

## Salesforce Advanced Admin Exam Study Guide: Topic 8 - Salesforce Mobile App and Quick Actions (10%)

### Salesforce Basics: For Advanced Admin Newbies

If you're leveling up to Advanced Admin or just starting this chapter, don't sweat it—here's a gigantic, welcoming intro to get you excited, confident, and ready to dive in.

- **What is Salesforce Advanced Admin?**
  - It's the elite level of Salesforce mastery—an online platform where you transform your org into a seamless, mobile-ready powerhouse, mastering advanced security, data, changes, analytics, custom objects, content, automation, and mobile tools, all in the cloud with no tech chaos required.
  - Picture it as your business's mobility guru—like a brilliant guide who ensures your team thrives on the go, extending your basic Admin skills to keep work flowing anywhere.
- **Why It's a Total Game-Changer:**
  - It goes beyond desktop setups—like managing users in Setup—and dives into mobile: customizing the Salesforce Mobile App and creating Quick Actions to speed up tasks. It's like upgrading from a desk phone to a smartphone—your team gets flexibility and speed, no matter where they are.
  - As an Advanced Admin, you're the mobile maestro—tuning the app and actions, like teaching a super-smart robot to help reps close deals from their phones with a tap.
- **Key Words to Start With:**
  - **Org:** Your company's Salesforce realm—like your team's high-tech mobile command center where work happens on the fly.
  - **Setup:** The control hub (top-right gear icon) where you tweak mobile—like the cockpit of your Salesforce spaceship, giving you the tools to optimize for phones.
  - **CRM:** Customer Relationship Management—the heart of Salesforce, now with advanced mobile features to keep your team connected.
- **What This Topic Is All About:**

- “Salesforce Mobile App and Quick Actions” is your deep dive into mobile optimization—customizing the app’s navigation, look, and feel, plus building Quick Actions to simplify tasks (e.g., “Log a Call”). It’s like being the designer of your org’s mobile toolkit, making it fast and user-friendly.
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## Overview

"Salesforce Mobile App and Quick Actions" (10%) is a key piece of the Advanced Admin exam—it’s about tailoring the Salesforce Mobile App and leveraging Quick Actions to boost productivity on phones and tablets. You’ll go beyond desktop workflows, ensuring enterprise teams thrive anywhere. It’s 10% of the exam—a solid chunk—because mobile access is critical for modern orgs.

## Exam Weight

- **Percentage:** 10%
- **Why It Matters:** Teams need mobility—reps on the road, managers at meetings—without it, work stalls. With 10%, it’s a must-know skill for keeping enterprise orgs agile in the real world.

## Objectives (In Super-Simple Terms)

- Learn how to customize the mobile app—like setting up “My Deals” navigation—for easy use.
  - Figure out how to create Quick Actions—like “New Task” from a Lead—to save time.
  - Get comfy managing mobile access—like “Who sees what?”—to keep it secure.
  - Understand how to test and tweak—like “Does this work on iPhone?”—for a smooth experience.
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## Structure of the Study Guide

- **Definitions:** Big, clear explanations of key terms.
- **Categories:** Topics split into digestible pieces.
- **Bullet Points:** Massive, beginner-friendly summaries with heaps of detail.
- **Tables:** Side-by-side comparisons to keep it simple.

- **Practical Scenarios:** Tons of real-world examples you can picture doing.
  - **Study Tips:** Step-by-step ways to nail this.
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## Definitions (Huge Summaries with Tons of Beginner Details)

- **Salesforce Mobile App:**
  - **What It Is:** A phone/tablet app—like “Salesforce on iPhone”—to access your org anywhere.
  - **Details:** Think of it as your org’s mobile wing—it mirrors Salesforce (e.g., Opportunities, Reports) on iOS/Android, with a slimmed-down, tap-friendly design. Advanced Admins customize it—like a portable dashboard for reps in the field.
- **Quick Action:**
  - **What It Is:** A shortcut—like “Log a Call” button—to do tasks fast.
  - **Details:** This is your speed dial—it’s a clickable action (e.g., “Create Contact”) on records or globally, cutting steps (e.g., no form hunting). It’s like a magic wand—Advanced Admins wave it to make mobile and desktop work snappy.
- **Navigation Menu:**
  - **What It Is:** The app’s menu—like “Home, Leads, Reports”—for quick access.
  - **Details:** Imagine it as your mobile roadmap—it’s the list users tap to jump around (e.g., “Opportunities”). You customize it—like picking the top 5 tools reps need most.
- **Compact Layout:**
  - **What It Is:** A mini-view—like “Name, Phone” on a Lead—for mobile highlights.
  - **Details:** This is your mobile snapshot—it shows key fields (e.g., “Account Name”) at a glance on phone screens, not the full page. It’s like a business card—Advanced Admins trim it for speed.
- **Mobile Publisher:**
  - **What It Is:** A tool to brand the app—like “Acme Salesforce”—for your org.

