



AppsME Setup Guide

Salesforce ver.

Ver.1.1

Revision History

Ver.	Date	Content
1.0	2019/07/26	New issue

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How to use this manual

This manual is a setup guide of “AppsME” (Salesforce ver.) provided by OPRO Co., Ltd.

Our purpose is for you to understand the procedure to configure operating environment to collaborate AppsME with Salesforce and refer to / edit information on Salesforce from a mobile terminal.

In order to freely customize input layout after configuring environment, please refer to “AppsME designer guide (Salesforce ver.)”.

Conventions used in this manual

The following conventions are used in this manual.

Convention	Content
Note	Describes notes on operation
Point	Describes tips on operation.
Ref.	Describes a reference in this manual.
[]	Used when describing button names, tab names, keys on keyboard, etc.
「 」	Used when describing system names, menu names, item names, references, etc.

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1. Introduction

Here, product concept and operational notes/restrictions of AppsME (Salesforce ver.) are explained.

1.1 Product concept

AppsME's product concepts are as follows.

- You can input into Salesforce from a mobile terminal.
- You can input even if a mobile terminal is in offline.
- According to the authority of referring user, an administrator can configure display items.
(Ex: Part timers can view a part of items while an administrator can view all items)
- It has a handwriting sign function.
(Ex: After a customer give you a sign of work completion, you can upload it to Salesforce)
- You can upload image files such as photos to Salesforce.
- It has a custom layout function.
An administrator can lay out a report with a report designer so that it is easy for staff to use.
You can modify its appearance unique to Salesforce, to an existing report layout that users are familiar with.

1.2 Notes

Notes on operating AppsME with a mobile terminal are as follows.

- You cannot upload images over the disk capacity of Salesforce under contract.
- If you log out of AppsME while "an unsaved record" existing, it will be erased.

1.3 Restrictions

The OS and its version which can install AppsME are as follows.

Mobile terminal OS	Compatible version	Remarks
iOS	iOS 11.0 or later	Smart phone / Tablet
Android	Android 7.0 or later	Smart phone / Tablet
Windows10	Windows10	Smart phone / Tablet / Windows PC

2. AppsME Connector Config

Setting procedure of 「AppsME Connector」, which is for collaborating AppsME with Salesforce, will be explained.

2.1 Install AppsME Connector

Install 「AppsME Connector」, which is for collaborating AppsME with Salesforce.

1. Access to this URL and click [Get It Now] button.

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000E1kjOUAR>

The screenshot displays the Salesforce AppExchange listing for 'AppsME Connector'. The page header includes the Salesforce logo, a search bar, and navigation links. The main content area features a large video player with a slide that reads 'Speed up the site report' and 'Support iOS Android'. Below the video, there are two green circles with text: 'View and save when offline' and 'Customize to the spec of paper report'. To the right of the video, the price is listed as '\$30 USD per company per month' with a 'Get It Now' button. Below the price, there is a table with columns for 'RATING', 'LISTED ON', and 'LATEST RELEASE'. The rating is '★★★★★ (0)', listed on '9/5/2016', and latest release is '6/21/2019'. Below the table, there is a description of the app's features and a note about the license fee.

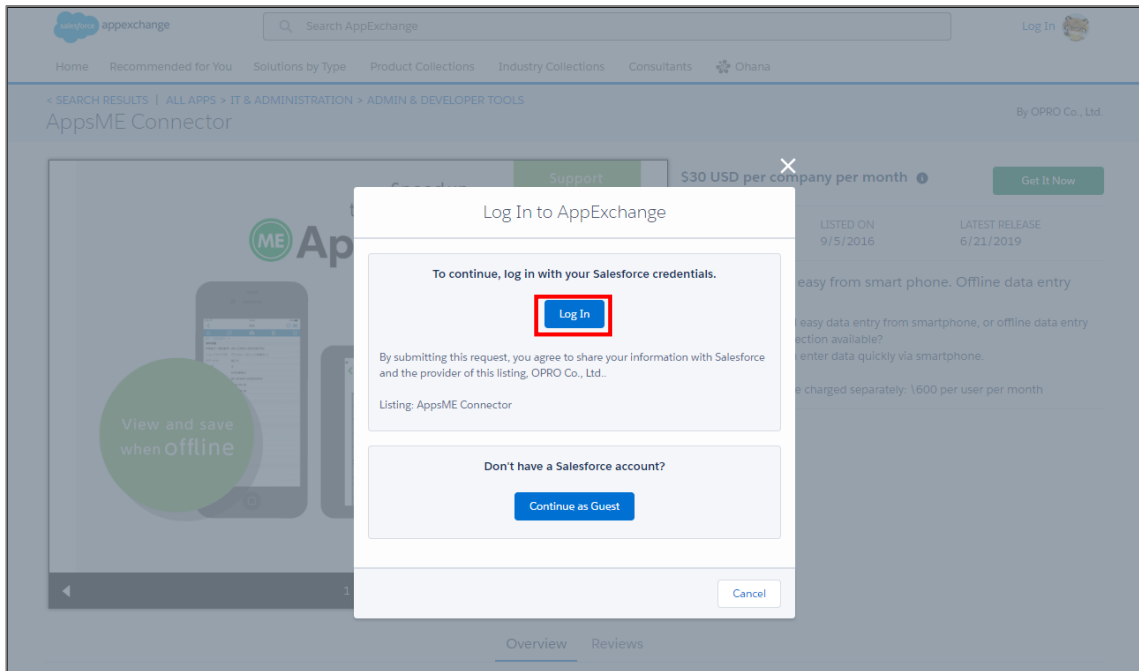
RATING	LISTED ON	LATEST RELEASE
★★★★★ (0)	9/5/2016	6/21/2019

Enter speedy and easy from smart phone. Offline data entry supported.
Have you ever desired easy data entry from smartphone, or offline data entry when there's no connection available?
With AppsME you can enter data quickly via smartphone.
User license fee will be charged separately: 1600 per user per month

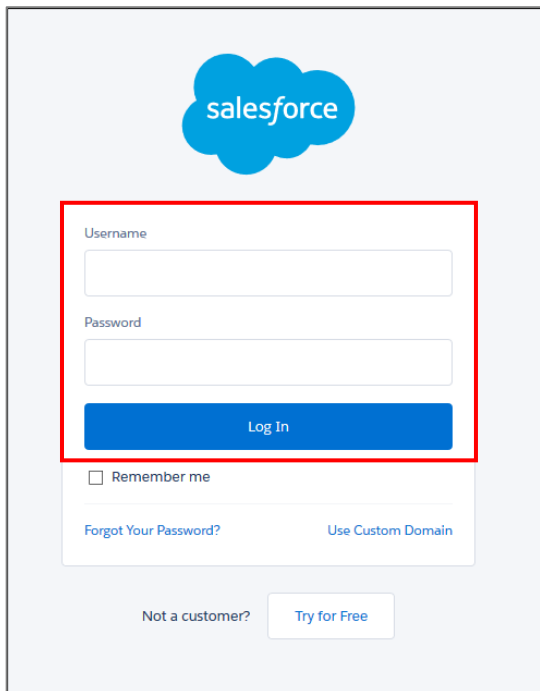
Point

If link destination doesn't appear, search 「AppsME」 in AppExchange site.

