Mobile@Connector for Salesforce.com

Provided by: Logotec Engineering

User's Manual
Version 2.0

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Logotec Mobile@Connector for Salesforce.com

General information

Overview

Mobile@Connector for Salesforce.com provides mobile handheld access to your Salesforce.com data. It is **not** a browser-based solution – your data is stored at your mobile device, you may work offline and synchronize at any time you wish.

The solution is developed for Windows Mobile devices, including Pocket PC Phone Edition and Smartphones. It uses Logotec Engineering's award winning-technology to harness the full potential of the devices to provide a robust, yet easy to use and affordable mobile experience for Salesforce.com users.

The solution is offered in the SaaS (Software as a Service) model:

- **Nothing** needs to be installed in your location
- Your data stays at the Salesforce.com server – it doesn't need to be moved to Logotec's server
- Logotec service only creates you mobile solution, and intermediates between your mobile device and your Salesforce.com server while synchronizing.

Logotec offers the service using different servers located in different locations so the users can freely decide which server they wish to use.

The solution supports the standard Salesforce.com functionality, and also the full range of customization specific for a given user (custom objects, specific form design etc.). It is important to notice that the user specific customization is included automatically – there is no need for manual customization (even that it is also possible).
It actually means that the service always creates individual solution for every user. The process is fully automatic and takes only about 15 minutes.

Important:

Using Logotec's service, you can decide to mobilize your whole Salesforce.com, or only a part of it.

The solution supports all (and only) Windows Mobile devices, including Pocket PC Phone Edition and Smartphones. It uses Logotec Engineering's award-winning technology to harness the full potential of the devices to provide a robust, yet easy to use and affordable, mobile experience for Salesforce.com users.

The access to your Salesforce.com calendar and to-do list is provided with the standard and very convenient to use Pocket PC tools (Calendar, Tasks). As you would expect, the data are still synchronized with your Salesforce.com account.

Salesforce.com editions

Mobile@Connector for Salesforce.com supports all Salesforce.com versions except Group Edition.

Supported devices

Theoretically all Windows Mobile devices are supported:

- Pocket PC (Windows Mobile 6.5/6.1/6.0/5.0)
- Pocket PC Phone Edition (Windows Mobile 6.5/6.1/6.0/5.0).
- Smartphones (Windows Mobile 6.5/6.1/6.0)

Including your individual customization automatically - limitations

As already mentioned, Logotec's service fully automatically includes your individual customization. However, as always, there are some limitations to this process.
Following customization will be included automatically:

- Access rights – the users will only see objects/information which they have right to access
- Design (forms' design like fields' label, location etc., objects names and visibility in menu/navigator, etc.)
- Fields' changes (added/deleted/modified fields and their properties)
- Objects' changes (objects added, deleted, or modified)

Following customization will not be included automatically:

- Server-side changes performed beyond Salesforce.com (for example plug-ins written in C#, C++, Visual Basic etc.)
- Client-side changes like JVScripts, iFrames etc.(please remember: Windows Mobile Devices and "big" Windows computers are not compatible on the JVScript level)

Important:

- *In 99% of cases, when some customizations cannot be automatically included, the mobile application can still be created and used (even if some functionality will not work).*
- *Even if such changes cannot be included automatically, they usually can be easily added manually, so in such cases please contact us.*
- *In case you use not "just" a customized Salesforce.com but a specific, vertical solution based on Salesforce.com and extended with a lot of specific extensions and plug-ins developed **beyond** Salesforce.com, please contact us. We continuously work with several producers of such verticals to extend the use of our mobile solution.*

Acquiring the Mobile@Connector for Salesforce.com account

Important

- *To use our mobilization service, there is no need to install anything on your servers – our service contacts your server fully remotely*
- *When you use our mobilization service, your data stay on your server – there are not moved to our service. The service is only used for creating your mobile solution and for the synchronization (it intermediates between your mobile device and your Salesforce.com server)*
- *To use your trial or the full version, you will have to enter your Salesforce.com account and password. We store your Salesforce.com account name in our system, but we do NOT store your password – the password is just forwarded to the Salesforce.com (encrypted).To be able to register, you will have to have a proper Salesforce.com account. It is not necessary if you just want to use the demo account*

You can select between 3 kinds of accounts:

- Demonstration (Demo) account – you can download a demo application with Salesforce.com demo data to your mobile device, and use it (**only read-only – no synchronization possible**).
- Trial account – you can have (free of charge) mobile access to your own Salesforce.com data without any functional limitations for 30 days. You can use for it your mobile device. **Nothing** needs to be installed at your server.
- Full version. Neither in this case anything needs to be installed at your server.

Procedures for the Demonstration (Demo) version

To register for the "Demo account", it is not necessary to have any Salesforce.com account. Simply:

1. go to www.MobileConnector.com/Salesforce, select the option "Demo" and register there (be sure to enter your proper email address, since it will be used for notifying you);
2. our system will give you the possibility to work with the demo account while using your mobile device.

Important:

- *You will not be able to change or synchronize your data – the demo application is read-only.*
- *You can use the demo application as long as you wish.*

Procedures for the Trial version or the Full version

You will be able to use the Trial version or the Full version only if you have a Salesforce.com account. Nothing needs to be installed at your server.

Important:

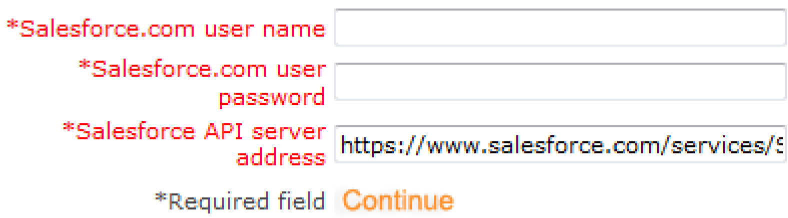
At http://www.mobileconnector.com/salesforce/Movies.aspx you can find three short movies demonstrating:

- ***how to create your solution***
- ***how to download it and install***
- ***how to use your mobile solution***

To register for the Trial or Full versions, simply:

1. go to www.MobileConnector.com/Salesforce.com, select the option “Trial” or “Buy”, and register there (be sure to enter your proper email address, since it will be used for notifying you);

   - You will be asked to enter your Salesforce.com account and password. We do not store your Salesforce.com password in our system – we just forward it (encrypted) to Salesforce.com to identify your account.



2. the service will connect to your Salesforce.com account, and display the list of Salesforce.com objects of your mobile application. You can decide which objects have to be included into your mobile application – you can decide to include all objects or only the selected ones. You will find more information in the chapter **“**Customizing Your Application”, under “[Objects contained in your mobile application”](#)

Important:

As you for sure know, always when you try to access your Salesforce.com account from a new location (with your computer having a new IP address), you need a special authorization from salesforce.com. For more information see: http://www.salesforce.com/us/developer/docs/api/Content/sforce_api_concepts_security.htm

When you are trying to use Logotec’s mobilization service for the first time, your access will be refused – you need first to authorize Logotec’s server to access your account. You can do it using one of 2 methods:

- **If you have administrative rights for your salesforce.com account:**
  - Log-in onto your salesforce.com,
  - select the “Setup” option
  - go to “Security Controls” in the “Administration Setup” panel
  - click the “Network Access” option
  - select the “New” option
  - enter 195.94.209.53 as the Start IP Address and 195.94.209.54 as the End IP Address
  - save your settings

  After you do it, any user from your company will be able to use the Logotec’s service without additional efforts
- **If you don’t have administrative rights for your salesforce.com account:**
  - Log-in onto your salesforce.com,

- select the "Setup" option
- go to "My Personal Information" in the "Personal Setup" panel
- click the "Reset My Security Token" option
- wait for the email from salesforce.com containing your new security token
- **while login to the Logotec's service, enter the received security token directly after your password (with no empty space between)**

Important: you need to enter the security token after your password only when you are log in to the Logotec's server for the first time.

3. After you login, the service analyzes your Salesforce.com acccount. The process usually takes several minutes, and depends on the complexity of your customization and the speed of the Internet connection.
4. The service tries to mobilize your Salesforce.com account fully automatically, without involving you into the process. The strategy is to mobilize 100% of your "large" Salesforce.com, and to download all available data. **You will be involved by the service only when the amount of available data in your CRM exceeds the set limits or recommendations**
   Of course, you can always use the "Advanced" option, if you wish to influence the process more deeply. You can then decide to limit the functionality only to specific modules/objects, or influence the data to be downloaded. For more information, see the chapter "The service – advanced settings".

Important: the trial version offers practically same functionality as the full version. The only difference is that while using the trial version, you create the solution only for yourself, but while using the full version, you can create a solution for several people in one step.

5. After you make your decision regarding the configuration, you can (but not have to) enter the phone number of your Windows Mobile device.

6. Thereafter, the system will create your specific mobile application. The application will include the customization you performed in Salesforce.com, and will also reflect the customizing parameters you set at the customization site. The process will take about 15 minutes. The system will send you an email informing you of the URL of your mobile application - the email will also contain all information necessary to use your application. If you enter the phone number of your mobile device, the system will also send you an SMS with the link to your application. If you click the link the system will automatically download and install your mobile application and your data on your mobile device (you can find more information in the chapter "Starting your mobile application for the first time").

7. instead of using the SMS, you also can connect to the URL using the a browser on your mobile device. If you do it, the system will (exactly as when using the SMS) automatically download and install your mobile application and your data on your mobile device (you can find more information in the chapter "Starting your mobile application for the first time"). You can

8. the service will also send you an additional email informing you about the URL of your customization site, the access key and the access password to this site. You can use this site any time you wish, to modify your mobile application or to create a new version of your mobile application. You will find more information in the chapter "Customizing your application"

   You will be able to use the application offline and also synchronize your local data with your Salesforce.com account (in both directions). If you have selected the trial version, your use will be limited to 30 days. You will find more information in the chapter "Using your mobile application"

Important:

- ***You can always change your mind, and change your customization. You will find more information in the chapter "Re-customizing Your Application"***
- ***Any time you change your Salesforce.com account you HAVE to go to your customization site and re-create your mobile application (the newly created mobile application will reflect all the changes you made in your Salesforce.com)***

Customizing your application

If you have customized the standard Salesforce.com functionality such as custom objects, forms, etc., it will be automatically reflected in your mobile solution.
However, Salesforce.com is a large application which could drive any mobile device at its limits, or could be confusing for some users. Due to this reason, several users prefer to limit the functionality/amount of data.

The service offers it in two forms:

- You can limit the functionality – you can define which objects (Leads, Accounts, etc.) should be included in your mobile application
- You can define which records of the objects included in the local database should be downloaded (how many, how old, created, modified or owned by yourself only etc.).

If the possibilities described in this documentation are not enough for you, ask for "Extended account".

Objects contained in your mobile application

You can define which objects (Leads, Accounts, etc.) should be included, and which excluded from your mobile application.
By default all objects are included.

