


TeamViewer

Salesforce Integration

Configuration Guide

Rev 3.0-10/27/202020



Contents

1	Introduction	4
1.1	About TeamViewer for Salesforce	4
1.2	About this manual	4
2	Installation	5
2.1	Getting the TeamViewer App	5
2.2	Performing the installation.....	5
2.2.1	Starting the installation	5
2.2.2	Selecting the Salesforce Org to install to	6
2.2.3	Selecting who to make the app available for	6
2.2.4	Confirming the installation	7
2.3	Uninstalling TeamViewer from your Salesforce Org	8
3	Configuration	9
3.1	Configure chatter	9
3.2	Assigning permission set	9
3.3	Configuring the page layout	11
3.3.1	Example flow to add the TeamViewer components to the Case page layout in a salesforce lightning environment	12
3.3.2	Add TeamViewer unattended access to Assets page	15
3.3.3	Add TeamViewer unattended connections to Assets page	16
3.3.4	Add widget to connect to TeamViewer ID.....	16
3.4	Configuring an email template	17
4	Using TeamViewer for Salesforce	18
4.1	Setup	18
4.1.1	Session settings	18
4.1.2	Session Validity.....	18
4.1.3	Setup Asset field for TeamViewer Partner Id	19
4.1.4	Setup Case field for TeamViewer Partner Id.....	19
4.1.5	TeamViewer Oauth Credentials.....	20
4.1.6	Supported objects	22
4.1.7	Setup custom recipient field	23
4.1.8	Setup API to import TeamViewer Device Ids.....	24
4.1.9	Setup script token	24
4.2	Sign in and Sign out.....	27
4.3	Remote control session	28



4.3.1	Create remote control session	28
4.3.2	Share remote control session.....	29
4.3.3	Starting remote control session	30
4.3.4	Closing remote control session	33
4.4	Assist AR Session.....	34
4.4.1	Create Assist AR session	34
4.4.2	Share Assist AR session via SMS.....	34
4.4.3	Share Assist AR session via email	35
4.4.4	Starting the Assist AR session.....	37
4.4.5	Closing a Assist AR session	37
4.5	Create New Session.....	37
4.5.1	Create a new session with remote control session enabled	38
4.5.2	Create a new session with Assist AR session enabled	38
4.5.3	Create a new session with both remote control and Assist AR sessions enabled	39
4.6	TeamViewer History	39
4.7	Connection History	40
4.7.1	Connection report for Assets (Unattended connections).....	41
4.8	Companywide Connection Report	41
4.9	TeamViewer Reports	42
4.9.1	Importing the report data from the TeamViewer Backend	44
4.9.2	Create Reports with TeamViewer and Salesforce data	46
4.10	Event log	51
4.11	Enable Unattended Access to Registered Devices	52
4.11.1	VPN Connections for Unattended Access.....	55
4.11.2	File Transfer for Unattended Access.....	55
4.12	TeamViewer WEB based Version	56
4.13	Optional Session Context	57
4.14	TeamViewer MyDevices	57
4.15	TeamViewer Session Notification	58
4.15.1	Enable TeamViewer notification in the Salesforce console.....	58
4.15.2	Enable TeamViewer notification in Salesforce lightning.....	59
4.16	TeamViewer Connect to Partner ID	61
4.16.1	VPN Connections for Partner ID	62
4.16.2	File Trasfer for Partner ID	62
4.16.3	Connect to Parter ID on Case	63
4.17	Support for Experienced Cloud.....	63
4.17.1	Add TeamViewer components to the experience cloud.....	63
4.17.2	View the TeamViewer components in the experience cloud	66
4.18	TeamViewer Session Insights.....	67



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.

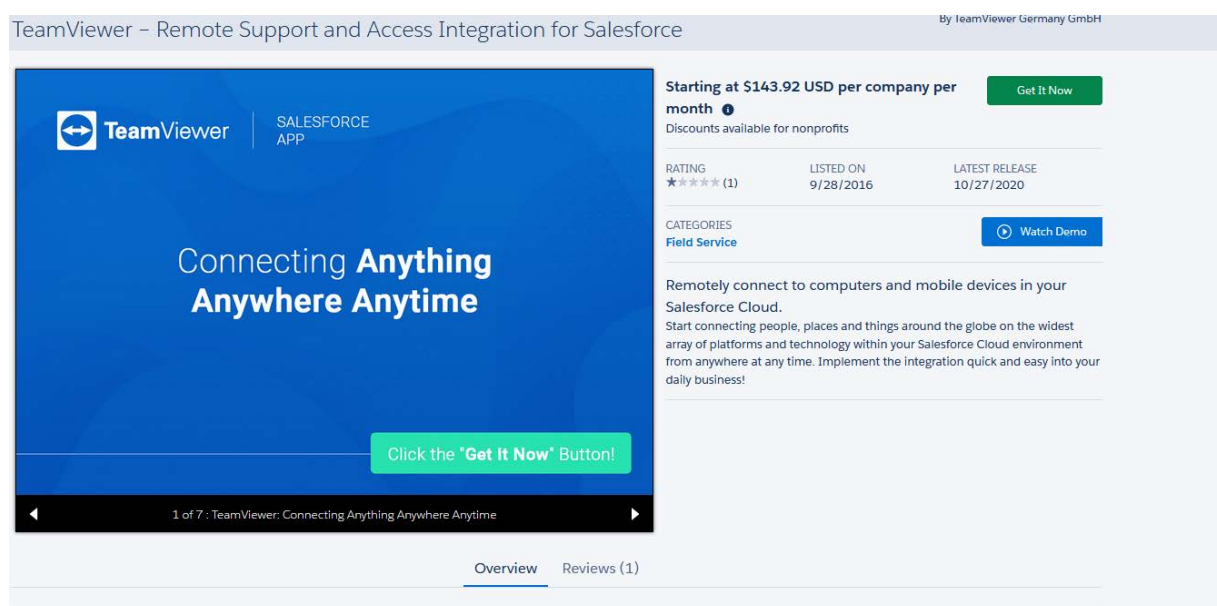


Figure 1



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.

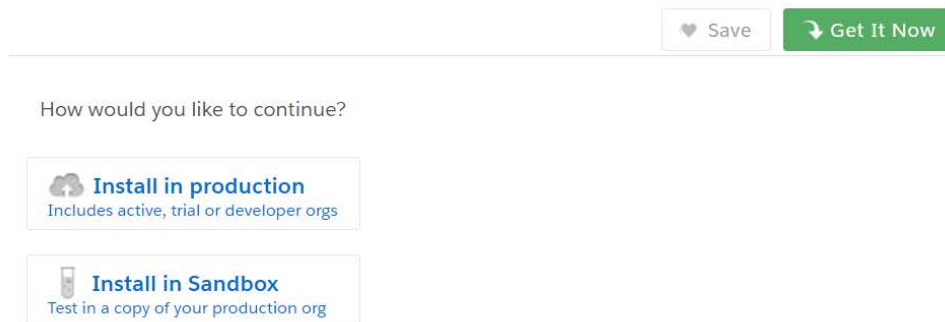


Figure 2

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.

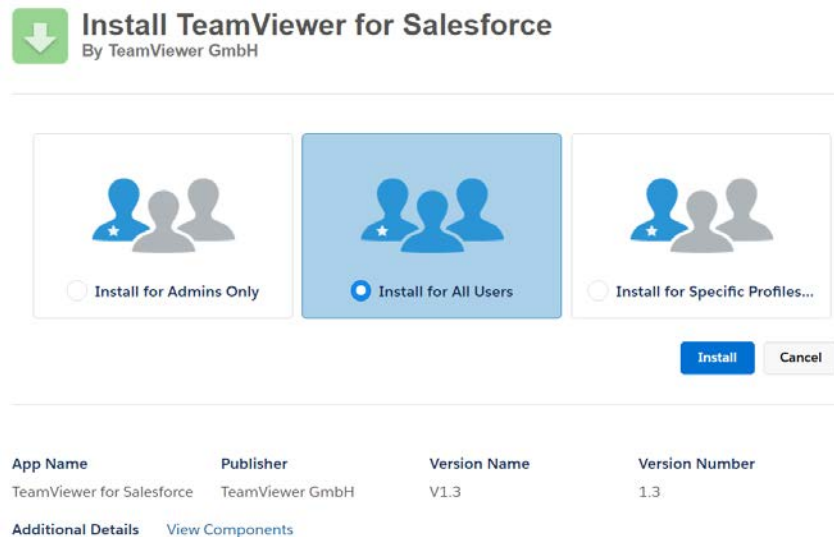


Figure 3

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.

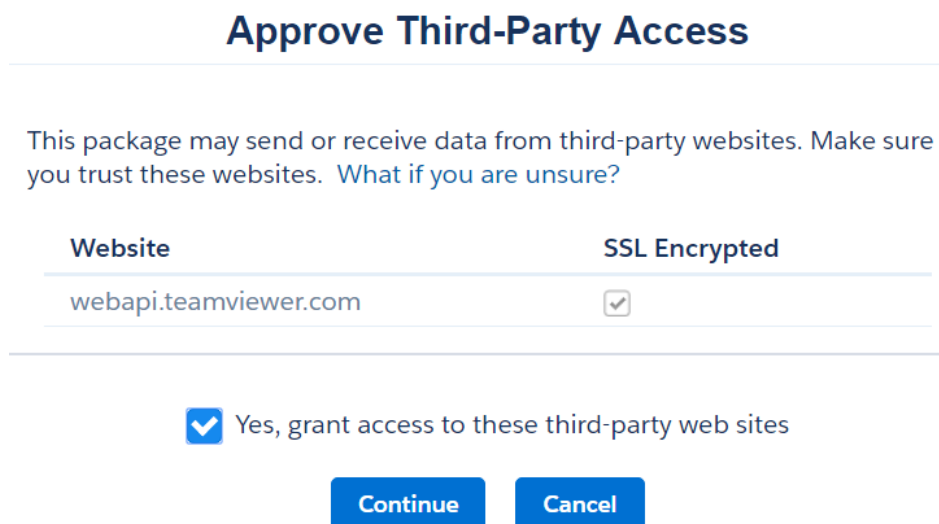


Figure 4

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* (0000000000001234)

User: *Username* (0000000000001235)

Package: TeamViewer for Salesforce (0000000000001236)

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.

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall Manage Licenses	TeamViewer for Salesforce	TeamViewer GmbH	3.129	stiv	Active	Unlimited	0	☐	Does not Expire	18/06/2025, 09:54	☐	0	5	14	Passed

Uninstalled Packages

No uninstalled package data archives

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.

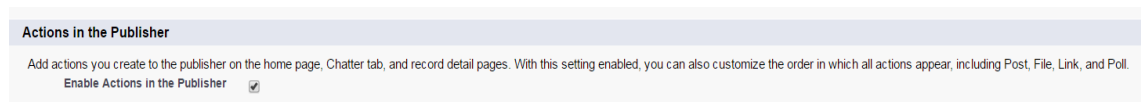


Figure 6

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.

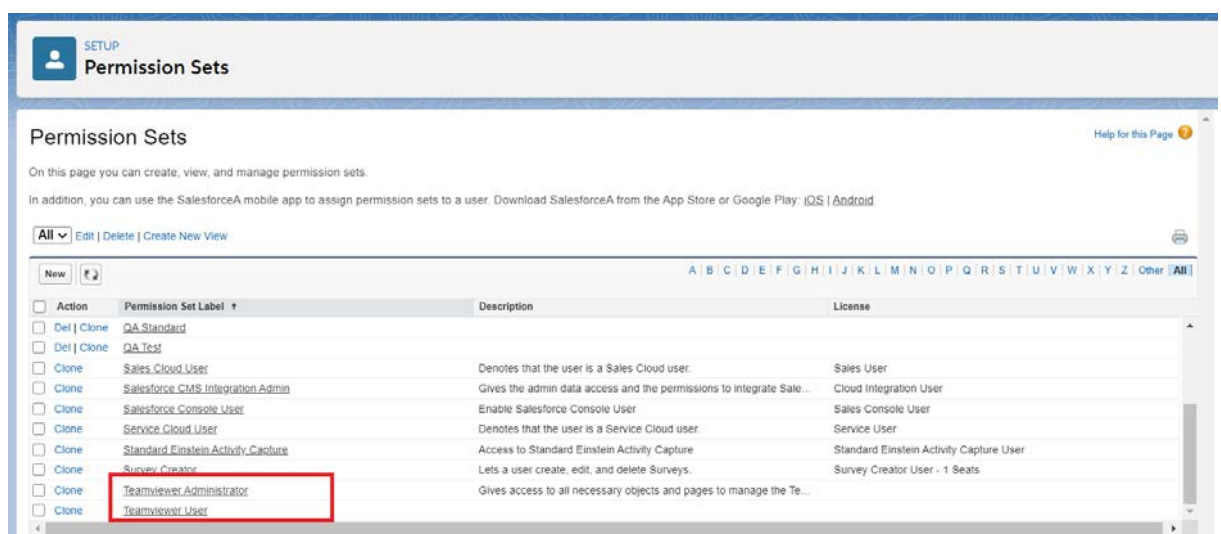


Figure 7

- 1) Click on one of the permission sets e.g., TeamViewer User.



2) Click on “Manage Assignments”.

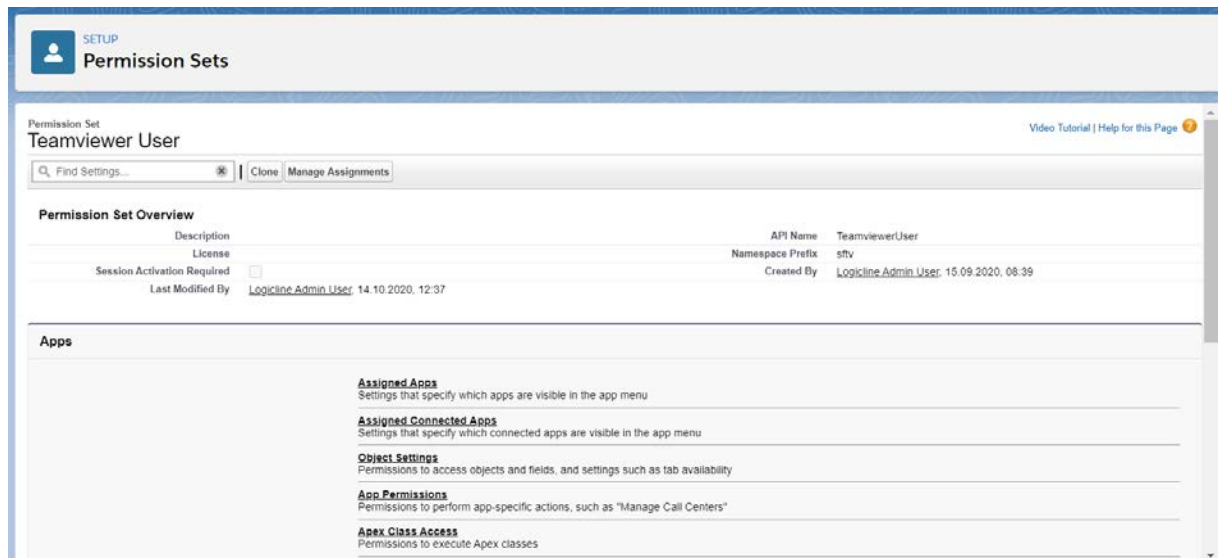


Figure 8

3) Click on “Add Assignments”.

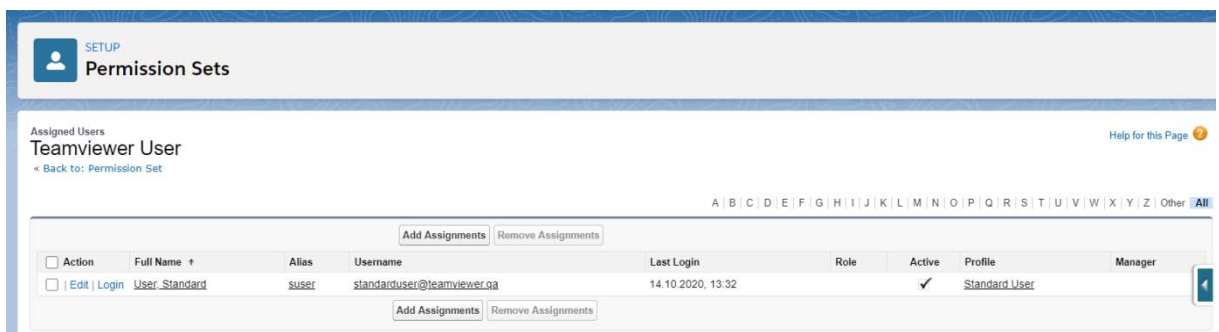


Figure 9

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

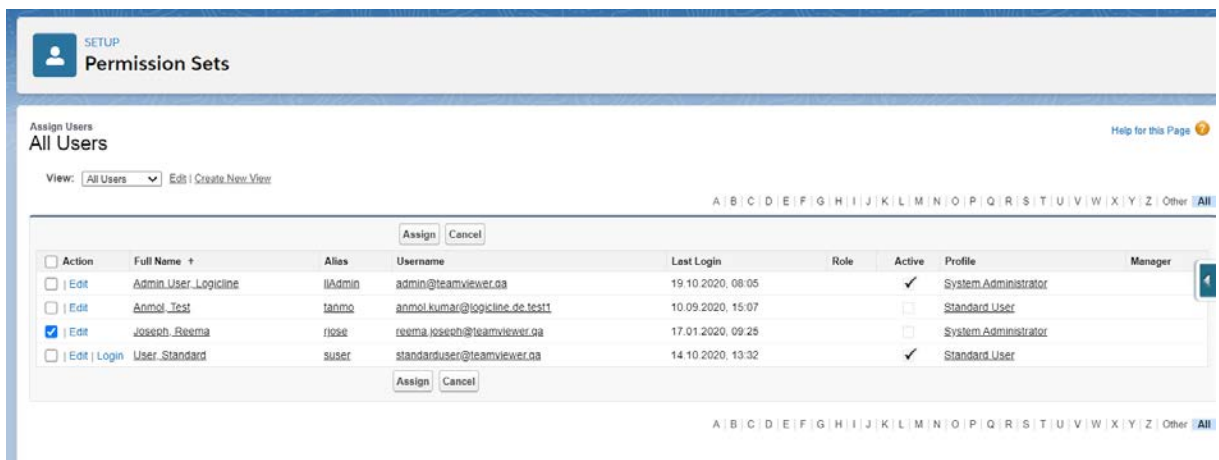


Figure 10



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 Lightning experience mode.

