TeamViewer

Salesforce Integration

Configuration Guide

Rev 3.0-10/27/202020

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1 Introduction

1.1 About TeamViewer for Salesforce

The TeamViewer integration for Salesforce embeds TeamViewer remote control functionality into your Salesforce Service and Sales Cloud environments.

- Create and join a support session directly from a Salesforce case, account, lead, opportunity, contacts, and other custom objects added as supported objects.
- Remotely control the customer's device
- Remote Control Sessions automatically added to the Connection report in the TeamViewer Management Console
- Create consolidated reports about your company's TeamViewer connections.
- View a device list (Correct naming is needed… AVE)
- Support for Pilot Sessions

With TeamViewer, you can easily create TeamViewer Service Cases and provide remote support right from various Salesforce objects such as cases, leads, accounts, opportunities, contacts, and custom objects. The remote troubleshooting experience is improved by optimizing communication between users and Call Center staff. Remote control has been proven to increase efficiency of service desks and improve customer satisfaction significantly.

1.2 About this manual

This manual describes the installation and configuration of the TeamViewer App for Salesforce Cloud. Moreover, it provides a short overview of the various features provided by the application.

2 Installation

2.1 Getting the TeamViewer App

The TeamViewer App is available on Salesforce AppExchange:
https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EFmSYUA1

Or you can go to https://appexchange.salesforce.com/ and search for “TeamViewer” on the Apps search field.

2.2 Performing the installation

Before starting the installation process of the TeamViewer package, the Chatter feature must be enabled. Please review the configuration settings mentioned in 3.1 to find out how to enable the Chatter feature for your org.

2.2.1 Starting the installation

Once you are at the TeamViewer Listing page on the AppExchange, select the “**Get It Now”** button on the top right corner of the Listing as shown in Figure 1 below.

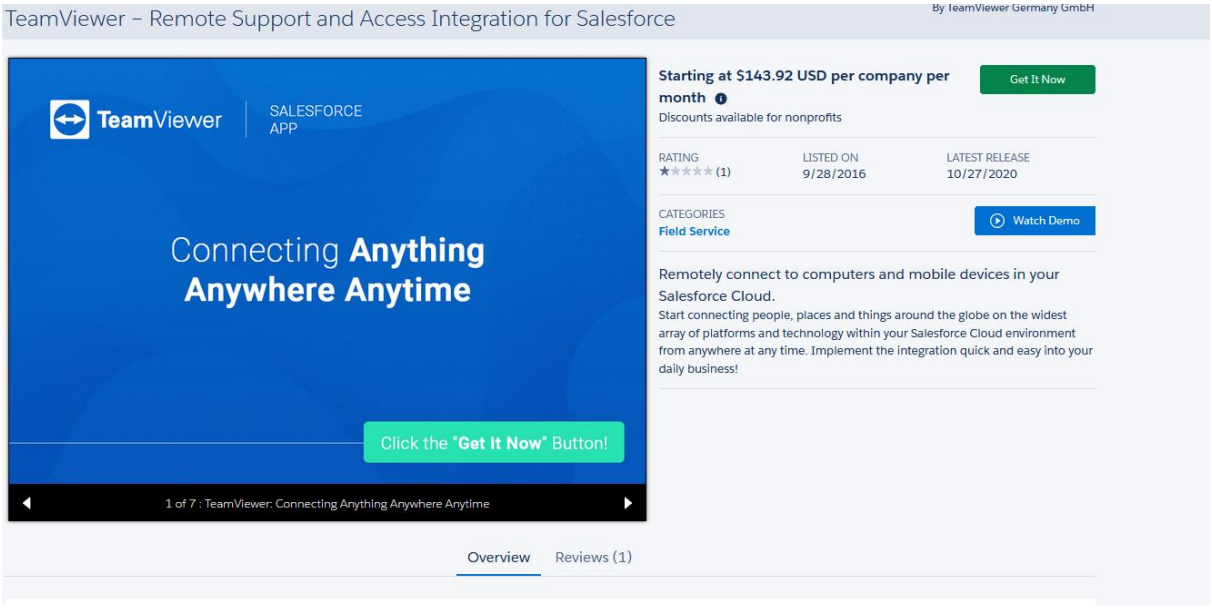


Figure 1

2.2.2 Selecting the Salesforce Org to install to

Once you have selected to download TeamViewer, you should see the options presented in *Figure 2* to select the type of Salesforce Org you want to install into.

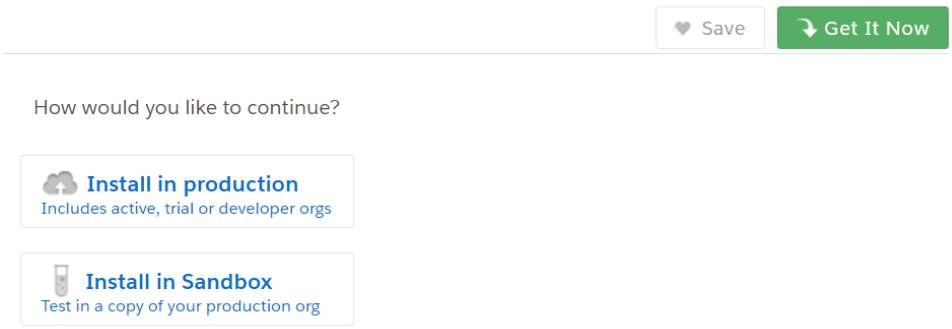


Figure 2

Note: If you're installing into a sandbox, replace the www.salesforce.com portion of the installation link with test.salesforce.com. The package is removed from your sandbox organization whenever you create a new sandbox copy.

For the purpose of this document, we will assume that the user selects to 'Install in Production', which will be the most common case.

Once you have selected the type of Org, you will be prompted to login to the org you want to install into with your Salesforce credentials.

2.2.3 Selecting who to make the app available for

Once you have logged in, you will see the following options (Figure 3) with regards to who to make this app available for.

For TeamViewer for Salesforce Cloud app, you should choose the option "Install for All Users" - as it's an application that is intended to be used by everyone who is working on Customer Service or Sales roles – and click the **Install** button.

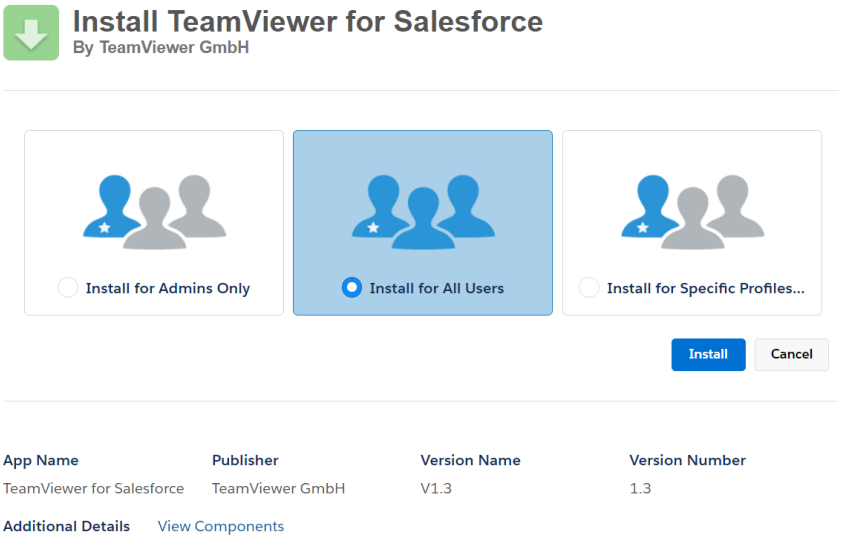


Figure 3

2.2.4 Confirming the installation

Once you have selected to install the app on the previous step, you will be presented with the notification screen to allow TeamViewer to contact 3rd party websites, as shown in Figure 4. This is required in order for TeamViewer to function properly as it needs to contact the TeamViewer servers to set up remote connections.
Absolutely no data outside what is needed to setup the remote control session will be sent to TeamViewer Servers.
Enable the "**Yes, grant access to these third-party web sites**" checkbox and click the **Continue** button.

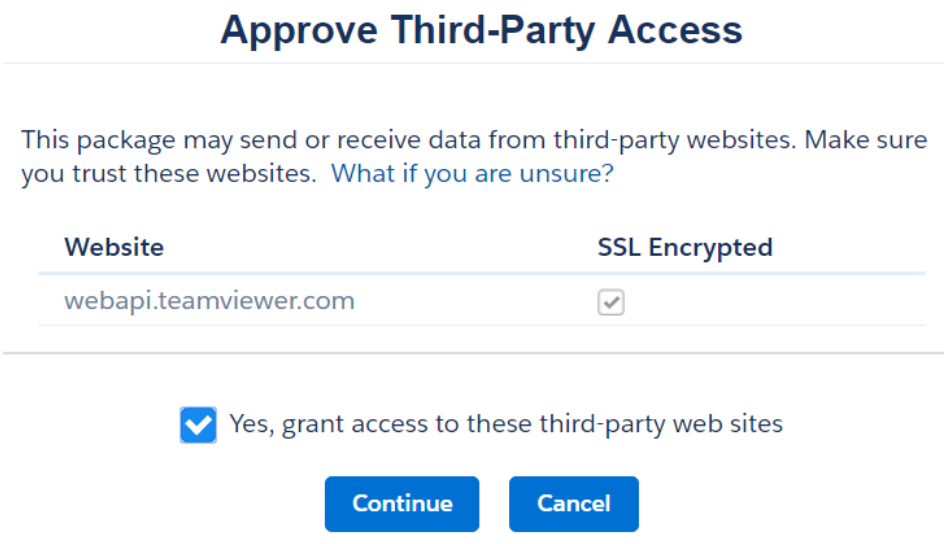


Figure 4

Following the previous step, you'll see a message that describes the progress and a confirmation message after the installation is complete.

In addition, you'll get a confirmation message to your Salesforce Org linked email account as below.

```
Your request to install package "TeamViewer for Salesforce V2.122"
was successful.


Organization: Organization (000000000001234)

User: Username (000000000001235)

Package: TeamViewer for Salesforce (000000000001236)


Some components, such as custom objects, custom report types, and
workflow rules, must be activated using the package deploy process,
before they are available to your organization.
```

2.3 Uninstalling TeamViewer from your Salesforce Org

Note: Before uninstalling the app, you will have to unassign the permission set and remove the components from page layout.

To uninstall TeamViewer from your Salesforce Org, go to Setup → Build → Installed Packages, choose the package "TeamViewer for Salesforce" and click uninstall.

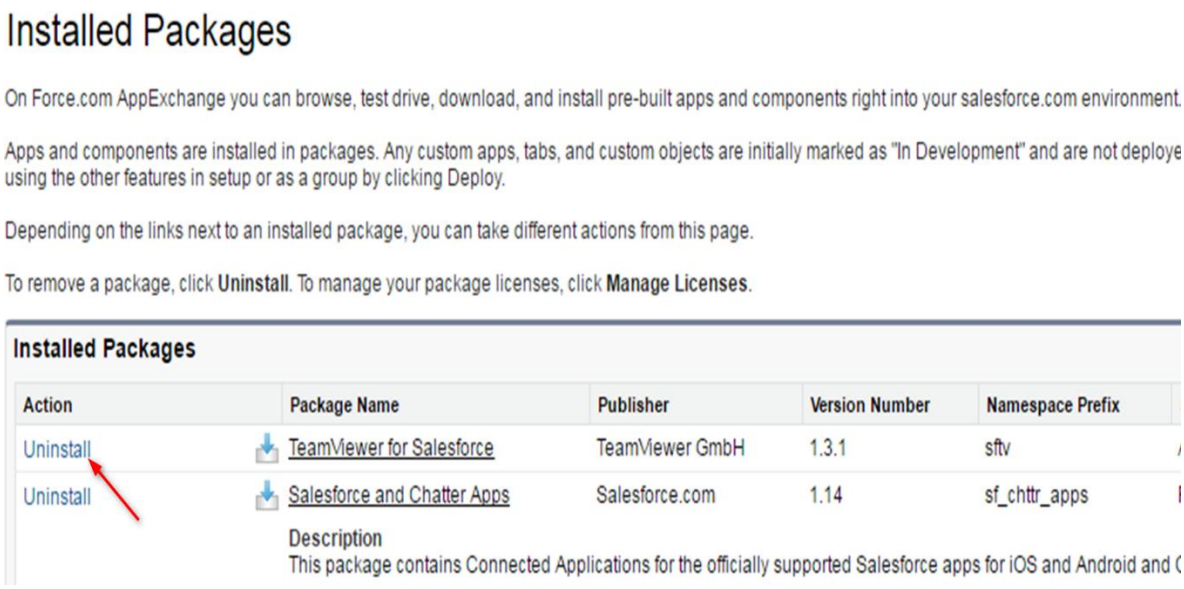


Figure 5

3 Configuration

This section describes how to configure the Page layout in the Cases screen to display the main TeamViewer components as well as how to make sharing the session code easier through email or chatter templates.

3.1 Configure chatter

Go to Setup → Chatter → Chatter Settings and enable the Chatter feature in general (must be done before installation). To view the quick actions, you need to enable "**Actions in the Publisher**" setting.

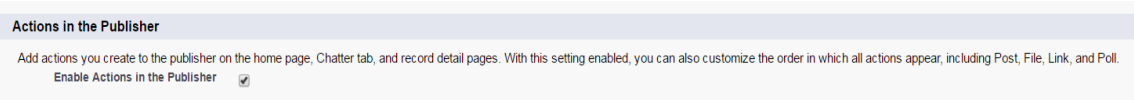


Figure 6

3.2 Assigning permission set

There are 2 permissions set available with package – TeamViewer Administrator and TeamViewer user. Admin is able to assign one of this permission set to user.

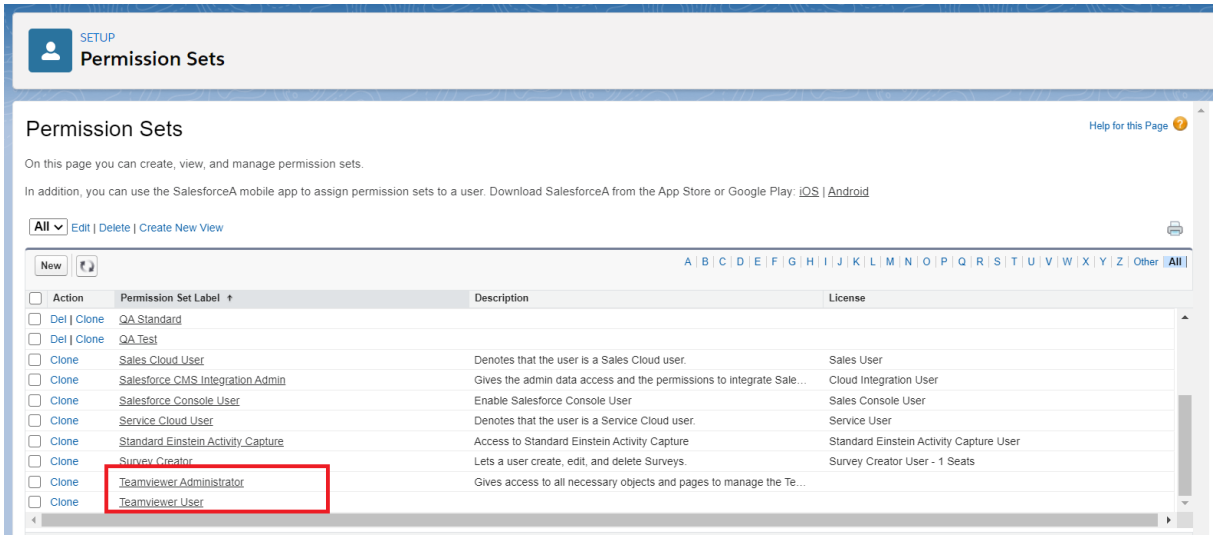


Figure 7

1) Click on one of the permission sets e.g., TeamViewer User.
2) Click on “Manage Assignments”.

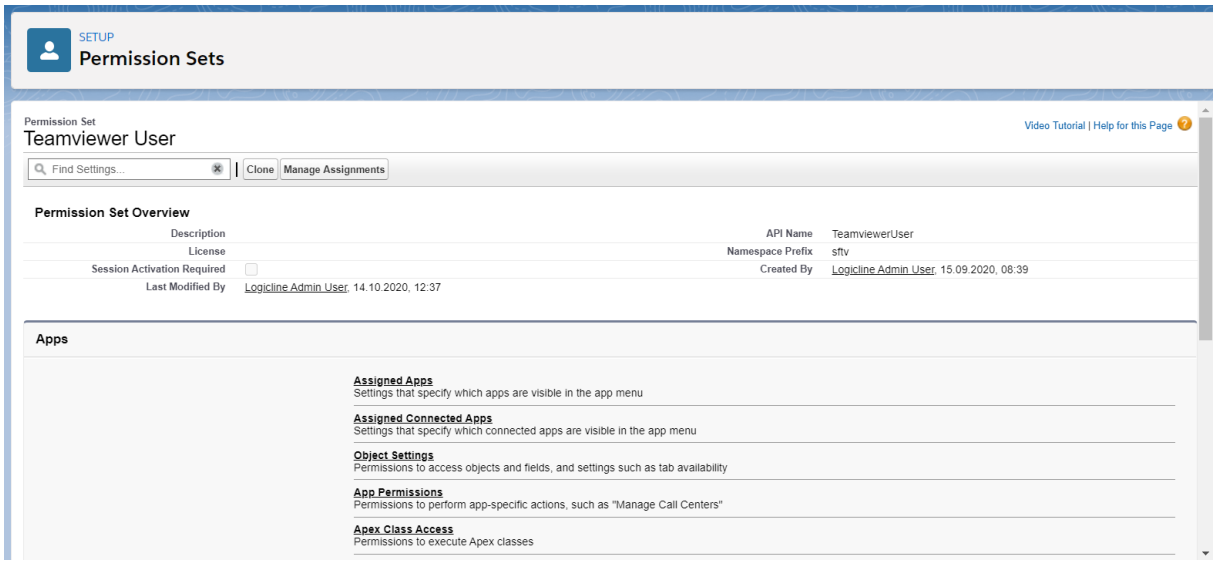


Figure 8

3) Click on “Add Assignments”.

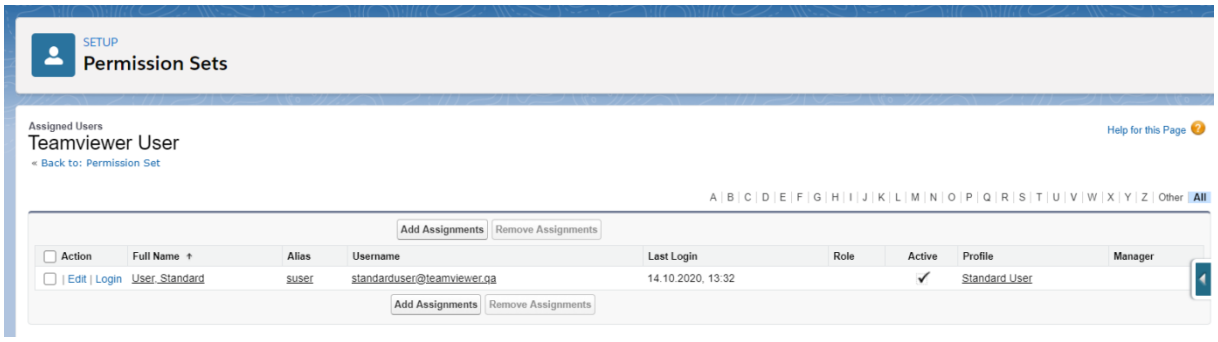


Figure 9

4) Select one of the users and click on “Assign” button.

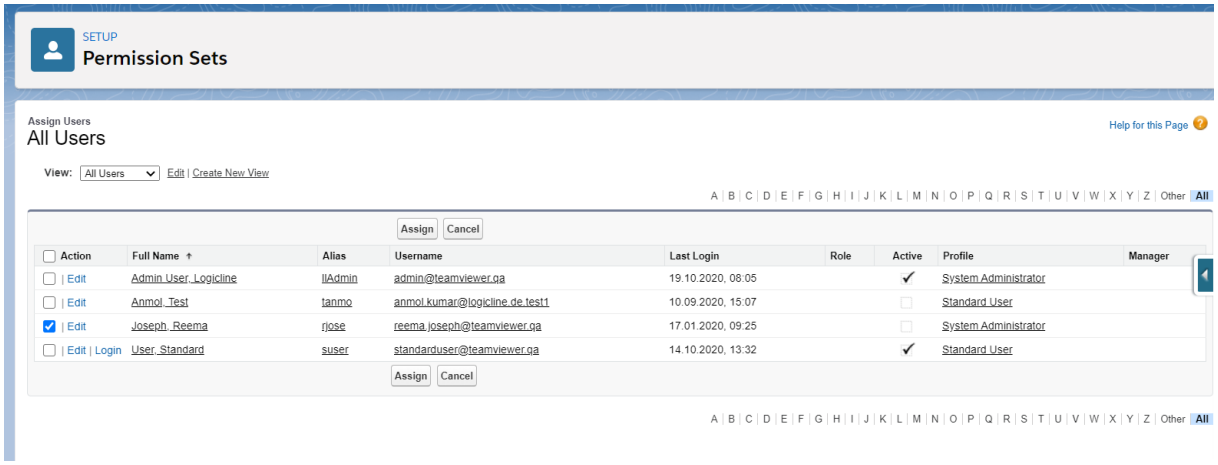


Figure 10

3.3 Configuring the page layout

In order to view the TeamViewer components and make it seamless and intuitive for your users to take advantage of the TeamViewer features, you will need to customize each object page layout to make the TeamViewer component visible. There is complete flexibility on how to present TeamViewer, but we have included below an example of a fairly standardized configuration for each object.

Below are some examples of TeamViewer components layout in cases for Salesforce Classic and Lightning experience mode.

Salesforce classic

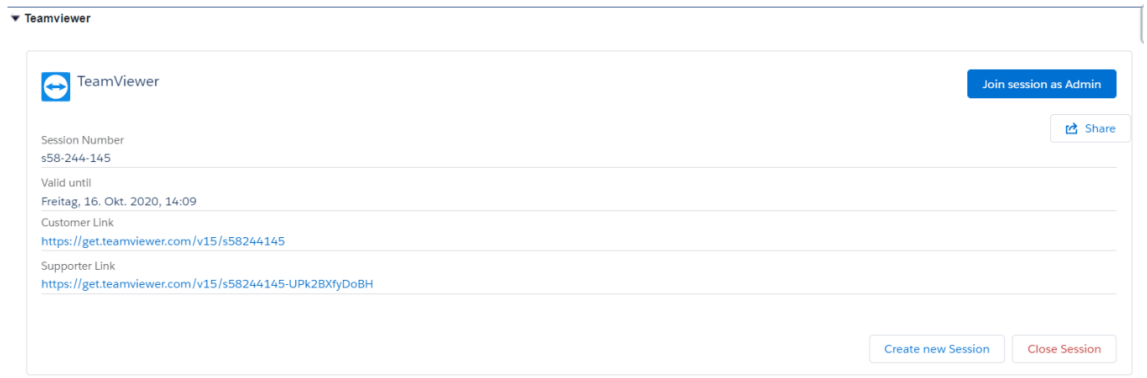


Figure 11: TeamViewer Session details in Salesforce classic

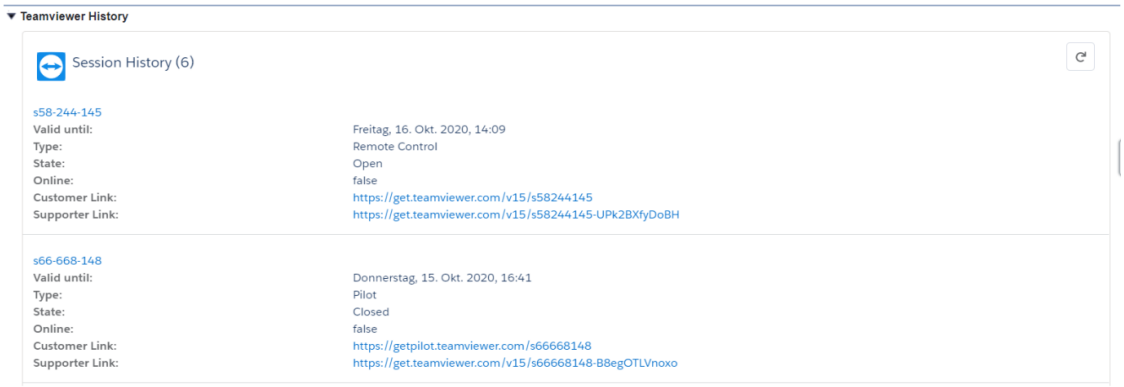


Figure 12: TeamViewer Session history in Salesforce classic

Salesforce Lightning

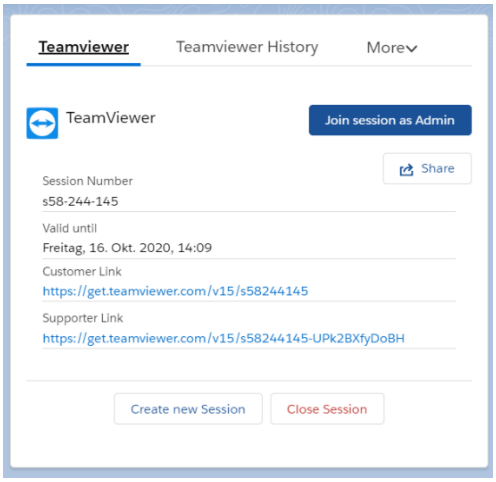


Figure 13: TeamViewer Session details in Salesforce ligthning

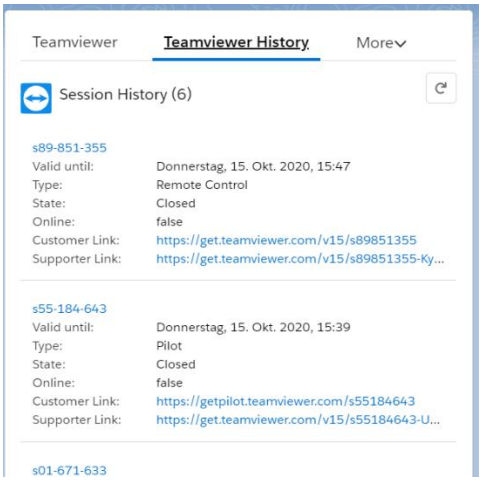


Figure 14: TeamViewer Session history in Salesforce lightning

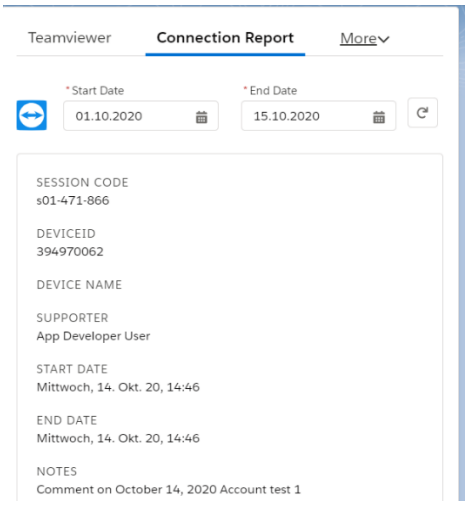


Figure 15: TeamViewer Connection report per case

3.3.1 Example flow to add the TeamViewer components to the Case page layout in a salesforce lightning environment

1) Open a case record in Lightning.
2) Click on the gear icon on top right of the page and select “Edit Page”.
3) The edit page will have 6 custom managed components provided from TeamViewer:
   a) Connection Report
   b) Session
   c) Session History
   d) TeamViewer unattended access
   e) xAssist Call
   f) xAssist Report

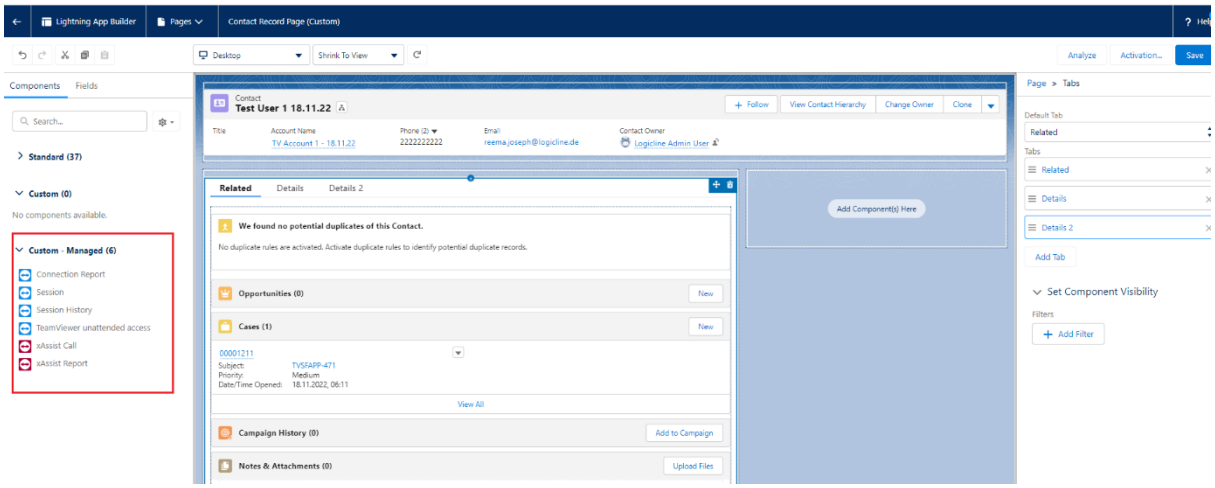


Figure 16

4) The User is able to drag and drop these components to anywhere on the page layout.
5) We recommend adding these components to a new tab, click on “Add Tab” button.

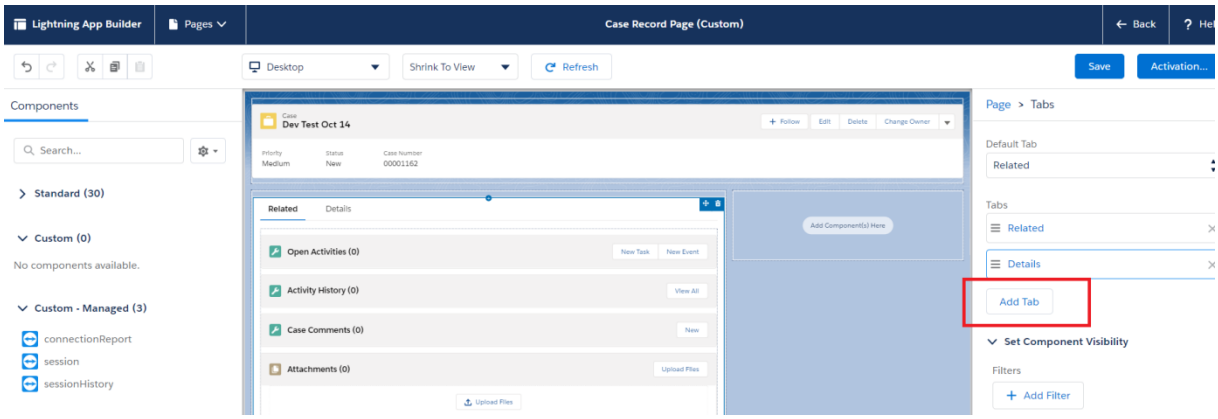


Figure 17

6) Click on the newly added tab from tab list on right hand side. Click on “Details” and select “Custom”.

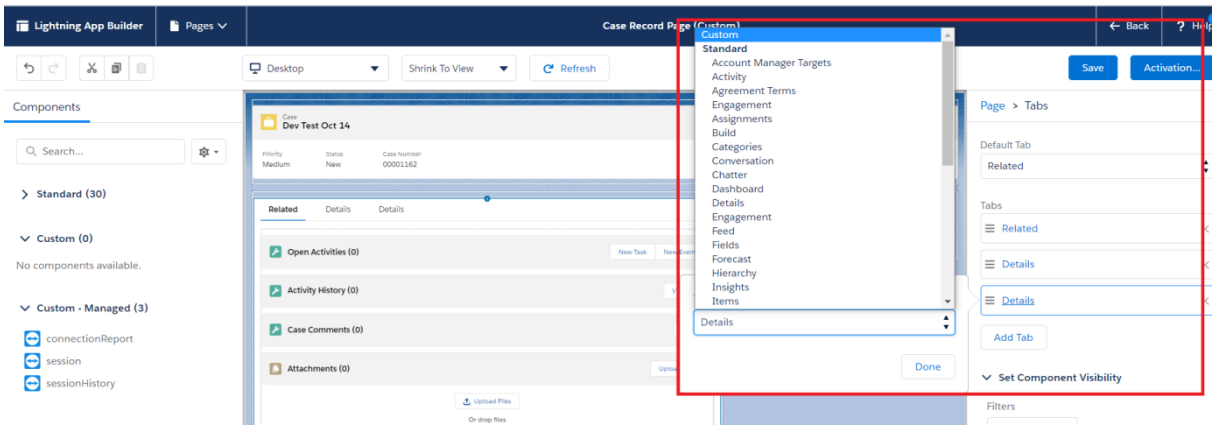


Figure 18

7) In “Custom Label” field give the tab name as “TeamViewer Session” and click on “Done”.

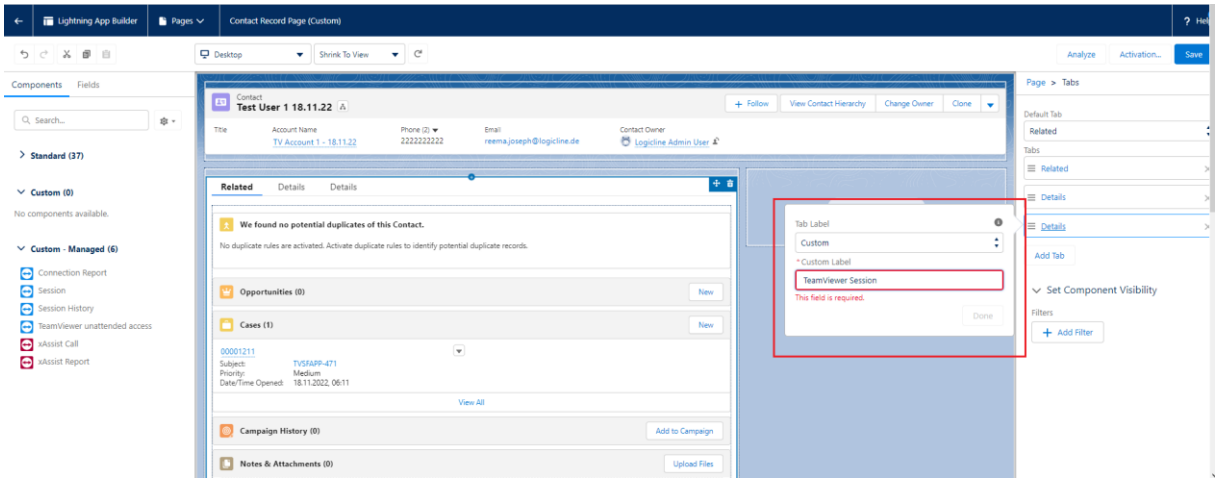


Figure 19

8) Click on the added tab on page layout and drag and drop “Session” component to it.

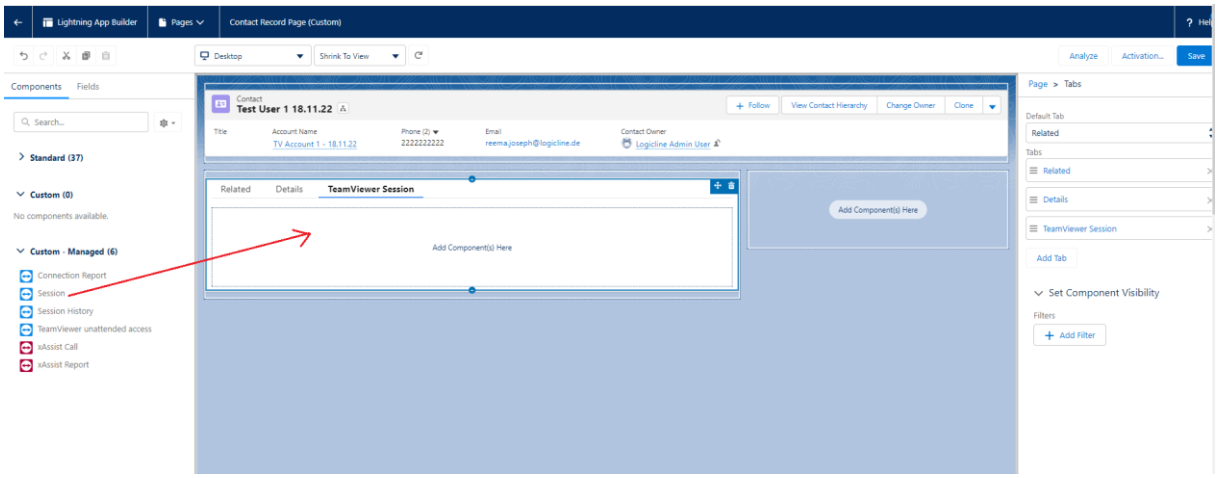


Figure 20

9) Add another tab for history with name “TeamViewer History” (Click on Add Tab button -> Select the newly created tab from right hand side -> Click on Details -> Select Custom -> Fill name as TeamViewer History -> Click on Done button).
10) Click on the newly created tab and drag and drop Session History component to it.