- **Details:** Think of it as your app painter—it lets you slap your logo and colors on the Mobile App, making it “yours” (e.g., “Acme CRM”). It’s how Advanced Admins polish the mobile vibe.
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## Categories

- **Mobile Tools:** The big areas you’ll master.
    - Customizing the Salesforce Mobile App
    - Creating Quick Actions
    - Managing Mobile Access and Security
    - Testing and Enhancing Mobile Experience
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## Detailed Breakdown (Bullet Points with Massive Beginner Summaries)

### 1. Mobile Tools

- **Customizing the Salesforce Mobile App**
  - **Summary:** Tweaking the app—like navigation or branding—to fit your team’s mobile needs.
  - **Details:**
    - This is your mobile makeover—like tuning a car for the road. You adjust the Navigation Menu, Compact Layouts, and branding to make the app intuitive for reps on the go. Advanced Admins optimize it—like ensuring 500 users tap happily.
    - **How You Set It Up:**
      - **Navigation Menu:** Setup > Apps > Mobile Apps > Salesforce > Navigation:
        - **Details:**
          - Items: Drag—like “Home,” “Opportunities,” “Reports” (max 20).
          - Order: Top = first—like “Opps” for sales focus.

- Save: Live in app.
  - **Why It's Cool:** Focused—like “Reps see deals first.” Scales—like “1K users, same menu.”
  - **Example:** “Sales Menu”—“Opportunities,” “Accounts,” “Dashboards”—reps jump to deals.
- **Compact Layout:** Setup > Object Manager > [Object] > Compact Layouts:
  - **Details:**
    - New/Edit: Like “Lead Highlights.”
    - Fields: Add—like “Name,” “Phone,” “Company” (5-10 max).
    - Assign: Set as primary—shows in app.
  - **Why It's Cool:** Quick—like “Name at a glance.” Clean—like “No clutter.”
  - **Example:** “Opportunity Compact”—“Name,” “Amount,” “Stage”—key info pops.
- **Mobile Publisher:** Setup > Apps > Mobile Apps > Salesforce > Branding:
  - **Details:**
    - Logo: Upload—like “Acme.png.”
    - Colors: Set—like “Blue #0070D2.”
    - Publish: App updates—users download “Acme Salesforce.”
  - **Why It's Cool:** Branded—like “Our app!” Pro vibe—like “Not generic.”
- **Why It's Great:** User love—like “Easy to use!” Scales—like “500 reps, custom fit.”
- **What's Tricky:** Menu limits—too many confuse. Compact fields—pick wisely (no edits). Test—iPhone vs. Android varies.

- **Real-Life Example:** “Sales App”—Menu “Opps, Accounts,” Compact “Name, Amount,” Logo “Acme”—reps rock mobile.

- **Creating Quick Actions**

- **Summary:** Building shortcuts—like “New Task” on Opportunity—to speed up mobile and desktop tasks.

- **Details:**

- This is your task booster—like a fast-forward button. Quick Actions let users create, update, or log stuff (e.g., “Call from Lead”) with one tap, cutting clicks. Advanced Admins craft them—like streamlining 1,000 daily actions.

- **How You Set It Up:** Setup > Object Manager > [Object] > Buttons, Links, and Actions:

- **Details:**

- **New Action:**

- **Type:** Like “Create a Record” (Task), “Update a Record” (Opportunity).
- **Target:** Like “Task” or “Opportunity.”
- **Fields:** Add—like “Subject,” “Due Date” (pre-fill “Call”).
- **Name:** Like “Log Call.”
- **Layout:** Add to Page Layout—shows on record.

- **Global:** Setup > Global Actions:

- **New:** Like “New Case”—anywhere in app.

- **Why It’s Cool:** Fast—like “Log in 2 secs.” Mobile-ready—like “Tap on phone.”

- **Example:** “Opportunity” > “Log Call”—Task, “Subject = Call,” “Due = Today”—call logged.

- **Why It’s Great:** Saves time—like “No form hunting!” Scales—like “1K reps, one tap.”

- **What’s Tricky:** Layout—miss it, no show. Pre-fill logic—test values. Mobile quirks—test taps.
  - **Real-Life Example:** “Lead” > “New Contact”—Quick Action, “Name,” “Phone”—contact added fast.
- **Managing Mobile Access and Security**
  - **Summary:** Controlling who uses the app—like “Sales yes, Support no”—and securing it.
  - **Details:**
    - This is your mobile gate—like a bouncer with a list. You set permissions and policies (e.g., “PIN required”) to keep the app safe and relevant. Advanced Admins lock it—like ensuring 500 users access right.
    - **How You Set It Up:**
      - **Permissions:** Setup > Profiles:
        - **Details:**
          - Profile: Like “Sales Rep”—check “Salesforce Mobile User.”
          - Permission Set: Like “Mobile Access”—add “Mobile App.”
        - **Why It’s Cool:** Granular—like “Reps only.”
      - **Security:** Setup > Security > Session Settings:
        - **Details:**
          - Mobile: “Require PIN” or “Lock after 5 mins.”
          - Offline: “Enable Offline Access” (optional).
        - **Why It’s Cool:** Safe—like “No leaks.” Flexible—like “Work offline.”
    - **Why It’s Great:** Secure—like “Data stays in.” Scales—like “1K users, tight control.”

