



Mobile@Connector for Salesforce.com

Provided by: Logotec Engineering

User's Manual
Version 1.1.1



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General information

Overview

Mobile@Connector for Salesforce.com provides mobile handheld access to your Salesforce.com data. It allows users to work online or offline, including full bi-directional synchronization.

The solution supports standard Salesforce.com functionality, as well as the full range of customizations, specific for a given user or environment (custom objects, etc.).

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.

Access to your Salesforce.com calendar (events) and to-do lists (tasks) is provided with the standard and very convenient to use Pocket PC tools (Calendar, Tasks) – including deep integration and synchronization with specific Salesforce.com objects.

Supported devices

All Windows based devices are supported:

- Pocket PC (Windows Mobile 6.1/6.0/5.0, Pocket PC 2003 Second Edition,)
- Pocket PC Phone Edition (Windows Mobile 6.1/6.0/5.0, Pocket PC 2003 Second Edition,).
- Smartphones (Windows Mobile 6.0/6.1)

Note:

- The mobile application offers similar functionality and user experience as working with Salesforce.com on your normal computer. The functionality has been adapted to suit the various devices' features and inherent limitations (screen size, memory, etc.).
- The mobile application includes the customizations made in Salesforce.com (custom objects etc.)
- In addition, the mobile application can be further customized, on top of Salesforce.com standard customizations (features, functions, layouts, logic etc), to allow for "mobile specific" user requirements.

Price

Mobile@Connector is offered as an On-Demand solution. The price is USD \$25.00, (Euro €25.00 in Europe), per user per month.

An "Extended account" is available for companies who require custom features and functions, implemented in Mobile@Connector.

Salesforce.com editions

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

Mobile@Connector for Salesforce.com

There are three types of Mobile@Connector accounts / applications:

- **Demonstration (Demo) account**
Download a demo Mobile@Connector application, connected to a demo Salesforce.com environment and test it using a built-in, PC-based mobile device emulator (offline and read-only). This demo cannot be configured nor can it be used on your personal mobile device or your personal Salesforce.com account.
- **Free 30 day trial account**
Download a full version of Mobile@Connector, specifically configured to your personal Salesforce.com account. You will have mobile access to all your Salesforce.com data, without any limitations in features or functions, throughout the 30 days.
- **Full version**
The full, purchased version of Mobile@Connector for Salesforce.com.

Procedures for the Demonstration (Demo) version

You are not required to have your own Salesforce.com account, to register for Mobile@Connector "Demo account". Simply follow these steps to try the demo:

1. Go to www.MobileConnector.com/salesforce, select the "Demo" option, and fill in the registration form. Please be sure to enter your correct email address, as the demo details will be sent to you via email.
2. The system will initialize, install & start the mobile demo application.

Note:

- *The demo works in offline mode only and does not allow you to synchronize data. All data is read-only.*
- *You can use the demo application as long as you wish.*
- *To further test the Mobile@Connector functions, please proceed to the 30 day Free Trial below.*

Procedures for the Trial and / or the Full version

To use the Trial or the Full version, you must have a Salesforce.com account which allows the use of the Salesforce.com API (see above for further details).

To register for the Trial or Full versions, please:

1. Go to www.MobileConnector.com/salesforce, select the option "Trial" or "Buy", and register (please be sure to enter your correct email address, as all details will be sent to

you via email).

2. The registration process will ask you to enter your Salesforce.com username and password. This is required to create and connect the Mobile@Connector application to your specific Salesforce.com account. We don't store your Salesforce.com details in our system, but just forward it, in an encrypted form, to Salesforce.com to identify your account.
3. The setup routine will remotely connect to your Salesforce.com account, and provide more information concerning your mobile application, as well as the data the system should store on your local mobile device. There are 2 possible scenarios:
 - If the status of your setup is "OK", the installation process then simply needs to be confirmed to continue. You can, if you wish, change the default parameters before continuing the installation process. Further details can be found in the chapter "Customizing Your Application"
 - If the status of your setup is not "OK", the likely reason is that the default parameters, automatically set by the system, have selected too much data to be stored in your mobile device's local database, from your Salesforce.com account. In this case, you **MUST** modify the parameters accordingly. Further details can be found in the chapter "Customizing Your Application"
4. Afterwards, the system will create a mobile application specific to your environment. The mobile application will include the customizations you've made in your Salesforce.com, and also include the parameters you setup in the customization site. The system will then send you an email with the URL of your mobile application, and will also include all information necessary for you to use your mobile application.
5. You can now connect to the specified URL, using the Pocket Explorer on our mobile device or Internet Explorer on your desktop/laptop computer. The system will automatically download and install your mobile application and your data on your mobile device. More information can be found below, in the chapter "Starting your mobile application for the first time". Important: your mobile application is NOT a browser based application but you still need Pocket Explorer to download it.
6. You can use your mobile application online, offline, as well as synchronize your local data with your Salesforce.com account, bi-directionally. If you are working with the trial version, usage will be limited for 30 days. More information can be found below, in the chapter "Using your mobile application".
7. You will also receive an additional email, detailing the URL of your mobile application's customization site, its access key and password. You can use this site to modify your mobile application or create a new version of your mobile application. More information can be found below, in the chapter "Customizing your application"

Important:

*If your Salesforce.com account is modified (customizations etc), after the initial installation of your mobile application, you **MUST** go to your mobile customization site and re-create / re-install your mobile application. The newly created mobile application will reflect all the changes you made in your Salesforce.com environment.*

Additional notes:

- In order to use your trial or the full version of the mobile application, you will have to enter your Salesforce.com username and password. We store your Salesforce.com username in our system, but we do **NOT** store your password – the password is simply forwarded to Salesforce.com.

- To be able to register, you will have to have a Salesforce.com account supporting the Salesforce.com API. See above for further details.
- If you have more than one application defined in Salesforce.com, the list will be displayed and you can select which one should be “mobilized”. This process can of course be repeated and another application selected, if required.

Starting your mobile application for the first time

Mobile connectivity note:

When connecting your mobile device to the internet, you can use any kind of connection while working with your mobile application. However, when you are using the application for the first time, a relatively large amount of data will be downloaded and installed (local database, local application, all data you need locally etc). We therefore suggest you use the fastest connection speed available on the mobile device, for this initial load.

Important:

- Your mobile application is NOT a browser based application but you still need Pocket Explorer to download it.
 - The following description concerns installation on Windows Mobile 6.0/6.1 Professional and Classic devices. For differences concerning Windows Mobile 6.0/6.1 Standard, Windows Mobile 5.0, and Pocket PC 2003 devices, please see additional comments below.
 - For Mobile@Connector, you can only use MS Pocket Explorer to download your application. You cannot use other browsers (Opera, etc).
 - If there are additional browsers installed on your mobile device, please ensure that they are not set as the default browser.
 - Please reset your mobile device before connecting to the provided URL, and ensure that you have at least 20 MB of free memory.
1. Go to the URL address of your mobile application (sent to you by email), using your Pocket Explorer, on your mobile device.
 2. After the log-in page appears on your screen, the system informs you that you do not have the Mobile@Connector client installed on your local device. Once accepted, it will then start the installation process automatically.
 3. Once the installation has completed, please start the Mobile@Connector client (Today screen > Programs > M@C). The system will display a window where you will be able to enter the URL of your mobile application. Enter the URL (sent to you by e-mail), and click OK. The system will display the login site of your application. Please log-in using your Salesforce.com credentials (username and password).
 4. The system then automatically downloads the local part of the application onto your mobile device. Depending on your device's connection speed, this may take several minutes (the first time only).
 5. The system then starts downloading data you selected to store on your local device (see chapter **“Local database”**) into your local database

The initial process of downloading and saving data to your local database usually takes 10 -

20 minutes. This time depends on the data, connection speed and the “power” of your device. This process not only includes the downloading data, but also creates the proper database structure on your local device (local tables, fields etc.), and converts the data to the required format of the local database.

