

Getting Started with Sales Anywhere for Salesforce.com

Sales Anywhere
Version 2.7



iAnywhere grants you permission to use this document for your own informational, educational, and other non-commercial purposes; provided that (1) you include this and all other copyright and proprietary notices in the document in all copies; (2) you do not attempt to "pass-off" the document as your own; and (3) you do not modify the document. You may not publish or distribute the document or any portion thereof without the express prior written consent of iAnywhere. iAnywhere Solutions, Inc. is a subsidiary of Sybase, Inc.

This document is not a commitment on the part of iAnywhere to do or refrain from any activity, and iAnywhere may change the content of this document at its sole discretion without notice. Except as otherwise provided in a written agreement between you and iAnywhere, this document is provided "as is", and iAnywhere assumes no liability for its use or any inaccuracies it may contain.

iAnywhere, iAnywhere Solutions, Sybase, SYBASE (logo), AAOSA, AccelaTrade, Adaptive Agent Oriented Software Architecture, Adaptive Agent Software Architecture Platform, Adaptive Agent Software Architecture Program, Adaptive Server, Adaptive Server Anywhere, Adaptive Server Enterprise, Adaptive Server IQ, Afaria, Answers Anywhere, Anywhere Studio, AvantGo, AvantGo Mobile Marketing Channel, Mobile Pharma, Mobile Sales, Pylon, Pylon Application Server, Pylon Conduit, Pylon PIM Server, Pylon Pro, DataWindow, DirectConnect, Embedded SQL, InfoMaker, jConnect for JDBC, M-Business Anywhere, M-Business Server, Open Client, Open Client/Server, Open Client/Server Interfaces, Open ClientConnect, Open Gateway, Open Server, Open ServerConnect, PhysicalArchitect, Pocket PowerBuilder, PocketBuilder, PowerBuilder, PowerDesigner, QAnywhere, Replication Agent, Replication Server, Replication Server Manager, RFID Anywhere, SQL Anywhere, SQL Anywhere Studio, SQL Remote, SQL Server, Sybase Central, Transact-SQL, UltraLite, UltraLite.NET, Watcom, Watcom SQL, Watcom SQL Server, XcelleNet (and design) are trademarks of Sybase, Inc. or its subsidiaries.

All other trademarks are property of their respective owners.

For a comprehensive list of Sybase trademarks, see <http://www.iAnywhere.com/trademarks>.

Written and designed at iAnywhere Solutions, Inc.

One Sybase Drive

Dublin, CA 94568

<http://www.iAnywhere.com>

Table of Contents

CHAPTER 1. About this guide	5
Focus of this guide	6
Conventions	7
On-device screenshots.	7
Contacting iAnywhere Solutions	8
Technical support	8
Application development — customizing iAnywhere software	9
Product information	9
Feedback on documentation.	9
CHAPTER 2. Using Sales Anywhere for Salesforce.com	11
Installation and setup	12
System requirements	12
Installing Sales Anywhere for Salesforce.com	12
Starting Sales Anywhere for Salesforce.com on your mobile device	13
Configuring the Salesforce.com Offline Briefcase	17
Briefcase content categories	17
Briefcase accounts options	17
Setting your Briefcase accounts options	18
Manually selecting accounts to include offline	18
Synchronizing changes to your Offline Briefcase	19
Working with Sales Anywhere on your device.	20
Accessing Salesforce.com information	20
Salesforce.com customization support	21
Searching for records	21
Personalizing List Pages	24
Accessing Recent Items	25
Initiating phone calls and emails	27
Viewing, Creating, and Editing Records.	28
Viewing records	28
Creating records from a List Page and Calendar pages.	31
Creating records from within other records	31
Editing records	33
Synchronizing your mobile device	36

Resolving conflicts	37
Understanding time zone processing	38
Index	41

CHAPTER 1. **About this guide**

- “Focus of this guide” (page 6)
- “Conventions” (page 7)
- “Contacting iAnywhere Solutions” (page 8)

Focus of this guide

This guide provides instructions for installing and configuring Sales Anywhere for Salesforce.com on your mobile device, and then synchronizing Salesforce.com content between your desktop and your mobile device.

Conventions

The following table lists the formatting conventions used throughout this guide.

Table 1-1
Formatting
conventions

Item	Treatment	Example
Name of publications	Italic	<i>Getting Started with Sales Anywhere for Salesforce.com, Version 2.7</i>
User interface items: buttons, links, keywords	Bold	Click the Reset button.
Multi-level menu selections	Bold with vertical hash	Select Start Settings Control Panel .
Text you type in	Fixed-width font	Type Admin in this field.
Text displayed in a file or on the screen	Fixed-width font	The screen reads: Backup Complete
Variables	Angle brackets	<servername>
Keyboard command key	Angle brackets	<Enter>
File names	Italic	<i>.../conf/sync.conf</i>

On-device screenshots

In most cases, the details of screens on Windows Mobile Pocket PC and Palm devices is so similar that a screenshot from either platform works to orient user looking at the other platform. Therefore, typically a single screenshot of the Windows Mobile Pocket PC screen is provided to serve users both on that platform and on Palm.

Whenever Windows Mobile Pocket PC and Palm screen details differ in important ways, separate screenshots are provided for Palm.

Contacting iAnywhere Solutions

Technical support

If you need assistance using iAnywhere software, in North America, please contact iAnywhere Technical Support by calling 1-800-8SYBASE (800-879-2273) and then selecting option 3. You can call Monday through Friday (except major US holidays) between 9:00 a.m. and 9:00 p.m. Eastern time. Services will be provided in accordance with your support agreement.