Limiting the records to be downloaded

Due to several reasons, it may not be possible or reasonable to store all your Salesforce.com data locally on your mobile device. In such situation, you can define what subset of your data should be stored on your mobile device. You can define which records of the given object should be downloaded to the local database (individually for any object included to the local database).

How to customize your application?

You can customize your application by accessing your individual customization site. This site will be displayed to you during the process of the registering for the service. However, you can access the site at any time later to re-configure your mobile solution. The link to that site is contained in the email which you will receive after registering for an account (either the trial or the real account). You will find more information in the chapter "Re-customizing Your Application".

Note:

- **the customization is not enabled for the demonstration – demo – account**

After you login to the service, you have to wait for a few minutes – thereafter the system will display a site containing the objects' list of your "large" Salesforce.com application.

Now you will be able to define your mobile application.

Your Salesforce.com applications: Sales
Force users to use safe connection only (https): ☑
Encrypt data on mobile device: ☑
Name of your mobile application: Sales
The language of your mobile application: English

Object list

Object type name	Include in your application	Include in the local database	Only objects owned yourself (if applicable)	Only objects created yourself	Only objects modified yourself	Only records created during last XYZ days	Maximum amount of records in the local database [the limitation is 5000 , or 500 for events/tasks]	The number of records in the local database	Status
Account	☑	☑	☑	☐	☐	Not used for filtering	2000	39	In the local database
Contact	☑	☑	☑	☐	☐	Not used for filtering	2000	59	In the local database
Opportunity	☑	☑	☑	☐	☐	Not used for filtering	2000	49	In the local database
Campaign	☑	☑	☑	☐	☐	Not used for filtering	2000	13	In the local database
Contract	☑	☑	☑	☐	☐	Not used for filtering	2000	11	In the local database
Case	☑	☑	☑	☐	☐	Not used for filtering	2000	82	In the local database
Solution	☑	☑	☑	☐	☐	Not used for filtering	2000	19	In the local database
Product2	☑	☑	☑	☐	☐	Not used for filtering	2000	25	In the local database
Document	☐	☐	☐	☐	☐	Not used for filtering	2000	14	In the local database
Visit__c	☑	☑	☑	☐	☐	Not used for filtering	2000	14	In the local database
Lead	☑	☑	☑	☐	☐	Not used for filtering	2000	54	In the local database
Application__c	☑	☑	☑	☐	☐	Not used for filtering	2000	9	In the local database
testc__c	☑	☑	☑	☐	☐	Not used for filtering	2000	18	In the local database
Orders__c	☑	☑	☑	☐	☐	Not used for filtering	2000	6	In the local database
Event	☑	☑	☑	☐	☐	Not used for filtering	200	3	In the local database
Integrate events with Pocket Calendar			☐						
Task	☑	☑	☑	☐	☐	Not used for filtering	200	62	In the local database
Integrate tasks with Task Manager			☐						

The first field gives you the possibility to select which of your Salesforce.com applications has to be mobilized.
The second field allows you to decide if the user have or only can use https.
The third field allows you to decide if the data in the local database have to be encrypted or not (the encryption makes your application working slightly slower).
The fourth field contains the name of your mobile application, which will appear at the start site of your application. By default the system uses the name "Sales" and then a number, but you can modify the name accordingly.

Important: the name of the application is also an identifier of the application – due to this reason Mobile@Connector extends the name with numbers like "1, "2", etc., if the name you have chosen already exists.

Since your handheld mobile device has limited amount of memory, it may not be possible to store all your Salesforce.com data locally on your mobile device. You can therefore select a subset of your data, which should be stored on your mobile device. You can define which records of a given object should be downloaded to the local database (individually, for any object included in the local database).

For each object you can define:

- Whether the system should download only data created by yourself (owner by default), or all data to which you have access in Salesforce.com.
- The maximum number of the records which can be downloaded (NOTE: not more than 5,000 records of any object type is possible, 2,000 is the default setting)
- The "age" of data that should be downloaded (for example: "Only Leads from last 90 days").

Note:

There are also several objects used in the Salesforce.com not represented clearly in the Salesforce.com objects navigation structure. Due to this reason, they cannot be found in the service's objects structure. In such case the limit is set internally to 15.000 records – you cannot influence the setting.

Administrating the application users

This chapter explains how you can use the Mobile@Connector platform to manage mobile access for several users.

Important: the functionality described in this chapter is available only if you have a full (paid) account. If you are using the Trial account, the functionality will be read-only (you will be able to see the information but you will not be able to use it).

When you create a mobile version of your Salesforce.com application, several scenarios are possible:

1. Your Salesforce.com account, used for log-in to the Mobile@Connector service, does not have access to the Salesforce.com “Profile” object (user management)
2. Your Salesforce.com account used for log-in to the Mobile@Connector service:
   - can access the information in your Salesforce.com “Profile” object,
   - only one profile is defined,
   - and only one language is used
3. Your Salesforce.com account used for log-in to the Mobile@Connector service:
   - can access the information in your Salesforce.com “Profile” object,
   - more than one profile is defined,
   - or only one profile is defined but more than one language is used

Below, each scenario is explained further:

Situation 1:
If your Salesforce.com account does not have access to the Salesforce.com Profile object, only you can use the created application. Even if such a profile exists, and even if there are users assigned to this profile, the system isn’t able to access any information regarding the profile and its users.

Situation 2:
If your account has access to the Salesforce.com Profile object, and only one profile is defined, and all users from the profile use the same language version, you will see the user list of the profile, and you can decide which users have the right to use the application. Once defined, the created application can directly be used by the selected users, and the system will automatically notify them by email, that the application is created, and how it can be used. If you wish, you can also add a custom message to this standard, notification email.

This application can be used not only by the current user, but also by all users from the System Administrator salesforce.com profile. Decide, please, which users should have right to use this mobile application.

	User name	Permission to use the application
Select users from your profile	dryndos@logotecengineering.com	☑
	krzewinski@logotec.pl	☐

After you configure your application all users from your profile selected above will be notified by email. The email will contain the link to the application, the link to the user manual, and additional, useful information. If you wish to add a small message to this email (max. 512 characters) type the message bellow:

Situation 3:
If your account has access to the Salesforce.com Profile object, and more than one profile is defined in the system, or only one profile is defined but more than one language version of Salesforce.com is used, the system will initially behave exactly as in the case of a single profile: you will be able to configure your application, you will see the user list from your profile, and you will be able to decide which user(s) can use the application. The users, as in the Situation 2 above, will be notified by email.

Additionally the system displays a list of all profiles, and you can then decide which profiles can have mobile access to their Salesforce.com accounts.

Important: If for a given profile multiple languages are used by the users, the system will divide the profile in as many profiles as there are languages used.

You will see the user list for every selected profile. You have to decide which users from the given profile should have mobile access to Salesforce.com. You also have to select at least one user from every group, who should have the necessary rights to configure the application. You can also decide if they can modify the list of users which can use the application or not.

After you decide the above for every profile, and “Creating application”, the system will notify by email users responsible for configuring the application, that they can go to the configuration site and can configure their applications. Once completed, the system will notify by email all mobile-designated users, from the given profile, that the application is ready and can be used, and provide the necessary instructions.

Starting your mobile application for the first time

Important: you can use any kind of connection while working with your mobile application. However, if you are using it for the first time, a big amount of data will be downloaded: the local database, the local part of the application and all data you need locally. Due to that reason, consider using a fast and not expensive connection if you start the application for the first time.

1. If you have entered the phone number of your Windows Mobile device while defining the application in Logotec service, the service sends you an SMS with the link to the application. If you click the link, a default browser of your Windows Mobile device will be started and connected to the link. After the log-in site is displayed on your screen, the system informs you that you do not have a “Mobile@Connector client” installed on your local device, and then starts the installation process automatically - you have to accept it.
2. If you haven’t entered the phone number of your Windows Mobile device while using the service, you have to start a browser on your Windows Mobile device and enter the link to you mobile application (sent to you by email) manually – the process will be same in both situations.
3. After the installation is completed, Mobile@Connector client will be started automatically. If you don’t have Mobile Compact Framework version 3,5 installed on your Windows Mobile devices, the system will automatically start downloading and installing it.

Important:

If you are using an external memory card, you will be asked (during the installation process) where the Compact Framework has to be installed: On the external card, or in the main memory. Please, use only the main memory for installing Compact Framework!

4. After the installation is completed, close the browser and start Mobile@Connector client (Today screen → Programs → M@C). The system will display a window with the name of your mobile application (not the whole link, but only the name). You only have to click the “Connect” option.
5. The system will display the login site of your application – log-in using your Salesforce.com username and password.

Important:

- ***please reset your mobile device before connecting to the URL and be sure that you have at least 25 MB free memory.***
- ***the following description concerns installation on Windows Mobile 6.5/6.1/6.0 Professional and Classic devices. For differences concerning Windows Mobile 6.5/6.1/6.0 Standard and Windows mobile 5.0, see additional comments following the installation description.***

6. Thereafter the system automatically downloads the local part of the application to your local device. It usually takes 1-3 minutes – but only for this first time)

7. Thereafter the system starts preparing and downloading data you wished to store on your local. The process of initially downloading and saving data to your local data usually takes 5-20 minutes - the time depends on the amount of data, connection speed, and the "power" of your mobile device as well. After this process is completed, you can work offline (with thousand of local records saved on your local device) – and use data synchronization at any time you wish.

Important:

- *please reset your mobile device after downloading the local data*
- *If you encounter any problems while downloading your application/local data (such as losing the connection, problems with your device, etc.) you still can reset your device, start your application a second time (**after connecting to the Internet**) and the system will continue to download exactly from the point at which the download process was broken.*

Additional remarks concerning installation on devices older than Windows Mobile 6.0

All Windows Mobile 6.5/6.1/6.0 devices have Microsoft SQL Server Compact Edition already installed in ROM.
On Windows Mobile 5.0, Microsoft SQL Server Compact Edition is not installed.

Mobile@Connector for Microsoft Dynamics CRM recognizes the situation, and installs Microsoft SQL Server Compact Edition on those devices.