After this process is completed, you can work online as well as offline (with thousands of local records saved on your local device), and re-synchronize your data when connected back online.

Important:

- Please reset your mobile device after downloading data into your local database
- If you encounter any problems during the application or data download (losing connection, problem with your device, etc.), you still can reset your device, start your application a second time (online, connected to the Internet), and continue to download from the point at which the download process halted.

Additional remarks concerning installation on devices older than Windows Mobile 6.0

All Windows Mobile 6.0/6.1 devices have Compact Framework 2.0 Service Pack 1 already installed in ROM. On Windows Mobile 5.0 devices there is an older version of Compact Framework installed, and on Pocket PC 2003 devices Compact Framework is not installed at all.

Mobile@Connector Salesforce.com recognizes the individual cases, and installs Compact Framework 2.0 Service Pack 1 (on Pocket PC 2003 devices), or updates the older version (on Windows Mobile 5.0 devices).

Important:

If you are using an external memory card in your device, you will be asked, during the installation process, where the Compact Framework has to be installed (on the external memory card, or on the device’s main memory).

Please select the device’s main memory to install the Compact Framework.

All Windows Mobile 6.0 devices have MS SQL Server Compact Edition already installed in ROM. On Pocket PC 2003 and on Windows Mobile 5.0, MS SQL Server Compact Edition is not installed.

Mobile@Connector for Salesforce.com recognizes the individual cases and installs MS SQL Server Compact Edition on these devices.

Important:

- In the case of Windows Mobile 6.1, 6.0 or 5.0 devices, (except for Smartphones) the installation of any component mentioned above (Compact Framework, MS SQL Server Compact Edition, and Mobile@Connector client) starts automatically.
- In the case of Smartphones and Pocket PC 2003 devices, the installation of the local components does not start automatically. You will be informed that the specific component is not installed, after which you will have to start the process manually. To do so, move to the bottom part of the login page, and click the provided link (“Install Compact Framework”, Install MS SQL Server Compact Edition”, “Install Mobile@Connector client”).
- Please reset your device after installing Compact Framework or MS SQL Server Compact Edition, and ensure that you have at least 20 MB free memory.

Customizing your application

If you customized the standard Salesforce.com environment (custom objects, forms etc.) these changes will be automatically reflected in your mobile solution.

Important:

If you customize your Salesforce.com application after your mobile application has been created, you will have to “force” the system to re-create your mobile application again. Don’t forget to synchronize all your local handheld data to the server BEFORE making such changes in Salesforce.com, or you will lose the changes made in your handheld device. You can re-create your mobile application using your customization site (the URL of your customization site is included in the email sent to you by the Mobile@Connector service).

In addition to the customizations made with the standard Salesforce.com functionality, you can:

- Define which objects (Leads, Events, etc.) should be included into your mobile application. Doing so you can avoid overloading the storage memory of your mobile device.
- Define which objects should be stored in your local database for the offline access. By default, all objects of your application are included in your local database. If you exclude some objects from your local database, you will still be able to access the data from these objects while you are working online.
- You can also define record parameters of the objects included in the local database, which should be downloaded (how many, how old, etc.)

Below, you will find the various possibilities to customize your mobile application, in addition to the customizations made in Salesforce.com.

In addition, Mobile@Connector offers an almost unlimited set of possibilities to customize your local application, beyond the functionality provided by Salesforce.com, and beyond the functionality offered by default in the Logotec’s mobilization service. These are not covered in this document, but should you find that you require more functionality for your mobile users, than the features described herein, please contact us for an “Extended Account”. We will be happy to explain the additional possibilities.

Use the customization page below, to define the parameters of your application.

Object type name	Include into your application	Include in the local database	Only objects created myself	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	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	7	Not in the local database
Contact	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	9	Not in the local database
Opportunity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	2	In the local database
Campaign	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	1	In the local database
Contract	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	5	In the local database
Case	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	35	In the local database
Solution	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	1	In the local database
Product2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	2	In the local database
Document	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	360	2000	1	
Visit__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	0	In the local database
Lead	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	39	In the local database
Application__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	2	In the local database
testc__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	4	In the local database
Orders__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	1	In the local database
Event	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30	200	2	In the local database
Integrate events with Pocket Calendar			<input type="checkbox"/>				
Task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30	200	2	In the local database
Integrate tasks with Task Manager			<input type="checkbox"/>				

Objects included in your mobile application

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

Objects included in your local database

You can define which objects included in your application (Leads, Events etc.), should be stored in your local database (by default all objects of your mobile application are included). If you exclude some objects from your local database, you will still be able to access them, when you are working online.

Important:

- Events and Tasks must be included in the local database if you want to use integration with Pocket Calendar and Tasks Manager.
- If you want to use the integration with Pocket Calendar or with Tasks Manager don't forget to mark the given integration option

Event	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30	200	0	In folder
Integrate events with Pocket Calendar	<input checked="" type="checkbox"/>						
Task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30	200	0	In folder
Integrate tasks with Task Manager	<input checked="" type="checkbox"/>						

Selecting the records

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”).

Important information concerning Events and Tasks

In the case of Events and Tasks the system behaves as follows:

You will have access to your own events and tasks using the standard Calendar and Task applications included in your Pocket PC. Even if you included in your local database all events and tasks that you have permission to access, you will still only see your data.

If you want to see all data (and not only the ones you own) you can use the forms Events and Tasks in your application. There, you will not be able to change the data – as they are read-only. Changes can only be made in the Calendar and Event applications of your Pocket PC.

It is probable that you will have events and tasks stored in your Pocket PC, before you start to use Mobile@Connector - it is therefore important to understand how Mobile@Connector will handle them:

- If you download data to your Pocket PC device, Mobile@Connector loads all events and tasks to your Pocket PC Calendar/Task Manager. The category of all the events/tasks will be set automatically to “SALESFORCE”.
- Before loading the data, the system deletes ALL events/task stored in your Calendar/Task Manager, which also have the category “SALESFORCE” assigned.
- Any events/task with a category different from “SALESFORCE” will be not deleted.
- Any new event/task, which should be synchronized with your Salesforce.com account, must be assigned to the “SALESFORCE” category.
- If you already have category/categories set to a particular event, you can still add an additional category “SALESFORCE”.
- Only events/task assigned to the category “SALESFORCE” will be synchronized with your Salesforce.com account.

Application Customization

You can customize your application (including the content of your local database), by accessing your individual customization site any time you wish. The link to that site is contained in the email which you have received after registering for an account (trial or a purchased account). Customization features are not enabled for demo accounts.

Any time you access your individual customization site, you have to enter your Salesforce.com username and password, and also the Access Key and Access Password sent you by email after registration.