Salesforce Lightning

Feed Related **TeamViewer Session** TeamViewer History Connection History

TeamViewer [Sign Out](#)

[Join Via TeamViewer Client](#) [Join Via Web Browser](#) [Close Session](#)

Session Type
Remote Control

Valid Until
Thursday 14 Aug 2025, 13:03

Session Code ⓘ
s155-215-273 [Copy](#)

Session Link ⓘ
<https://get.teamviewer.com/v15/s155215273> [Invite Via Email](#)

Figure 13: TeamViewer Session details in Salesforce lightning

Feed Related TeamViewer Session **TeamViewer History** Connection History

Search by type, state, code or session/supporter link [🔍](#)

s155-215-273

Created	Wednesday 13 Aug 2025, 13:03
Valid Until	Thursday 14 Aug 2025, 13:03
Type	Remote Control
State	Open
Session Link	https://get.teamviewer.com/v15/s155215273
Supporter Link	https://get.teamviewer.com/v15/s155215273-08tvJHX9LB RN

s129-342-400

Created	Tuesday 12 Aug 2025, 11:41
Valid Until	Wednesday 13 Aug 2025, 11:41
Type	Assist AR
State	Closed
Session Link	https://getassistar.teamviewer.com/s129342400
Supporter Link	https://get.teamviewer.com/v15/s129342400-pPxj56uf8qKJ

Figure 14: TeamViewer Session history in Salesforce lightning



Feed

Related

TeamViewer Session

TeamViewer History

Connection History

Session code

View all connections

Session Code	Type	DeviceId	Device Name	Supporter	Start Date	End Date
1 N/A	Remote Control Unattended	619498258		Jennifer Stein	12 August 2025 at 14:35	12 August 2025 at 14:35
2 N/A	Remote Control Unattended	619498258		Jennifer Stein	12 August 2025 at 13:24	12 August 2025 at 13:27
3 s166-089-484	Remote Control	342516125		Jennifer Stein	12 August 2025 at 10:55	12 August 2025 at 10:57
4 s149-130-918	Assist AR	555393825		Jennifer Stein	11 August 2025 at 16:13	11 August 2025 at 16:16
5 s166-758-475	Remote Control	342516125		Jennifer Stein	11 August 2025 at 15:38	11 August 2025 at 15:39
6 s110-884-191	Remote Control	342516125		Jennifer Stein	11 August 2025 at 15:23	11 August 2025 at 15:25

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

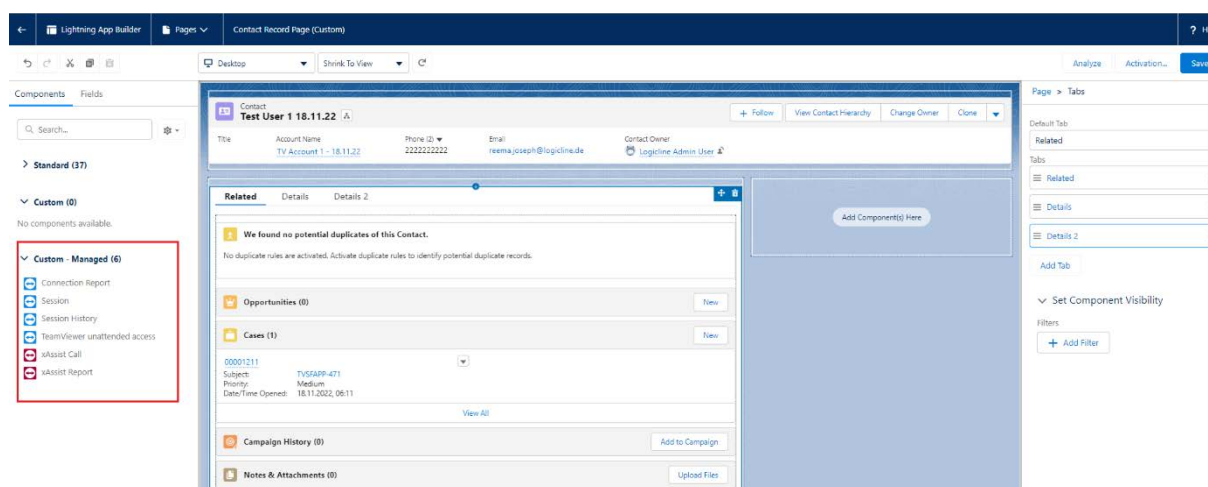


Figure 16

- 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.

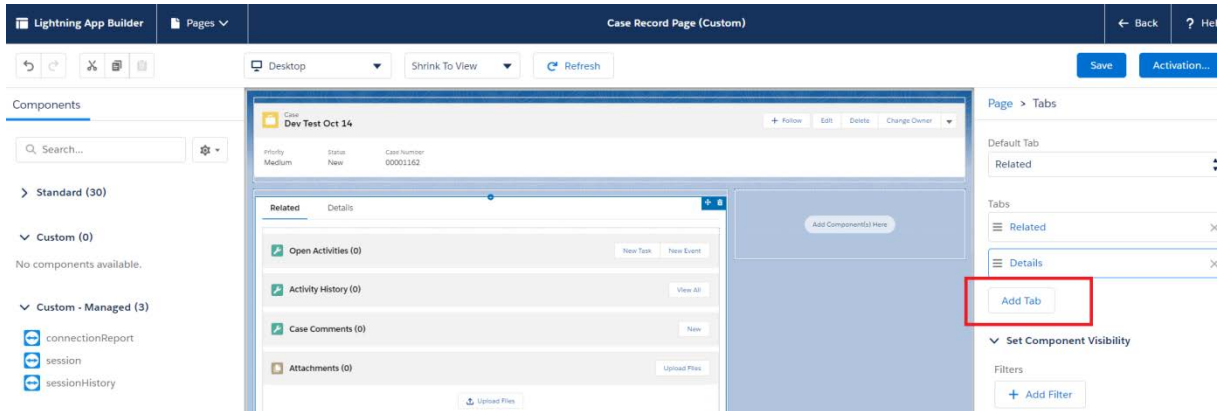


Figure 17

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

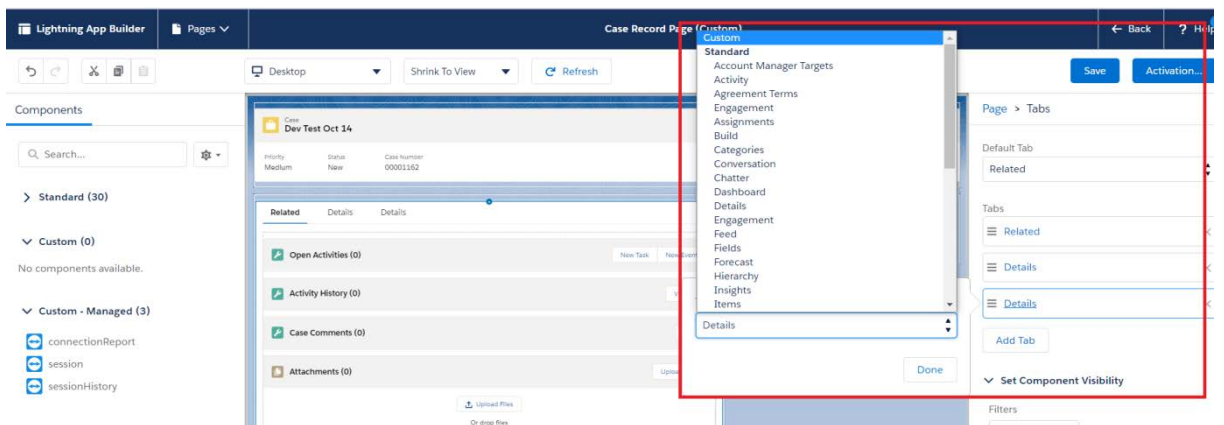


Figure 18

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

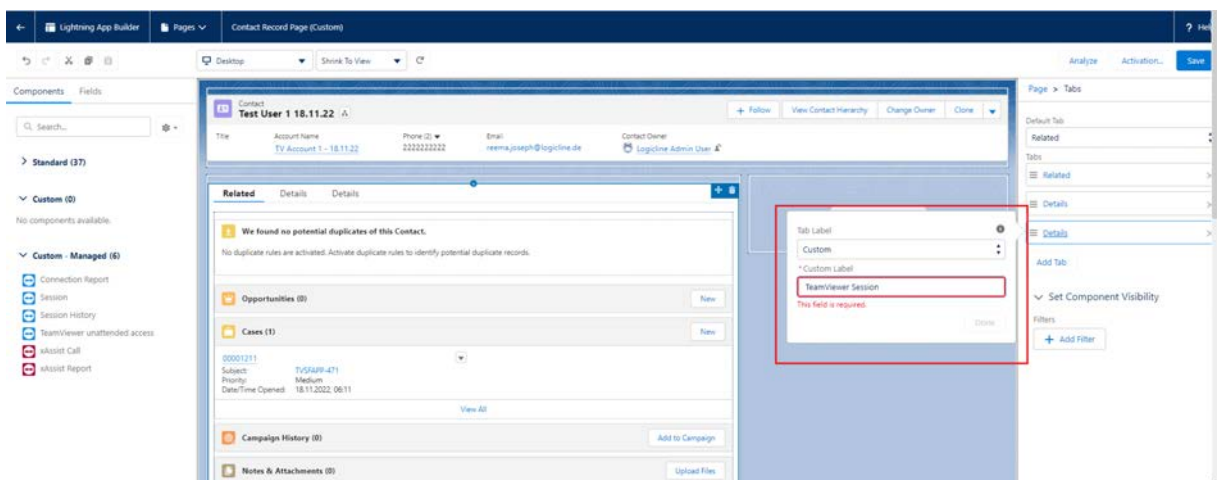


Figure 19

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

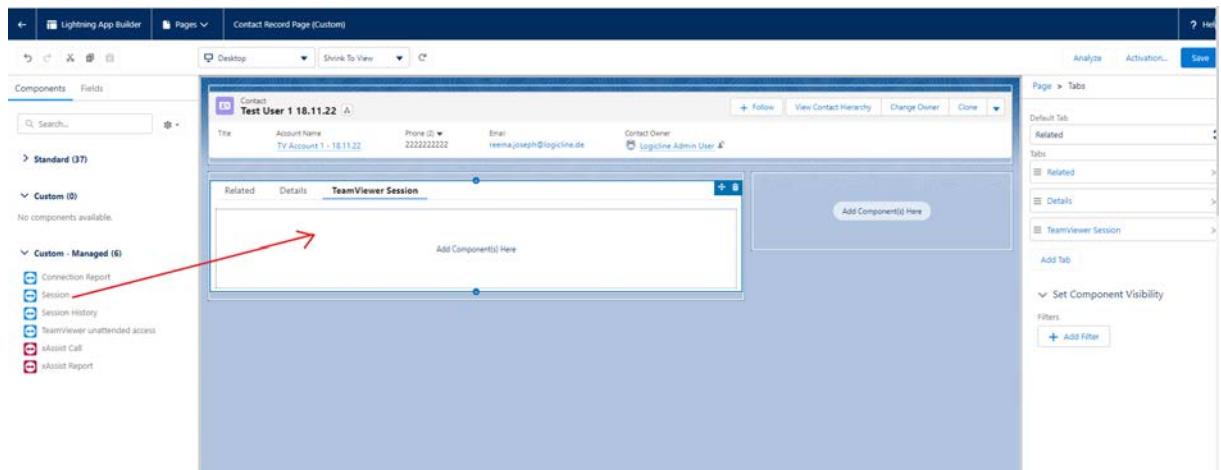


Figure 20

- 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.

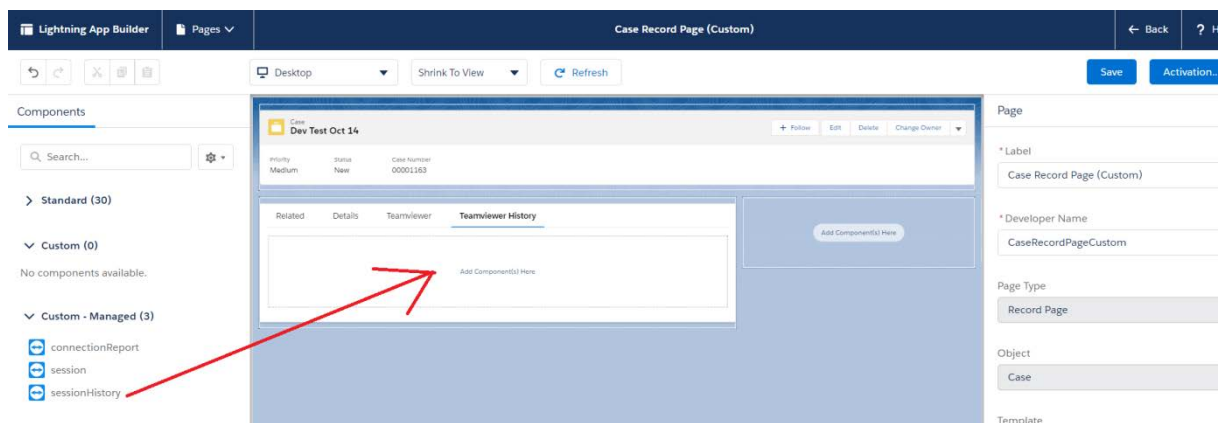


Figure 21

- 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.

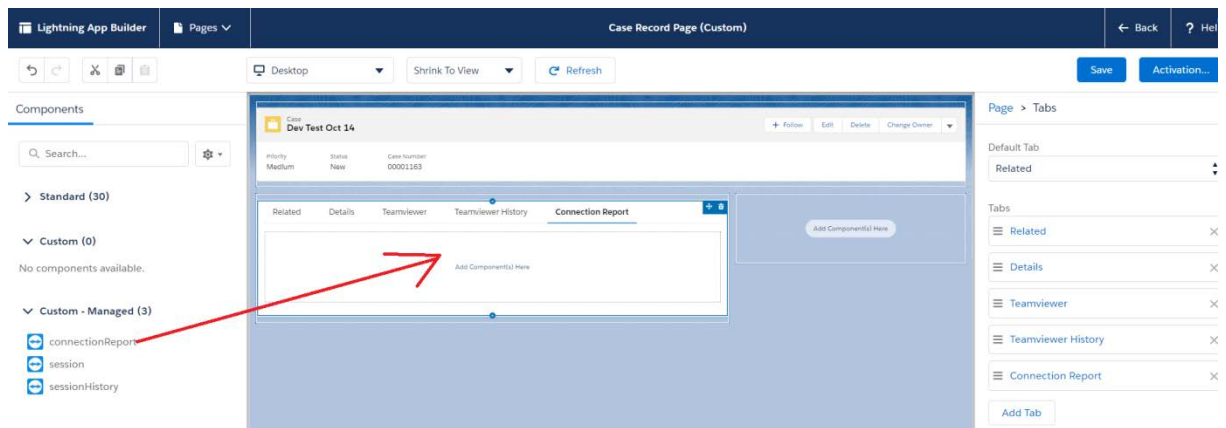


Figure 22

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

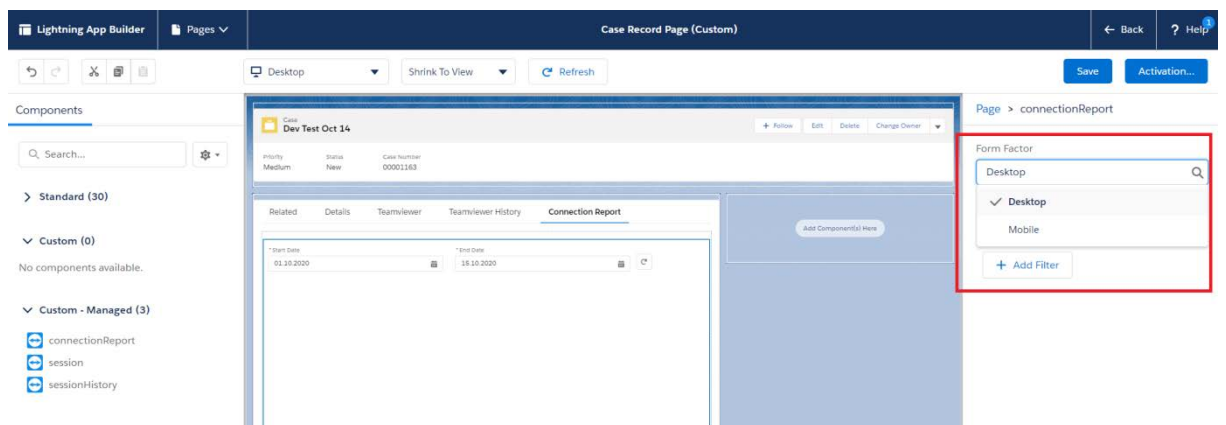


Figure 23

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

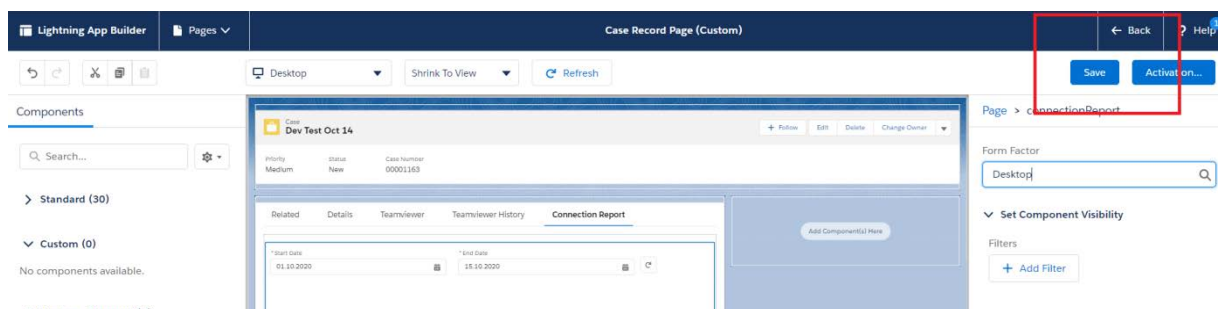


Figure 26

15) This will load the case page with added components.