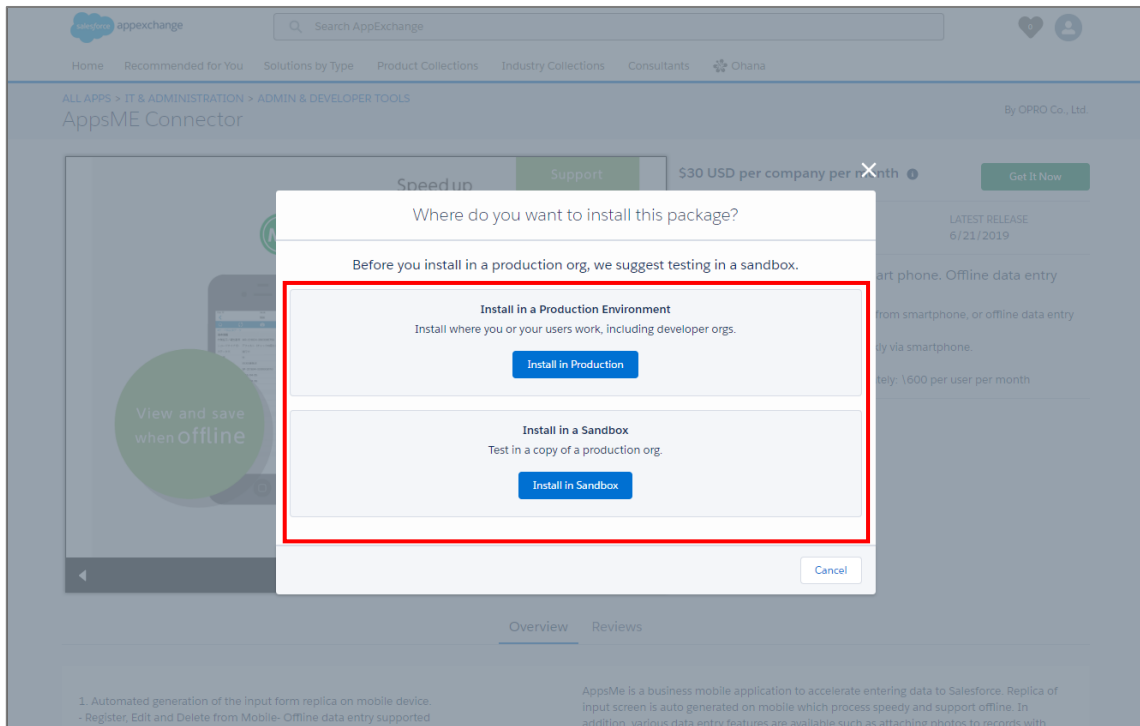
2. 「Log in to AppExchange」 screen will be displayed. Click [Log In].



3. Enter the name of the user who has administrative privileges on the organization to which the app will be installed and his/her password, then click [Log In] button.

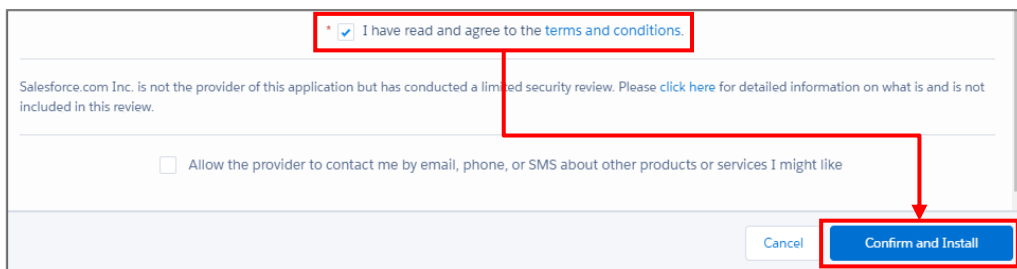


4. 「Where do you want to install this package?」 screen will be displayed. Select the organization to which you install the package.

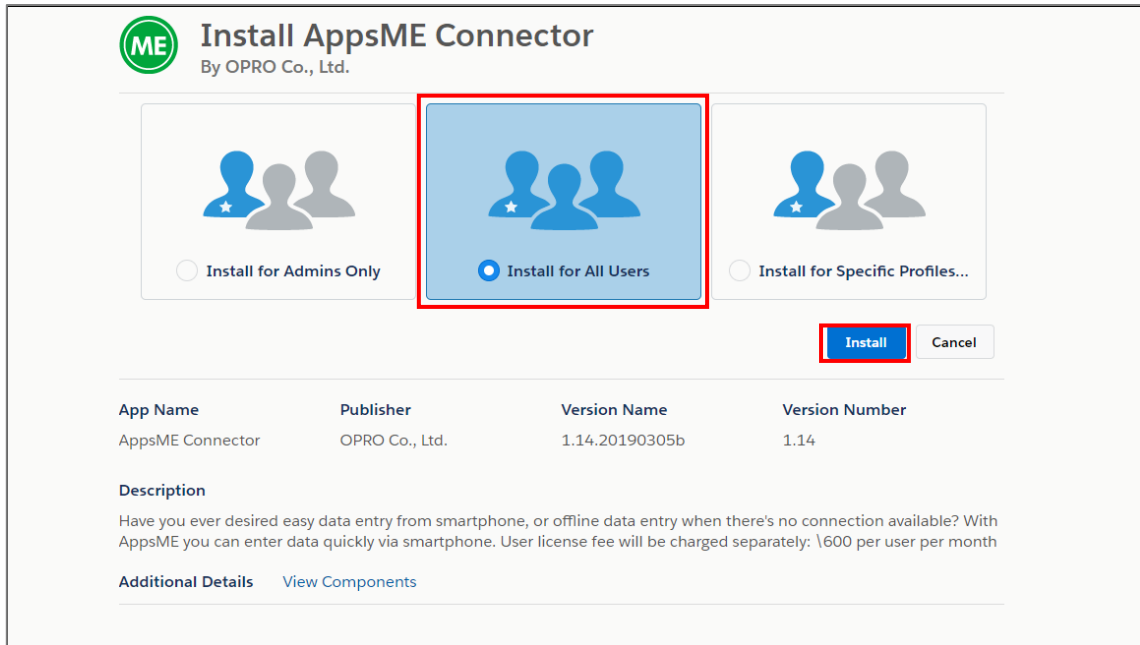


Point It is recommended that you test in Sandbox before installing to production environment.

