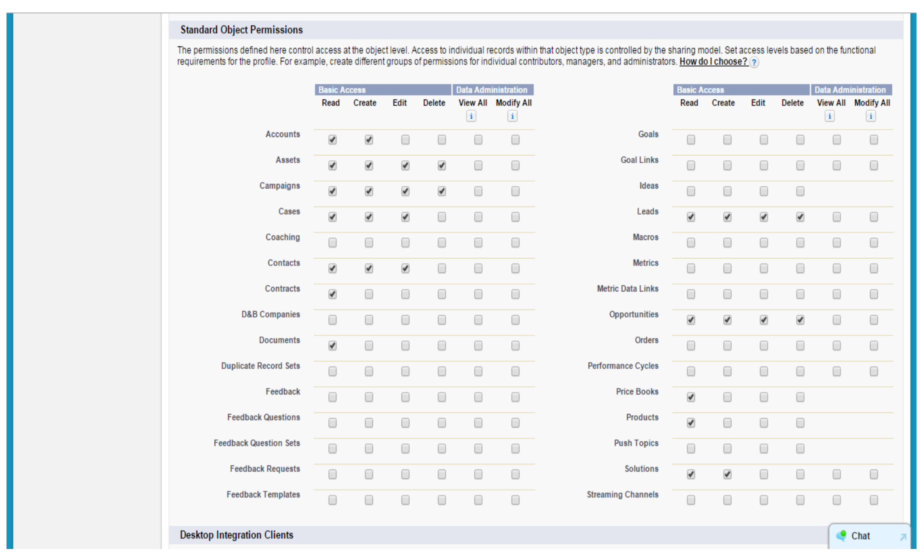


Now Scroll Down Here You will Get Custom Tab Settings.
Please Choose Default On For' Your Event/Reminder List' and 'Your Task List'.
And Tab Hidden For Rest.

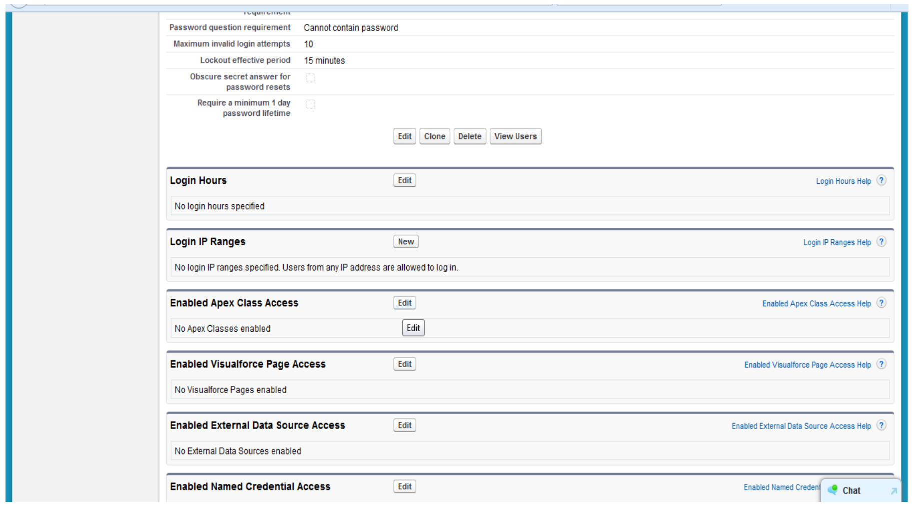


Now Again Scroll Down. Here You Will Get Standard Object Permission.

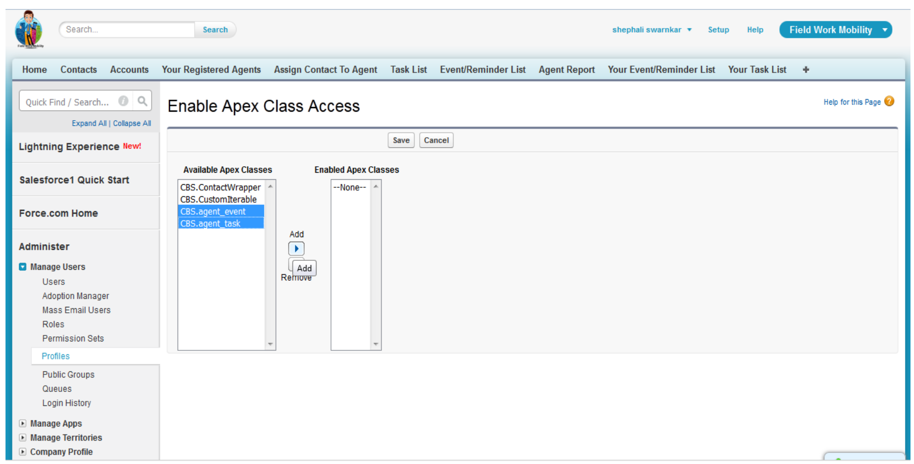
Its Up to You How you giving The Permission on Object. But We Request You Uncheck delete permission on Contact Object so that the Users with this profile cannot Delete the existing contacts