SalesForce user	<input type="text"/>
SalesForce password	<input type="password"/>
Access Key	<input type="text"/>
Access Password	<input type="password"/>
<input type="button" value="OK"/>	

After you enter your login credentials, the system will display within a number of seconds, a site containing information concerning your mobile application.

Using the first field (“Your Salesforce.com applications”), you have the possibility to select the Salesforce.com application which should be “mobilized”.

In the second field, you can enter the name of your mobile application which will appear on the start site of your application (by default the system uses the name of your Salesforce.com application)

Your Salesforce.com applications: **Sales**

Force users to use safe connection only (https):

Encrypt data on mobile device:

Name of your mobile application: Application has been already created 6/3/2008 14:09:07

Link to your mobile application: <http://test.mobileconnector.com/app/Sales1>

The language of your mobile application: **English**

Object list

Object type name	Include into your application	Include in the local database	Only objects created myself	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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	7	In the local database
Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	9	In the local database
Opportunity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	2	In the local database
Campaign	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	1	In the local database
Contract	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	5	In the local database
Case	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	35	In the local database
Solution	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	1	In the local database
Product2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	2	In the local database
Document	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	1	
Visit__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	0	In the local database
Lead	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	39	In the local database
Application__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	2	In the local database
test__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	4	In the local database
Orders__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="300"/>	<input type="text" value="2000"/>	1	In the local database
Event	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="30"/>	<input type="text" value="200"/>	2	In the local database
Integrate events with Pocket Calendar			<input type="checkbox"/>				
Task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="30"/>	<input type="text" value="200"/>	2	In the local database
Integrate tasks with Task Manager			<input type="checkbox"/>				

By default, the system sets the following parameters for your application:

- Your mobile application includes all your Salesforce.com object types except for Documents
- All objects included in your application are also included into your local database
- Only records that you created, and not records created by other people (even if you have right to see them) will be downloaded into your local database
- The local database contains data that is not older than 30 days
- The limitation is set to 2,000 records, for any object type

If the set limitation (2,000 records) is exceeded the status of the given object is shown as "Not OK". The status is displayed individually for each given object. In such cases, you have to change the parameters of given object until the setup status will be changed to "OK".

You can do this by shortening the period (for example: only records created in last 30 days instead of 90 days), by selecting only your own data (and not all data you have access to), or by extending the limitation to the number of records in the given object type (maximum value is 5,000 records).

It is not possible to create your mobile application until the statuses of all objects are OK. Only after doing this, you will be able to select the option "Create application".

Important:

You can change the parameters of your application either before using your mobile application for the first time, or at anytime afterwards. If you do it after you already have worked with your mobile application, there are 3 possible scenarios:

- a) You change object(s) which should be included in your application (include or exclude an object - first column checkbox). In this case the system has to generate a new version of your application. You will be requested to download the new version of your application as well as the local data.
- b) You change object(s) which should be included in your local database (include or exclude an object - the second column checkbox). In this case you will be requested to download the new local database, and the application will not be changed.
- c) You change only the amount of records in the objects (by changing the definition of the objects to be included). In this case it is not necessary to do anything as the system will make any changes automatically while synchronizing data.

In cases a) and b), you will have to download the newly defined local database. Due to this mandatory download, PLEASE synchronize your data BEFORE changing the parameters of your local data (if you forget this step, you will lose your all local changes you made on your handheld device, that have not yet been synchronized).

Administering your mobile account

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, doesn't 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 doesn't 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.



Try **Mobile@Connector**
for the **Appexchange** now!

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.

Your Salesforce.com applications SFA Prototype ▾
 Name of your mobile application SFA Prototype

Select users from your profile

User name	Permission to use the application
diane.cremille@abbott.com	<input checked="" type="checkbox"/>
ilka.gassmann@abbott.com	<input type="checkbox"/>
pasquale.siciliano@abbott.com	<input type="checkbox"/>
j.lewis@abbott.com	<input type="checkbox"/>
elena.maasem@abbott.com	<input type="checkbox"/>
system.administrator@abbott.com	<input type="checkbox"/>

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.

Select users from your profile

User name	Permission to use the application
dryndos@logotecengineering.com	<input checked="" type="checkbox"/>
krzewinski@logotec.pl	<input type="checkbox"/>

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 below:

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 deciding 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.

Re-configuring an application

When a user goes back to the configuration site, he will be able to re-configure the mobile application, as necessary, even when the application already exists.

The system behaves as follows:

- If the changes concern only the data to be downloaded onto your mobile device (objects to be included in the local database, definition which records have to be included in the local database, etc.), and not the application itself, the system will ask whether the changes in the local data definition concern all users who can use the application (default), or only selected users (in such case the local databases of other users will not be changed).
- If the changes will not only concern data but also the application itself (for example objects to be included into the application), the system will create a new version of the application. The user will be notified about the changes by email, and the system will download the new version of the application, the next time the given user will connect to the server.
- Not only can the application be changed, but you can also manage the user list (some users can be included, some users can be excluded). The user list, cannot, of course, go beyond the user list of the given Salesforce.com profile. The concerned users will be informed about the changes by email.
- If the changes concern users from the same profile as the profile of the person who is performing the changes, the system will behave exactly as in case 2. The users will be informed about the changes by email, and after they log-in while using the application (for example while trying to synchronize), the new version will be downloaded to their devices.
- It is important to note that the user will not be able to make any changes in the applications of other profiles. This can be done only by people who are responsible for configuring the application for the given profile. It is important to mention that such persons can change the application, but they cannot change the user list (as long as they haven't access to the Profile object in Salesforce.com, and as long as you haven't set the permission to do it at the customization site)
- The person managing the user lists cannot make any changes concerning the applications from other profiles except:
 - He can enter a text, which will be sent to the users responsible for re-configuring the applications for specific profiles (the text could be, for example “Re-configure your application”)
 - He will be informed about any changes made by the users responsible for configuring the application.

Managing changes in Salesforce.com

After you make a change in your Salesforce.com application, your mobile application will also need to be updated to reflect these changes. Depending on the changes made in Salesforce.com, it may happen that the application still works without updating. In all cases, when changes are made in Salesforce.com, in areas used by mobile users, updating the mobile application should be done to ensure both systems match and are up to date.

This means that after you change your Salesforce.com application, you should “re-generate” your mobile application as soon as possible. If more than one user profile exists, you have to inform the users responsible for the given profiles, so that they re-generate the applications as soon as possible as well.

