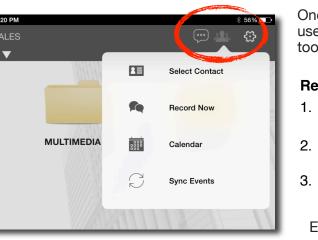
Salesforce Integration



This guide will show you the basics of our Salesforce integration. Contact us if you would like to schedule a more comprehensive online training with your team leader.



sales force

Unresolved Items

John Smith

Michael Ames

MD-00023

MD-00026

Search

Chatter Files Media Views Reports Dashboards

Calendar Event

Back to List: Contacts

Event Detail

▼ Calendar Details

New facility tour

Go to Related Call Record

Once Salesforce has been enabled in your vablet account, then device users will see the people icon appear in the upper right corner of the toolbar. Tap this icon and choose one of three ways to record a meeting:

Recording an Event

- 1. **Select Contacts** from your Salesforce contact list and begin recording a session.
- 2. **Record Now** starts recording a meeting, and the contact can be added afterward.
- 3. Calendar starts recording a meeting from a calendar event.

Enter details about your meeting when adding to your Salesforce calendar or after ending a session.

Once you begin to record a session, all of your media views and notes will be recorded and viewable on your Salesforce account, upon sync.

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Show Media Views Start Session

Michael Ames

Mon May 12 2014 11:17 AM

Mon May 12 2014 01:01 PM

Subject - Michael Ames

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If you're conducting your meeting offline, without any WiFi access, no problem! Session details will sync with your Salesforce account, the next time you connect to WiFi.

Paul Pacun

New facility tour

12/05/2014 2:49

12/05/2014 11:20 AM

Subject

Star

End

Edit Delete Create



Salesforce Integration

All Day Productivity

Integration with Salesforce goes beyond just meetings. Whether taking a break between meetings at the local Starbucks or waiting in the airport for your flight, you can also perform other activities and sync them to your Salesforce account.

View and Edit Calendar

Take time to organize your activity and view upcoming meetings by day, week or month.

You can even edit or add the details of past meetings.

Emailing and Lead Gen

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.

If you're sending during a recorded meeting, then the Salesforce contact will pre-populate the form. Tap the Salesforce link in the header to add additional contacts from your Salesforce account, or select contacts here when outside of a recorded event.

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iPad 🗢	5:52 PM						
< Back	Calendar						
	 May 2014 						
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	27	28	29	30 •	1	2	3
	4	5	6	7		9	10
	11	12	13	14	15	16	17
	18	19	20	21	22	23	24
	25	26	27	28	29	30	31
Thu May 08 2014 02:57 AM - Thu May 08 2014 02:58 AM Follow up after NAB show <john.smith@sydneypublic.com.au></john.smith@sydneypublic.com.au>							
Thu May 08 2014 02:38 PM - Thu May 08 2014 02:53 PM Weekly call <john.smith@sydneypublic.com.au></john.smith@sydneypublic.com.au>							
Thu May 08 2014 02:53 PM Training review							
Thu May 08 2014 02:54 PM - Thu May 08 2014 02:55 PM Product exchange							
Thu May 08 2014 03:26 PM - Thu May 08 2014 03:27 PM Meeting about six sigma							
Thu May 08 2014 03:32 PM Demo							
Thu May 08 2014 08:24 PM - Thu May 08 2014 08:39 PM Demo PK-199							
Thu May 08 2014 09:26 PM - Thu May 08 2014 09:27 PM ACME Show follow up							
Today Month Week Day							
	-	-	-	-	-	-	-

Customize the look of your email, when your users share files. Global branding is managed on the vablet Admin console.

> La Die der passent Be-BEARGARDie name: Agend. die fort work, try right calcular Save langet auf or Save link

File name: DAgul@edgas.djr@cdau.u

PDBA

Here's your file!

To access, click on the New Scanning District Systems with Sikkidde Scanning (it clicking on the link above did not work, try right clicking (it clicking on the link above did not work, try right clicking - where on 'Save as', 'Save target as' or 'Save link

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Online or Offline

All activity will be logged on your Salesforce account as an event, regardless of whether you were recording an actual meeting.

iOS | Windows 8