



GridBuddy

Mobile Best Practices

GridBuddy Mobile Best Practices

This document is a high-level guide about how you can provide your users with the best mobile experience for GridBuddy. Grids can be accessed on any mobile device via the SF1 app or via a browser. Regardless of how grids are accessed, we recommend following the best practices detailed below.

Your end-users should use mobile grids to enter and edit a small amount of data – ie. what they need while they're on the go. Back at a computer, they can add additional details in a fully configured grid view.

For details on how to configure grids in the SF1 app, please visit the [GridBuddy User Guide](#).

Recommended best practices for mobile grids:

1. Keep it simple

- a. Your mobile-optimized grids should only offer a few input fields so that your end-users can make updates on the go
- b. Avoid horizontal scrolling since screen real estate is limited
- c. Show a maximum of 5-10 records per page
- d. Limit the number of children objects to one or two records each. For example, an Opportunity grid with Tasks as a child could show the most recent 2 tasks associated to each Opportunity.

2. Use the Data Card feature

- a. Use a maximum of 3 primary fields to limit horizontal scrolling in your grid
- b. Put any other necessary fields in the data card

3. Optimize mobile grids with extensions

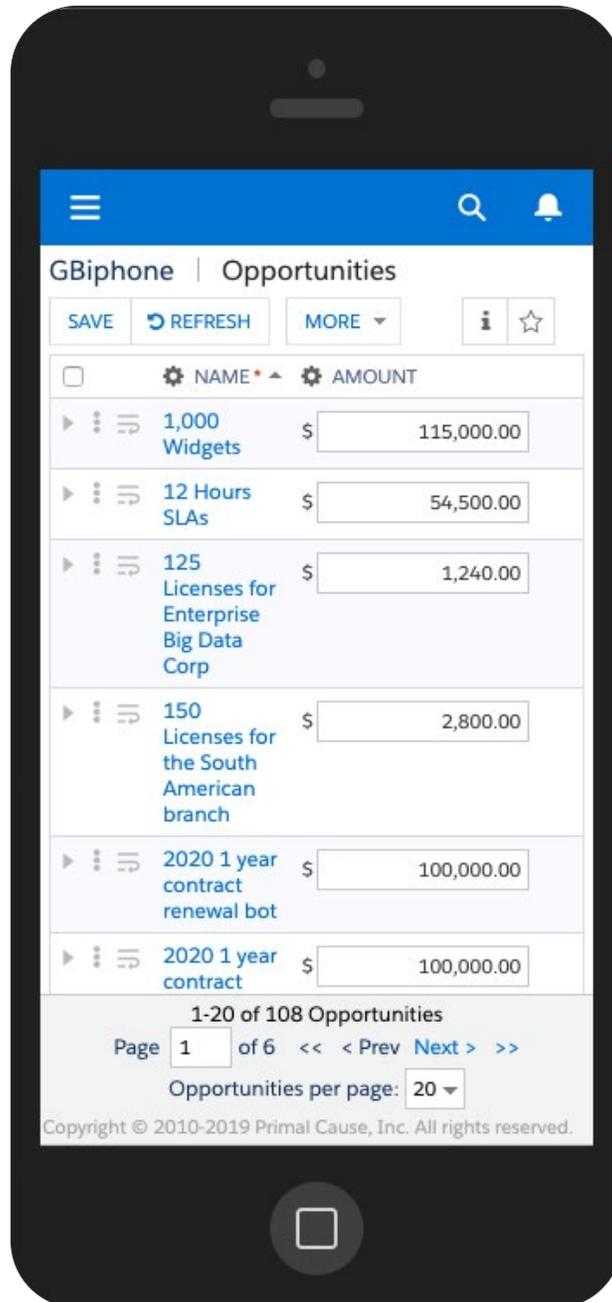
- a. Use CSS to hide un-used buttons and grid features to keep the grid simple and light
- b. For example, hide the object name at the top of the grid, the 'more' button, the 'show' button, the action eclipses, etc.
- c. CSS can also be used to vertically align fields

4. The following features are not recommended or supported in mobile grids:

- a. The Grids tab, Column sorting, Batch and Global actions, User Defined Filter widget, Grid Export, the Grid Wizard, mass create, mass update.
- b. Any grid configuration must be done on a desktop grid. For example, adding or removing fields, creating admin filters, or making any other changes to the grid