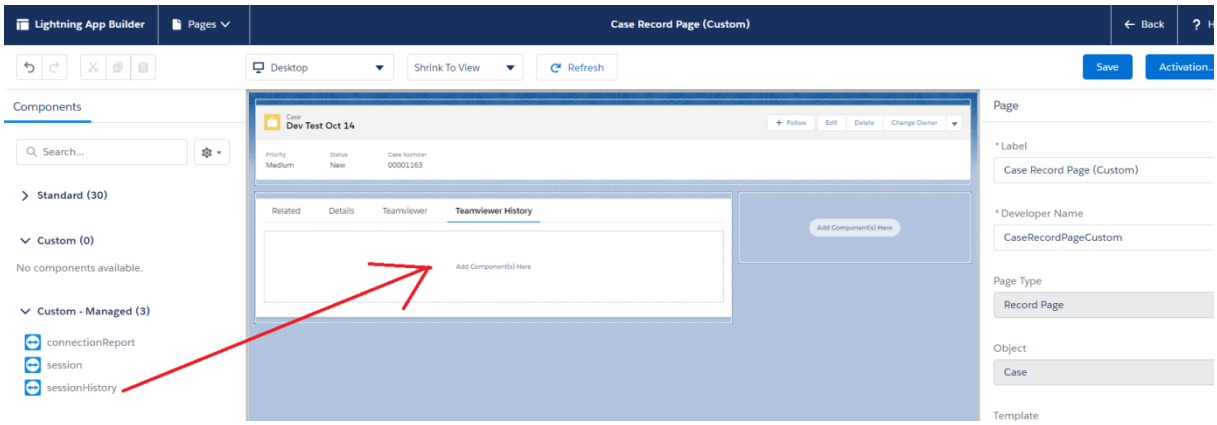


Figure 21

11) Add a new tab named “Connection Report” (Click on Add Tab button -> Select the newly created tab from right hand side -> Click on Details -> Select Custom -> Fill name as Connection Report -> Click on Done button).
12) Click on the newly created tab and drag and drop Connection Report component to it.

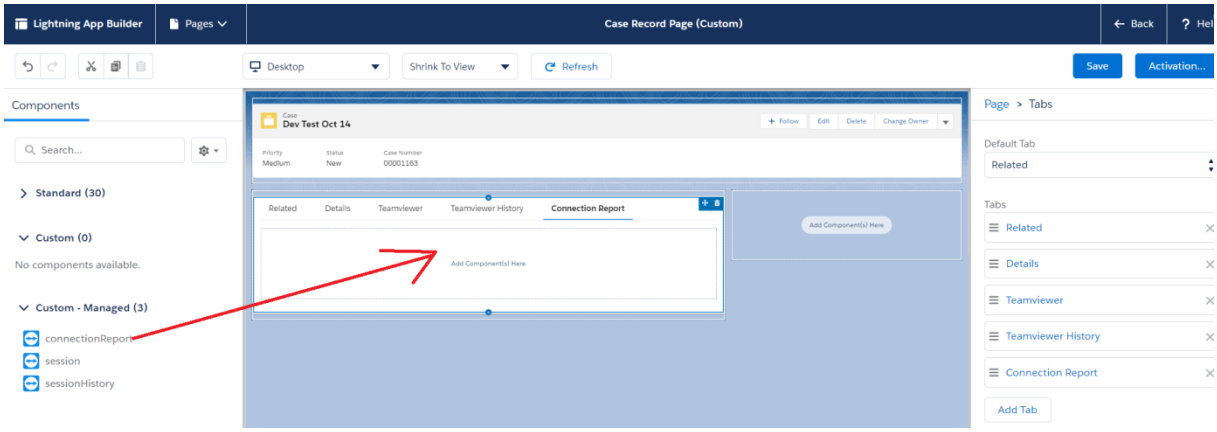


Figure 22

13) The connection report can have 2 forms – Desktop and mobile. By default, the value will be Desktop.

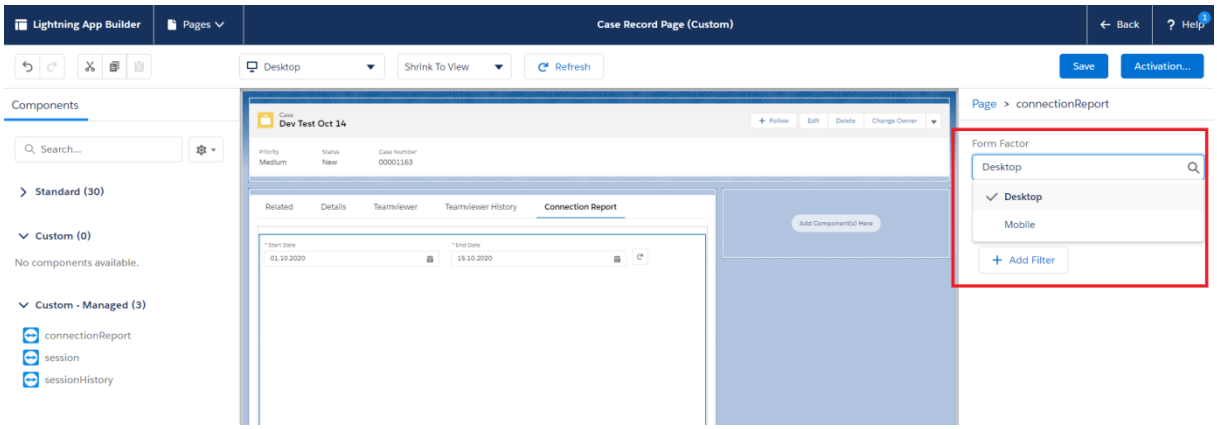


Figure 23

14) Add a new tab named “xAssist Call” (Click on Add Tab button -> Select the newly created tab from right hand side -> Click on Details -> Select Custom -> Fill name as xAssist Call -> Click on Done button).
15) Click on the newly created tab and drag and drop xAssist Call component to it.

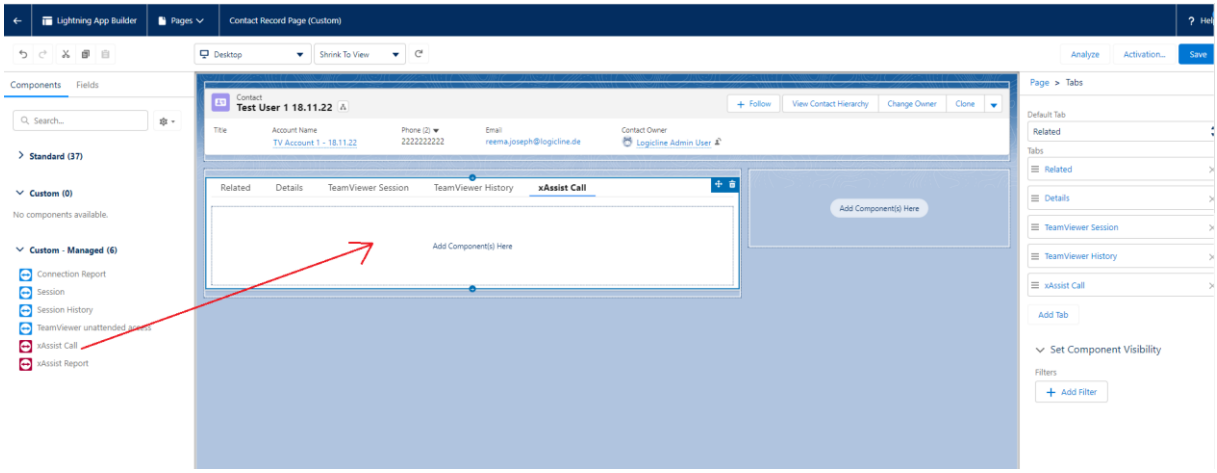


Figure 24

16) Add a new tab named “xAssist Report” (Click on Add Tab button -> Select the newly created tab from right hand side -> Click on Details -> Select Custom -> Fill name as xAssist Report -> Click on Done button).
17) Click on the newly created tab and drag and drop xAssist Report component to it.

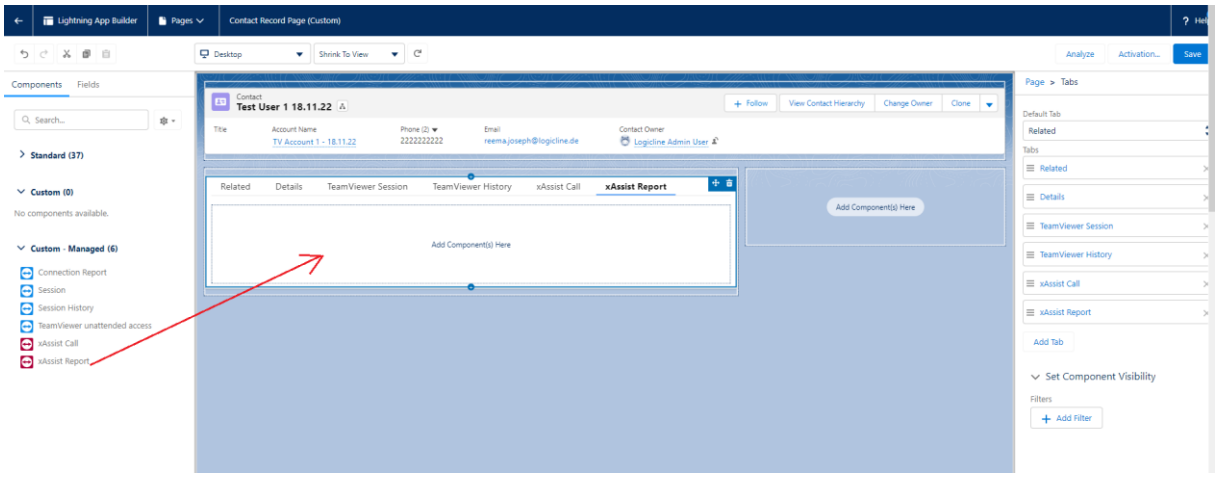


Figure 25

18) Click on “Save” button and then “Back” button.

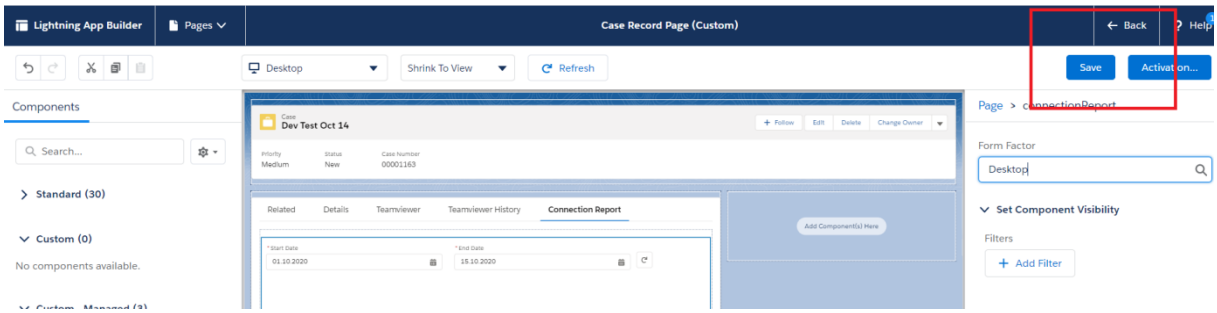


Figure 26

19) This will load the case page with added components.
20) Similar way, add TeamViewer components to other objects like account, contact, lead, opportunities, assets, and custom objects.

3.3.2 Add TeamViewer unattended access to Assets page

1) Open an Asset record.
2) Click on the gear icon on top right of the page and select “Edit Page”.
3) Add a new tab “Unattended access”.
4) Drag and drop “TeamViewer unattended access” to the tab.

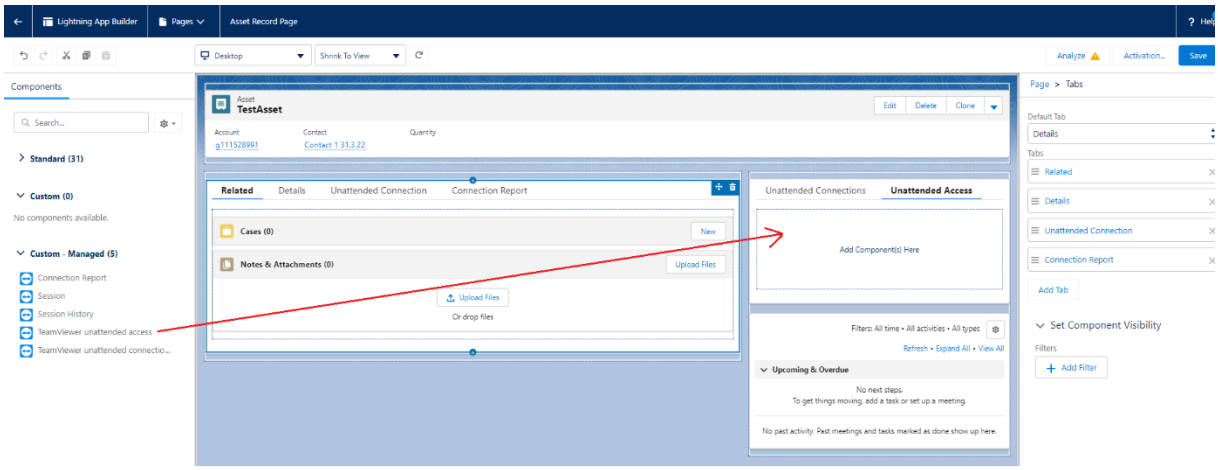


Figure 27

5) Click on “Save” button and then “Back” button.

3.3.3 Add TeamViewer unattended connections to Assets page

1) Open Asset page and select “Edit Page”.
2) Add a new tab “Unattended connection”.
3) Drag and drop “TeamViewer unattended connections” to the tab.

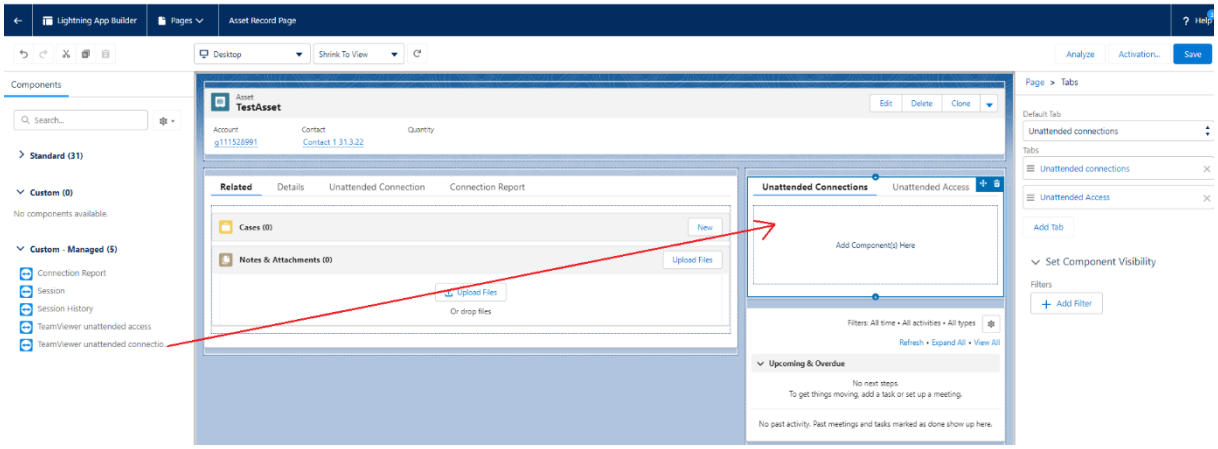


Figure 28

4) Select “Desktop” or “Mobile” from the “Form Factor” dropdown.
5) Click on “Save” and click on “Back.

3.3.4 Example flow to add the TeamViewer components to the Case page layout in a salesforce classic environment

1) In Classic mode, open a case and click on the “Edit Layout” option.

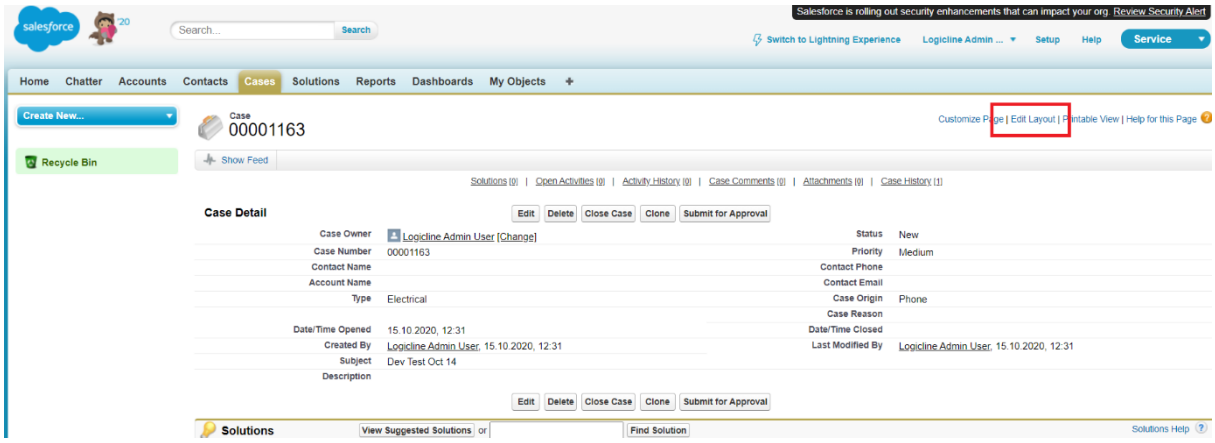


Figure 29

2) Drag and drop the section to the page layout.

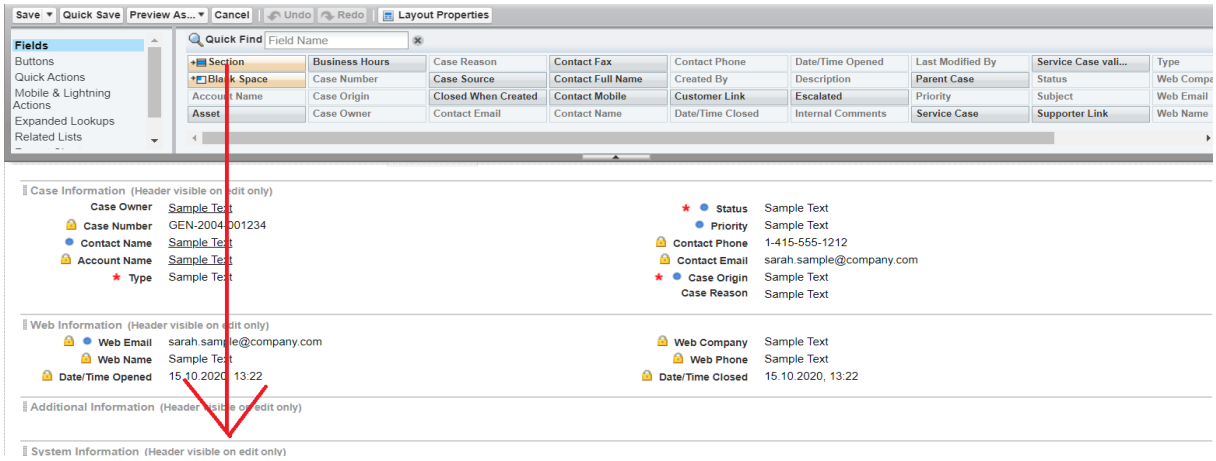


Figure 30

3) Add a section name as “TeamViewer”.

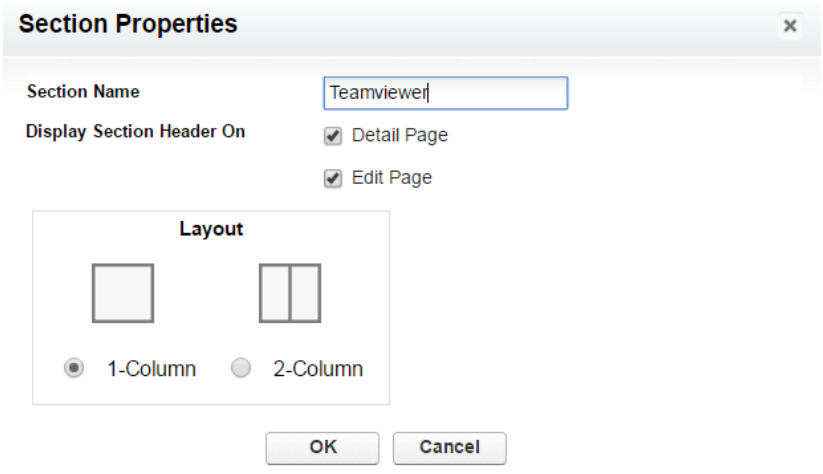


Figure 31

4) Add the Visualforce Page “**Session**” to the new section.

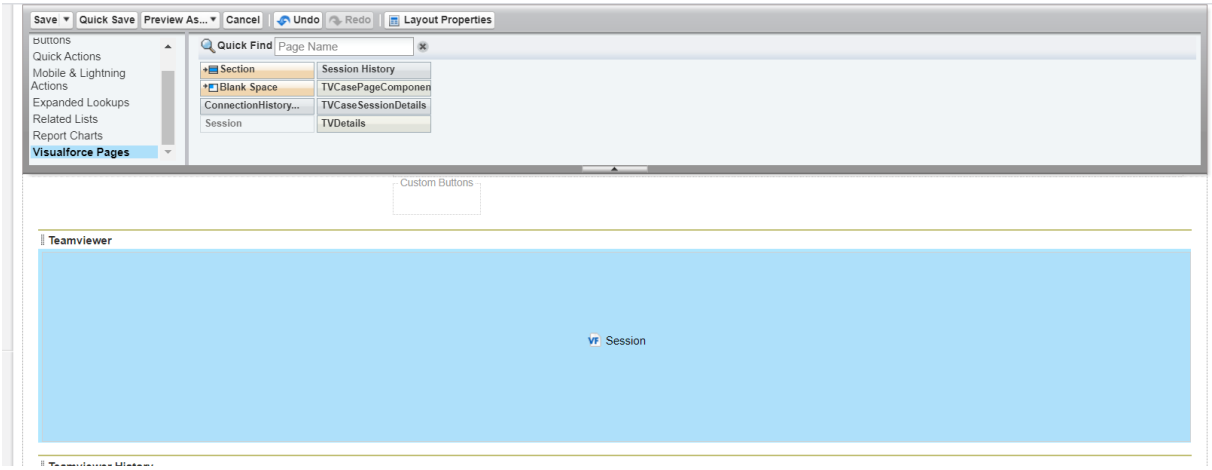


Figure 32

5) The size and the height of the component can be customized. Default height is 200.
6) Add the "**TeamViewer**" quick action.

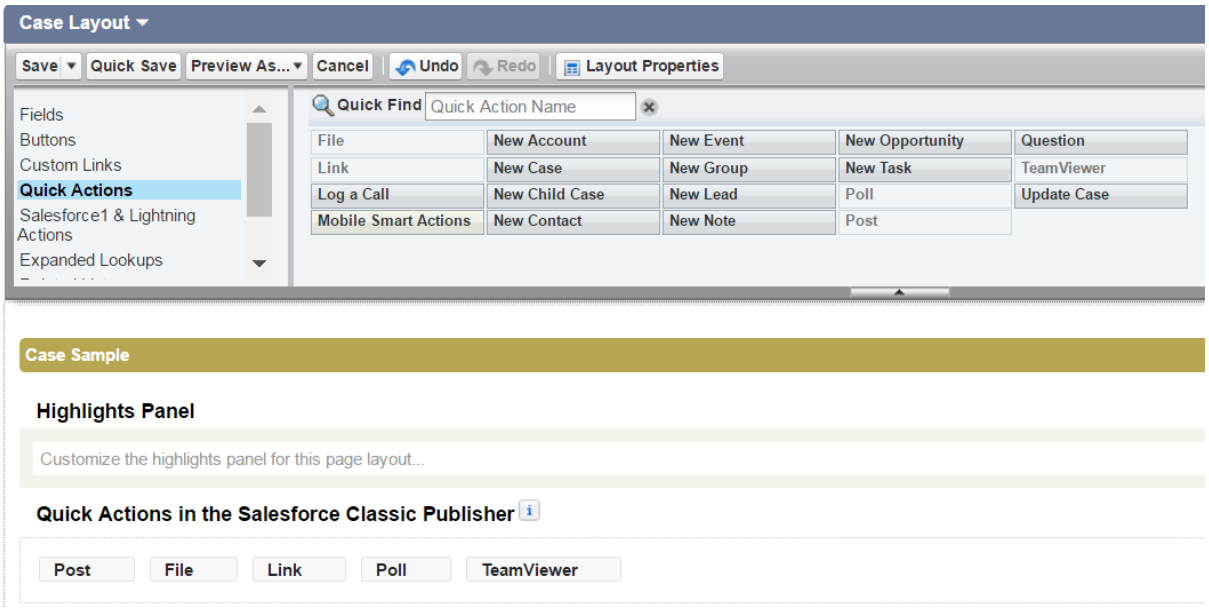


Figure 33

7) Add the TeamViewer History by adding a new section "TeamViewer History".

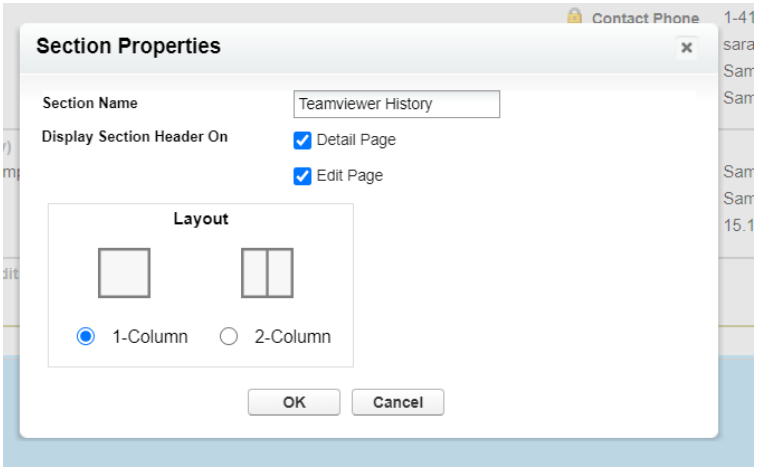


Figure 34

8) Add the Visualforce Page "**Session History**" to the new.

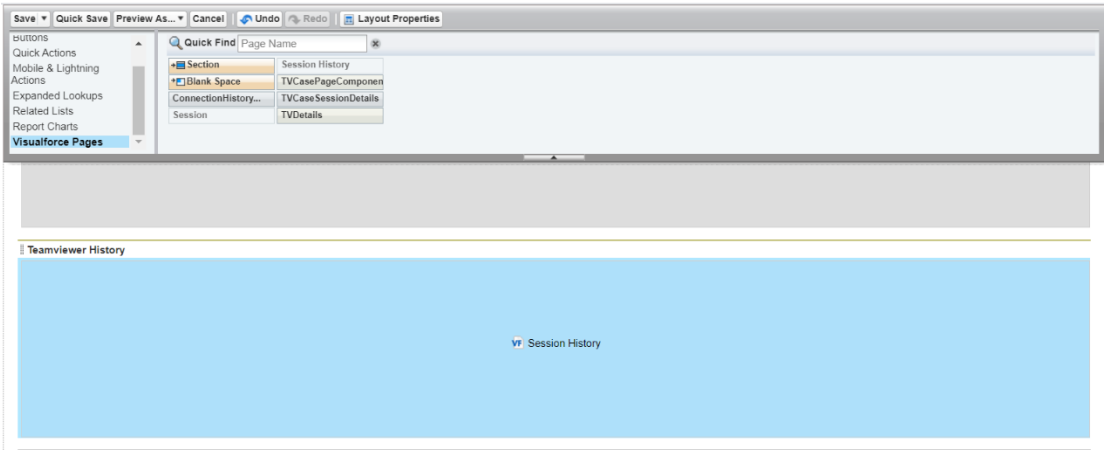


Figure 35

9) Drag and drop the section to the page layout.

3.3.5 Add the TeamViewer xAssist widgets

Note add this only if you want to use TeamViewer Frontline xAssist, a separate license is needed to use this feature)

1) Add a section name as "xAssist Call".
2) Select Layout as 1-Column.
3) Add the Visualforce Page "**xAssist Call**" to the new.

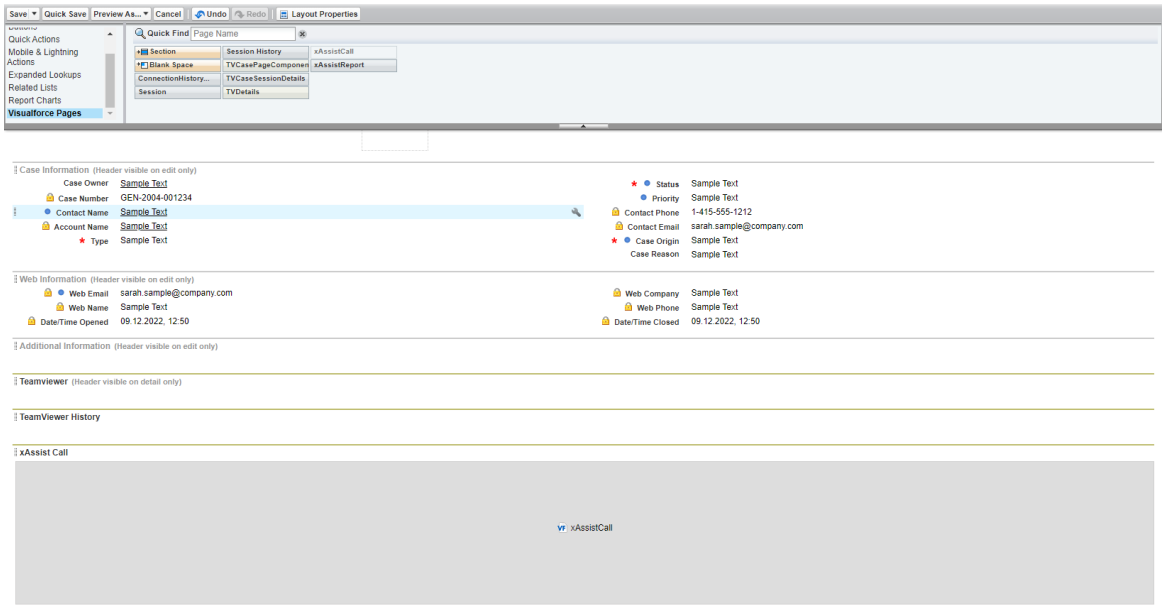


Figure 36

4) Drag and drop the section to the page layout.
5) Add a section name as “xAssist Report”.
6) Select Layout as 1-Column.
7) Add the Visualforce Page “**xAssist Report**” to the new.

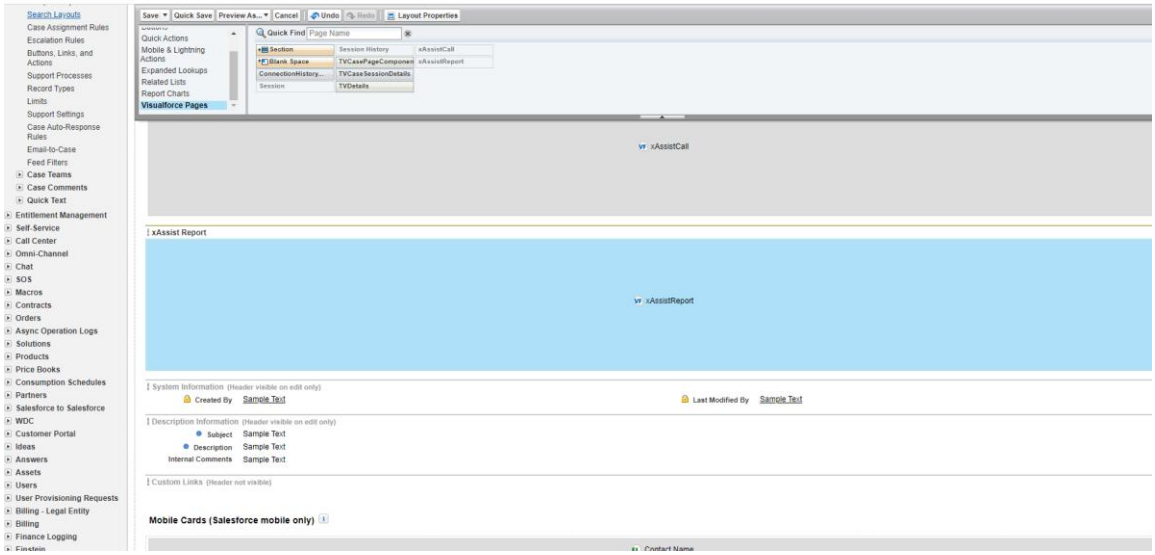


Figure 37

8) Click on **Save.**
9) Similar way we can configure page layout for account, contact, lead, opportunity, and custom object.

3.3.6 Add TeamViewer ID field in Assets page

1) In Classic mode, open an asset and click on the “Edit Layout” option.
2) Drag and drop “TeamViewer **ID**” field under Fields to the Asset Information section.

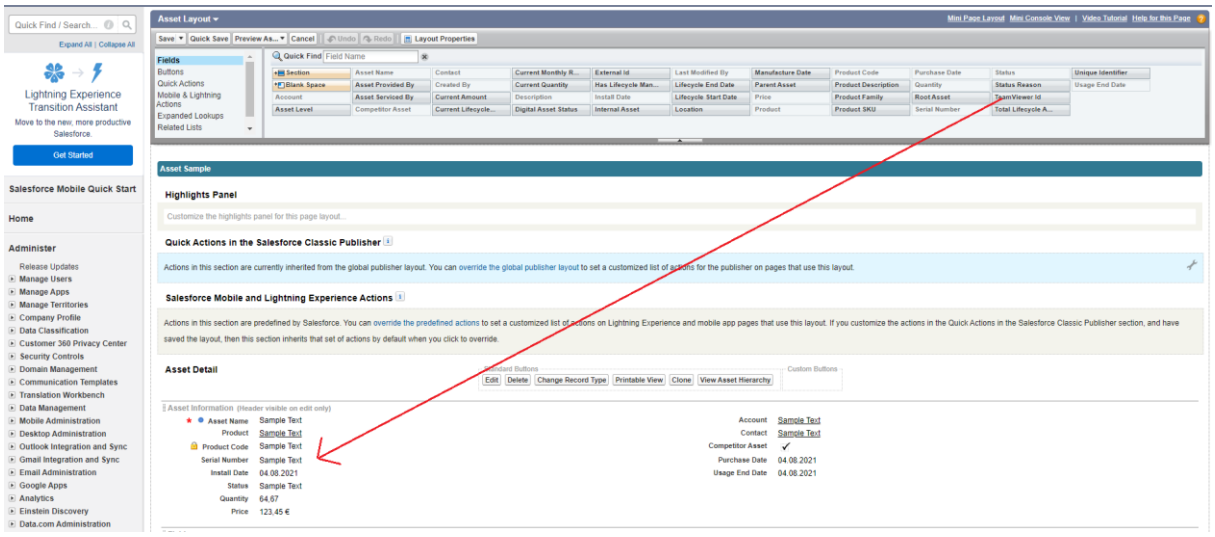


Figure 38

3) Click on “Save” button.

3.3.7 Add widget to connect to TeamViewer ID

1) Open any record detail page.
2) Click on the gear icon on top right of the page and select “Edit Page”.
3) Drag and drop “TeamViewer Connect To Partner Id” widget to the page.
4) Save.

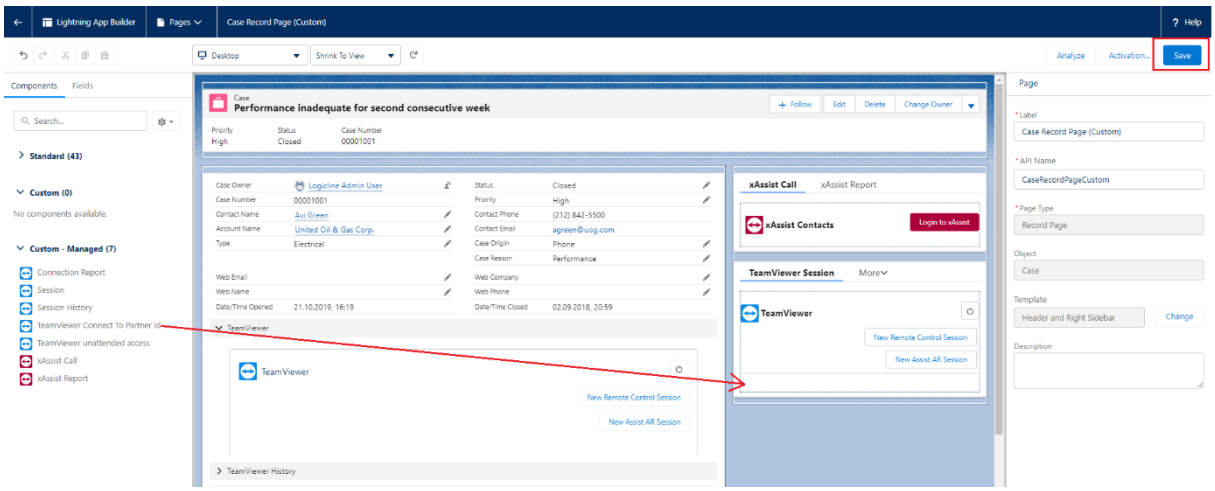


Figure 39

3.4 Configuring an email template

In order to make sharing the session URL easier (explained in more detail in chapter 4), you can configure an email template. This will enable you to send the URL to the submitter of a case with a one-click action.

Go to Setup → Communication Templates → Email Templates and select the folder “TeamViewer Templates”. Choose the template you want to edit or create a new

one. You **must** name the template in the description "**teamviewer_{Objectname}_template**" to make it visible on the share option. {Objectname} is the name of the object to which you want to send email.

Within the package there is already a default email template defined.

An example email template is shown below:

Dear {!TeamViewerCase__c.ParentRecordName__c},

A TeamViewer remote support session has been created to solve your case.