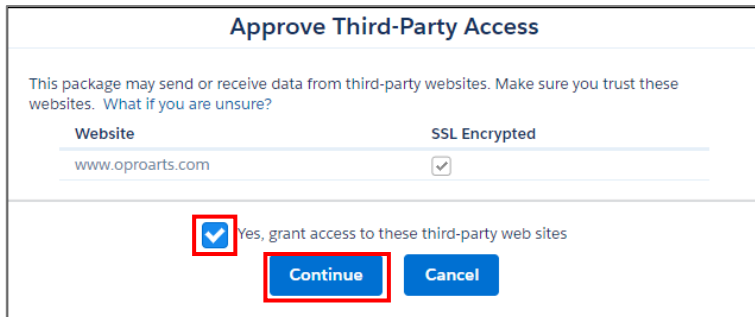
5. Read contract conditions and check 「I have read and agree to the terms and conditions」. Click [Confirm and Install] button.



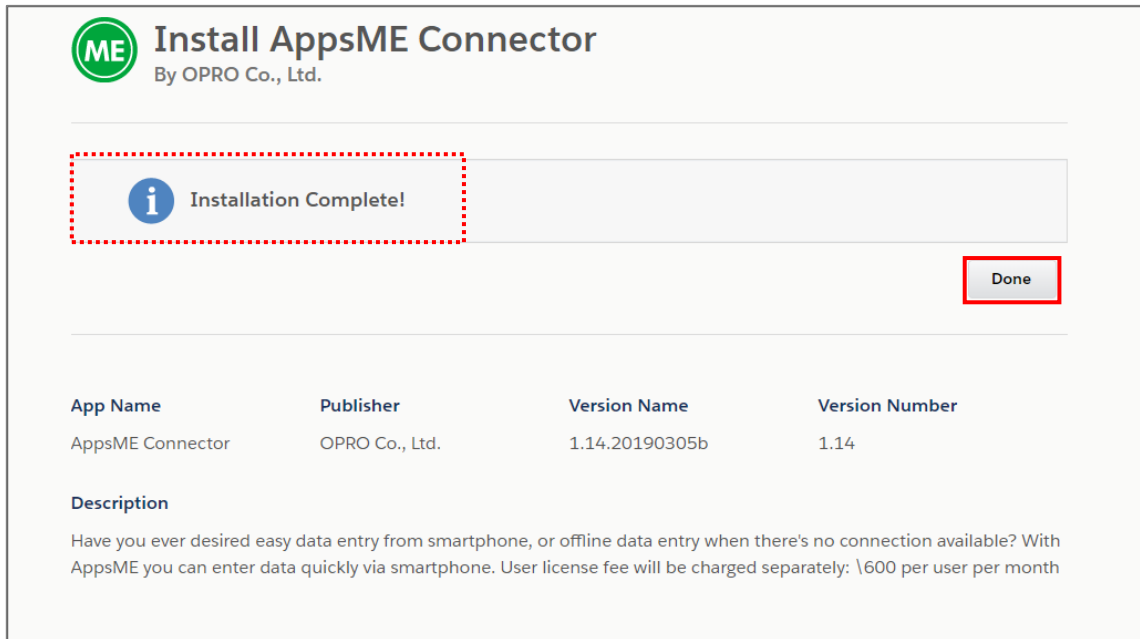
6. 「Install AppsME Connector」 screen will be displayed.
Select the users to which you install it and click [Install] button.



7. 「Approve Third-Party Access」 screen will be displayed.
Check 「Yes, grant access to these third-parties web sites」 and click [Continue] button.



- After you finish installing, a message 「Installation Complete!」 will be displayed. Click [Done] button.

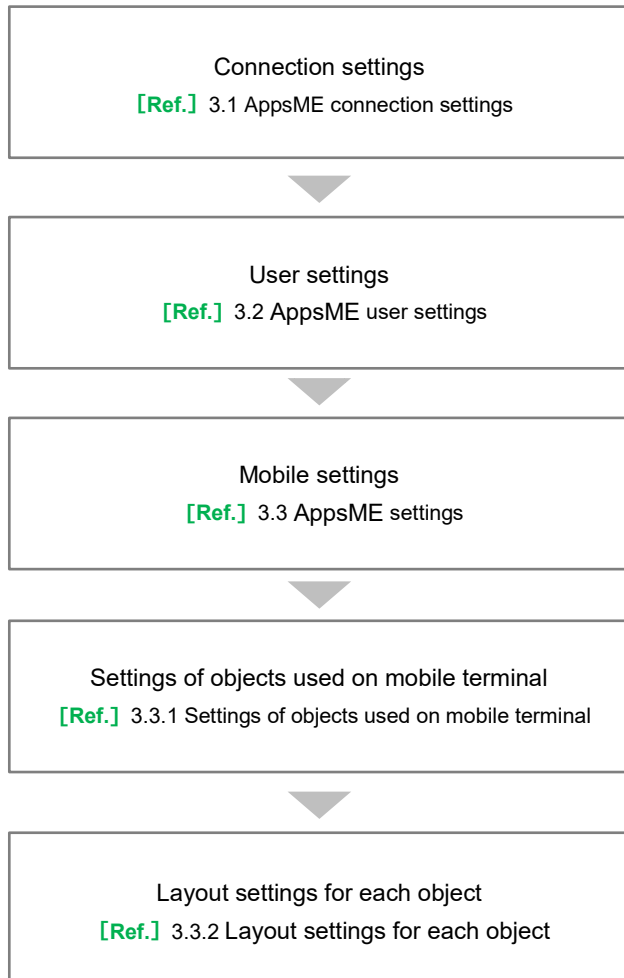


Point Installation completion will also be notified by email.

3. Config on Salesforce

Configure AppsME on Salesforce side.
The procedure of connection settings, user settings, mobile settings will be explained.

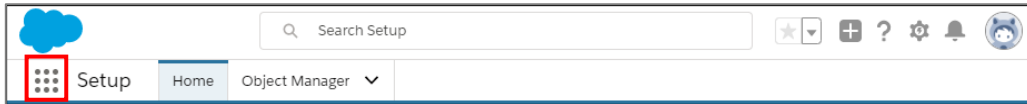
The procedure in chapter 3 is as follows.



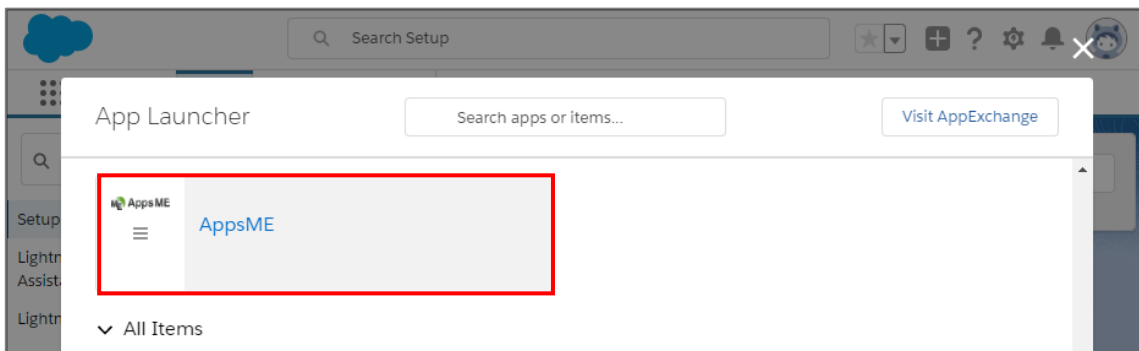
3.1 AppsME connection settings

Configure Salesforce side of AppsME. Initially, launch AppsME and do connection settings.

