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**APPASAMY ASSOCIATES  
PVT. LTD.**

**SALES USER MANUAL  
FOR MOBILE**

**Installing the Mobile Version to  
Accessing the Mobile App**

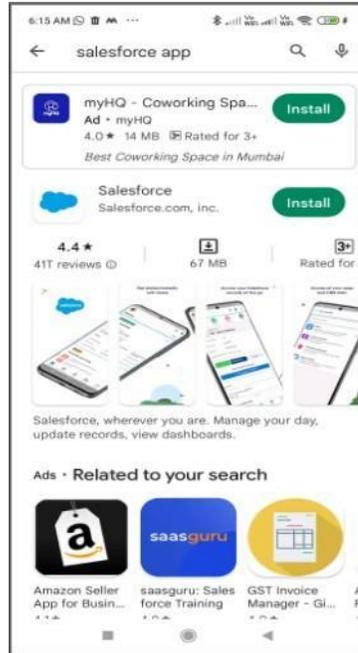
**07-08-2023**

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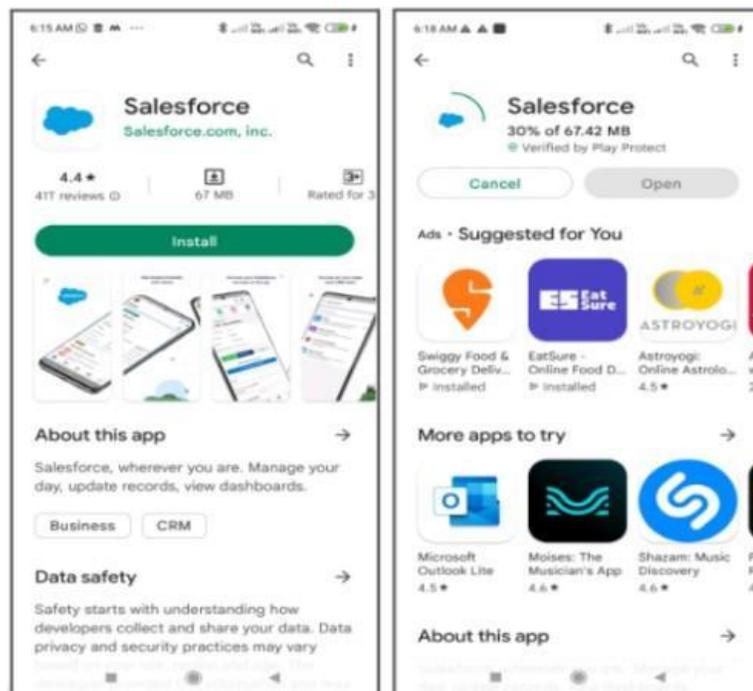
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## 1. Install the Mobile Version:

- a. To Download the Salesforce Mobile Application follow the steps below:
  - i. Open the Play Store App and Search for Salesforce App.

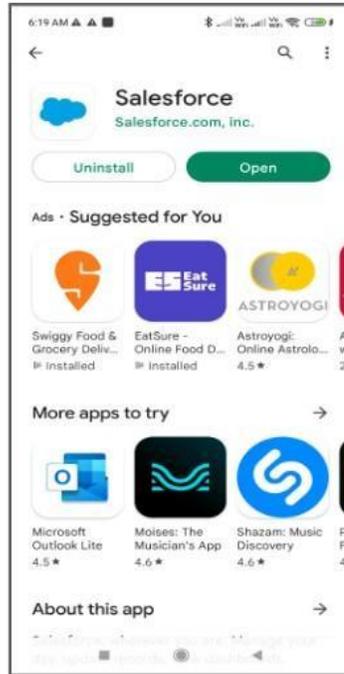


- ii. Click on the Install button to download the Application

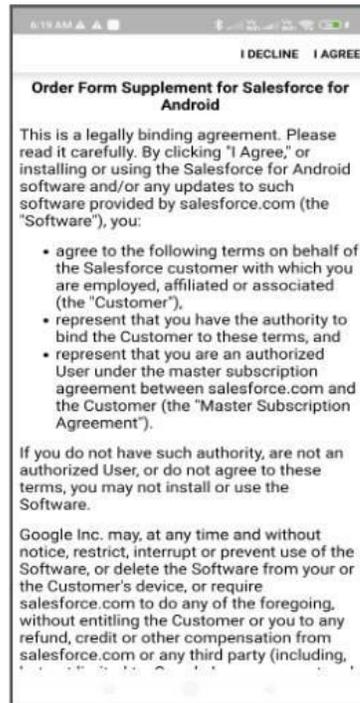


## 2. Open the Installed App:

- a. Once the App is installed follow the steps below:
  - i. Click on Open to open the installed salesforce app.