Please follow the link to join the remote support session:
{!TeamViewerCase__c.tvCustomerLink__c}

Best regards
{!User.Name}

4 Using TeamViewer for Salesforce

4.1 Setup

To set up the TeamViewer App a user with administrator rights must be logged in. Select “TeamViewer Administration” from the App Launcher. The TeamViewer Administration page provides the following options: Session Settings and Supported Objects.

4.1.1 Session settings

The Salesforce Administrator can allow/restrict functionality to create new sessions of type: Remote Control Session and Assist AR Session.

1) Check one or both checkboxes “Allow RC Session” “Allow Assist AR Session”.
2) Click on “Execute”.

Figure 40

4.1.2 Session Validity

The Salesforce Administrator can set validity of session. The default value will be 24 hours. The customer can set an integer value in hours.

1) Select time in hours in “Session Validity (Hours)” field.
2) Click on “Execute”.

Figure 41

4.1.3 Setup Asset field for TeamViewer Partner Id

The Salesforce Administrator can set asset field that need to be prefill in “TeamViewer connect to Partner Id” component.

1) TeamViewer Administration page is having a field with name “Asset field for TeamViewer Partner Id”.
2) It will list asset fields having datatypes Picklist, Text, Auto Number, Formula (Text, Number), Geolocation.
3) Select one of the asset field or “none” from the dropdown.
4) Click on “Execute”.
5) In TeamViewer Connect to Partner Id component, value of selected asset field will get populated.

Note: If “none” is selected then in Asset page, In TeamViewer Connect to Partner Id will be empty.

Figure 42

4.1.4 Setup Case field for TeamViewer Partner Id

The Salesforce Administrator can set Case field that need to be prefill in “TeamViewer connect to Partner Id” component.

1) TeamViewer Administration page is having a field with name “Case field for TeamViewer Partner Id”.
2) It will list Case fields having datatypes Picklist, Text, Auto Number, Formula (Text, Number), Geolocation.

3) Select one of the case field or “none” from the dropdown.
4) Click on “Execute”.
5) In TeamViewer Connect to Partner Id component of case record page, value of selected case field will get populated.

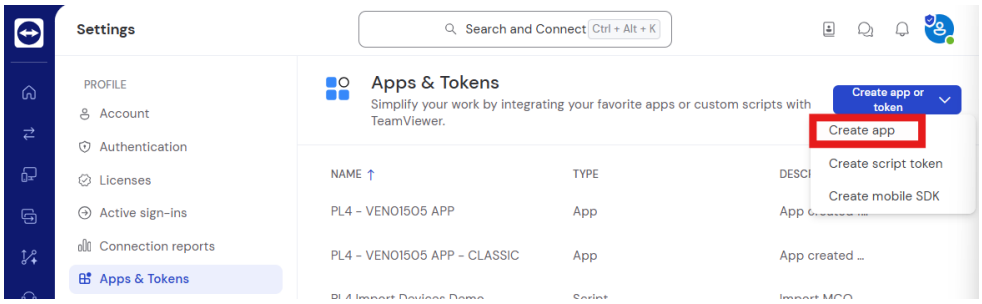
Note: If “none” is selected then in Case page, In TeamViewer Connect to Partner Id will be empty.

Figure 43

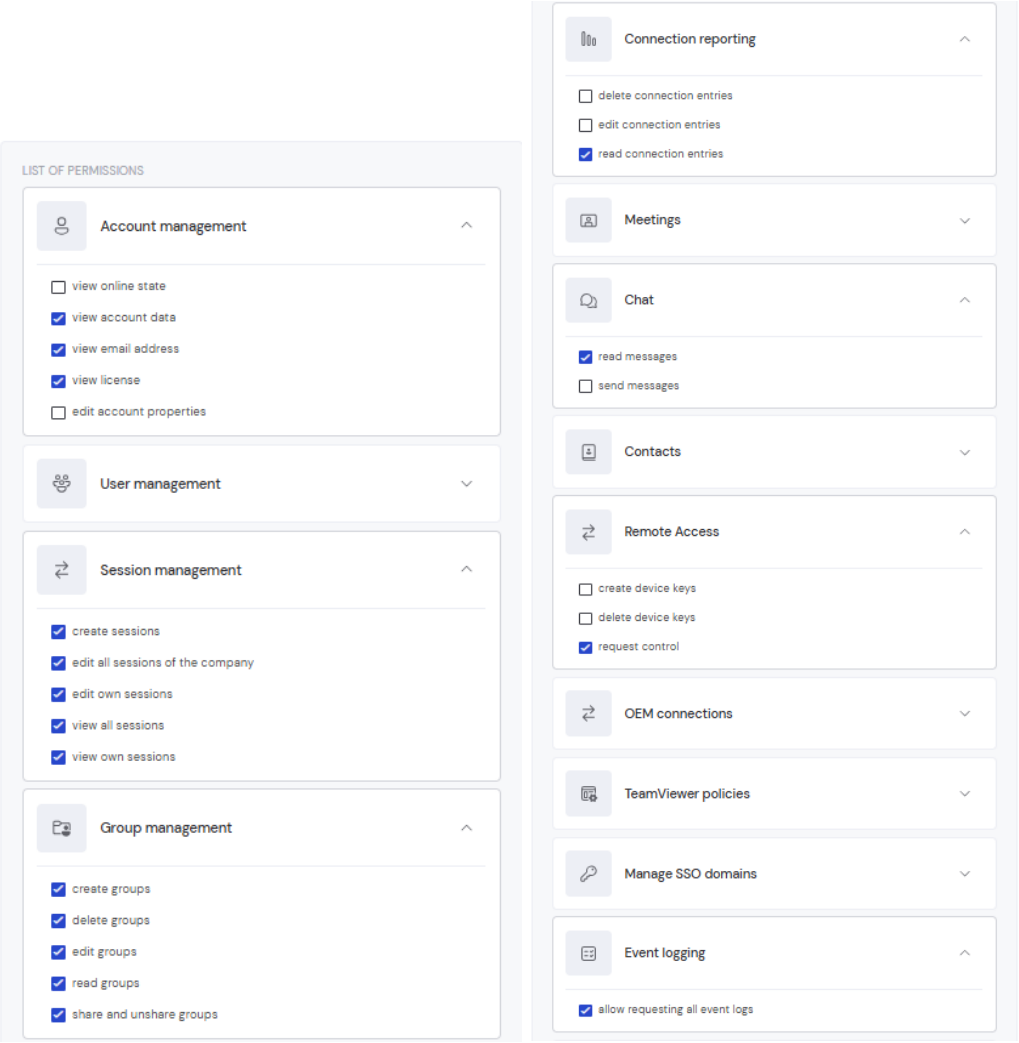
4.1.5 TeamViewer Oauth Credentials

The Salesforce Administrator can create a custom client id and secret in the TeamViewer management console.

1) Login at account.teamviewer.com to create an app:

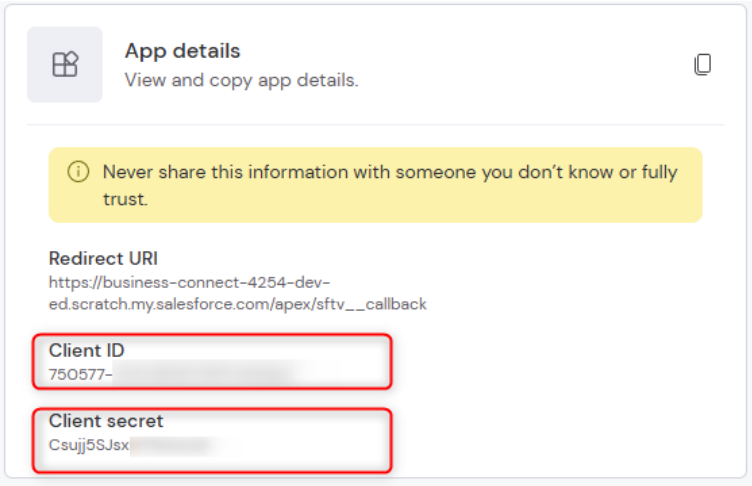


2) Create the app with the following permissions:



3) Copy the redirect uri provided in Salesforce on TeamViewer Administration page to the TeamViewer

4) In Salesforce on the TeamViewer Administration page fill the “Client ID” and “Client Secret” from the app details provided in TeamViewer



5) Click on “Execute” button.

Figure 44

4.1.6 Supported objects

By default, the app support 6 objects – account, contact, lead, case, assets, and opportunities. Admin is able to add support for additional objects via this section.

1) Click on “Supported Objects”.

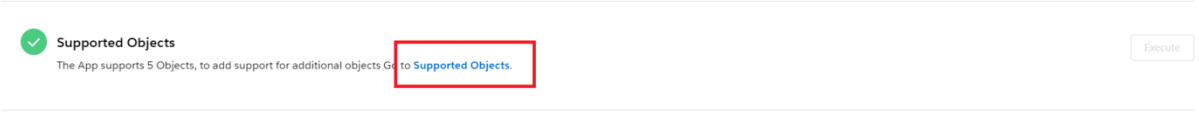


Figure 45

2) This will load the Custom Metadata Types page with existing supported objects.
3) Click on “New” button.

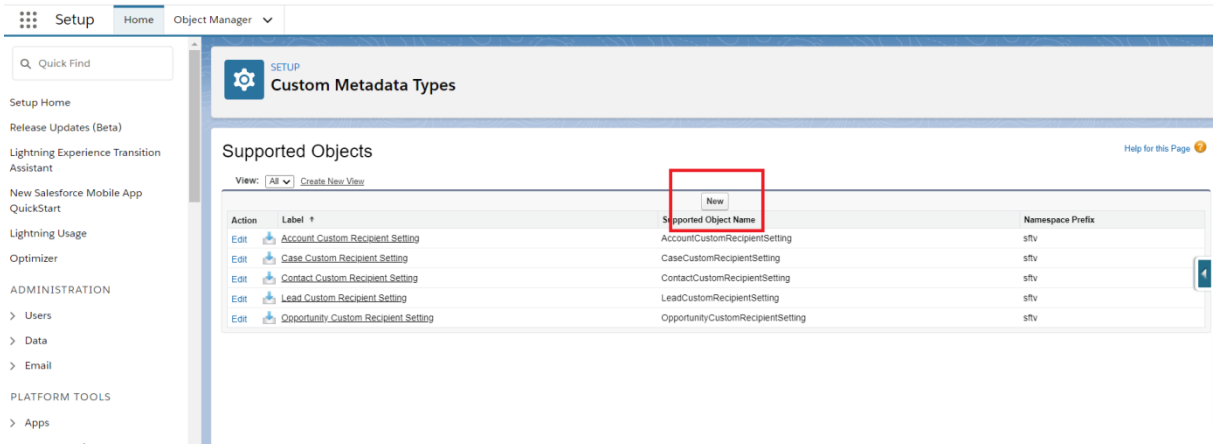


Figure 46

4) Fill “Label”, “Email Template Description”, “supported Object” and “Name Field”.
5) Click “Save”.

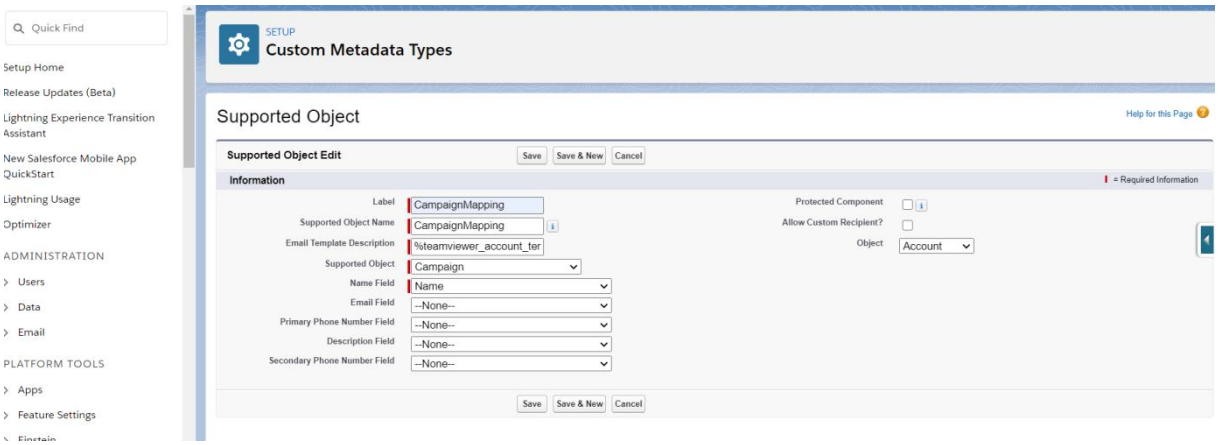


Figure 47

4.1.7 Setup custom recipient field

If you want the “Custom Recipient E-Mail” field needs to be editable, you need to setup it in supported object.

1) Click on “Supported Objects” from Administration page.
2) Click on “Edit” option of the corresponding object.

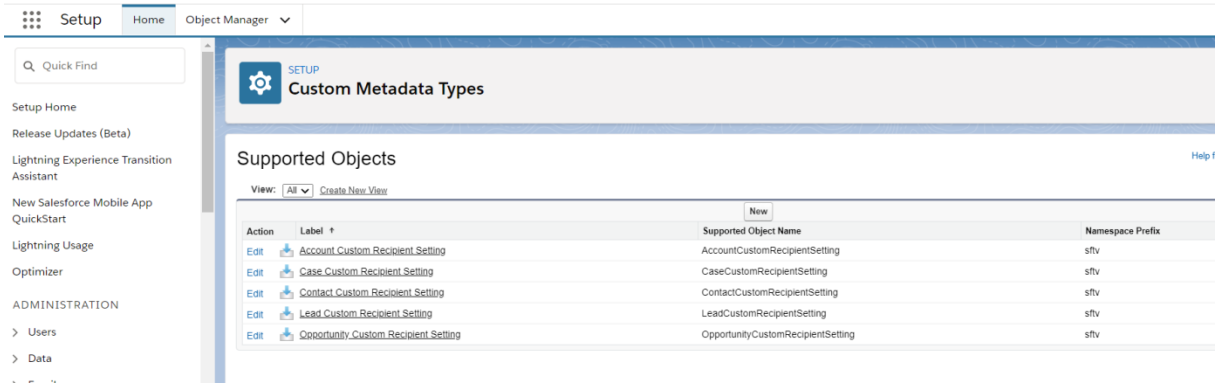


Figure 48

3) Select the “Allow Custom Recipient?” checkbox.
4) Click on “Save”.

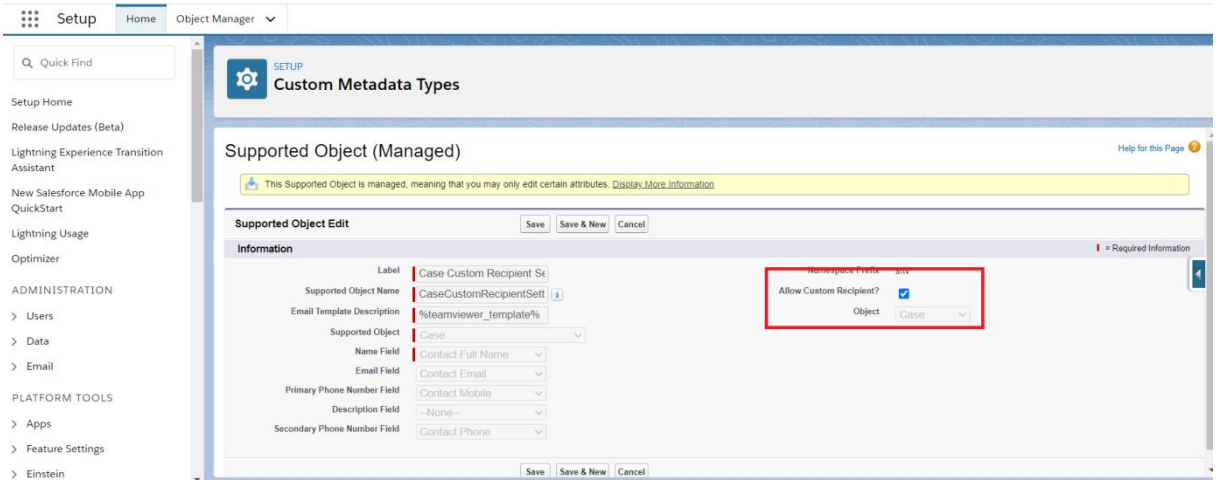


Figure 49

4.1.8 Setup API to import TeamViewer Device Ids

On TeamViewer Administration page, admin can set up import for legacy or managed TeamViewer devices. In Salesforce if we have an asset having same name as in TeamViewer Console we can map between those devices.

1) Select the dropdown near “API to import TeamViewer Devices Ids.

Figure 50

2) Click on “Execute” button.
3) Click on “Execute” button under the section "Schedule Asset TeamViewer Ids Update"
4) The TeamViewer ID of the asset will get prefilled with the corresponding ID in TeamViewer Console.

4.1.9 Setup script token

On TeamViewer Administration page admin is able to set a script token to perform global actions that interact with the TeamViewer backend.

Creating admin token

This token is created in the TeamViewer MCO.

Note: It is assumed that the administrator has created a company profile on TeamViewer. For more information on how to setup a company profile and add users

visit https://community.teamviewer.com/t5/Knowledge-Base/How-to-add-Users-to-a-Company-Profile/ta-p/3573 .

1) Go to https://login.teamviewer.com
2) Go to “Profile” on top right corner and select Administer <your_company_profile>

Note: You will need to have a **Corporate or higher** TeamViewer license to be able to use this functionality.

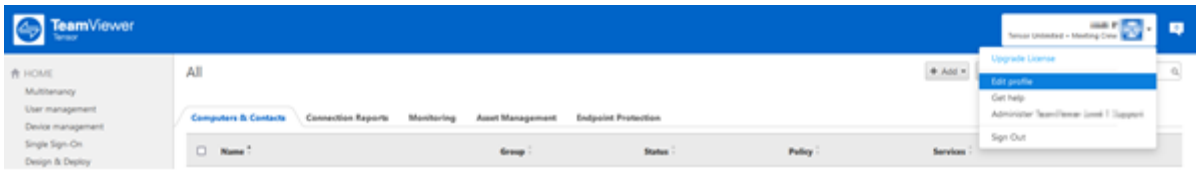


Figure 51

3) Go to “Apps” and select “Create Script Token” button.

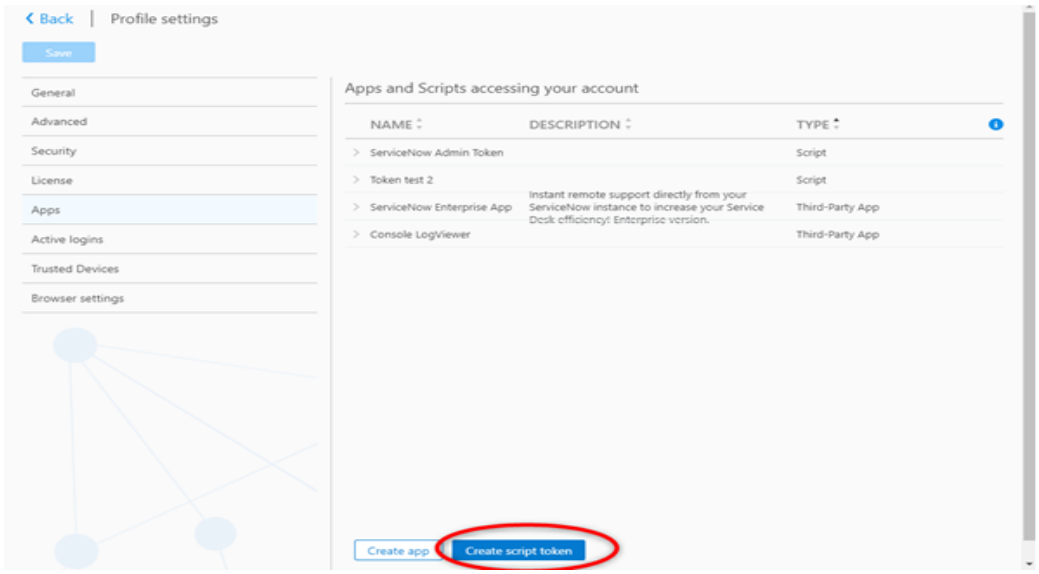


Figure 52

4) Setup permission as below

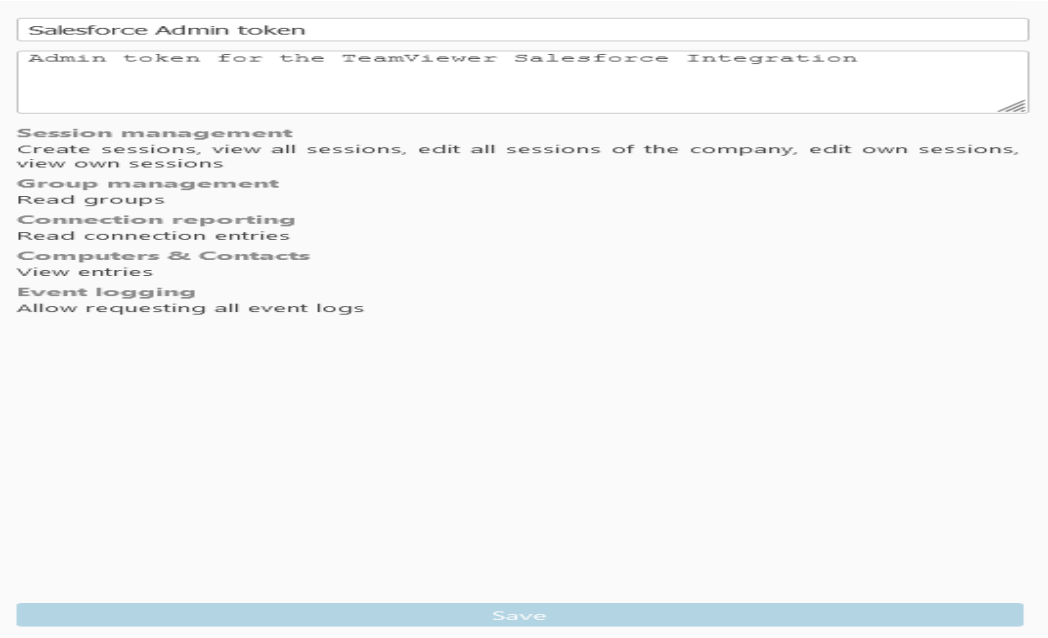


Figure 53

5) Click “Save” to generate the Script Token.

Setup script token in Salesforce

1) Copy the generated token in the step above and paste in the respective field on the TeamViewer Administration page.

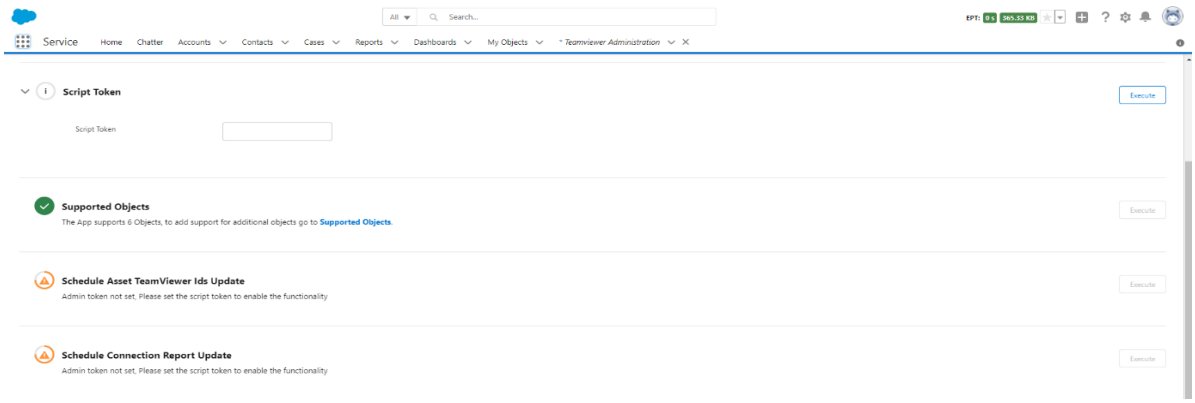


Figure 54

Fill the token and click on “Execute” button. If the token is valid, it will be used for all administrative tasks, especially for to obtain connection reports and match assets.

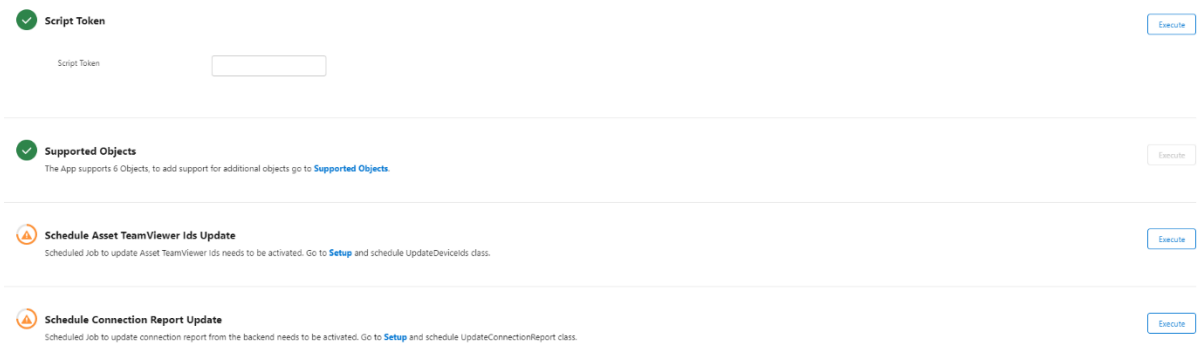


Figure 55

4.2 Sign in and Sign out

Once you have installed and customize the page layout with TeamViewer components, on loading the page for first time, you will be prompted to sign in your TeamViewer account.

Figure 56

1) Click on “Login to your TeamViewer account”.

Note: If you do not have a TeamViewer account yet a TeamViewer account can be created directly on the sign in screen, at https://login.teamviewer.com or through the native TeamViewer client.

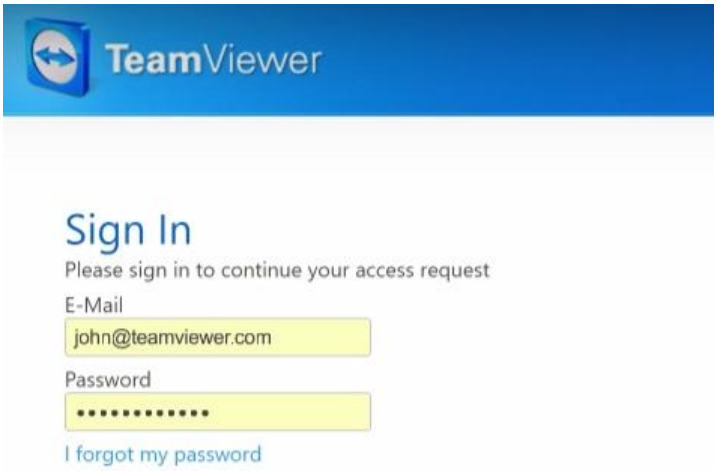


Figure 57

2) You will then need to approve the permissions for the Salesforce application to access your TeamViewer account.

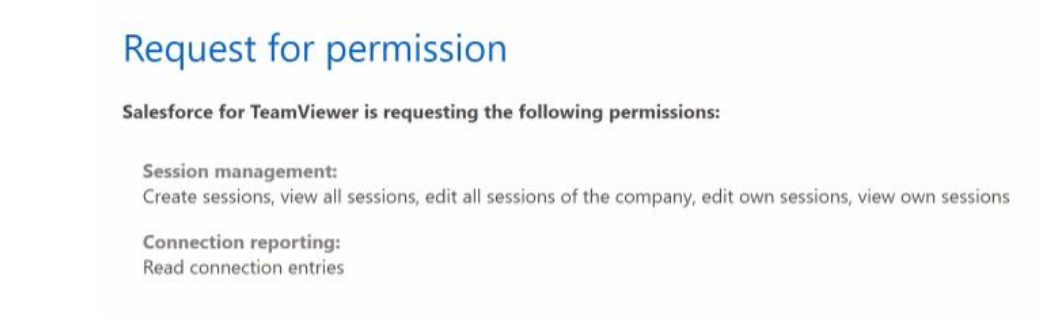


Figure 58

3) Once you successfully logged in to TeamViewer account, the TeamViewer session component will contain a logout button with username from the API. It also has buttons to start Remote Control session and Assist AR session.

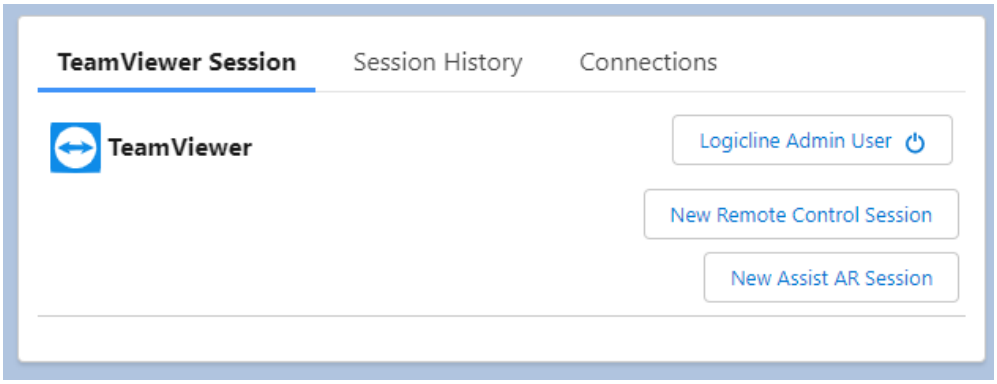


Figure 59

4) Click on the logout button, the session widget should be replaced with “Login to your TeamViewer account” button.

Figure 60

4.3 Remote control session

Once you have logged in with your TeamViewer account, you will be able to create sessions and initiate remote connections. Based on your “Session Settings” in TeamViewer the Administration page, “Remote Control Session” and “Assist AR Session” will be available.

4.3.1 Create remote control session

1) Click on “New Remote Control Session” button.

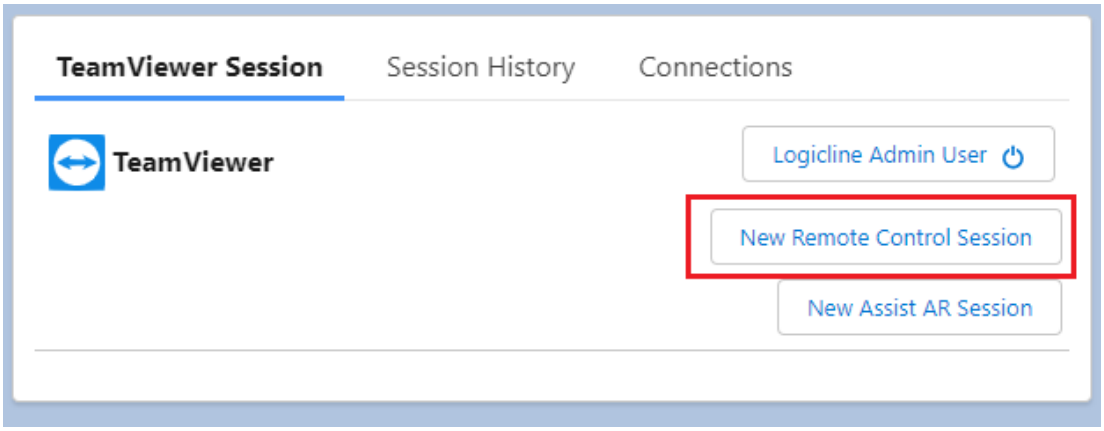


Figure 61

2) New remote control session will be created as you see in the following figure.

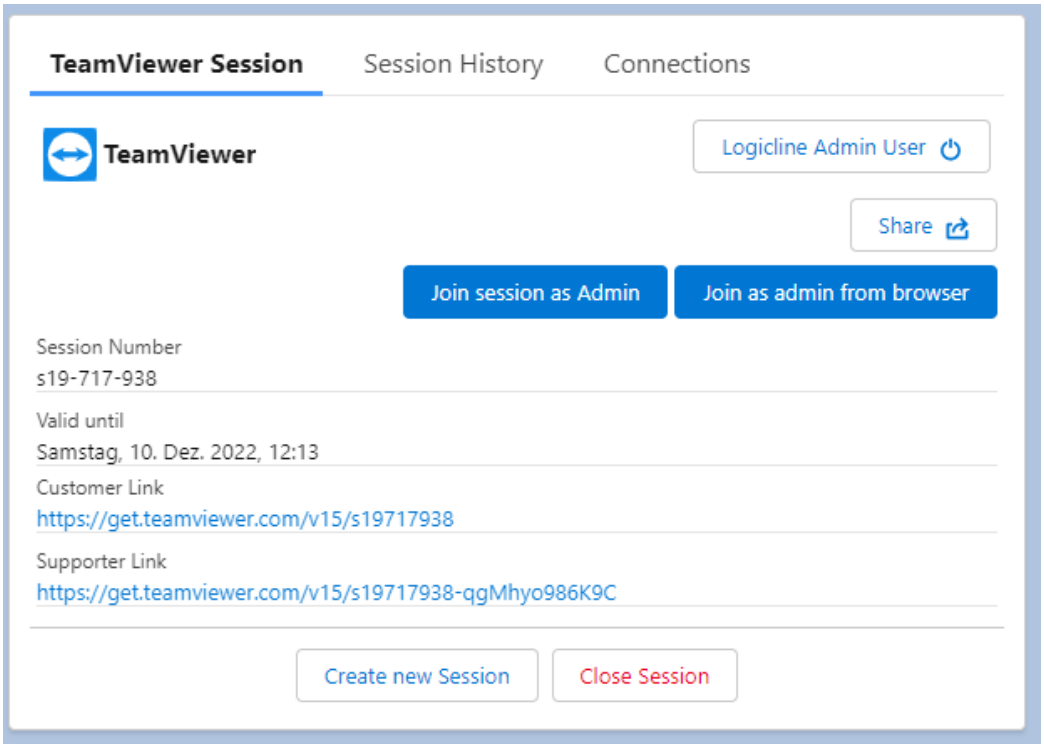


Figure 62

4.3.2 Share remote control session

1) Click on “Share” button.
2) If “Allow Custom Recipient?” check box is not checked for the object, a popup will be displayed as in following figure. The “Recipient E-Mail” field will be non-editable.

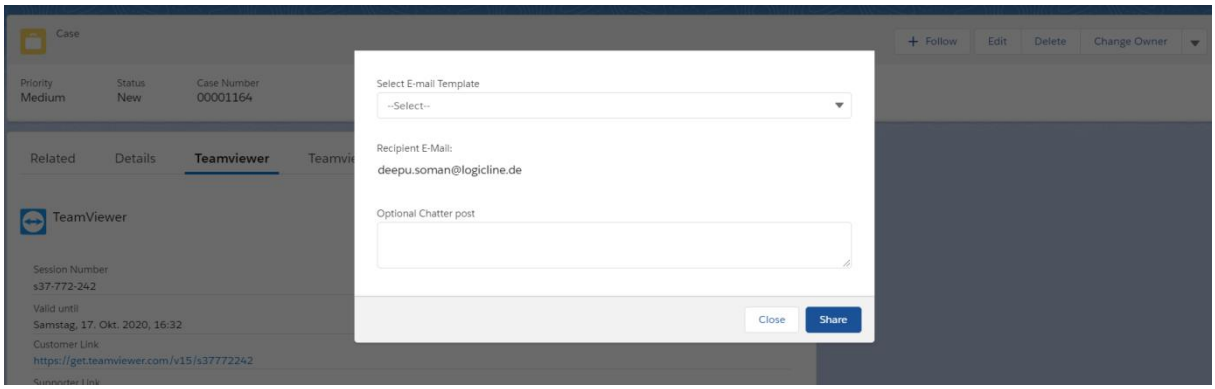


Figure 63

3) If “Allow Custom Recipient?” check box is checked for the object, a popup will be displayed as in following figure. The “Recipient E-Mail” field will be editable.

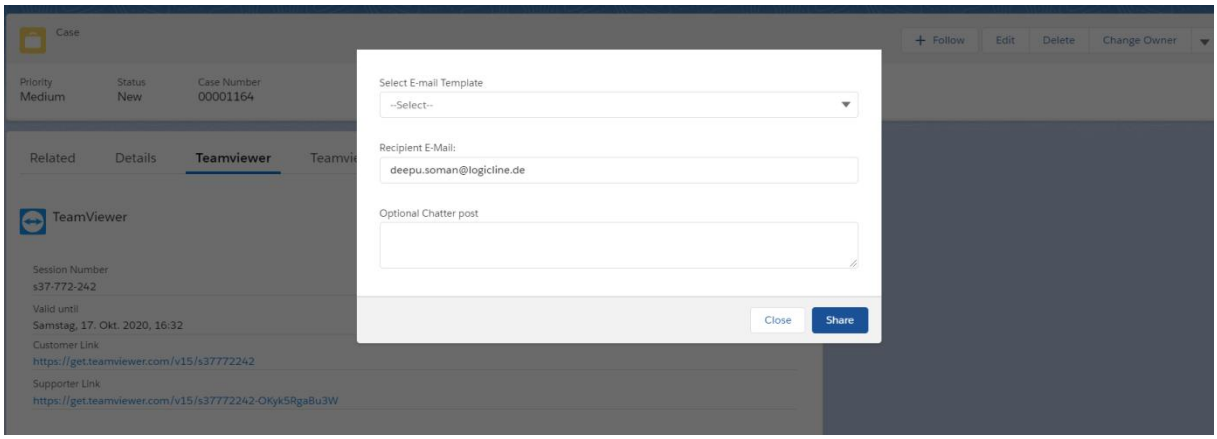


Figure 64

4) The “Recipient E-Mail” filed will be auto populated with the email address value of the related object.
5) If an object has multiple related objects (e.g., account having multiple contacts), the popup will be displayed as in following figure.