16) 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.

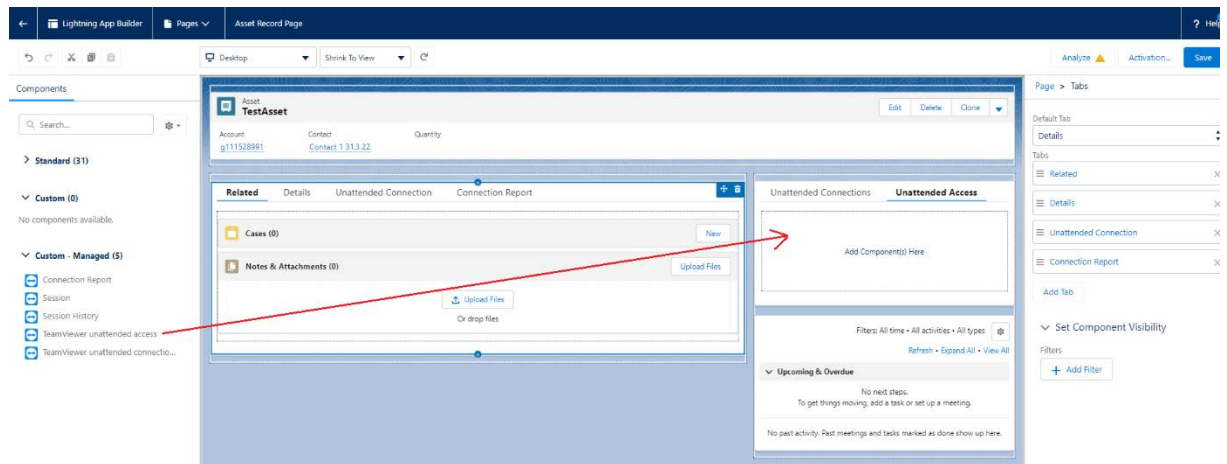


Figure 27

- 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.

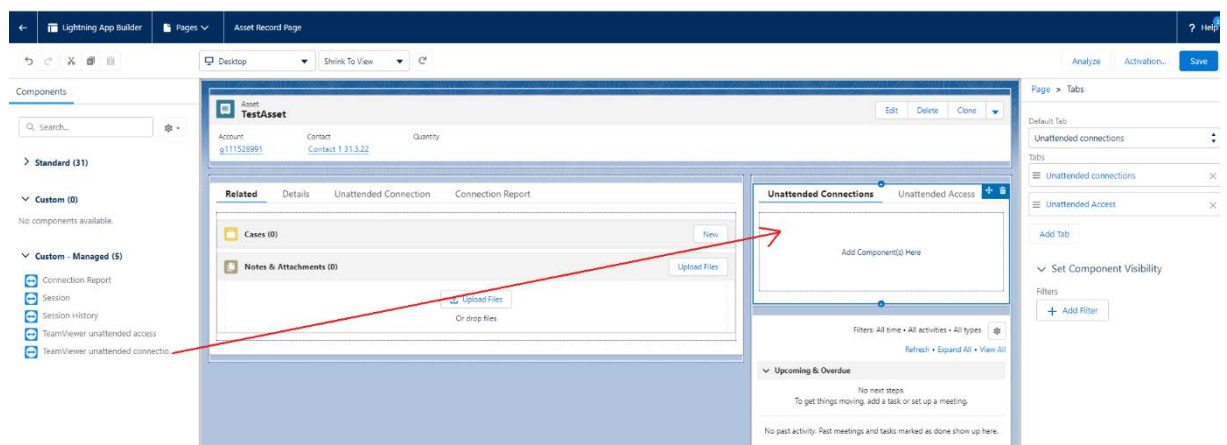


Figure 28

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

3.3.4 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.

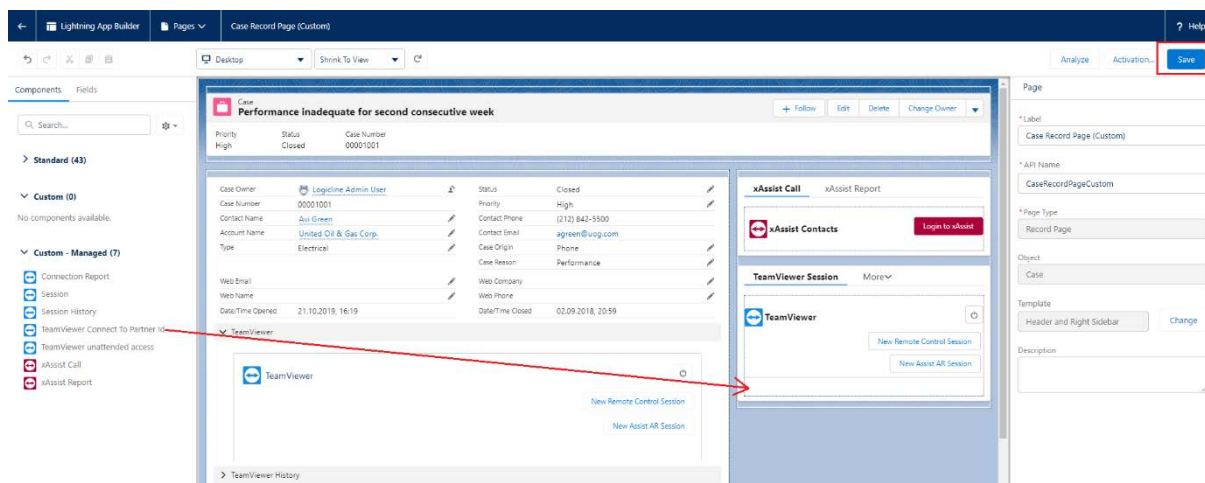


Figure 39

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.

Complete all the steps below to finish setting up the app 14% Complete

General Settings

- Allow RC Session ☒
- Allow Assist AR Session ☒
- Allow Web Based Client ☒
- Match unattended devices groups with accounts ☒
- Share Context Information with TeamViewer backend ☒
- Session Validity (hours)
- Asset field for TeamViewer Partner Id
- Case field for TeamViewer Partner Id**
- API to import TeamViewer Device Ids

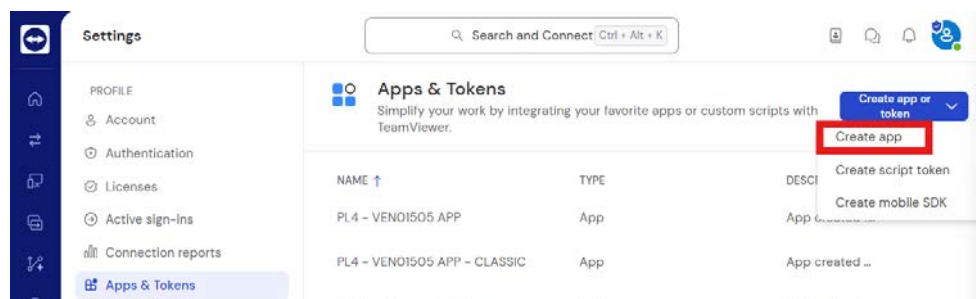
Execute

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:



App permissions

List of selected permissions.

Account management

view online state, view account data, view email address, view license.

Event logging

allow requesting all event logs

Connection reporting

read connection entries

Contacts

view entries

Group management

read groups, edit groups, share and unshare groups.

Session management

view own sessions, view all sessions, create sessions, edit own sessions, edit all sessions of the company.

- 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

 **App details**
View and copy app details.

 Never share this information with someone you don't know or fully trust.

Redirect URI
https://business-connect-4254-dev-
ed.scratch.my.salesforce.com/apex/sftv__callback

Client ID
750577-

Client secret
Csujj5SJsx

- 5) Click on “Execute” button.



TeamViewer OAuth Credentials
TeamViewer credentials are configured. Changes may take 2-3 minutes to apply.

Client ID

Client Secret

Execute

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”.

Supported Objects
The App supports 5 Objects, to add support for additional objects Go to [Supported Objects](#).

Execute

Figure 45

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

Setup Home | Home | Object Manager

Quick Find

Setup Home
Release Updates (Beta)
Lightning Experience Transition Assistant
New Salesforce Mobile App QuickStart
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Apps

Custom Metadata Types

Supported Objects

View: All Create New View

New

Action	Label ↑	Supported Object Name	Namespace Prefix
Edit	Account Custom Recipient Setting	AccountCustomRecipientSetting	stfv
Edit	Case Custom Recipient Setting	CaseCustomRecipientSetting	stfv
Edit	Contact Custom Recipient Setting	ContactCustomRecipientSetting	stfv
Edit	Lead Custom Recipient Setting	LeadCustomRecipientSetting	stfv
Edit	Opportunity Custom Recipient Setting	OpportunityCustomRecipientSetting	stfv

Figure 46

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



The screenshot shows the 'Custom Metadata Types' setup page in Salesforce. The 'Supported Object Edit' form is displayed for the object 'CampaignMapping'. The form includes fields for 'Supported Object Name', 'Email Template Description', 'Supported Object', 'Name Field', 'Email Field', 'Primary Phone Number Field', 'Description Field', and 'Secondary Phone Number Field'. The 'Supported Object' is set to 'Campaign'. The 'Name Field' is set to 'Name'. The 'Email Field' is set to 'None'. The 'Primary Phone Number Field' is set to 'None'. The 'Description Field' is set to 'None'. The 'Secondary Phone Number Field' is set to 'None'. The 'Allow Custom Recipient?' checkbox is checked. The 'Object' dropdown is set to 'Account'. The 'Protected Component' checkbox is unchecked. The 'Save' button is highlighted.

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.

The screenshot shows the 'Supported Objects' table in the Salesforce Setup page. The table has columns for 'Action', 'Label', 'Supported Object Name', and 'Namespace Prefix'. The 'View' dropdown is set to 'All'. The 'Create New View' button is visible. The table contains five rows of data, each with an 'Edit' link and a 'New' button.

Action	Label	Supported Object Name	Namespace Prefix
Edit	Account Custom Recipient Setting	AccountCustomRecipientSetting	stfv
Edit	Case Custom Recipient Setting	CaseCustomRecipientSetting	stfv
Edit	Contact Custom Recipient Setting	ContactCustomRecipientSetting	stfv
Edit	Lead Custom Recipient Setting	LeadCustomRecipientSetting	stfv
Edit	Opportunity Custom Recipient Setting	OpportunityCustomRecipientSetting	stfv

Figure 48

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

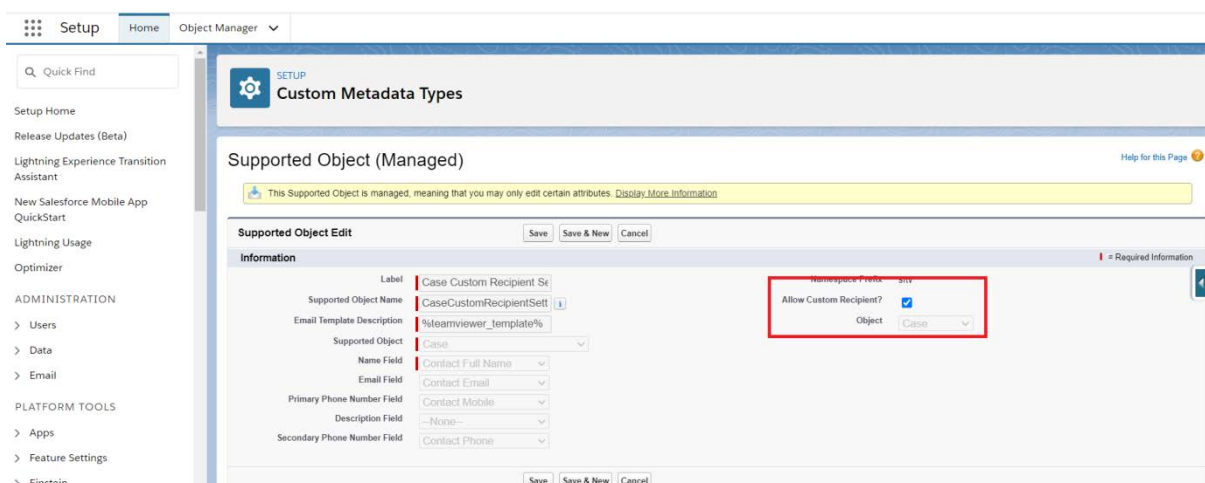


Figure 49

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.

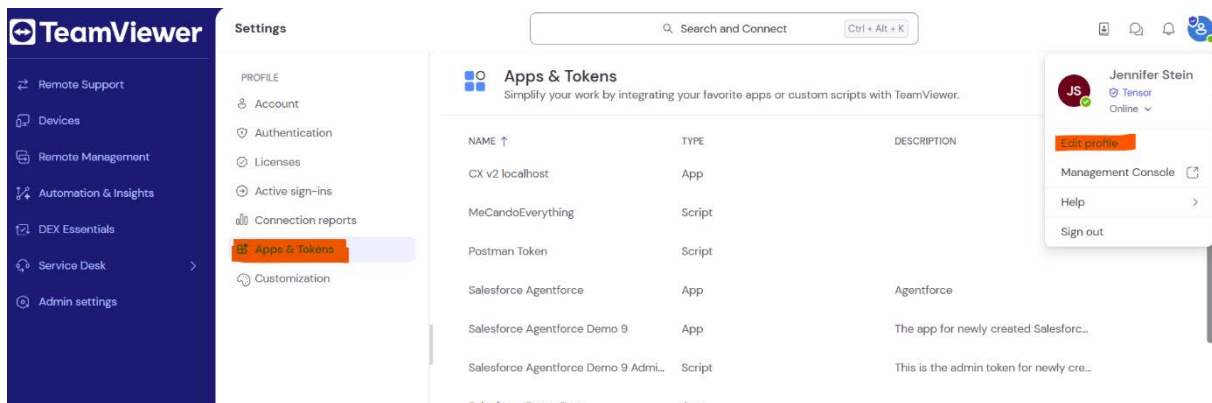


Figure 51

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

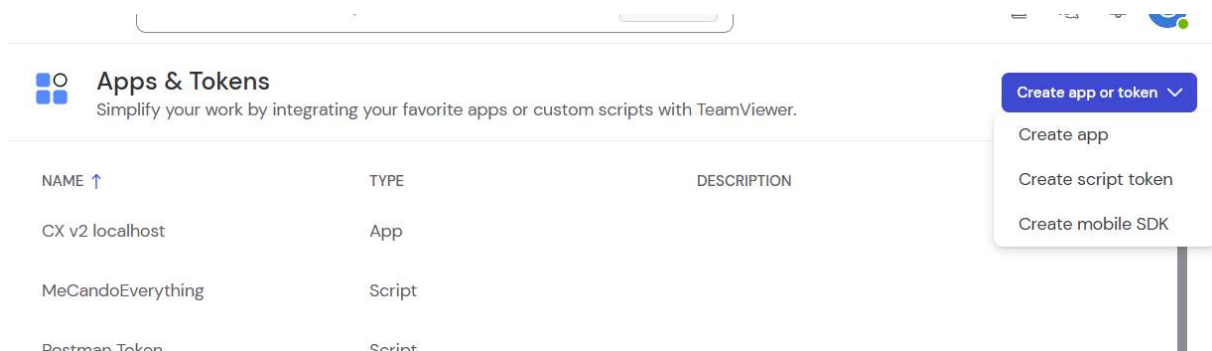


Figure 52



4) Setup permission as below

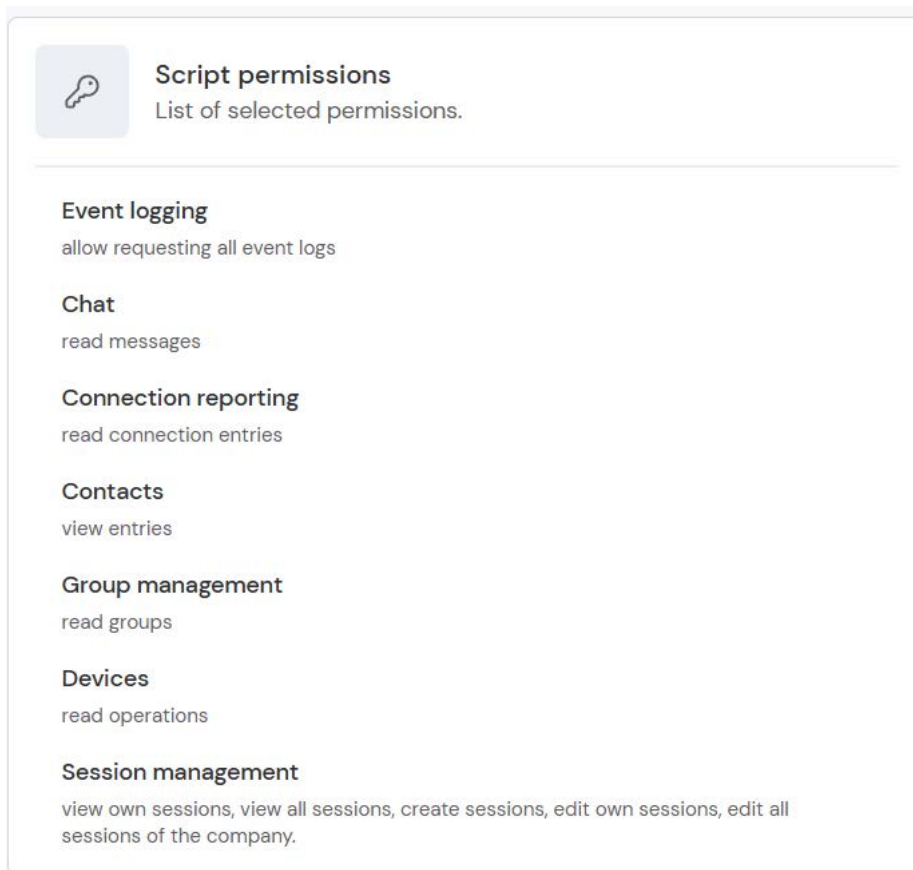


Figure 53

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.