Outside of North America, for your local support number and hours, please see:

<http://www.sybase.com/contactus/support>

Registering as a Named Contact

Calling the 800-number during business hours should always work to get you technical support — a Customer Number is created for you as soon as your purchase is completed. You will find it faster and easier to get technical support, by phone or online, if you have registered as a Named Contact.

When you purchase an iAnywhere product, a *Sybase Technical Support Contact Form* will automatically be emailed to you within 7-10 days. If your company should need to add another Named Contact, or change the one initially registered, call the Technical Support 800-number and request a *Sybase Technical Support Contact Change Form*.

The *Sybase Technical Support Contact Form* will contain your Customer Number, with spaces for you to provide an email address and other identifying information for the Named Contact for your product. Fill in the requested information and fax the form back to the phone number indicated.

When your fax is received, an email will be sent to you, providing your Technical Contact ID number. You can then use this number to speed up the process when you call for technical support, and to access technical support online.

Using the Sybase Online Support Services

A major benefit of using the Sybase Online Support Services is 24x7 availability. Online support also allows you to look up and review past and current support issues.

When you register as a Named Contact, the email sent to you with your Technical Contact ID number also contains instructions for registering and using the Sybase Online Support Services. Follow these instructions to register as a first-time user, or to update your account with information for the new product you have purchased.

If you have any trouble registering for the Sybase Online Support Services, you can of course call iAnywhere Technical Support for assistance!

Application development — customizing iAnywhere software

If you need help with customizing iAnywhere software to better serve your enterprise, please contact iAnywhere Solutions Professional Services at contact_us@ianywhere.com.

Product information

If you need information about other iAnywhere products for your enterprise, please contact iAnywhere Workforce Sales at contact_us@ianywhere.com.

Feedback on documentation

If you have questions or suggestions about this document or other iAnywhere technical publications, please contact iAnywhere Technical Publications at iasdoc@ianywhere.com.

We would like to receive your opinions, suggestions, and feedback on this documentation. Although we do not reply to individual emails, we read all suggestions with interest and attempt to incorporate them in future releases.

CHAPTER 2. **Using Sales Anywhere for Salesforce.com**

- “Installation and setup” (page 12)
- “Configuring the Salesforce.com Offline Briefcase” (page 17)
- “Working with Sales Anywhere on your device” (page 20)
- “Viewing, Creating, and Editing Records” (page 28)
- “Synchronizing your mobile device” (page 36)

Installation and setup

System requirements

Windows Mobile Pocket PC and Palm OS

- On your PC: Windows 98, 2000, XP, or NT
- Windows Mobile 5 or Pocket PC/Pocket PC Phone 2003 or Palm OS 5.0 or later with 320x320 or higher screen resolution
- 1.5MB free memory on your mobile device, plus additional memory for data
- A desktop cradle to complete initial installation
- Integrated phone to take advantage of phone and email capabilities

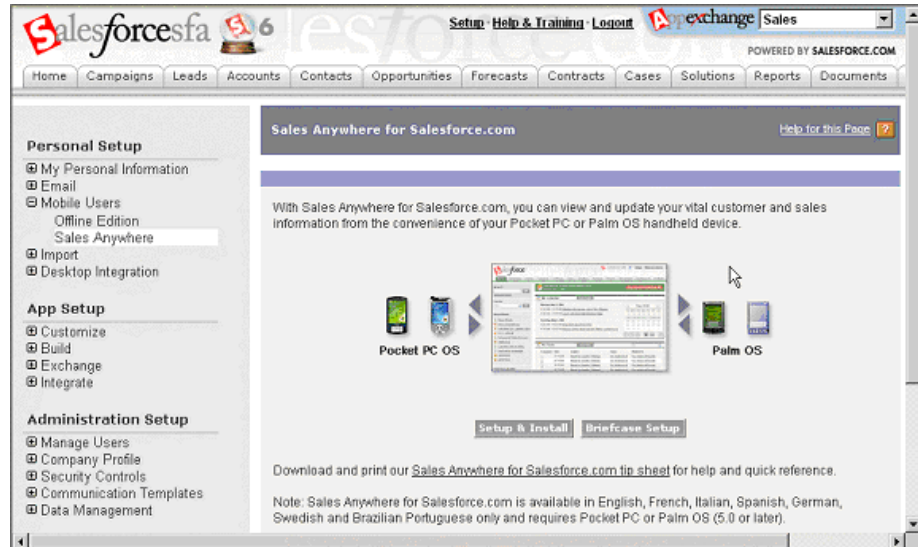
BlackBerry

- A RIM BlackBerry 7100, 7200, 7500, or 8700 series devices with 32 MB of memory
- BlackBerry OS 4.0 or later
- 4 MB of free memory plus additional memory for data
- Your BlackBerry device must be associated with a BlackBerry Enterprise Server (BES) with Mobile Data Service (MDS) enabled. Check with your BlackBerry administrator at your organization to confirm this requirement.

Installing Sales Anywhere for Salesforce.com

To get started with Sales Anywhere for Salesforce.com:

1. Open Salesforce on your desktop.
2. In the left navigation panel, click the **Setup** link at the top, then select **Personal Setup|Mobile Users|Sales Anywhere**.



3. Click the **Setup & Install** button.
4. Follow the setup wizard prompts to complete the installation.

Starting Sales Anywhere for Salesforce.com on your mobile device

1. Start your mobile device.
2. Start Salesforce:
 - **On Windows Mobile Pocket PC**, select **Start|Programs|Salesforce**.
 - **On Palm**, select **Applications|Salesforce**.