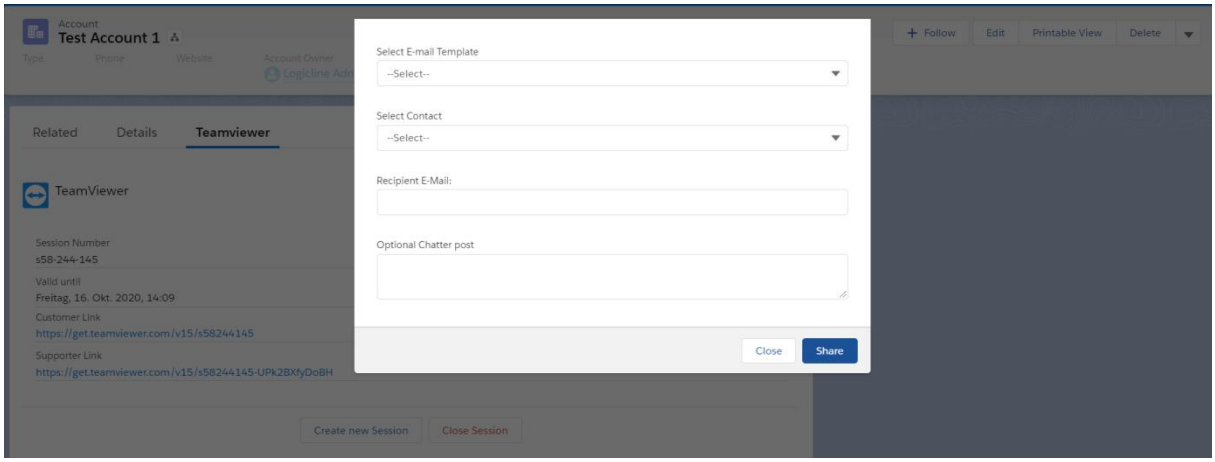


Figure 65

6) In this case selecting a contact from “Select Contact” drop down will auto populate the email.
7) Select an email template in “Select E-Mail Template” drop down.
8) Click on “Share” button. You can also enter text in the Optional Chatter post which will appear in the Chatter stream.
9) The recipient email will receive customer link.

4.3.3 Starting remote control session

Note: Please note that to do a remote control session you will need to have the TeamViewer application installed on your computer. Please download TeamViewer from http://www.teamviewer.com/download before you start using the TeamViewer for Salesforce application.

1) Click on “Join session as Admin” button.

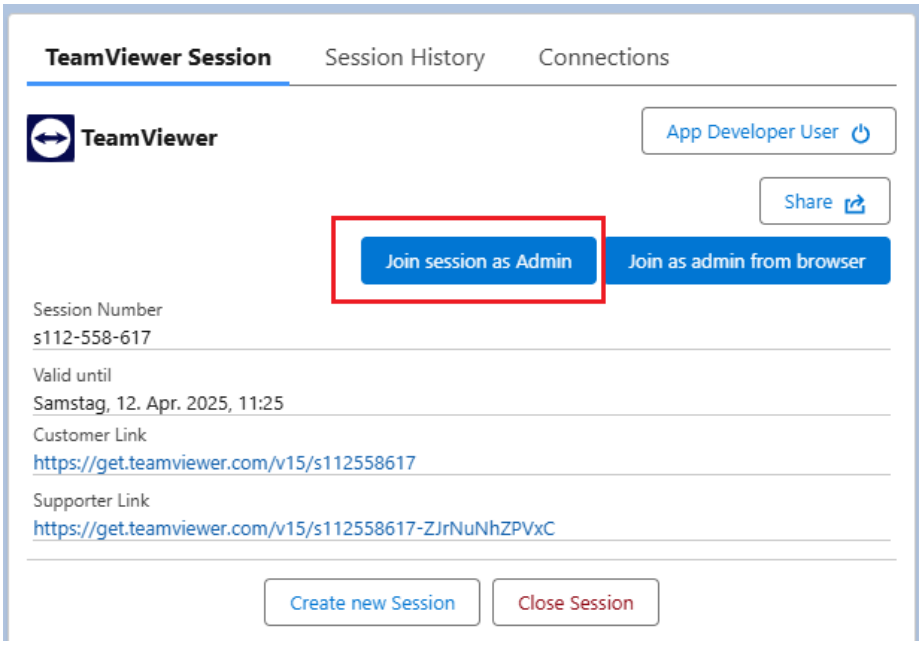


Figure 66

2) Once you have selected the Supporter Link (assuming you have already installed the native TeamViewer app), you will see a pop up asking you for permission to launch an application. On Chrome the pop up will be as the Figure below.

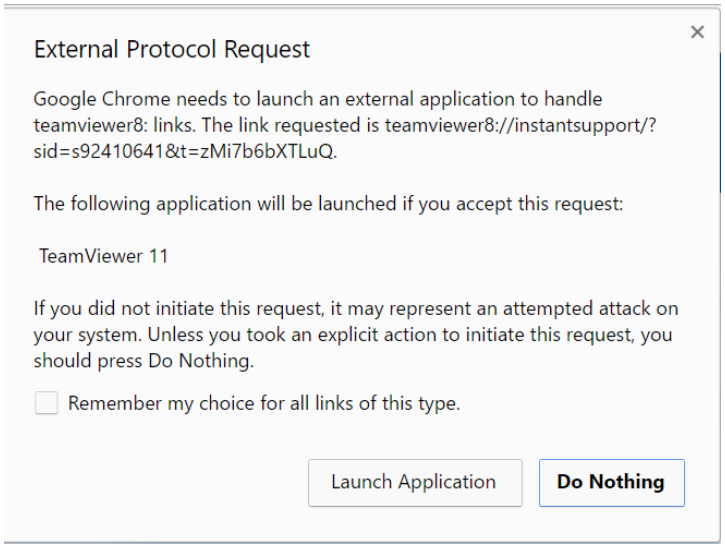


Figure 67

3) Click Launch Application. The supporter will then be connected to the TeamViewer remote control session and the image below will appear.

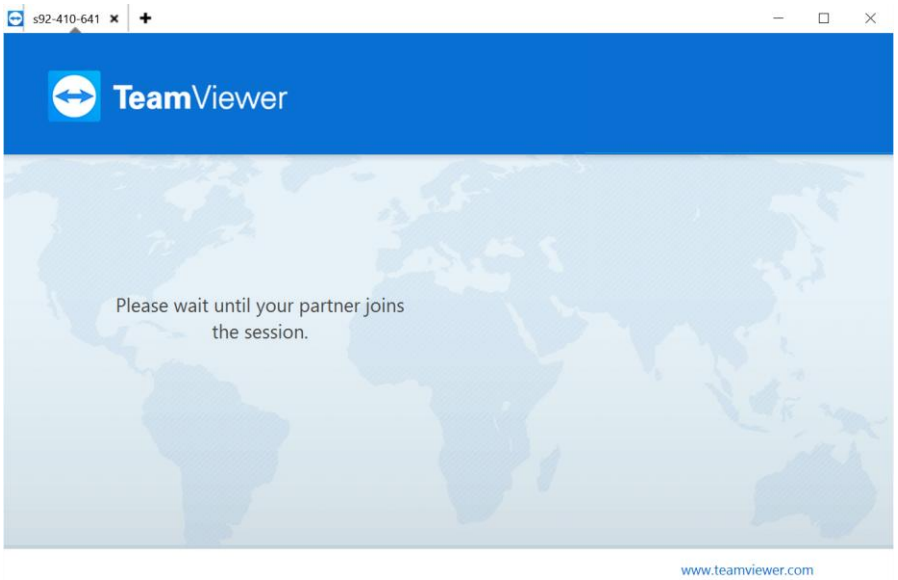


Figure 68

4) On the end user side, once he selects the URL, he/she will be prompted to download the TeamViewer Quick Support module as shown in the Figure below (for the case of connecting to a Windows PC).

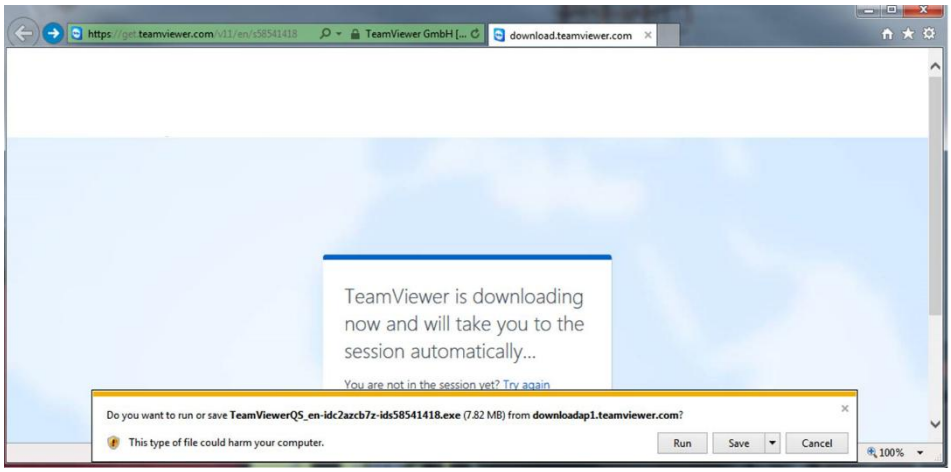


Figure 69

5) Once the Quick support module is downloaded and launched a pop up asking the user to Allow the connection is shown and the connection is established.

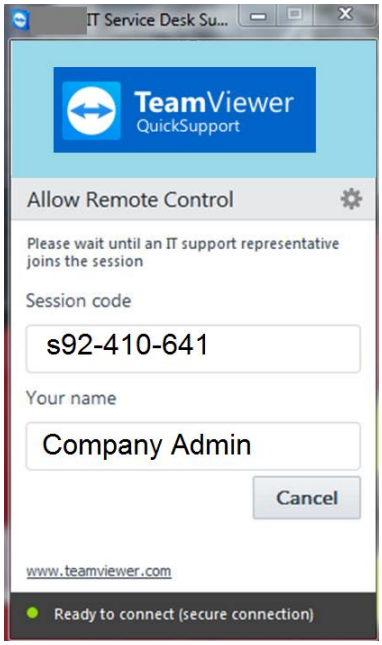


Figure 70

4.3.4 Closing remote control session

Once the remote control session complete, the supporter needs to close the session.

1) Click on the “Close Session” button.

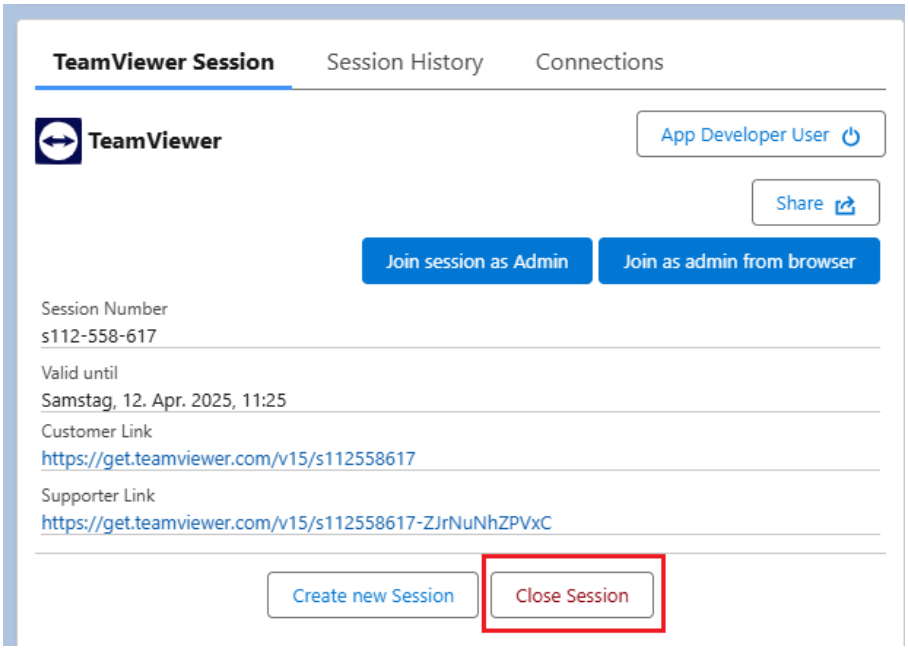


Figure 71

2) After closing the remote control session, it will be look like as in following figure.

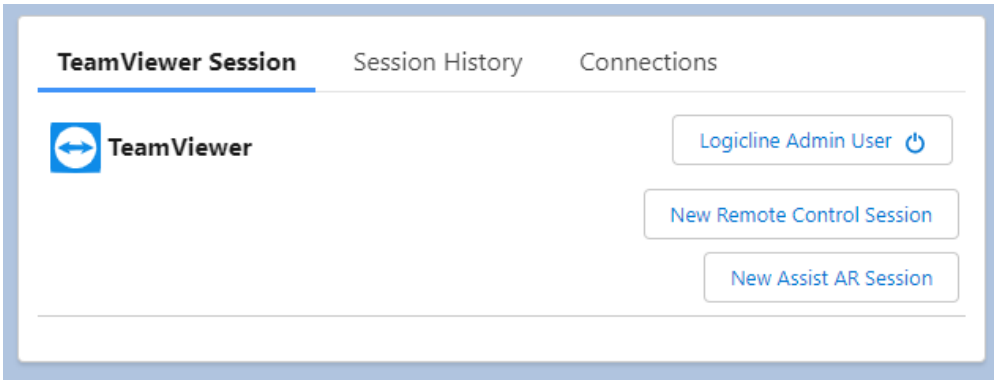


Figure 72

4.4 Assist AR Session

If the “Assist AR Session” option is selected in TeamViewer Administration page, the “New Assist AR Session” button will be available in the TeamViewer section.

4.4.1 Create Assist AR session

Click on “New Assist AR Session”. Assist AR session will be created as you see in the following figure.

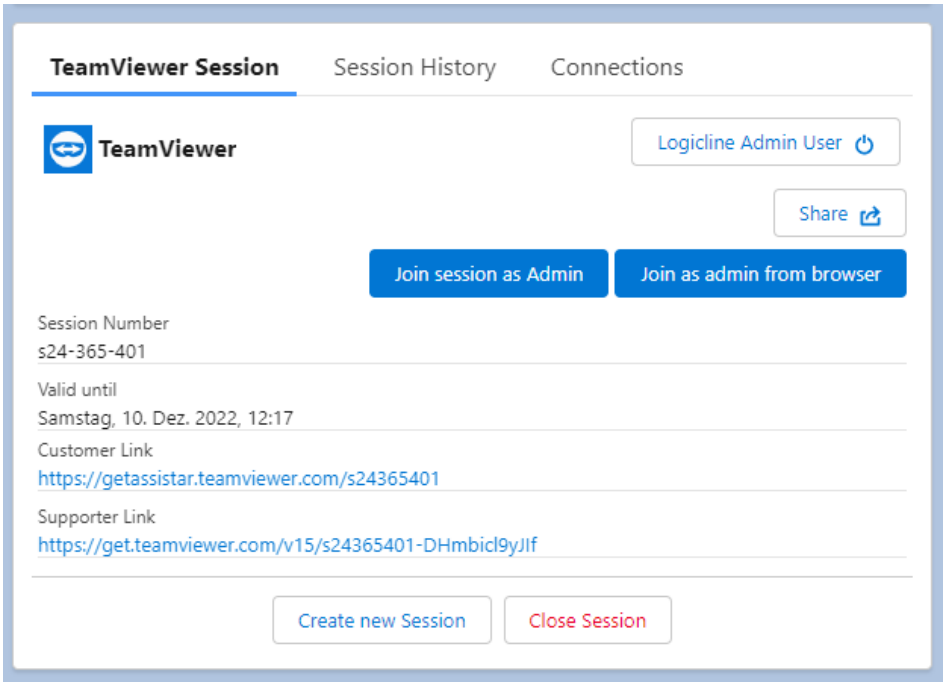


Figure 73

4.4.2 Share Assist AR session via SMS

1) Click on “Share” button. A popup will be displayed as in following figure.

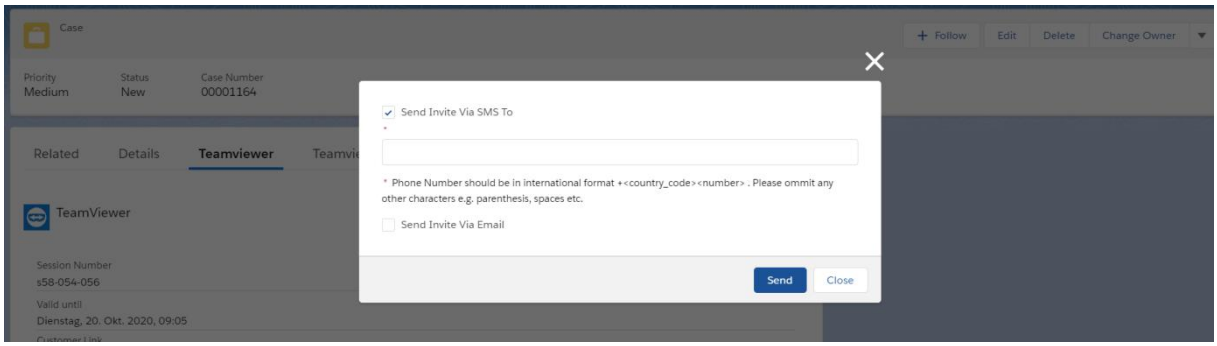


Figure 74

2) “Send Invite Via SMS To” option is checked by default. If a phone number is provided in the related object (normally the contact) the field will be prepopulated with it. If mobile and phone number values are provided in the contact, the text field is get auto filled with the mobile value.
3) If no phone number is available, the field is left blank and the number the TeamViewer Assist AR session will be shared with as to be entered manually.

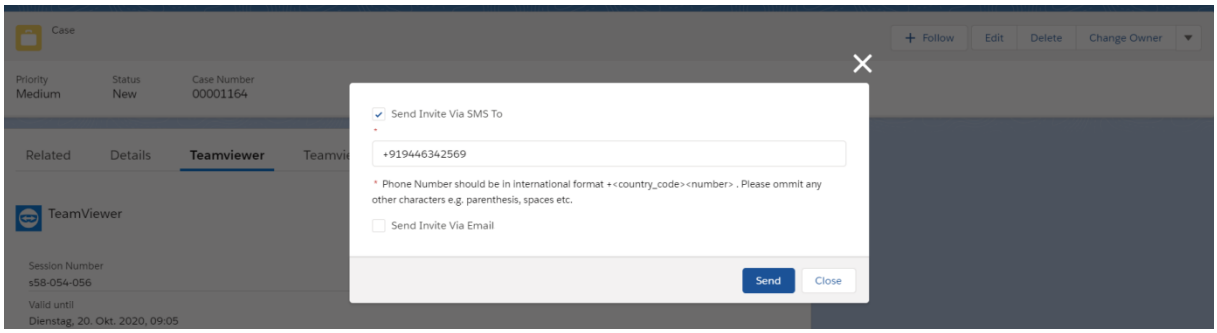


Figure 75

4) If an object has multiple related objects (e.g., account having multiple contacts), the popup will be displayed as in the following figure.

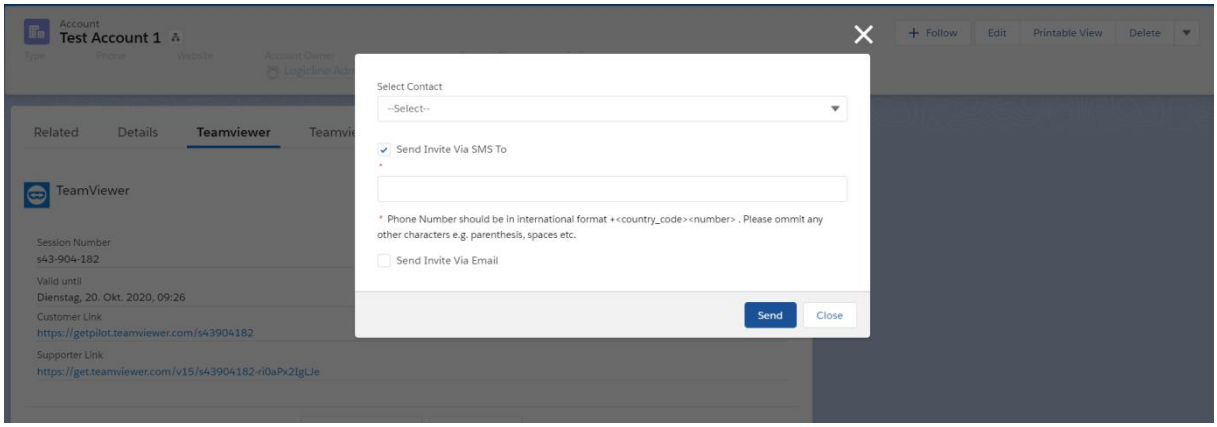


Figure 76

5) In this case selecting a contact from “Select Contact” drop down will get auto populate by the mobile number/phone number.
6) Click the “Send” button.
7) The recipient will receive the customer link to join the remoter support session on his phone.

4.4.3 Share Assist AR session via email

Assist AR session supports one more option for sharing and that is via email.

1) Select “Send Invite Via Email”

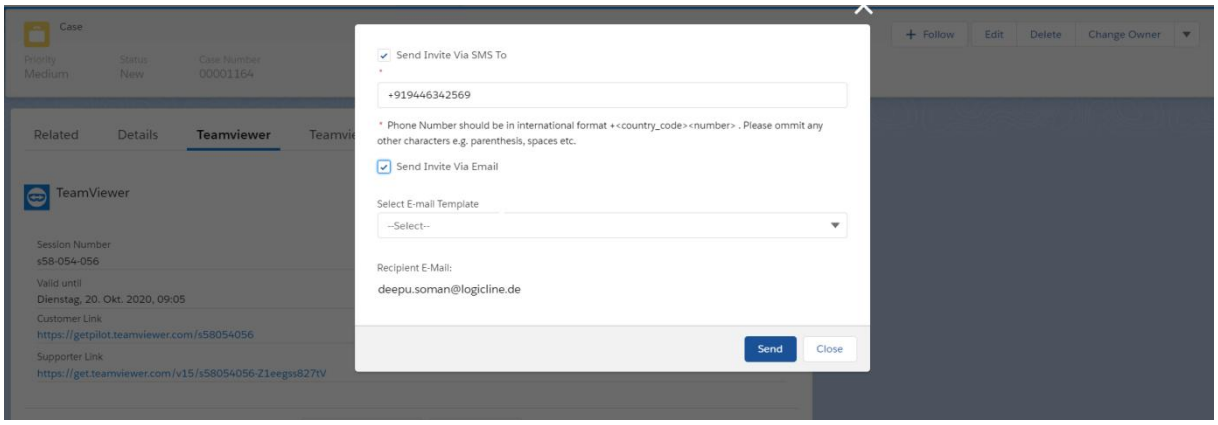


Figure 77

2) The “Recipient E-Mail” filed will be auto populated with the email address value of the related object.
    a. If “Allow Custom Recipient?” check box is not checked for the object in Custom Metadata Types, the “Recipient E-Mail” field will be non-editable.
    b. If “Allow Custom Recipient?” check box is checked for the object, a popup will be displayed as in following figure. The “Recipient E-Mail” field will be editable, and the session will be sent to the e-mail address entered.

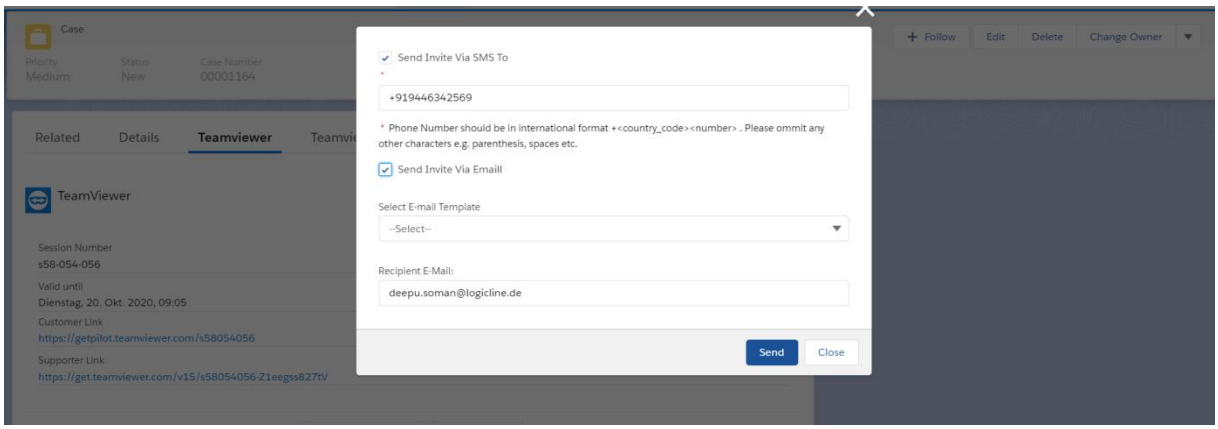


Figure 78

    c. If an object has multiple related objects (e.g., account having multiple contacts), the popup will be displayed as in following figure.

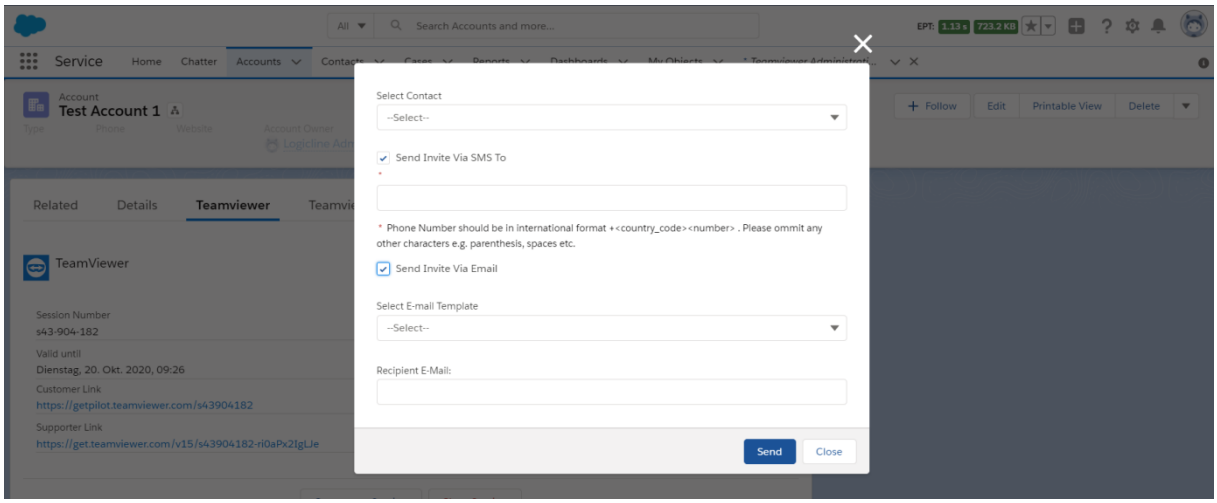


Figure 79

3) In this case selecting a contact from “Select Contact” drop down will auto populate the email.
4) Click on the “Share” button.
5) This will send the Assist AR session to recipient via both SMS and Email.
6) If you want to send the session only via email, uncheck the “Send Invite Via SMS To” check box.

4.4.4 Starting the Assist AR session

1) Click on the supporter link or “Join session as Admin” button to start the Assist AR session.
2) From customer side, click on the session link received via either email or SMS.

4.4.5 Closing a Assist AR session

Once the Assist AR session complete, the supporter needs to close the session.

1) Click on the “Close Session” button.

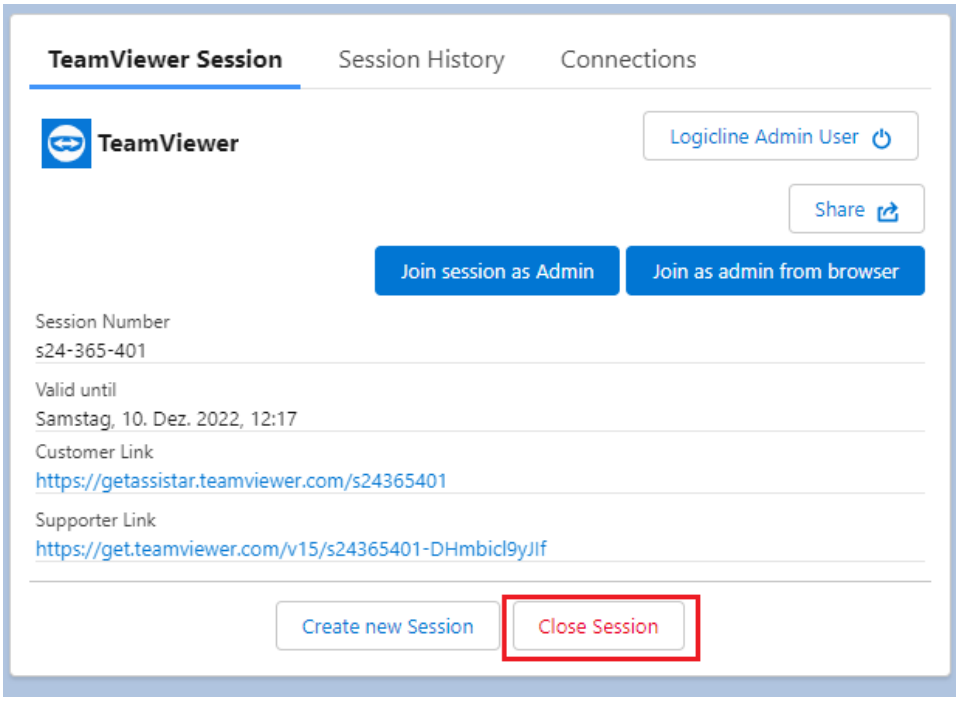


Figure 80

2) After closing the pilot session, it will be look like as in following figure.

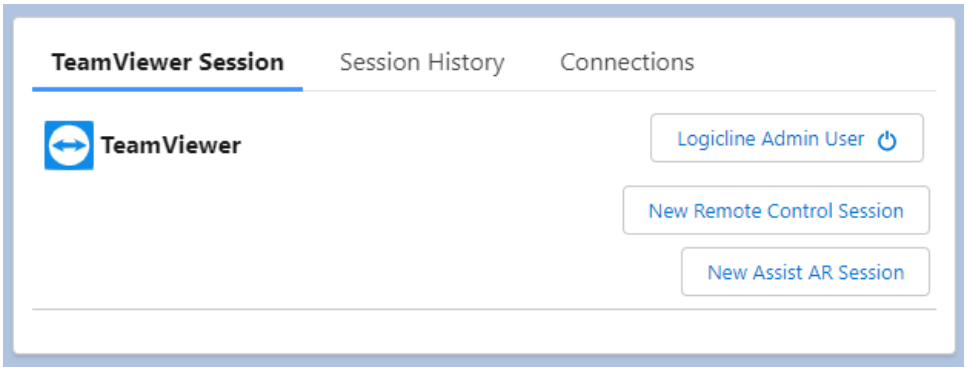


Figure 81

4.5 Create New Session

User is able to create new session either from Remote control session or from Assist AR session.

4.5.1 Create a new session with remote control session enabled

In Administration page, only Remote control session is enabled and on creating new session from an existing remote control session is always creating a new remote control session.

1) Click on “Create new Session” button.

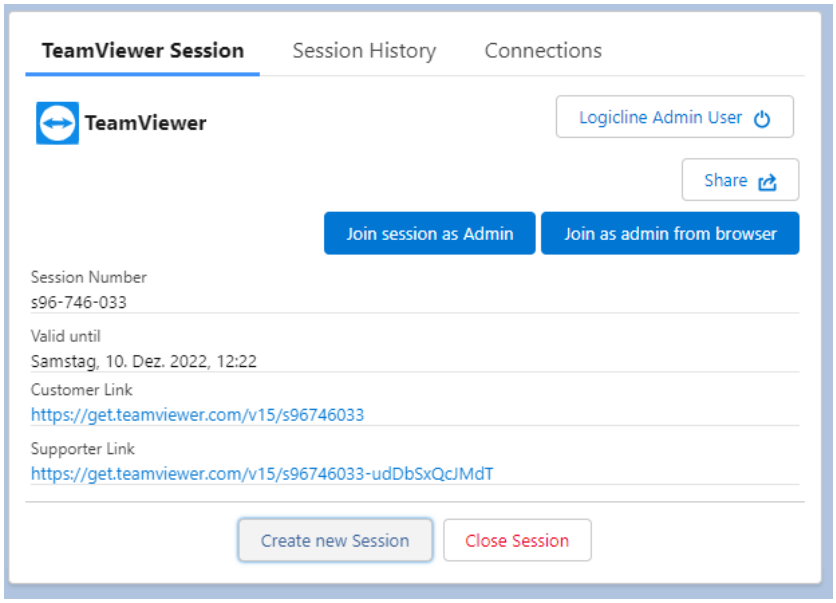


Figure 82

2) This will create a new remote control session with new customer and supporter links.

4.5.2 Create a new session with Assist AR session enabled

In Administration page, only Assist AR session is enabled and on creating new session from an existing pilot session is always create a new Assist AR session.

1) Click on “Create new Session” button.

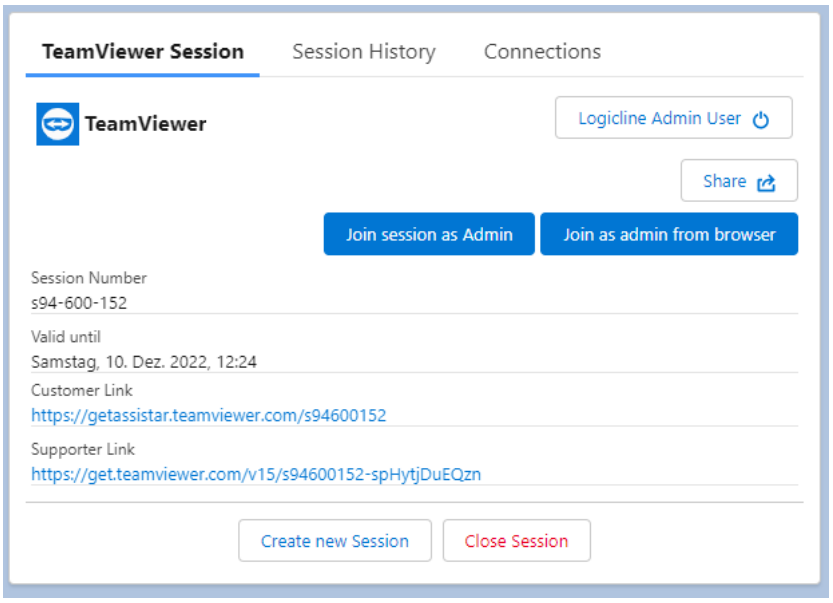


Figure 83

This will create a new Assist AR session with new customer and supporter links.

4.5.3 Create a new session with both remote control and Assist AR sessions enabled

If both remote control and Assist AR sessions are enabled in administration page, the new session will allow the user to opt for either remote control or Assist AR sessions. This feature is available in both remote control and Assist AR sessions.

1) Click on “Create new Session” button.
2) Click on “New Assist AR Session” will create a new Assist AR session.
3) Click on “Remote Control Session” will start a new remote control session.

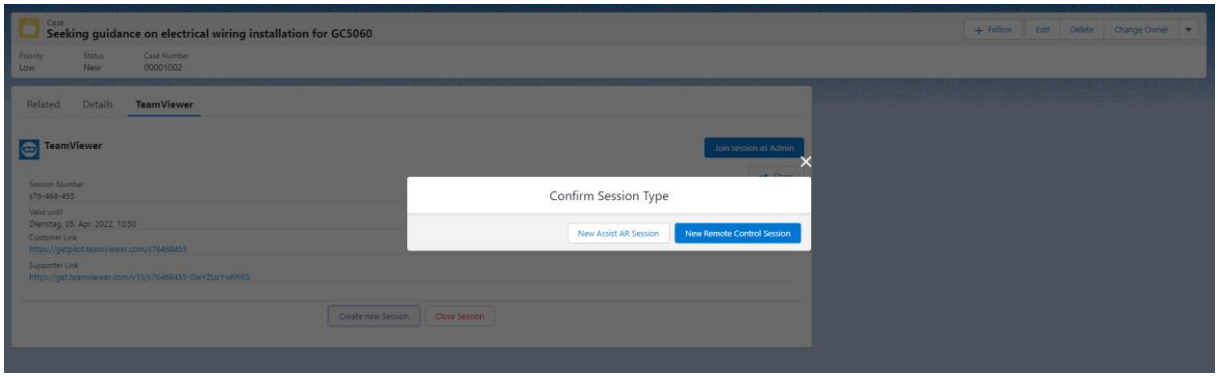


Figure 84

4.6 TeamViewer History

The history of all the sessions created for the selected record will be available under History tab.

1) Click on “TeamViewer History” tab.

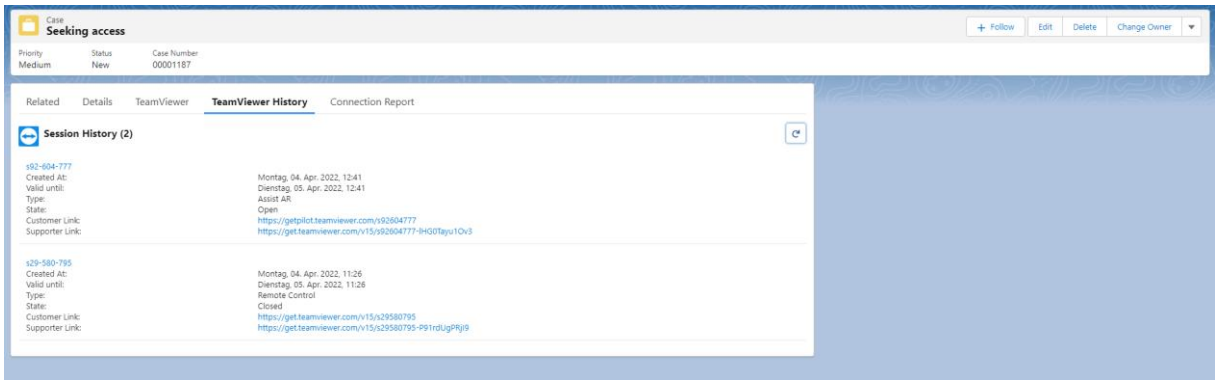


Figure 85

2) The History tab lists all the sessions with its details like
   a. Session id
   b. Valid until
   c. Type
   d. State
   e. Online
   f. Customer link
   g. Supported link
3) Click on the session id will open a popup with selected session’s details.