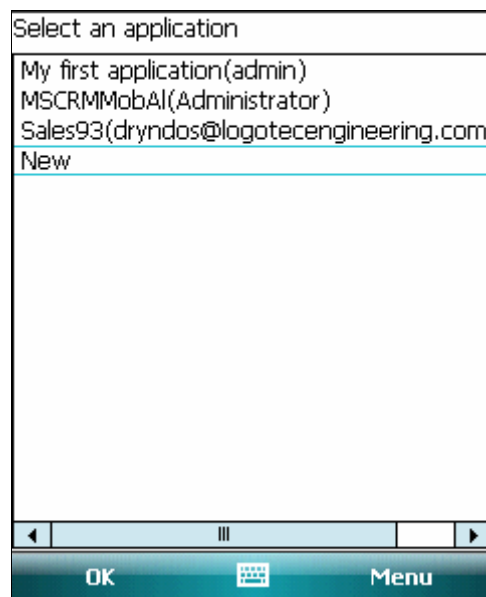
Using your mobile application

Starting your mobile application

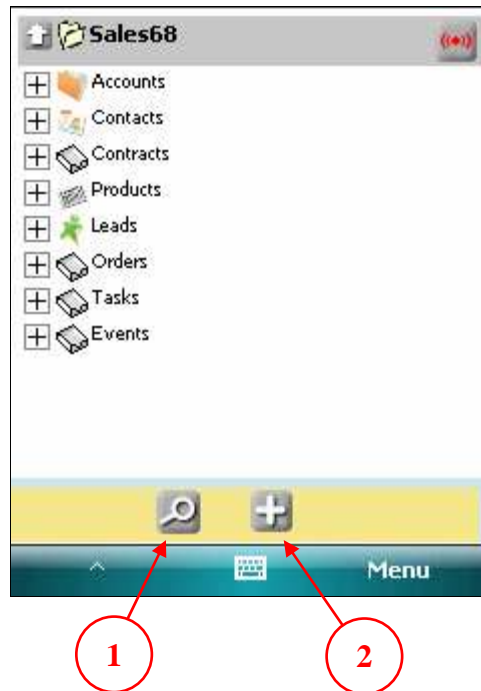
After the application and your local data are downloaded to your local device, and after you reset your mobile device (recommended), you can start using your mobile application. On your device, go to Programs > M@C and the system will display a screen with the list of your applications, simply confirm and start.

Important:

- If you start the application while disconnected from the Internet, the application will work offline. If you are connected while starting the application you will be asked if you want to work online or offline.
- While downloading your solution for the first time, Mobile@Connector automatically create an entry in the "Favorites" of your Pocket Explorer. Please, never delete the application from the favorites list, as if you do, Mobile@Connector will not be able to use your application (to be able to work you will have to download your application for the next time).



Initiating your application will take about 20 seconds – thereafter you will see following screen



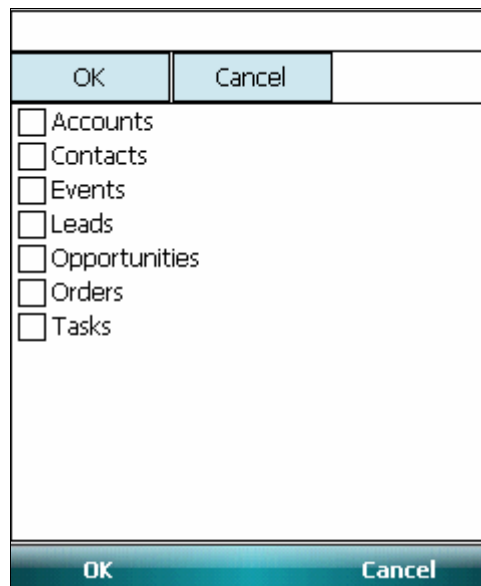
- 1 – Fast search
- 2 – Add new object

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

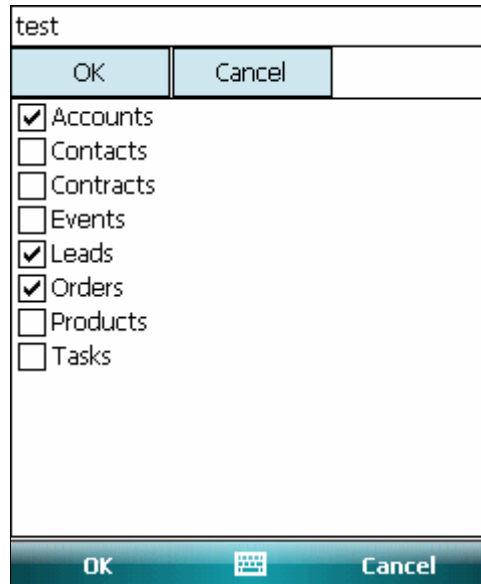
Fast search

Using this function you can find any object (Leads, Accounts, Orders, etc.) containing (in any text field) a given text.

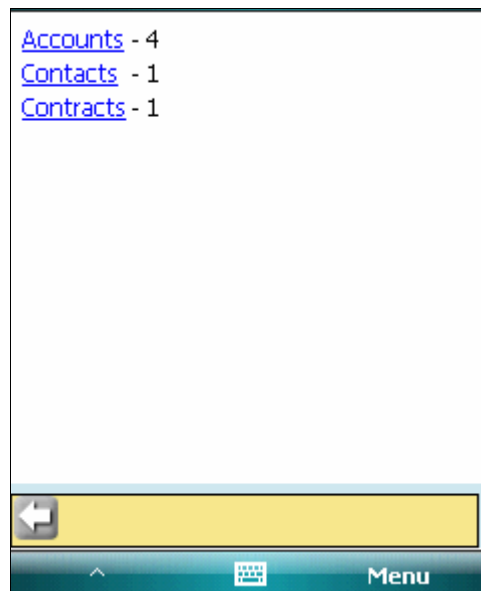
If you push this button, the system displays a screen where you can enter the searched text. It also displays the list of all objects of your mobile application and let you decide which objects should be searched through.



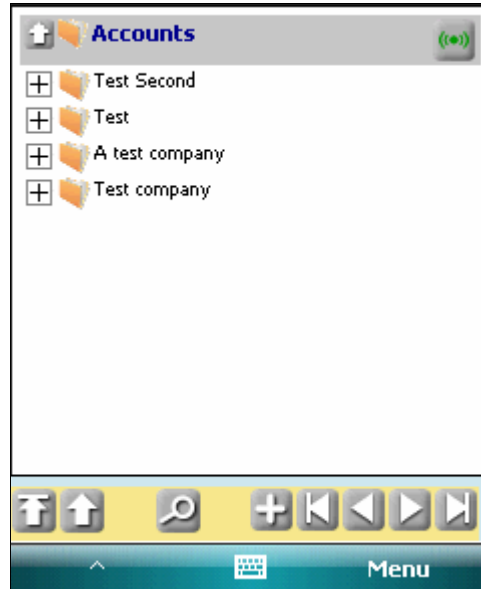
Enter, as example, "test" as search criterion, and mark following objects „Leads”, „Orders”, „Accounts”. Thereafter press OK button.



After about 15 seconds the system will display a screen with information how many records of given type have been found

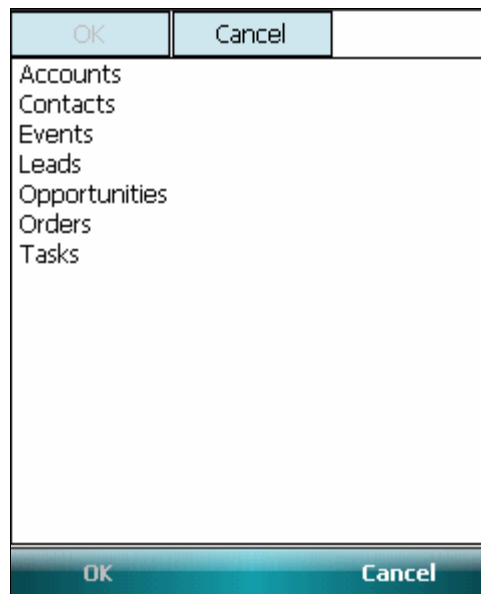


Now you can click the object which you are interested in and the system will display all records of the given objects which contain the searched text.