- **Or, on Windows Mobile Pocket PC or Palm, select the Salesforce.com icon from the programs/applications screen.**



- **On BlackBerry, select the Sales Anywhere for Salesforce.com icon from the home screen.**

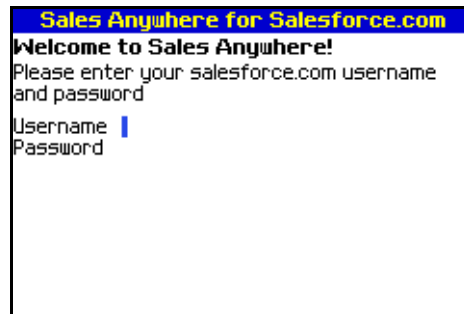


3. Enter your Salesforce login and password, and tap **Login**.

On Windows Mobile Pocket PC and Palm, tap the **Login** button:



On Blackberry, select **Log In** from the menu:



4. **For Palm and Windows Mobile Pocket PC**, place your PDA in its cradle to download your Briefcase data to your mobile device.

For BlackBerry, no additional action is required. Your data will be automatically downloaded to your mobile device.

Configuring the Salesforce.com Offline Briefcase

The Salesforce.com Offline Briefcase determines the data that is available through Sales Anywhere on your mobile device.

Briefcase content categories

The Briefcase contents fall into two categories:

- **Your Planner:** All of your contacts and activities
 - All of your contacts, including your private contacts
 - Your tasks and events, according to the guidelines that follow
 - Events dated this month, the past 2 months, or up to 2 years ahead
 - All of your open tasks up to 2 years in the future
 - Closed tasks with due dates this month, the past 2 months, or up to 2 years ahead
 - Tasks with blank due dates created or modified this month or within the past 2 months
- **Your Set of Accounts:** Accounts selected based on one of the four options below. Each of these options includes:
 - All contacts associated with the downloaded accounts.
 - All opportunities associated with the downloaded accounts.
 - Activities related to the downloaded accounts within the same date ranges as for the tasks you own; see date range guidelines above.

Briefcase accounts options

You may choose any of the following options to control the accounts for which data is stored in your Briefcase:

- **Option 1: Only manually selected accounts**

Includes only those accounts selected using the **Include Offline** button.

Note

Although this option always appears and can be selected, it is only functional for “active offline users.” If you are not an “active offline user” and you select this option, you will *not* be able to manually select accounts.

- **Option 2: Opportunity-based briefcase**

Includes those accounts associated with opportunities you own, or where you are on the sales team, that are either open or have a close date in the current month, the past 2 months or up to 24 months in the future.

■ **Option 3: Activity-based briefcase**

Includes accounts associated with your activities that meet these guidelines:

- Events dated this month, the past two months, or up to 24 months in the future.
- All open tasks up to 24 months in the future.
- Closed tasks with a due date this month, the past two months, or up to 24 months in the future.
- Closed tasks with a blank due date that were created or modified this month or within the past two months.

■ **Option 4: All my accounts**

Includes all accounts that you own or those that include you on the account team and the opportunities that you own or where you are on the sales team, including the accounts for those opportunities regardless of owner.

■ **Additional Selected Accounts**

Select up to 100 additional accounts and related data to include offline. The related data that is included with the selected accounts is determined by the guidelines listed under "Your Set of Accounts" above

Setting your Briefcase accounts options

The set of accounts included in your Briefcase is controlled by the Briefcase settings.

1. Open Salesforce on your desktop.
2. In the left navigation panel, click the **Setup** link at the top, then select **Personal Setup**|**Mobile Users**|**Sales Anywhere**.
3. Next to **Briefcase Settings**, click **Edit** .
4. Choose a new setting for your set of accounts.
For a description of settings, see "Briefcase accounts options" (page 17).
5. Click **Save**.

Manually selecting accounts to include offline

Note

If you chose **Option 1: Only manually selected accounts** in "Setting your Briefcase accounts options" (page 18), you can use these instructions to manually add accounts to, and remove accounts from your Briefcase.

Manually adding offline accounts

1. In Salesforce on your desktop, view the account online.
2. Click the **Include Offline** button.

The account and related data are included at the next synchronization.

Manually removing offline accounts

1. Open Salesforce on your desktop.
2. In the left navigation panel, click the **Setup** link at the top, then select **Personal Setup|Mobile Users|Sales Anywhere**.
3. Click **Briefcase Setup**.
4. Select the checkbox next to the account to remove.
5. Click **Remove from Briefcase**.

The account and related data are removed during the next synchronization.

Synchronizing changes to your Offline Briefcase

An account created offline is uploaded to Salesforce during synchronization. However, the account must meet your Briefcase criteria or the account will be removed from your Briefcase during the synchronization.

Working with Sales Anywhere on your device

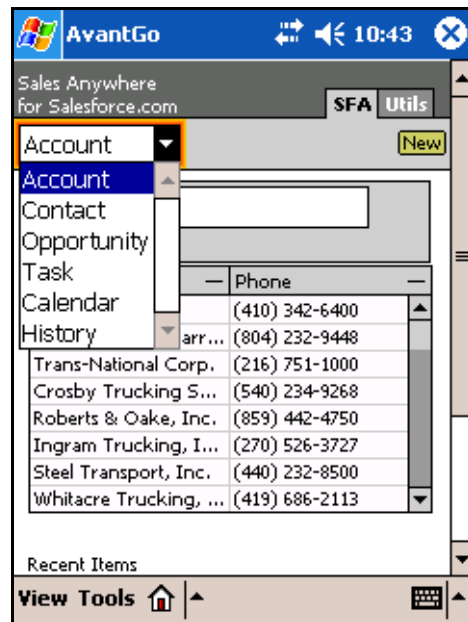
Accessing Salesforce.com information

Sales Anywhere gives you access to the following objects in your Sales Anywhere for Salesforce.com Briefcase:

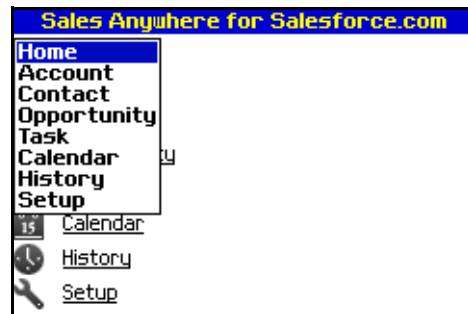
- Accounts
- Contacts
- Opportunities
- Tasks
- Events.