Important:

- *In the case of Windows Mobile 6.6, 6.1, 6.0 or 5.0 devices (except for Smartphones!) the installation of any component mentioned above (Compact Framework, Microsoft SQL Server Compact Edition, and Mobile@Connector client) starts automatically.*
- *In the case of Smartphones the installation of the components does not start automatically. You will only be informed that the specific component is not installed, and you have to start the process manually. To do it, move to the bottom part of the login site, and click the given link ("Install Compact Framework", Install Microsoft SQL Server Compact Edition", "Install Mobile@Connector client").*
- *Please reset your devices after installing Compact Framework or Microsoft SQL Server Compact Edition, and be sure that you have at least 25 MB free memory*

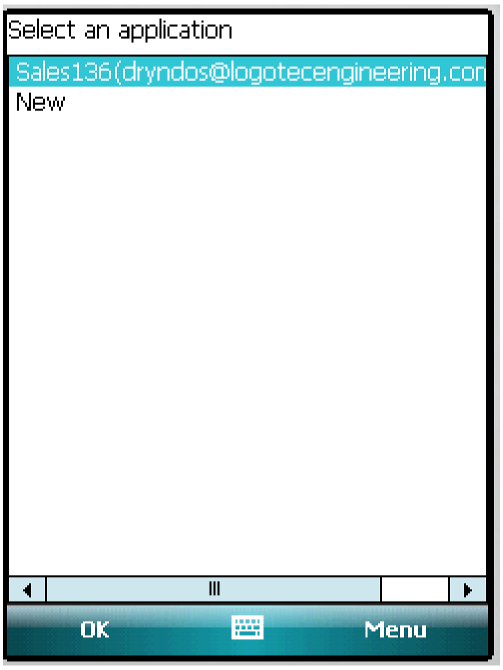
Using your mobile application

Starting your mobile application

After the application and your local data are downloaded to your local device, and after you reset your mobile device (**strongly recommended)**, you can start using your mobile application. After you go to Programs → M@C the system displays a screen with the list of your applications – just select your application from the list, and confirm the selection)

Important:

- *while downloading your solution for the first time, Mobile@Connector automatically creates an entry in "Favorites" of Pocket Explorer. Even that you will never use Mobile@Connector with Pocket Explorer (it is **not** a browser based solution), never delete the application from the favorite list – if you do it, Mobile@Connector will not be able to use your application (you will have to download it again)*



Using the stylus or the finger navigation

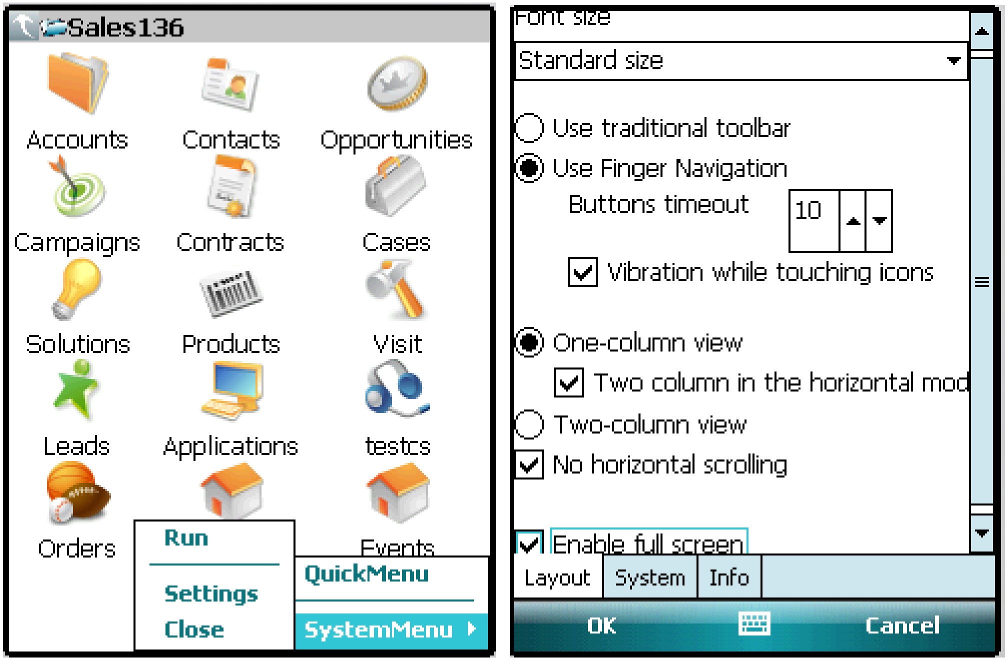
Mobile@Connector enables you to use one of two different navigation modes:

- you can navigate using the traditional toolbar and the stylus
- … or you can navigate using just finger movements

The finger navigation mode is mostly appreciated by people that mostly read information, and only seldom modify it.

For the people who are mostly entering data, the traditional toolbar mode is usually more preferable.

Which mode you want to use, is fully up to you – you can switch between the modes by going to SystemMenu → Settings.



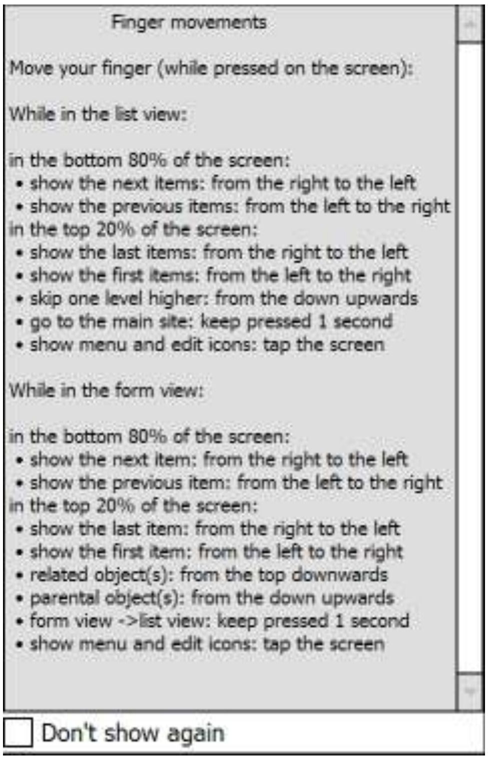
Using settings you can not only decide which navigation mode you want to use, but you also can make other settings.

This documentation is based on the finger navigation mode – the toolbar navigation is so obvious that, after knowing how to use the system by using the finger navigation, you will probably not need additional description. Nevertheless, if you need to, see the chapter "Stylus navigation".

The second mode (finger navigation) is the default mode, so after your application is started, the system displays information regarding possible finger movements.
Please read it carefully.

Important

- ***Even if you forget the finger movements, the information screen will always be shown after you make 3 wrong (unrecognizable), consecutive, finger gestures.***
- *You can also display the information at any time you wish by going to SystemMenu →Settings→ Info→ "Show finger movements".*

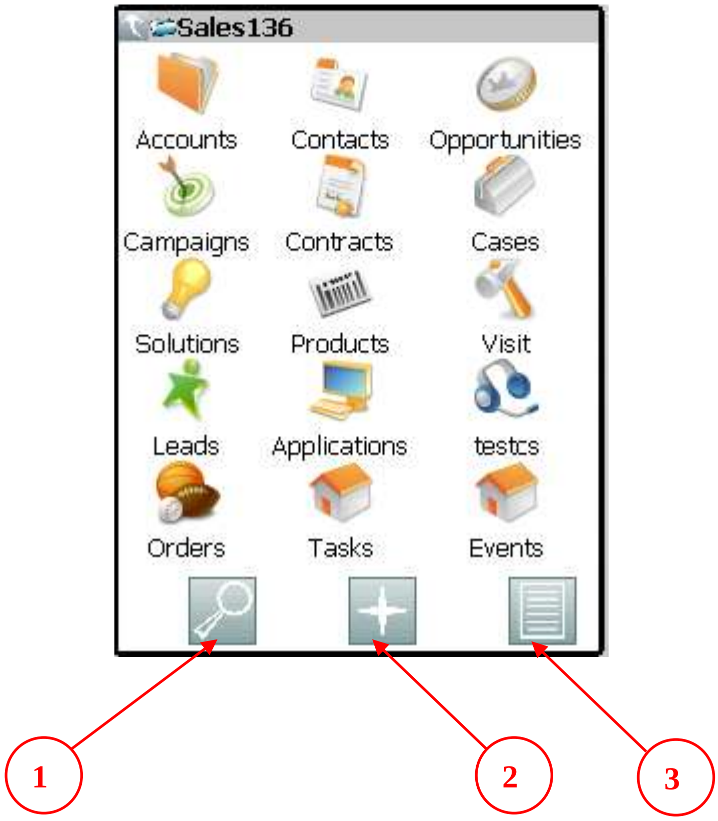


After you close the information page, the system will display the main site of the application. At the beginning, the site will only show the main objects of your CRM system. If you want to see available functions, tap the screen at any **empty** place – then the available icons will appear.

> *Note:*
> *The icons disappear after 10 seconds of inactivity, so if you cannot see them, just tap the screen with your finger at any* ***empty*** *place.*

The finger navigation has several advantages:

- The data can be displayed on the whole screen – there is no toolbar requiring the screen place. Even if, in some situations, icons appear (and disappear after 10 seconds of inactivity), they are translucent, so they do not cover data
- You can work using just one hand



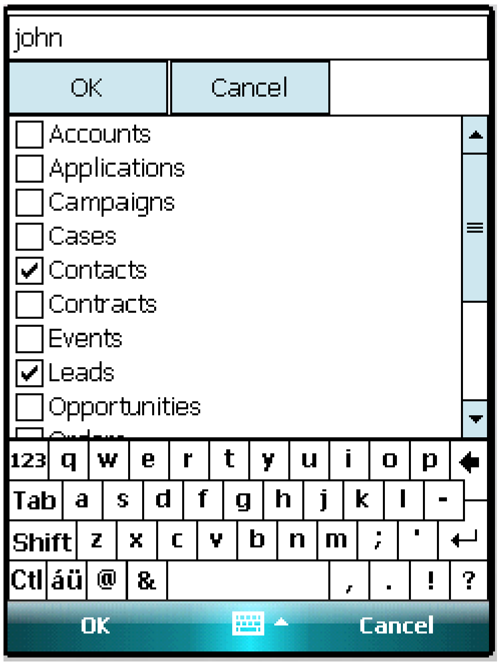
1 – Fast search
2 – Add new object
3 - Menu

You can now navigate through the application structure (you can find more information in the next chapters), but you also have possibilities to use two functions represented by two icons on the screen – "**Fast search**" and "**Add new object**".

Fast search 

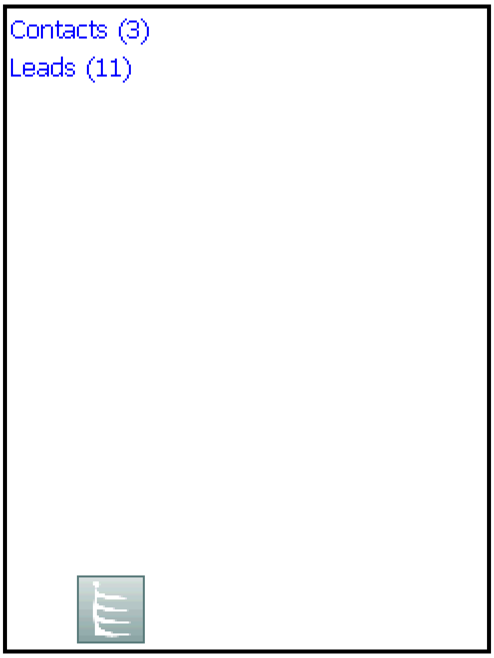
Using this function, you can find records from any object types (Leads, Accounts, Orders, etc.), containing searched text in specific text fields.
Which fields of specific objects have to be searched through is defined in your Salesforce.com implementation – the mobile solution is based on these settings.

If you tap this button, the system displays a screen where you can enter the searched text. It also displays the list of all objects' types of your Salesforce.com, and lets you decide which objects should be searched through.