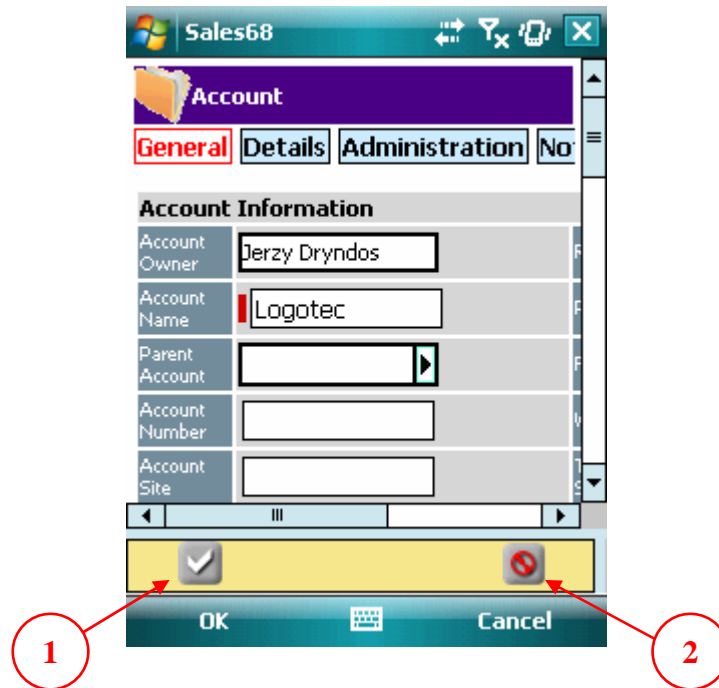


Adding a new object

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 wished object

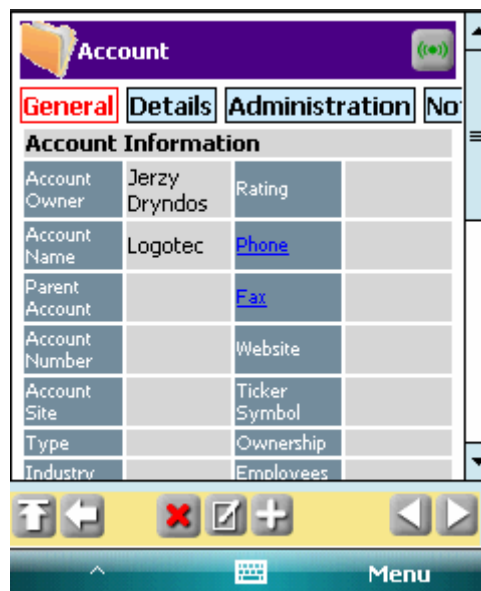


If you select, as example, “Account” the system displays, after a few seconds a screen where you can register a new account.



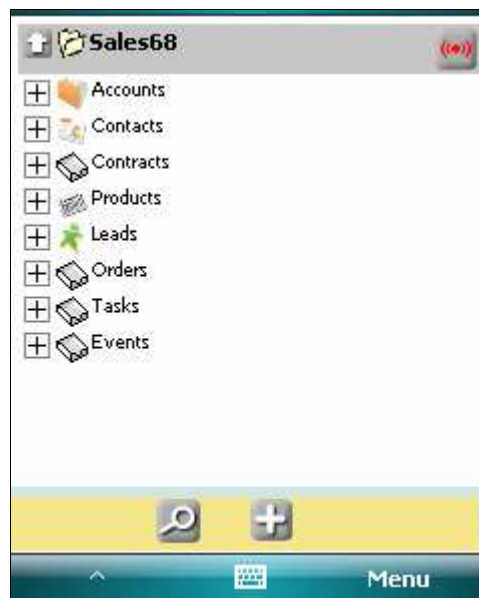
- 1 – Save
- 2 – Cancel

After you enter the necessary information push the “Save” button. System will ask you to confirm saving new record and displays newly added record in form view.




Information regarding smartphones

As you already realized most functions offered by your mobile application are accessible by icons located at the toolbar



In case of Pocket PC devices you just can push the given icons with a stylus. In case of smartphones you can only use “joystick” (or its equivalent) to do it.

To make accessing the toolbar easier while working with smartphones, we implemented a function

represented by the  icon that moves the focus directly to the toolbar. It has not a big sense if you are working with a Pocket PC using stylus, but if you are using a smartphone, you can call this function just by pushing the associated key of your smartphone (the left key located directly under the screen). In this way you can access the toolbar very fast.

General information

Working with your mobile application, you have access to your Salesforce.com data through two different views:

- The list view (tree structure / main menu of the application)
- Form view

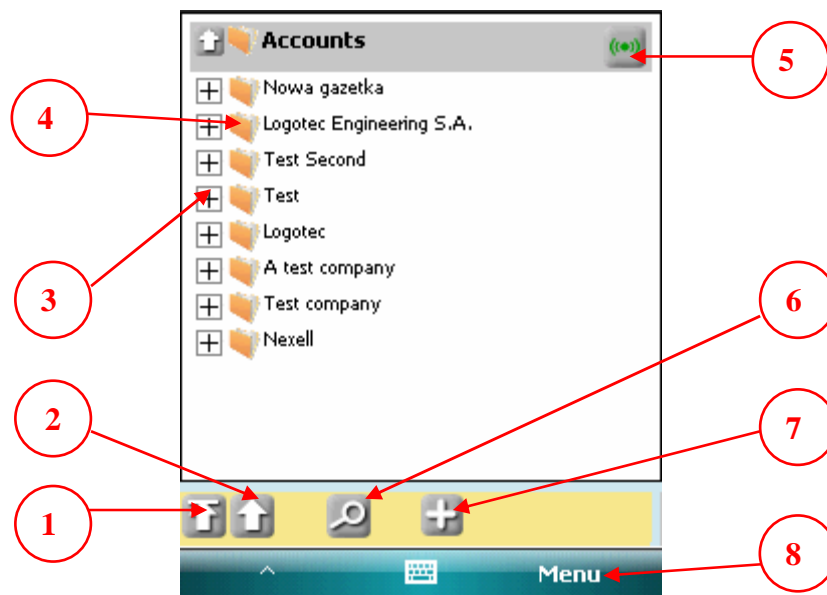
The tree structure organizes the access to all Salesforce.com objects and their records.

Each object has, as in Salesforce.com, a form containing all data of a given record.

Very important:

Additionally to Forms/Tree objects representing Calendar and Tasks in your mobile application, you can use the standard Calendar and Tasks applications of your Pocket PC device. The data will be synchronized between them and your Salesforce.com account (two-ways synchronization). Don't forget: that functionality can be used ONLY if you use a local database!