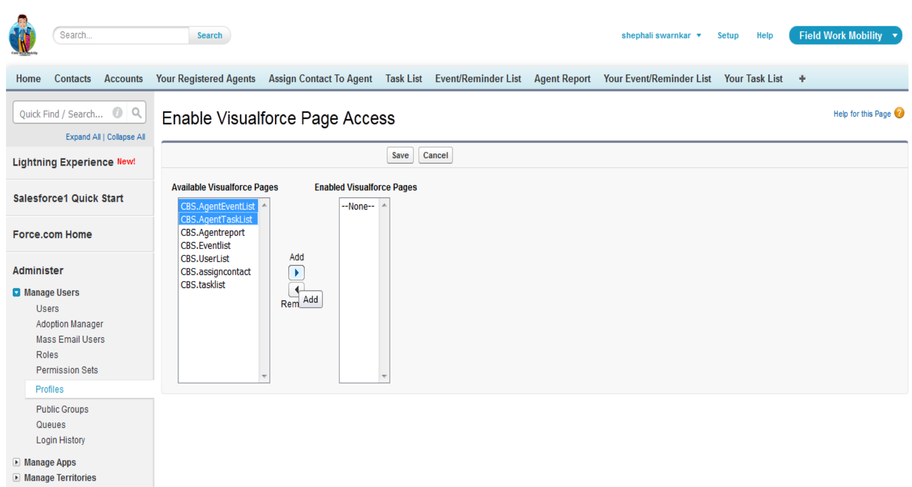
Now Scroll Down again You Will Get Option Of Enable Apex Class Access. Click on Edit Button.



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



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.



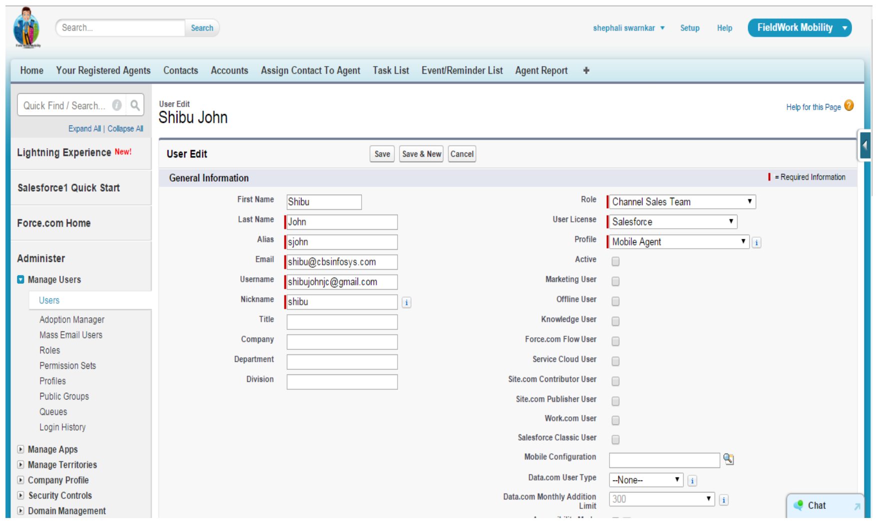
In This Steps we Are ready with profile Permission set on Objects and Tabs Now we can create Users with this profile. Also you can Assign this profile to existing Users.

You Can Now Create Users:

Now Click on SetUp->Manage Users->Users

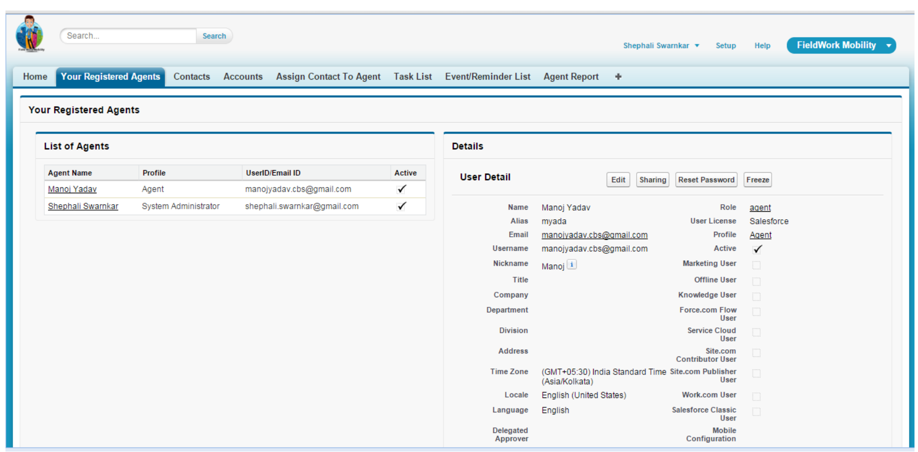
Fill All details of user and choose a Role for user.
On User License choose salesForce.
And For Profile: You Can now choose the profile you have just Created.

