



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

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 requires access to the Salesforce.com API, and therefore works with Salesforce.com Enterprise, Developer, Ultimate, and Platform editions, (Force.com), as well as any other edition(s) (Professional), where the API is available and enabled.

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/AppExchange.asp, 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/AppExchange.asp, 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 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 (Folder). There are 2 possible scenarios:
 - If the status of your folder 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 folder 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 Folder, 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”.
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:

The following description concerns installation on Windows Mobile 6.0 Professional and Classic devices. For differences concerning Windows Mobile 6.0 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. 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 informs you that your application has to use a local folder. Please accept. It then starts downloading your local folder, a set of data you selected to store on your local device, (see chapter “Folders”). Please accept again to continue.

The initial process of downloading and saving data to your local folder usually takes 10 - 20 minutes. This time depends on the folder size, 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 the folder
- If you initially decided not to download the folder, you can do so, at any time, using the option “Quick menu” (icon in the bottom right of your screen), from your application, (quick menu > Folder manager > selecting the folder > pressing the button “Download”). This option is only possible if you are connected online.
- If you encounter any problems during the folder 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 your folder 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 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 6.0 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 have 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. You can also limit which objects are selected so that you don’t overload the storage memory of your mobile device.
- Define which objects should be stored in your local folder (offline). By default, all objects of your application are included in the folder. If you exclude some objects from your local folder, 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 folder, 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. 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 folder	Only objects created by given users	Only records created during last days	Desired amount of records in folder[max is 5000, or 500 for events/tasks]	Real object amount	Status
Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="360"/>	<input type="text" value="2000"/>	26	In folder
Contact	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="360"/>	<input type="text" value="2000"/>	20	In folder
Opportunity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="360"/>	<input type="text" value="2000"/>	14	In folder
Campaign	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="360"/>	<input type="text" value="2000"/>	3	In folder
Contract	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="360"/>	<input type="text" value="2000"/>	2	In folder
Case	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="360"/>	<input type="text" value="2000"/>	29	In folder
Solution	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="360"/>	<input type="text" value="2000"/>	3	In folder
Product2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="360"/>	<input type="text" value="2000"/>	7	In folder
Document	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="360"/>	<input type="text" value="2000"/>	9	In folder
Visit__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="360"/>	<input type="text" value="2000"/>	2	In folder
Lead	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="360"/>	<input type="text" value="2000"/>	12	In folder
Application__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="360"/>	<input type="text" value="2000"/>	3	In folder
testc__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="360"/>	<input type="text" value="2000"/>	9	In folder
Event	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="30"/>	<input type="text" value="200"/>	1	In folder
Integrate events with Pocket Scheduler			<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"/>	0	In folder
Integrate events with Pocket 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 folder

You can define which objects included in your application (Leads, Events etc.), should be stored in your local folder (by default all objects of your mobile application are included). If you exclude

some objects from your local folder, you will still be able to access them, when you are working online.

Important:

- Events and Tasks must be included in the folder 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 the mark the given integration option

Wstawic tu kawalek screen z checkboxem do integracji

Selecting the records from the folder objects

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 folder (individually, for any object included in the local folder).

For each object you can define:

- If 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 which 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 folder 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 the folder 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 contents of your folder), 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 entering your login credentials, the system will display within a number of seconds, a page 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 you application (by default the system uses the name of your Salesforce.com application)

Your Salesforce.com applications

Sales

Name of your mobile application

Sales

Object list

Object type name	Include into your application	Include in the folder	Only objects created by given users	Only records created during last days	Desired amount of records in folder [max is 5000, or 500 for events/tasks]	Real object amount	Status
Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	26	In folder
Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	19	In folder
Opportunity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	14	In folder
Campaign	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	3	In folder
Contract	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	2	In folder
Case	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	28	In folder
Solution	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	3	In folder
Product2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	7	In folder
Document	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	360	2000	9	In folder
Visit__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	2	In folder
Lead	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	12	In folder
Application__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	3	In folder
testc__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	9	In folder
Event	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30	200	0	In folder
Integrate events with Pocket Scheduler			<input type="checkbox"/>				
Task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30	200	0	In folder
Integrate events with Pocket 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 folder
- The objects in any folder contain only records you created, and not records created by other people, even if you have right to see them
- The folder 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 folder 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 changing 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 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 folder.
- b) You change object(s) which should be included in your folder (include or exclude an object - the second column checkbox). In this case you will be requested to download the new folder, 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 the data.

