SalesDesktop for Salesforce.com
Quick Tour

Product Version: 3.2.0.97
Introduction

Overview
SalesDesktop for Salesforce drives user adoption by melding Salesforce functionality into the native Outlook environment, encouraging greater Salesforce usage. It allows users to process emails easily and effectively and offers all customer information, contact, calendar and task lists in one slot.

- All Salesforce.com CRM objects are located inside Microsoft Outlook. Users can perform all operations in a single familiar place.
- Use the power of Microsoft Outlook to organize, combine, and sort large information lists to build unique and insightful profiles of customers.
- See all your customer CRM information in SalesDesktop, using native Outlook layouts and added tabs for SalesDesktop.
- Anytime. Even offline.

Obtaining Software and Installation
To get the SalesDesktop installation package, go to the invisibleCRM web site http://www.invisiblecrm.com, select Enterprise or Professional version and click the try/buy button, fill in the registration form in case if you want to buy the software.
You will receive an email with the link to the installation package and setup instruction. Download the installation package, run it and then follow the installation wizard’s instructions.
After Installation

1. The SalesDesktop icon represents the application’s activity and status.
2. The SalesDesktop context menu is the only way to operate with the application.
3. Click Options menu item to change SalesDesktop settings, check license information or send a feedback to the InvisibleCRM Support Team.

Where Is It?
When installed, SalesDesktop is loaded as an Outlook add-in every time you start the Outlook. There is no self-running application for SalesDesktop that you can open and close.
Once the Outlook is opened, please, note that the SalesDesktop taskbar icon will appear next to the Outlook icon.

Welcome to SalesDesktop Assistant
In order to fill SalesDesktop folders with Salesforce data, you need to enter your Salesforce login information, set up filters to reduce the amount of downloaded Salesforce records and run the synchronization.
The SalesDesktop Assistant friendly guides you through all the steps that are necessary to setup the initial SalesDesktop settings and run the first synchronization.

First Run
On the first login, you will be prompted to register in SalesDesktop. This is required to identify you along with the other SalesDesktop users. We guarantee that all your personal information will be kept safe and confidential and that under no circumstances will it be shared with or disclosed to third parties.

NOTE: You can change your login any time while working with SalesDesktop from the taskbar menu. In such case, all your Salesforce contents will be removed and the new items downloaded from Salesforce after the next synchronization. This could lead to a loss of unsynchronized documents. To avoid this, SalesDesktop makes a backup of your SalesDesktop content before switching the account.
Advanced Connection Settings

SalesDesktop requires an Internet connection to register you during the first connection and connect to your Salesforce account in order to synchronize SalesDesktop folders with Salesforce.com. SalesDesktop tries to use the Internet Explorer settings for proxy server to establish a connection. If it is not possible to establish an Internet connection using these settings, SalesDesktop will ask you to specify the connection settings manually.

SalesDesktop Folders

After this, when the login and password are specified, SalesDesktop creates a structure for common Salesforce items. Subfolders for Accounts, Documents, Leads, Opportunities and Products now exist. This structure is entirely exposed in the Folder View of Microsoft Outlook.

1. Switch to the Folders View to see the Salesforce items.
2. 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.

Filter Settings

The next step of the First Run Assistant wizard, after specifying the logging credentials, you can configure filters.

The Synchronization Filters are used to limit the number of records that will be downloaded from Salesforce.com during synchronization. By default all records will be downloaded.

1. Click Add a Condition button.
2. Select required item from the Field drop-down list.
3. Choose the Condition ( =, <, >, <=, =>, < >, IN, Is Null, Is Not Null, etc).
4. Set the value, start typing and the matching items will be displayed in the list.
5. If you have added several filter criteria, select All or Any option to specify all or any criteria must be match. The All option is equal to the AND logical operator. The Any option is equal to the OR logical operator.
6. After configuring the filter rules, click Save button to save this filter.
Estimated Record Counts

Select records (opportunities, accounts, contacts, tasks, leads, events, etc.) that must be synchronized by checking them in the left panel of the Synchronization Control Panel window. Estimated number of the records will be displayed close to the record category in the left panel and total sum will be displayed at the bottom of the window.