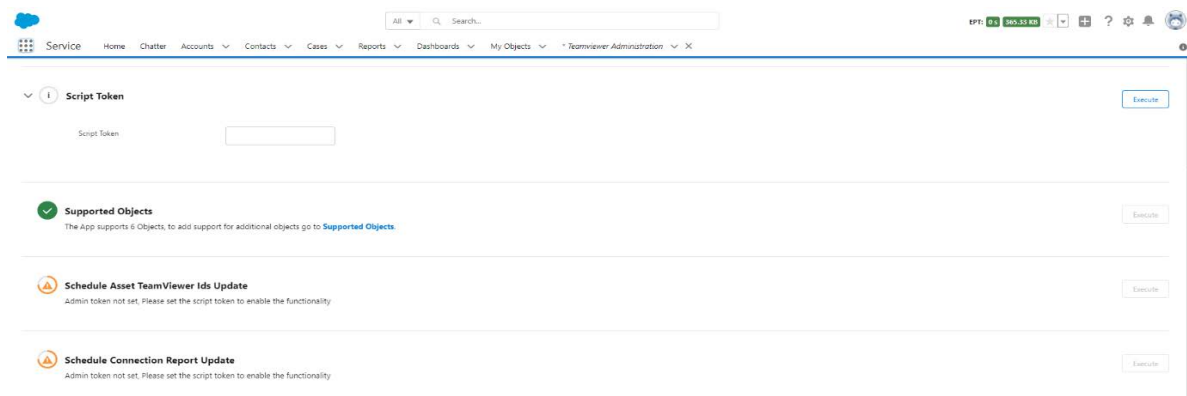


Figure 54

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.

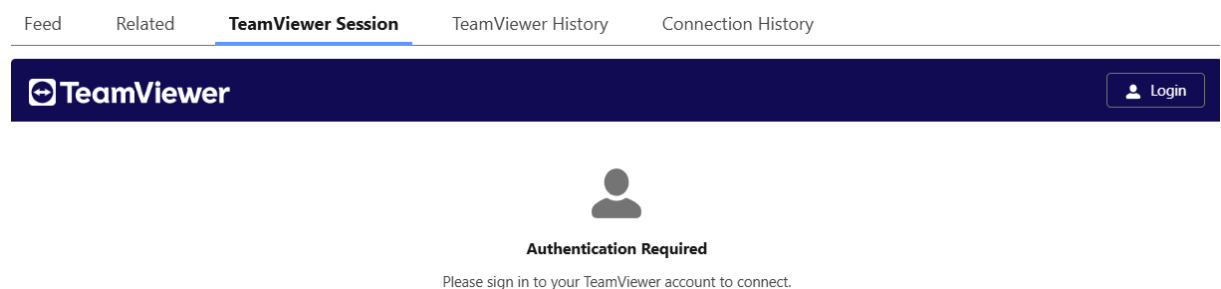


Figure 56

- 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.

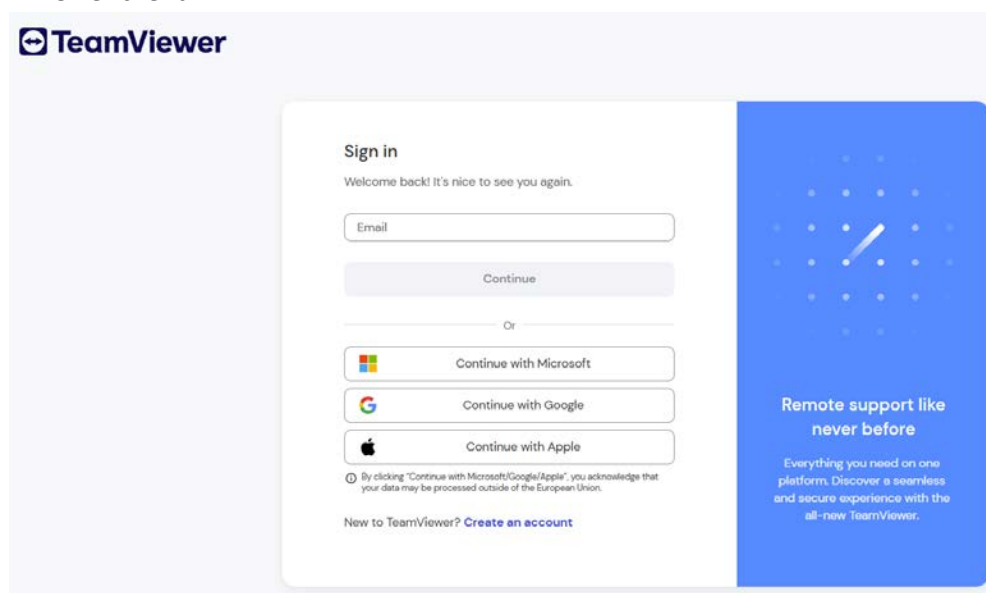




Figure 57

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

Request for permission

Salesforce for TeamViewer is requesting the following permissions:

Session management:

Create sessions, view all sessions, edit all sessions of the company, edit own sessions, view own sessions

Connection reporting:

Read connection entries

Figure 58

1. 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.

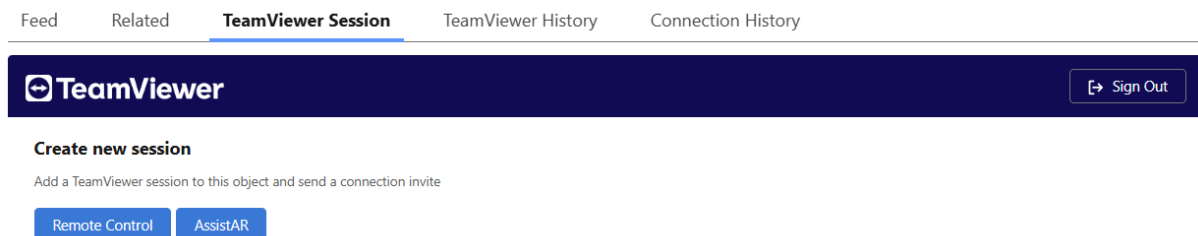


Figure 59

2. Click on the Sign Out button, the session widget should be replaced with “Login to your TeamViewer account” button.

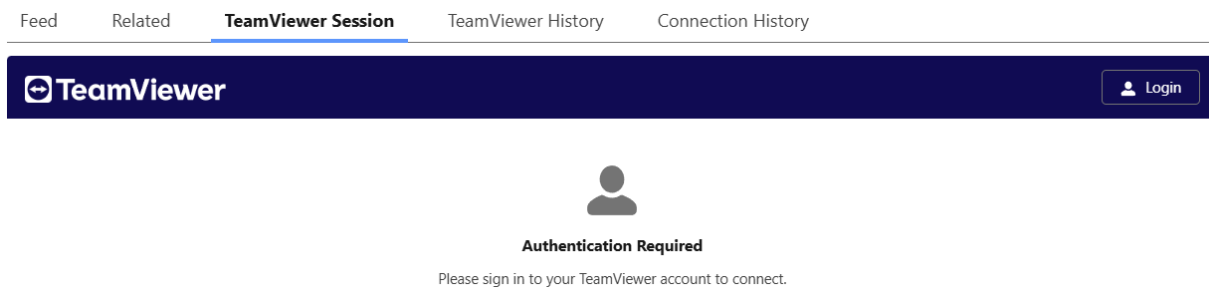


Figure 60

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.

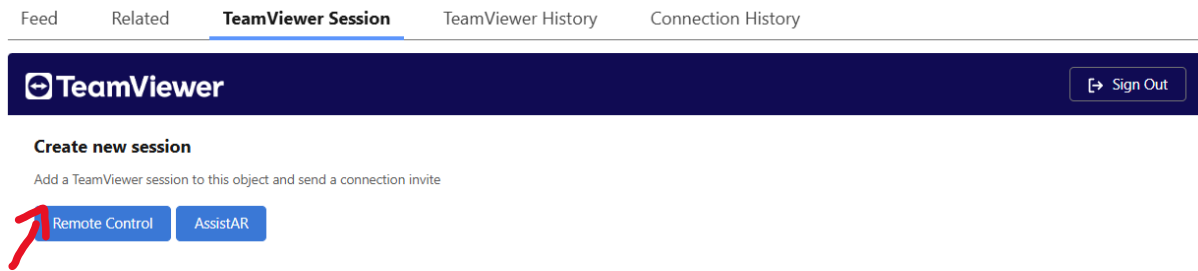


Figure 61

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

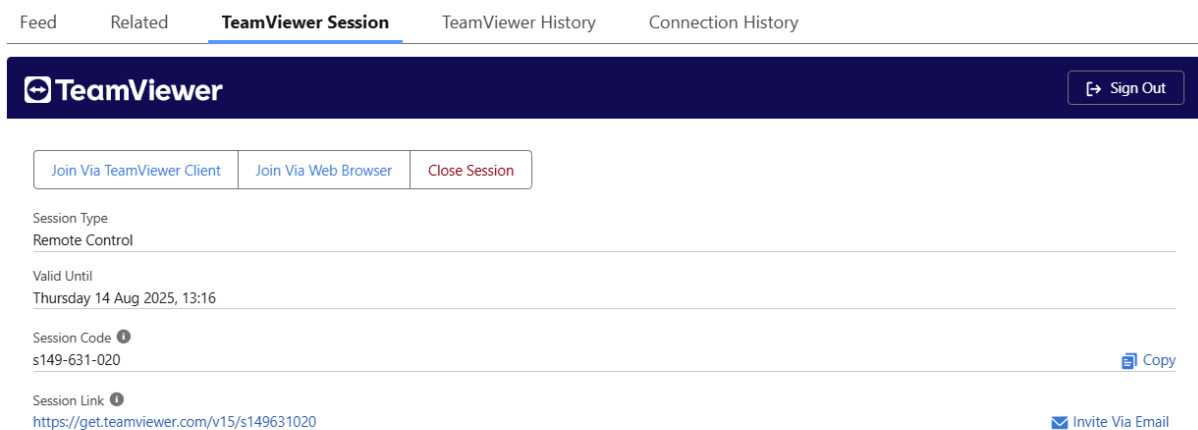


Figure 62

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.

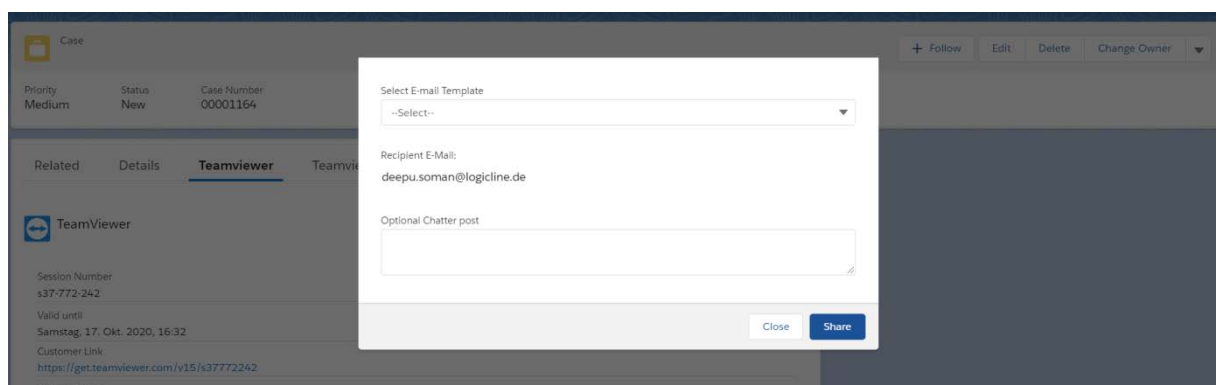


Figure 63

- 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.

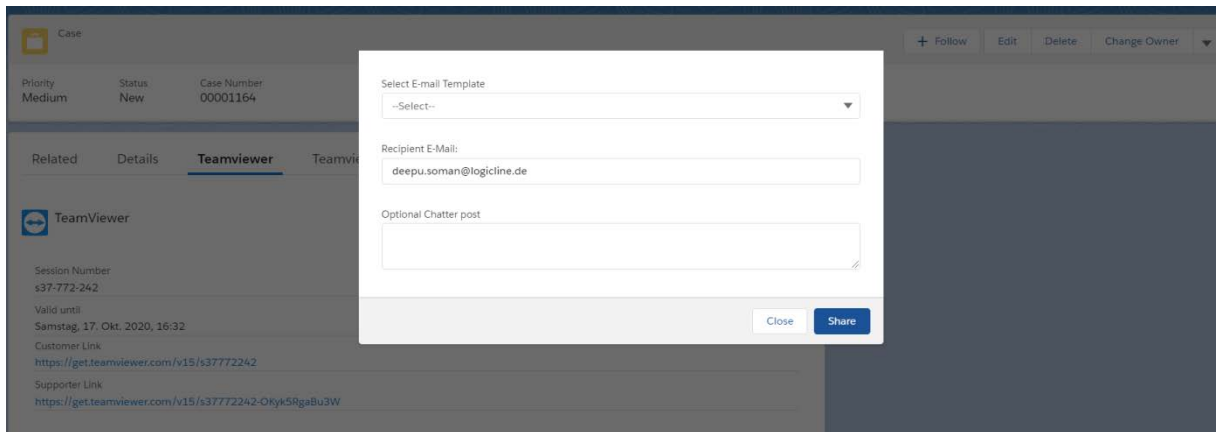


Figure 64

- 4) The “Recipient E-Mail” field 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.

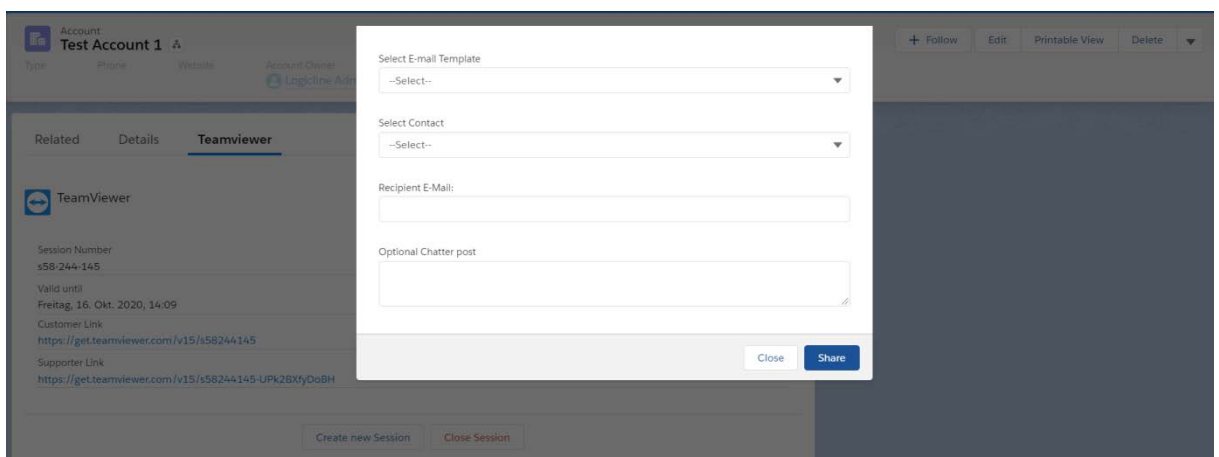


Figure 65

- 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.

3. Click on “Join via TeamViewer Client” button.



Feed Related **TeamViewer Session** TeamViewer History Connection History

 Sign Out

Join Via TeamViewer Client Join Via Web Browser Close Session

Session Type
Remote Control

Valid Until
Thursday 14 Aug 2025, 13:16

Session Code ⓘ
s149-631-020 Copy

Session Link ⓘ
<https://get.teamviewer.com/v15/s149631020> Invite Via Email

Figure 66

- 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

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

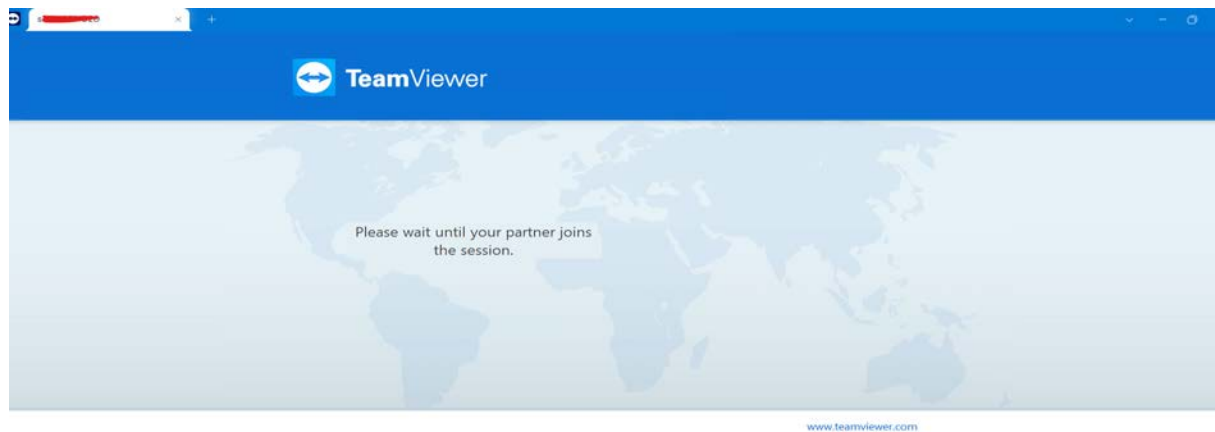


Figure 68

- 2) 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).