1. Log in to Salesforce.
2. Click [Application launcher] icon.

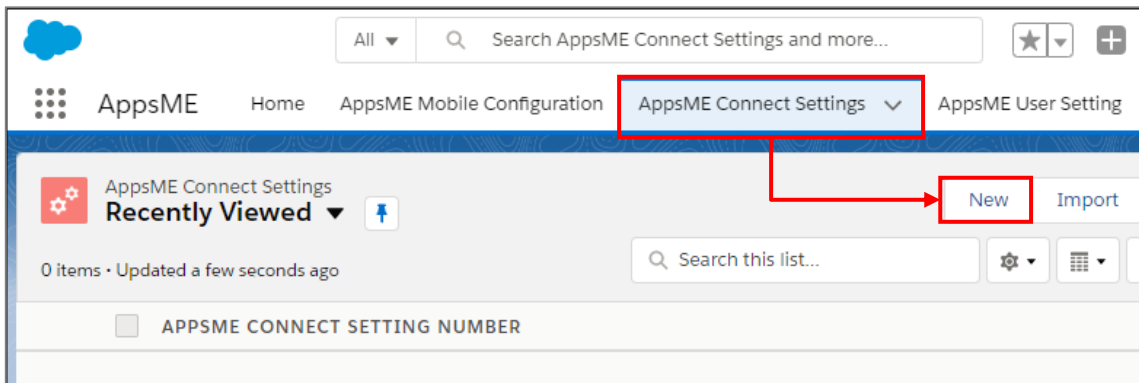


3. Scroll down application launcher and click [AppsME] link.



Point In Salesforce Classic, you can select from an application menu on upper right corner.

4. Click [AppsME Connect Settings] tab and click [New].



- 5. 「New connection settings」 screen will be displayed.
Enter OPROARTS authentication information 「CID」「UID」「UPW」, and click [Save] button.

Edit Connection Settings
New connection settings

information

CID

UID

UPW

Created By

Point

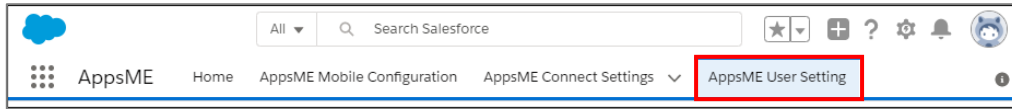
Confirm a text file sent from OPRO about OPROARTS authentication information.

```
OPROARTS Auth Information (Production) 2016/08/30 OPRO Co., Ltd.  
OPRO Co., Ltd.  
[Auth Information (Production)]  
CID: XXXXXXXXXXXXXXXX  
* For AppsME  
UID:          UPW:  
YYYYYYYYYYYY ZZZZZZZZZZZZ  
That's all.
```

3.2 AppsME user settings

Set users who use AppsME.

1. Click [AppsME User Setting] tab.



2. 「AppsME User setting」 screen will be displayed.
Check 「Active」 next to the user who uses AppsME, click [Save] button.

AppsME User setting

Check users who use AppsME and click save

Search

Full Name Role

Profile

<input type="checkbox"/> Active	Full Name ▲	Active	Role	Profile
<input type="checkbox"/>	Chatter Expert	✓		Chatter Free User
<input type="checkbox"/>	Test Installation	✓		System Administrator
<input type="checkbox"/>	User Integration	✓		Analytics Cloud Integration User
<input type="checkbox"/>	User Security	✓		Analytics Cloud Security User

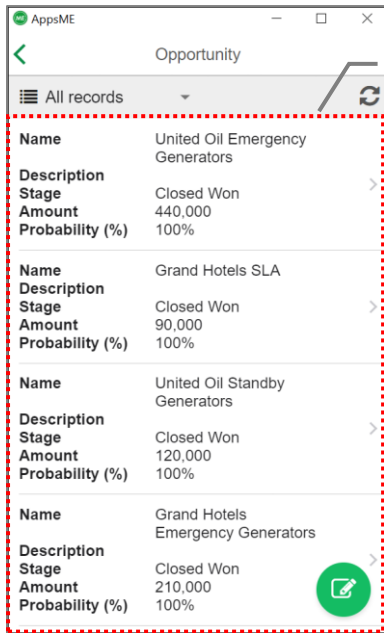
Note You can't activate more users than the number of licenses you contracted.

3.3 AppsME mobile settings

AppsME can automatically generate a screen on mobile side just by setting objects and layout used in a mobile terminal.

Here, the procedure is explained using a case as an example where you refer to the items in Salesforce [Opportunity] object.

■ Mobile terminal : Record list screen

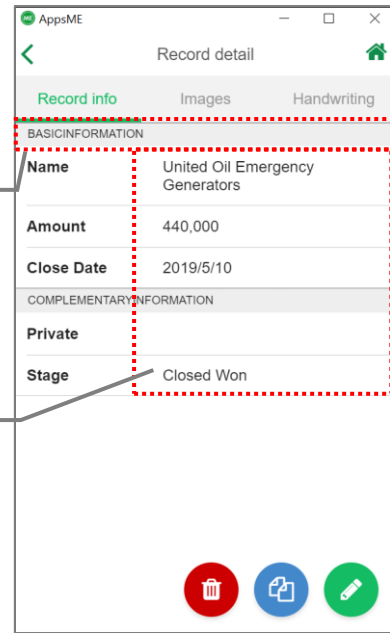


Display items can be specified.

Sections can be specified.

Edit/Reference target items can be specified.

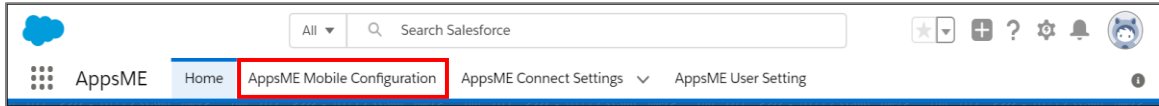
■ Mobile terminal : Record detail screen



3.3.1 Settings of objects used on mobile terminal

Initially, set the objects you use on a mobile terminal.

