



## 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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#### 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.

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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.

1213M 0 0	State and the state of the state
	1
	Change Server
sale	Clear Cookies
	Reload
Usemame	
1	
Password	
Loj	g In
Remember me	
Forgot Your Password?	Use Custom Domain
© 2023 Salesforce, Inc. A	all rights reserved.   Privacy

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.

+	Log	In	\$
	sales	force	
Usemame			
trailhead	@sfmobileap	op.com	
Password			
	••••		
	Log	In	
Remember	er me		
Forgot Your F	Password?	Use Custom D	omain
© 2020 salesfo	orce.com, inc.	All rights reserved.	Privacy

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







5. Successfully Logged into Salesforce App.

HOME		MEETINGS	ATTENDENCE
		Check In Check Out	
	You hav	ve 1 meetings t View All	oday





#### 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.

4.47 PM 10 🖬 🕶 🚥	0818193
0	۹ 🖡 :
Location Detected determined succe	Location ×
	Check In
	Check Out
You have 0	meetings today
3	/iew All
	•
Home Visit Man_ Di	ily Logs Installed., Menu







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

4:48 PM 10 0 *r ····	08.000
0	Q 🐥 I
Edit	Submit for Approval
Det	tails
Daily Log Name DL-00446	
Check In 18.6022721, 73.95691	109
Check in Date 29/07/2023, 4:47 pm	
Distance 0.00	
Attendance status Present	
Food count 0	
Travel Expense O	
Owner 😁 Anuj Kumar	
Check Out	Logs Installed. Menu

- 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.

4.48 PM 18 🖸 🐮 …	
8	Q 🐥 :
Edit	Submit for Approval
Det	ails
Daily Log Name DL-00446	
Check in 18.6022721, 73.95691	09
Check In Date 29/07/2023, 4:47 pm	
Distance 0.00	
Attendance status Present	
Food count 0	
Travel Expense 0	
Owner 😁 Anuj Kumar	
Check Out	Logs Installed. Menu





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

 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.

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- 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
  - I. Visit Management
  - m. Daily Logs