Structure of the application window



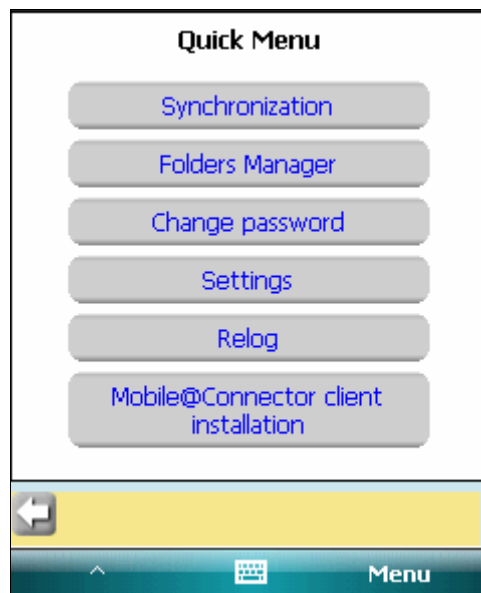
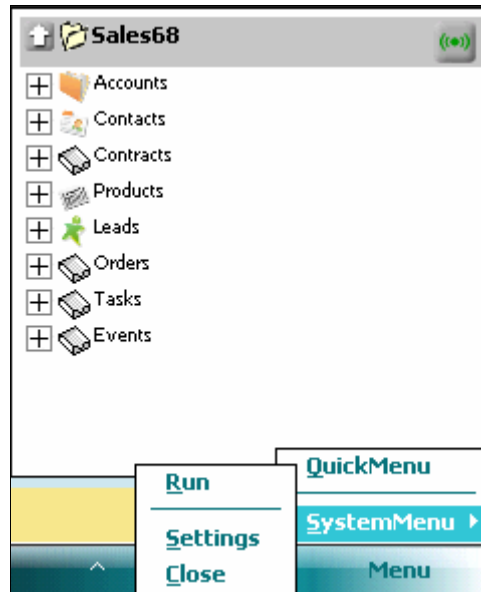
The elements on the screen above have the following functions:

1. **back to the main menu**
Pushing the button will take you to the main menu of the application
2. **back one level higher**
Pushing this button takes you back one level higher
3. **go deeper**
Pushing this button takes you one level deeper (in this screen example, the system will show you the account objects)
4. **go deeper**
 - Pushing this button you go one level deeper (in this case the system will show you the account details).
Despite similar functionality there is one difference between the buttons 3 and 4 - if you are working online (without using the local database) the button 3 don't access the server (it just shows the last selected objects). Button 4 access the server and downloads new objects from the server (refreshes the information).
5. **online/offline icon**
The system shows current status (online/offline). You also can use it to set the desired status.
6. **filter**
It enables searching for specific records.
The behavior of this icon depends on the place where the button is used. For more information see the chapter related to searching.
7. **Add new record**
This button allows you to add new record.

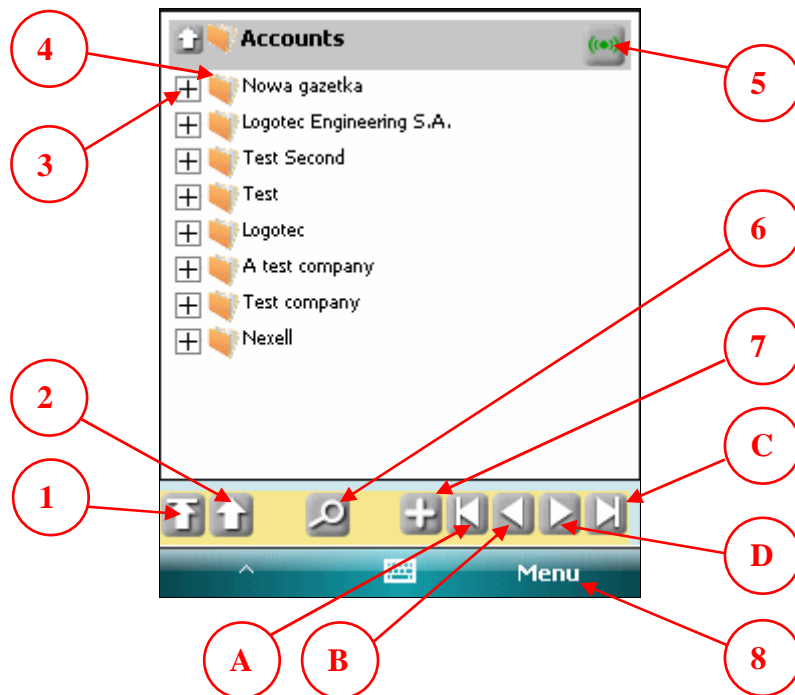
8. Menu

Once you press the “Menu” button, you will see two positions there: **SystemMenu** and **QuickMenu**. **SystemMenu** let you call functions like “Run” (start a new application), Close (close the current application), or Settings (system settings).

If you press the **QuickMenu** button you will see additional menu with functions like “Synchronization”, “Local databases’ manager”, “Change password”, “Settings”, “Relog”, and “Mobile@Connector client installation”.



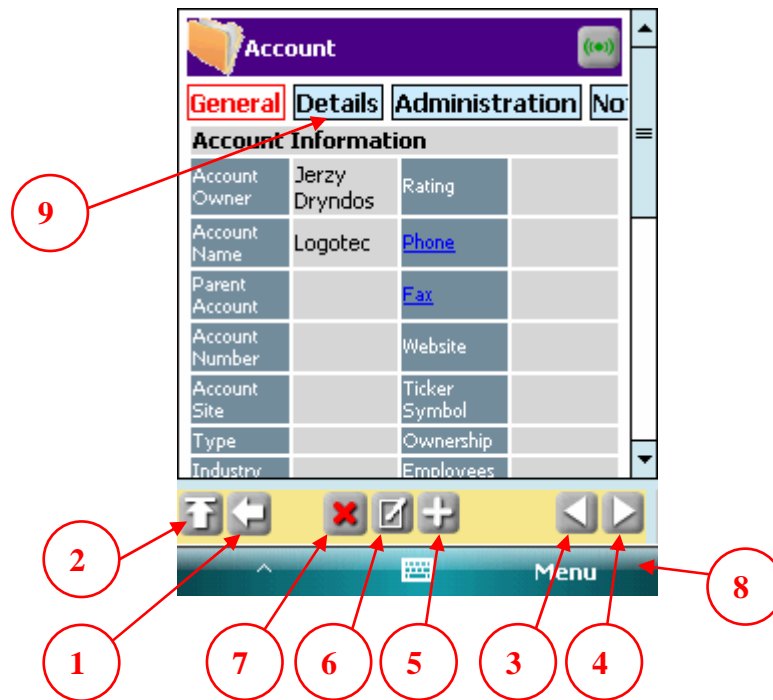
After you go deeper in the application tree structure (while using the 3 or 4 icons described above), you will see a list of the object's record.