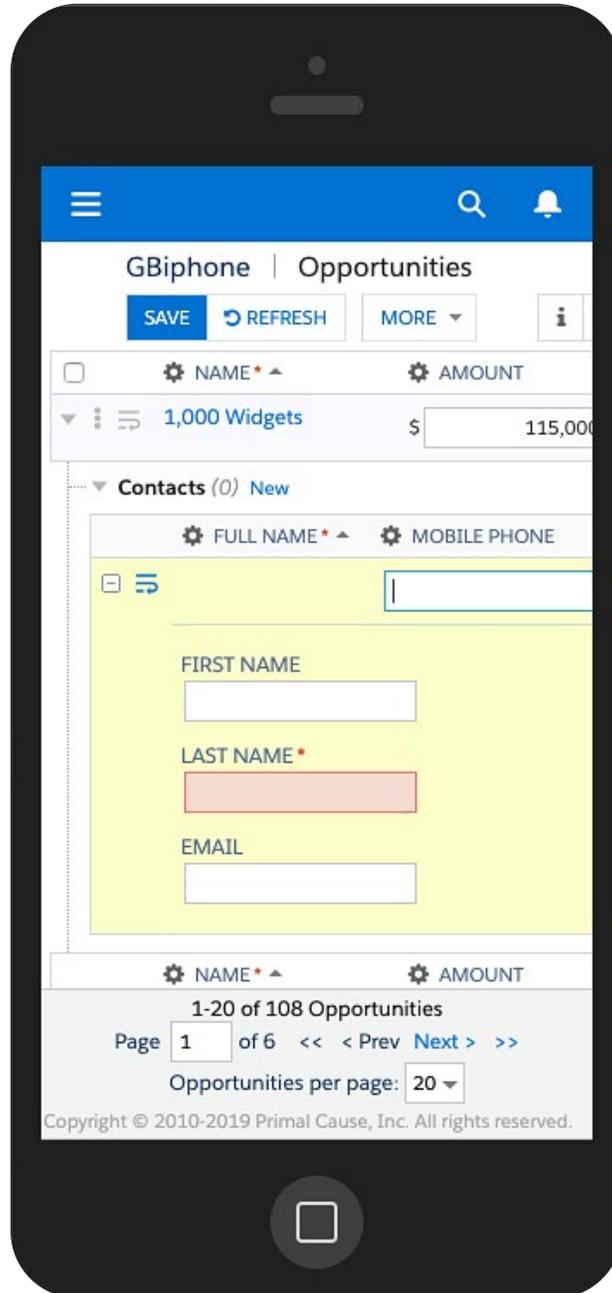
Example Mobile Grid: Opportunity Pipeline

- This is an Opportunity grid. All unnecessary buttons have been hidden.
- This grid was accessed from the left nav bar in the SF1 app.



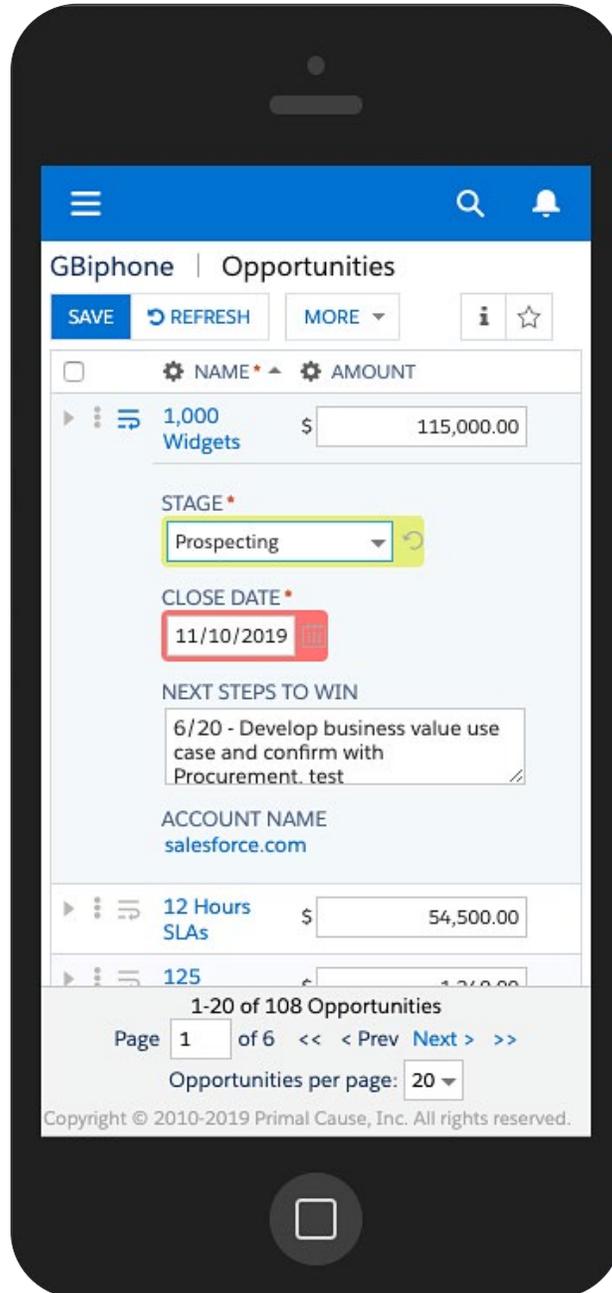
Example Mobile Grid: Opportunity Pipeline

- The yellow represents a new, unsaved record which uses the Data Card feature.



Example Mobile Grid: Opportunity Pipeline

- The red and yellow colors are conditional formatting, set up in Grid Wizard 2.



Contact Us

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