SalesDesktop for Salesforce.com
Frequently Asked Questions
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1. Installation and Setup

Q 1: Is it allowed to use Salesforce Connect for Outlook and SalesDesktop simultaneously?

Actually, you should use only one solution at a time. The Connect for Outlook and SalesDesktop synchronizes the same data between your Salesforce.com account and your Outlook independently. This will cause duplicates in your Outlook. Please uninstall the Connect for Outlook prior to SalesDesktop installation.

**WARNING:** SalesDesktop v3 or higher cannot be installed on the computer where Salesforce Outlook Edition is installed.

After you uninstall the Connect for Outlook, all records that have been added to Salesforce.com such as contacts and tasks remain in Outlook folders. If you install SalesDesktop right after uninstalling the Connect for Outlook, you will get duplicates for all downloaded Salesforce.com records in your Outlook.

To install SalesDesktop on the computer where Connect for Outlook is installed, proceed with the following steps:

1. Uninstall the Connect for Outlook.
2. Clean your Contacts, Tasks, Calendars folders from the records, for those Category is equal <Salesforce.com> (this category is assigned to all records downloaded from Salesforce.com).
3. Install SalesDesktop.
4. Run SalesDesktop synchronization.

Q 2: Is it allowed to install SalesDesktop in per machine mode?

No, it is not allowed to install SalesDesktop in per machine mode, due to certain security-related limitations in Windows. SalesDesktop can be installed only for the current user. If SalesDesktop is intended to be used by several people on a single computer, then, each of these users shall install SalesDesktop under his/her own Windows account.

To install SalesDesktop, each user running the installation shall have administrative privileges or shall be able to enter the administrator’s password when requested.

**NOTE:** Uninstalling SalesDesktop by any person, who uses the computer, will disable SalesDesktop for all other users. If you need to uninstall SalesDesktop for a particular user, first uninstall SalesDesktop under the desired user’s account, and then install SalesDesktop over the existing installation under any other user’s account.

Q 3: Which types of Outlook storages are supported by SalesDesktop?

Currently, SalesDesktop supports these types of folders (message stores):

1. Personal Folders Files (.PST) configured with POP3 mail account.
2. Exchange mailbox in cached mode (.OST).

Non-cached mailbox is not supported due to possible performance problems.

Other types of message storages are not supported. Particularly, the IMAP folders and Archive folders cannot be used. When Outlook starts the first time after install, please wait for the SalesDesktop installation process to continue.
Q 4: Is it possible to install SalesDesktop several times on the same Exchange account?

Currently it is not possible to install SalesDesktop on two computers with the same Exchange account. If you need to install SalesDesktop on another machine, install it on a different Exchange account or a new Personal Folders storage.

In case if you want to install the SalesDesktop on the same Mailbox but on another computer, it is required to uninstall SalesDesktop from the primary computer first. If you have attempted to install SalesDesktop on different machines but the same Mailbox and received an error, please contact support@invisiblecrm.com.

Q 5: I could not log into my Salesforce.com account from my SalesDesktop. The system says that my security token is needed. How can I log in?

A security token is an automatically generated key that you must add to the end of your password in order to log into Salesforce from an untrusted network. For example, if your password is 123, and your security token is XXXXXXXXXXX, then you must enter 123XXXXXXXXXX to log in. You are offered a security token if you try to access Salesforce from an untrusted network. Once you have been issued a security token, you have the option to reset this security token at any time.

**NOTE:** It is recommended to obtain a security token using the Salesforce user interface from a trusted network prior to access Salesforce from a new IP address.

**To change your security token in Salesforce.com**

1. Log into Salesforce.com web site.
2. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select Setup or My Settings—whichever one appears.
3. From the left pane, select one of the following:
   - If you clicked Setup, select My Personal Information | Reset My Security Token.
   - If you clicked My Settings, select Personal | Reset My Security Token.
4. Click the Reset Security Token button. The new security token is sent via email to the email address on your Salesforce user record.

If you have never been offered a security token, for example, because your organization restricts the IP addresses from which you can log in, the Reset My Security Token node does not appear in your personal settings.

