

CHEATSHEET

Stop forcing field reps to scroll through 40 desktop fields on a 6-inch screen. That is why your Salesforce mobile adoption is failing. Here is the config checklist to fix it.

Salesforce Mobile App: Best Practices for Adoption and Usability

A concrete checklist covering navigation design, layout optimization, and offline readiness.

Three root causes account for why field reps abandon the Salesforce mobile app and default back to spreadsheets or memory.

- ✦ Desktop layouts pushed to mobile (40+ fields require endless scrolling).
- ✦ Navigation items reflecting internal org structure rather than user workflows.
- ✦ No offline strategy (reps hit sync errors in low-connectivity areas).

The mobile navigation bar supports up to 20 items, but the practical limit for usability is 7–8. Every extra item competes for your reps' attention.

- ✦ Audit current navigation against the top 5 real-world user tasks.
- ✦ Navigate to Setup -> Mobile Apps -> Salesforce -> Mobile Navigation.
- ✦ Drag the most-used objects (e.g., Accounts, Tasks) to the top.
- ✦ Remove objects a field user would never access on a phone.

Reps who need to log a call in a parking lot will not scroll through dozens of fields. You must optimize page layouts specifically for mobile contexts.

- ✦ Use Dynamic Forms to hide non-essential fields on mobile devices.
- ✦ Place key action buttons (Log a Call, New Contact) in the mobile action bar.
- ✦ Set up compact layouts to highlight critical record details at a single glance.

THAT'S A WRAP

Maximize Your CRM Mobile ROI

Stop wasting licenses and suffering from poor CRM data quality. Get the full setup, offline, and governance guide on SalesforceLWC.

→ salesforcelwc.com

5 slides

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