Click the plus sign before the record category to expand the node, view and select or deselect the child objects.

Synchronization Schedule

The next step of the First Run Assistant allows you to configure a schedule of the synchronization. By default, synchronization runs automatically every hour starting from the time you first synchronize. You can adjust this interval or disable the automatic synchronization.

In the SalesDesktop – Options dialog box, that appears after you have configured the synchronization filters and close Synchronization Control Panel window.

Also you can set Show progress during automatic synchronization option to view the progress each time when the automatic synchronization starts.

Default Presets

A preset is a filter saved by user or default system filters configured by invisibleCRM.

To view or apply presets, click Presets button in the Synchronization Control Panel window, then select the preset, and click Apply button. Note that the default system presets cannot be renamed or deleted.

NOTE: Modifying the filters will reduce the amount of displayed Salesforce records, which are already present in SalesDesktop. Filters work in a single direction only, from Salesforce to SalesDesktop. This means that all changes made to any record in SalesDesktop regardless of the filter settings will be uploaded to Salesforce during the next synchronization session.
**Advanced Settings**

During configuring advanced settings in the dialog boxes that appear First Run Assistant, you can specify whether the attachments and embedded images must or must not be included into the mails and whether the newly created Microsoft Outlook items should or should not be shared with Salesforce.com by default.

To do this, select or deselect Include attachments, Exclude embedded images, and Always share with SalesDesktop new items (contacts, tasks, calendar events) options correspondingly.

Choose Local or Remote option from the Collision resolution strategy drop-down list to resolve duplicates for benefit of the local or remote storage, or select None to propose a user to select which record should be kept, local or remote, when a duplicate is found.

**Confirm Conversion of the Existing Contacts**

After configuring all settings in the First Registration Wizard and the first synchronization, you will be proposed to convert existing Outlook contacts to the business contacts with unshared status. Click Yes to convert contacts or No to discard the conversion.

**NOTE:** Converted contacts will not be shared automatically. You can run this conversion later by clicking the Convert -> To Salesforce.com button on the Quick Access Toolbar.

**Logging and Reporting Configuration**

In the SalesDesktop – Options window click Configure Logging and Reporting button to specify the logging policy profile (Basic, Detailed, Exhaustive or Custom) and select the level of logging verbosity (Debug, Info, Warning, Error or Fatal).

By default, Custom logging policy is selected, and the General log and the Log application crashes options are specified.

**NOTE:** All synchronization and configuration settings you can modify after installation of SalesDesktop. To do this right click on the application icon in the Windows task bar and select Options from the drop-down list. These settings should be changed only for troubleshooting properties on request of invisibleCRM Support Team.

**First Synchronization**

Now SalesDesktop is ready to start the synchronization process. Synchronization checks Salesforce for the appropriate items and downloads them to your computer. The progress dialog will show the stages of synchronization process and the percentage of recently synchronized items.

**NOTE:** Depending on your Internet connection, the number of the accessible records and the documents size, the first synchronization could take a long period of time, sometimes it could take more than an hour.
Folder List

The Folder List is the standard pane on the left side of the Microsoft Outlook window. It allows you to navigate through folders used for categorizing locally stored records. After you install SalesDesktop, a number of custom folders are automatically added to Folder List. SalesDesktop stores records in the following folders: Accounts, Cases, Contacts, Documents, Leads, Opportunities, and Tasks.

Explorer View

The Explorer List is the standard pane of the Microsoft Outlook window. It allows navigating through records stored locally, such as Contacts, Tasks, E-mails, and so on. After you install SalesDesktop, a few custom folders are automatically added to the Folder List. These are Accounts, Cases, Documents, Leads, and Opportunities. Selecting any of these folders, you will be able to navigate through the records stored in the corresponding folder.

NOTE: The Explorer List only displays direct records that have been automatically added while synchronizing with Salesforce.com. Please, take into account that depending on the instance you have selected in the Explorer View pane, functionality of Microsoft Outlook menu commands and appearance of ribbons may differ.