1. Click [AppsME Mobile Configuration] tab.



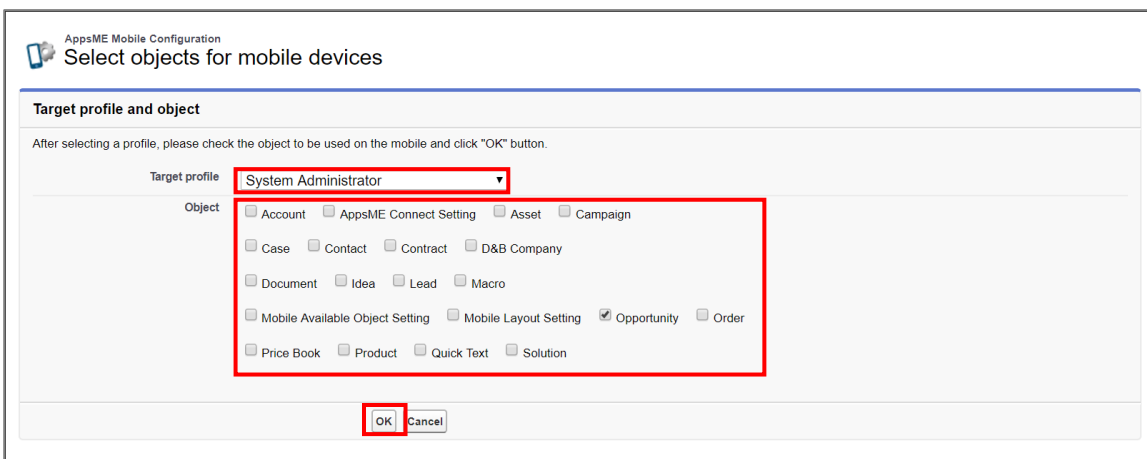
2. 「AppsME Mobile Configuration」 screen will be displayed. Click [Move] button of 「Objects for mobile devices」.



3. 「Objects for mobile devices」 screen will be displayed. Click [New] button.



4. 「Select objects for mobile devices」 screen will be displayed. After selecting 「Target profile」, check the objects you use on a mobile terminal, then click [OK] button. (Here, 「Opportunity」 is checked)



- 「Field to be displayed in the record list」 will be displayed.
Add items to be displayed in record list on a mobile terminal, click [Save] button.

Field to be displayed in the record list Save

Please add the item to be displayed in the record list of AppsME.

Opportunity Not Cached In Mobile

Sort Order: 1

Available Fields	Selected Fields
Private	Name
Expected Amount	Description
Quantity	Stage
Close Date	Amount
Opportunity Type	Probability (%)
Next Step	
Lead Source	
Closed	
Won	

Save

- The objects you use on a mobile terminal are set.

AppsME Mobile Configuration
Objects for mobile devices

Search

Location:

Search Clear

New Back

Action	Location	Available Object Label
Edit Delete	System Administrator	Opportunity

1-1 / 1 Page 1 / 1

New Back

Point

If you add settings to another profile, click [New] button and repeat step 3 ~ 5 above.

New Back

Action	Location	Available Object Label
Edit Delete	System Administrator	Opportunity

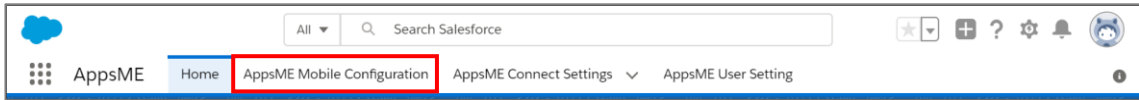
1-1 / 1

New Back

3.3.2 Layout settings for each object

Then, set the layout for each object.

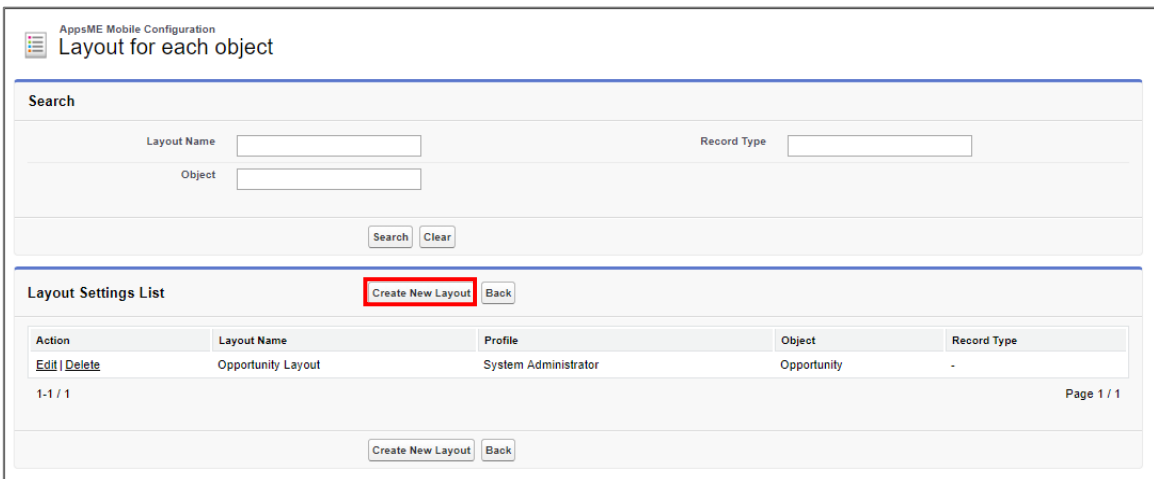
1. Click [AppsME Mobile Configuration] tab.



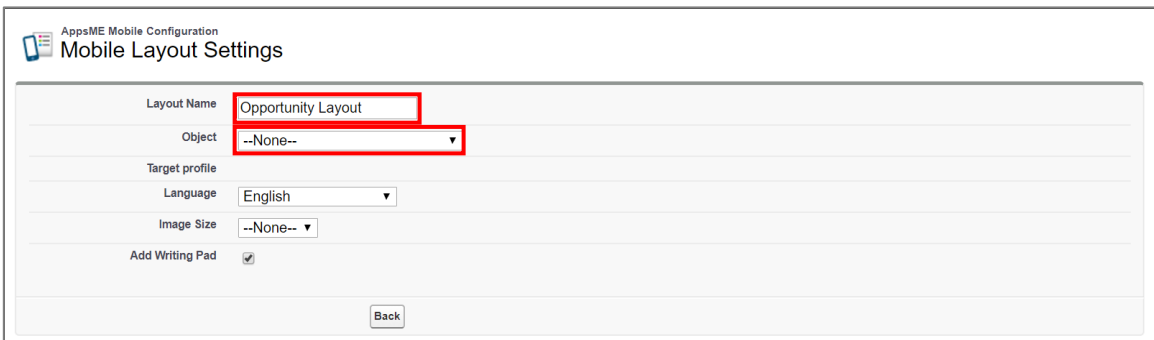
2. 「AppsME Mobile Conifuration」 screen will be displayed.
Click [Move] button of 「Layout for each object」.



3. 「Layout for each object」 screen will be displayed.
Click [Create New Layout] button.



4. Enter 「Layout name」 of the layout to be newly created, and select 「Object」 you want to refer to on a mobile terminal.



5. Check the profile allowed to refer to in 「Target profile」.

AppsME Mobile Configuration
Mobile Layout Settings

Layout Name: Opportunity Layout

Object: Opportunity

Relation 1: --None--

Relation 2: --None--

Relation 3: --None--

Relation 4: --None--

Relation 5: --None--

Target profile: Custom: Sales Profile, Contract Manager, Custom: Support Profile, System Administrator (checked), Standard User, Solution Manager, Marketing User, Custom: Marketing Profile

Language: English

Image Size: --None--

Add Writing Pad:

Back

Point

If you choose objects in 「Relation 1」~「Relation 5」, [Related record] tab will be displayed in AppsME on a mobile terminal.