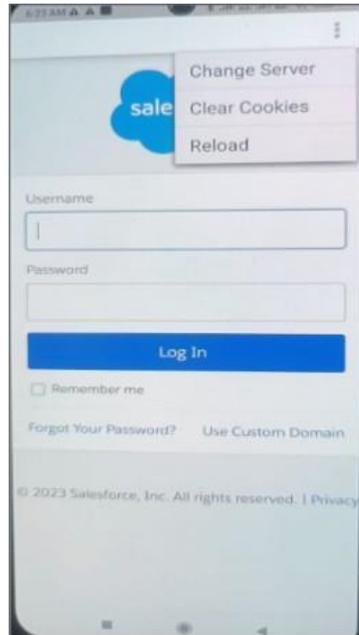


- ii. Read the Order form Supplement Terms and Condition and Click on I agree.



### 3. Login To Salesforce Mobile App:

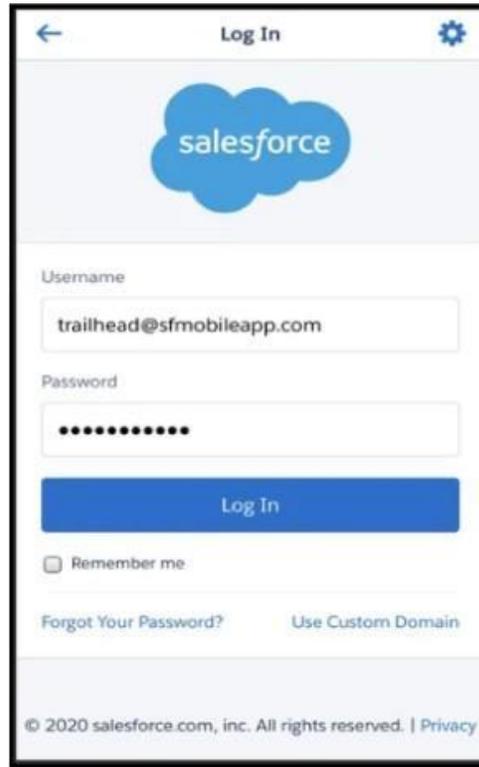
1. Choose the server you want to login into, by clicking the 3 dots on the right hand side top corner and click Change server.



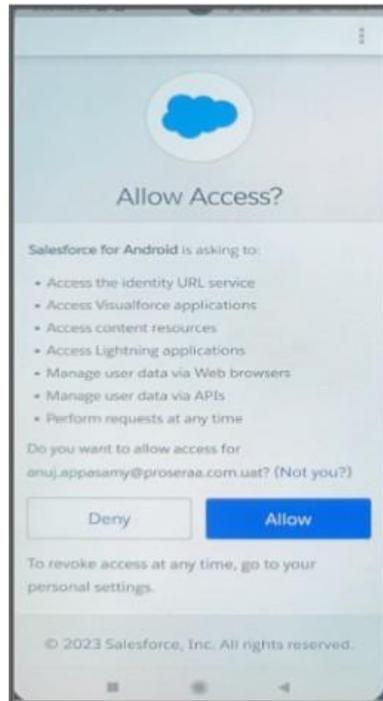
2. Choose the server to Production, and select the server to Log In.



