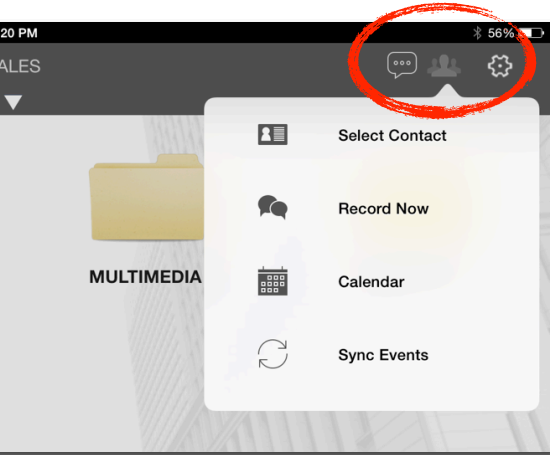# Salesforce Integration

This guide will show you the basics of our Salesforce integration. Contact us if you would like to schedule a more comprehensive online training with your team leader.
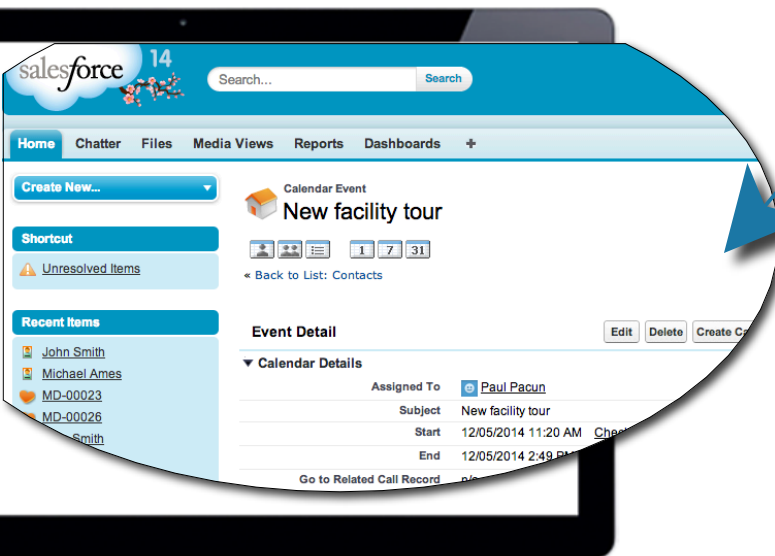
Once Salesforce has been enabled in your vablet account, then device users will see the people icon appear in the upper right corner of the toolbar. Tap this icon and choose one of three ways to record a meeting:
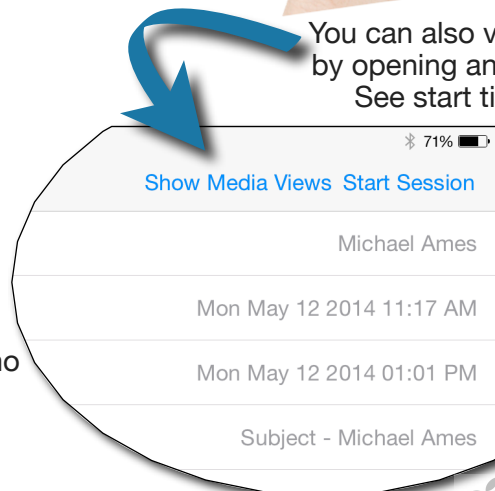
Recording an Event

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

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

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

You can also view details of past events, by opening an event from your calendar. See start time and end time, meeting details and media views.