**To log in with a security token:**

1. After changing the security token, launch SalesDesktop.
2. Then right-click on the SalesDesktop icon and choose the Options menu item.
3. In the Options dialog box, under the General tab, click the Change button.
4. In the Password field enter the “password+new security token” without any extra symbols or spaces.
5. Click the Login button.
6. Click OK to close the SalesDesktop – Options dialog box.
Q 6: After installation and launching SalesDesktop proposes to convert personal contacts to “unshared business contacts”. What does it mean?

The following message appears when you launch SalesDesktop first time: “Should the SalesDesktop installation process convert existing Outlook contacts to unshared business contacts”.

SalesDesktop has a possibility to convert all of your Contacts, Events and Tasks automatically. Click Yes in the message to convert all your personal contacts to SalesDesktop contacts. Then you can open converted contact in Outlook and click on the Sharing Bar “Share with Salesforce” in the forms to upload records to Salesforce.com during next synchronization.
2. Configuration and Usage

Q 1: How to view Salesforce accounts, leads, or opportunities within Outlook?

SalesDesktop brings your CRM data into Microsoft Outlook. SalesDesktop creates new folders for Accounts, Cases, Documents, Leads, and Opportunities and uses the existing Calendar, Contacts, Notes, and Tasks to store Salesforce items in Outlook.

You can work with the downloaded Salesforce items as with any standard MS Outlook items:

- View items (through the forms or customized views);
- Add new items;
- Modify existing items;
- Delete existing items.
Q 2: I’ve installed SalesDesktop, but I have no SalesDesktop in my folder list. Why does this happen?

To see all the added SalesDesktop folders, just switch to the Folders List mode:

Q 3: How can I know which are my private Contacts when all personal and Salesforce items are in the same folder?

You can distinguish the “Shared with Salesforce items” from the “Not shared with Salesforce items” in the Outlook views by their icons, which differ from each other:

- Contacts shared with Salesforce.com
- Unshared contacts
- Native Outlook contacts

When you open the form, you can see the Sharing Bar. This bar shows you if the item is shared with Salesforce or not.

Shared items have a bar like this:

Not shared items have a bar like this:

You can change the status of the item by clicking on this bar.
**Warning:** Stopping of sharing will lead to the deletion of the item from Salesforce. If you have stop sharing of more than 20 contacts, at the next synchronization, you will be asked to confirm or revert these deletions in the Confirm Synchronization tab of the Synchronization Control Panel. Do not confirm it, if you do not want to remove the item from Salesforce.

If you need to save your personal version of the item, then create a copy and do not share it with Salesforce.

**Q 4: I do not want to share my every new Outlook item with Salesforce. How can I do this?**

SalesDesktop automatically shares every Account, Lead or Opportunity, which is created in Outlook. To share or not to share a new Contact, Task or Calendar Event automatically, you can set the corresponding properties in the SalesDesktop options **Advanced** tab.
Q 5: Is it possible to select the contacts list, which I want to synchronize?

SalesDesktop is designed in such a way that users can only synchronize items in the following subfolders: Accounts, Calendar, Cases, Contacts, Documents, Leads, Notes, Opportunities, and Tasks.

Q 6: Can I synchronize attendees in my Calendar Events with Salesforce.com?

Unfortunately, since the Salesforce API does not provide such possibility, we cannot add event attendees to the synchronization scope.

Q 7: How do you apply categories to the items processed by SalesDesktop?

SalesDesktop does not apply any categories to items Shared with Salesforce. It just uses a special field <Shared with Salesforce.com> to keep the item’s status.

Q 8: How do I associate an email message with ALL the recipients that it was sent to?

You can link your mail to several Salesforce records by using the “Save Mail” button several times.

Q 9: What should I do if during synchronization, SalesDesktop says the estimated amount of records exceeds the limit?

The following message appears during synchronization:
“Estimated amount is 23580 objects and it is higher than persisted limit (20000 objects).
“Stop for modifying filters” “Continue synchronization”.

During synchronization, SalesDesktop compares the number of the Salesforce records available for synchronization with the predefined limit or number of records as set by the filters. If the number of the available records exceeds this limit (20000 by default), SalesDesktop shows the information dialog with a corresponding message. You can either change the current filters to reduce the number of the available records or confirm synchronization for the currently available number of records:

• To change the current filters select the button Stop for modifying filters. Change filters and then start the synchronization again.
• To confirm synchronization for the currently available number of records select the button Continue synchronization.