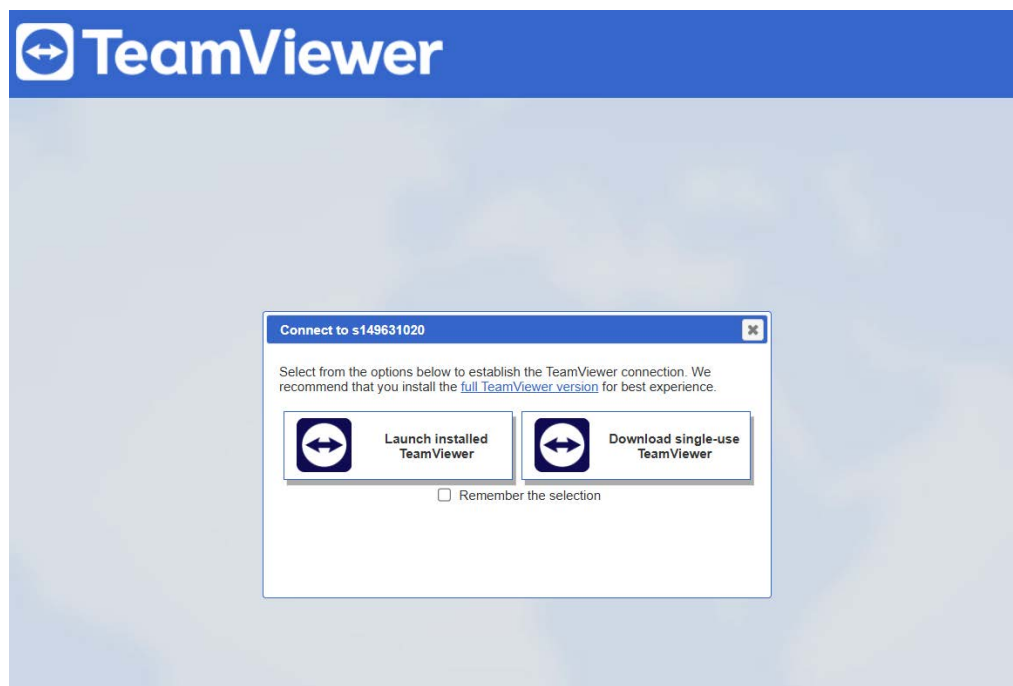


Figure 69

- 3) 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.

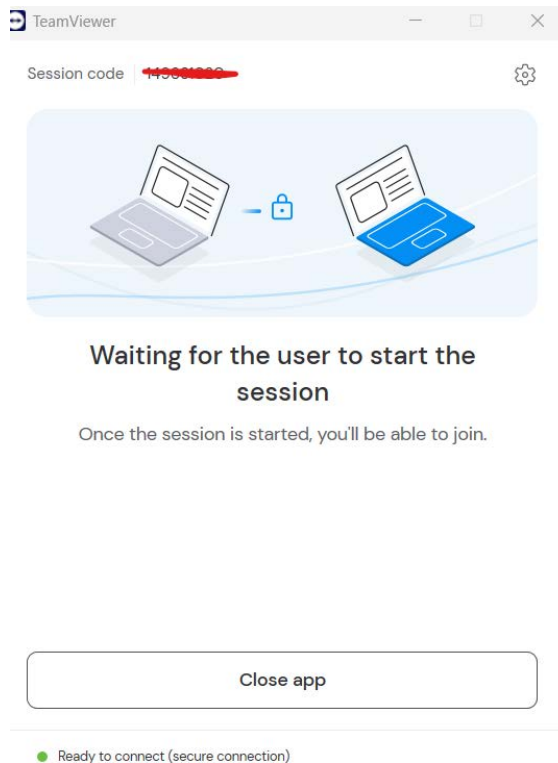


Figure 70

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.

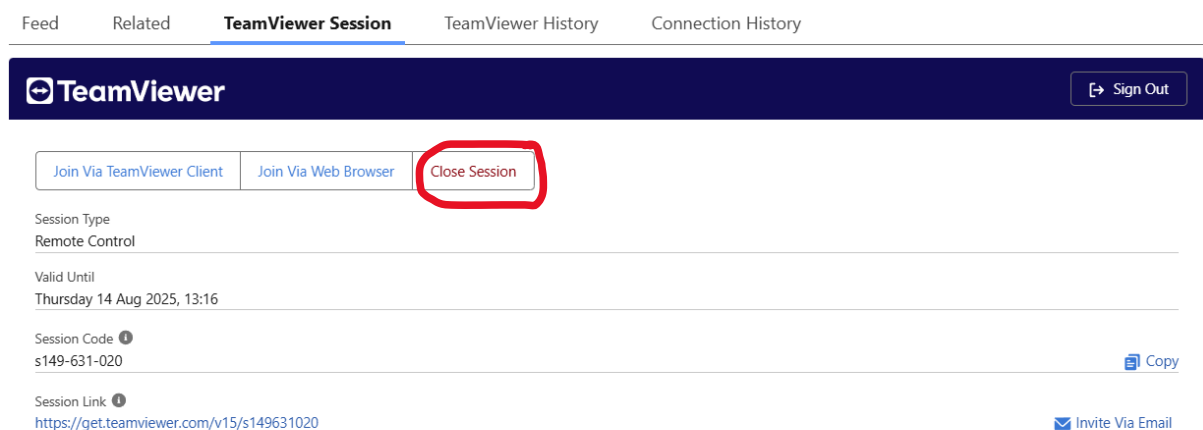


Figure 71

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

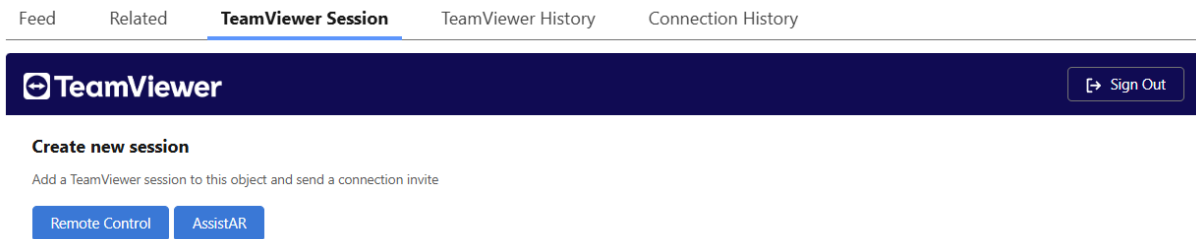


Figure 72

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

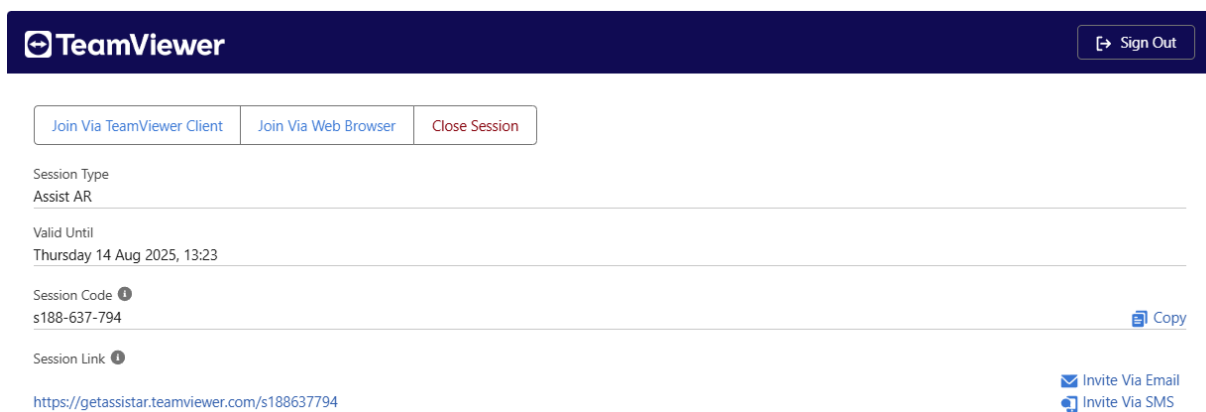


Figure 73

4.4.2 Share Assist AR session via SMS

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

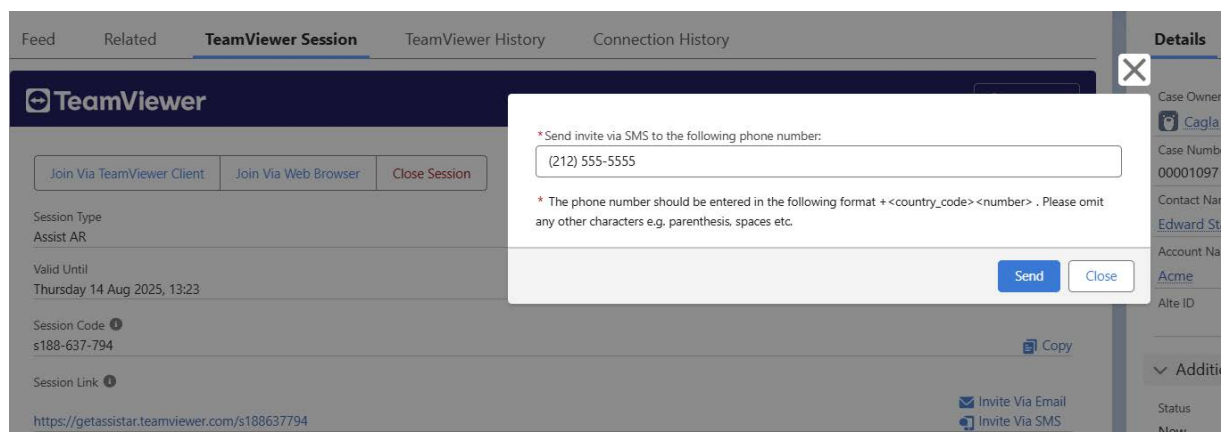


Figure 74



- 2) 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.

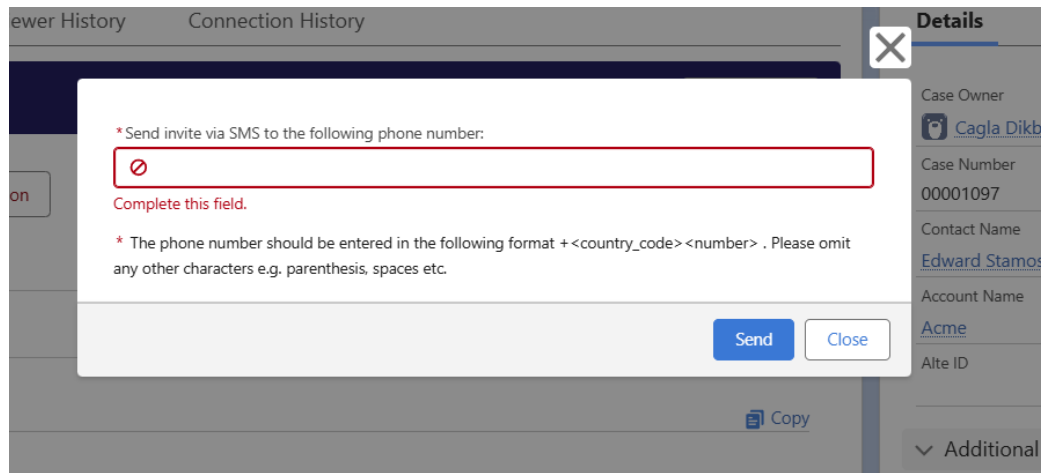


Figure 75

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

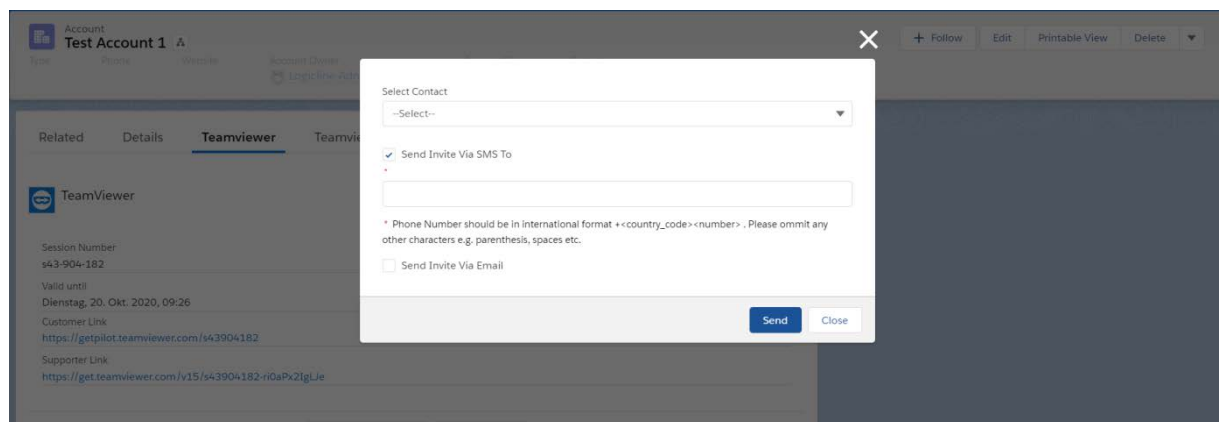


Figure 76

- 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 "Invite Via Email"

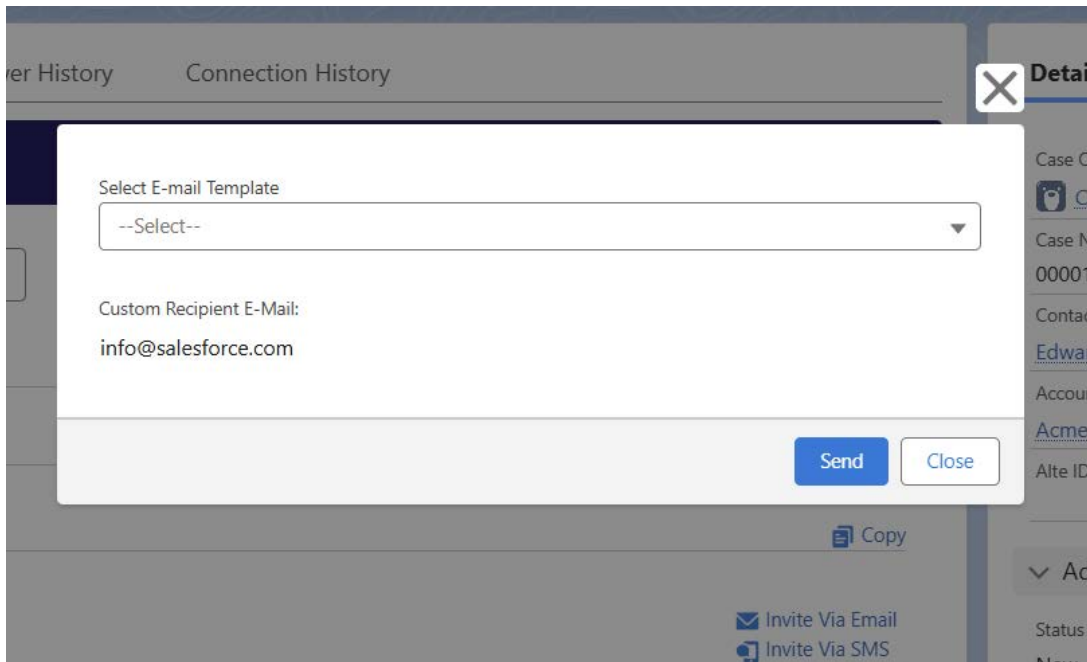


Figure 77

- 2) The “Recipient E-Mail” field 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.
 - c. If an object has multiple related objects (e.g., account having multiple contacts), the popup will be displayed as in following figure.

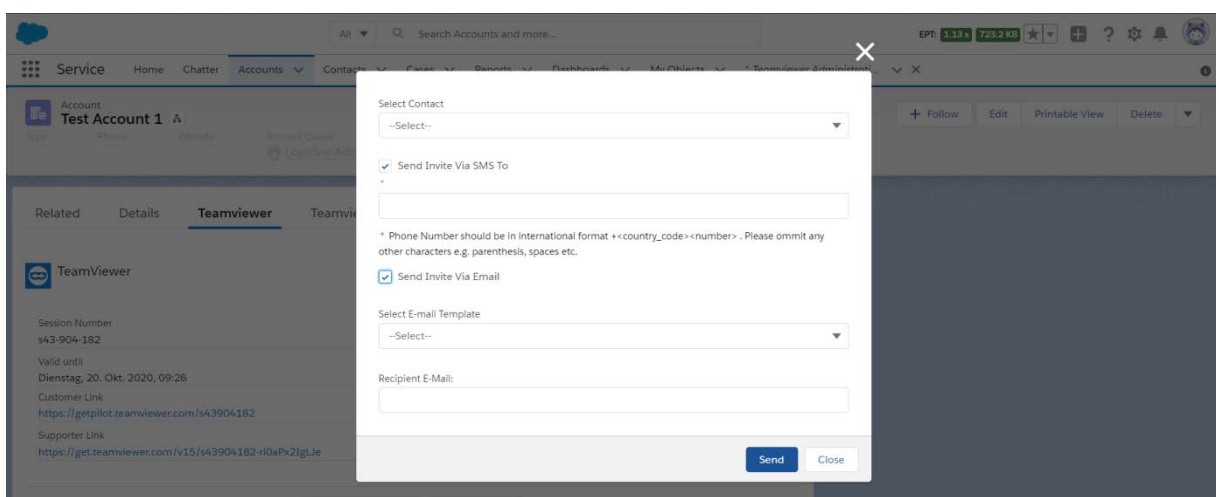


Figure 79

- 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.