SalesDesktop Ribbon

The SalesDesktop ribbon is available in Microsoft Outlook 2007, 2010 and 2013. SalesDesktop ribbon appearance as well as button behavior depend on:

- Which folder is selected in the Folder List.
- Which item is selected in the Explorer List.
- Whether the selected item is shared or unshared with Salesforce.com or is native to Microsoft Outlook.

The image shows an example of the SalesDesktop ribbon available when unshared CRM contact is selected in the Contacts explorer view:

SalesDesktop ribbon allows you to perform the most frequently used Salesforce.com actions. For example, click Contact, Account, Opportunity or Lead button to create new contact, account, opportunity or lead, correspondingly. Click Attach File or Attach Note button to add attachment or create note and add it to the selected contact.
SalesDesktop Form, Sharing Bar and Extension Bar

Users work with SalesDesktop in the same way as they work with Microsoft Outlook as the standard Microsoft Outlook forms are extended to display SalesDesktop data. The forms contain additional fields and sections that allow users to add, modify or delete CRM data directly in Microsoft Outlook.

The Sharing Bar is a control, which you can use to define whether the CRM record should be shared with Salesforce.com while next synchronization. The Sharing Bar is available for the following data: contacts, calendar events (appointments or meetings), and tasks.

The Sharing Bar is grey if an item is not shared with Salesforce.com.

The Sharing Bar is green if an item becomes shared with Salesforce.com.

If you set in Advanced Settings tab of the SalesDesktop – Options dialog box, a CRM data instance to be always shared, then SalesDesktop may create the corresponding record on the Salesforce.com during the next synchronization.

NOTE: The Sharing Bar is not available in the form if the record is configured to be shared automatically. Refer to the “Sharing Data with Salesforce.com” chapter of this document.

The Extension Bar appears immediately under the Sharing Bar and contains fields that you can use to create associations. Keep in mind that the Extension Bar appears only for already shared e-mails, tasks, appointments and meetings; otherwise, the Extension Bar is not visible.

NOTE: Some CRM items are shared by default. These are Accounts, Leads, Opportunities, Cases, and Documents. For these items neither the Sharing Bar nor Extension Bar are displayed.
SalesBook

All Salesforce.com items are present in the Salesforce Book – the analog of your Address Book – where your personal contacts are located. Use the SalesBook to create an association with Salesforce object that has not been synchronized to your Microsoft Outlook. For example, when you need to create a new contact for an existing SalesDesktop account, which is not in your Outlook because it did not match your SalesDesktop synchronization filter. In this case, you can search for that account on the Salesforce.com and synchronize that one account to Outlook without changing your synchronization filter.

1. In the Contact, Account, Lead or Opportunity form, click the SalesBook button located next to the field you want to add the record into.

2. In the SalesDesktop – SalesBook dialog box, type name or find the item in the list, and double-click on it or click OK button to add selected item to the form.

3. If you can not find the record in the list, click Search in Salesforce.com button to open SalesDesktop – online SalesBook dialog box and search directly in the Salesforce.com. The SalesDesktop – online SalesBook looks almost the same as SalesDesktop – SalesBook dialog box, but it does not allow to create new records.

4. If you can not find the record in Salesforce.com, click New button to create a new record. The corresponding form will appear and you can specify all details of new record and save it.
Mail Processing

With SalesDesktop, you can attach e-mail messages and attachments to Salesforce.com items, manually or automatically. To attach an e-mail manually:

1. Select the message from the list in the Inbox folder and click the Save Mail button on the SalesDesktop ribbon. Also you can click this button in the Email form.

2. You can save the email to any record available in the list. Select a contact, a lead, a case, an account or an opportunity.

3. If there is no required item in the suggested list, click the Save Mail button to open the SalesDesktop – SalesBook dialog box.

4. Find the required item or create a new one. Outbound mail can be saved right before the send.

Save Emails Automatically

SalesDesktop can automatically save the email conversation with particular contacts to Salesforce.com. Enable the Save correspondence to Salesforce.com option in the Contact form to save all inbound and outbound messages for this contact automatically.

Include or Exclude Attachments and Embedded Images

SalesDesktop allows you to save emails to Salesforce.com with or without attachments and embedded images. By default, SalesDesktop does not include the attachments to the data be saved in the Salesforce.com e-mail. You can turn this option on in the SalesDesktop – Options dialog box.