The main Sales Anywhere for Salesforce.com drop-down list contains options that correspond to these desktop Salesforce tab names.

Windows Mobile Pocket PC and Palm



Blackberry



Salesforce.com customization support

Sales Anywhere supports the following Salesforce.com customizations:

- Custom field labels
- Custom fields
- Custom page layouts and record type
- Renamed tabs
- Permissions and sharing

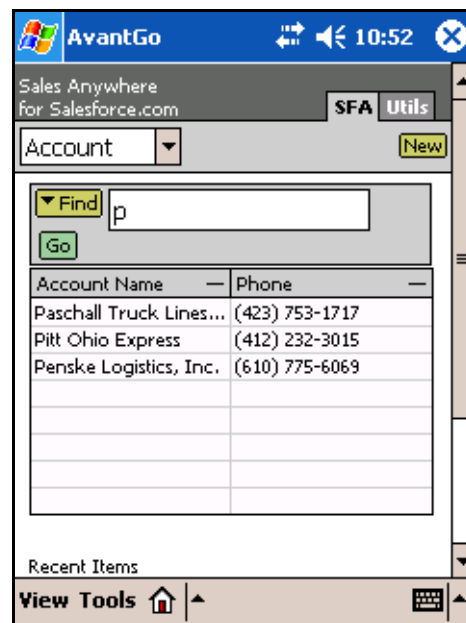
All of these desktop Salesforce.com customizations are automatically updated in the Sales Anywhere application on your mobile device during synchronization.

Searching for records

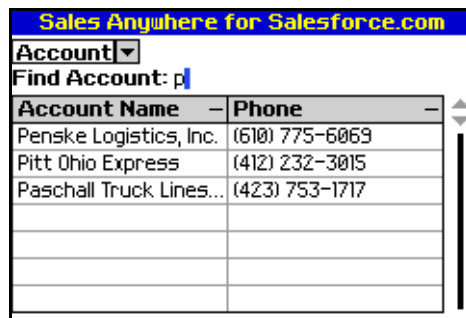
Each List Page provides “Find” functionality to conveniently and quickly locate a specific Account, Contact, Opportunity, or Task record.

1. Navigate to a List Page.
2. In the **Find** field, enter the search criteria.
3. Tap the **Go** button to search on the default column in the List Page.

Windows Mobile Pocket PC and Palm



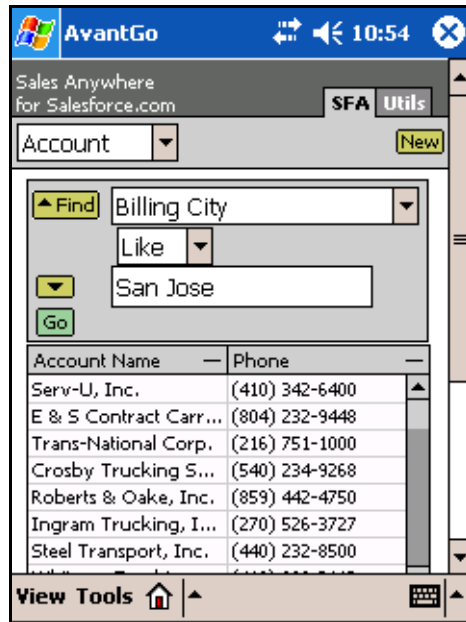
Blackberry



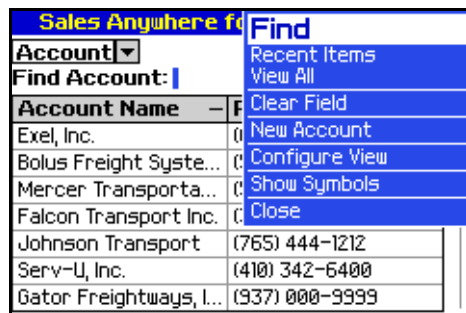
Advanced Find functionality

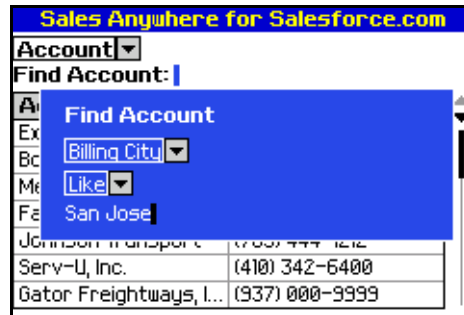
Users can also search on any field within an object through advanced Find functionality.

On Palm and Windows Mobile Pocket PC, tap the **Find** button in the Find dialog to access this function:



On BlackBerry, from the List Page menu select **Find**:

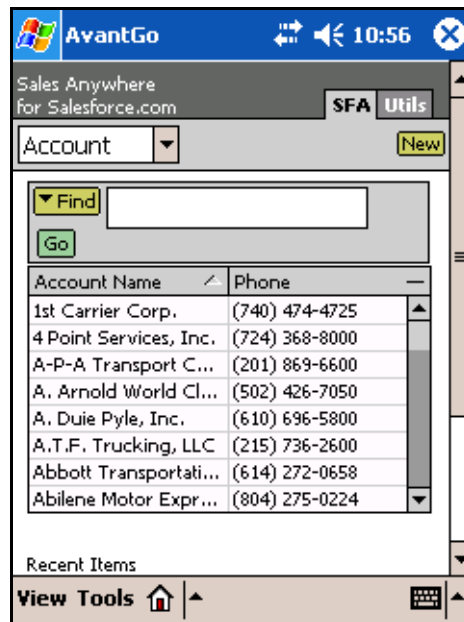




Sorting List Page views

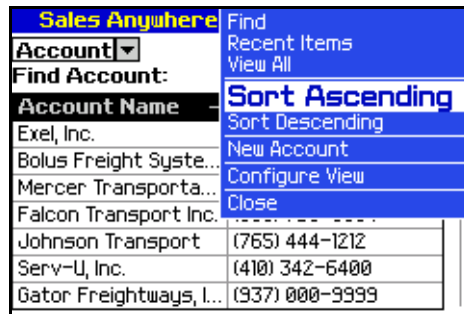
List Page views can be sorted by any column that appears on the list page.

