SalesForce Integration

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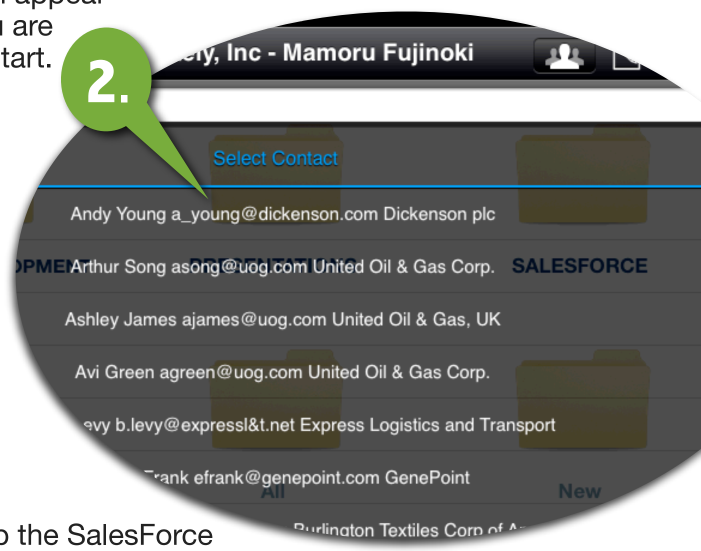
This guide will show you how a CRM application can be integrated with your vablet account. Contact us to enable the CRM application on your account in order to access the following functionality.

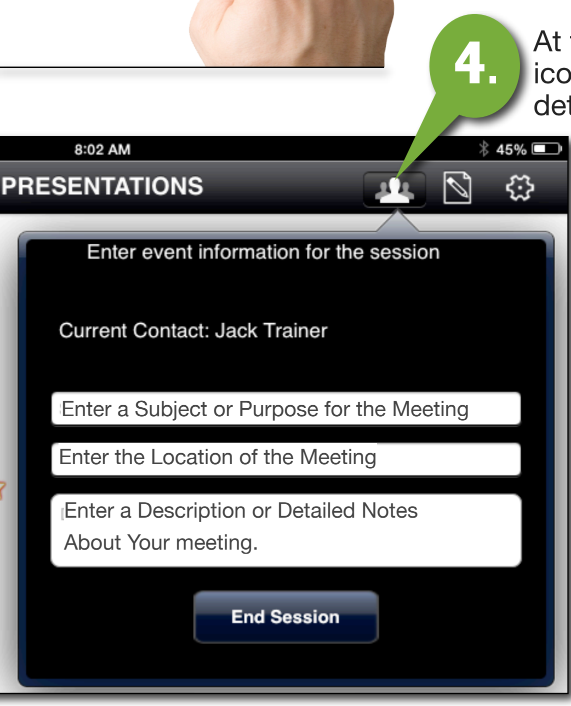
Once the CRM application, such as SalesForce, has been enabled on your account, then your device users will see this icon appear in the upper right corner of the vablet toolbar. Tap this icon when you begin your meeting to begin recording your session.

A list of contacts from your SalesForce account will appear as an overlay on your screen. Tap the contact you are meeting with, and your session will start.

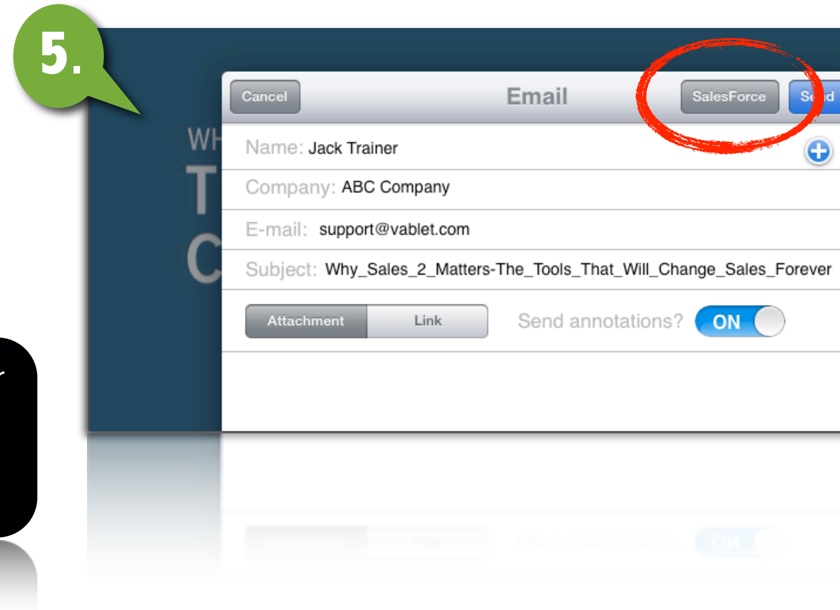


Tap any number of files throughout your meeting and all of your activity will be recorded on your Salesforce account. Information about your session will appear in 'Activity History' and in 'Media Views' as a custom object.

At the end of your meeting, tap the SalesForce icon in the toolbar to end the session and enter detailed information about your meeting.



Sharing is caring. And easy! If the file has been authorized for sharing, tap on the file while it's open and file options will appear at the bottom of your screen. Tap the email icon and a simple email form will appear. The current session contact will pre-populate the form and you may add additional contacts from your SalesForce account by tapping the 'SalesForce' button in the upper right.



For administrators and content managers, have a device at your fingertips when testing the CRM integration, so you can watch the device reporting appear on your SalesForce account.

TIP