- **What's Tricky:** Perms overlap—profile vs. set. Offline limits—test storage. Users forget PIN—reset prep.
  - **Real-Life Example:** “Sales Profile”—“Mobile User,” PIN after 10 mins—reps secure on road.
- **Testing and Enhancing Mobile Experience**
  - **Summary:** Checking mobile—like “Does this load fast?”—and tweaking for top performance.
  - **Details:**
    - This is your mobile tune-up—like road-testing a bike. You test navigation, actions, and layouts on devices (e.g., iPhone, Android) and refine them. Advanced Admins perfect it—like ensuring 500 reps love mobile.
    - **How You Do It:**
      - **Testing:**
        - **Details:**
          - App: Download Salesforce App (iOS/Android).
          - Run: Tap—like “Opportunities,” “Log Call.”
          - Check: Speed (e.g., “Loads < 3 secs”), Look (e.g., “Fields fit?”).
        - **Why It's Cool:** Catches bugs—like “Button's tiny!”
        - **Example:** Test “Compact Layout”—“Name, Amount”—fits iPhone.
      - **Enhancing:**
        - **Details:**
          - Navigation: Trim—like “5 items max.”
          - Actions: Pre-fill—like “Task = Today.”
          - Feedback: Ask—like “Reps: Too slow?”
        - **Why It's Cool:** Polished—like “Feels pro.”

- **Why It's Great:** User win—like “Love this app!” Scales—like “1K users, no complaints.”
  - **What's Tricky:** Device diffs—iOS vs. Android quirks. Data load—big lists lag. Test real—simulators miss feel.
  - **Real-Life Example:** Test “Sales App”—Menu “Opps,” Action “Log Call,” tweak “Due = Today”—reps rave.
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## Tables

**Table 1: Mobile App vs. Desktop**

What's Different	Mobile App	Desktop
<b>Access</b>	Phone/tablet	Browser
<b>Layout</b>	Compact	Full page
<b>Example</b>	“Tap Opp Name”	“Edit Opp form”

**Table 2: Object vs. Global Quick Actions**

What's Different	Object Quick Action	Global Quick Action
<b>Scope</b>	One record (e.g., Lead)	Anywhere in app
<b>Placement</b>	Record page	Global menu
<b>Example</b>	“Log Call on Opp”	“New Case anywhere”

**Table 3: Navigation vs. Compact Layout**

What's Different	Navigation Menu	Compact Layout
<b>Purpose</b>	App jumping	Record glance
<b>Setup</b>	Menu items	Key fields
<b>Example</b>	“Opps, Reports”	“Name, Phone”

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## Practical Scenarios

## 1. Mobile Navigation:

- **Need:** Reps need deals first.
- **Solution:** Navigation—“Opportunities,” “Accounts,” “Tasks”—deals top tap.

## 2. Quick Action:

- **Need:** Log calls fast.
- **Solution:** “Opportunity” > “Log Call”—Task, “Subject = Call”—one-tap log.

## 3. Secure Access:

- **Need:** Sales-only mobile.
- **Solution:** “Sales Profile”—“Mobile User,” PIN 5 mins—locked for reps.

## 4. Compact View:

- **Need:** Lead highlights.
- **Solution:** Compact—“Name,” “Company,” “Phone”—key info pops.

## 5. Test App:

- **Need:** Smooth iPhone use.
- **Solution:** Test—“Opps load,” “Log Call works”—tweak “Menu to 5”—perfect.

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## Study Tips

- **Hands-On:** Free org ([developer.salesforce.com](https://developer.salesforce.com))—set up mobile, add an action, test on phone.
- **Start Simple:** Trailhead’s “Salesforce Mobile Basics” and “Quick Actions”—free, with videos and tasks.
- **Focus:** Master Mobile (navigation, layout), Quick Actions (create), Access (security), Testing (tweak).
- **Practice:** “Set mobile menu?” or “Build an action?”—exam drills.
- **Beginner Boost:** Watch “Salesforce Mobile App Intro” on YouTube; try one tweak daily—like menu, then action.

- **Time:** Spend 10%—5 hours of 50—split: 1.5 on Mobile App, 1.5 on Quick Actions, 1 on Access, 1 on Testing.