The elements on the screen above have the following functions:

1. **back to the main menu**
Pushing the button will take you to the main menu of the application
2. **back one level higher**
Pushing this button takes you back one level higher
3. **go deeper**
Pushing this button takes you one level deeper (in this screen example, the system will show you objects related with the given lead)
4. **switch to form view**
Pushing this button you switch to the form view of the given record
5. **online/offline icon**
The system shows current status (online/offline). You also can use it to set the desired status.
6. **filter**
It enables searching for specific records.
The behavior of this icon depends on the place where the button is used. For more information see the chapter related to searching.
7. **add new record**
This button allows you to add new record
8. **Menu**
See above
- A. **Move to first records**
- B. **Move to previous records**
- C. **Move to next records**
- D. **Move to last records**

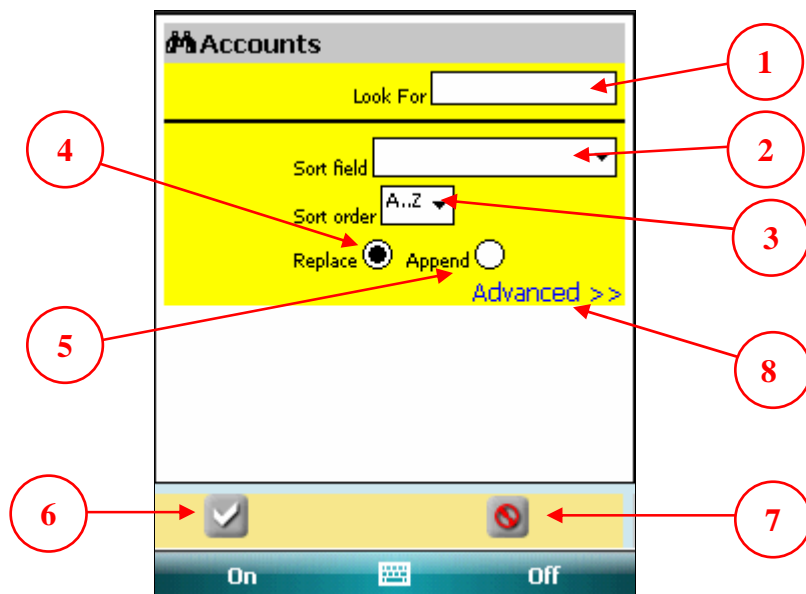
Form view



The elements in the screen above have following functions:

1. **back to the tree structure**
Pushing the button takes you back to the tree view
2. **back to the main menu**
Pushing the button will take you to the main menu of the application
3. **move to previous record**
4. **move to next record**
5. **add new record**
6. **edit current record**
7. **delete current record**
8. **menu**
9. **tabs**
Using it you can switch between specific parts or the form

Filter view

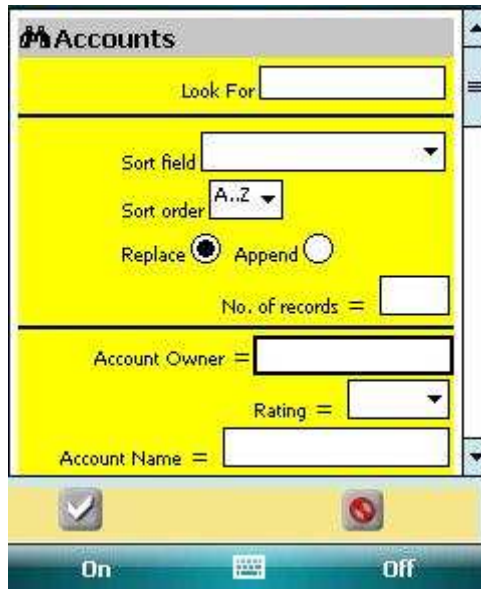


The elements on the screen above have the following functions:

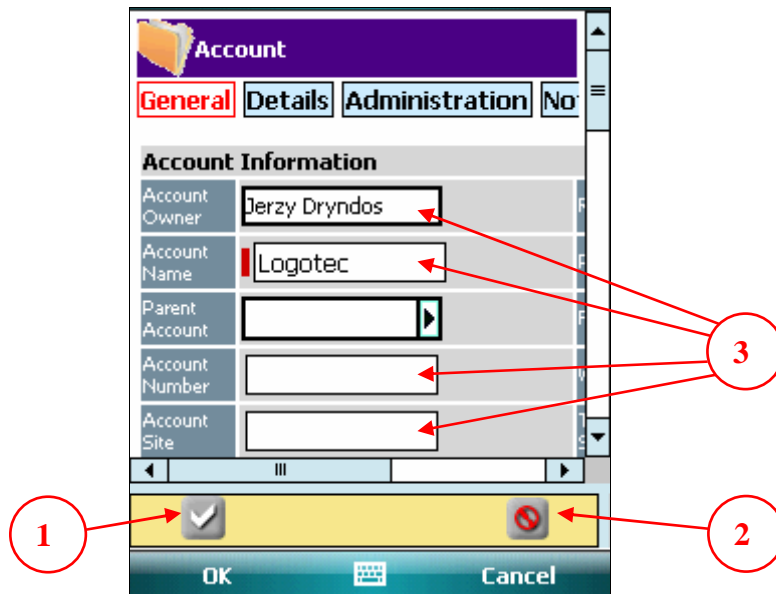
1. **Searched text**
You can enter here the text to be searched. The system will look for all record containing this text in any text fields.
2. **Sort field**
You can select a field to be used for sorting the records
3. **Sort order**
You can decide if the records will be sorted in ascending or descending 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. **Search button – with filter**
The system searches for the data using the filter definition.
Important:
 - if you are using a local database, the system searches in the local data base on your local device.
 - if you do not use a local database, the system searches on the server if you are online, or locally if you are offline
7. **Search button – no filter**
The system is searching for the data IGNORING the filter definition.
Important: the rules for searching locally or on the server are same as described above

8. Advanced

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



Edit view



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, if you are using a local database or are working offline, or at the server directly if you are working online and do not use a local database)
2. **Cancel**
If you press this icon all your changes will be ignored (not saved)
3. **Fields of current form**

4. Tabs

Using it you can switch between specific parts or the form

Integration with Pocket Calendar and Task Manager

General information

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.

Important:

- You can use Pocket Calendar and Task Manager for managing your Salesforce.com events and tasks only if you use a local database.
- You can use Pocket Calendar and Task Manager for managing your Salesforce.com events and tasks, only if you are using Windows Mobile 6.1/6.0/5.0 devices, and not with Pocket PC 2003 devices.

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

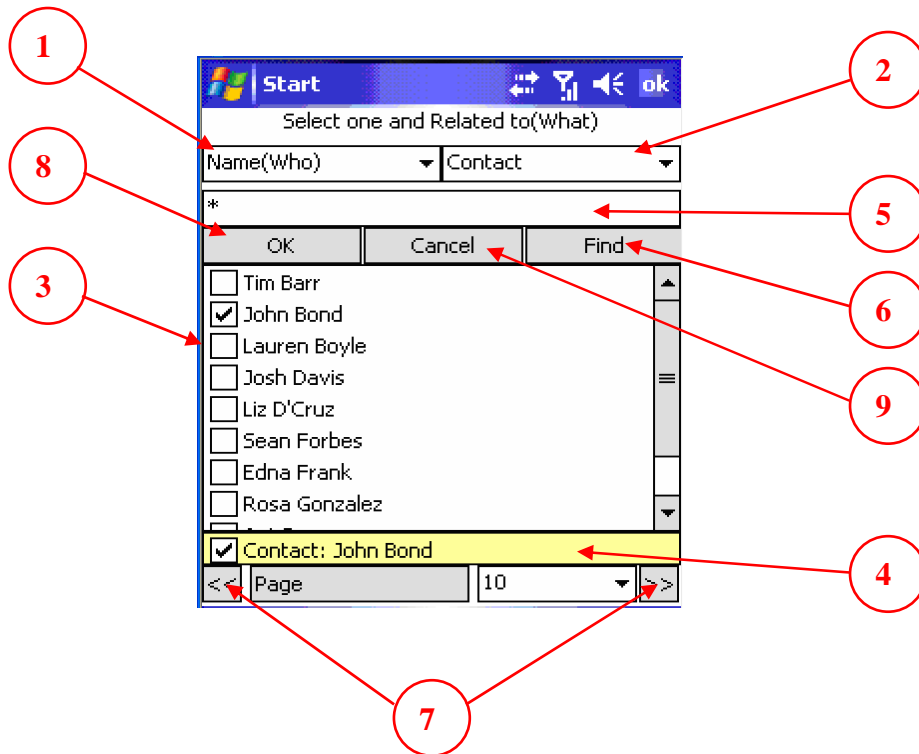
You don't need to do anything specific to be able to use Pocket Calendar/Tasks Manager for managing you Salesforce.com events or to-do lists. The system does all required steps fully automatically.