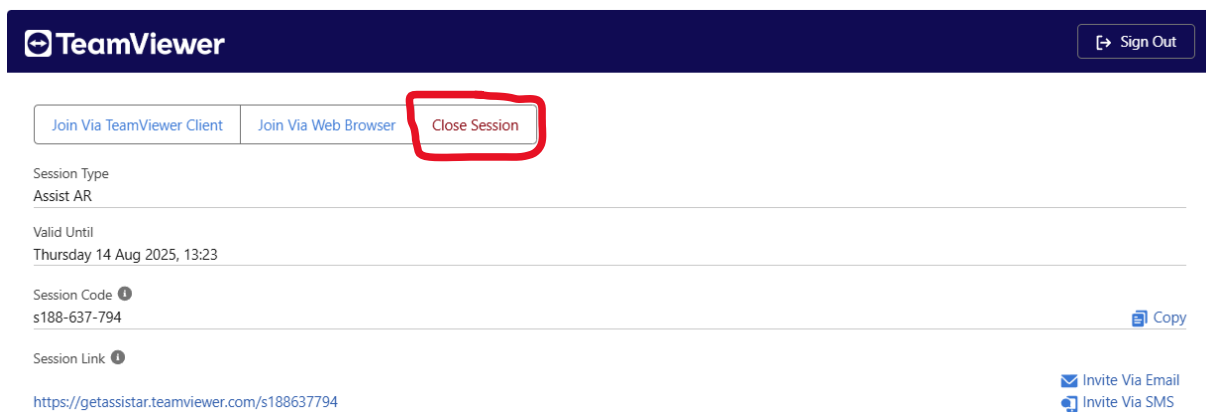


Figure 80

6. After closing the Assist AR session, it will be look like as in following figure.

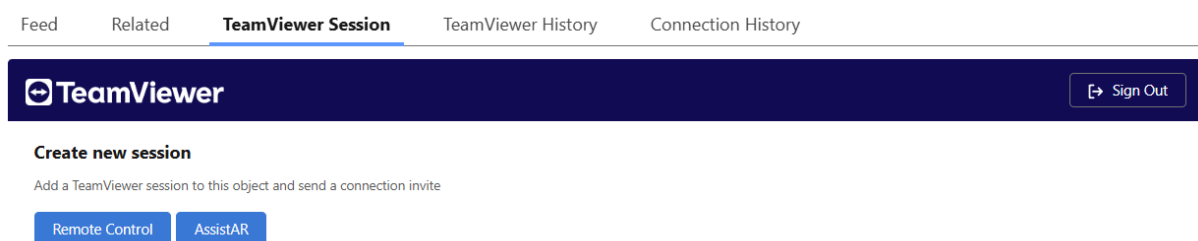


Figure 81

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.

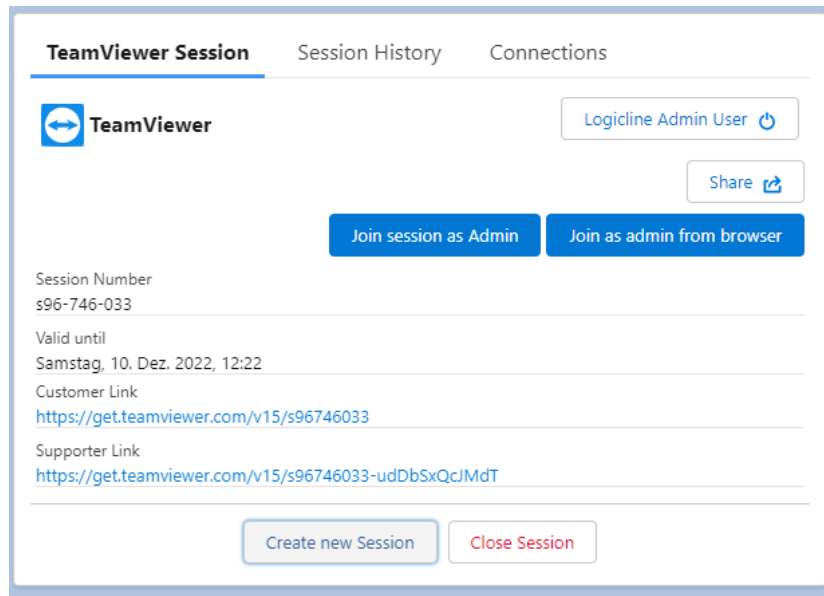


Figure 82

- 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.

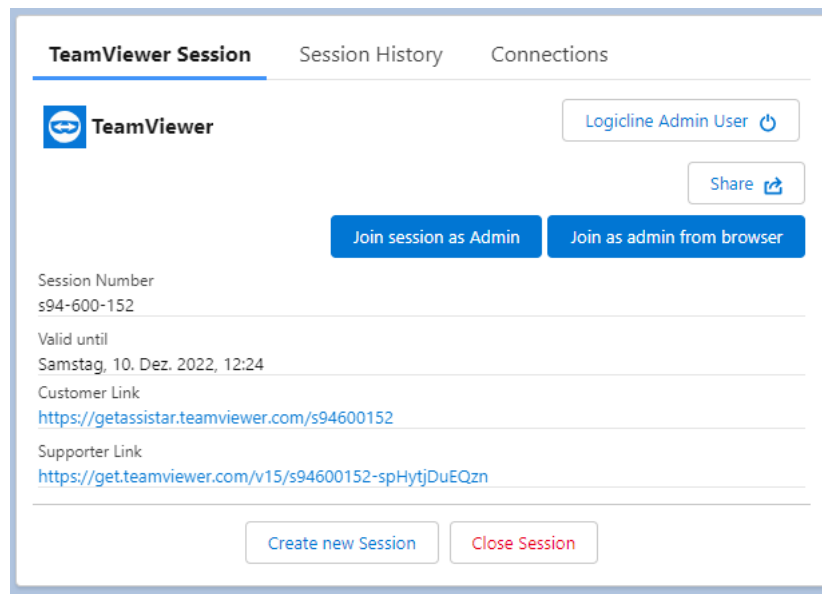


Figure 83

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.

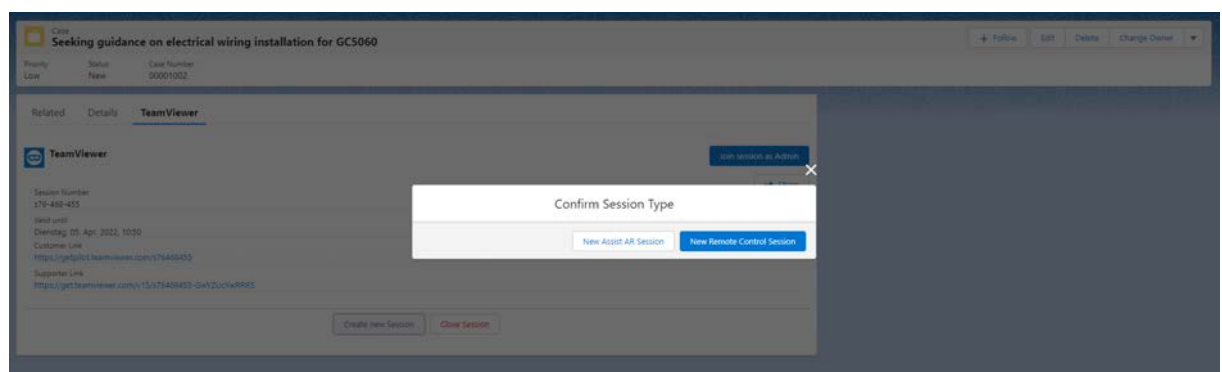


Figure 84

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.



Feed

Related

TeamViewer Session

TeamViewer History

Connection History

Search by type, state, code or session/supporter link

s187-620-526

Created

Wednesday 13 Aug 2025, 13:28

Valid Until

Thursday 14 Aug 2025, 13:28

Type

Remote Control

State

Open

Session Link

<https://get.teamviewer.com/v15/s187620526>

Supporter Link

<https://get.teamviewer.com/v15/s187620526-k4TjsQ4HCiS>

s188-637-794

Created

Wednesday 13 Aug 2025, 13:23

Valid Until

Thursday 14 Aug 2025, 13:23

Type

Assist AR

State

Closed

Session Link

<https://getassistar.teamviewer.com/s188637794>

Supporter Link

<https://get.teamviewer.com/v15/s188637794-JyBTstnmLygq>

Figure 85

- 2) The History tab lists all the sessions with its details like
 - a. Created
 - b. Valid until
 - c. Type
 - d. State
 - e. Session Link
 - f. Supporter link

4.7 Connection History

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

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

Feed

Related

TeamViewer Session

TeamViewer History

Connection History

Session code

View all connections

Session Code	Type	DeviceId	Device Name	Supporter	Start Date	End Date
1 N/A	Remote Control Unattended	619498258		Jennifer Stein	12 August 2025 at 14:35	12 August 2025 at 14:35
2 N/A	Remote Control Unattended	619498258		Jennifer Stein	12 August 2025 at 13:24	12 August 2025 at 13:27
3 s166-089-484	Remote Control	342516125		Jennifer Stein	12 August 2025 at 10:55	12 August 2025 at 10:57
4 s149-130-918	Assist AR	555393825		Jennifer Stein	11 August 2025 at 16:13	11 August 2025 at 16:16
5 s166-758-475	Remote Control	342516125		Jennifer Stein	11 August 2025 at 15:38	11 August 2025 at 15:39
6 s110-884-191	Remote Control	342516125		Jennifer Stein	11 August 2025 at 15:23	11 August 2025 at 15:25

Figure 87



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

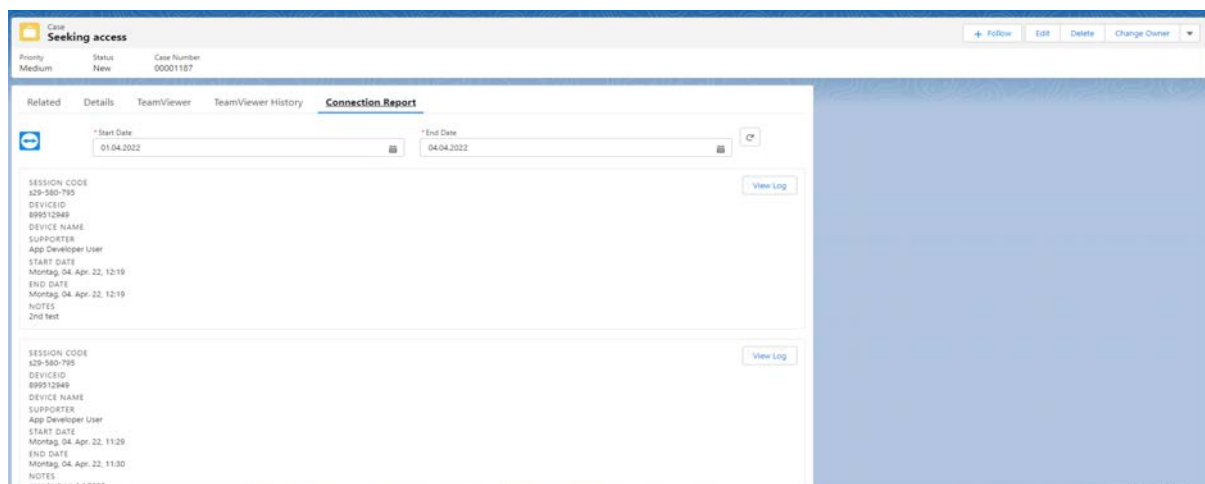


Figure 88

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.

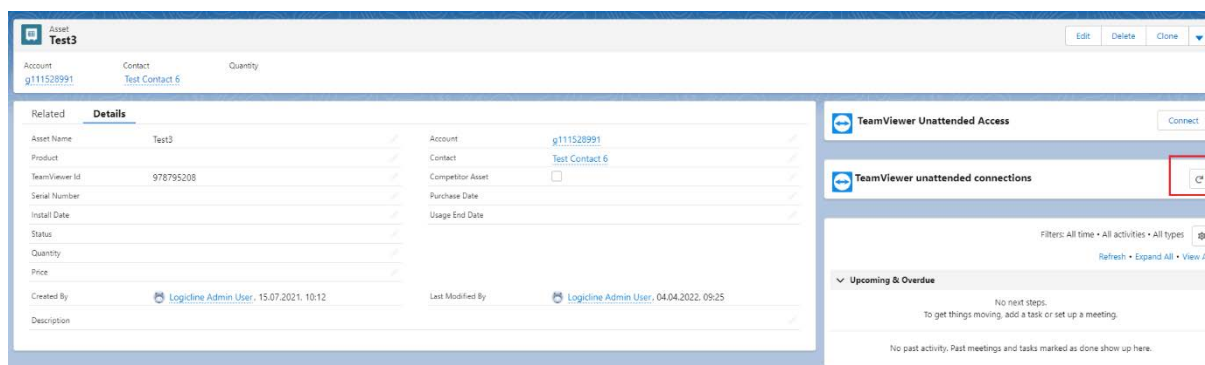


Figure 89

- 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.

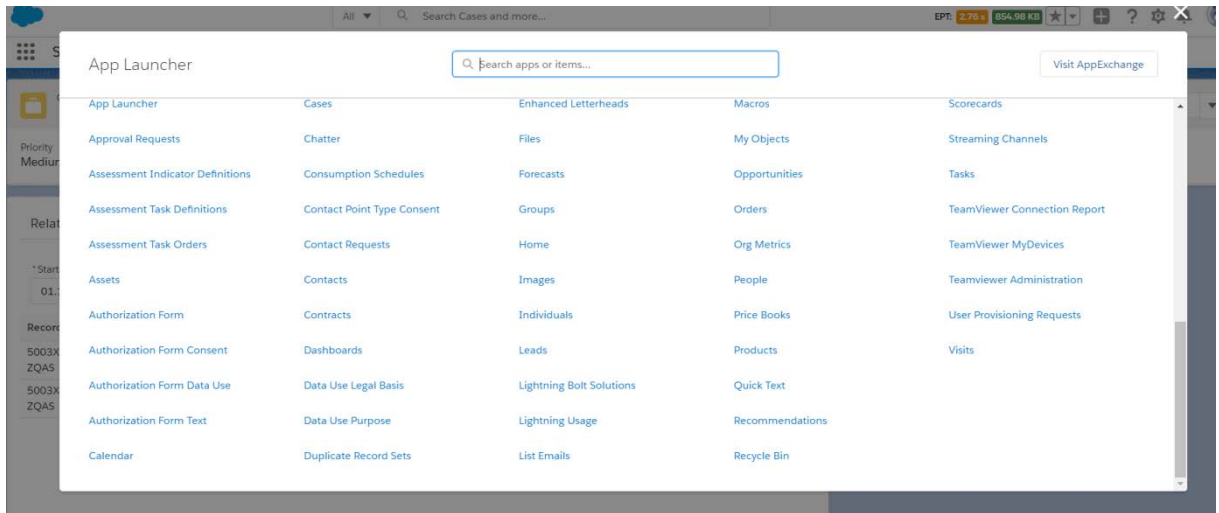


Figure 90

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

Record	Session Code	Type	DeviceId	Device Name	Supporter	Start Date	End Date	Notes	Recordings
1	Asset Dennis	N/A	Remote Control Unattended	1348806408	1348806408	App Developer User	17. Oktober 2024 um 12:12	17. Oktober 2024 um 12:12	Dennis device test via partner ID
2	Asset Dennis	N/A	Remote Control Unattended	1348806408	1348806408	App Developer User	17. Oktober 2024 um 12:10	17. Oktober 2024 um 12:10	Dennis device test 1
3	Asset Dennis	N/A	Remote Control Unattended	1348806408	1348806408	App Developer User	15. Oktober 2024 um 20:55	15. Oktober 2024 um 20:56	Partner id test Oct 15 2024
4	Asset Dennis	N/A	Remote Control Unattended	1348806408	1348806408	App Developer User	15. Oktober 2024 um 20:17	15. Oktober 2024 um 20:17	test 2024 Oct 15
5	Asset Dennis	N/A	Remote Control Unattended	1348806408	1348806408	App Developer User	17. Oktober 2024 um 12:25	17. Oktober 2024 um 12:26	Dennis asset by normal user

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.