On Windows Mobile Pocket PC and Palm, simply tap the heading of the column that you want to sort by:



On BlackBerry, to sort the data in a List Page view:

1. Put the focus on a column heading using the thumb wheel.
2. Select **Sort Ascending** or **Sort Descending** from the menu.

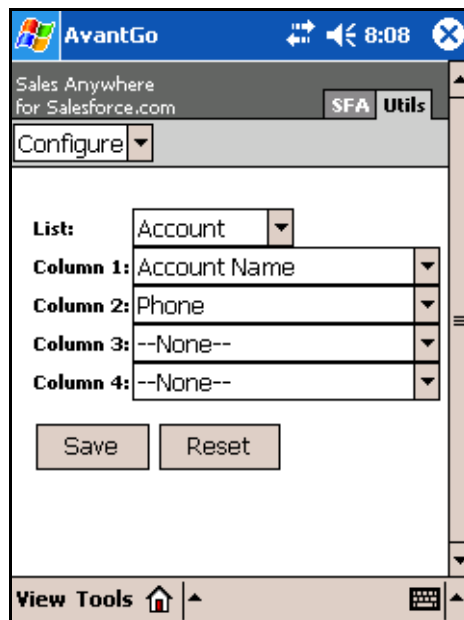


Personalizing List Pages

Users can personalize the columns that appear on each List Page.

Windows Mobile Pocket PC or Palm

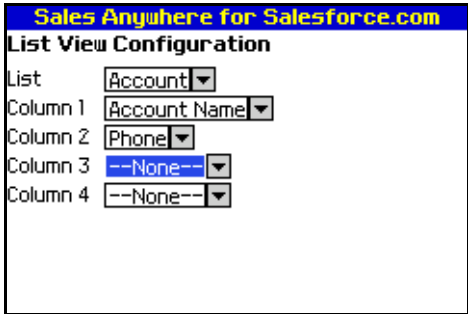
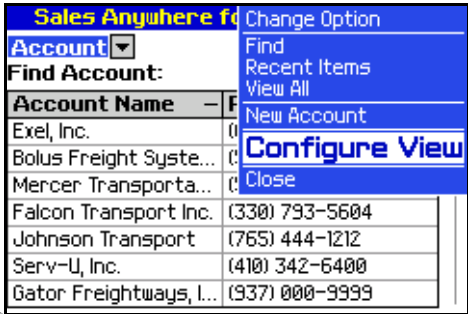
1. Navigate to the **Utils** tab.
2. From the drop-down list at the top left, select **Configure**.
3. Set **List** to the list page to be personalized.
4. In **Column 1** through **Column 4**, select the information that you want to be displayed on each list page.



On Windows Mobile Pocket PC and Palm, users can also adjust the width of each column by simply dragging the column separator in the column header.

Blackberry

From any List Page menu, select **Configure View**.

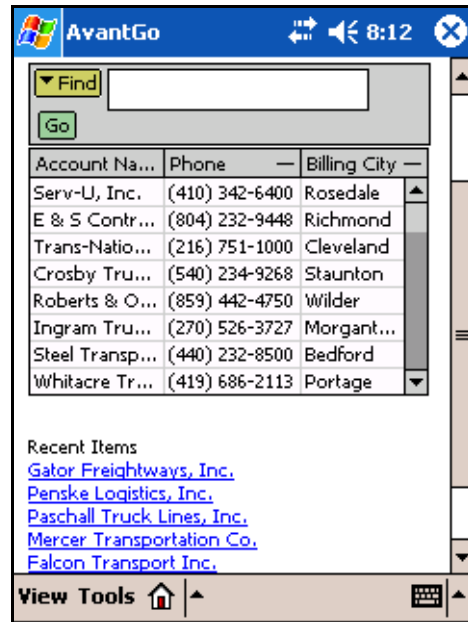


Accessing Recent Items

Sales Anywhere keeps track of recently accessed records for each List Page.

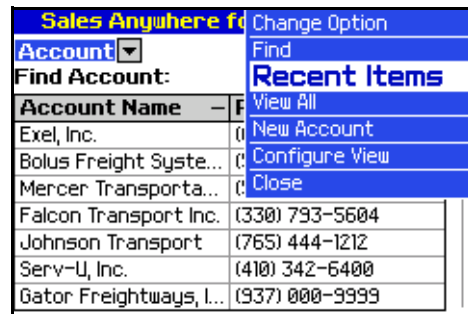
Windows Mobile Pocket PC and Palm OS

Access Recent Items by scrolling to the bottom of the List Page.



BlackBerry

Access recent items by selecting **Recent Items** from the List Page menu.