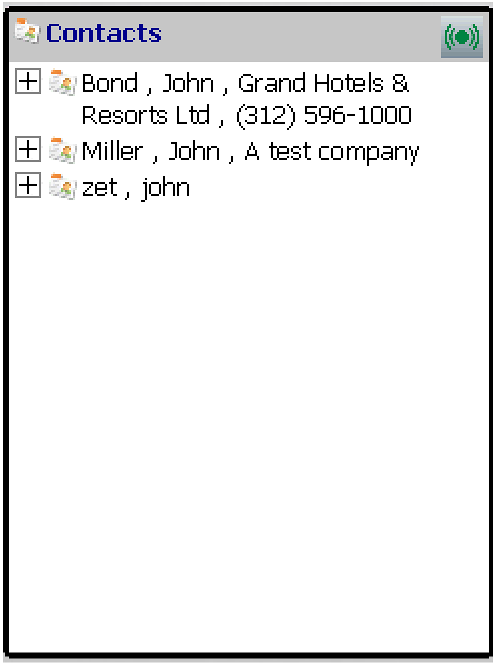


Enter, for example, "john" as a search criterion, and mark the following objects -„Contacts", and „Leads". Thereafter press the **OK** button.

After a while, the system will display a screen with information of how many records of the given type have been found.



Now tap the object you are interested in, and the system will display all records of the given objects that contain the searched word. If you click, for example, **Contacts**, you will see following screen.

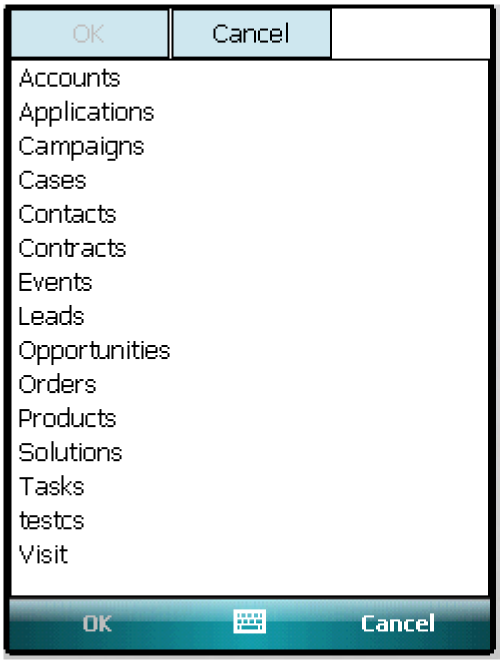


Important:

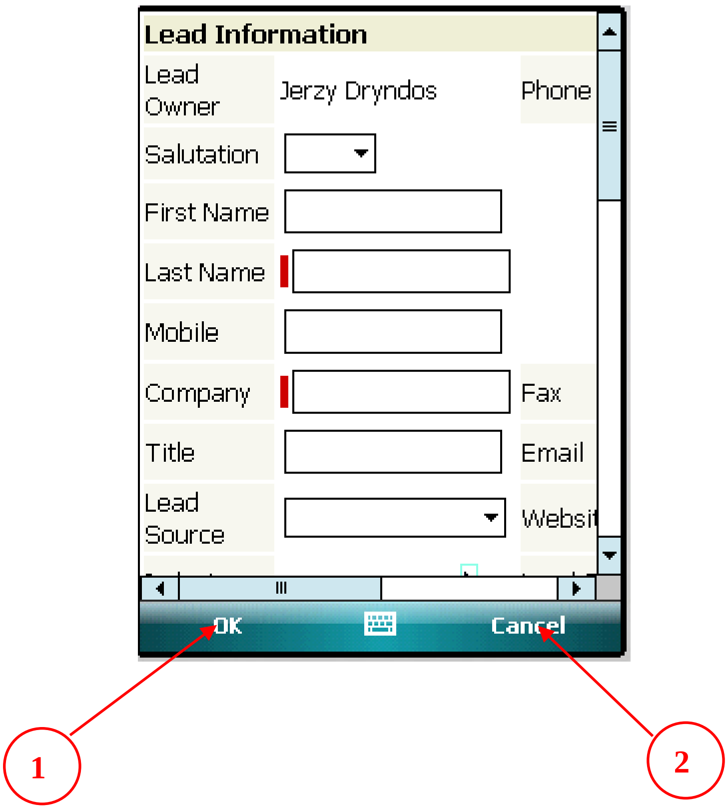
- *The search icon mentioned above (**) behaves differently if used in different parts of your mobile solution. For more information see the chapter related to searching*
- *You can search data while using more sophisticated methods. For more information see the chapter related to searching.*

Adding a new object

Using this function, you can add new records very fast and easily (Lead, Account, Order, etc.). If you push this button, the system displays a screen where you can select the desired object.



If you select, for example, “Leads”, the system displays, after a few seconds, a screen allowing you to register a new lead.



1 – Save **2 – Cancel**

After you enter the necessary information, push the "**Save"** button. The system will ask you to confirm saving the new record and displays the newly added record in the form view.

Recent objects

At the main site of your mobile solution you can see, additional to your typical objects from your large CRM, two additional objects: "Recent objects" and "Not synchronized".
Using the "Recent objects" function, you can easily switch to one of the last visited objects. "Recent objects" contains the list of 10 objects you recently "visited".

Not synchronized

Using the "Not synchronized" function, you can see the list of all objects which are not synchronized yet with the server. It contains objects that were edited, added, or deleted locally. The icons at the individual objects in the list represent the operations which were performed at them (edition, new object, deleted object).
You always can switch to the individual objects and modify the performed operation (of course, only as long as you not synchronize the changes with the server).

Information regarding smartphones

If you run the solution on a smartphone (Windows Mobile Standard – device without a stylus), you cannot use the finger navigation described in this document. Mobile@Connector recognizes such devices automatically, and – also automatically – switches to the “traditional” navigation. The “traditional” navigation means, in case of a “Pocket PC” (Windows Mobile Professional or Classic), navigation with a stylus. Smartphones use same kind of navigation but because they don’t support stylus, you have to navigate using the smartphone’s keyboard or joystick.

When you use the “standard” stylus navigation, the system displays a toolbar with a set of icons which – when pressed - start appropriate functions. The toolbar is located at the bottom part of the screen, and – if you need to call a function – you just click the appropriate icon with the stylus. Because smartphones don’t have stylus, you use joystick to navigate – when you use the joystick the cursor moves within the smartphones main screen, and never goes outside of it. So the question is: how to move the cursor to the toolbar?

Toolbar

Press to move the cursor to the toolbar

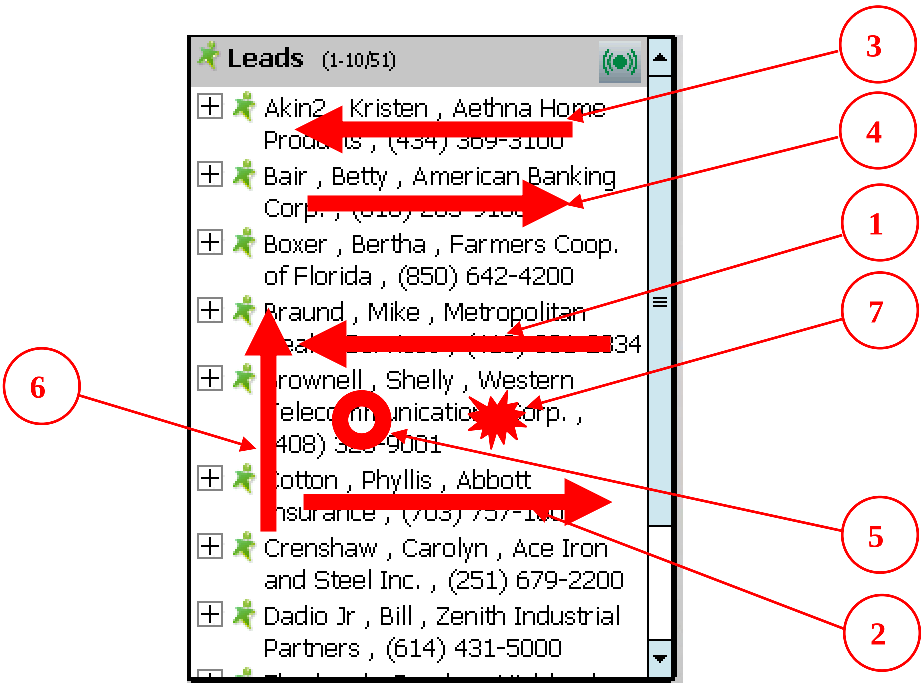
To move the cursor from the main screen to the toolbar, you have to press the left system button of the smartphone. After you do it, the cursor will move to the toolbar, and you can move it within the toolbar to the left or right. If you want to move the cursor back to the main screen, just move the cursor up. To bring him back to the toolbar press the left system button again.

Navigating your mobile application

If you want to see list of records of a specific objects (for example leads), just tap the icon.
The system displays at one site 10 records (you can modify it in settings)

List view

Possible finger movements in the list view



1. **if you want to go to the next 10 records, move your finger from the right to the left (use the bottom part of the screen – do not use the top 25%)**
2. **if you want to go to the previous 10 records, move your finger from the right to the left (use the bottom part of the screen – do not use the top 25%)**
3. **if you want to go to the first 10 records, move your finger from the left to the right, but use for it the top 25% part of the screen**
4. **if you want to go to the last 10 records, move your finger from the right to the left, but use for it the top 25% part of the screen**
5. **to see additional icons, tap the screen at any empty place**
6. **to skip to a level higher, move your finger from the down upwards**
7. **to come back to the main site, keep your finger pressed on the screen for at least one second**

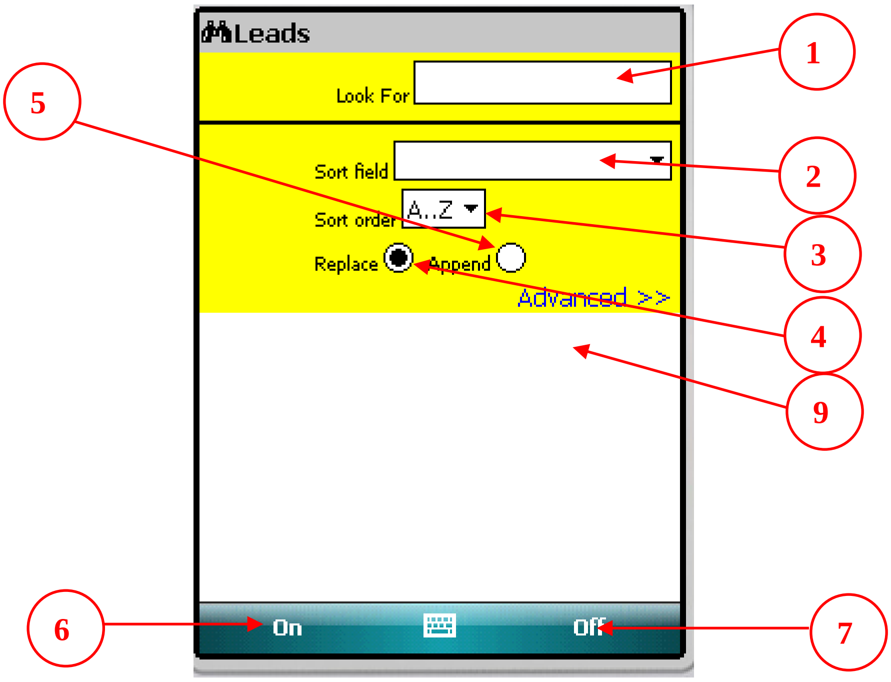
In the case of the finger movement from the point 6, the system will skip one level up in the structure. In the case of the finger movement from the point 7, it will always skip to the main site of the application. In our example, using any of the options will cause the same effect: you will be back at the main site.