After that click on Save.

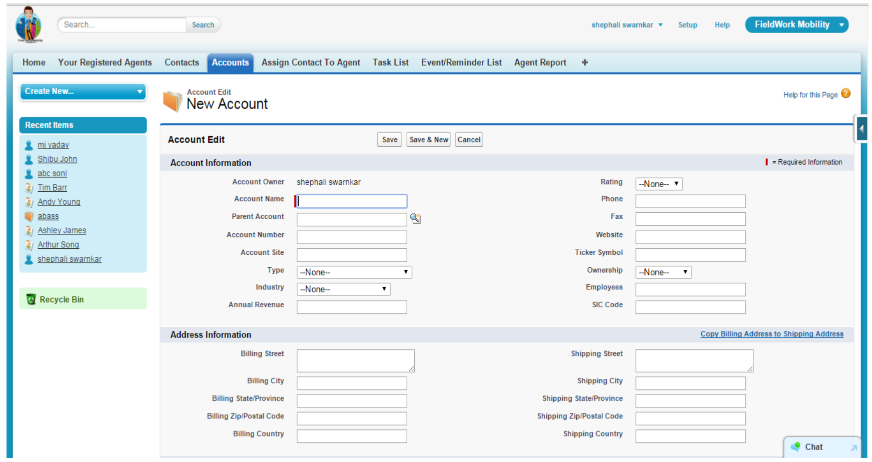


Now Move Tab Wise Explanation with Its Working:

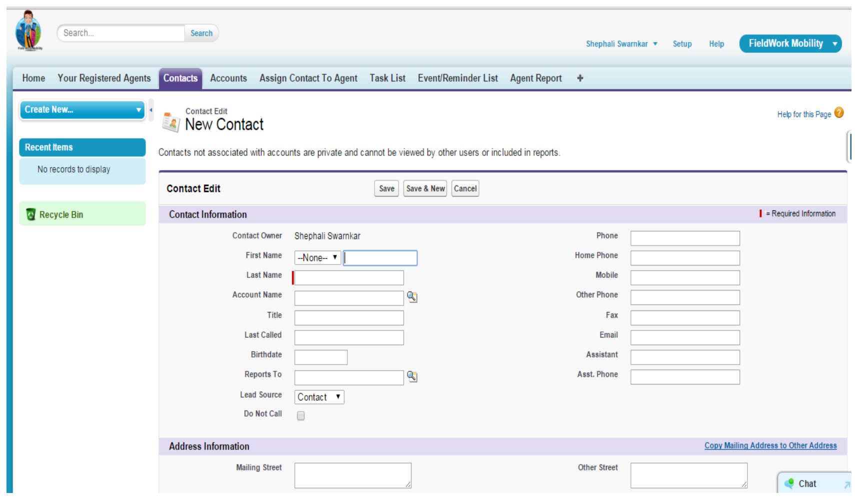
In "Your Registered Agents" Tab You Can See All Your Added Agents/Users.
When You Click On Any of Agent's Name It will Show You Agent's Detailed Information.



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



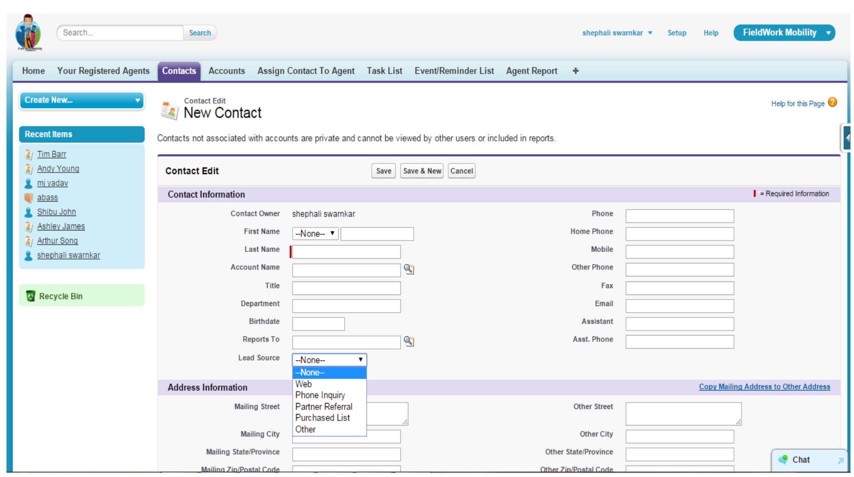
This is Contact Tab where You Can keep All Contacts.



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.