1. Right-click on the SalesDesktop icon in the Windows task bar.

2. Select Options from the context menu.

3. Open the Advanced tab.

4. Select Include attachments option to save emails with attachments and check Exclude embedded images option to save emails without embedded images.

NOTE: The Exclude embedded images option becomes available after you have set the Include attachments option.
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Sharing Data with Salesforce.com

Work Offline

Working offline feature allows you to continue working on your SalesDesktop items in case there is no connection to Salesforce.com. For example, when you are traveling or there is no internet connection or it is very slow. Similar to working offline with emails, contacts, and calendar events in Microsoft Outlook without connection to the Exchange server.

Share New Items

SalesDesktop automatically share every Contact, Task or Calendar Event that is created in Outlook. To share these records automatically, configure corresponding settings in the First Run Assistant wizard that appears immediately after the installation. Later you’ll be able to change these settings in the SalesDesktop – Options dialog box.

Share Current Items

To share or unshare any specific Contact, Task or Calendar Event with Salesforce.com, use the Sharing Bar, which is located on top of the record form.

The Sharing Bar is grey if an item is not shared with Salesforce.com.

The Sharing Bar is green if an item becomes shared with Salesforce.com.

NOTE: In order to find the item you have shared on Salesforce.com, you have to launch the synchronization first.

Cancel Sharing

To stop sharing an item with Salesforce.com, click the green Sharing Bar in the record form. Stopping of sharing causes deletion of the record from Salesforce.com and the confirmative message appears:

At the next synchronization, you will be asked to confirm this deletion. Do not confirm it if you do not want to remove the item from Salesforce.com.

NOTE: To save your personal version of the item, create a copy and make sure that the record is not shared with Salesforce.com (the Sharing Bar is gray).

Send questions to support@invisiblecrm.com
Resolving Duplicates

Duplicate Contacts

In Outlook, if you try to save a contact with the same name or e-mail address as one that already exists, a dialog box appears with options to either create a duplicate contact or update the existing contact. Besides, if some details of a native Outlook contact is the same as details of the shared SalesDesktop contacts, these contacts are considered as duplicates. User can ignore these contacts or combine their details by using the Resolve Duplicates functionality in SalesDesktop.

Search for Duplicates

1. Open the Contacts folder in the Folder List.
2. In the Contacts window click the Search for Duplicates on the ribbon.
3. The Find Duplicates window appears.

Possible Actions in the Find Duplicates window

In the Find Duplicates window, after selecting the duplicate, you can perform the following:

1. Click the Compare and Merge button to open the Resolve Duplicates window.
2. Click the Remove from List button to remove selected duplicate from the list of found results.
3. Click the Export Duplicates button to export duplicates to the Excel file.
4. Click the Automerge Selected button to merge selected duplicates automatically.
5. Click the Automerge All button to merge all duplicates automatically. Alternatively, click the Automerge All button to copy values of all Outlook attributes to SalesDesktop simultaneously.

Manage Contact Duplicates

1. In the Find Duplicates window, choose a search criteria to detect duplicates. You can check contact duplicates by First Name, Last Name, Email, Address, and Phone.
2. Click the Find Duplicates button and wait until the matching records appear below.
3. In the list of duplicates, select the duplicate.
Resolving Duplicates (cont.)

Resolve Duplicates Window

When you click the Compare and Merge button in the Find Duplicates window, the Resolve Duplicates window appears.

In the Resolve Duplicates window you can copy the values automatically, to do this, select one of the following options:

- Select the Merge Contacts and Keep Native Contact option to merge the Outlook and Salesforce.com contacts, and to keep the Outlook contact.
- Select the Merge Contacts and Remove Native Contact option to merge the duplicated contacts and to remove the native Outlook contact.
- Select Keep Both Records (Do Not Merge) option to discard merging these duplicates and keep both records.

Before merging the values of native and Salesforce.com contacts, you can click the Modify Merged Contact button in the Resolve Duplicates window and change contact details, if required.

Use the Previous and the Next buttons to switch between found duplicated contacts.