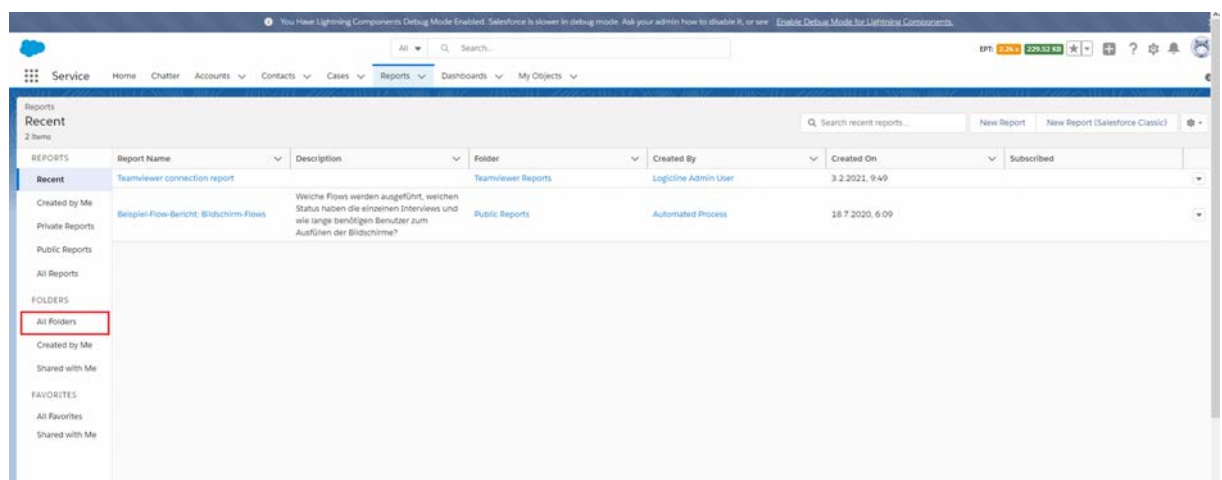


Figure 92

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

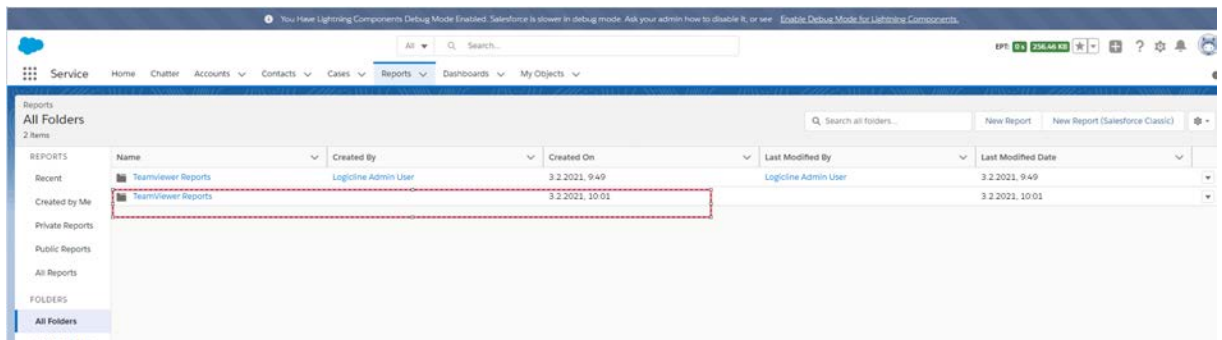


Figure 93

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

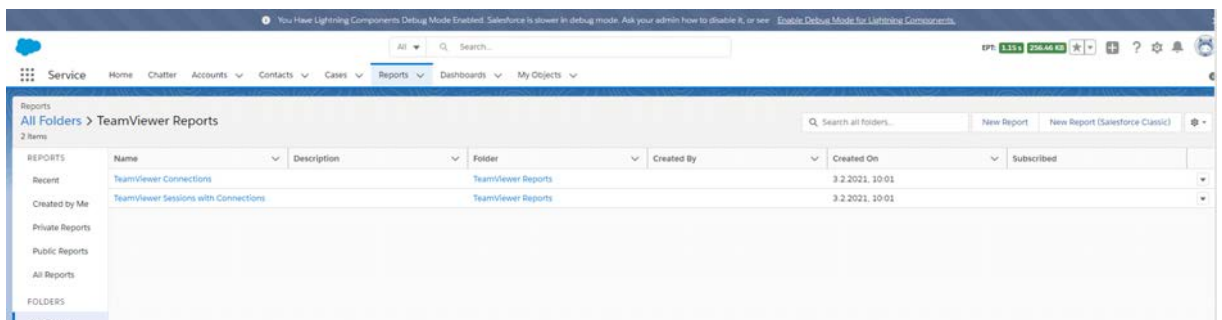


Figure 94

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

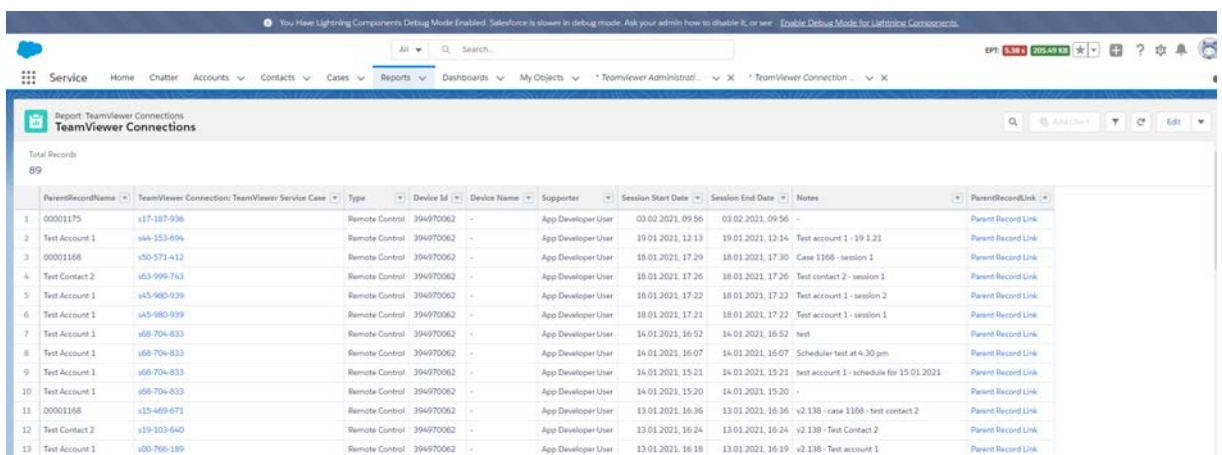


Figure 95

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



You Have Lightning Components Debug Mode Enabled. Salesforce is slower in debug mode. Ask your admin how to disable it, or see [Enable Debug Mode for Lightning Components](#).

Service Home Chatter Accounts Contacts Cases Reports Dashboards My Objects TeamViewer Administration TeamViewer Connection

Report: TeamViewer Sessions with Connections
TeamViewer Sessions with Connections

Total Records: 299

Service Case	Customer Name	Duration	Notes	Session Start Date	Session End Date	Supporter	ParentId	Parent Record Name	ParentRecordLink
s00-766-189 (1)		00:00:23	v2.138 - Test account 1	13.01.2021, 16:18	13.01.2021, 16:19	App Developer User	0013X000031ALXpQAO	Test Account 1	Parent Record Link
s00-899-307 (1)	Contact Classic Normal Dec 16	-	-	-	-	-	0033X00002wAnDQAU	Contact Classic Normal Dec 16	Parent Record Link
s00-910-169 (1)	My Opp	-	-	-	-	-	0063X000019BAedQAG	My Opp	Parent Record Link
s00-966-074 (1)		00:00:08	Case test 1	14.10.2020, 15:13	14.10.2020, 15:13	App Developer User	5003X00001yTf8mQAG	00001161	Parent Record Link
s01-471-866 (1)	Test Account 1	00:00:17	Comment on October 14, 2020 Account test 1	14.10.2020, 14:46	14.10.2020, 14:46	App Developer User	0013X000031ALXpQAO	Test Account 1	Parent Record Link
s01-561-028 (1)	Abhilash Soman	-	-	-	-	-	0033X00002wWbuQAE	Abhilash Soman	Parent Record Link
s01-671-633 (1)	Test Account 1	-	-	-	-	-	0013X000031ALXpQAO	Test Account 1	Parent Record Link
s01-942-266 (1)	Deepu Soman	-	-	-	-	-	0033X00003NecQAR	Deepu Soman	Parent Record Link
s01-942-249 (1)	Test Contact 1	-	-	-	-	-	0033X00003HdOPQAB	Test Contact 1	Parent Record Link
s02-612-222 (2)	Oppr Light Quick action	00:00:11	Oppr Light Quick action - same link - second time	24.10.2019, 15:59	24.10.2019, 15:59	App Developer User	0063X000010fjqQAC	Oppr Light Quick action	Parent Record Link
	Oppr Light Quick action	00:00:9	Oppr Light Quick action - success	24.10.2019, 15:50	24.10.2019, 15:50	App Developer User	0063X000010fjqQAC	Oppr Light Quick action	Parent Record Link
s02-697-895 (1)	Miriam Kunde Lücke	-	-	-	-	-	0033X00002MjwQAG	Miriam Kunde Lücke	Parent Record Link
s03-461-978 (1)	Teamviewer Account - May 13	00:00:20	connection test	07.09.2020, 14:50	07.09.2020, 14:50	App Developer User	0013X00002hyFQgQAM	Teamviewer Account - May 13	Parent Record Link
s04-055-772 (1)	00001009	-	-	-	-	-	5003X00001HhSQAE	00001009	Parent Record Link
s04-095-929 (1)	-	-	-	-	-	-	0013X00002U0mQAH	Burlington Textiles Corp of America	Parent Record Link
s04-301-411 (1)	Bertha Bover	-	-	-	-	-	00Q3X00001BXQq4UAH	Bertha Bover	Parent Record Link
s04-350-658 (1)	Sample	-	-	-	-	-	0063X000019B6xQAS	Sample	Parent Record Link

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.

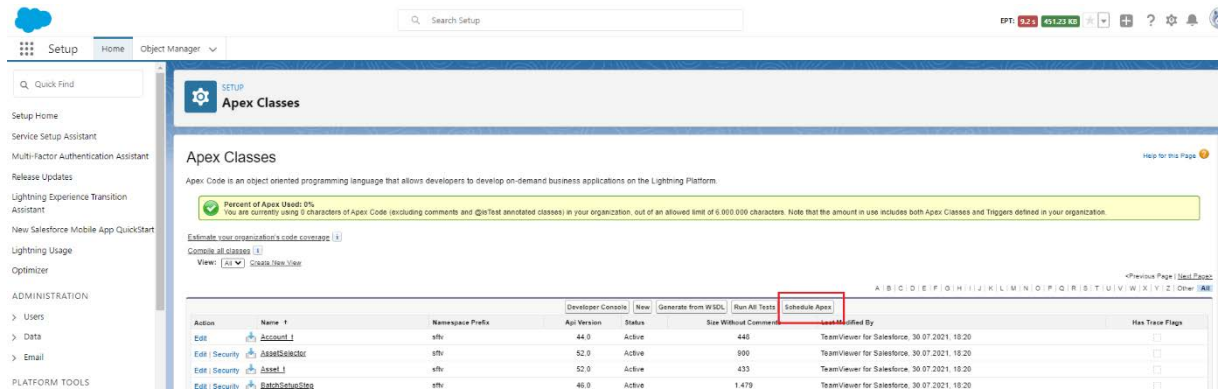


Figure 100

- c. In Schedule Apex page give the following
- Valid Apex name.
 - Select “UpdateConnectionReport” from Apex Class picklist.
 - Frequency – Weekly or monthly.
 - Start date.
 - End date.
 - Preferred time.
- d. Click on “Save” button.

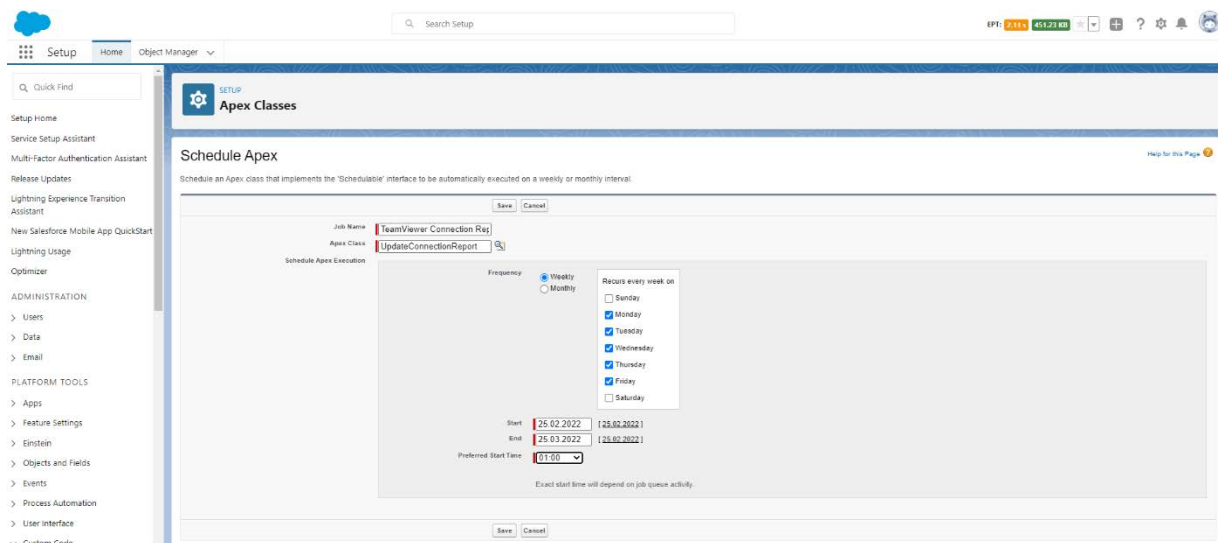


Figure 101

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

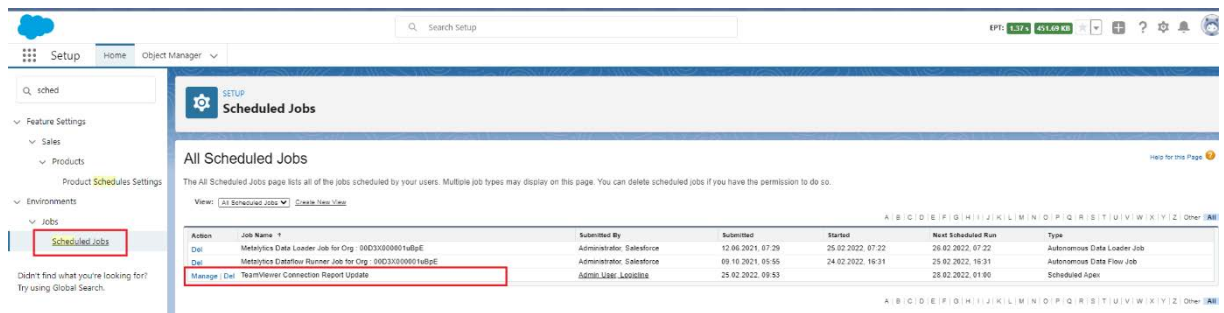


Figure 102

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.

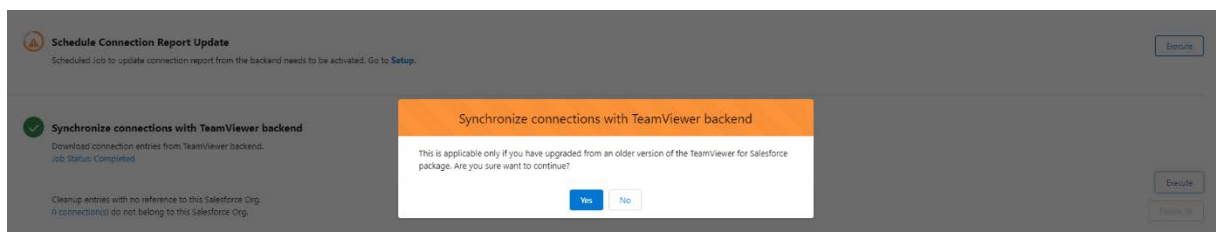


Figure 103

- 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.



LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
TeamViewer Connection	sftv__TeamViewer_Generic_Session_Detail__c	Custom Object	Store the Teamviewer session details and link that to parent record using Parent ID field.	08/02/2021	✓
TeamViewer Session	sftv__TeamViewerCase__c	Custom Object	This is a generic object to store the case details created in Teamviewer. Can be linked to any sales cloud and service cloud objects like Leads, Accounts, Contacts, Opportunities etc.	08/02/2021	✓
TeamViewer Session(Deprecated)	sftv__TeamViewer_Session_Detail__c	Custom Object		08/02/2021	✓

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.

New Process

Process Name * This field is required.

API Name * This field is required.

Description

The process starts when *

This field is required.

Cancel Save

Figure 105

- b. Click on “Save”.
- c. Select an object in the following screen, in our case **TeamViewer Session**.



