



GIVING USERS ACCESS TO SALESFORCE DESKTOP CLIENTS

Summary

Force.com Connect for Outlook, Force.com Connect Offline, and Force.com Connect for Office are desktop clients that integrate Salesforce with your PC.

Administer Salesforce Desktop Clients

- You must have Enterprise, Unlimited, Performance, or Developer Edition.
- You must have the "Manage Profiles and Permission Sets" permission to modify profiles.

Checking for Updates

If users can see update alerts, provided they have successfully logged in from the client in the past, a banner automatically displays across the Home tab whenever a new version is available. Alternatively, in their personal settings they can click **Check for Updates** to see which client versions they have installed.

You can enable or disable access to desktop clients for your users, and turn on or off the automatic notifications that announce new client versions.



Note: The information doesn't apply to Salesforce for Outlook.

For each profile, you can control how users interact with desktop clients.

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
2. Select a profile.
3. In the Desktop Client Access settings page or Desktop Integration Clients section, click **Edit**.
4. For each drop-down list, choose one of the following options:

Option	Meaning
Off (access denied)	Users cannot download or use the client.
On, no updates	Users can access the client but cannot upgrade.
On, updates w/o alerts	Users can access the client and are allowed to upgrade it, but do not see alerts when a new version is made available.
On, updates w/alerts	Users can access the client and will see update notifications. They will see update alerts, which they can follow or ignore.
On, must update w/alerts	Users can access the client and must upgrade to the latest version whenever an update is available. They will not be able to log in from the client until they have upgraded it.

5. Click **Save**.

For more information, see:

- "Desktop Client Access" in the Salesforce Help
- "Connect for Outlook (Retired)" in the Salesforce Help
- "Force.com Connect Offline" in the Salesforce Help
- "Report on Salesforce Data with Excel" in the Salesforce Help
- "Create Mail Merge Templates with Microsoft® Word" in the Salesforce Help