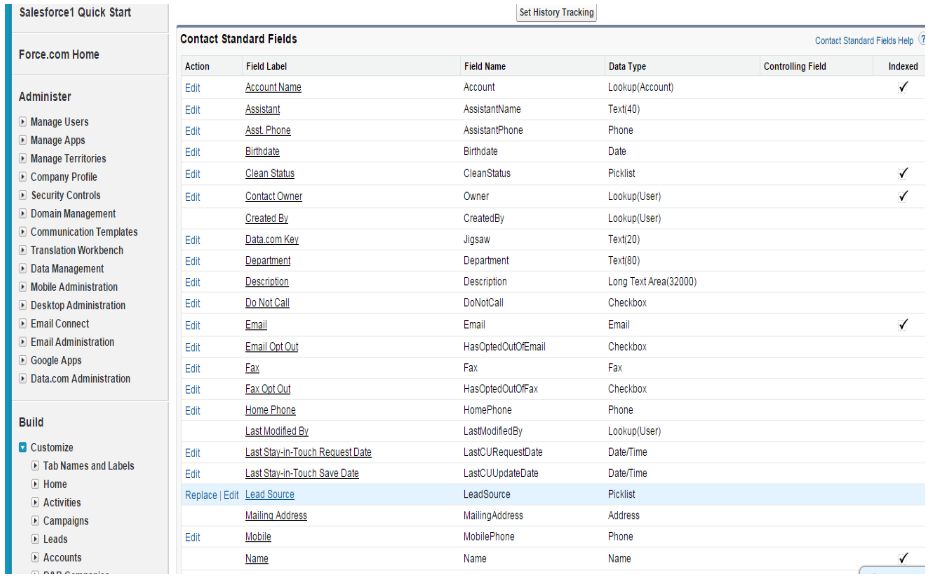
In next we will get the navigation that how you can change the it.



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

This is the Contacts Standards Filds.

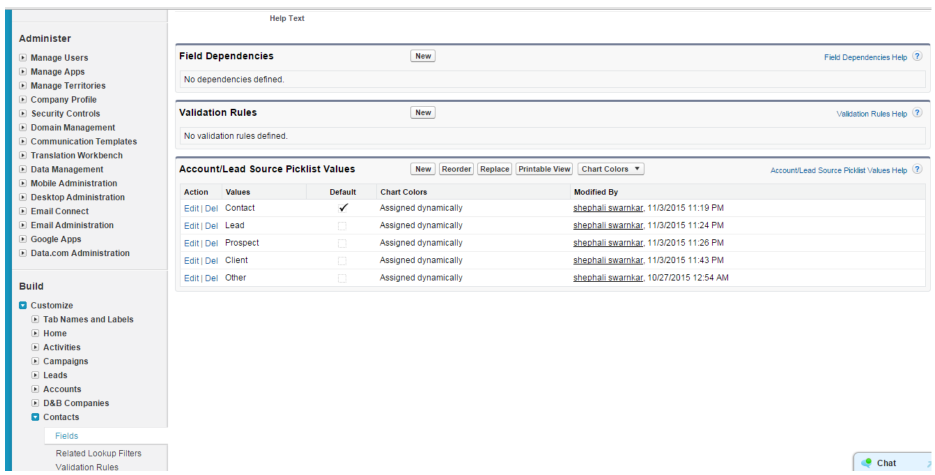
Double Click on Lead Source Field.



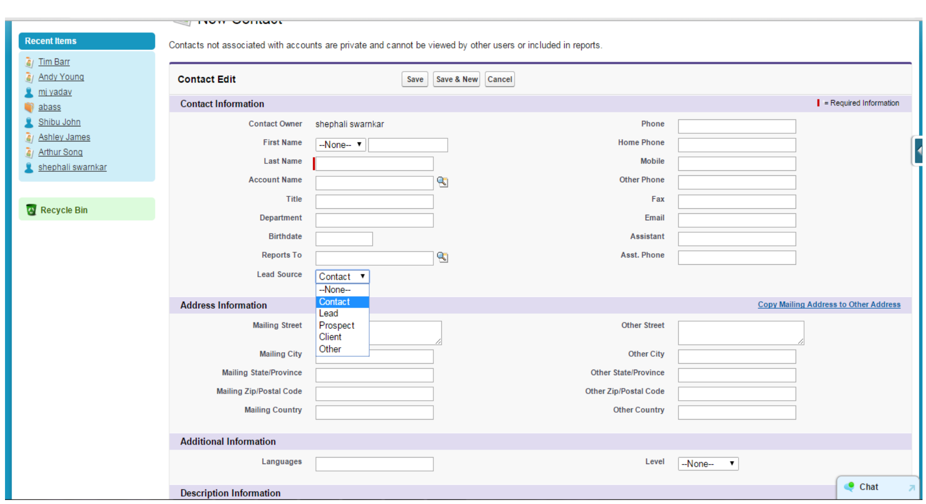
Scroll Down at bottom You will Get Account Lead Sorce Picklist Values.