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

iOS | Windows 8

All Day Productivity

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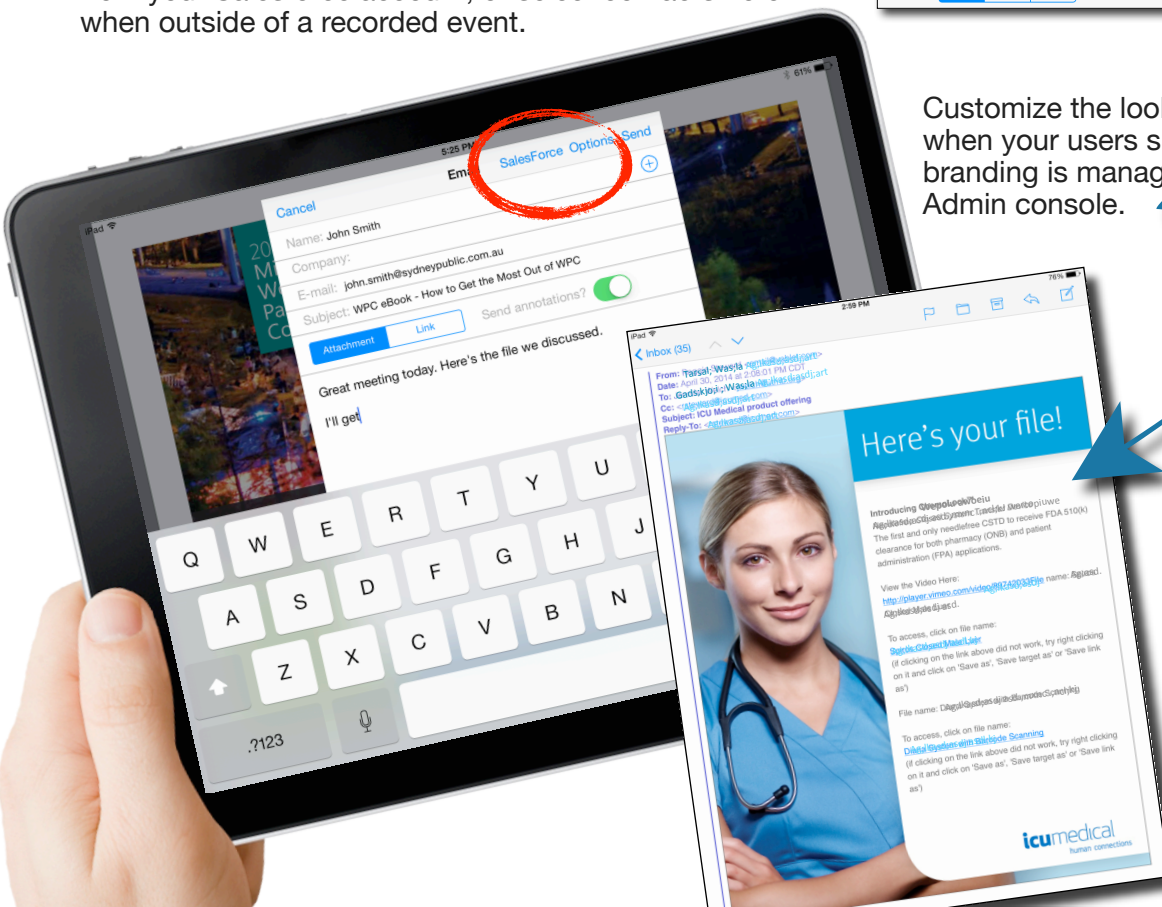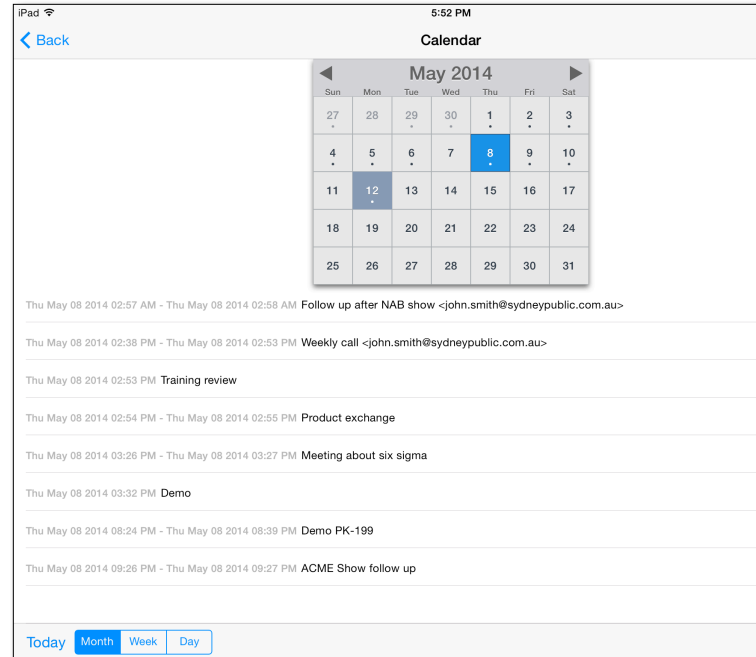
View and Edit Calendar

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

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

Emailing and Lead Gen

If the file has been authorized for sharing, tap on the file while it's open and file options will appear at the bottom of your screen. Tap the email icon and a simple email form will appear.

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

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

Online or Offline

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