※This is the case only when 「Object settings」 and 「Layout settings」 of selected object exist.

AppsME Mobile Configuration
Mobile Layout Settings

Layout Name: Account Layout

Object: Account

Relation 1: Contacts (Account ID)

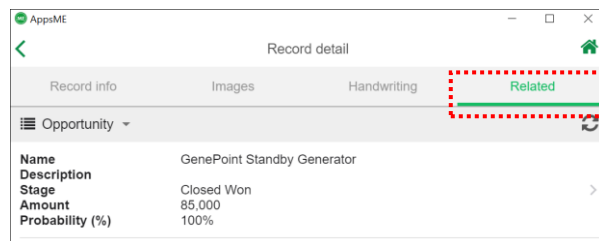
Relation 2: Opportunities (Account ID)

Relation 3: --None--

Relation 4: --None--

Relation 5: --None--

■ Mobile terminal



Point

If you check 「Add Writing Pad」, [Handwriting] tab will be displayed in AppsME on a mobile terminal.

AppsME Mobile Configuration
Mobile Layout Settings

Layout Name:

Object: --None--

Target profile:

Language: --None--

Image Size: --None--

Add Writing Pad:

■ Mobile terminal



6. Enter the name you like in 「Section」, then click [Add] button.

Mobile Layout Save

Target items

Account ID	Private	Name	Description	Stage	Amount	Probability (%)	Quantity
Close Date	Opportunity Type	Next Step	Lead Source	Forecast Category	Campaign ID	Price Book ID	Owner ID
Delivery/Installation	Tracking Number	Order Number	Current Generator	Main Competitor(s)			

Section Add

Please add a section

Save

7. The area the name of which you entered in step 6 will be added.

Mobile Layout Save

Target items

Account ID	Private	Name	Description	Stage	Amount	Probability (%)	Quantity
Close Date	Opportunity Type	Next Step	Lead Source	Forecast Category	Campaign ID	Price Book ID	Owner ID
Delivery/Installation	Tracking Number	Order Number	Current Generator	Main Competitor(s)			

Section Add

Basic Information
Please drop the target item here

8. Click the item you want to display in detail screen on a mobile terminal in 「Target item」, then drag & drop it to the section you created in step 6.

Mobile Layout Save

Target items

Account ID	Private	Description	Stage	Probability (%)	Quantity	Close Date	Opportunity Type
Next Step	Lead Source	Forecast Category	Campaign ID	Price Book ID	Owner ID	Delivery/Installation	Tracking Number
Order Number	Current Generator	Main Competitor(s)					

Section Add

Basic Information

Name
Mobile label Name

Amount
Mobile label Amount

Point

If necessary, repeat step 6 ~ 8 to add sections and target items.

Basic Information

Name
Mobile label Name

Amount
Mobile label Amount

Close Date
Mobile label Close Date

Complementary Information

Private
Mobile label Private

Stage
Mobile label Stage

9. After setting sections and target items, click [Save] button.

Point

Select items and click [▲] [▼] [-] at upper right corner of screen, and then you can change order of sections and delete a section.

10. Layout names are displayed in 「Layout Settings List」, and the layout for each object is set.

Action	Layout Name	Profile	Object	Record Type
Edit Delete	Opportunity Layout	System Administrator	Opportunity	-

1-1 / 1 Page 1 / 1

4. Config on mobile terminal

Install AppsME mobile app and refer to the layout you created in chapter 3.

4.1 Install AppsME mobile app | iOS/Android/Windows10

Install AppsME mobile app.

■ iOS

1. Install OPRO's 「Apps Mobile Entry」 from App Store.

<https://itunes.apple.com/jp/app/apps-mobile-entry/id1417050447?l=en&mt=8>



■ Android

1. Install OPRO's 「Apps Mobile Entry」 from Google Play.

<https://play.google.com/store/apps/details?id=net.opro.product.appsme>



■ Windows10

1. Access to this URL and download the installer.

<https://spc.opro.net/hc/en-us/articles/360008071973>

Point

If you have already logged in to a Salesforce organization from Windows' default browser, you will automatically log in to Salesforce when logging in from AppsME.

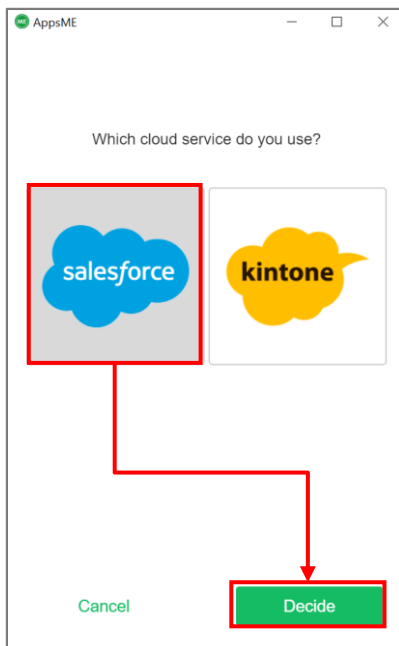
4.2 Launch AppsME mobile app (login)

Launch AppsME mobile app and confirm that the objects and layout you set on Salesforce are displayed.

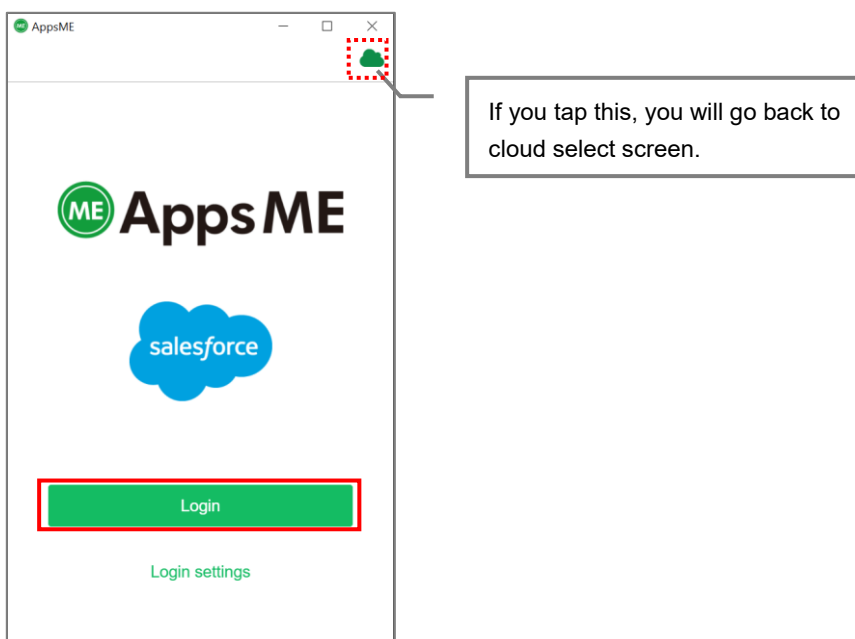
1. Launch AppsME mobile app.
(If you use a smart phone / tablet, tap the icon of AppsME)



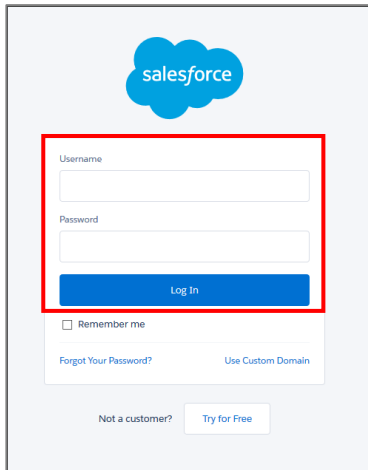
2. Cloud select screen will be displayed.
Select 「Salesforce」 and tap [Decide] button.