Click on Edit one by one Change each Picklist Values

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



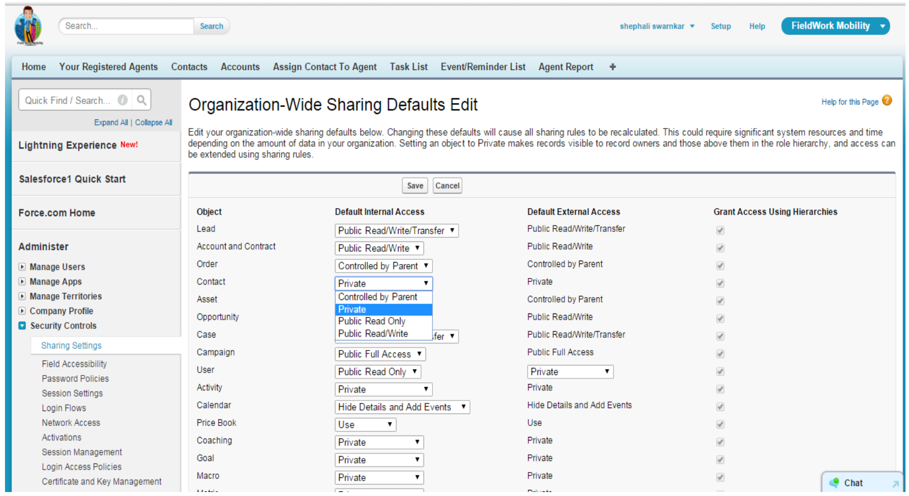
Now You Can Check the Changed Picklist Option in Contact Tab under leadsource



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'.

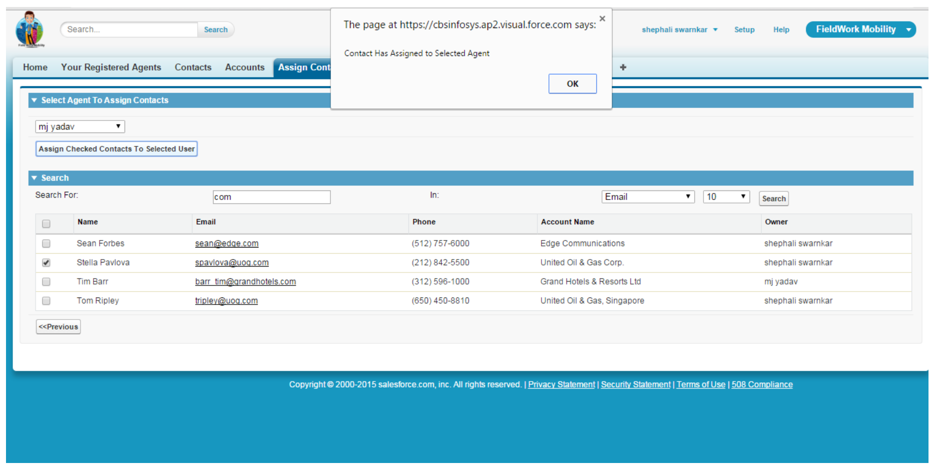
For This Click On SetUp->Security Controls->Sharing Settings->Edit

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

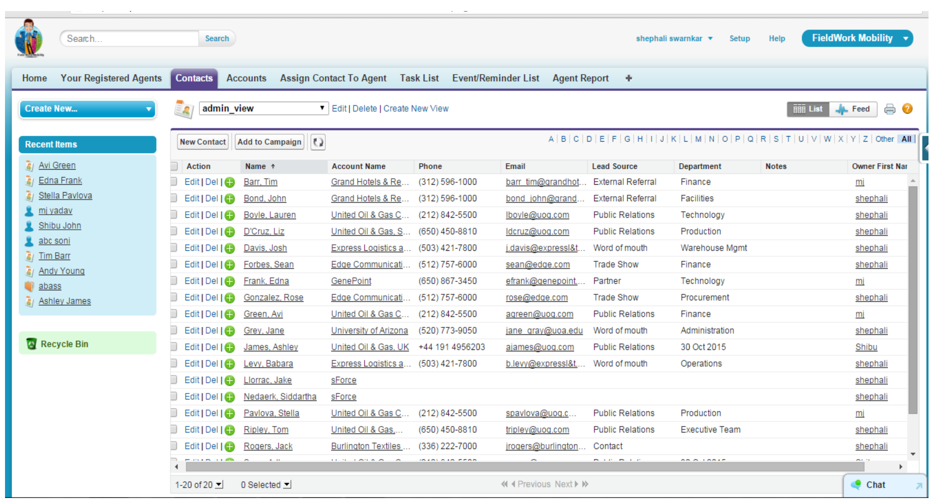


Using 'Assign Contact To Agent' Tab You Can Assign Contact To the User You Have Created.