Search

The same search icon that you already used for searching through several objects, behaves differently when you are in the list view: it allows you to search through just one (current) object type.

Search icon

*Note: remember: if you do not see the search icon, just tap your screen at any **empty** place.*



The elements on the screen above have the following functions:

1. **Searched text**
You can enter here the text to be searched. The system will look for all Leads containing this text in specific text fields at any place.
Which fields have to be searched through is defined in your Salesforce.com implementation – the mobile solution automatically uses these settings.

2. **Sort field**
You can select a field to be used for sorting the records

3. **Sort order**
You can decide if the records will be sorted in ascending or descending order

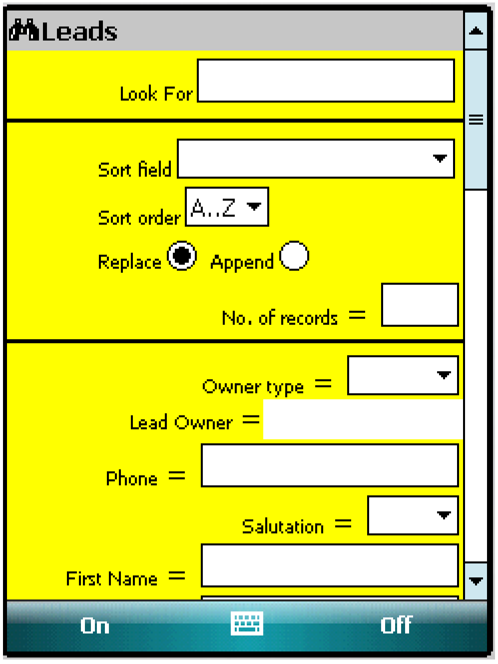
4. **“Replace” radio box**
If it is set to on, the new loaded data will replace the former data on the screen of your mobile device (you will see only the new data – the “old” data will disappear)

5. **“Append” radio box**
If it is set to on, the new loaded data will be added to the data displayed on your screen previously (you will see the former and the new data)

6. **“On” button – searching with the filter**
The system searches for the data using the filter definition.

7. **“Off” button – displaying data ignoring the filter**
The system will display data IGNORING the filter definition.

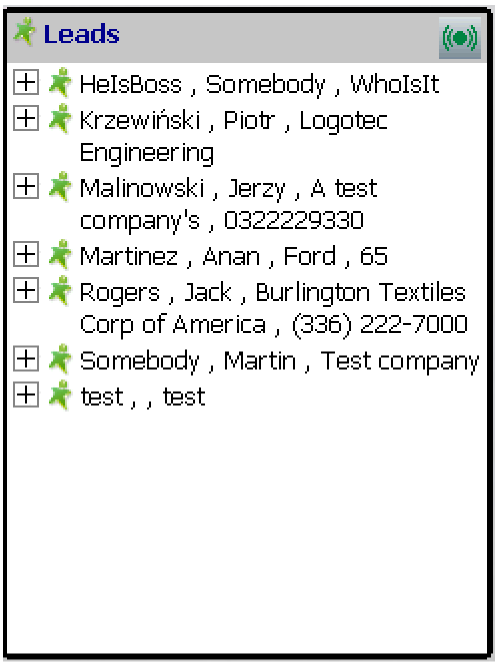
8. **Advanced**
It allows you to use more sophisticated search criterions – you can enter search criterions which have to be searched in specific fields



Note:

There is a difference between entering search criteria in the “Look for” field and in the specific fields in the “Advanced” option:

- *If you enter “john” in the “Look for” field, the system will, for example, find records with fields containing the sentence “a talked to John yesterday”*
- *To find it using the “Advanced” option, you will need to enter as the search criterion “*John*” instead.*



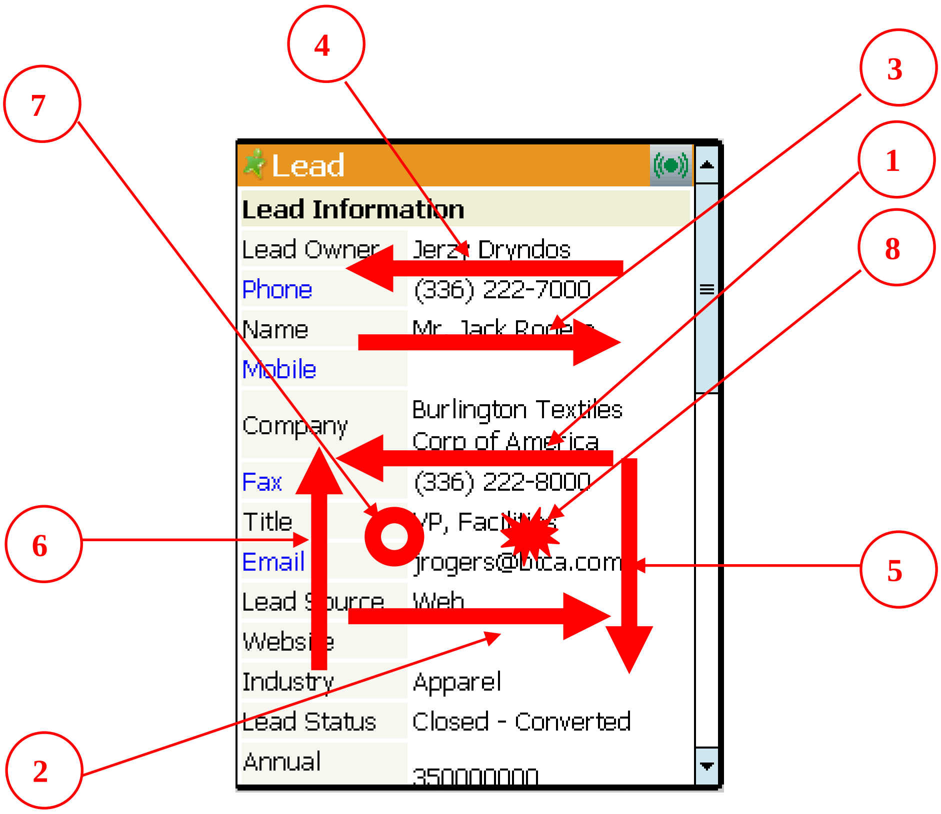
Note:

As you can see in the above screen, the names of the filtered objects ("Leads" in this case), are presented with the blue color (all other objects are presented in black). So you can directly see that items contained in such objects are filtered (not all items appear but just the filtered ones).
If you want to see all items again you have to go to the filter and push the "Off" button.

Form view

If you want to see the detailed information regarding a lead (or any other object) just tap the item – the system will switch to the form view.

Possible finger movements in the form view

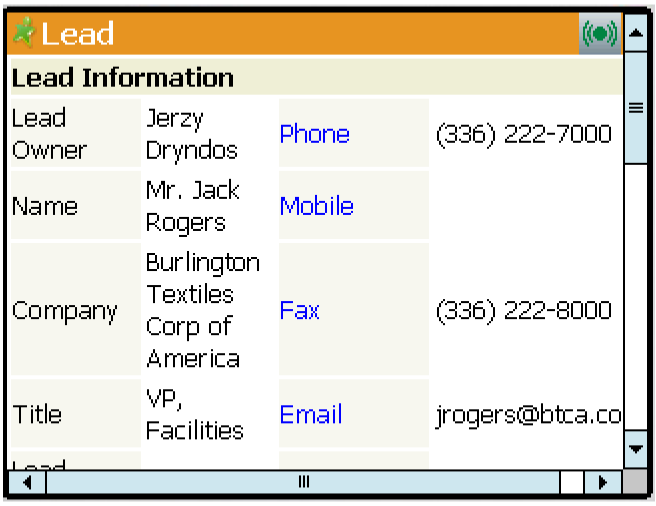


Possible finger movements in the form view:

1. **if you want to go to the next item, move your finger from the right to the left (use the bottom part of the screen – do not use the top 25%)**
2. **if you want to go to previous item, move your finger from the right to the left (use the bottom part of the screen – do not use the top 25%)**
3. **if you want to go to the first item, move your finger from the left to the right, but use for it the top 25% part of the screen**
4. **if you want to go to the last item, move your finger from the right to the left, but use for it the top 25% part of the screen**
5. **to see related objects, move your finger from the top downwards**
6. **to switch to the parental object, move your finger from the bottom upwards**
7. **to come back to the list view, keep your finger pressed on the screen for at least one second**
8. **to see additional icons, tap the screen at any empty place**

As you can see, the system displays data in one column, which usually makes more sense considering the small screen of mobile devices.

Nevertheless, if you switch to the horizontal mode, the data will be displayed in two columns – exactly as in your "large" Salesforce.com..



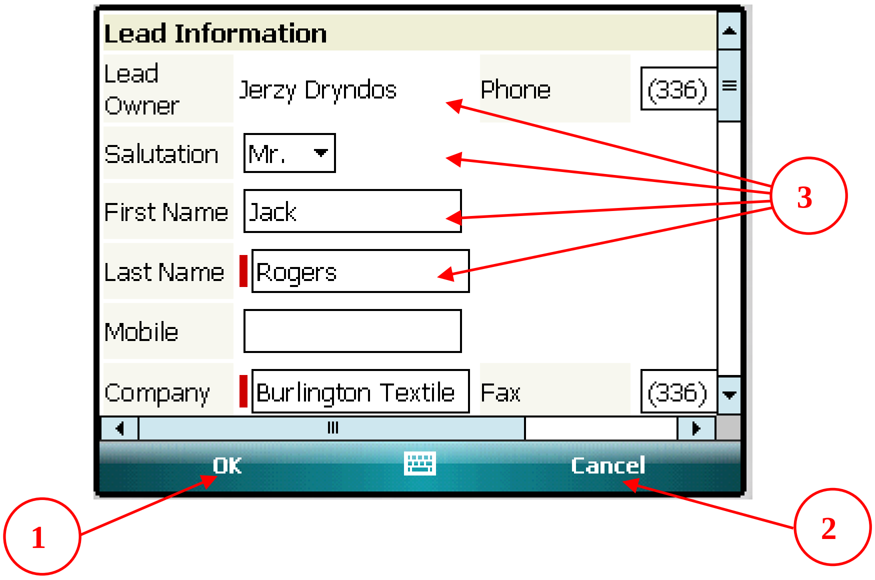
Note:

You can change it by changing your settings in SystemMenu →Settings.