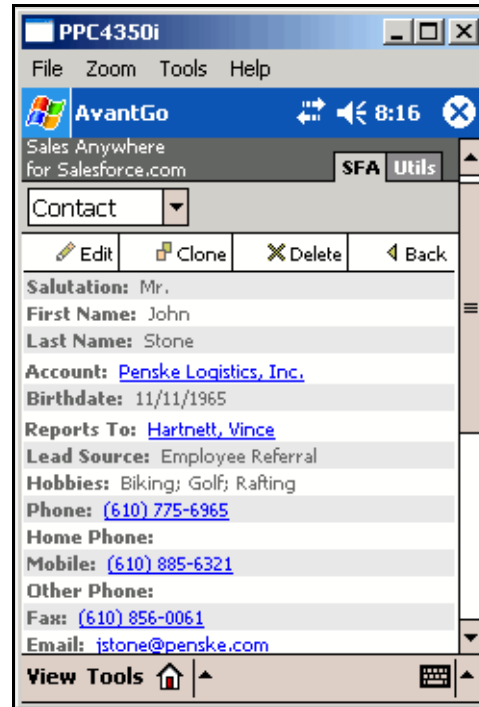


Initiating phone calls and emails

Users can initiate email from within Sales Anywhere. With a phone enabled device, users can also initiate phone calls.

Windows Mobile Pocket PC and Palm OS

Tap on any phone number or email address to activate this function.



Blackberry

Access this feature through the menu on any Detail Page — from the menu, select the **Call...** or **e-mail...** option that you want to use. Sales Anywhere will launch the appropriate email client or phone dialer. Sales Anywhere will also log a task with a completed status for the account or contact from which the message or phone conversation was initiated.

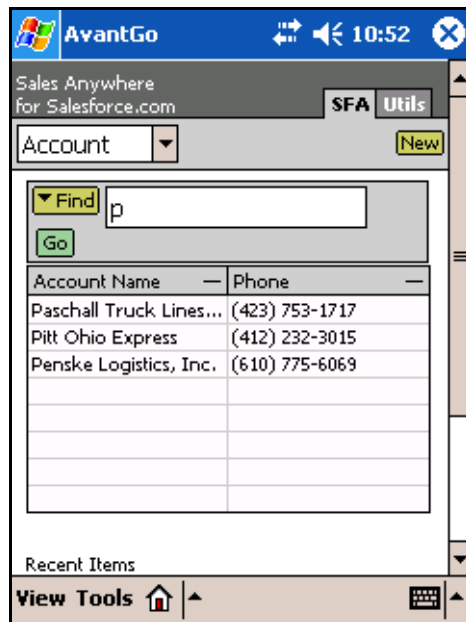


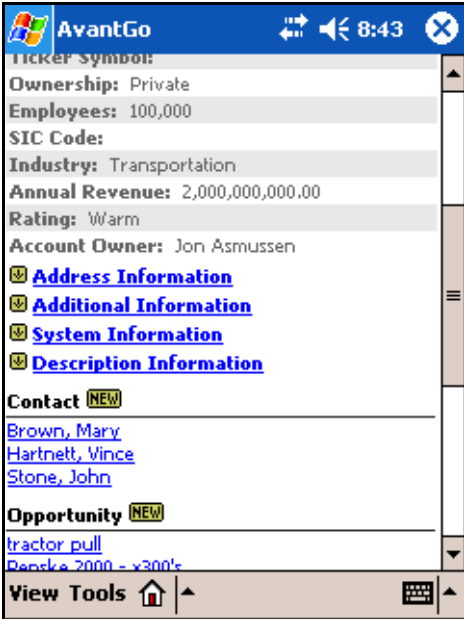
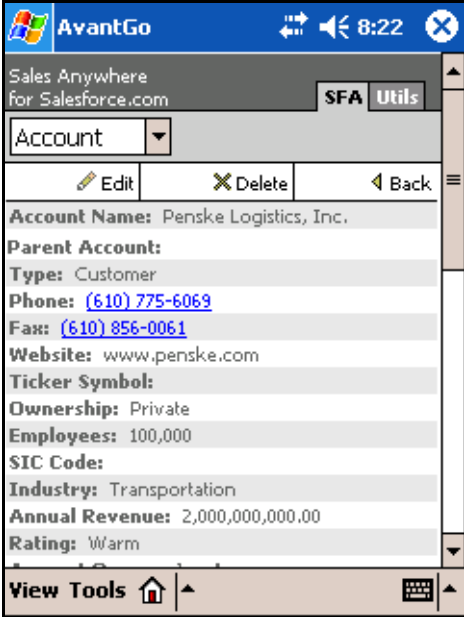
Viewing, Creating, and Editing Records

Viewing records

Each Salesforce object — Account, Contact, Opportunity and Tasks — has a List Page. In addition, Salesforce Events will appear in the Calendar screens. Select any record within a List Page or Calendar pages to see the selected record's contents as well as any related records for the selected record.

Windows Mobile Pocket PC or Palm





Blackberry

Sales Anywhere for Salesforce.com

Account ▾

Find Account: p

Account Name	Phone
Penske Logistics, Inc.	(610) 775-6069
Pitt Ohio Express	(412) 232-3015
Paschall Truck Lines...	(423) 753-1717

Sales Anywhere for Salesforce.com

Account ▾

Penske Logistics, Inc.

Account Name: Penske Logistics, Inc.