In cases a) and b), you will have to download the newly defined folder. Due to this mandatory download, PLEASE synchronize your data BEFORE changing the folder parameters (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 though such a profile exists, and even if there are users assigned to this profile, the system isn't able to gain 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 define 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 inform users responsible for configuring the application, that they can go to the configuration site and can configure their applications. Once completed, the system will inform 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 folder (objects to be included in the folder, definition which records have to be included in the folder, etc.), and not the application itself, the system will ask if the changes in the folder definition concern all users who can use the application (default), or only selected users (in such case the folders of other users will not be changed).
- If the changes will not only concern the 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).

General information

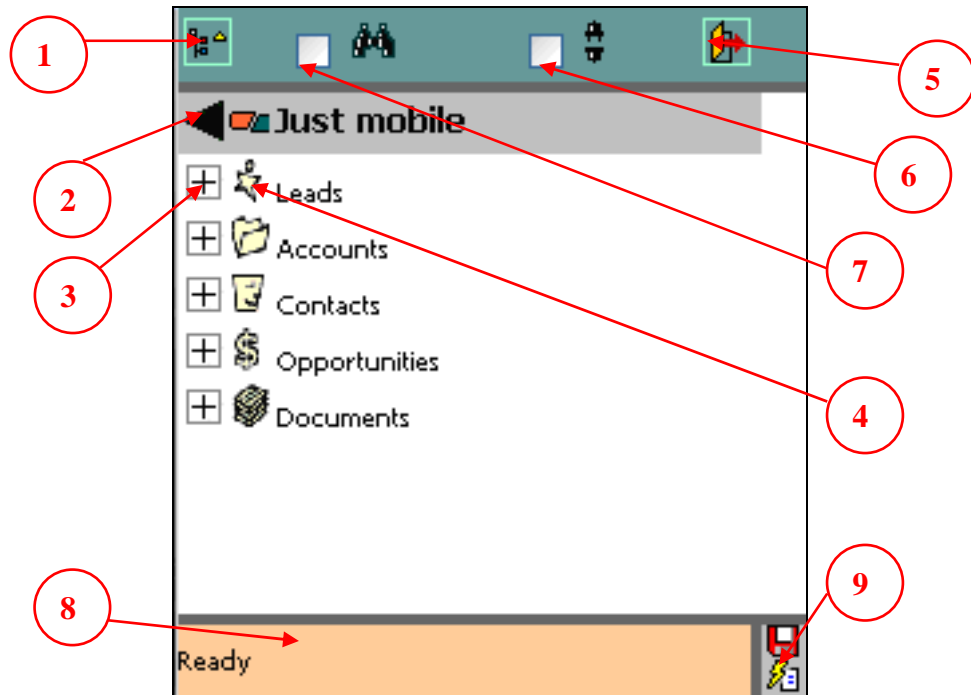
Working with your mobile application, you have access to your Salesforce.com data through two different views:

- 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.

Structure of the application window



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. **Up one level**
Pushing this button takes you back one level higher
 3. **Down one level**
Pushing this button takes you one level deeper (in this screen example, the system will show you the lead list)
 4. **Down one level (with select)**
Pushing this button you go one level deeper (in this case the system will show you the lead list).
- Despite similar functionality, the following are the differences between the buttons 3 and 4:
- Button 3 shows the list of the last selected objects while button 4 selects the objects (if the filter is set, it also displays the filter giving you the possibility to search)
 - If you are online, button 3 doesn't access the server (it just shows the last selected objects). Button 4 accesses the server and downloads new objects from the server.
5. **Toolbar area**
 6. **Online/offline checkbox**

The system shows current status (online/offline). You also can use it to set the desired status.

7. Filter checkbox

If the check box is set, pushing button 4 will display a filter form, giving you the option to search for specific, filtered data.