If you want to come back to the list view, just keep your finger pressed on the screen for at least one second (movement 7).

Editing data

If you want to edit a record, use the edit icon.



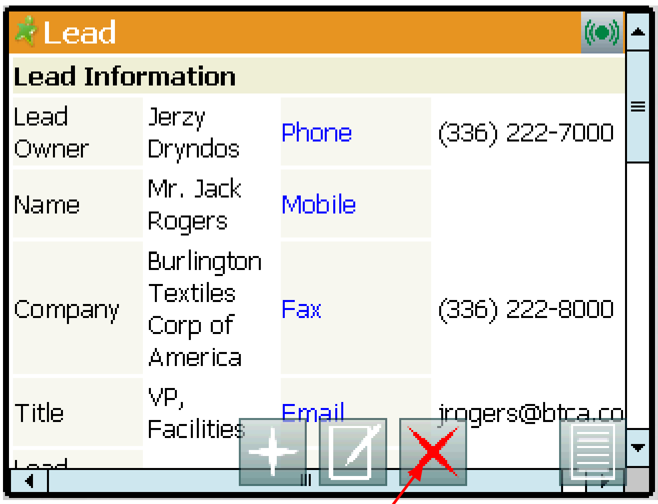
The elements in the screen above have following functions:

1. **Save**
   If you press this icon, all the changes you have made will be saved (locally)

2. **Cancel**
   If you press this icon, all your changes will be ignored (not saved)

3. **Fields of the current form**

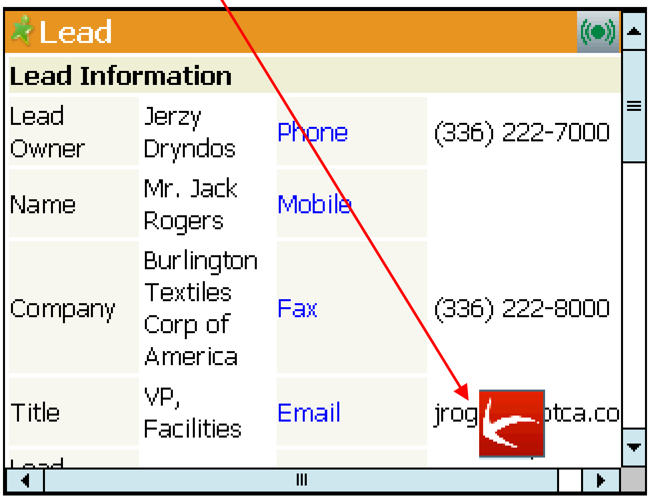
Deleting data



If you want to delete a record, use the delete icon.

Cancelling changes before synchronization

Remember, that all your changes are stored only locally – they will be sent to the server only during synchronization.
As long as you do not synchronize them, you can always change your mind, and cancel the operation by using the cancelation icon.



Synchronization

The synchronization can be divided into two parts:

- sending the local changes to the server
- searching for possible changes made on the Salesforce.com server, and downloading them to your mobile device

Sending the local changes to the server ("synchronization")

All the local changes are sent to the server in small packages. If there is a conflict, the system shows the objects for which the conflict occurred with the proper information (all other records – with no conflict – will be sent to the server).
Example of a conflict: you changed/deleted an object (record), but before you sent the changes to the server, another person changed/deleted that object (record) on the server. As a result the object you are sending to the server does not exist. In such a situation the system refuses to update the record and displays a proper message, proposing deleting the record locally.

Searching for possible changes done on the server ("actualization")

The system searches for possible changes done on the server:

- records which have been deleted
- records which have been added
- records which have been modified

… and downloads the changes to the local device:

- the records deleted on the server are deleted locally
- the added records are added to the local device
- the modified records replace the old records

Important: in the case of "deleted records" and "added records" the system not only looks for the records which have really been deleted/added but it also looks for records which do not fit to the specification of the local data anymore.

Example:

> ***If you have specified that your local database should contain your appointments from the last 30 days, then any time you synchronize, the system also checks for appointments which are older than 30 days and deletes such records from your local database. It also automatically adds all new appointments. As a result you will have on your local device only the newest leads from the last 30 days.***

Starting synchronization

You can start synchronization at any time you wish by just going to SystemMenu → Quick menu → Synchronization.

Sales136
Accounts
Contacts
Opportunities
Campaigns
Contracts
Cases
Solutions
Products
Visit
Leads
Applications
testcs
Orders
Tasks
Events

Accounts
Contacts
Opportunities
Campaigns
Contracts
Cases
Solutions
Products
Visit
Leads
Applications
testcs
Orders
Tasks
Events
QuickMenu
SystemMenu

Menu

Quick Menu
Synchronization (0)
Bidirectional
Local databases
Recent Objects
Not Synchronized
M@C client installation
Build: 2009.07.27.006
Install: 20090729155636

Important:

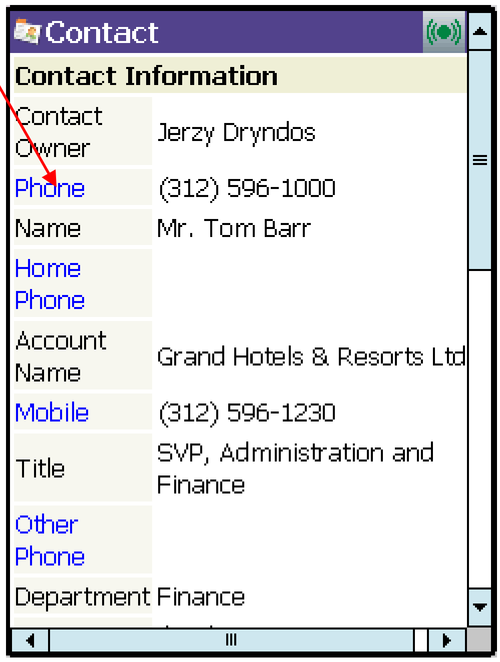
- *You can directly see at the "Synchronization" button, how many records are not synchronized yet*
- *If the "bidirectional" option is checked, the system will not only synchronize the data but also actualize it (see the above description). If you only want to synchronize your local changes with your CRM server, and you not have time for waiting for the actualization, please uncheck the "bidirectional" option before pressing the "Synchronization" button*

Additional functionality

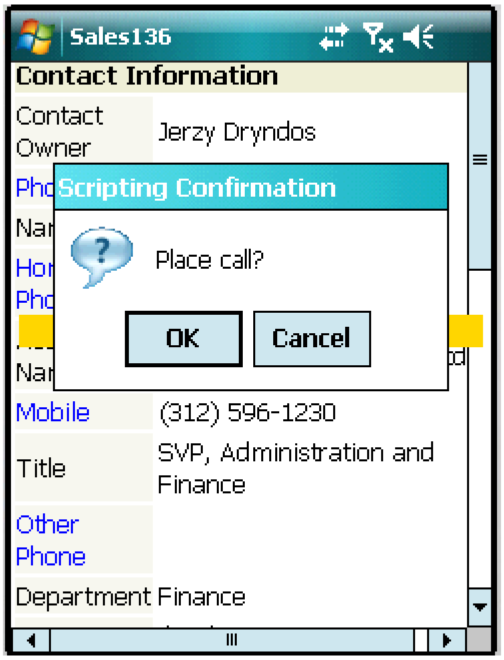
Placing a call

If you are working with your mobile application, and you want to call a person whose number is registered in your Salesforce.com, just do the following:

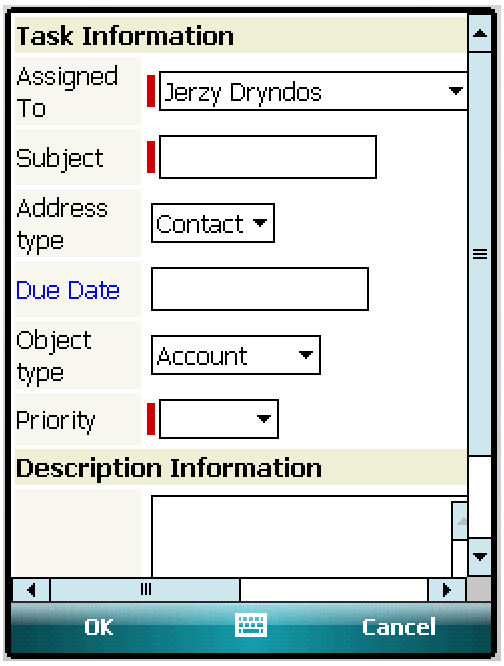
- find the object (Account, Contact, Lead)
- find the phone number on the screen
- click the link



At this moment, your mobile device will start dialing the number.
When you finish your phone call, and switch back to your mobile application, you will see the following screen – just confirm the question.



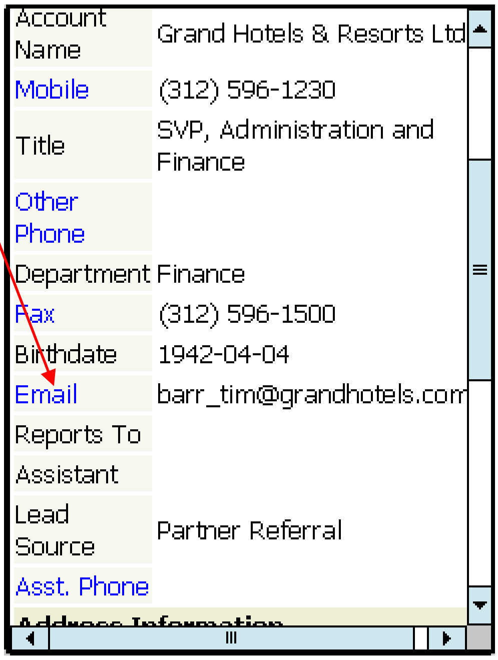
Within a few seconds, the system will create a new task that will already be filled out with the necessary data. Just enter the information about the call made, modify some values if necessary (for example the call duration, or associations with other objects), and save the task.



Placing an email

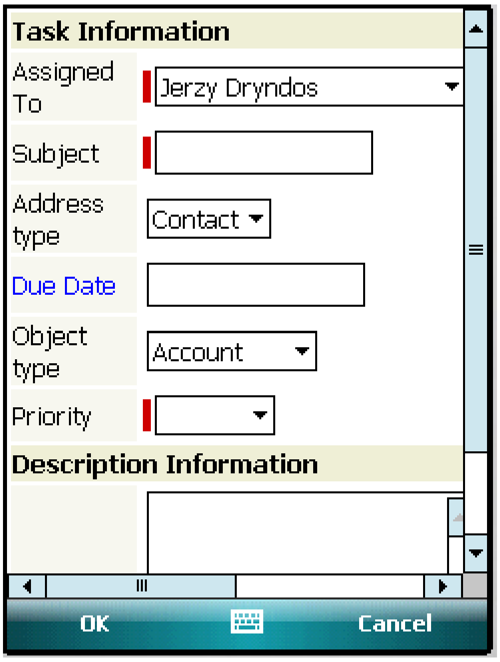
If you are working with your mobile application, and you want to send an email to a person whose email address is registered in your Salesforce.com, just do following:

- find the object (Account, Contact, Lead)
- find the email address on the screen
- click the link



Within a few seconds, the system will create a new task that will already be filled out with the necessary data. Just enter the topic and text of your email, modify, or extend some values if necessary (for example select additional persons for cc, or modify associations with other objects), and save the task.

