



# GETTING STARTED WITH FORCE.COM CONNECT OFFLINE

## Summary

Using Force.com Connect Offline, you can work on your key deals anywhere, anytime—totally unplugged.

## What is Connect Offline?

Connect Offline is a client application that lets you access a subset of Salesforce records using the same browser-based interface as the online system but without an Internet connection. Use Connect Offline to view, edit, create, and delete accounts, activities, contacts, opportunities, leads, and custom object records (including relationship groups). You can also add and update products and schedules on opportunities.

The subset of Salesforce records accessible in Connect Offline is referred to as a *briefcase*. Administrators can create *briefcase configurations*, which are sets of parameters that determine the records available in the briefcases of users with a specific profile. Organizations can have multiple briefcase configurations and associate each with a different set of profiles to simultaneously suit the needs of various types of offline users. For example, one configuration might include leads and opportunities in the briefcases of users with a Sales Representative profile, while another configuration includes accounts and related opportunities in the briefcases of users with an Account Executive profile. Users without an assigned briefcase configuration can configure the settings for their own Connect Offline briefcase and can manually select the accounts the briefcase includes.

When online, users can synchronize their Connect Offline briefcases with Salesforce. During synchronization, the changes to records in the briefcase are implemented in Salesforce, and vice-versa. This ensures that both Salesforce and Connect Offline have the most current records. If updates to a record in the briefcase conflict with updates to a record in Salesforce, Connect Offline displays the conflict resolution tool, which allows users to easily resolve the conflict.

## Connect Offline System Requirements

- Microsoft® Internet Explorer® 6, 7, or 8 (We don't support other browsers, including Mozilla® Firefox®, Apple® Safari®, and Google Chrome™.)
- Microsoft Windows® 2000, Windows XP, Windows Vista®, or Windows 7



**Note:** The 32-bit version of Internet Explorer 8 with its Compatibility View option is required for the 64-bit version of these operating systems.

- 256 MB of RAM (512 MB recommended)
- 20 MB of disk space minimum (250 MB recommended depending on the size of the briefcase)
- Intel® Pentium® II processor, 500 MHz or above

## Installing Connect Offline

To download and install the Connect Offline client:

1. From your personal settings, enter *Connect Offline* in the *Quick Find* box, then select **Connect Offline**.
2. Click **Install Now**.



**Note:** You must have administrator privileges on the computer on which you install Connect Offline.

3. Click **Yes** when prompted to install and run the client.
4. Follow the prompts in the setup wizard to complete the installation.
5. Log in to Connect Offline to verify the installation.

## Logging In to Connect Offline

1. On your computer, click **Start > Programs > salesforce.com > Connect Offline**, or double-click the Connect Offline desktop icon.



**Important:** The first time you log into Connect Offline, you must have an Internet connection.

2. Enter your Salesforce username and password.



**Note:** If your organization restricts IP addresses, logins from untrusted IPs are blocked until they're activated. Salesforce automatically sends you an activation email that you can use to log in. The email contains a security token that you must add to the end of your password. For example, if your password is *mypassword*, and your security token is *XXXXXXXXXX*, you must enter *mypasswordXXXXXXXXXX* to log in.

3. Select the **Update tab names** checkbox if you want Connect Offline to reflect any changes to the names of fields, objects, and tabs in Salesforce since the last time you selected this option.



**Note:** Salesforce automatically updates your tabs the first time you log in.

4. Select the **Synchronize my data** checkbox to synchronize your Connect Offline briefcase with Salesforce.
5. Click **Login**.

## Synchronizing Your Data

When using Connect Offline with an Internet connection, you can synchronize your briefcase with Salesforce. During synchronization, Connect Offline updates Salesforce to reflect any changes you made to your briefcase records while offline. Connect Offline also updates your briefcase records to reflect any changes in Salesforce since your last synchronization. This ensures that both Salesforce and Connect Offline have the most current records.

Data conflicts can occur during synchronization if a user modified an online record that you also modified offline. If updates to a record in your briefcase conflict with updates to a record in Salesforce, Connect Offline displays the Conflict Resolution tool, which allows you to easily resolve the conflicts. If you do not want to resolve the conflicts at that time, click **Cancel** to exit the Conflict Resolution tool. You can return to the Conflict Resolution tool later by clicking the link in the Errors section of the Connect Offline Home tab.

## Manually Adding Accounts to Your Briefcase

If an administrator doesn't assign a briefcase configuration to your profile, click the **Include Offline** button on any account detail page to manually add the account to your Connect Offline briefcase. You can manually add up to 100 accounts in your briefcase.

You can remove manually added accounts from your briefcase as follows:

1. From your personal settings, enter *Connect Offline* in the *Quick Find* box, then select **Force.com Connect Offline**.
2. Click **Briefcase Setup**.
3. Select the checkbox next to the account to remove.
4. Click **Remove from Briefcase**.