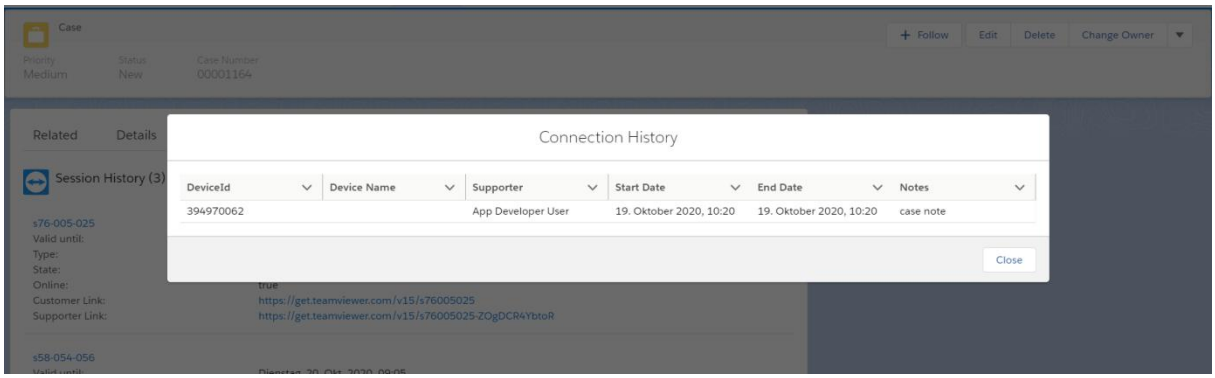


Figure 86

4.7 Connection Report

All sessions for a record and its details can be viewed from “Connection Report” tab.

1) Click on “Connection Report” tab.
2) The Start date will be selected based on the record creation date.
3) By default, it list already fetched connections. To get the latest connection use “Refresh” icon.
4) You will be able to sort the list based on the date.

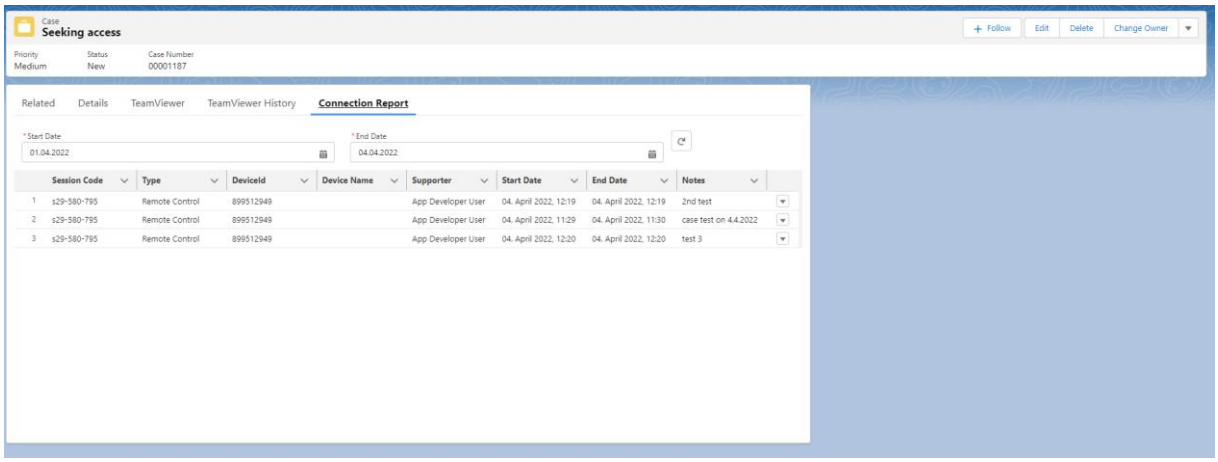


Figure 87

5) If you select the Mobile view during the page layout configuration, it will be as follows.

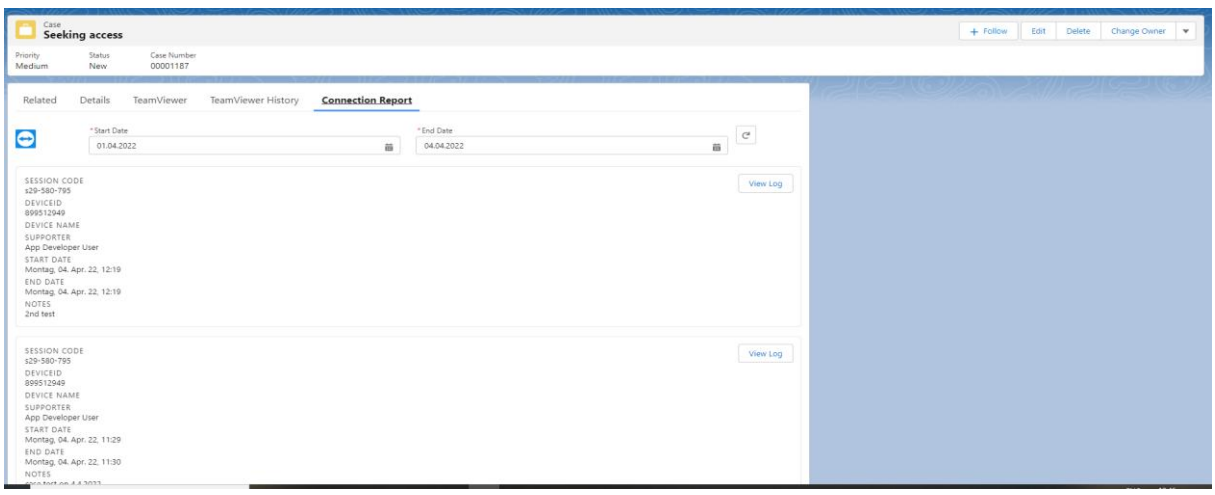


Figure 88

4.7.1 Connection report for Assets (Unattended connections)

A widget is introduced with the name “TeamViewer unattended connections” to show all connections that were made to the asset placed in this parent object. The connection will be shown only on request.

1) Click on the refresh icon.

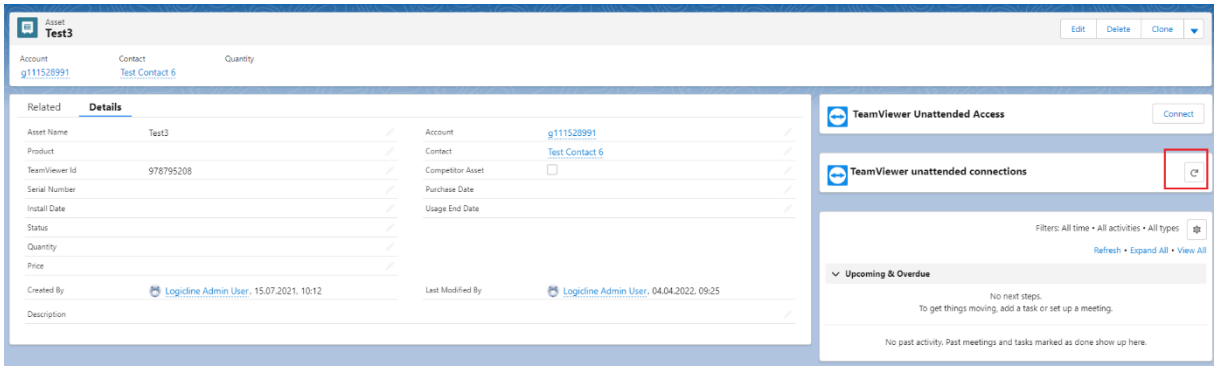


Figure 89

2) The connection report for the selected device will be displayed based on the configured desktop view or mobile view.

4.8 Companywide Connection Report

The companywide connection report shows all TeamViewer connections that were held in a selected time frame. The companywide connection report is available for users with administrator privileges.

1) Select “TeamViewer Connection Report” from the App Launcher.

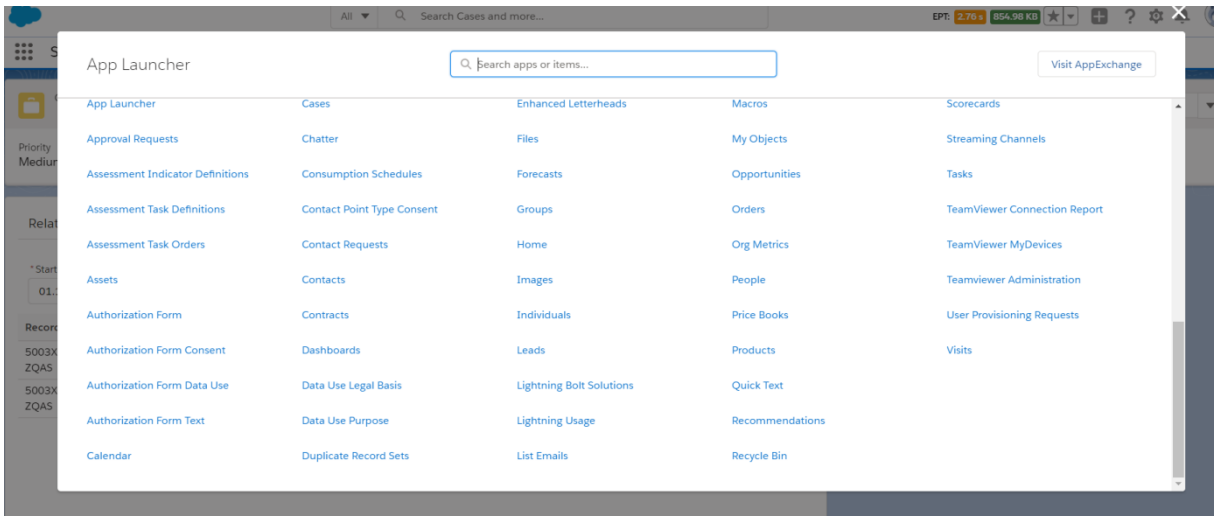


Figure 90

2) You will be able to filter the report based on the date.

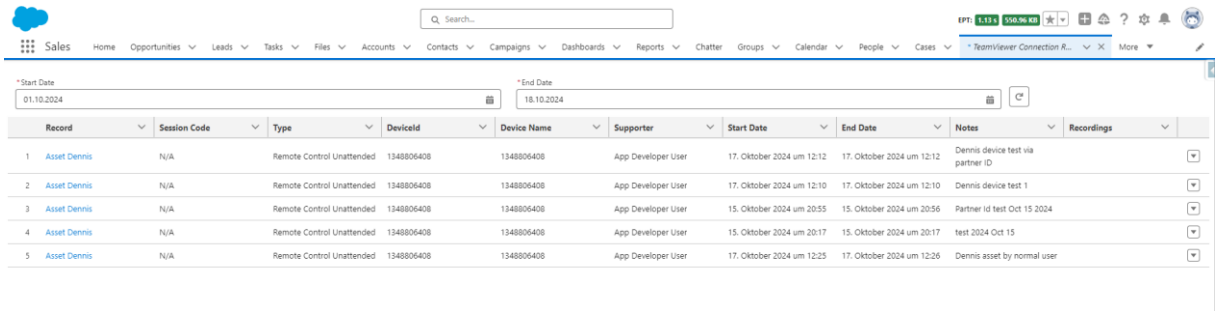


Figure 91

4.9 TeamViewer Reports

The TeamViewer package is available with 2 reports by default – TeamViewer Connections and TeamViewer Session and Connections

1) Click on the “Reports” tab.
2) Click on “All Folders” option from the left side menu.

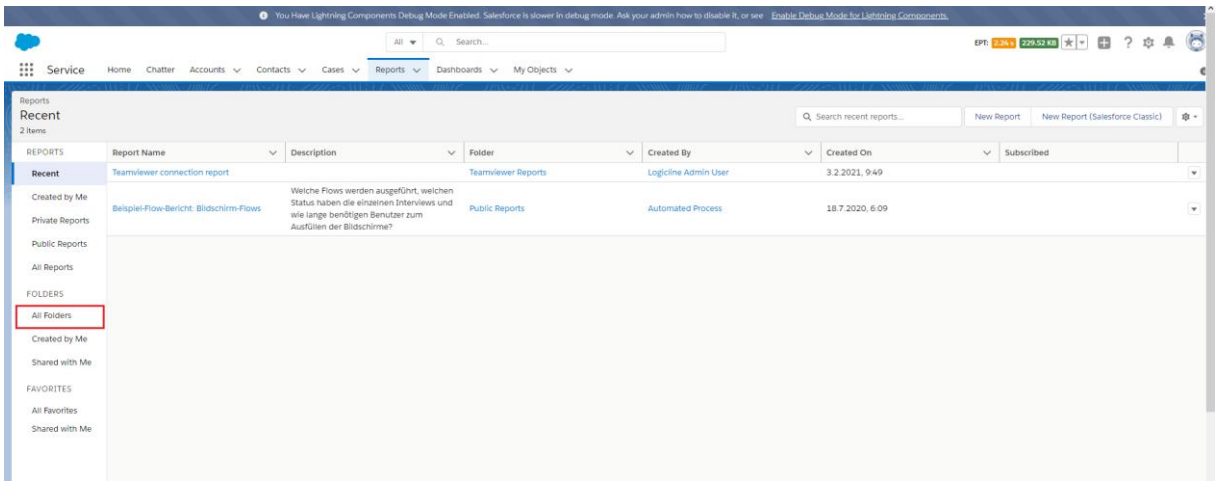


Figure 92

3) Select the latest created reports “TeamViewer Reports”.

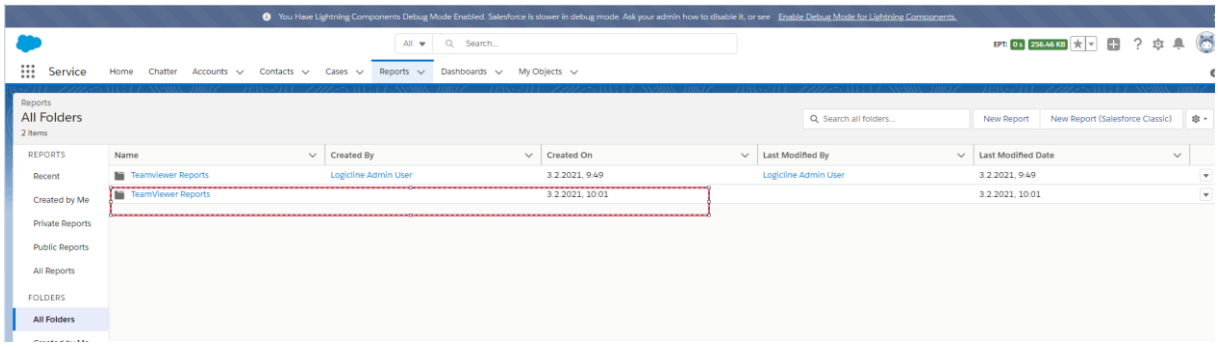


Figure 93

4) It will show the available reports with the app.

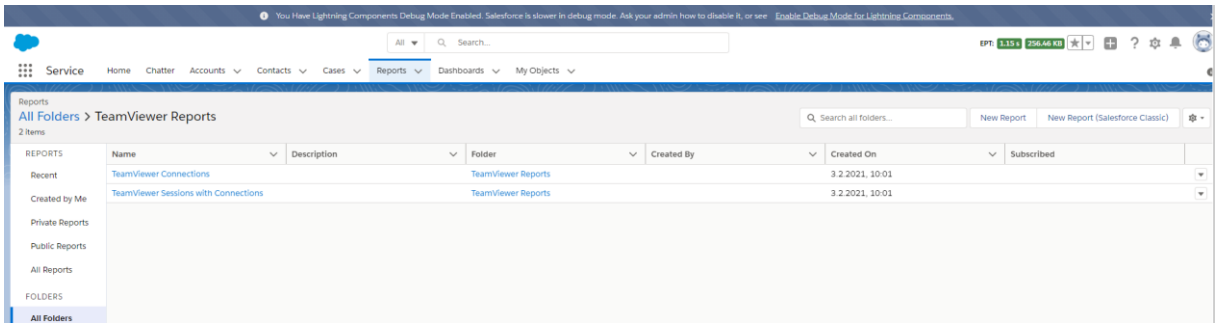


Figure 94

5) Selecting “TeamViewer Connection” will open the report containing only connections.

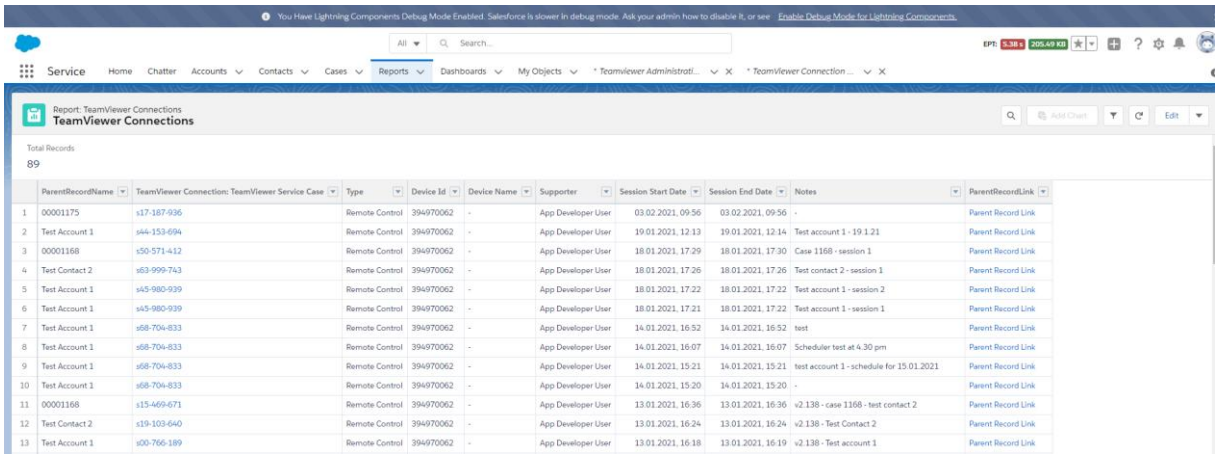


Figure 95

6) Selecting “TeamViewer Session and Connections” will open the report containing all sessions details including the connections.

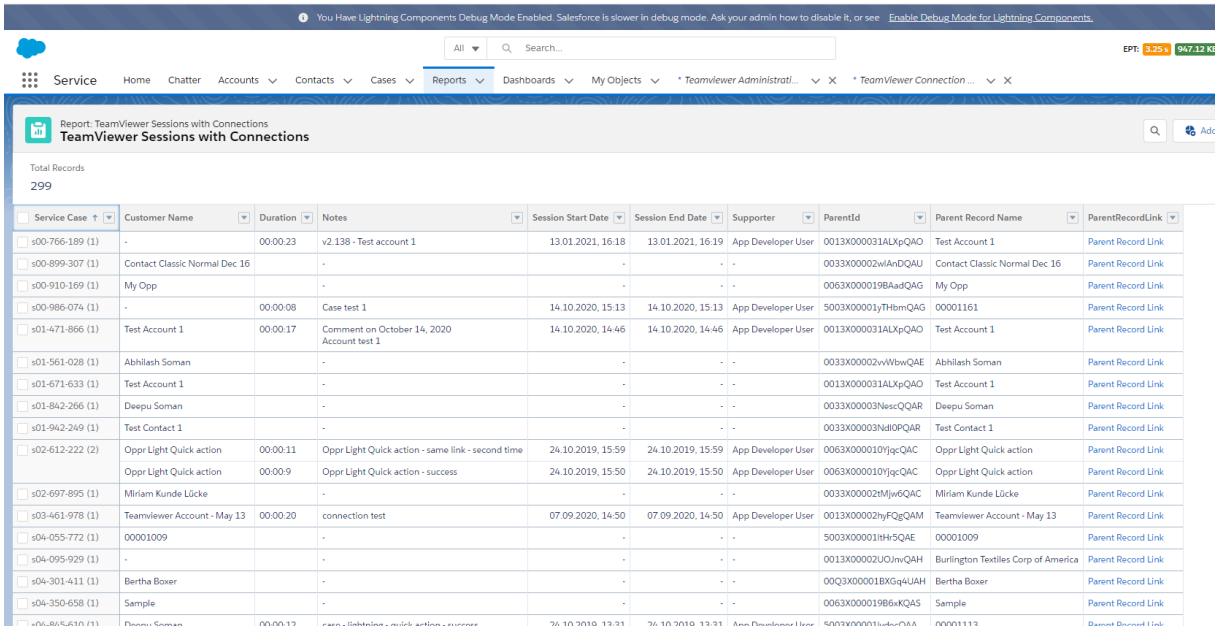


Figure 96

4.9.1 Importing the report data from the TeamViewer Backend

To keep the data between the TeamViewer backend and salesforce synchronized 2 new options are introduced in the TeamViewer Administration section:

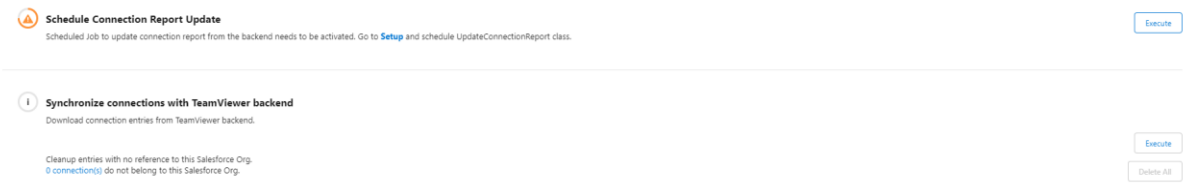


Figure 97

Schedule Connection Report Update

A scheduler has been introduced that fetches the data from the TeamViewer Company's account (set by the administrator) from the TeamViewer backend. This scheduler should be set and executed after the update.

1) Admin is allowed to update the connection report manually by clicking the "Execute" button.

Figure 98

2) Admin can also schedule the connection report update by setting up it via "Setup" link.
   a. Click on "Setup" link.

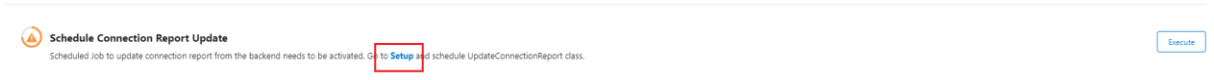


Figure 99

   b. Click on "Schedule Apex" button.

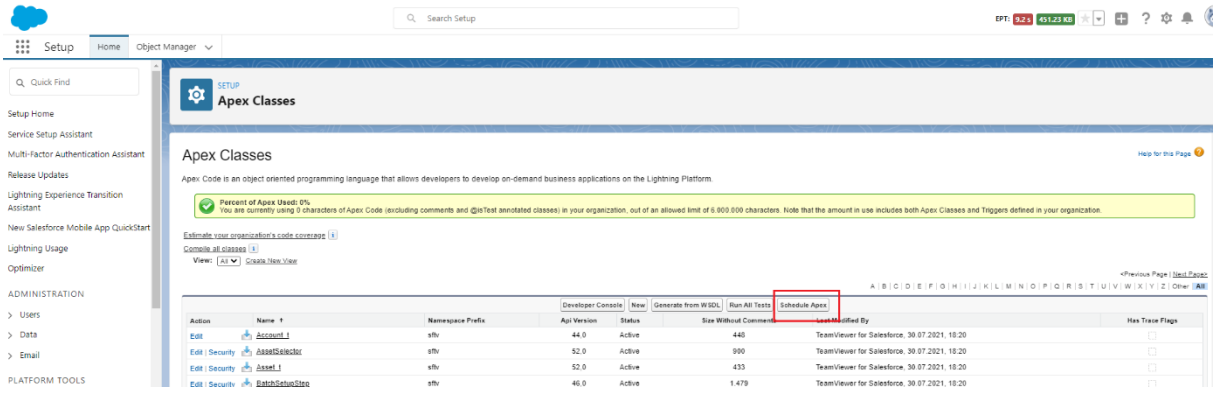


Figure 100

c. In Schedule Apex page give the following
   i) Valid Apex name.
   ii) Select “UpdateConnectionReport” from Apex Class picklist.
   iii) Frequency – Weekly or monthly.
   iv) Start date.
   v) End date.
   vi) Preferred time.

d. Click on “Save” button.

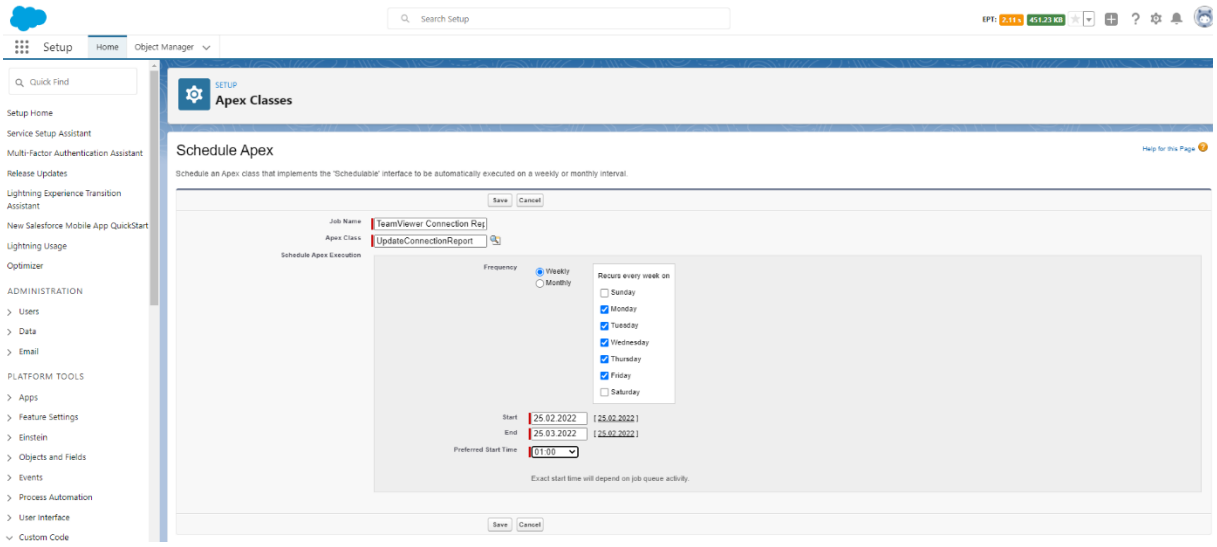


Figure 101

e. Under “Scheduled Jobs” section admin can see the newly scheduled job.

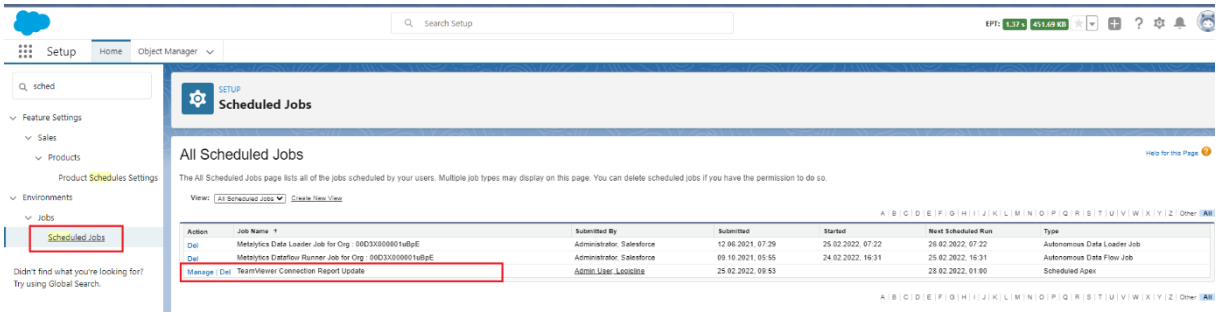


Figure 102

Synchronize connections With TeamViewer backend

This functionality is needed to synchronize data between the data format in the older versions of TeamViewer’s salesforce plugin.

1) Click on the “Execute” will open a popup.

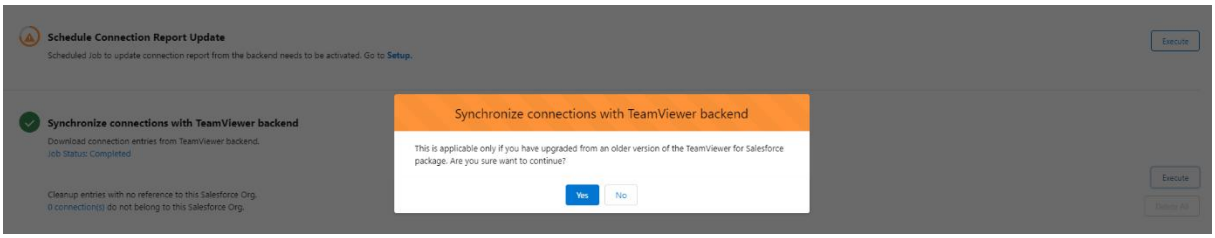


Figure 103

2) Accepting “Yes” will synchronise the connections with backend.

   Note: Please note as it was formerly possible to see data from sessions created in other salesforce orgs it can be that there are orphaned entries now, these can be shown and removed

4.9.2 Create Reports with TeamViewer and Salesforce data

TeamViewer offers two pre-configured reports for data generated by the TeamViewer sessions and connection within the TeamViewer app. This guide shows how to create reports within Salesforce with data across different objects using TeamViewer data and data provided from Salesforce.
For this, 3 steps are needed:

1) Add a field in the TeamViewer TeamViewer Session object.
2) Create a process that fills the newly created field.
3) Create a custom report type using the linked data.

4.9.2.1 Add a field in the TeamViewer TeamViewer Session object

The data field used to link the objects needs to be stored in the TeamViewer Session object.

1) Go to Setup -> Object Manager and search for TeamViewer.

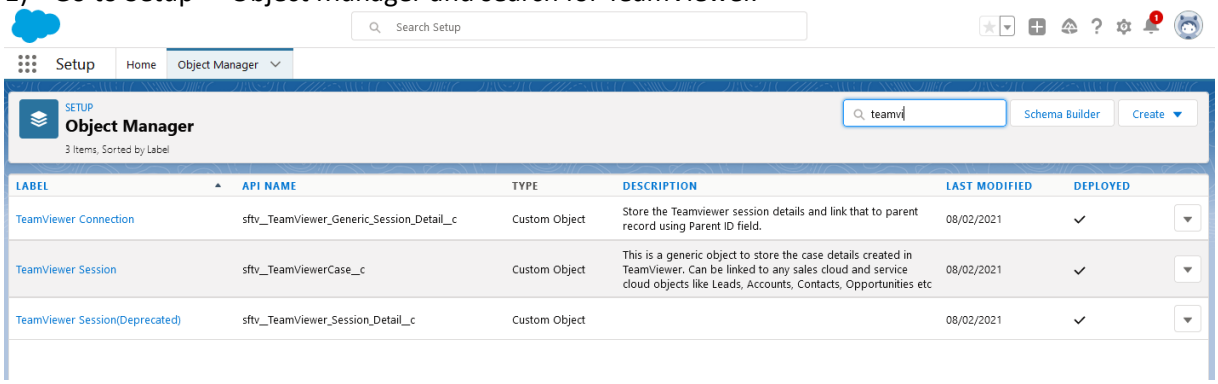


Figure 104

2) Select the TeamViewer session Object and select Fields & Relationships from the navigation bar.
3) Click “New” and create a field with following parameters by going through the wizard:
   i) Step1: Select Lookup Relationship.
   ii) Step2: Related To: the parent object you want to use for linking, e.g., Account or Case.
   iii) Step3: For fieldname use the name of the Parent object in step2 (recommendation) and use defaults or set the other fields to your needs.
   iv) Step4: Use defaults.

v) Step5: Untick the checkboxes as this information is not needed to be displayed.

4.9.2.2 Create a process that fills the newly created field

Go to Setup -> Process Automation -> Process Builder and select “New”.

a. Fill in the fields and select “A record changes” when to process should start.

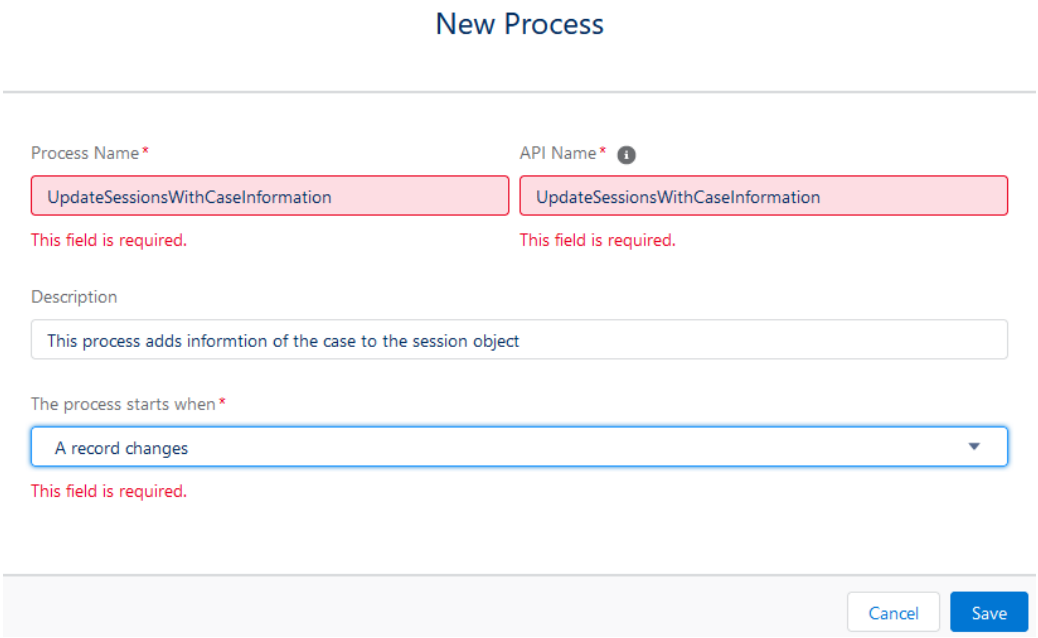


Figure 105

b. Click on “Save”.

c. Select an object in the following screen, in our case **TeamViewer Session.**

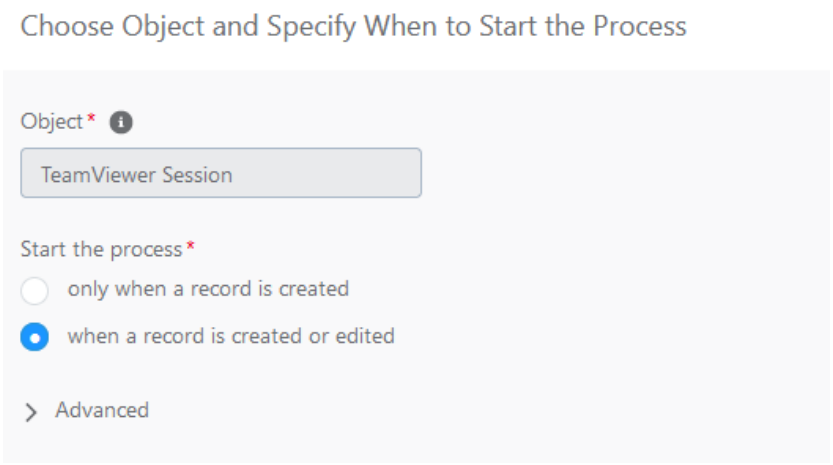


Figure 106

d. Click on the diamond symbol in the flow diagram to define an action criterion and set the following parameters:
   i) Execute when conditions are met
   ii) For field select sftv_TeamViewerCase_c
   iii) Operator: “start with”
   iv) Type: “String”
   v) Value: select the 3 beginning digits of the parentID, this can be found e.g., in the URL of the browser when looking at a parent Object (e.g., an account):

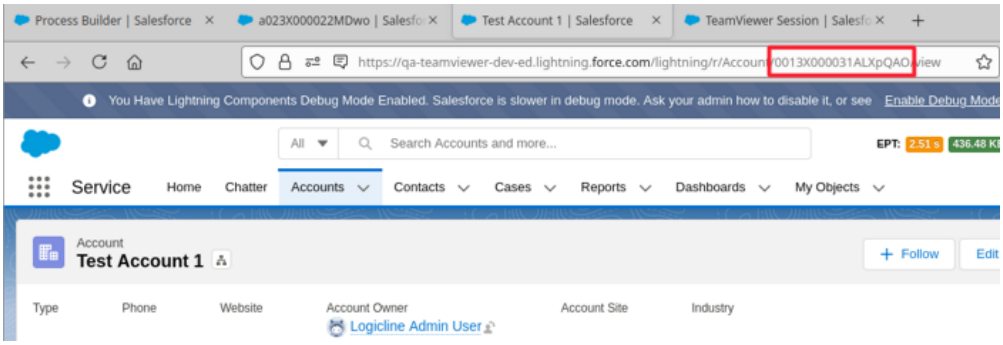


Figure 107

e. The criteria definition should then look like this:

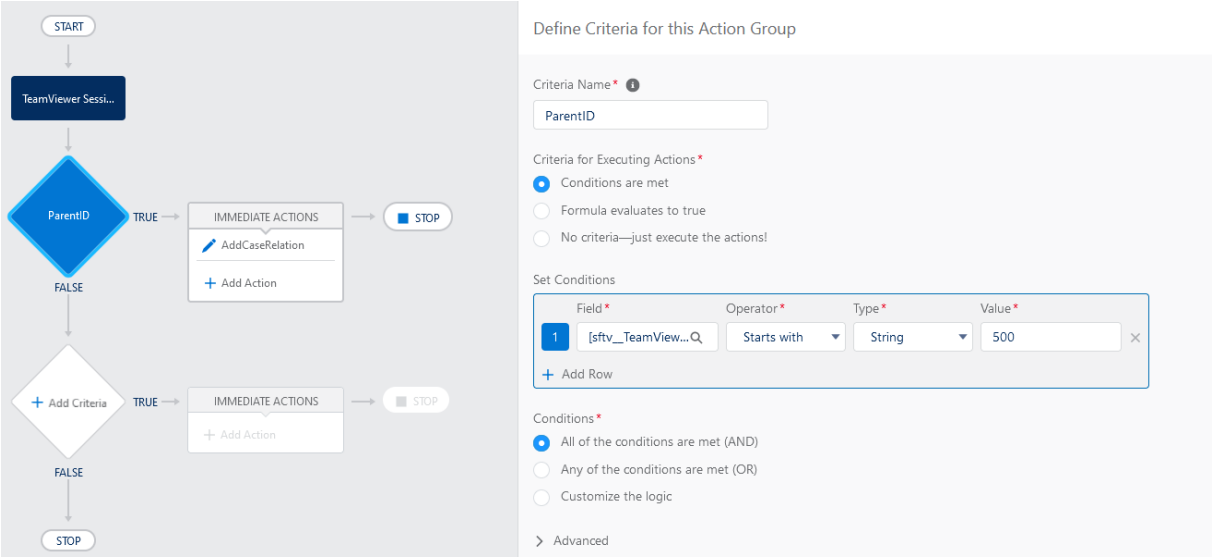


Figure 108

f. In the flow diagram click on “immediate action” and set the following parameters:

i) Criteria for updating the Records: No Criteria
ii) Field: select the field that was introduced in Step one to the session object
iii) Type: Formula
iv) Value: [sftv__TeamViewerCase__c].sftv__ParentId__c

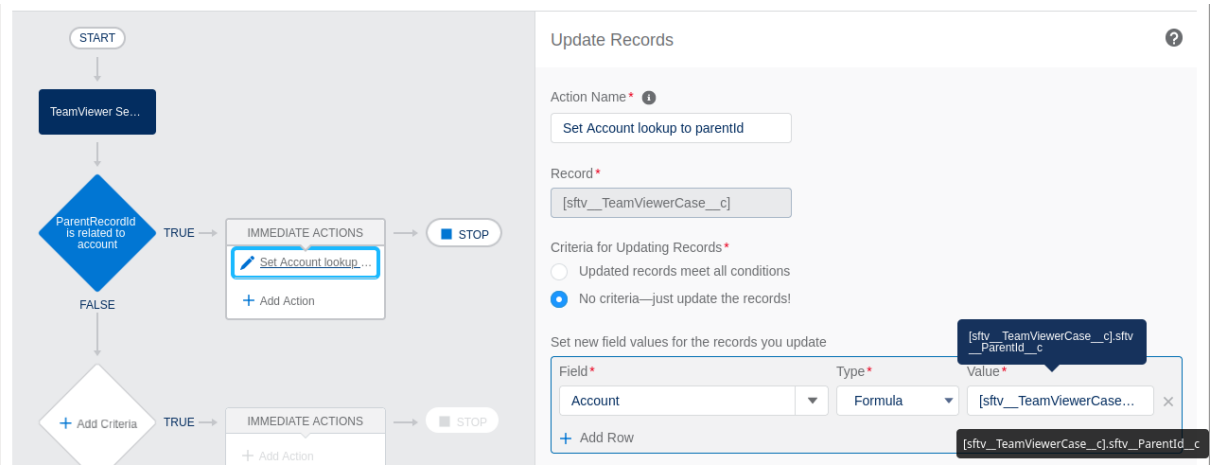


Figure 109

g. Click on “Save” and activate the process.