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:

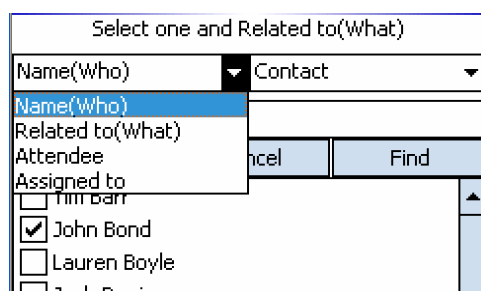
- Don't define attendees
- Don't forget to set the events category to SALESFORCE

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.

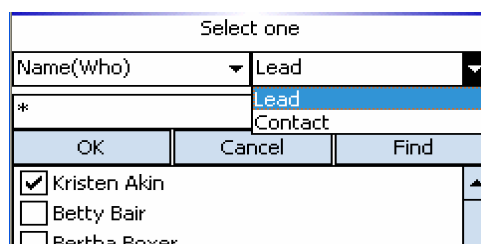


1. List of operations

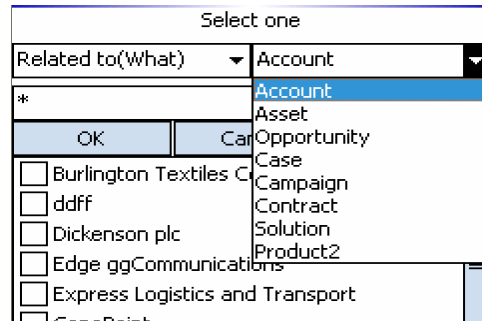
You can decide with **Who**, or **What**, you wish to associate the event, select attendees, or assign the event to a Salesforce.com user.



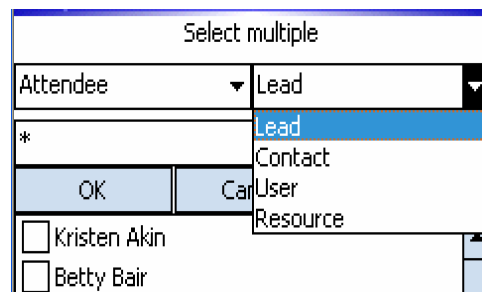
In the case of **Who**, you can select between a **Lead** and a **Contact**.



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

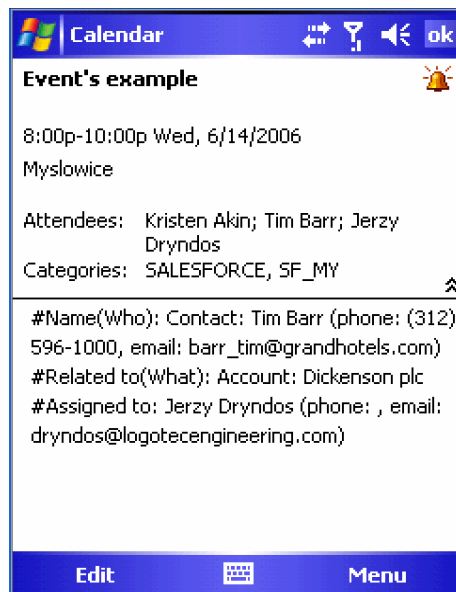
Pushing the button closes the window. The changes are canceled.

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.

Online and Offline mode

General information

Online mode

1. In the “online” mode, you work while being connected to the server. The type of connection is not important as Mobile@Connector for Salesforce.com supports any kind of Internet connection (CDMA, GPRS, EGDE, UMTS, wireless LAN, cable connection etc.). If you change any data and save the changes, they are saved directly on the server.
2. If you are connected, working online, and you lose your connection, the system will automatically switch to the offline mode. If you connect again the system doesn't switch to online mode automatically. You have to switch back to the online mode manually.
3. If you don't use the local database and you change some data while you are in the offline mode, the system will prompt you to synchronize automatically after you switch back to the online mode.
4. If you do the same thing using the local database, the system doesn't propose the automatic synchronization if you switch from offline to online. The synchronization process has to be started manually (Quick menu > synchronization).

5. If you are not using the local database and the online mode is switched to “on”, you are working online. There is only one, small is described in the chapter “Using your mobile application”.
6. If you are using the local database, you do not really work online, even if you are connected and switched to “Online”. When connected and in the online mode, the application works with data stored locally, offline. You have to use synchronization to synchronize with the server.
7. Important: if you wish to switch to real online mode and directly access the data stored on your server, you have to switch your local database off. You don’t have to delete it, but simply switch it off. You can switch the local database on again at any time (Quick menu > local databases > selecting/deselecting a local database).

Offline mode

If you are using the local database you can work in offline mode:

1. The system uses a local database (maximum of 5,000 records of any type). More information about the data, which are contained in the local database, can be found in the chapter “Local database”.
2. All the data you need locally are downloaded with just one click.
3. Bi-directional synchronization is being used (See chapter “Synchronization”, for more information).

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

All the local changes are sent to the server in small data packages. If there is a conflict, the system shows the objects for which the conflict occurred, with the necessary information. All other records, with no conflicts, are 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 same object (record) on the server. As result the object you are sending to the server doesn’t exist. In such a situation the system refuses to update the record and displays a appropriate message.

Searching for possible changes done on the server

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 at 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 been deleted or added, but it also looks for records which don’t fit to the local data specification.

Example: if you have specified that your local database should contain your leads from the last 90 days, then any time you synchronize, the system also checks for leads which are older than 90 days and deletes such records from the storage on your local device. As a result you will always have on your local device only the newest leads from the last 3 months.

Starting synchronization

The synchronization works differently when you are using local database (recommended) than when you are working without a local database.

Working without the local database

If you changed any data in the offline mode, and then enable the online mode, the system proposes automatic synchronization. As described above, only one-way synchronization is used.

Working with the local database

When working with the data saved in the local database, you are working offline at all times, even while being connected to the Internet. Due to this reason, you have to start the synchronization process manually.

Starting synchronization: Quick menu > Synchronization

Important:

Before starting synchronization be sure that you are connected to Internet and in online mode!

Local data

Local data are stored in the local database (MS SQL Server Compact Edition). If you start your application for the first time, the system downloads the local data automatically. If you change the definition of your local data thereafter, you can download the data manually (Quick menu > Local databases > Load). For more information see in the chapter “Customizing your application”.

After your data is downloaded, you can use the data locally, and synchronize with the server any time you wish (bi-directional synchronization as described above).

Very important:

If you want to use your mobile application with your Salesforce.com Calendar and Tasks, you **MUST** use the local database mode. Without using a local database, you will not have access to the data from these objects. As is the case with any objects

contained in the local database, your events and tasks can be used only offline and synchronization has to be initiated manually.

Additional information

For any additional information or support, please contact us.
We will do our best to help you.

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