My Products for Salesforce iOS App

Purpose

This document is intended for Salesforce Admins who want to confirm that their orgs are configured to support use of the My Products for Salesforce iOS app.

App Description

The My Products for Salesforce iOS App is a native iOS app built with Salesforce that gives users access to their Sales Cloud product and price information either online or offline. The app is used to display product information on an iPhone or iPad and then to share the product information in the form of a single-page PDF via email, text, printer, social media, or any other sharing available on the iPhone or iPad. In addition, the app can create a new Lead in Salesforce for anyone with whom product information is shared.

Setup

Product Information
Product name, description, and product code are from the Product2 object.

Prices
The app matches products to the prices in the first active Pricebook for the user. Pricebooks and prices are optional. If there are no active Pricebooks or a product price is missing or $0.00 then the app will hide the price on the screen and in the PDF.

Product Images
Product image files should be stored as Salesforce Document objects. The id of the image Document should be contained in a custom field on the Product2 object with api name Image_Document_ID__c. Image Documents are not required for the app to function.

Leads
To create new Leads from the app the user requires permission to create new Leads in their org.

Support

For additional support or app customization please contact Joseph Nardone Consulting at 732-997-9609 or joseph@josephnardone.com

Joseph Nardone Consulting