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

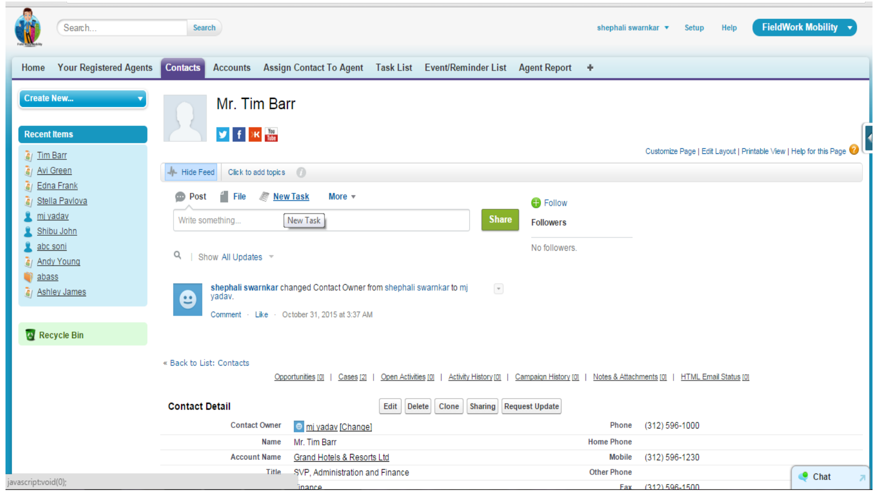


This is List View on Contact Tab here you Can See the Contact Details that which Contacts Has Been Assigned To Which User.

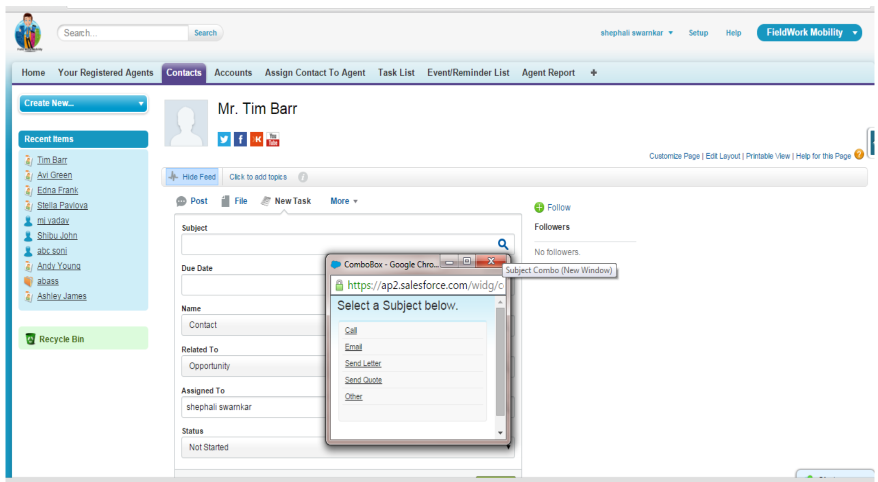


When You Click On Any Of the Contact Name You get Such Window Shown Here.

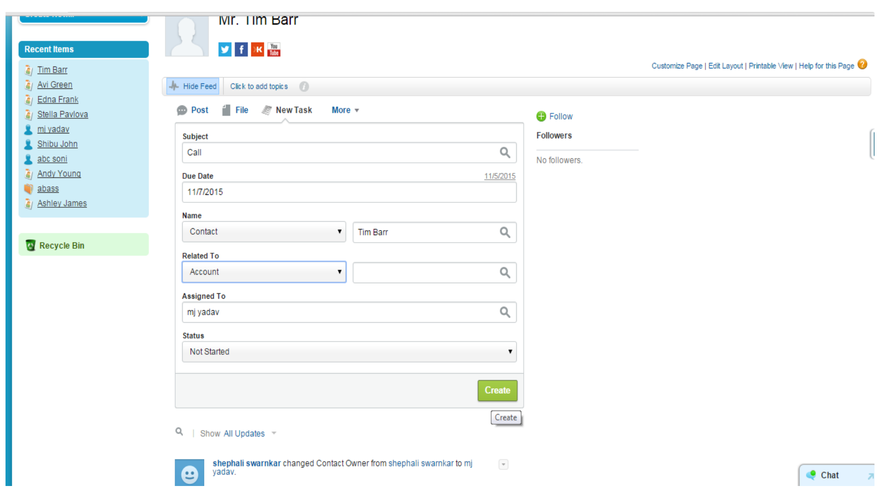
Here By Clicking on New Task You Can Assign Task Related To The Contact.