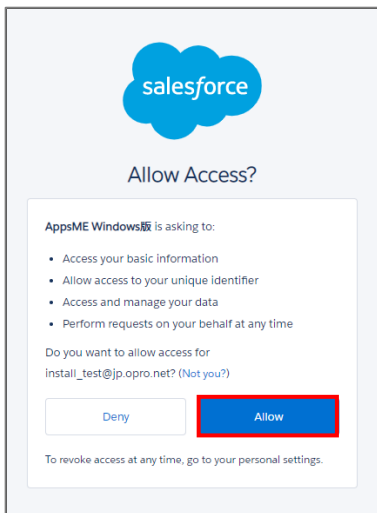
3. AppsME (Salesforce ver.) will be displayed. Tap [Login] button.



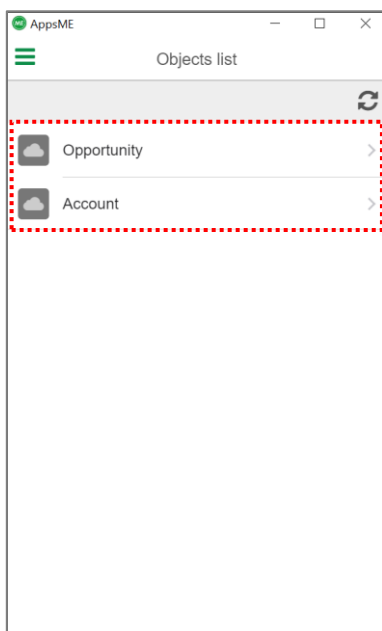
4. Login screen will be displayed. Log in as the user who set profiles.



5. 「Allow access?」 screen will be displayed. Tap [Allow] button.



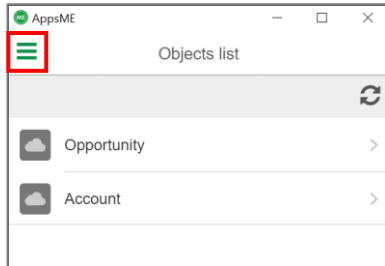
6. The objects you set on Salesforce will be displayed.



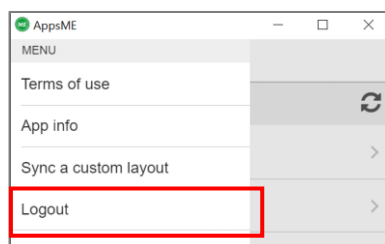
4.3 Quit AppsME mobile app (logout)

Logout procedure is as follows.

1. Tap [Menu] icon.



2. Tap [Logout].



5. Explanation of AppsME

Basic operations and offline operations will be explained.

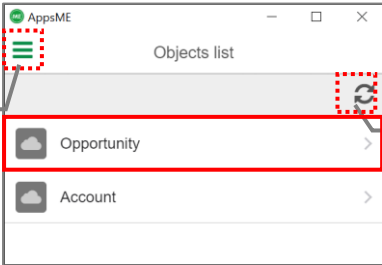
5.1 About basic operations

Basic operations after login and contents displayed on screen are as follows.
Here, take 「Opportunity」 object as an example.

1. If you log in, 「Object list」 screen will be displayed.
Select 「Opportunity」 from the objects.

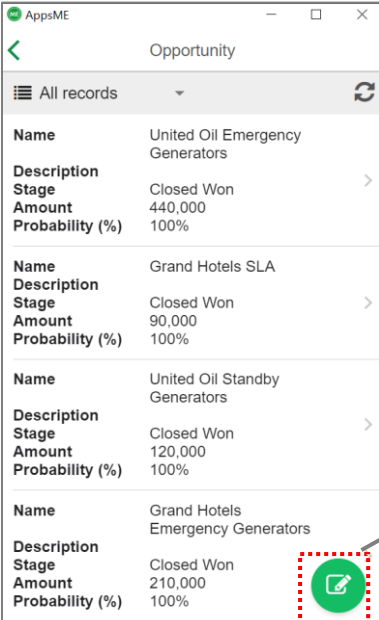
If you tap this, menu will be displayed.

- Terms of service
- Application information
- Sync custom layout
- Logout



If you tap this, screen will be updated.

2. Record list screen of opportunity will be displayed
Tap a record to confirm details.



If you tap this, new record creation screen will be displayed.

3. 「Record detail」 screen will be displayed.

The screenshot shows the 'Record detail' screen in the AppsME application. The screen displays a record for 'United Oil Emergency Generators' with details such as 'Amount: 440,000' and 'Close Date: 2019/5/10'. The screen has a top navigation bar with a home icon, a back arrow, and tabs for 'Record info', 'Images', and 'Handwriting'. At the bottom, there are three action icons: a red trash can, a blue copy icon, and a green edit icon. Callout boxes provide instructions for each icon: the home icon returns to the object list screen, the copy icon copies the record, and the edit icon allows editing the record. A trash can icon is also present, with a callout indicating it deletes the record.

If you tap this, you will go back to object list screen.

If you tap this, you can copy a record.

If you tap this, you can edit a record.

If you tap this, the displayed record will be deleted.

Point

If you check 「Add Writing Pad」 in settings on Salesforce, [Handwriting] tab will be displayed in the screen of a mobile terminal.

This screenshot shows the 'Record detail' screen with the 'Handwriting' tab selected. The main content area displays a large white box containing the handwritten word 'Signature'. A green edit icon is visible in the bottom right corner of the screen, with a callout box indicating it is used to input a handwriting sign.

If you tap this, you can input a handwriting sign.