From now on all created sessions will be available for reports in the salesforce report section in the service cloud

Note: To add the information to existing records the following script can be executed and in the development console. It will access the entries once without changing the containing data

```
List<sftv__TeamViewerCase__c> cases = [SELECT Id FROM
sftv__TeamViewerCase__c];
    update cases;
```

4.9.2.3 Create a custom report type using the linked data

To show the Report with linked data go to Setup -> Analytics -> Reports Dashboards -> Report Types

1) Click continue and select “New Custom Report Type”.
2) Choose the object you want to show the linked data with TeamViewer and salesforce (the one you also used in step 2) a primary object.
3) Fill in the form with meaningful information.

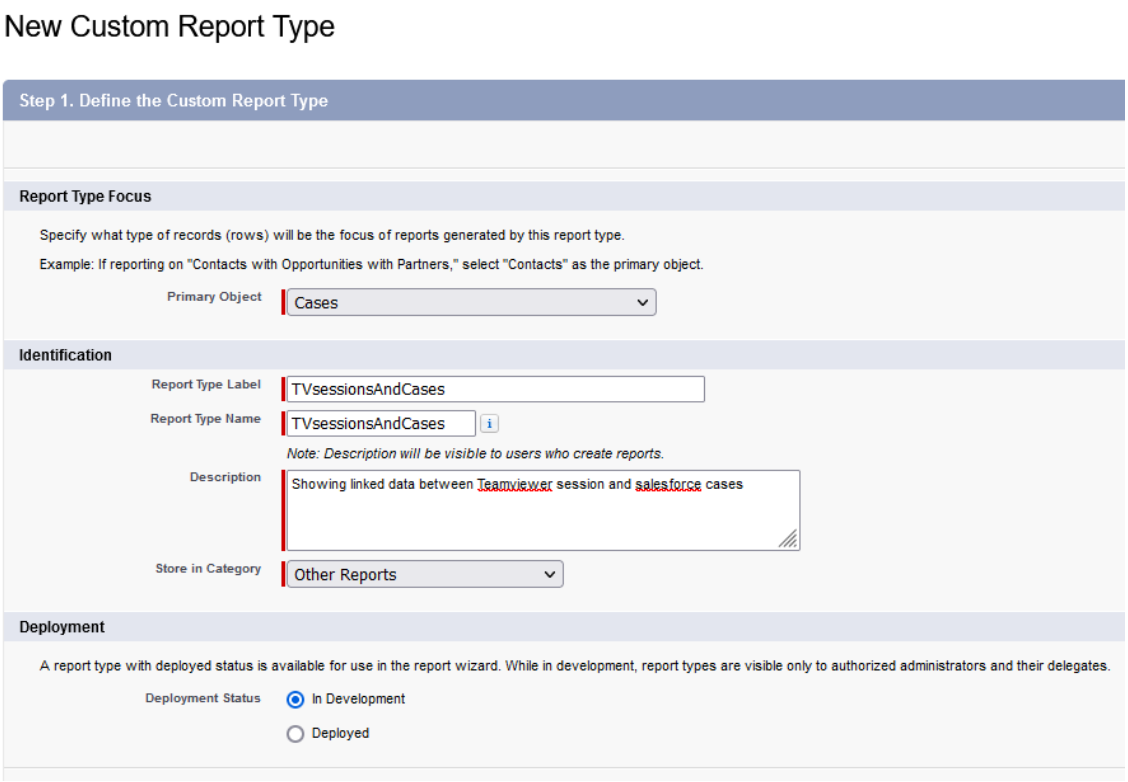


Figure 110

4) Click on “Next”
5) In the form select “Teamviewer Sessions” as related object and select the second option for the A to B relationship
6) Click on “Save”

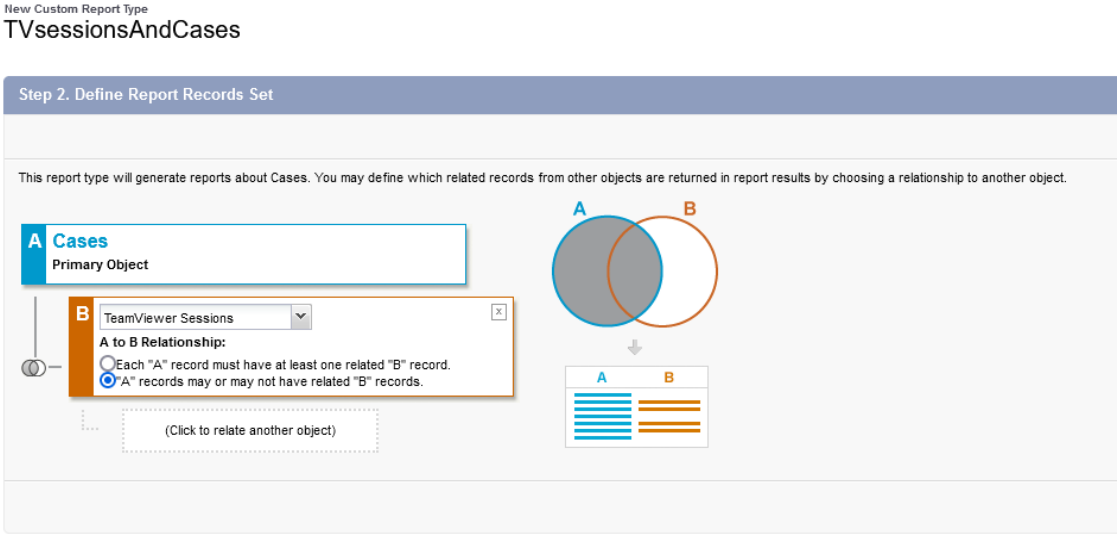


Figure 111

7) Select to fields which should be available for the report in the layout editor.

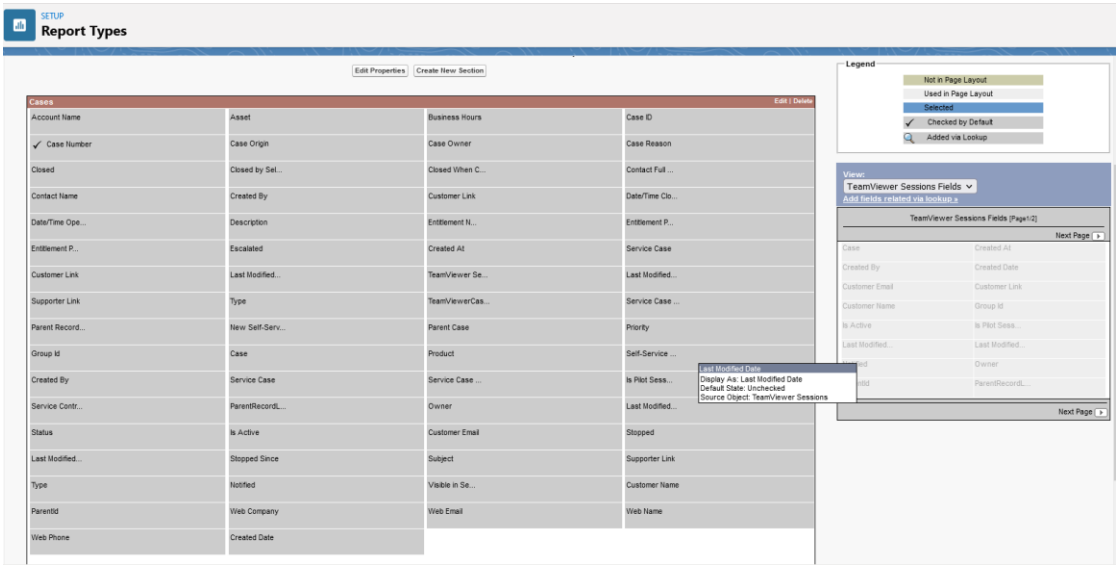


Figure 112

8) Afterwards the new record type is available in the Salesforce Report section and can be used to create dashboards.

4.10 Event log

TeamViewer provides the ability to create event logs for events which are generated during a session. They are available for the session info widget and shown as soon as a connection selected.

1) Click on the down arrow button in connection history.
2) Click on View log.

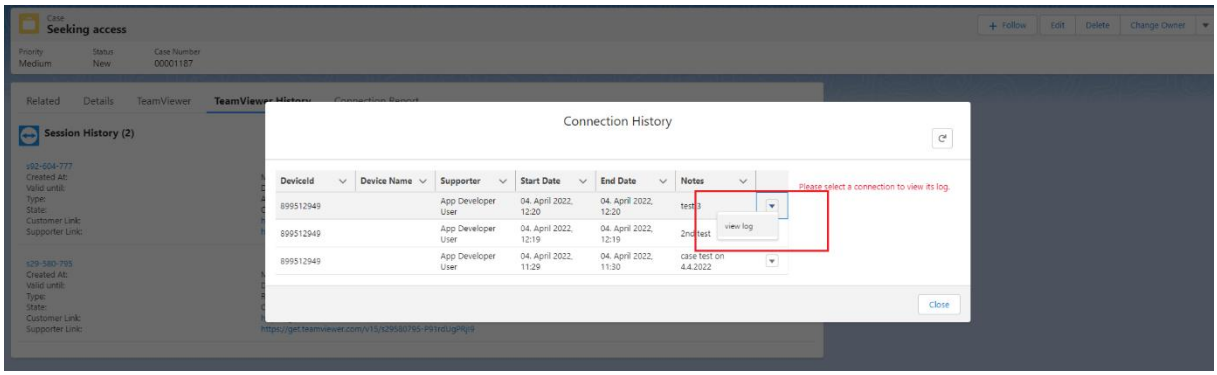


Figure 113

The log will be displayed with event and time.

4.11 Enable Unattended Access to Registered Devices

User is able to enable unattended access to registered devices in salesforce which have a matching entry in the “TeamViewer MyDevices”.

1) In Administration page, admin can configure “Match unattended devices groups with account” option.

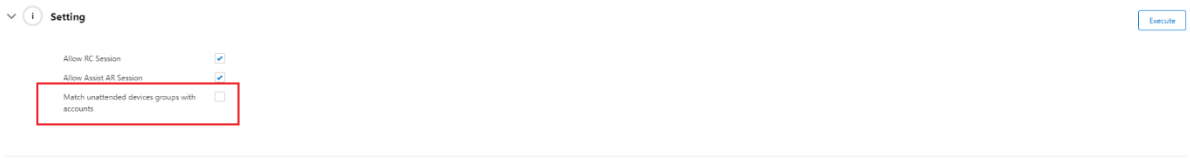


Figure 114

2) If it is not checked, then device's alias name is used to match against asset name.
3) If it is checked, device's alias and group name id is used to match against asset name and account name.

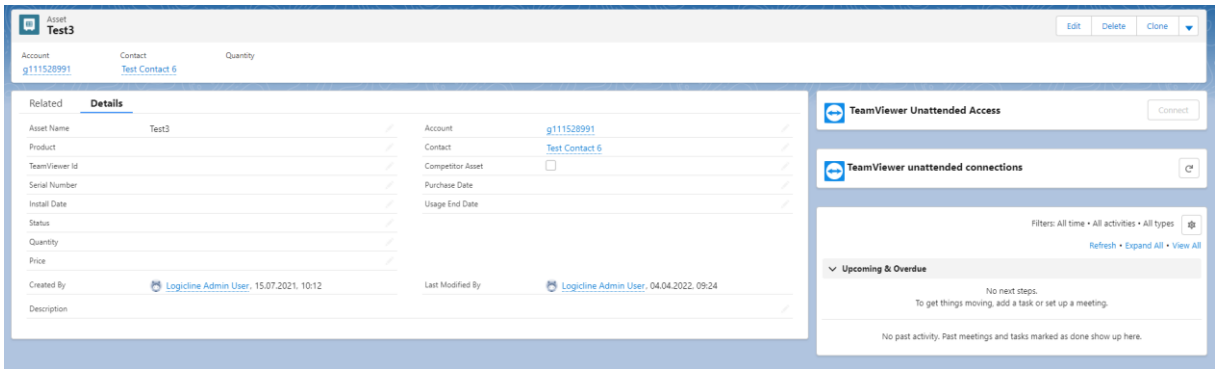


Figure 115

4) In Administration page, admin is allowed to update the TeamViewer ID manually by clicking the "Execute" button.

Figure 116

5) Admin can also schedule the TeamViewer ID update by setting up it via "Setup" link.
   a. Click on "Setup" link.

Figure 117

   b. Click on "Schedule Apex" button.

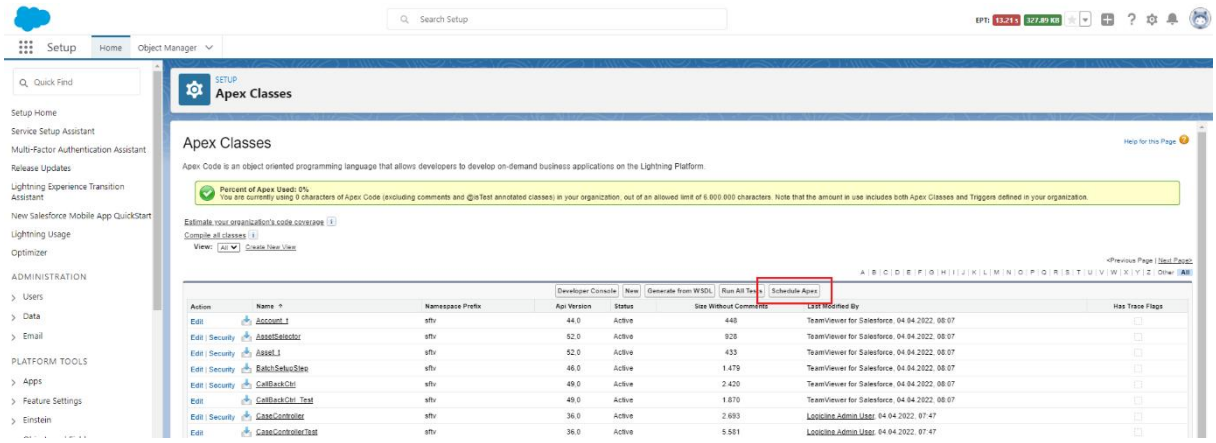


Figure 118

c. In Schedule Apex page give the following details
   i) Valid Apex name
   ii) Select “UpdateDeviceIds” from Apex Class picklist
   iii) Frequency – Weekly or monthly
   iv) Start date
   v) End date
   vi) Preferred time

d. Click on “Save” button.

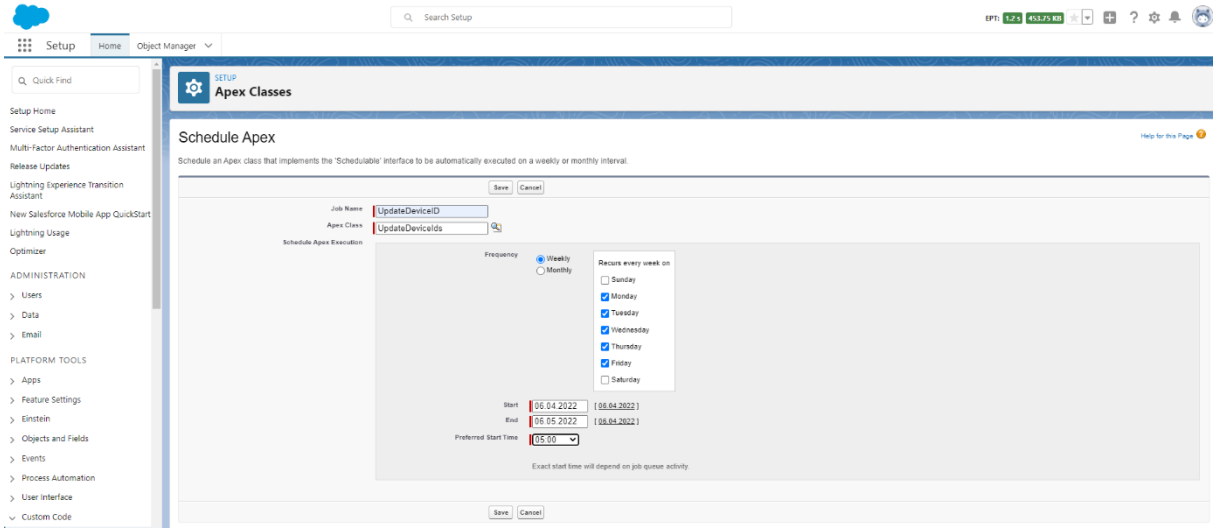


Figure 119

e. Under “Scheduled Jobs” section admin can see the newly scheduled job

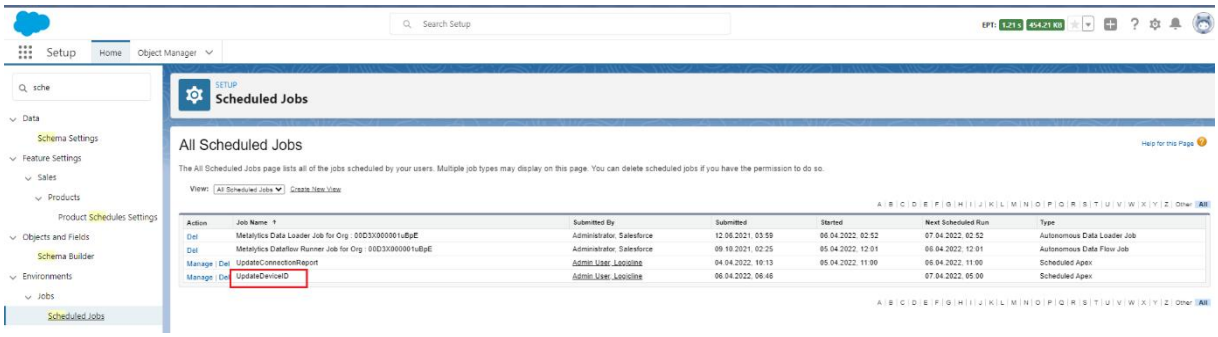


Figure 120

6) After the update, the asset gets assigned the corresponding TeamViewer ID and “Connect” button gets enabled.

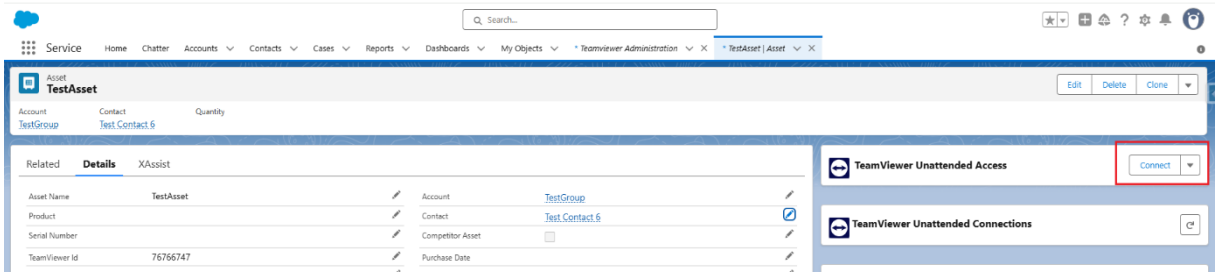


Figure 121

7) Click on the “Connect” button will generate a connection link with the format teamviewerapi://remotecontrol/?remotecontrolid=<deviceId>&thirdpartyname=<thirdpartyName>&thirdpartyid=<thirdpartyId>

   a. deviceID = TeamViewerId

   b. thirdPartyname = tv.salesforce

   c. thirdpartyid = <OrgID>-<ParentID>

4.11.1 VPN Connections for Unattended Access

User can use VPN connection mode for the unattended connections. To use it

1) Click on the downarrow near the „ Connect“ button.

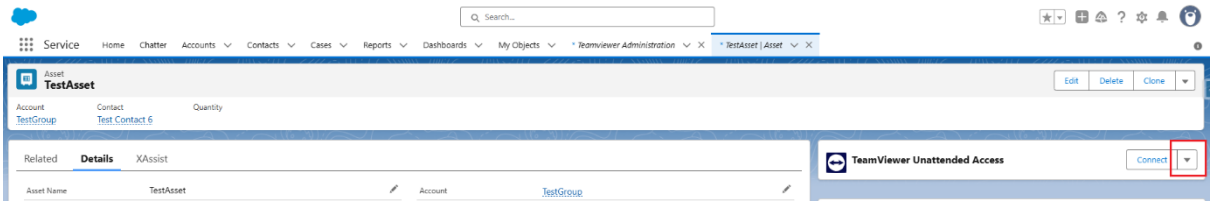


Figure 122

2) This will show another option „ Connect via VPN“.

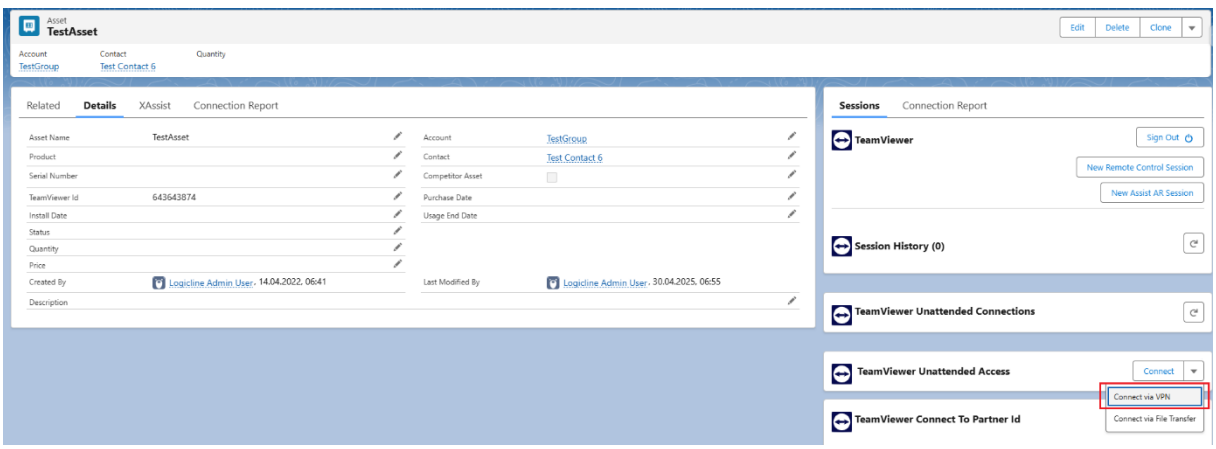


Figure 123

3) Click on „Connect via VPN“ will open a URL in new tab with mode=vpn.

4.11.2 File Transfer for Unattended Access

User can use Filetransfer connection mode for the unattended connections. To use it

1) Click on the downarrow near the „ Connect“ button.
2) Click on the „Connect vis File Transfer“ button.

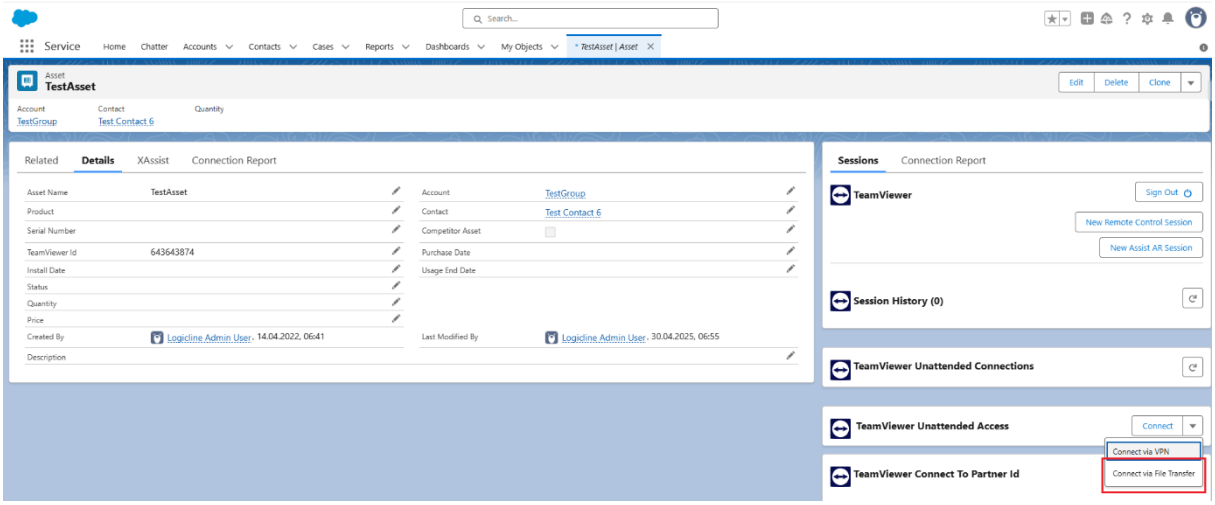


Figure 124

4.12 TeamViewer WEB based Version

TeamViewer has created a web based client. This client allows supporters/admins to join sessions out of a browser window.

1) In TeamViewer Administration page, admin can configure “Allow Web Based Client” option.
2) By default, it is enabled.

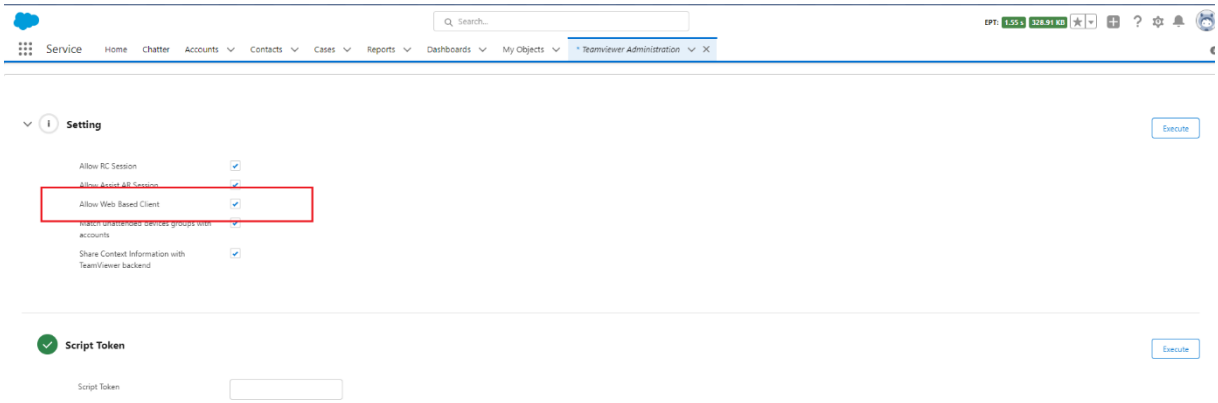


Figure 125

3) If it is disabled, both Remote Control and Pilot session will work as normal.

4) If it is enabled, both Remote Control and Pilot session will be having a new button “Join as admin from browser”.

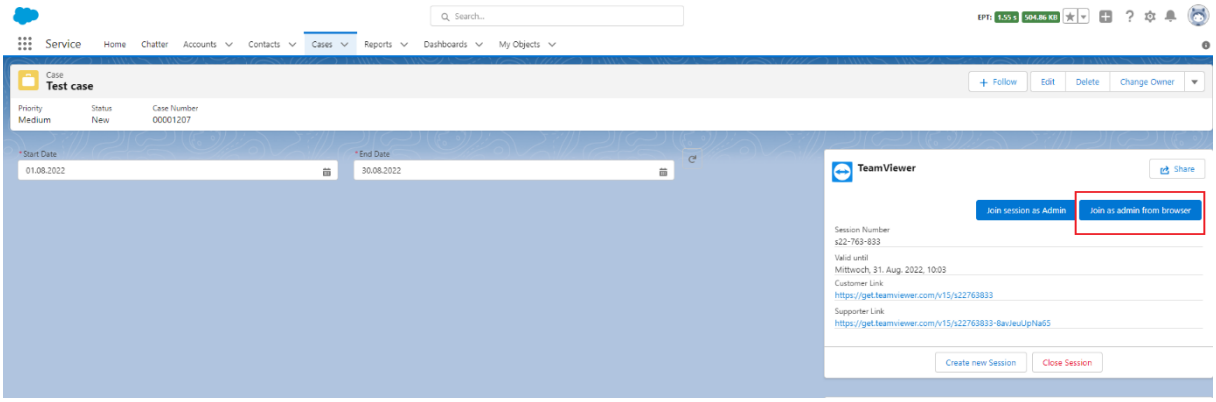


Figure 126

5) Clicking on this button will allow the supporters/admins to join session out in a browser window. TeamViewer client installation is not required for supporter in this case.

4.13 Optional Session Context

In normal case when a session is created, the app sends the context information like customer name, email, description to the TeamViewer backend. Admin can deactivate this feature.

1) In TeamViewer administration page, there is an option “Share Context Information with TeamViewer backend”.
2) By default, it is checked.

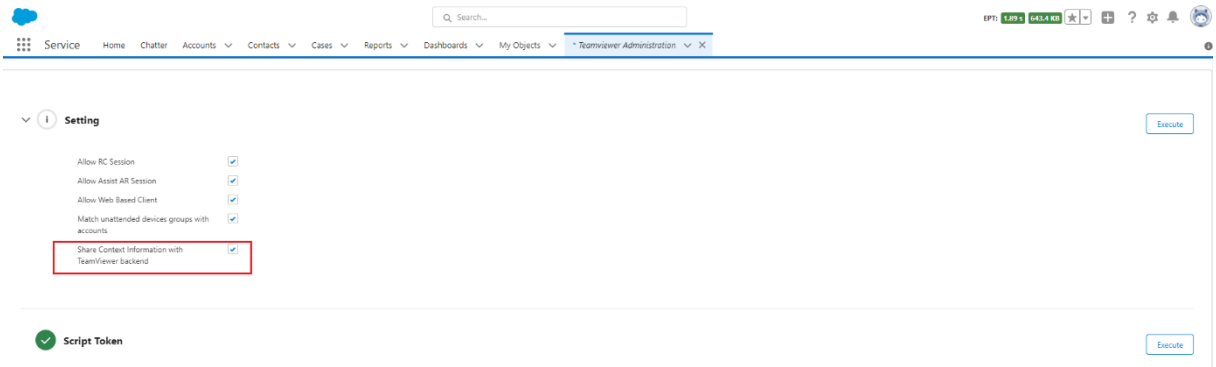


Figure 127

3) If it is checked then, on creating a session, context information like customer name, email, description will get shared to TeamViewer backend.
4) If it is unchecked, on creating a session, context information will not get shared to TeamViewer backend.

4.14 xAssist Call and Report

To use the xAssist call and to get the reports, you need to set up the frontline administration end point.

4.14.1 Frontline Administration setup

1) Load Frontline Administration tab.

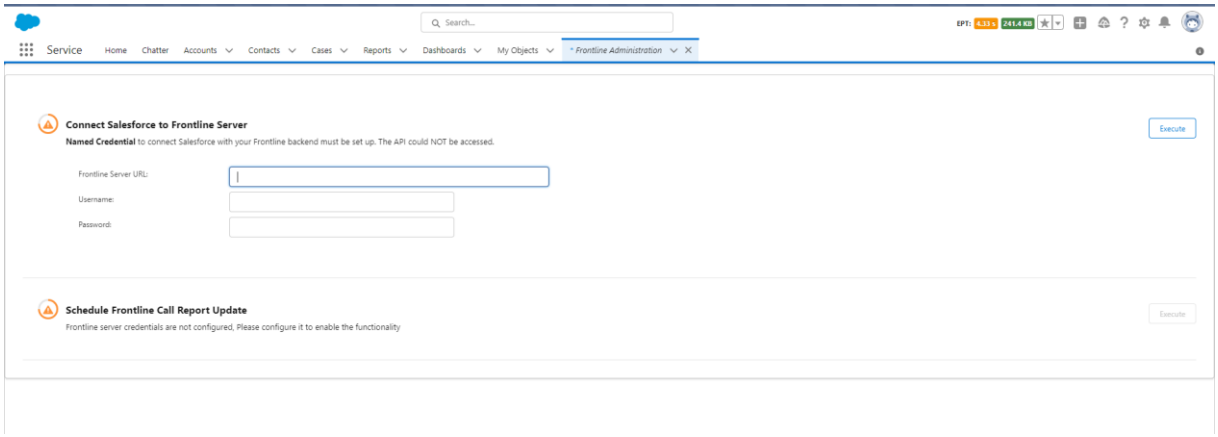


Figure 128

2) Fill Frontline Server URL, Username and Password and click on “Execute” button.

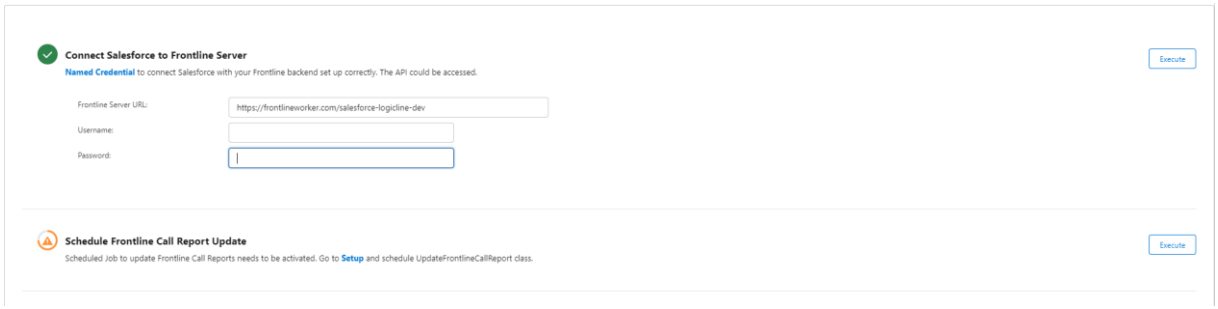


Figure 129

4.14.2 xAssist Call

1) When you load the “xAssist Call” tab for first time it will look like.