Important: that button doesn't influence the behavior of the button 3, which always shows the last records selected, independent if the filter checkbox is set to on or off.

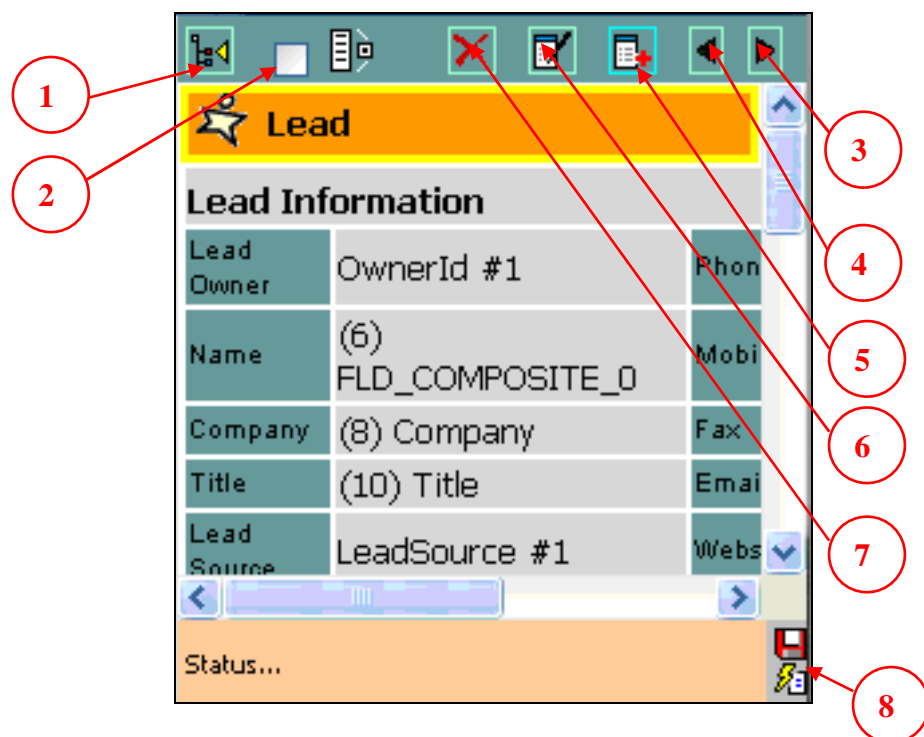
8. Messages / information area

In this area the system displays information about its' current status.

9. Quick menu

Once you press the "Quick Menu" button, you can find functions for "Synchronization", "Folder manager", etc.

Form view



The elements in the screen above have the following functions:

1. Back to the tree structure

Pushing the button takes you back to the main menu of the application

2. Checkbox for "easy form"

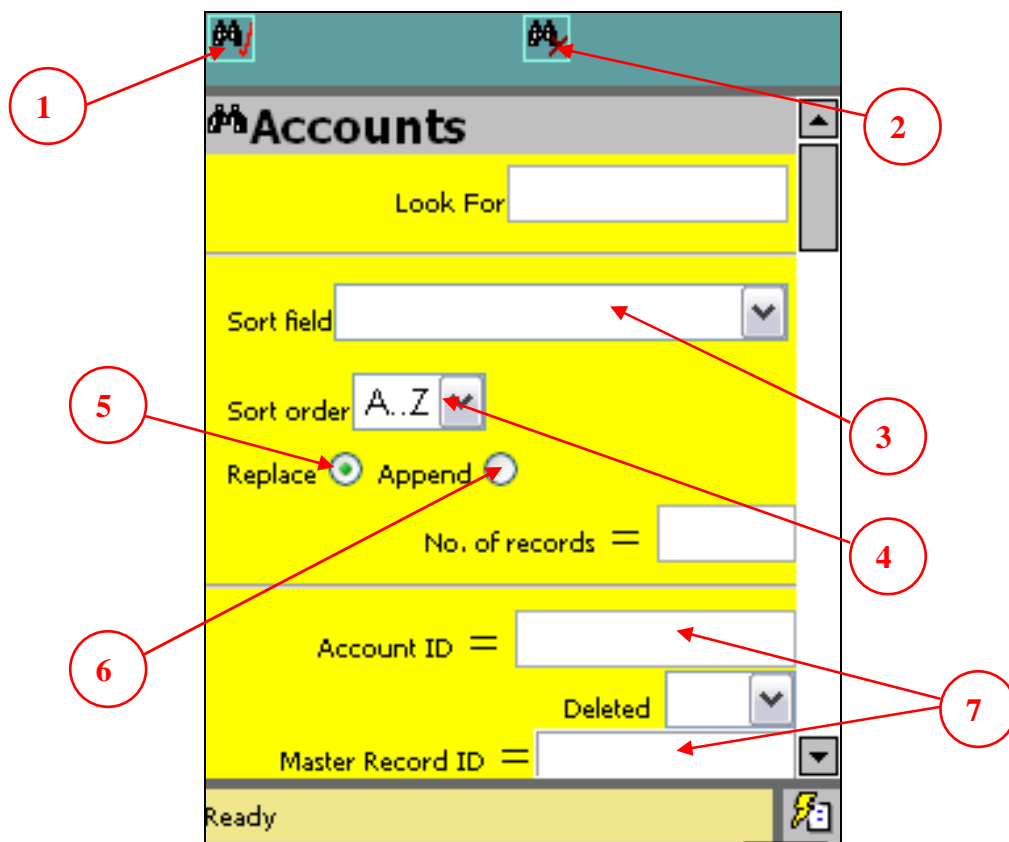
If this checkbox is set, the system doesn't display all fields contained in the form but only the most important ones. As most forms contain many fields, "easy forms" can help you to make the system more usable on small handheld screens. If you wish to

see all fields again, you simply have to deselect the checkbox.

Important: This functionality is not included in the standard account. If you need it, please ask for an "Extended account".

- 3. Move to next record
- 4. Move to previous record
- 5. Add new record
- 6. Edit current record
- 7. Delete current record
- 8. Quick menu

Filter view



The elements on the screen above have the following functions:

1. Search button – with filter

The system searches for the data using the filter definition.

Important:

- *If you are using the folder, the system searches in the local database on your local device.*
- *If you do not use the folder, the system searches on the server if you are online or locally if you are offline.*

2. Search button – no filter

The system is searching for the data, while ignoring the filter definition.

Important: the rules for searching locally or on the server are the same as describe above.

3. Sort field

You can select a field to be used for sorting.

4. Sort order

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

5. “Replace” radio box

If it is set to on - the newly loaded data will replace the existing data on the screen of your mobile device (you will see only the new data – the “old” data will disappear).

6. “Append” radio box

If it is set to on, the newly loaded data will be added to the data previously displayed on your screen (you will see the existing and the new data).

7. Fields from the current object

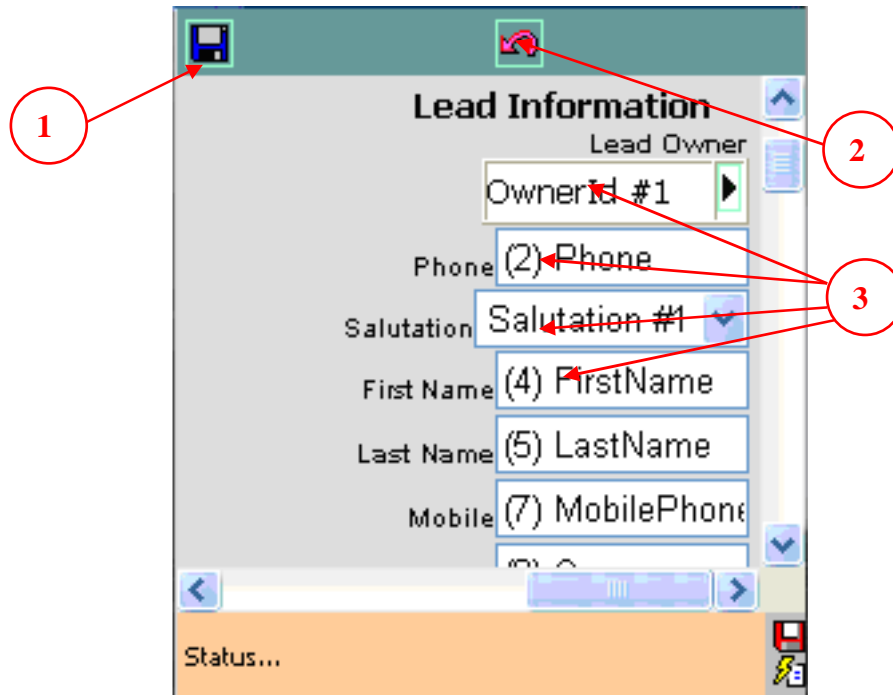
Fields from the current objects – you can define values in the fields as a searching criteria. You can also use wildcards, for example:

City = Los Angeles

City = Los A*

City = L*A*

Edit view



The elements in the screen above have the following functions:

1. **Save**
If you press this icon, all the changes you have made will be saved (locally, if you are using the folder or are working offline, or on the server if you are working online and do not use the folder)
2. **Cancel**
If you press this icon, all your changes will be ignored (not saved)
3. **Fields of current object**

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.

Important:

- You can use Pocket Calendar and Task Manager for managing your Salesforce.com events and tasks only if you use folders.
- You can use Pocket Calendar and Task Manager for managing your Salesforce.com events and tasks, only if you are using Windows Mobile 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 folder, 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 folder, 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.

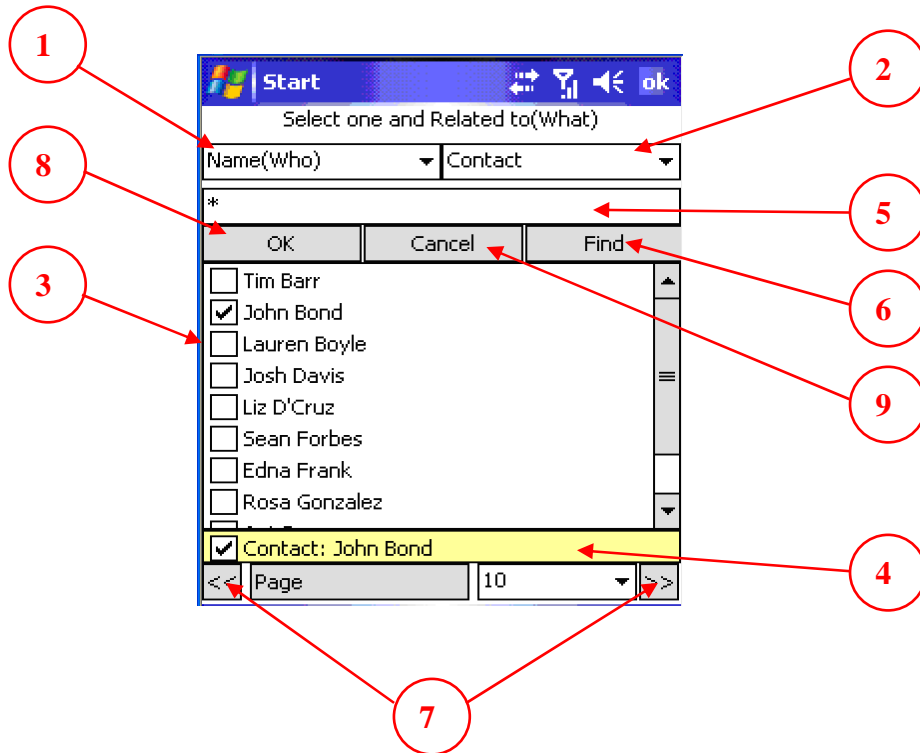
Creating a new event

To create an event in Salesforce.com, simply do exactly as you would to create any other event.