Important:
After you do it, do not forget to answer the question “Send the email?”! If you forget to do it, select the “Send email” option from the menu.



Your email will be sent after you synchronize your data.

Integration with Pocket Calendar and Task Manager

General information

There are well known ways of integrating Salesforce.com objects like appointments, service activities, or tasks with appropriate objects from Microsoft Outlook or Pocket Outlook.
If you are using one of these methods, the only useful information in this chapter for you is: do not use the integration option offered by Logotec's service! If you turn on this option, then all your events and tasks will appear twice.

Nevertheless, there are several people who do not use these methods of integration between Salesforce.com and Microsoft Outlook Calendar or Tasks Manager. Even more people do not use such integration with Pocket Calendar or Task Manager, due to specific difficulties and limitations of such methods.

For all such people, the fully automatic and very sophisticated integration offered by Logotec's service can be a very useful option.

You can access the Events and Tasks objects in two different ways:

- You can use the navigator and the forms in your mobile applications (as with other objects)
- You can use the standard Pocket PC application: Pocket Calendar and Tasks Manager

Even while using Pocket Calendar and Tasks Manager as your main user interface, you still have the possibility to use the full functionality offered by Salesforce.com, as the standard Pocket PC applications and Salesforce.com are fully integrated.
For example, while creating an event, you are able to associate the event with Salesforce.com objects like WhoID (Leads/Contacts), WhatID (Opportunities, Products, Accounts, custom objects etc.). You can assign the event to Salesforce.com users, and also define attendees using the Salesforce.com objects like User, Contacts, Leads.
This functionality is not a functionality offered by Pocket Calendar but your mobile application extends its functionality with Salesforce.com functionality.

To be able to differentiate between the Salesforce.com events and other events, all Salesforce.com events have the assigned category "SALESFORCE". If you download the local data, the system:

- Deletes from your Pocket Calendar all events having the category SALESFORCE
- Inserts into your Pocket Calendar all Salesforce.com events you decided to include in your local database, and sets their category to "SALESFORCE"

Managing Salesforce.com activities

You do not need to do anything specific to be able to use Pocket Calendar/Tasks Manager for managing you Salesforce.com events or to-do lists. The system does all required steps fully automatically.

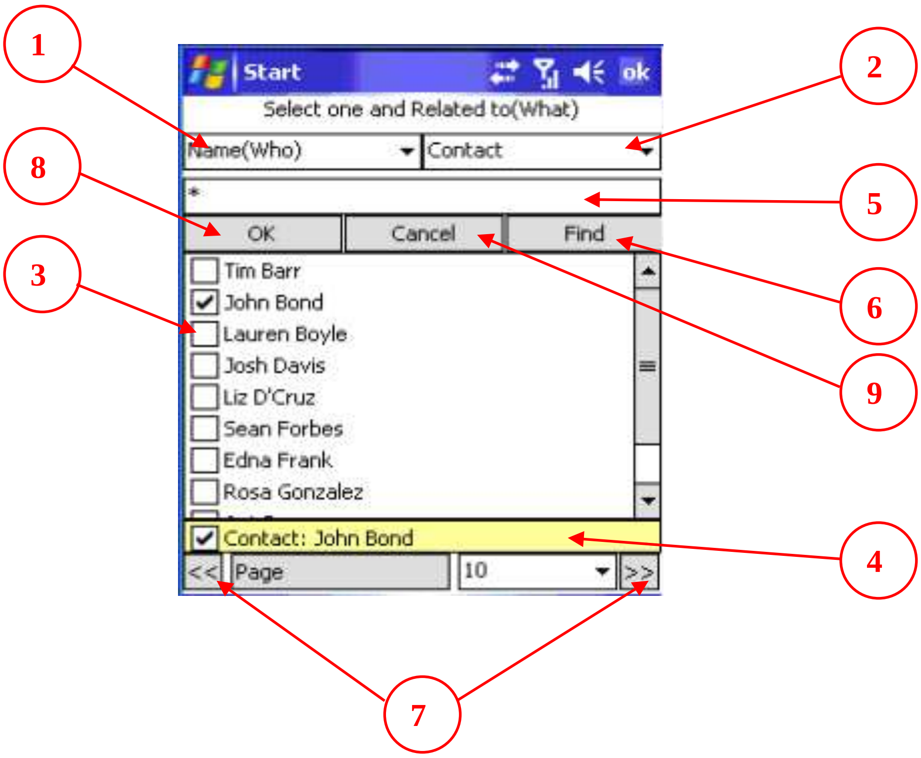
Creating a new event

To create an event in Salesforce.com, simply do exactly as you would to create any other event. There are only two differences:

- Do not define attendees

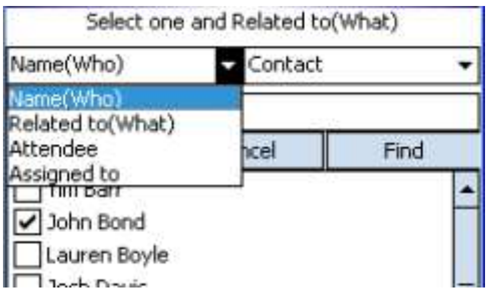
- Do not forget to set the events category to SALESFORCE

After you save the event, the system will display a window and allow you to select and associate the event with a Salesforce.com object.



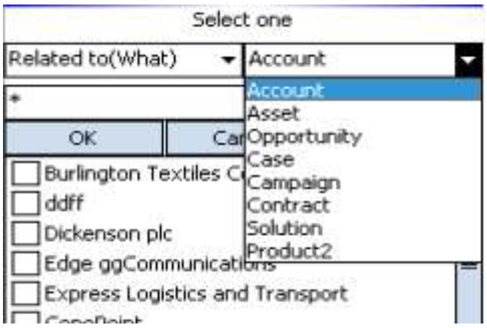
1. **List of operations**

You can decide with **Who**, or **What**, you wish to associate the event, select attendees, or assign the event to a Salesforce.com user.

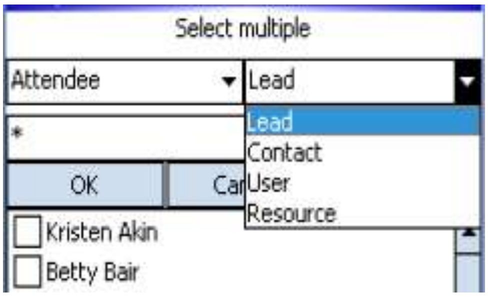


In the case of **Who,** you can select between a **Lead** and a **Contact.**

In the case of **What,** you can select between **Accounts**, **Assets** etc.



In the case of **Attendees,** you can select between a **Lead**, **Contact**, **User** and **Resource.**



2. **List of object types**

You can select between object types which you wish to have associated to the event. The list's content depends on the selected operation.

3. **List of object types records**

When you select the object type, the system displays the list of records of that object. You can select or unselect the object which you wish to associate with the event.

4. **Associated objects**

In this field, the system displays the objects which you associated with the event. You can also use it to de-associate an object.

5. **Search field**

Here you can define your search criterions, like "A*" (object with names starting with "A").

6. **Find button**

You can use it for searching, after entering the search criterions.

7. **Go to next / previous page**

In case of many records of a given object type you can use it for moving to the next/previous 10 records (page).

8. OK button

Pushing the button closes the window. The changes are saved in the Pocket Calendar and also in your Salesforce.com local database.

9. Cancel button

Pushing the button closes the window. The changes are canceled.

After you accept the changes the system saves the associations to the Salesforce.com local database and also writes some information into your Pocket Calendar event:

- The system adds to the Notes of a given event information about the associations you have made. It also includes, for your convenience, information like email address, phone, etc, of the associated person.
- The system includes in your Pocket Calendar events information about the attendees.
- The system adds to your Pocket Calendar events, an additional category: SF_MY (if you are the owner of the event or your attendee) or SF_OTHER (if you are not the owner and not attendee). You can use the categories for simplified events filtering.

Important:
Data mentioned above is inserted into the event only for your convenience. The actual information about the association between the event and other objects, are saved in the local database. If you delete/modify the information in the notes, it will not influence the actual association.

Editing an event

If you change an event using the Pocket Calendar, the system will open the same window as if you would be creating a new event. The only difference is that the window already contains information about the associations with other objects.

Important:
If you wish to change the associations, just “temporarily” change anything in the Pocket Calendar event (for example put an additional space character in the event title). This will cause the system to display the window showing the associations, at which time you will be able to change them.

Additional information

If you create/modify an event using the standard Mobile@Connector forms, and not the Pocket Calendar, all changes will be directly pushed to the Pocket Calendar. Once you switch to Pocket Calendar, you will be able to see the changes.

If you create/modify an event with the Pocket Calendar, all changes will be directly pushed to the local database. In order to see the changes in your mobile application, you have to “refresh” the events. This forces your mobile application to select the newest data from the local database.

Known limitations

Due to limitations of the Salesforce.com API:

- The event attendees can be downloaded from Salesforce.com to your local device/Pocket Calendar, but the attendees defined locally cannot be pushed up to Salesforce.com.
- The resources object is presently not available in the API. This may come in a future Salesforce.com release.

Re-customizing your application

After using your mobile application for a while, you can change your mind – maybe you com top the conclusion that including or removing additional objects, functionality or records would make more sense.

Same situation can happen if you modify your large Salesforce.com, and you would like to be sure that your mobile application reflects the changes.

In both situations you need the possibility to re-customize your application.

Important:

If you customize your Salesforce.com account AFTER your mobile application is created, you will have to "force" the system to re-create your application again. Do not forget to synchronize all your local handheld data to the server BEFORE making such changes in Salesforce.com (or you can lose your changes at your handheld local data). You can re-create your mobile application using your customization site (the URL of your customization site will be contained in the email informing you about your account).

How to re-customize your application?

You can re-customize your application (including the content of your local database) by accessing your individual customization site. The link to that site is contained in the email which you will receive after registering for an account (either the trial or the real account).

Note:

- **the customization is not enabled for the demonstration – demo – account**
- **the customization is very limited for the trial version. For the trial account, the service uses default settings – you only can select which module should be mobilized (Sales, Service, etc.).**

If you access your customization site, you will have to login to the service. You will have to enter not only your Salesforce.com credential, but also the Access Key and Access Password sent to you after registering by email.

Note:

To access your customization site, click the link in your notification email. If you do it, the fields "Access key" and "Access password" will be filled-in automatically. If you don't click the link but copy it and enter in a browser yourself, you will need to enter "Access key" and "Access password manually.