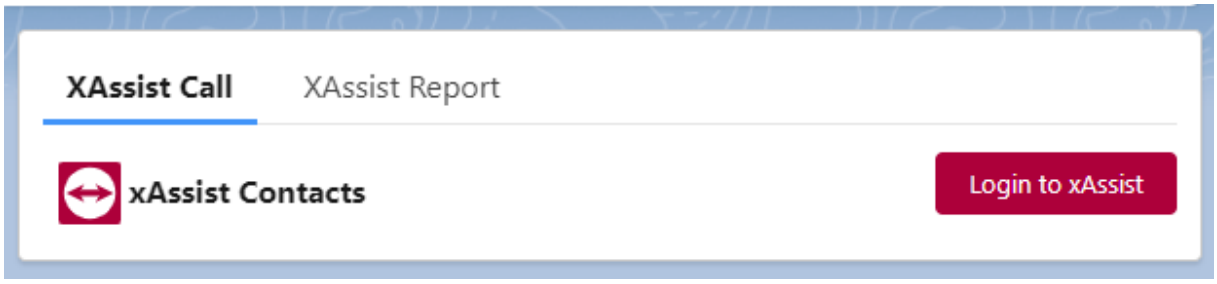


Figure 130

2) Clicking on “Login to xAssist” button will load a new browser tab with Frontline login page.

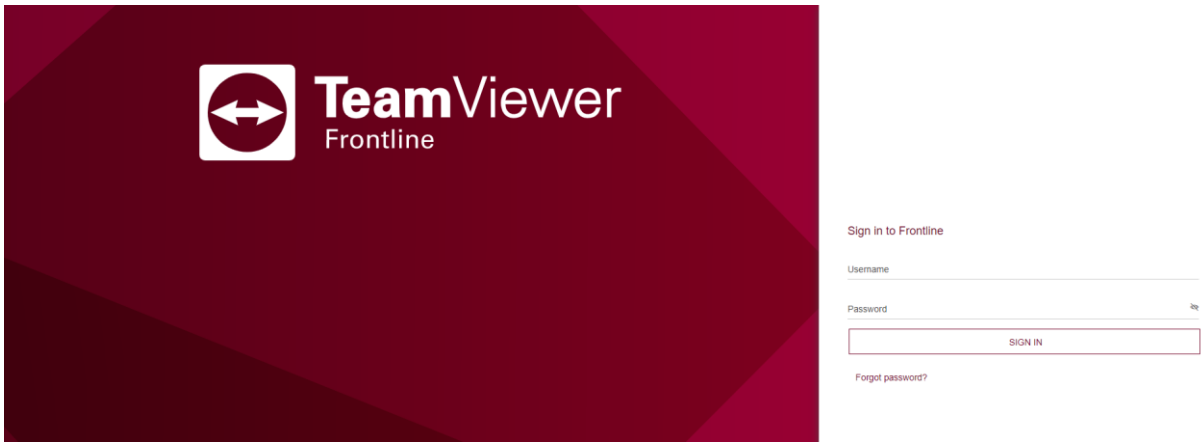


Figure 131

3) Enter username, password and click on “SIGN IN” button and you will get logged into FCC page.
4) Click on TeamViewer Salesforce browser tab and refresh the page. xAssist contact list will be displayed with all contacts from API.
5) The contacts who are online will have a “Call” button and the contacts who are offline will have a “Notify” button.
6) The call list will get updated automatically every 5 seconds.
7) The call widget also has an option to invite an external user.

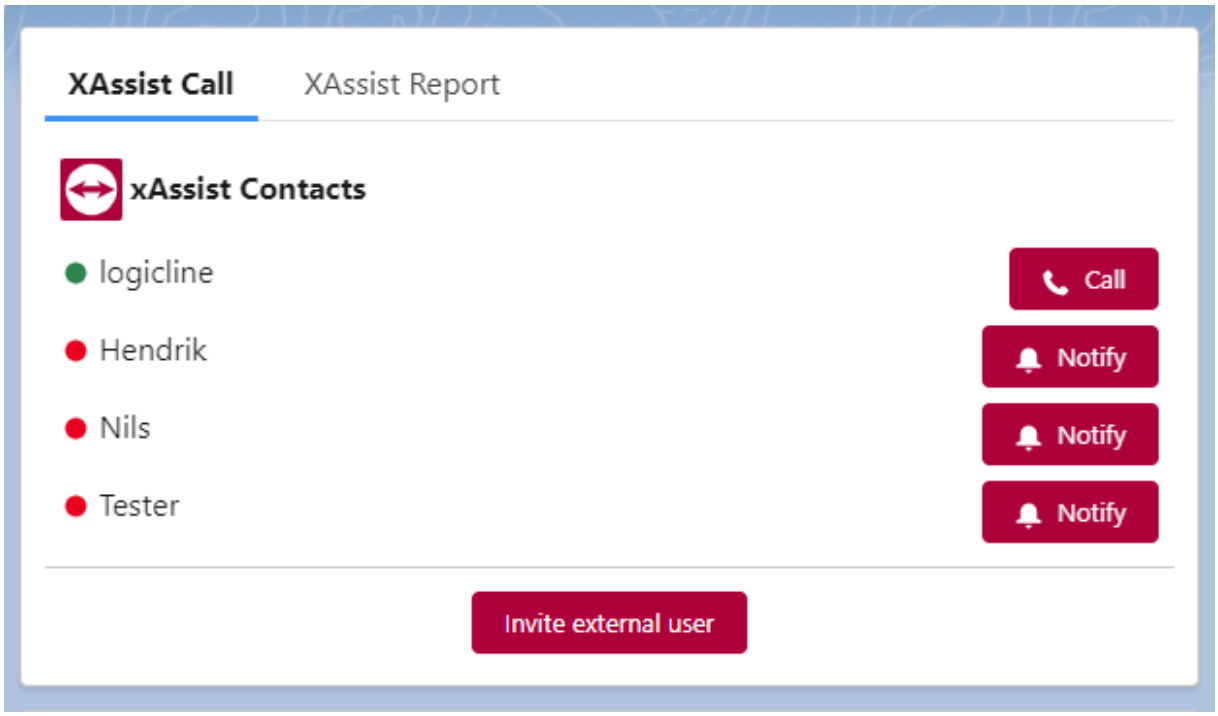


Figure 132

4.14.2.1 Notify user

1) Click on “Notify” button of an offline user.
2) An email will be sent to the user with option to join the call.
3) A new tab will be displayed with Frontline Command Center to initiate the call.

4.14.2.2 Call user

1) Click on “Call” button of an online user.
2) A call request will be sent to the user.
3) A new tab will be displayed with Frontline Command Center to initiate the call.
4) An email will also be sent to the user.

4.14.2.3 Invite external user

1) Clicking on “Invite external user” button will open a popup to fill the Name and option to fill the phone number and email.

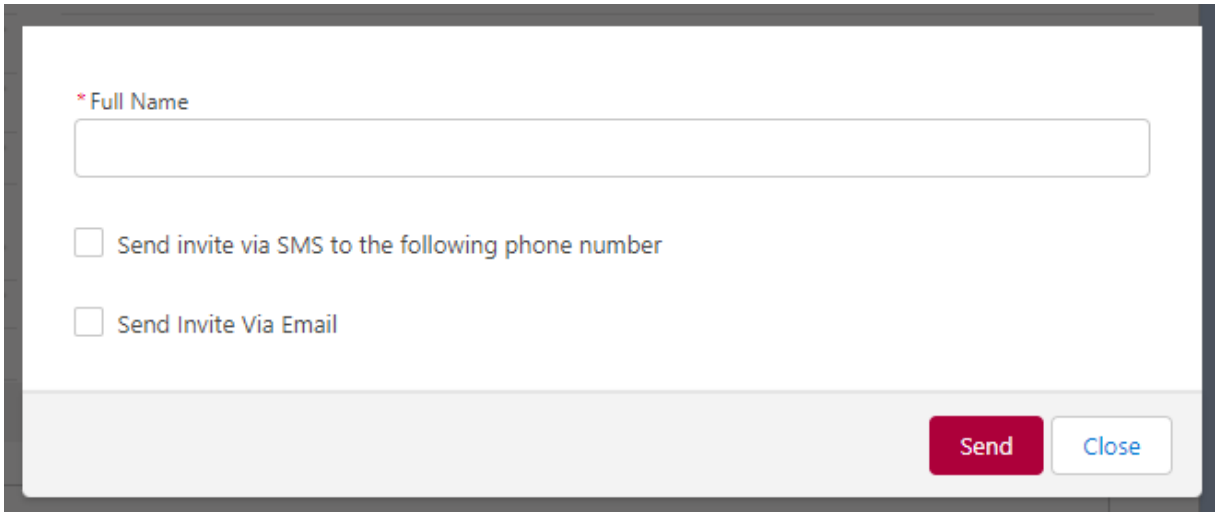


Figure 133

2) You can send the invitation either via email or via SMS or both. For that select the checkbox for SMS or email or both.

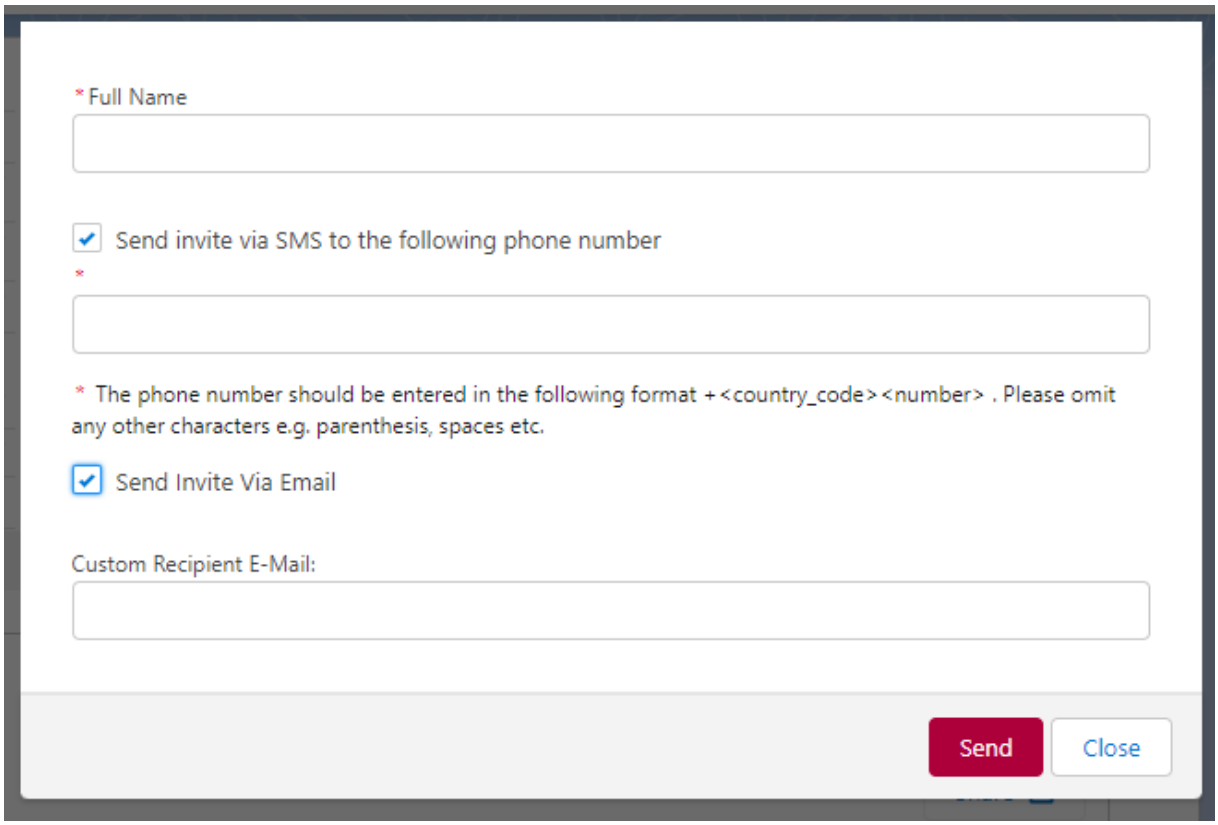


Figure 134

4.14.3 xAssist Report

The reports generated for xAssist calls can be viewed in xAssist Report tab.

1) Click on the “xAssist Report” tab.

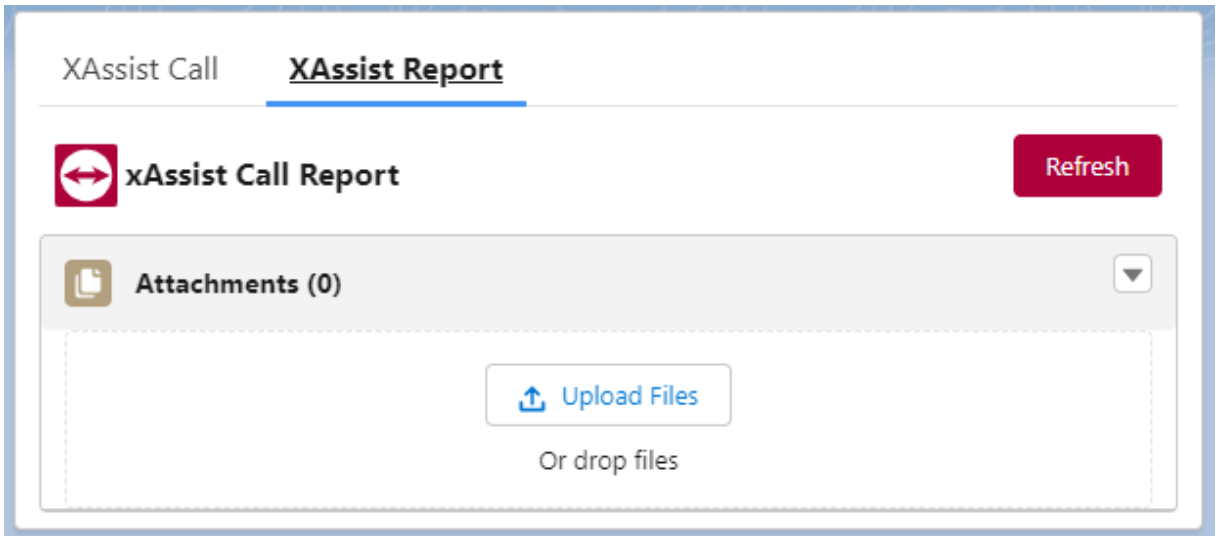


Figure 135

2) Click on “Refresh” button.

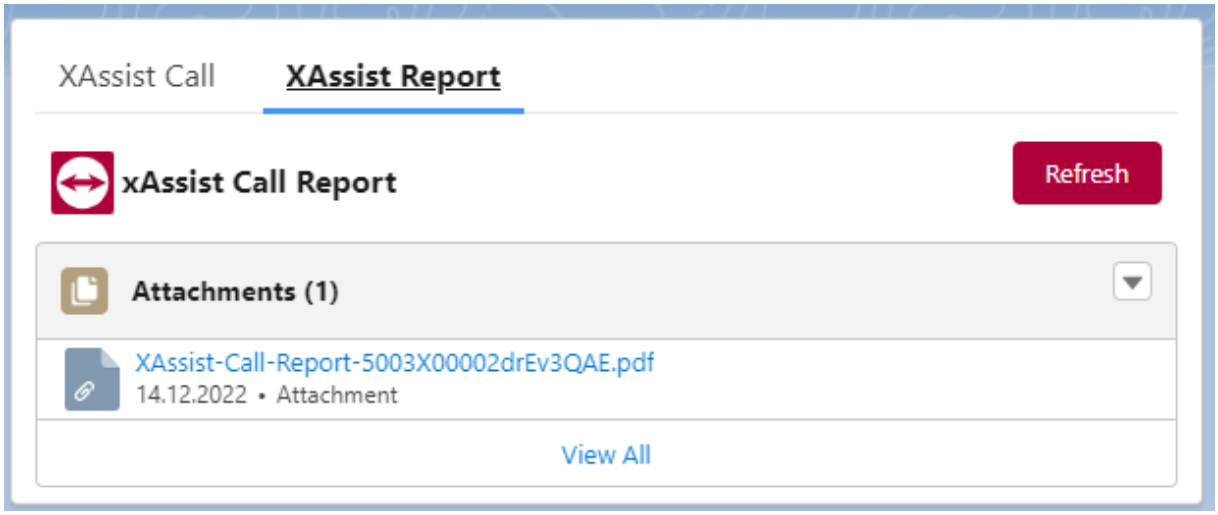


Figure 136

4.14.3.1 Manual Report update

1) You can manually update the xAssist reports on the Frontline Administration page.
2) Click on “Frontline Administration” tab.
3) Click on “Execute” button.

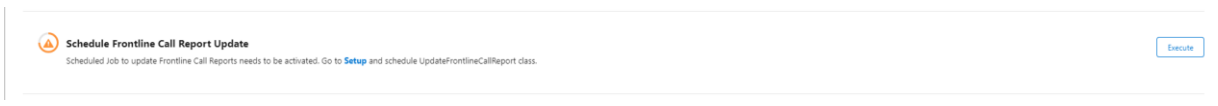


Figure 137

4.14.3.2 Schedule Report update

You can schedule the report update on the Frontline Administration page.

1) Click on “Frontline Administration” tab.
2) Click on “Setup” link.

Figure 138

3) Click on “Schedule Apex” button.

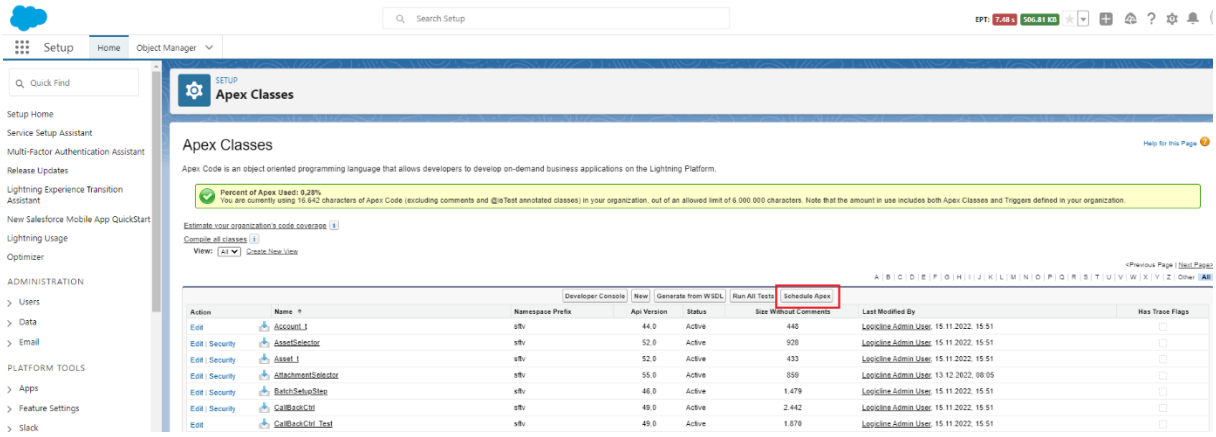


Figure 139

4) Fill job name and select “UpdateFrontlineCallReport” from the Apex class.
5) Fill in the other details and click on “Save” button.

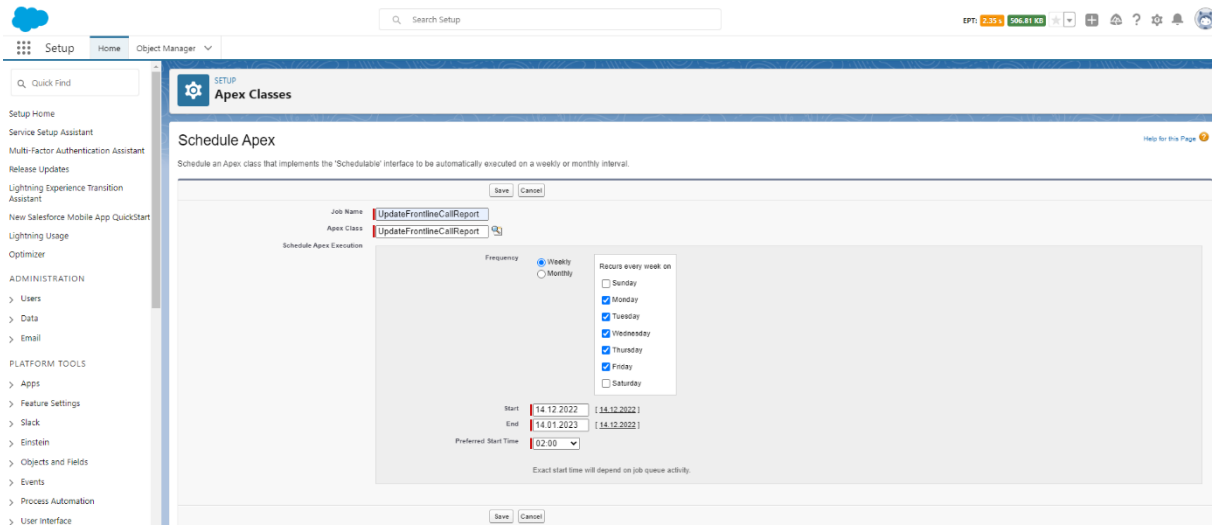


Figure 140

6) Refresh the Frontline Administration page.

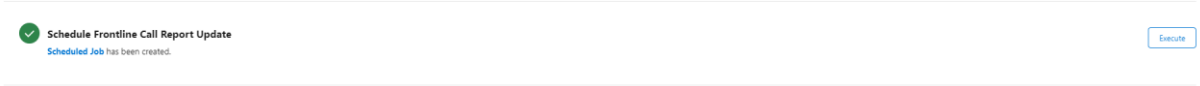


Figure 141

4.15 TeamViewer MyDevices

To access devices that are assigned to your TeamViewer account out of your salesforce application. TeamViewer provides the MyDevices overview. From the App Launcher, select “TeamViewer MyDevices”. In the tab a table with the devices is and if that device is online, you will be able to see a **Connect** button in that row.

1) Click on Connect button will open a new browser tab with URL “teamviewerapi://remotecontrol/?remotecontrolid=<deviceId>&thirdpartyname=<third partyName>” where
   a) deviceId is TeamViewer Id
   b) thirdPartyname=”tv.salesforce

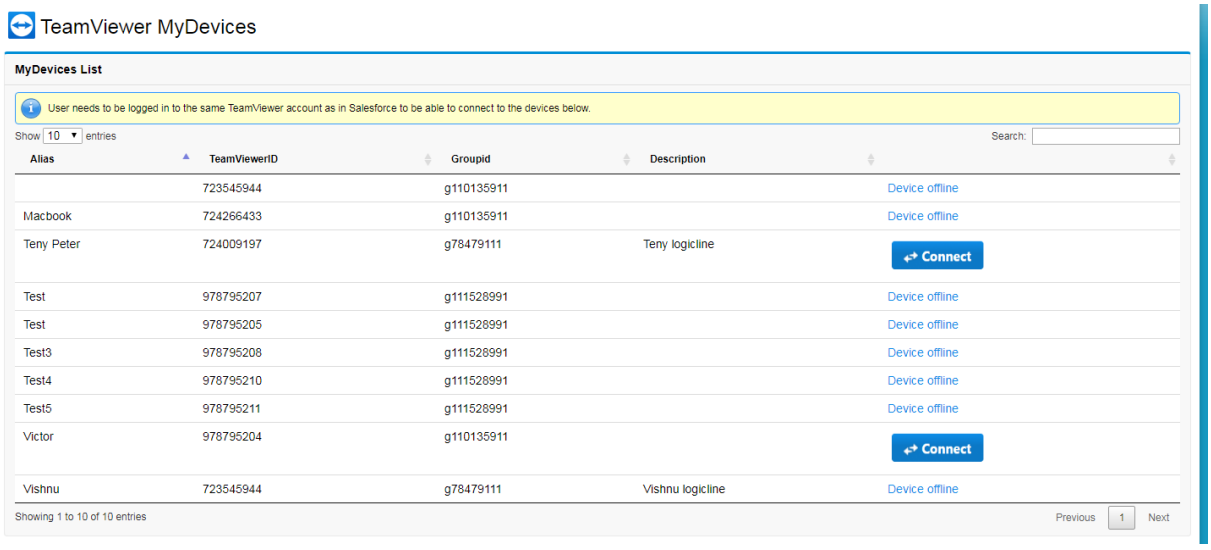


Figure 142

4.16 TeamViewer Session Notification

TeamViewer app provides a notification feature where the Salesforce user will get a desktop notification when a customer connects to a TeamViewer session. The salesforce user can join the session by clicking the notification. Below is the screenshot of the notification. Look and feel will be slightly different in different browsers as the notification depends on browser.

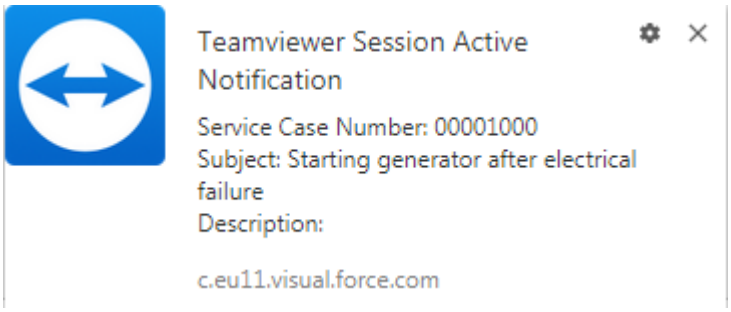


Figure 143

To get the notification, you need to enable the notifications in browser settings. The steps to enable notification might be different for different browsers. The notification feature is available in Salesforce lightning, classic and console. But the configuration step is different for each of them.

4.16.1 Enable TeamViewer notification in Salesforce classic

We have included a home page component for notification to show notification in Salesforce classic. Below are the steps to enable the notification in Classic.

1) Assign home page component to a home page layout by going to Home Page Layouts section in Setup.

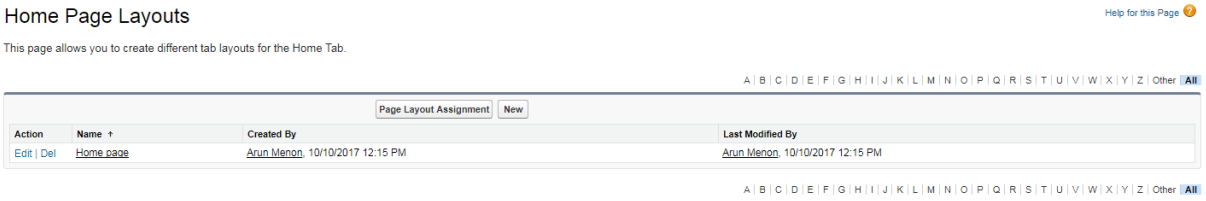


Figure 144

2) Click Edit in the home page layout where you want to add the notification component.

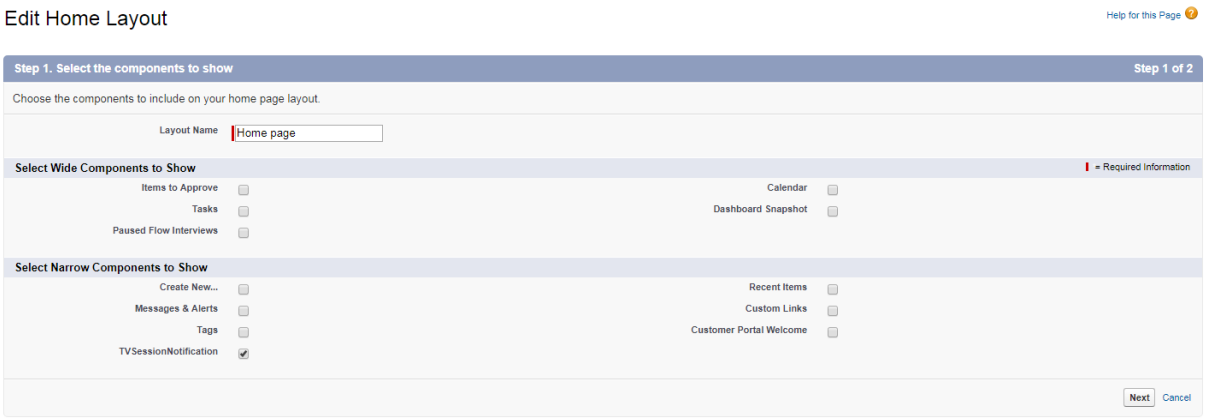


Figure 145

3) You need to tick the checkbox next to TVSessionNotification component to make it available in home page.
4) In order to make the home page component to be available in all pages, we need to enable that option in Setup -> User Interface.

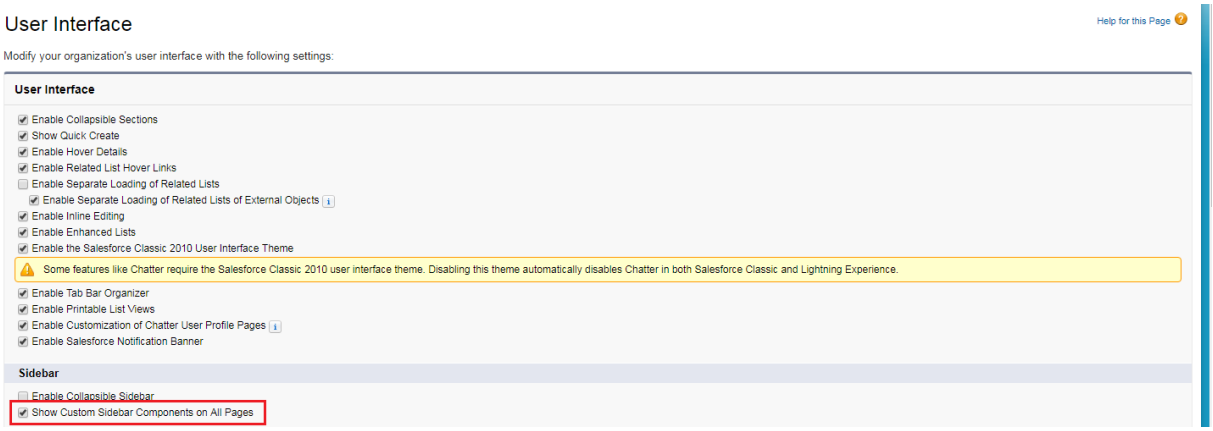


Figure 146

4.16.2 Enable TeamViewer notification in the Salesforce console

We have included a console component in our package to show session notification in Salesforce console. Below are the steps to enable notification in the console.

1) Edit the console app in which you need to include the notification

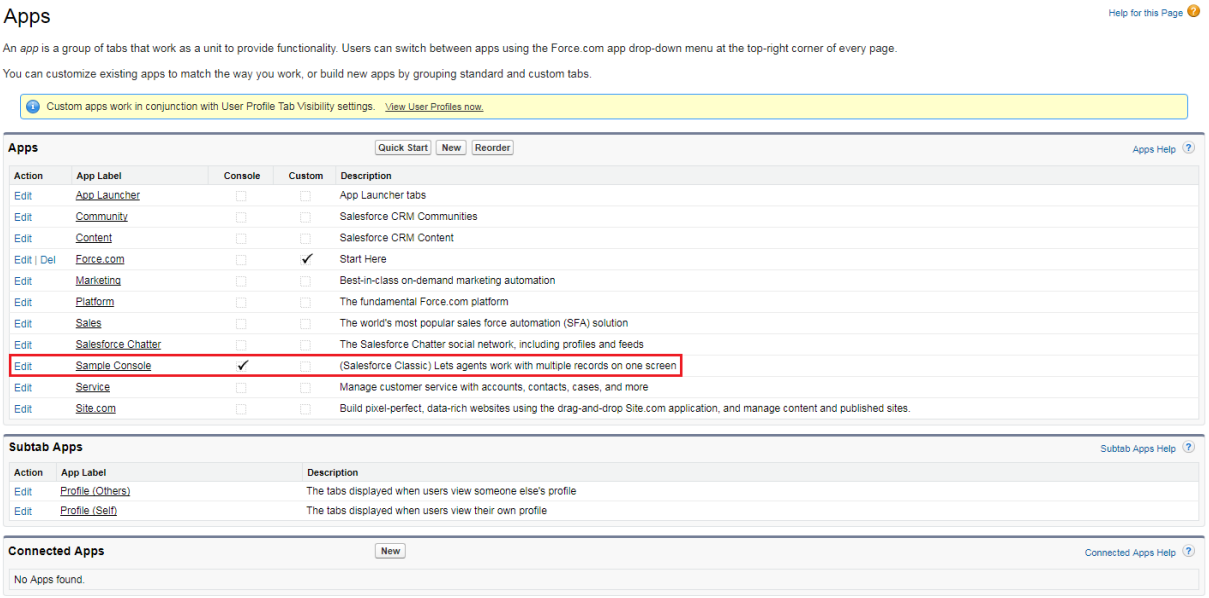


Figure 147

2) Select TVSessionNotification component in the section Choose Console Components and add that to Selected Items.
3) The notification component will be added at the bottom right corner in Console app.

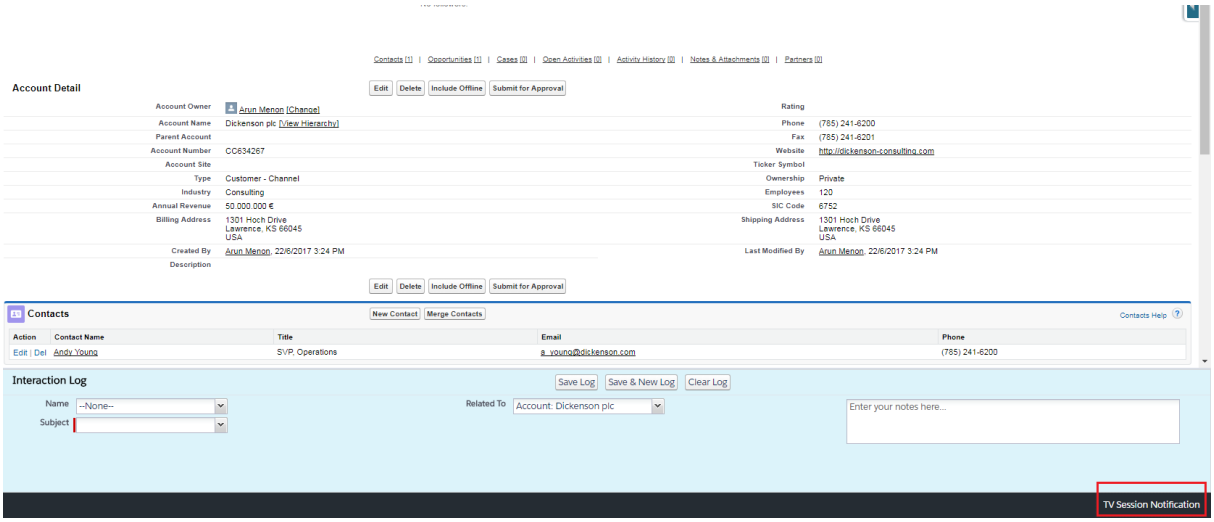


Figure 148

4.16.3 Enable TeamViewer notification in Salesforce lightning

In the lightning experience, to enable notification you need to go to Setup -> Apps -> App Manager.

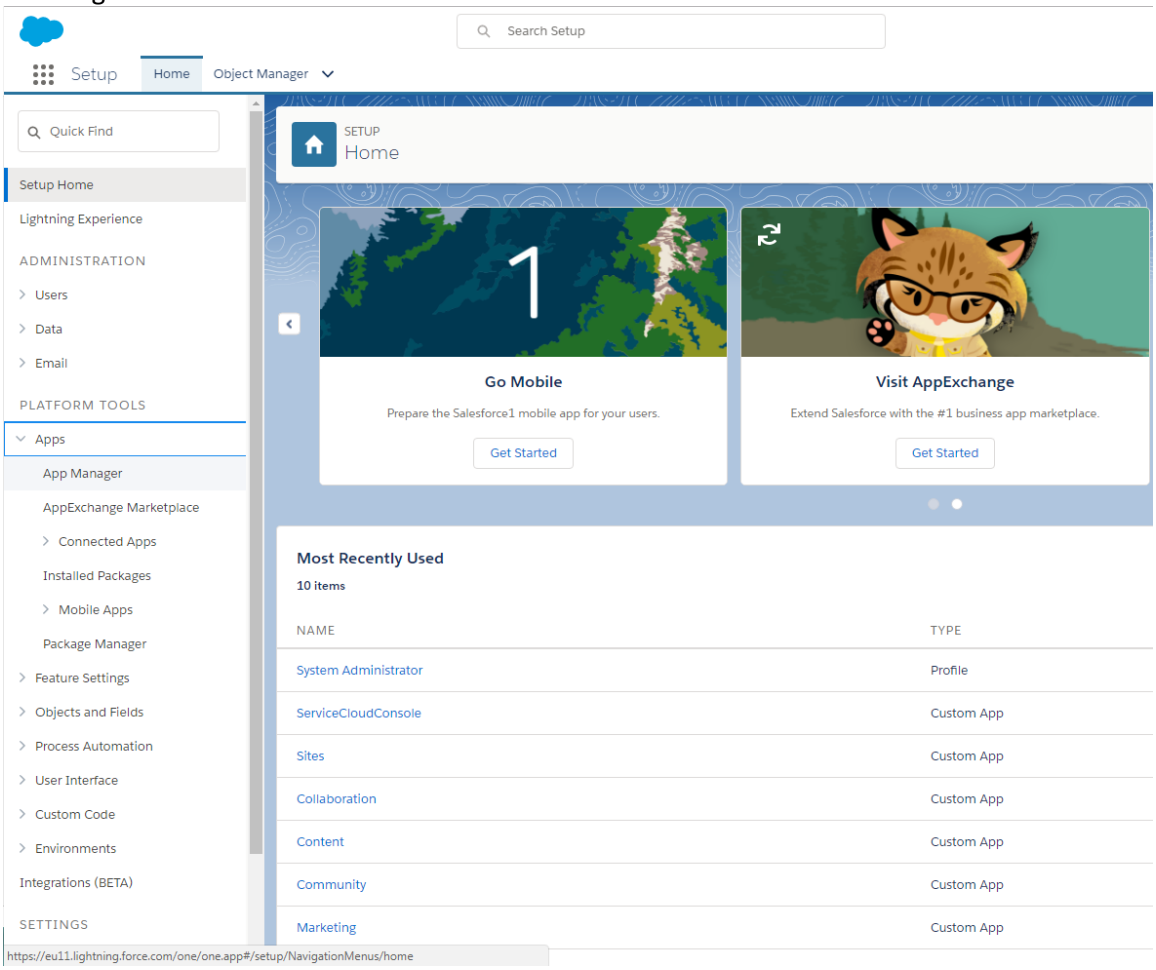


Figure 149

1) The notification can be added only in Apps with App Type Lightning.
2) Edit the app in which you need to add notification.
3) When you edit the app, you will see a section Utility Bar.
4) Click Add and select Visualforce.