Click the Close and Apply Changes button to copy selected values to the merged contact and close the Resolve Duplicates window.

This window consists of three panels showing:

- Attributes of Native Outlook contact;
- Attributes of the merged contact;
- Salesforce.com contact attributes.

You can manually select an attributes of the original Outlook contact or of the Salesforce.com contact, which should be copied to the merged contact, use an arrow buttons to copy the value of this attribute to the merged contact.
What is a Synchronization Issue

A situation may happen when you have permission to perform some actions in Microsoft Outlook, but do not have permission to perform same tasks within SalesDesktop.

If such a conflict occurs, then synchronization issues are detected with the following outcomes:

One or more of the fields that is required for a new or modified Microsoft Outlook record is empty.

You do not have sufficient access rights to add, modify, or delete a record.

You move a record to another folder when you do not possess direct visibility to the record. Moving a record in Microsoft Outlook is considered a record deletion.

However, in SalesDesktop the record is not deleted because you do not possess the rights to delete it.

NOTE: Records that are currently opened in the Outlook form could not be synchronized. A warning about open form also is added to the Check Issues tab.

If a synchronization issue has occurred, your changes are not synchronized to Salesforce.com.

In some cases, you can manually resolve the problem that causes the synchronization issue. For example, you can fill in an empty field that is required by Salesforce.com for the record that SalesDesktop was not able to synchronize without the required field value, and rerun synchronization.

In some cases, synchronizing one more time will resolve the synchronization issue.

If you cannot resolve the issue by yourself, or an extra synchronization session does not fix the problem, please contact your company’s system administrator. A synchronization issue will exist until it is resolved.

Check Issues During Synchronization

To view a synchronization issue, proceed with the following steps:

To determine if a synchronization issue exists after synchronizing with Salesforce.com, hover your mouse cursor over the SalesDesktop application icon. A tooltip displaying issues will then appear.

Right-click the SalesDesktop icon in the system tray and select the Show Control Panel item in the menu. The Synchronization Control Panel opens on the Check Issues tab so that you are able to review details of the synchronization issues found.

Click the record to examine the issue details.

If possible, correct the problem that causes the synchronization issue and synchronize again.
A collision occurs during synchronization, if it is detected that the same item has been changed both on your computer and Salesforce.com since your last synchronization session.

When a collision is detected, the synchronization pauses and requires you to resolve the issues. The notification balloon appears in the Windows task bar. The SalesDesktop icon will have with the exclamation mark until all the conflicts are resolved.

Right-click the SalesDesktop icon in the notification area, and then click **Show Control Panel** or double-click on the notification balloon to open the **Synchronization Control Panel**.

To resolve a synchronization collision, double-click on the SalesDesktop icon in the Windows task bar to open the **Synchronization Control Panel** window with the Resolve Conflicts tab active:

1. To resolve **all conflicts** without viewing the conflicting fields, click the SalesDesktop overwrites button to overwrite all conflicting fields with values from SalesDesktop or click Salesforce.com overwrites to overwrite all conflicting fields with values from the Salesforce.com.

2. To resolve **a single conflict** after viewing the conflicting fields, select the record that is in the conflict state.

3. Then check SalesDesktop values or Salesforce.com values option.

4. To resolve the **conflict for each field**, choose the value either in the SalesDesktop or in the Salesforce.com column. The value you have chosen overrites the value in the conflicting field.

5. Click the Synchronize Now! button to start synchronization.

**NOTE:** It is recommended that you run synchronization when the conflicts are resolved. SalesDesktop does not apply your resolutions to Salesforce.com records until the next synchronization. If you do not perform synchronization, then additional collisions might occur when other users change data.
Sending Feedback

We, at InvisibleCRM value our customers, therefore please let us know if you experience any inconvenience with the application. We also welcome comments or suggestions on how to enhance the product. Please use Feedback form in Option dialog. When informing us about the problem, we kindly ask you to attach the log to your feedback that allows our team to pinpoint the possible reasons for the issue.

**NOTE:** The data collected in this form will be used strictly for solving technical issues. No personal information will be recorded and sent out to invisibleCRM.

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Send questions to support@invisiblecrm.com