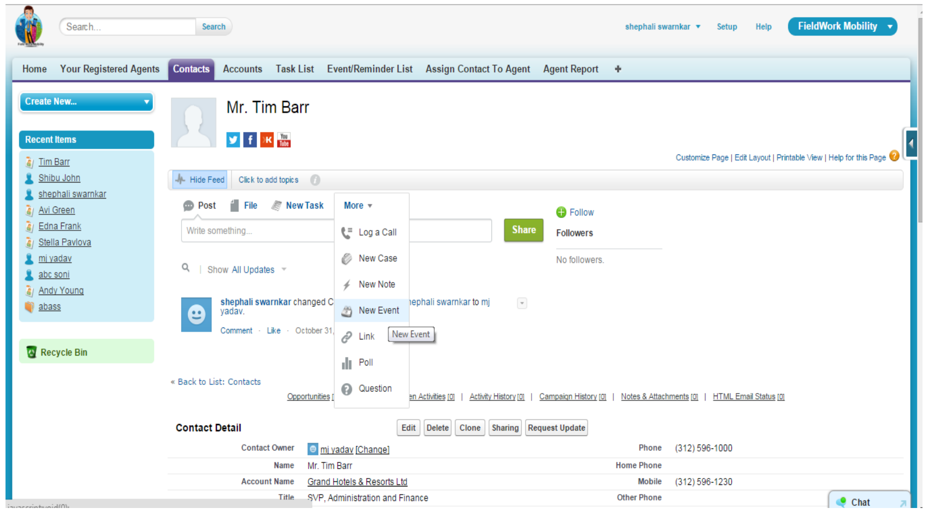
On Subject Panel by Clicking on search Icon You Can Choose The Task Subject



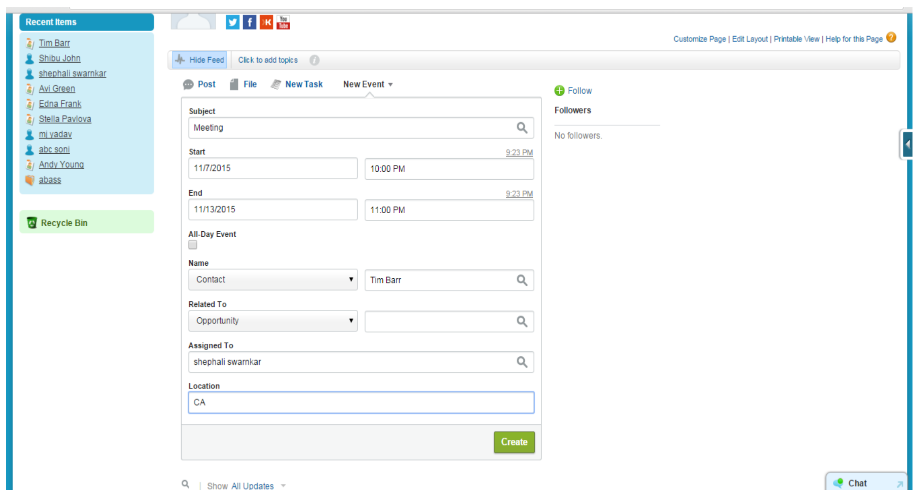
After Putting Related Information Click on Create Button At Bottom.



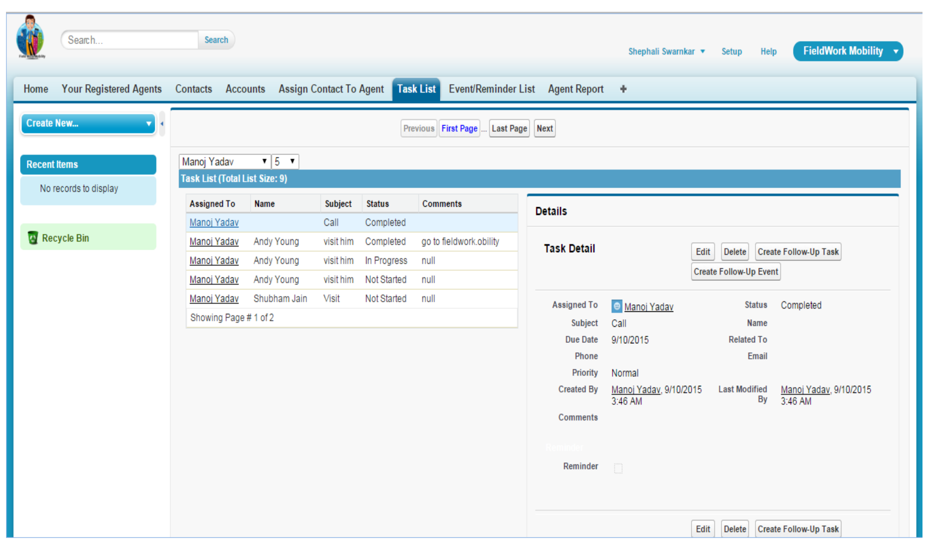
In The Same Way You can also Create Event related to each Contact.