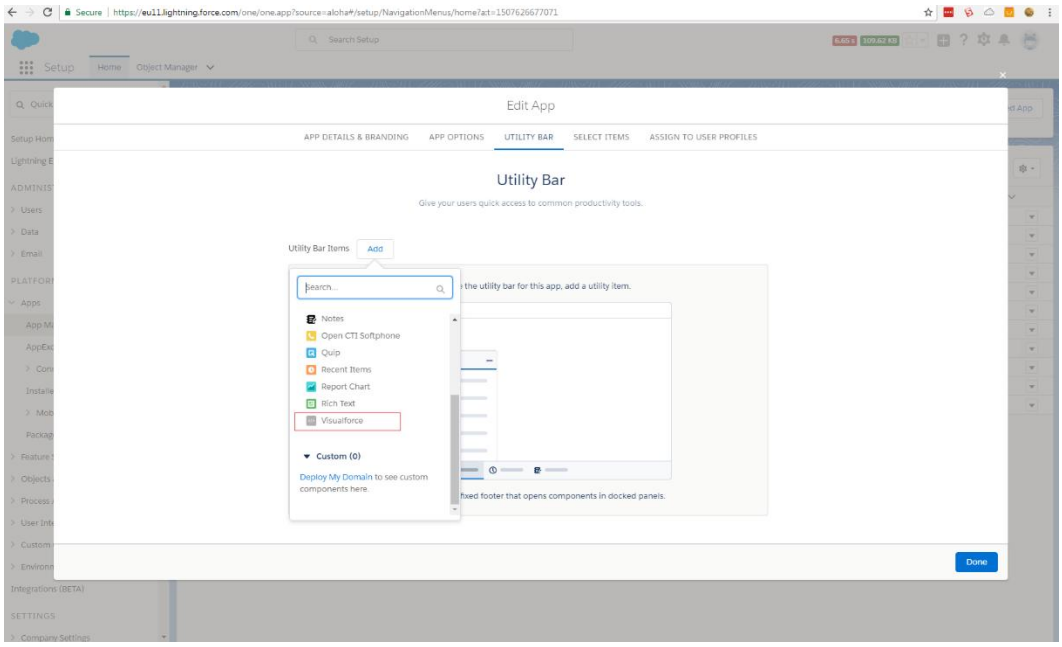


Figure 150

5) Provide a suitable label and select **tvSessionNotification** from the dropdown list for Visualforce Page Name. Make sure that you tick **Load in background when app opens** checkbox.

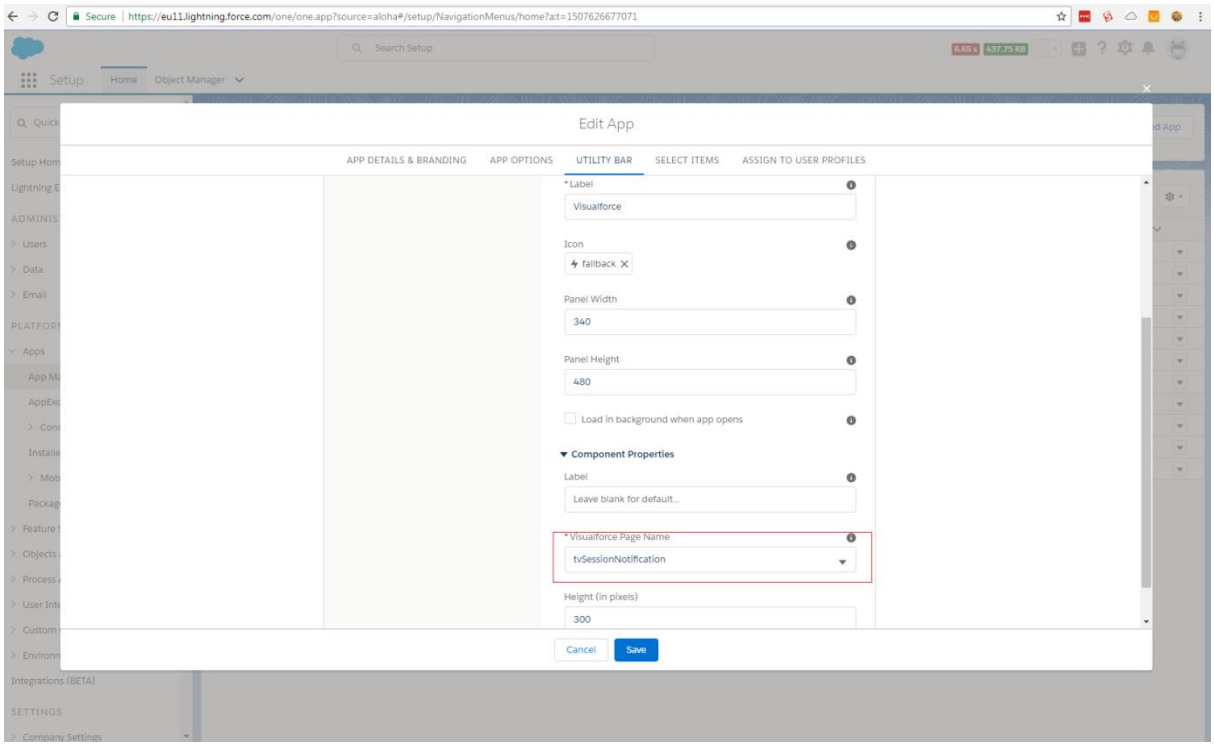


Figure 151

4.17 TeamViewer Connect to Partner ID

1) To connect to a TeamViewer ID directly load any record detail page in which “TeamViewer Connect To Partner Id” is already added.
2) If asset detail page is loaded and asset field is set in TeamViewer Administration page, the Partner Id field will get populated with corresponding value.
3) If not, fill in a TeamViewer ID and click on “Connect” button.

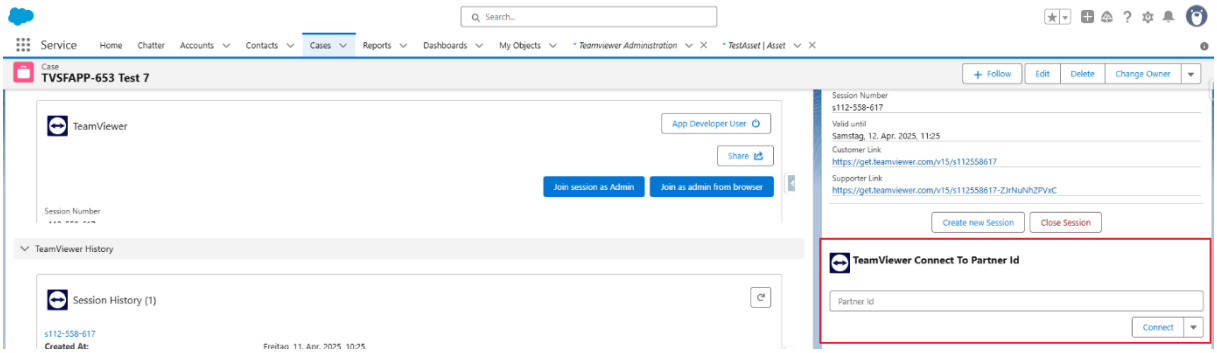


Figure 152

4) This will open a new browser tab with URL “teamviewerapi://remotecontrol/?remotecontrolid=<deviceId>&thirdpartyname=<third partyName>&thirdpartyid=<thirdpartyId>” where
   a. deviceId is TeamViewer Id
   b. thirdPartyname is tv.salesforce
   c. thirdpartyid is <OrgID>-<ParentID
5) Click on “Launch Installed TeamViewer” and click on “Open TeamViewer”.

Note: The session made via TeamViewer Partner ID will be displayed with type as “Remote Control Unattended” and session code as “N/A”.

4.17.1 VPN Connections for Partner ID

User can use VPN connection mode in TeamViewer connection to Partner ID widget. To use it

1) Click on the downarrow near the „ Connect“ button.

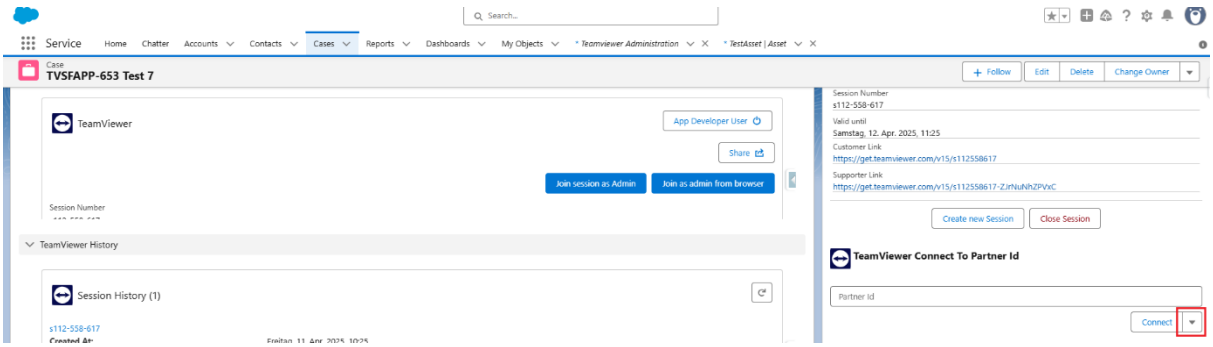


Figure 153

2) This will show another option „ Connect via VPN“.

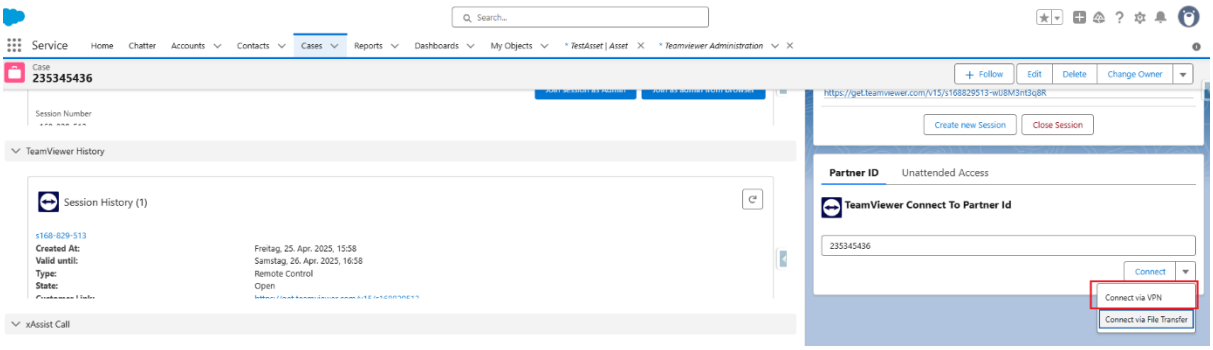


Figure 154

3) Click on „Connect via VPN“ will open a URL in new tab with mode=vpn.

4.17.2 File Trasfer for Partner ID

User can use File transfer connection mode in TeamViewer connection to Partner ID widget. To use it

1) Click on the downarrow near the „ Connect“ button.
2) Click on „Connect via File Transfer“ button.

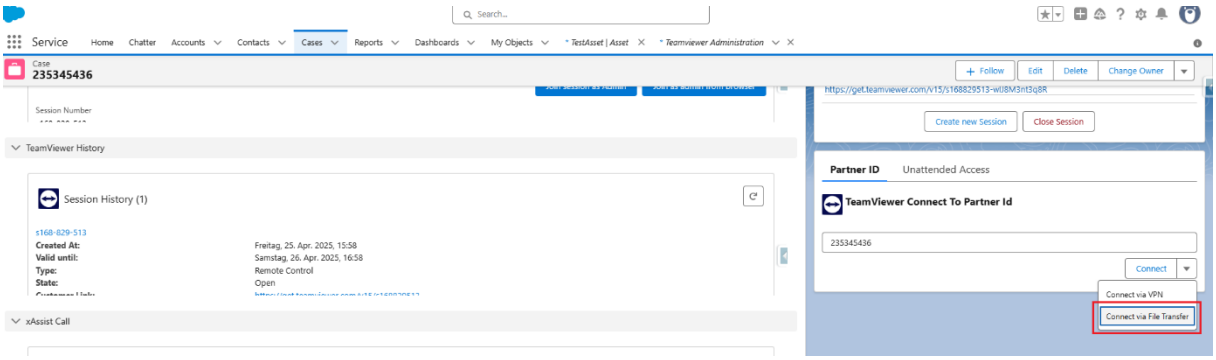


Figure 155

4.17.3 Connect to Parter ID on Case

In normal case Connect to Partner ID in Casse record page works as mentioned above. But there is an option to pre-populate the connect to partner id on case with the TeamViewer id stored on asset. This is possible only is the asset is linked to the case. If an asset is linked on a case and it has a TeamViewer ID linked to it, the TV id shall be displayed on the connect to partner id widget. This overrules the settings in Administration page.

4.18 Support for Experienced Cloud

In experience cloud following 3 components are available – Session, Session History and Connection report.

4.18.1 Add TeamViewer components to the experience cloud layout

1) In Salesforce, click on the gear icon on top right of the page and select “Setup”.
2) Load “All Sites” page.

3) Click on “Builder”.

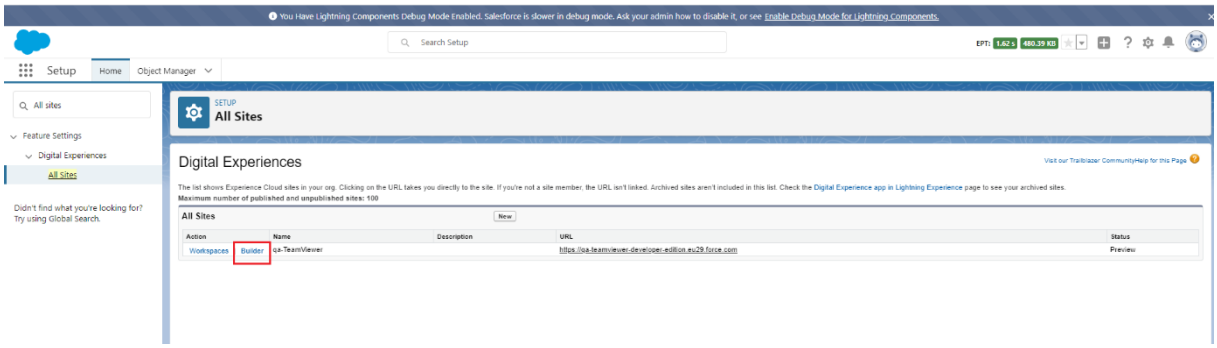


Figure 156

4) Click on “Home” picklist and select the object in which you want to add the components.

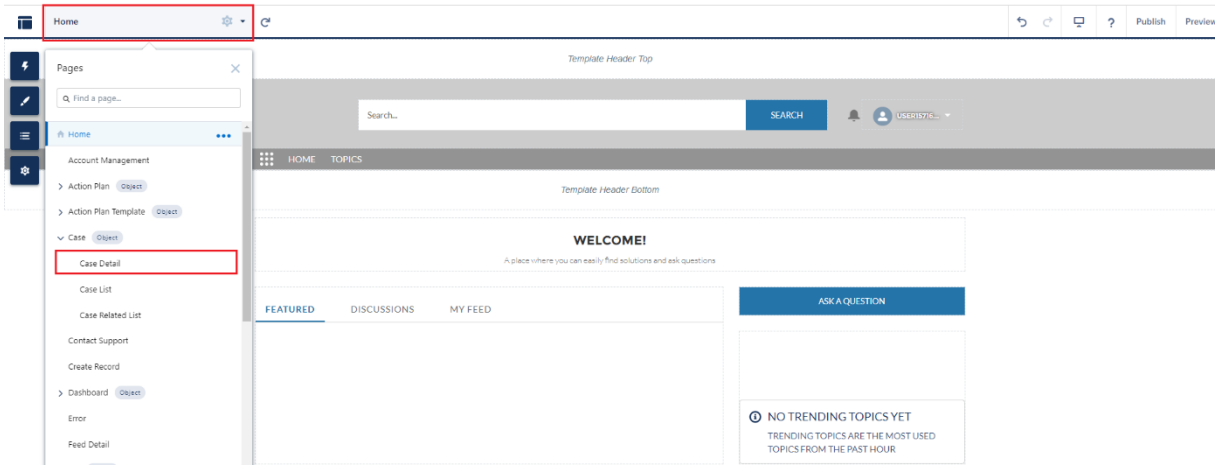


Figure 157

5) Click on the lighting icon.

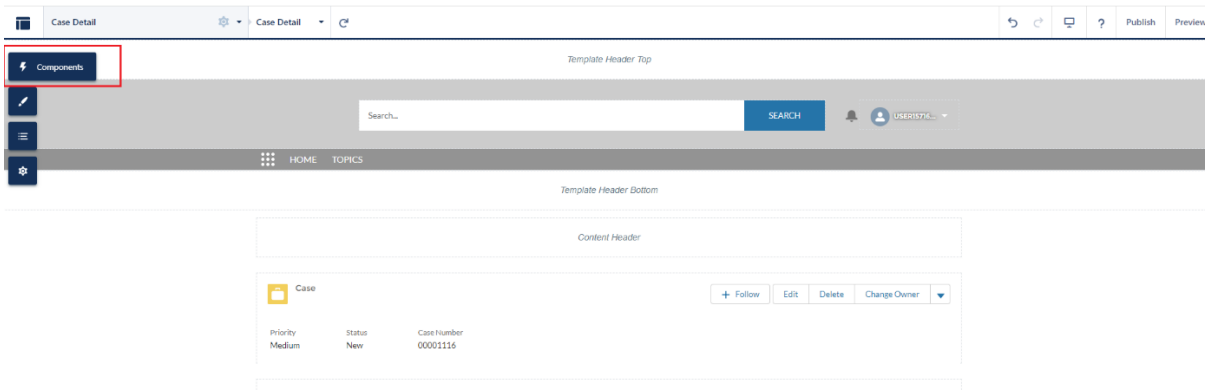


Figure 158

6) Scroll down to view the “Custom Components”.
7) Drag and drop each component to the detail section.

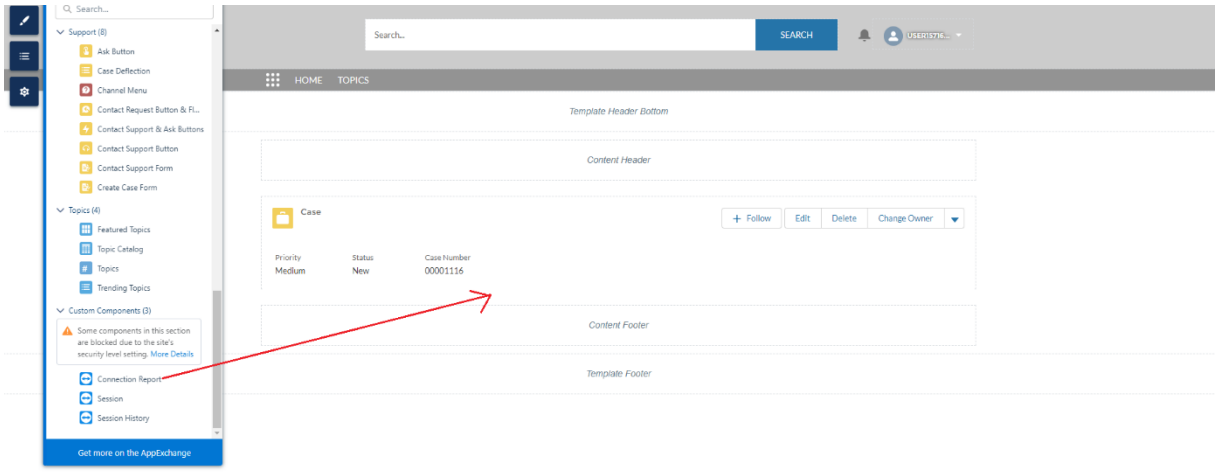


Figure 159

8) Select each component and add value in “Community Prefix” field.

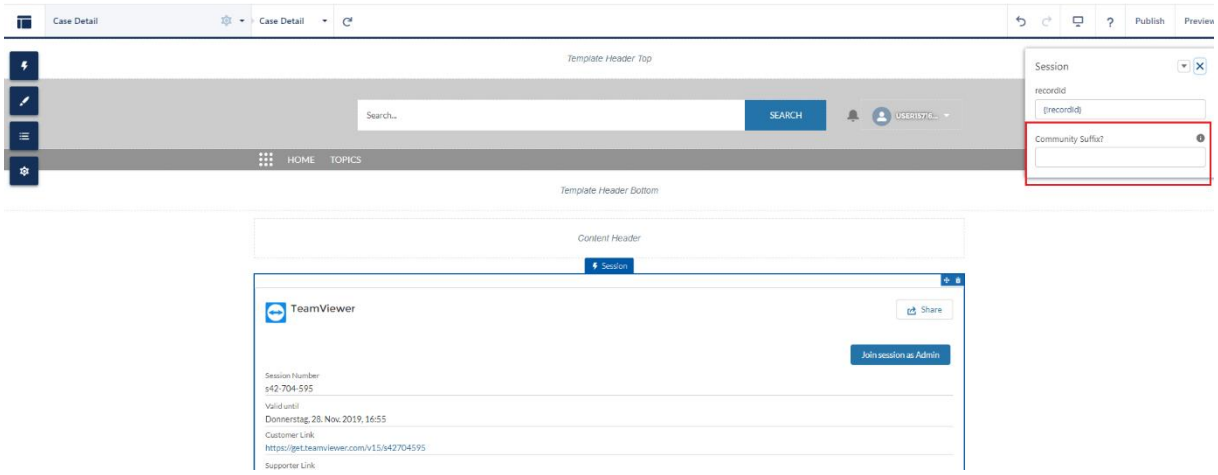


Figure 160

9) This need to be filled in case you indent to use it in a community which has URL suffix.

Note: To know the suffix, click on “Workspaces” in “All Sites” page -> Click on “Administration” -> Click on edit icon

10) After filling the values click on “Publish” button.

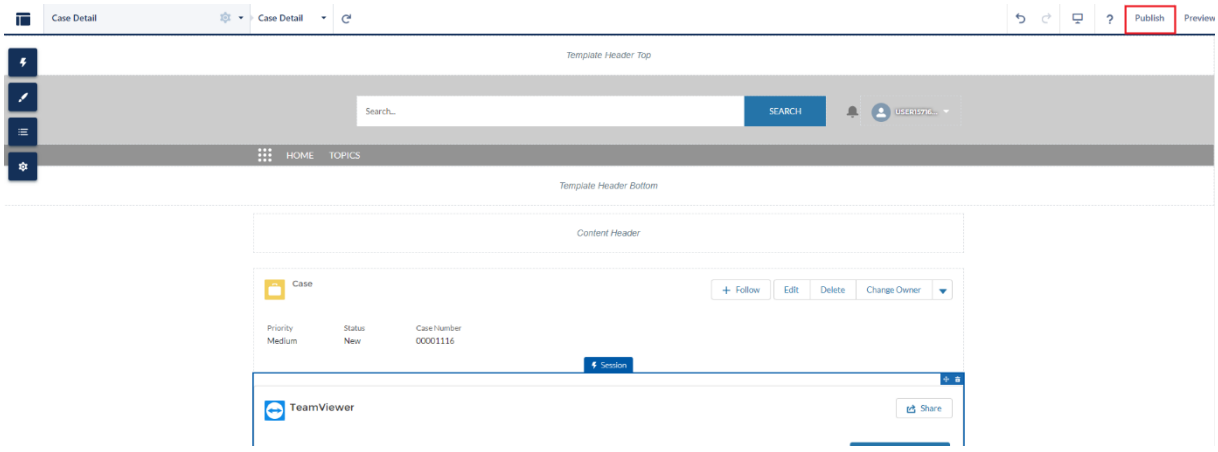


Figure 161

11) This will open a confirmation popup and click on the “Publish” button in the popup.

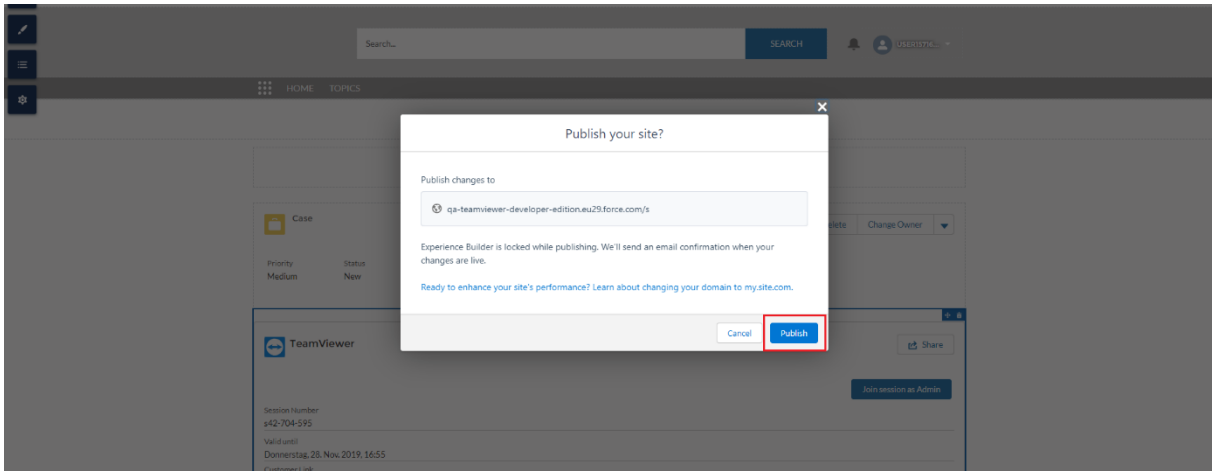


Figure 162

4.18.2 View the TeamViewer components in the experience cloud

Once the components published, to view the components in experience cloud.

1) Open the Experience cloud URL.
2) Search for the record to be displayed and select it.

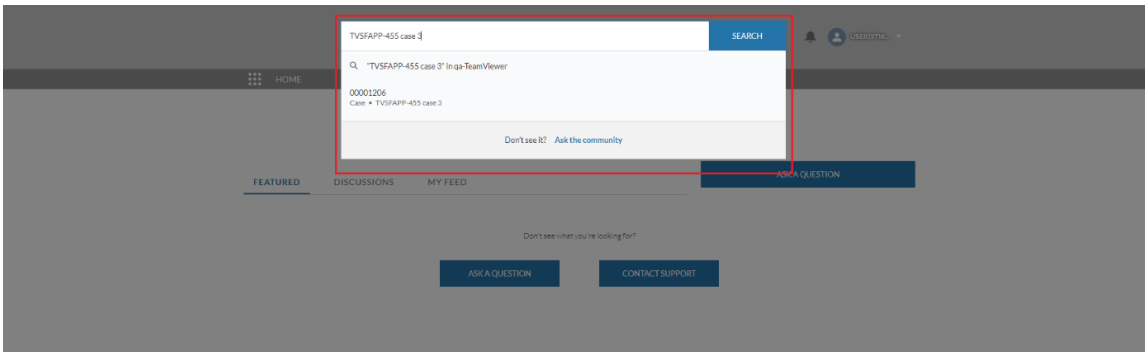


Figure 163

3) It will load the corresponding record.

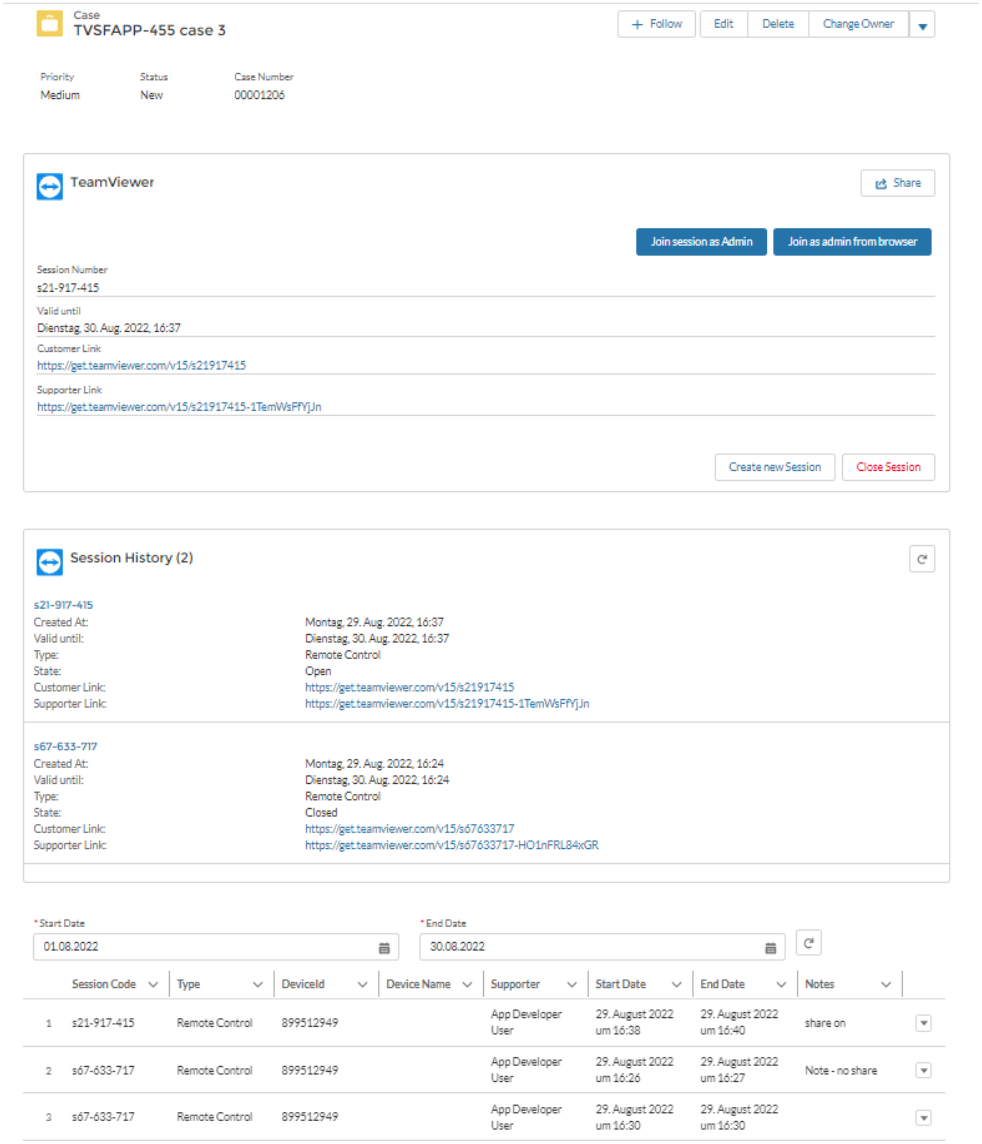


Figure 164

4.19 TeamViewer Session Insights

In Connection report, there is an option to view connection summary. This includes the Title, Summary, and Workflow Steps in table format as well.

1) Load Connection Report.

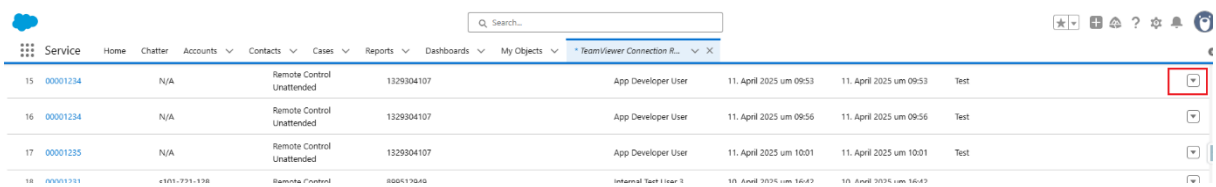


Figure 165

2) Click on the down arrow of a connection record.

3) Click on "View Session Insight".

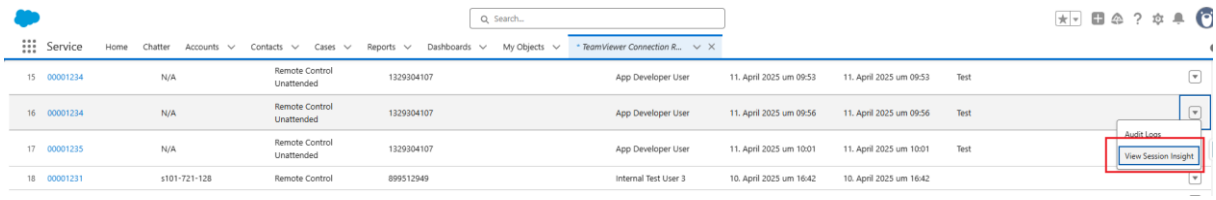


Figure 166

4) A modal dialog is displayed with connection summary.

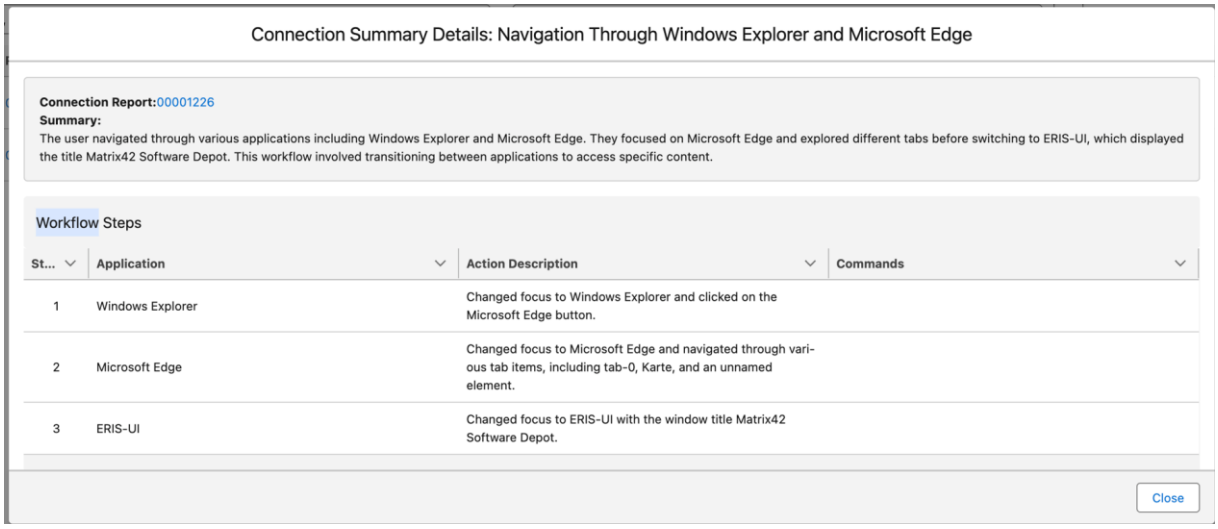


Figure 167

Note: Insights will be displayed only if the connection is made between managed devices. Summaries provided by the ai-summaries/session insights feature of a TeamViewer connection originating from a case is added to the case activity log.

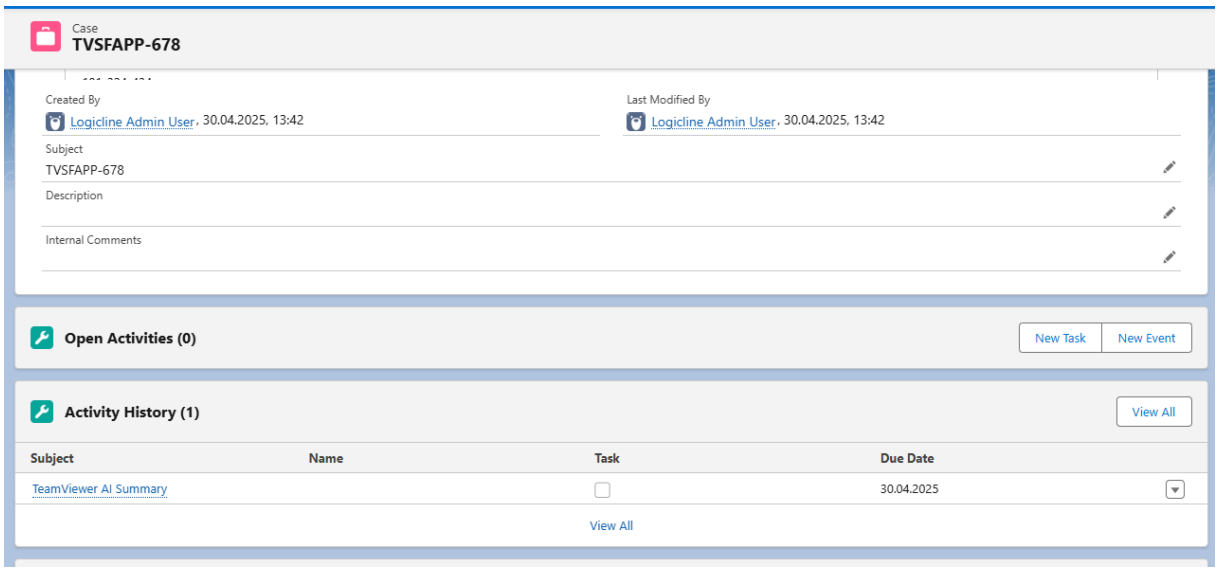


Figure 168