After you log in, the system will display, after a while, the name of your application. You will have 3 possibilities:

- to modify your former mobile solution (useful, if you just want to make some modifications like including an additional object into your mobile application, removing an objects, or changing the rules for the to-be-downloaded data

- to delete the solution
- to create a new solution

After you make your decision, you will have to wait for a few minutes – thereafter the system will display a site containing the structure of your “large” Salesforce.com application.

- If you decided to modify your former mobile solution, you will see your former definition and you will be able to modify it.
- If you decided to create a new solution, you will see the structure of your Salesforce.com account with the default service’s settings

Now you will be able to re-define (or define – on case of a new solution) your mobile application in the same way as doing it for the first time (see the chapter “Customizing your application”).

Important:

You can change the parameters of your application in two ways:

a) You change object(s) which should be included in your application (you include or exclude an object - the first column). In this case the system has to generate a new version of your application. You will be forced to download the new version of your application and the local data as well.

   Note:
   In this case, your newly defined data set will be downloaded. Due to this mandatory download, PLEASE synchronize your data BEFORE changing the parameters of your local data (if you forget this, you will lose your local changes you made on your handheld unit that you have not already synchronized).

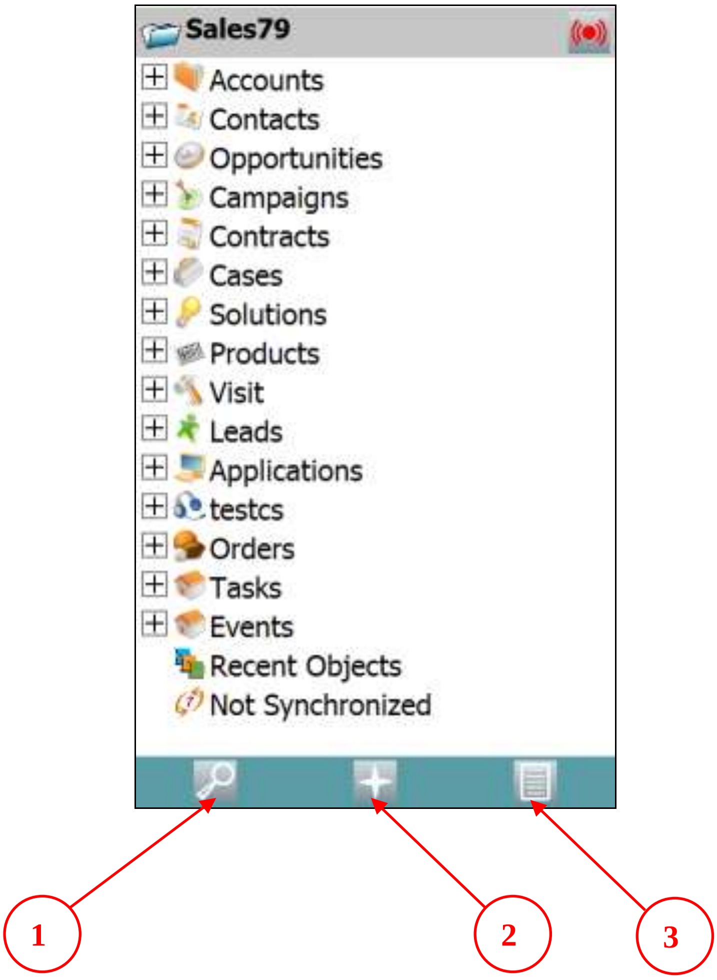
b) You change only the amount of records in the objects. In this case it is not necessary to do anything – the system will make any changes automatically while synchronizing the data – removed data will be removed, added data will be added.

Stylus navigation

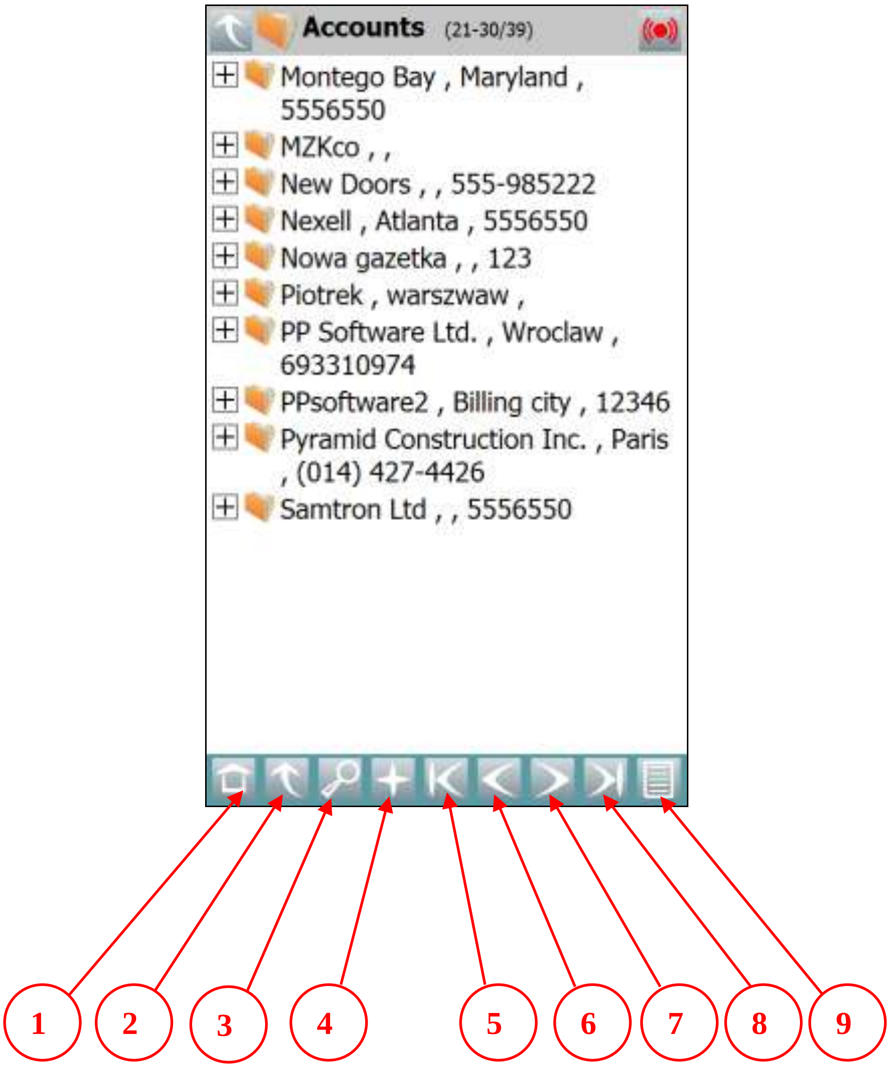
This documentation was written based on the finger navigation, However, you can decide to use stylus navigation instead, which is much more useful, if you have to enter a lot of data. The information how to switch between the finger navigation mode and the stylus mode, you can find in the chapter “Finger navigation”.

If you switch to the navigation with the stylus, you will see at any window a traditional toolbar instead of the large icons appearing only after you tap the screen, and disappearing after a few seconds.

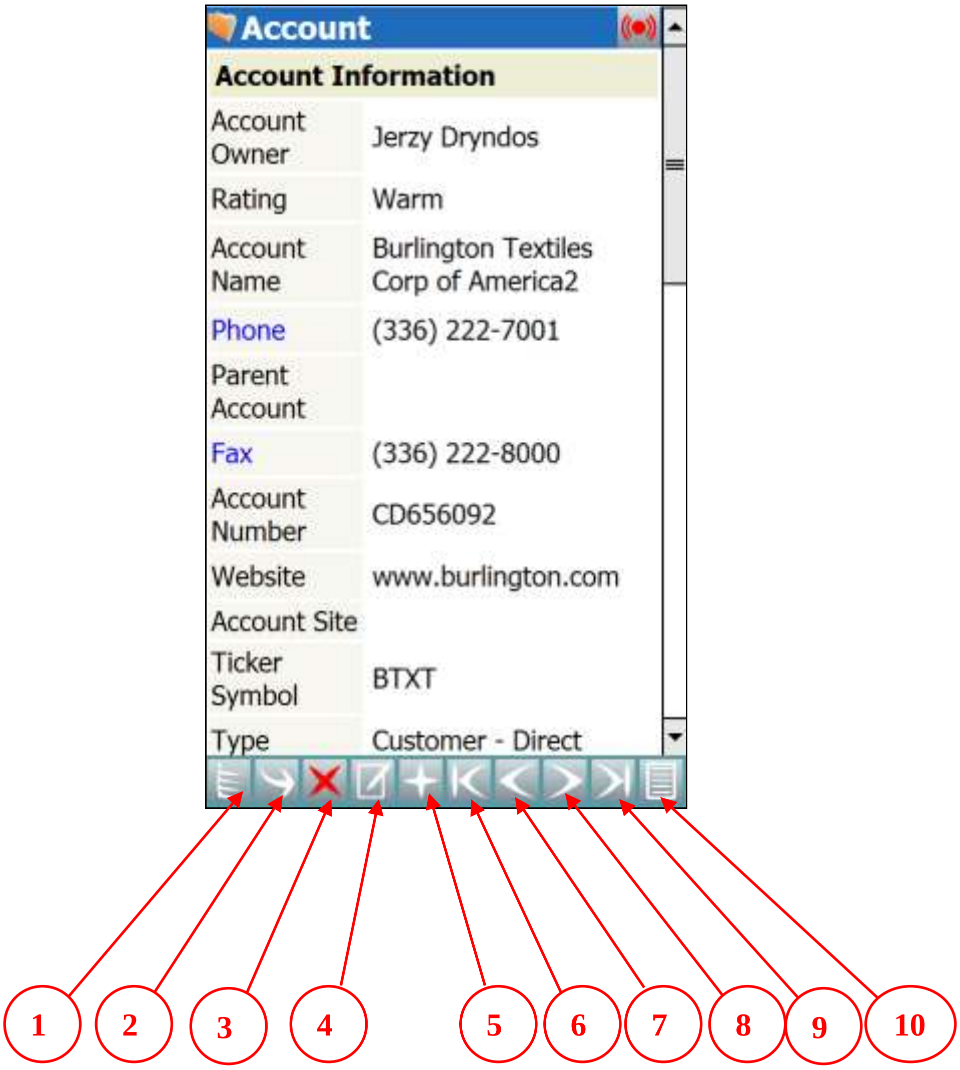
Bellow, you can see the toolbars that appear at different places, and information regarding the icons from the toolbars.



1 – Fast search
2 – Add new object
3 - Menu



1 – Start side (main menu)
2 – One level up
3 – Search
4 – Add a record
5 – First record
6 – Previous record
7 – Next record
8 – Last record
9 – Quick menu



1 – List view
2 – Related objects
3 – Delete
4 – Edit
5 – Add a record
6 – First record
7 – Previous record
8 – Next record
9 – Last record
10 – Quick menu

Additional information

If you need additional information, please contact us – we will do our best to help you.

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