Parent Account: |

Type: Customer

Phone: (610) 775-6069

Fax: (610) 856-0061

Website: www.penske.com

Ticker Symbol:

Ownership: Private

Employees: 100,000

Sales Anywhere for Salesforce.com

Account Owner: Jon Asmussen

[Address Information](#)

[Additional Information](#)

[System Information](#)

[Description Information](#)

Related

[Contact...](#)

[Opportunity...](#)

[Task...](#)

Sales Anywhere for Salesforce.com

account

Penske Logistics, Inc. Contact

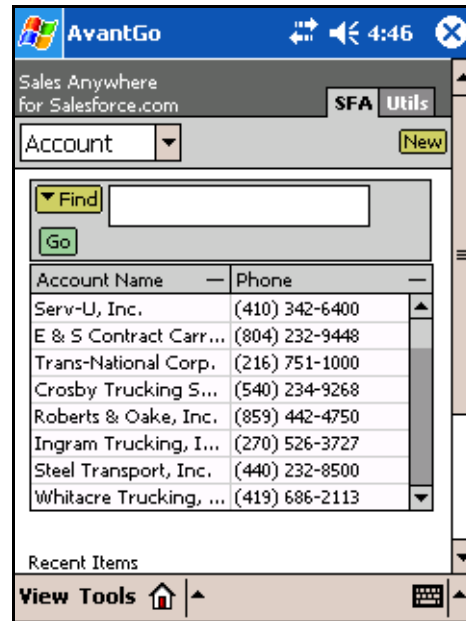
Name
Stone, John
Hartnett, Vince
Brown, Mary

Creating records from a List Page and Calendar pages

New records can be created from any List Page or from Calendar pages.

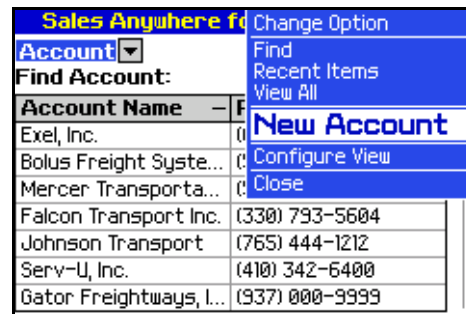
Windows Mobile Pocket PC or Palm OS

Select the **New** button from a List Page.



Blackberry

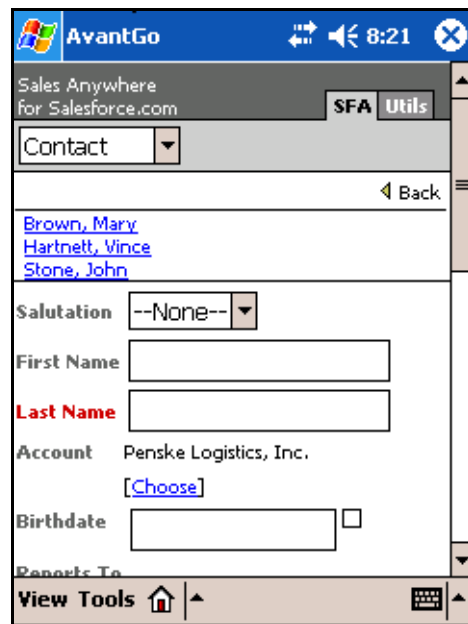
Select **New** from the List Page menu.



Creating records from within other records

New records can also be created from within other records. Users should employ this option when possible to create new records, because it will pre-populate fields such as Account Name and Contact Name. For example, creating a task from a contact Detail Page will automatically relate the newly created task to the selected contact and its parent account. Red field labels designate required fields.

Windows Mobile Pocket PC and Palm



Blackberry

Sal	Change Option
Acco	Edit
Pensl	Delete
Acco	New Contact
Parer	New Opportunity
Type:	New Task
Phone	New Event
Fax: (Call Phone (610) 775-6069
Webs	Call Fax (610) 856-0061
Ticke	Close
Ownership: Private	
Employees: 100,000	

Sales Anywhere for Salesforce.com	
Contact	▼
Salutation:	▼ --None-- ▼
First Name:	
Last Name:	
Account:	Penske Logistics, Inc.
Birthdate:	Dec 2, 292269055
Reports To:	
Lead Source:	▼ --None-- ▼
Hobbies:	
Phone:	
Home Phone:	▼

Editing records

Records can be edited by selecting the edit function from a Detail View Page.

Windows Mobile Pocket PC and Palm

An **Edit** button is displayed at the top of each Detail View Page if the user has update permissions. Red field labels designate required fields.



Blackberry

Sal	Change Option
Acco	Edit
Pensl	Delete
Acco	New Contact
Parer	New Opportunity
Type:	New Task
Phone	New Event
Fax: (Call Phone (610) 775-6069
Webs	Call Fax (610) 856-0061
Ticke	Close
Ownership: Private	
Employees: 100,000	

Sales Anywhere for Salesforce.com	
Account	<input type="text" value="▼"/>
Penske Logistics, Inc.	
Account Name: Penske Logistics, Inc.	
Parent Account:	
Type:	<input style="border: 1px solid black;" type="text" value="Customer"/>
Phone:	(610) 775-6069
Fax:	(610) 856-0061
Website:	www.penske.com
Ticker Symbol:	
Ownership:	<input style="border: 1px solid black;" type="text" value="Private"/>
Employees:	100,000 <input type="text" value="▼"/>

Synchronizing your mobile device

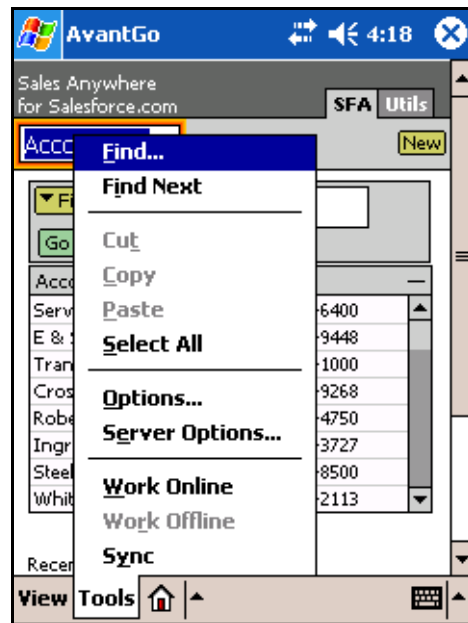
Windows Mobile Pocket PC and Palm overview

Synchronize wirelessly or through your desktop cradle to ensure that you have the latest information, online and in your Briefcase.

