CUSTOMIZING SALESFORCE1 USING CLICKS

OVERVIEW

This course is perfect for Salesforce administrators and application builders who want to know more about Salesforce1. This hands-on course will enable students to use clicks (not code) to customize the look and feel of Salesforce1 for their mobile user base. This is a bring-your-own-device course.

WHO SHOULD TAKE THIS COURSE?

Customizing Salesforce1 Using Clicks is ideal for Salesforce users who know how to administer Salesforce and/or build Salesforce applications declaratively on a desktop browser and now need to configure and customize the mobile experience for their users.

PREREQUISITES

- We recommend you complete ADM211 - Administration Essentials for Experienced Admins
- Students are expected to supply their own supported mobile device

DURATION
- 1 day

DELIVERY FORMAT
- Classroom

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MODULES & TOPICS

Introduction to Salesforce1
- Salesforce.com Mobile Strategy
- Salesforce1 User Setup Options
- Customizing with Clicks vs. Code

Customize Mobile Navigation
- Orientation to the Navigation Menu
- Order Navigation Menu Items
- Customize Smart Search Items
- Advanced Techniques: Create Page Tabs

Mobile-Notifications
- Enable and Configure Mobile Notifications

Customize Mobile Navigation
- Anatomy of a Page Layout
- Optimize Record Details
- Create Mobile Cards
- Create Compact Layouts

Customize Actions
- Publisher Actions Overview
- Global vs. Object-specific Quick Actions
- Start Creating a Quick Action
- Add a Quick Action to the Global Publisher Layout
- Add a Quick Action to an Object-specific Publisher Layout

Branding Salesforce1
- Changing the Loading Page and Brand Colors in Salesforce1

SalesforceA (Optional)
- SalesforceA (Optional)

Rollout and Adoption
- Reporting on Salesforce1 Usage
- Encouraging Adoption

ABOUT SALESFORCE UNIVERSITY
Salesforce University offers a comprehensive catalog of courses and certifications to help you administer, develop, and use your organization's Salesforce environment. Whether you need a customized private course for your whole team or an in-depth instructor-led classroom experience for one person, Salesforce University can help you take the next steps on your journey to success. Contact us today to learn how we can help you get the most out of your Salesforce investment.

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