If you confirm synchronization with the current filters, then SalesDesktop will automatically increase the limit value to allow such number of records to pass through.

Q 10: Is it possible to synchronize and view items, which are not assigned to me?

SalesDesktop provides you with flexible filter possibilities. The filter contains a set of rules applied to Salesforce categories of records. Every single rule consists of record field, criteria and value to match. By default, these rules are set to allow access to only records owned by a particular user, and the user can change them.
To include your colleagues' records into scope, change the Owner ID criteria from “equals” to “in” and select the required users from the list. Also you can create separate filter criteria and select ‘Any’ option to filter all items and show those, which match any of the specified criteria.

To limit your Customers by location, add Billing or Shipping Country or State/Province with equal criteria and type the value you want.

To select only the important Opportunities, set the rule for Amount, Stage or Close Date to correspond to your company’s values from Salesforce.

Q 11: Can users view/modify/delete items, to which they do not have permissions in Salesforce?

No, it is not possible. Such actions will be rejected by Salesforce during synchronization. But since Outlook does not support such actions, items changed in Outlook will remain changed in Outlook and a user will receive a synchronization issue in the Synchronization Control Panel describing the problem.

Q 12: How can I close SalesDesktop? It does not have an Exit option in the menu.

We do not support the Exit command in the SalesDesktop context menu in the Windows tray. SalesDesktop is a natural extension of the standard MS Outlook functionality and such closing is against the Outlook rules. Like many other add-ins, SalesDesktop can be disabled in the Outlook Options -> Add-Ins form in MS Outlook.

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Q 13: How to resolve SalesDesktop collisions?

Usually, a collision occurs when synchronization discovers that an item has been changed on both your computer and Salesforce since the last sync session. SalesDesktop notifies you about such collisions with a pop-up balloon with an exclamation mark over its tray icon.

To resolve the collision, you can pick the copy of the item you want to stay with. The other copy will be replaced. Also, you can select those fields that you want to save in the result. You can resolve all collisions the same way by using the buttons SalesDesktop overwrites or Salesforce.com overwrites in the of the Synchronization Control Panel. Alternatively, you can skip the collision and resolve it later by opening the corresponding dialog window from the SalesDesktop context menu in the Windows tray.
Q 14: When does Confirm Synchronization tab appear in the Synchronization Control Panel?

If synchronization has found some irreversible and illegal operations such as delete, then the Confirm synchronization window appears. In this case the synchronization is paused and it requires you to confirm such operations or revert them.

To confirm deletion of the record, click the green check button next to this record or click on this record to open its details and then click the Accept button.

To revert deletion of the record, click the blue undo arrow next to this record or click on this record to open its details and then click the Revert button.
Q 15: Is it possible to save emails automatically?

SalesDesktop supports two ways of tracking mails: manual and automatic. To save an email manually, select this email in the Inbox and click Save Mail button on the SalesDesktop ribbon, while all mails may be saved automatically, if the Save correspondence to the Salesforce option is selected in the Contact form:

Q 16: Is there a possibility to automatically set the “Save correspondence to Salesforce” option for every new Contact, Account or Lead?

The current version of SalesDesktop does not provide such possibility. But it is possible to create a special custom version for your company that will have this functionality enabled automatically for all new Contacts, Accounts and Leads. Please send us a request to sales@invisiblecrm.com in case you are interested in such version.

Q 17: Does SalesDesktop support custom objects and custom fields?

SalesDesktop supports customization as special solution designed by our Professional Services Department on customer request. If you need specially customized SalesDesktop, please discuss this with your invisibleCRM account manager or send a request to sales@invisiblecrm.com and our representatives will give you all necessary details.

Q 18: What will SalesDesktop do with contacts and activities (task and calendar items) if I uninstall it?

The uninstallation of SalesDesktop will remove all Salesforce-originated items from the storage, where SalesDesktop has been installed. It is highly recommended to synchronize all of your recent changes before SalesDesktop uninstallation.
Q 19: How to convert Outlook contacts to Salesforce and vice-versa?

Standard Outlook contacts are shown in the standard Outlook form, not in the extended SalesDesktop form. You can distinguish standard Outlook contacts from SalesDesktop contacts by their icon.