- During synchronization, all new or modified offline records are uploaded to Salesforce. Your Briefcase is also updated with all records modified or created online since the last synchronization, if they fit your Briefcase criteria.
- Your Briefcase is updated the first time you log in or if your Briefcase is empty.
- After synchronizing, check your history to resolve any data conflicts.

Windows Mobile Pocket PC

To synchronize wirelessly or through your cradle with a Windows Mobile Pocket PC device, select **Tools|Sync**.



Palm

To synchronize wirelessly with a Palm OS device, select **Channels|Sync**. To synchronize through your PC, push the HotSync button on your Palm cradle.

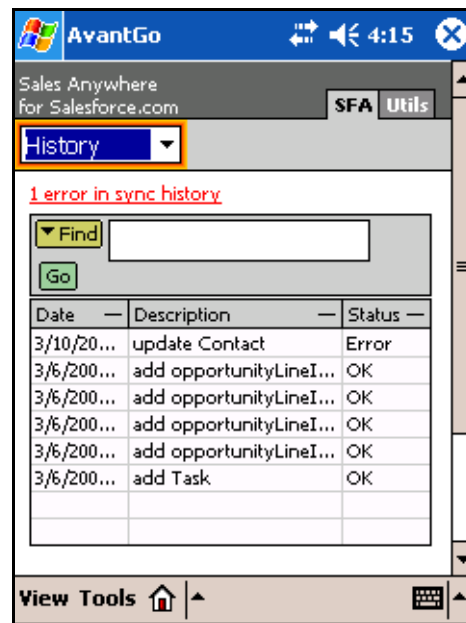
RIM BlackBerry

Sales Anywhere for Salesforce.com on BlackBerry devices automatically keeps the data between your mobile device and Salesforce.com synchronized. Users do not need to take any action.

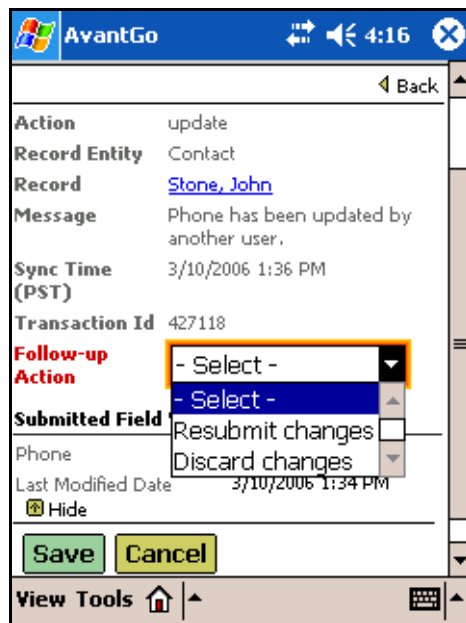
Resolving conflicts

The History List Page provides a record of all Salesforce.com transactions — records that have been added, deleted, or changed from Sales Anywhere. The status of each record listed can have one of two values:

- **OK** — successfully completed transaction.
- **Error** — processing failure or conflict.



In the case of an **Error** status, review the detail log information, choose to keep the offline record (**Reapply**) or the online record (**Discard**), or create a new online record using your offline data. Windows Mobile Pocket PC and Palm users synchronize again to upload the records modified during the resolution process. Blackberry users do not need to take any further action.



Understanding time zone processing

- The created and last modified dates for records created or modified offline show your PDA's timestamp.
- When you synchronize the records to Salesforce, the time of the synchronization is inserted as the record's modified or created date.
- New offline activities are created with the time you enter and are marked with the time zone of your PDA.

- When the offline activities are synchronized to Salesforce, the activity times are converted to the time zone set in your Salesforce personal information.

Index

A

- accessing Recent Items 25
- accessing Salesforce.com information 20
- accounts options
 - description 17
 - setting 18
- active offline user status, necessary to manually select
 - Briefcase accounts 17
- application development, getting help from iAnywhere
 - Professional Services 9

B

- Briefcase
 - accounts options, description 17
 - accounts options, setting 18
 - active offline user status necessary to manually select
 - accounts 17
 - content categories 17
 - synchronizing changes 19

C

- Calendar Page, creating records from 31
- configuring Sales Anywhere for Salesforce.com 17
- conflicts, resolving 37
- contacting iAnywhere Solutions 8
- conventions, formatting 7
- creating records
 - from a List Page and Calendar pages 31
 - from within other records 31

D

- Detail Pages 27, 31
- documentation, providing feedback on 9

E

- editing records 33
- emails, initiating 27

F

- formatting conventions 7

I

- iAnywhere Professional Services 9
- iAnywhere Solutions, contacting 8
- initiating phone calls and emails 27
- installing Sales Anywhere for Salesforce.com on your
 - mobile device 12

L

- List Pages
 - creating records from 31
 - personalizing 24
 - sorting views 23

M

- mobile device
 - installing Sales Anywhere for Salesforce.com 12
 - synchronizing 36

O

- Offline Briefcase, *see* Briefcase

P

- personalizing List Pages 24
- phone calls, initiating 27

product information, obtaining 9

R

Recent Items, accessing 25

records

 creating from a List Page and Calendar pages 31

 creating from within other records 31

 editing 33

 viewing 28

resolving conflicts 37

S

Salesforce.com customization support 21

Salesforce.com Offline Briefcase, *see* Briefcase

searching for records 21

sorting List Page views 23

starting Sales Anywhere for Salesforce.com on your

 mobile device 13

Sybase Online Support Services 8

synchronizing your mobile device 36

 resolving conflicts 37

system requirements 12

T

technical support, contacting 8

time zone processing 38

V

viewing records 28