5.2 About online/offline operations

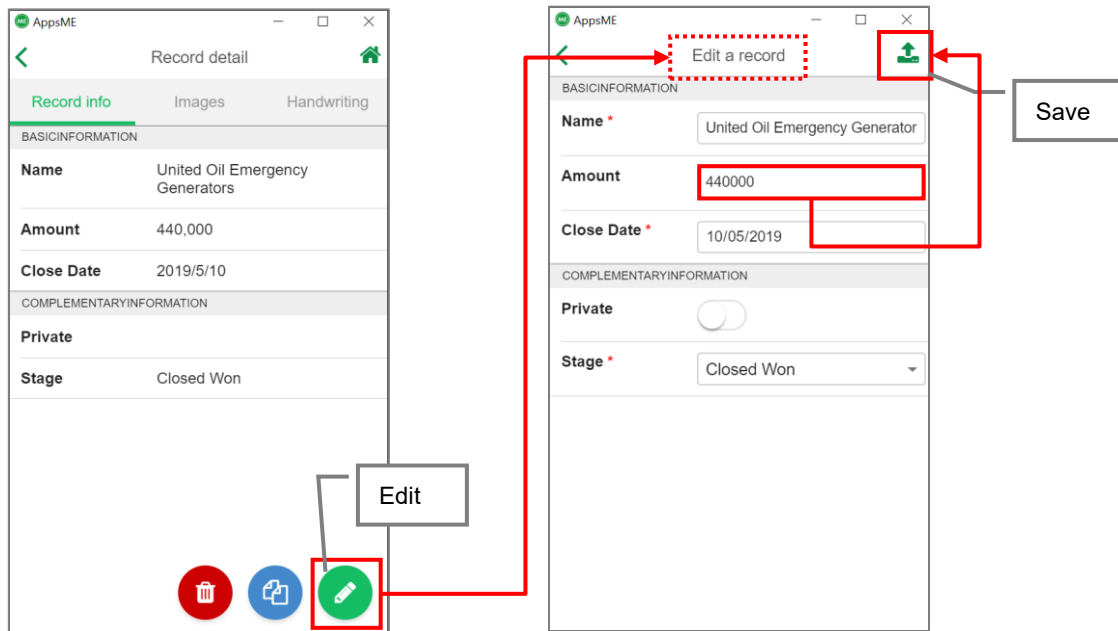
You can edit a record in AppsME even when it is offline.

How to edit when in offline and how to sync data when in online are as follows.

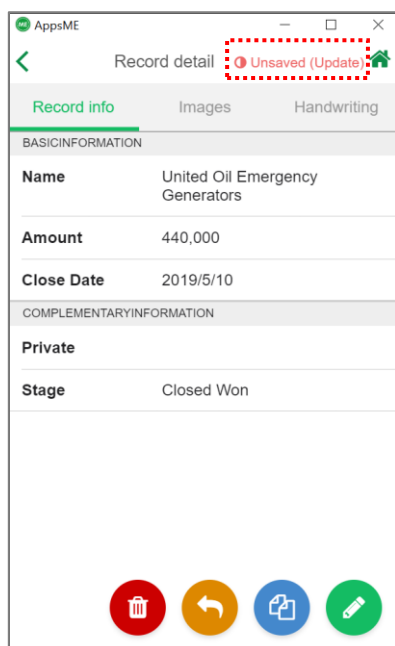
5.2.1 Offline operations

Even if it becomes offline after logging in to AppsME, you can edit a record and save it to local.

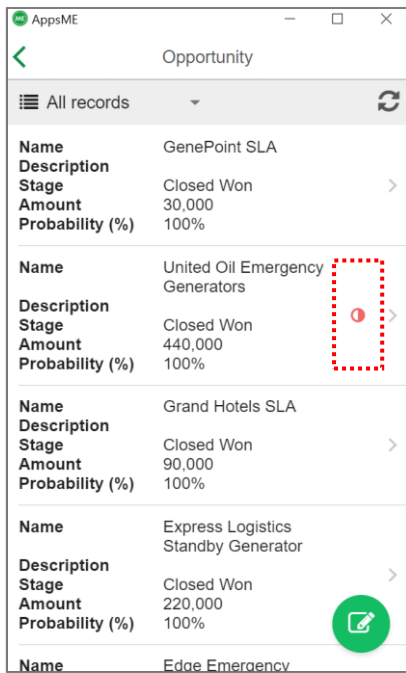
1. Edit a record when in offline and save it.



2. 「Record detail」 screen will be displayed and 「Unsaved (Update)」 will be displayed in red.



3. Go back to record list screen and confirm that a red mark is similarly displayed.

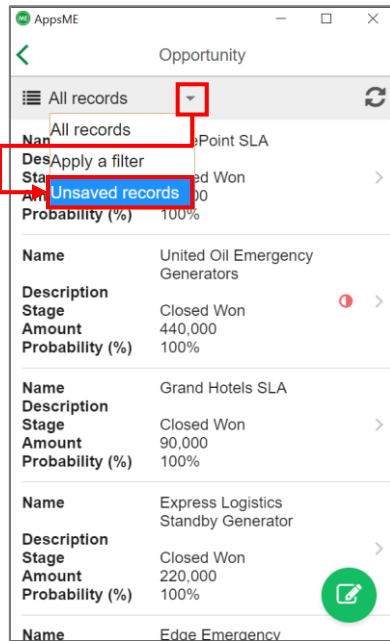


Note If you edit a record when in offline, make sure that you upload data in online.
If you log out of AppsME without upload, edited contents will be deleted. So be careful.

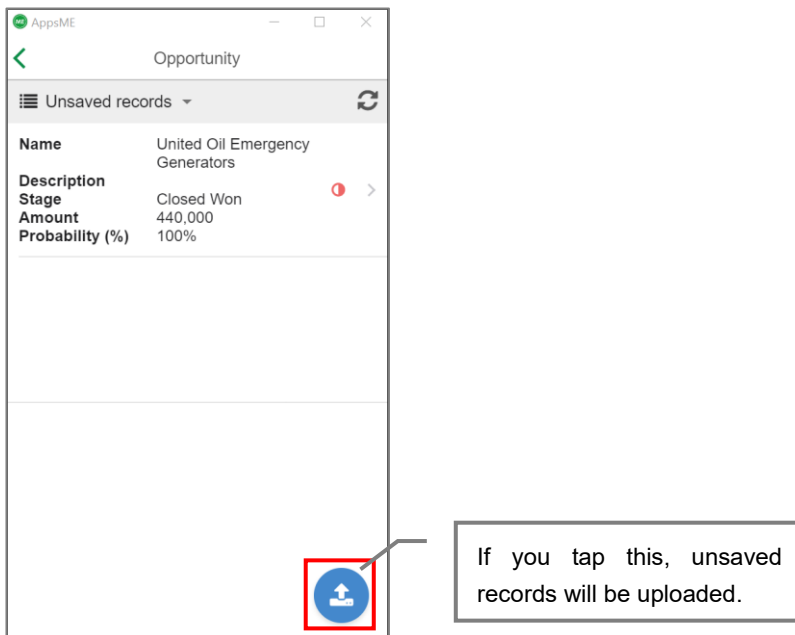
5.2.2 Online operations

Upload data edited in offline

1. Confirm that it is online, and tap 「Unsaved records」 on the filter in record list screen.



2. Tap [Upload] icon. Edited content will be reflected to Salesforce.





AppsME Setup Guide
Salesforce ver.



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