To convert Outlook contact to SalesDesktop contact:

1. Select Outlook contact in the list.
2. Click the Convert to Salesforce button on the SalesDesktop toolbar or ribbon.

**NOTE:** Outlook contacts converted to SalesDesktop contacts are not shared with Salesforce.com automatically.

You can share SalesDesktop contact with Salesforce by clicking the Sharing Bar in the Salesdesktop form.

**NOTE:** SalesDesktop does not allow sharing of multiple contacts simultaneously.

To convert SalesDesktop contacts to standard Outlook contacts:

1. Select Salesdesktop contact in the list.
2. Click the Convert to Outlook button on the SalesDesktop toolbar or ribbon.

Q 20: Why the number of records calculated at the SalesDesktop Filters dialog differs from the number of records downloaded into the Outlook folders from Salesforce?

The reason for this is that SalesDesktop synchronizes items passed through the SalesDesktop filters and their relations. For example, if a Salesforce Contact has passed through the filters, SalesDesktop downloads the Account, which it belongs to, into the Outlook during the same synchronization session. And, it does not matter if this Salesforce Account has passed through the filters itself or not. You can find the same relationship between an Account and its parent Account, an Opportunity and the Account it belongs to, a Case and the Contact it relates to, and so on.

Q 21: How to convert a lead into a contact in the Outlook using SalesDesktop?

SalesDesktop does not allow to convert a lead into a contact, but you can shift to Salesforce.com quickly using a functionality provided by SalesDesktop, and perform conversion in Salesforce.com:

1. Select a lead in SalesDesktop and click on the Salesforce.com button on the toolbar.
2. Salesforce.com opens with your credentials logged in automatically.
3. Use standard Salesforce.com mechanism to convert a lead into a contact.
Q 22: In the Synchronization Control Panel the following message appears: “The record could not be synchronized because it’s currently opened in form”

This happens when any object is opened in the form when you run the synchronization. Save and close the record in Outlook and then run the synchronization again to resolve the problem.

Q 23: How SalesDesktop for Salesforce works with recurrent appointments and tasks

SalesDesktop for Salesforce allows to create recurring calendar items in Outlook and share them with Salesforce. Also recurring appointments, created in Salesforce will be synchronized with Outlook and appear in calendar as recurrent appointment.

NOTE: Changes made for a specific appointment occurrence are not synchronized with Salesforce. Due to a technical limitation in Salesforce API only changes to the series are synchronized.

Tasks functionality is limited and recurrent tasks can not be created in Outlook, but recurrent tasks from Salesforce will be downloaded into Outlook as separate task for each occurrence.

Q 24: How to configure filters in SalesDesktop to reduce the amount of objects synchronized

This section describes how to reduce the amount of objects, which are synchronized with Salesforce.

1. Right click on SalesDesktop icon in the system tray and select the Show Control Panel... item.
2. In the **Synchronization Control Panel**, open the **Filter Records** tab and check the estimated amount of records that will be synchronized. The less records you synchronize, the less storage space is used on your Exchange server.

3. If some objects are not used by your company, you can exclude them from synchronization scope by clearing the check boxes.

4. If there are a lot of records of specific type (e.g. Contacts), the amount can be reduced by adding the custom filtering criteria. For example, you can synchronize only those contacts that have been created since specific date. By default, SalesDesktop synchronizes only objects assigned to your username.
5. Also, when downloading an object, SalesDesktop downloads objects linked to it, even if they don't match your filter criteria. To disable them, expand the top-level object node in the Synchronization Control Panel and disable linked objects, which you don't need.

6. Click the Save button to save your changes.

7. Right-click on the application icon in the system tray and select the Synchronize All Changes from the menu, to synchronization to remove unnecessary objects from Outlook storage.

Q 25: How to link existing contact to account in Outlook?

There is no ability to link an existing contact to account in the Account form in Outlook. You can only unlink a contact and create a new contact.

To link an existing contact to an account:
   1. Open the contact in the Contact form.
   2. Select an account in the Account Name field.

Q 26: Does Salesforce work on Citrix environment?

Citrix environments are not supported.

Q 27: Can SalesDesktop work on multiple mail profiles at the same time?

SalesDesktop can not work on multiple mail profiles simultaneously. If SalesDesktop is configured for the one profile and Outlook is started with another mail profile, SalesDesktop will not launch.