There are only two differences:

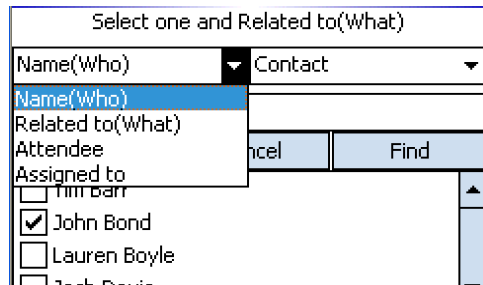
- Don't define attendees
- Don't forget to set the events category to SALESFORCE

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.

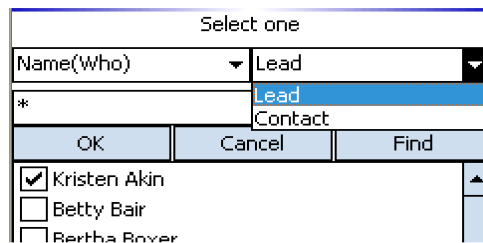


1. List of operations

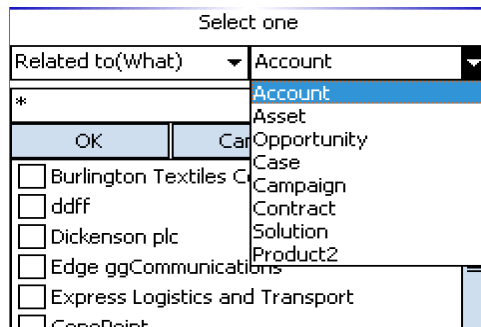
You can decide with **Who**, or **What**, you wish to associate the event, select attendees, or assign the event to a Salesforce.com user.



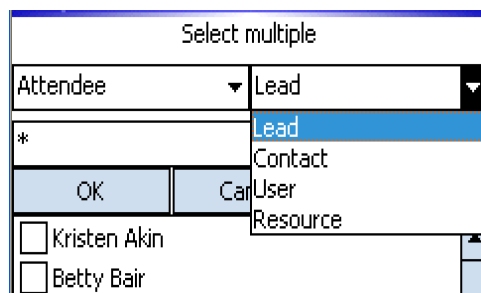
In the case of **Who**, you can select between a **Lead** and a **Contact**.



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 local Salesforce.com folder.

9. Cancel button

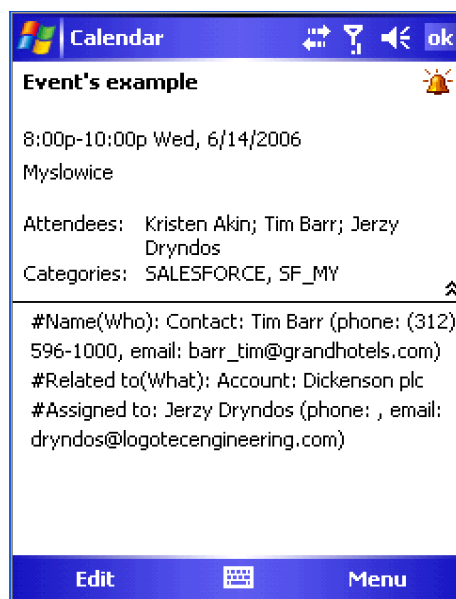
Pushing the button closes the window. The changes are canceled.

After you accept the changes the system saves the associations to the Salesforce.com folder 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 folder. 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 folder (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 folder 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 folder, 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 folder and the online mode is switched to “on”, you are working online. There is only one, small exclusion that is described in the chapter “Using your mobile application”.
6. If you are using the local folder, 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 folder off. You don't have to delete it, but simply switch it off. You can switch the folder on again at any time (Quick menu > folder manager > selecting/deselecting a folder).

Offline mode

If you are using the local folder 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 folder, can be found in the chapter “Folders”.
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 folder specification. Example:

- if you have specified that your folder 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 folder (recommended) than when you are working without local folder.

Working without the folder

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 folder

When working with the data saved in a folder, 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!

Folder

A folder is a set of data stored locally. If you start your application for the first time, the system downloads the folder automatically. If you change the definition of your folder thereafter, you can download the folder manually (Quick menu > Folder manager > 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 folder mode. Without using folder(s), you will not have access to the data from these objects. As is the case with any objects contained in folder, 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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