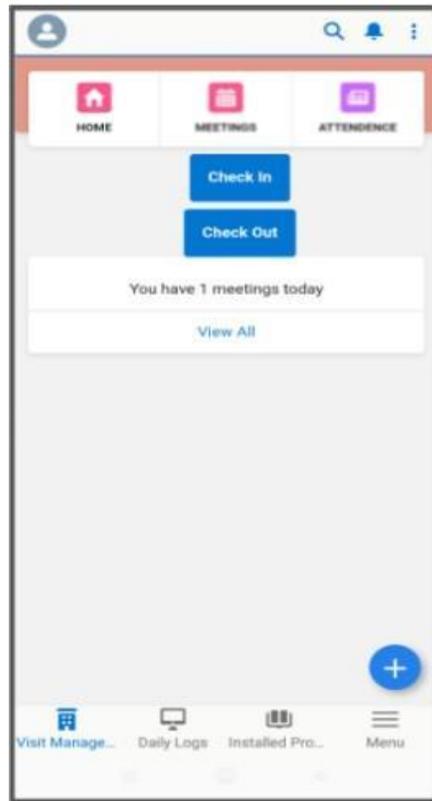
3. Use your credentials to Login in to the Salesforce Mobile App.



4. Once Logged in Click on Allow button to Allow the Access of Salesforce in Android.

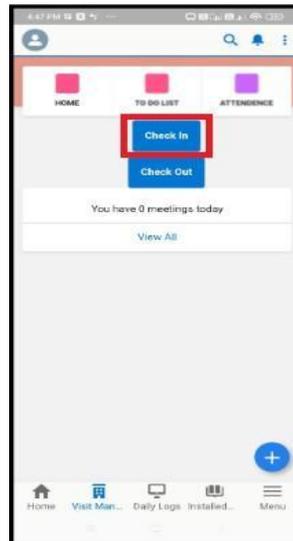


5. Successfully Logged into Salesforce App.

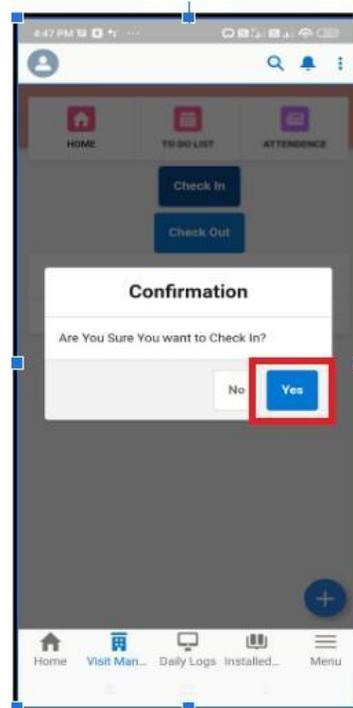


#### 4. Check in through Visit Management:

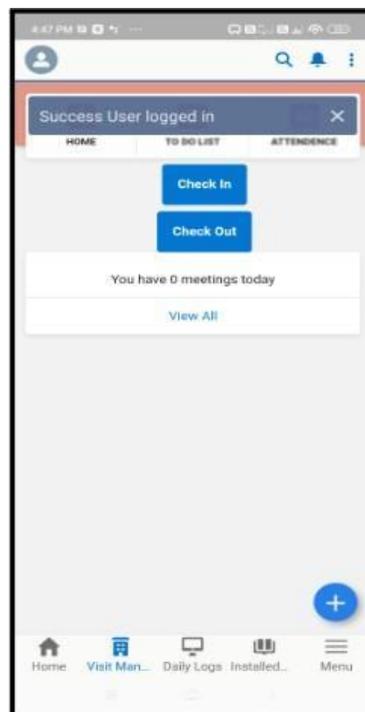
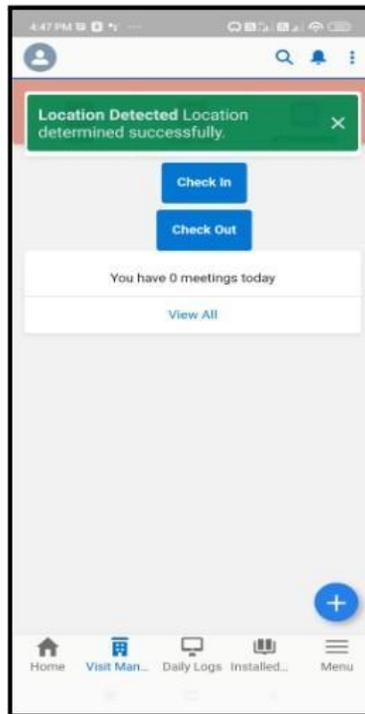
1. In Salesforce mobile, you will be directed to the Visit Management Page, where the agent or user can Log In and Log Out, and also see the total meeting scheduled or Attendance or To Do List.
2. Click on Check In button