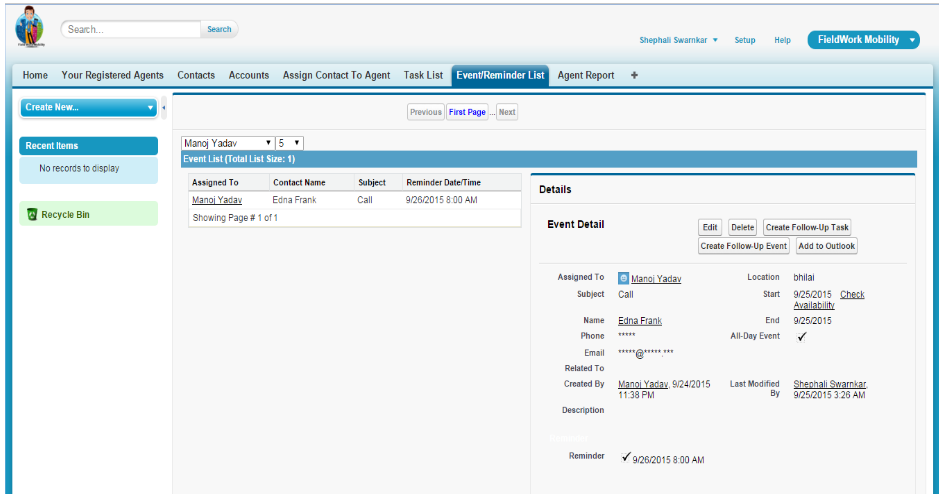
When You Click on New Event The Will Look Like Shown Here. You Can Put Related Information and Click On Create .It will Save



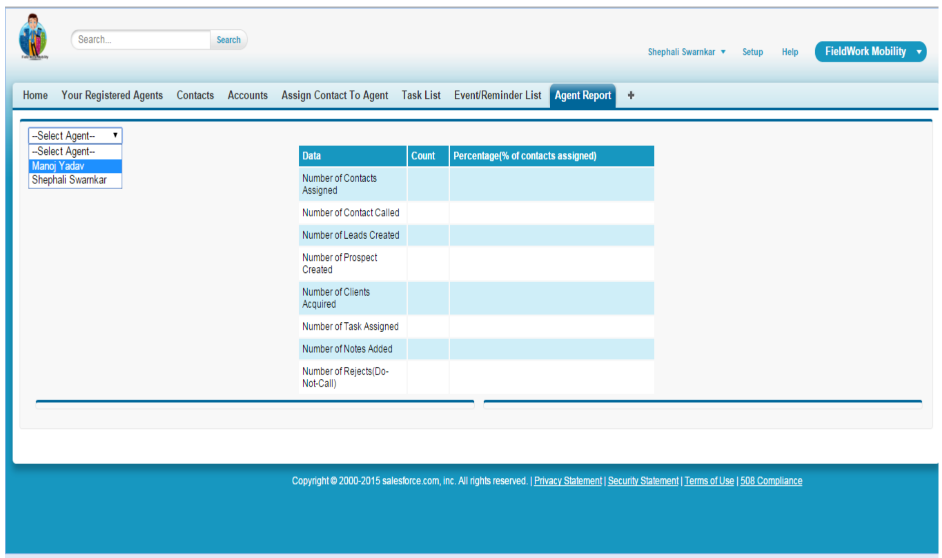
Now when you Click on Task List Tab You Check All The Assigned Task To Your User/Agents



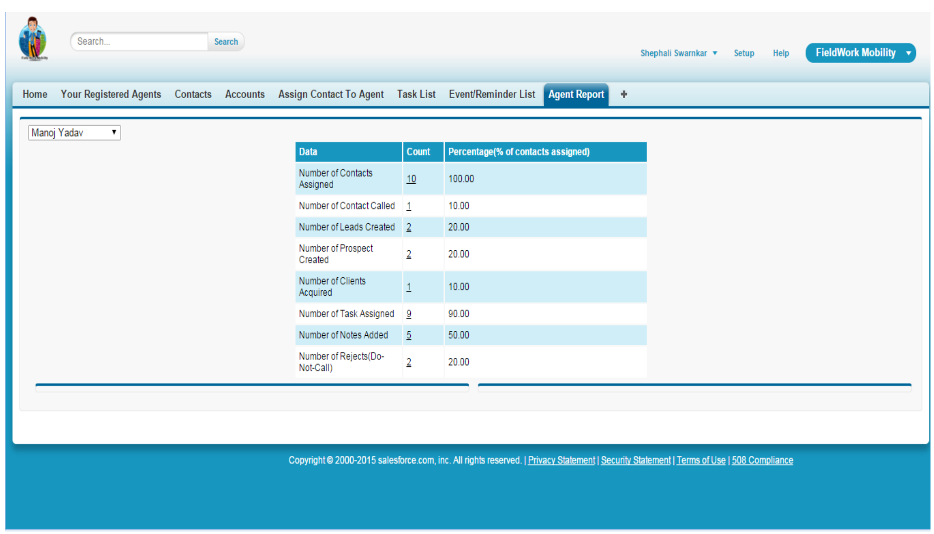
In The Even/Reminder List You Check All The Events Assigned To Or created by Your Agents.
Also perform Edit/Delete On Those Events.



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.



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.