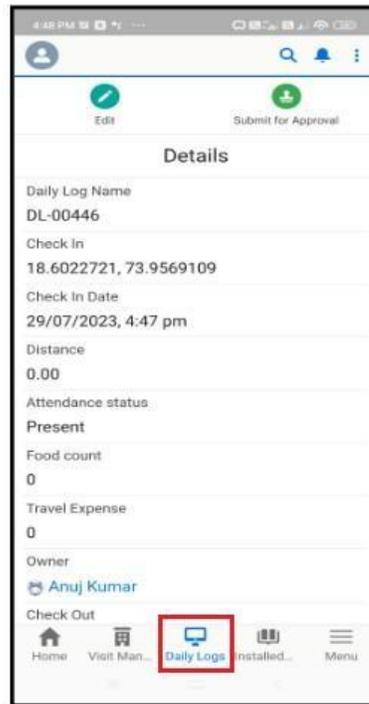
3. Once clicked, a Confirmation dialog box appears asking “Are You sure You want to Check In”, YES/NO, click on yes to log in the attendance and to create a daily log.



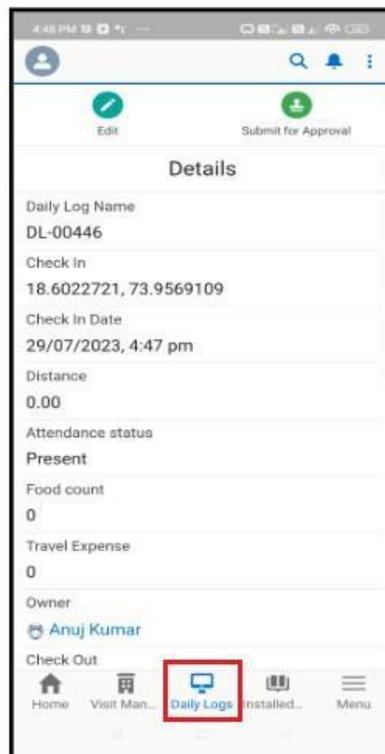
4. If the Location is not enabled, then it prompts to enable the location, if already enabled it automatically detects the location and prompts the user.



5. Once Checked in Check the daily log created by navigating to the Daily log section through Navbar.

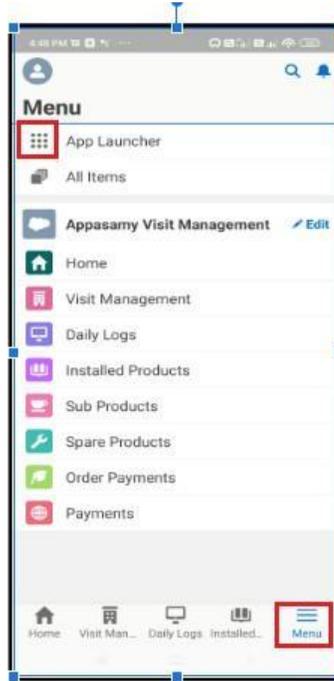


6. The user can see the time and date he has logged in.
7. The details consist of Check in and Check out Latitude and longitude, Check out Date, etc.



## 5. App Launcher and Accessing the Mobile App:

1. If you don't see the Appasamy Associates application, launch the App Launcher by clicking the Menu Icon and then the App Launcher Icon (9 dots) in the top left corner of the navigation bar. To see all of your applications and items, click App Launcher and then select the Appasamy Associates Sales app. For reference, see the image below.



2. You will see the following in the **Appasamy Associates Sales App**.
  - a. Home
  - b. Leads
  - c. Lead Line Items
  - d. Accounts
  - e. Opportunities
  - f. Quotes
  - g. Orders
  - h. Order payments
  - i. Payments
  - j. Reports
  - k. Dashboards
  - l. Visit Management
  - m. Daily Logs