Choose Object and Specify When to Start the Process

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:

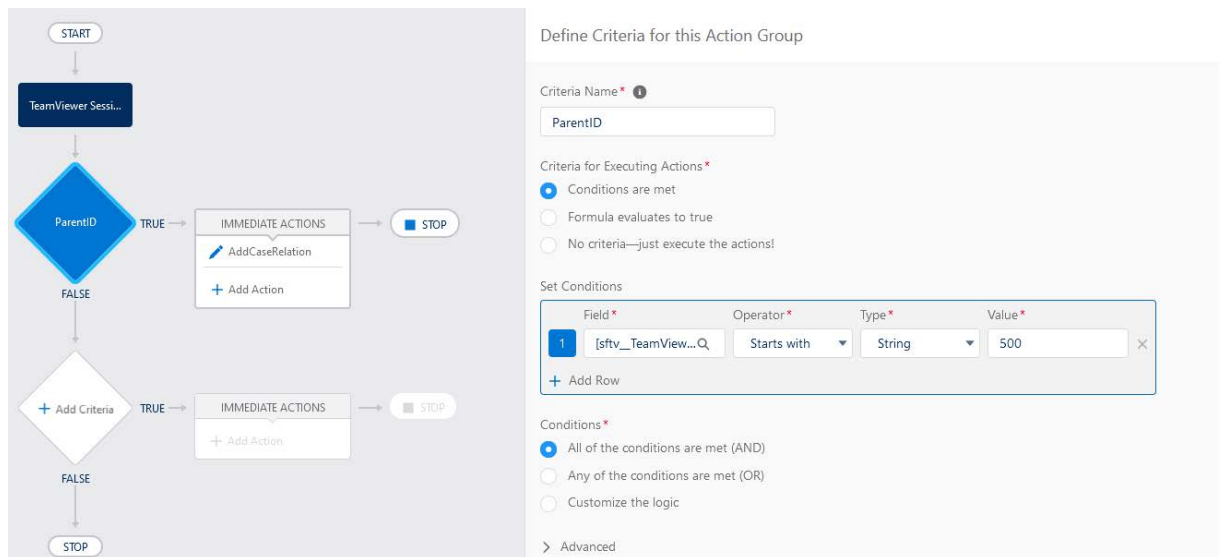


Figure 108

- f. In the flow diagram click on “immediate action” and set the following parameters:
- Criteria for updating the Records: No Criteria
 - Field: select the field that was introduced in Step one to the session object
 - Type: Formula
 - Value: [sftv__TeamViewerCase__c].sftv__ParentId__c

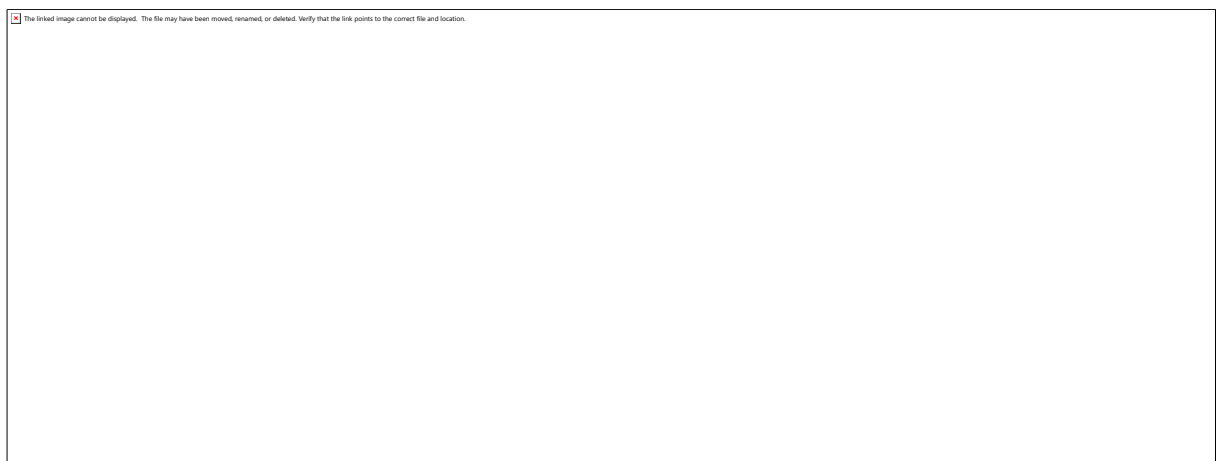


Figure 109

- 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.

New Custom Report Type

Step 1. Define the Custom Report Type

Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type.
 Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object: Cases

Identification

Report Type Label: TVsessionsAndCases

Report Type Name: TVsessionsAndCases ⓘ

Description: Showing linked data between Teamviewer session and salesforce cases

Note: Description will be visible to users who create reports.

Store in Category: Other Reports

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status: ☒ In Development ☐ Deployed

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”



New Custom Report Type TVsessionsAndCases

Step 2. Define Report Records Set

This report type will generate reports about Cases. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Cases
Primary Object

B TeamViewer Sessions
 A to B Relationship:
☐ Each "A" record must have at least one related "B" record.
☒ "A" records may or may not have related "B" records.
 (Click to relate another object)

Figure 111

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

Report Types

Legend:

- Not in Page Layout
- Used in Page Layout
- Selected
- Checked by Default
- Added via Lookup

Views:

TeamViewer Sessions Fields

Add fields related via lookup

Case	Created By	Created Date	Customer Email	Customer Link	Group ID	Is Active	Is First Seen	Last Modified	Owner	Parent Record	Priority	Subject	Supporter Link	Customer Name	Web Name
Case	Created By	Created Date	Customer Email	Customer Link	Group ID	Is Active	Is First Seen	Last Modified	Owner	Parent Record	Priority	Subject	Supporter Link	Customer Name	Web Name

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.

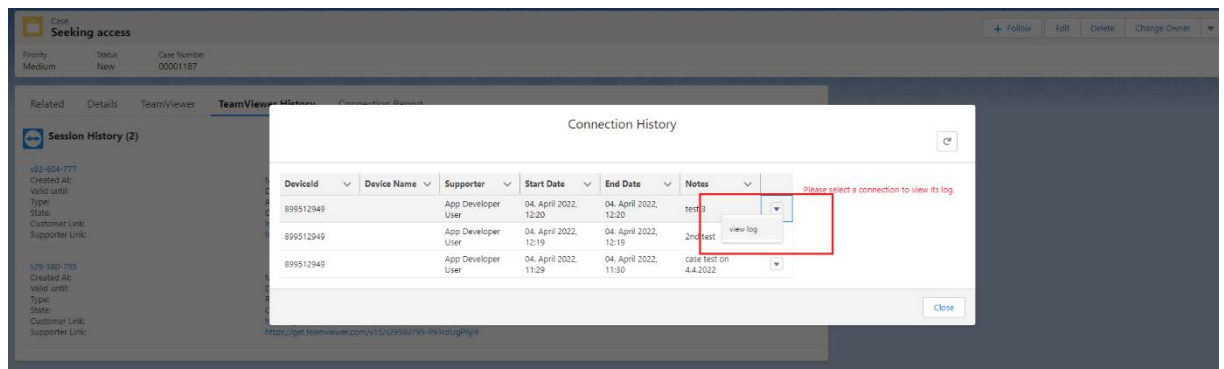


Figure 113

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.

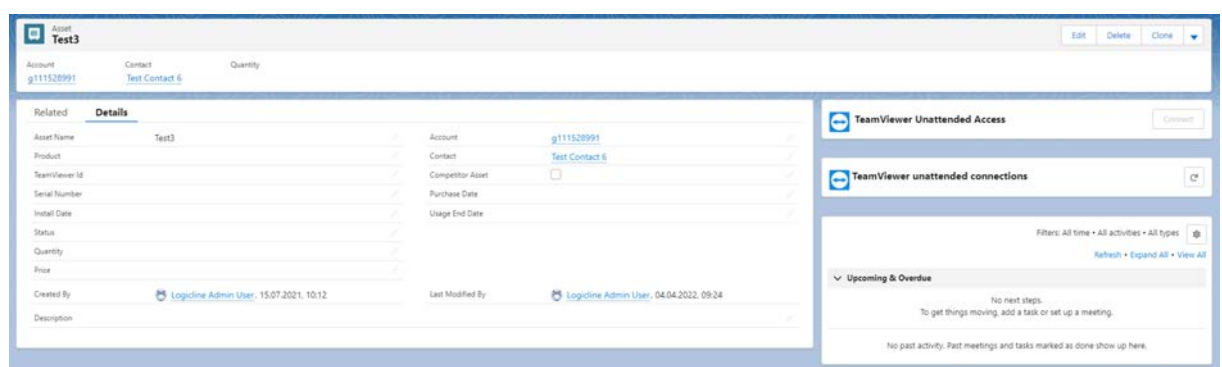


Figure 115

- 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.

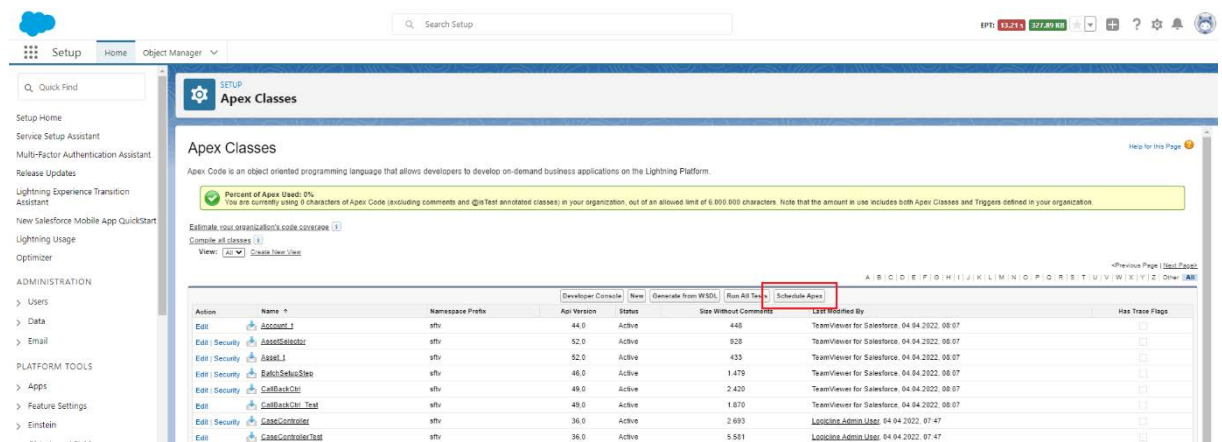


Figure 118

- 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.

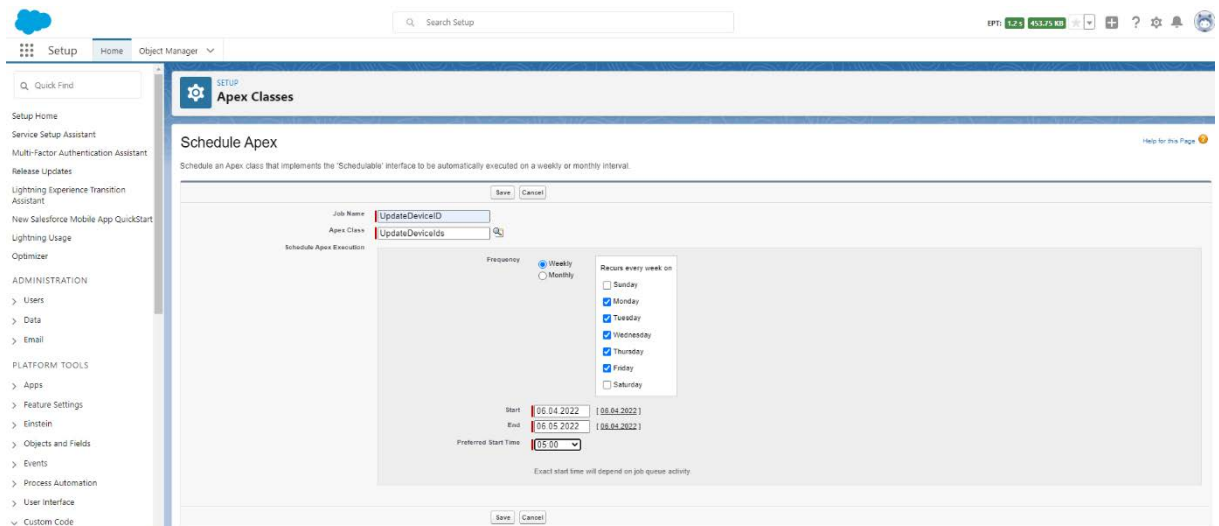


Figure 119

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

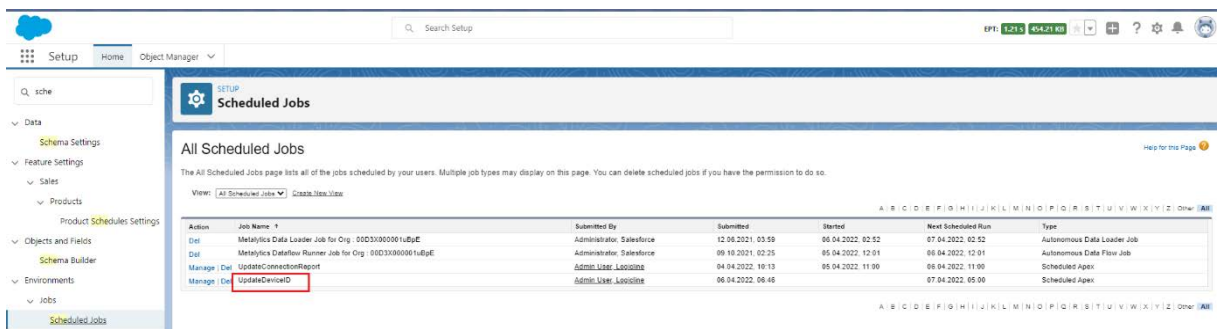


Figure 120

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

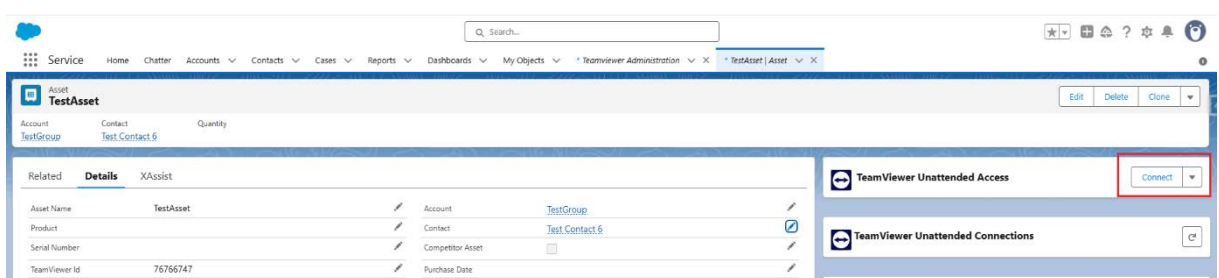


Figure 121

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

- deviceId = TeamViewerId
- thirdPartyname = tv.salesforce
- 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.

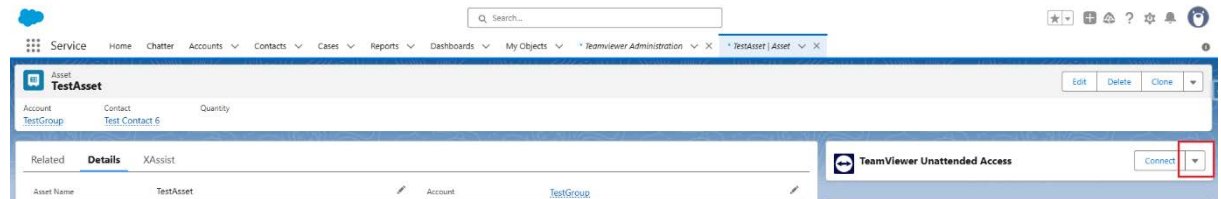


Figure 122

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

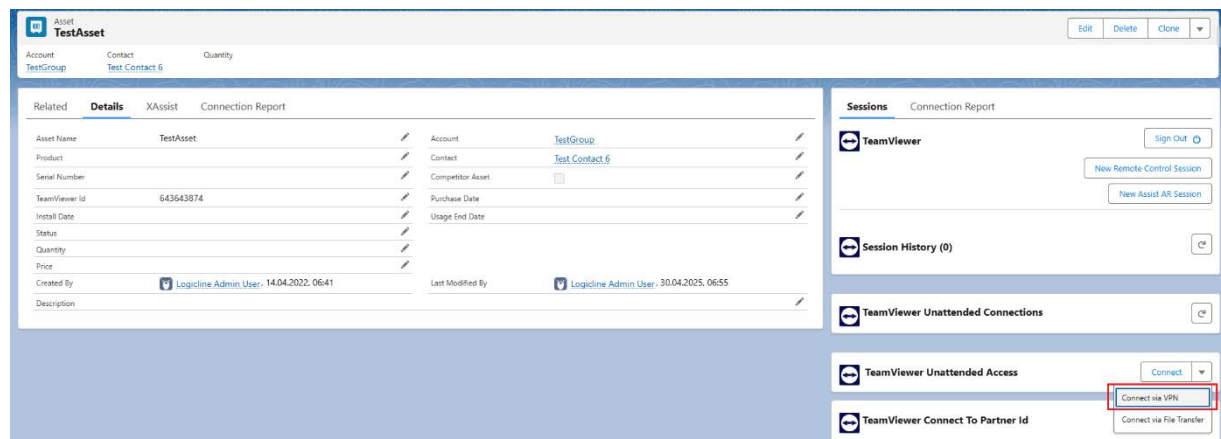


Figure 123

- 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.

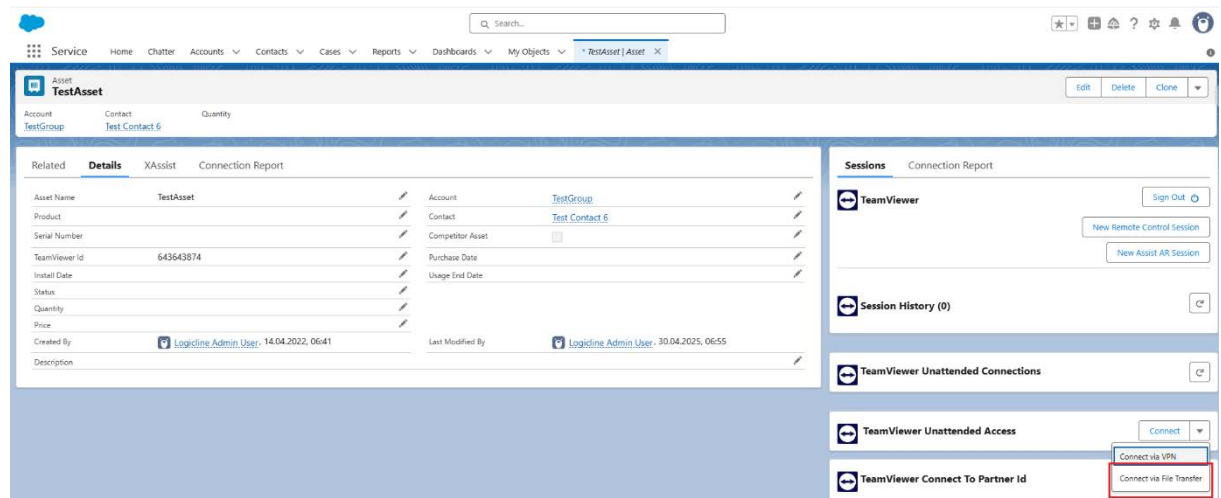


Figure 124



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.

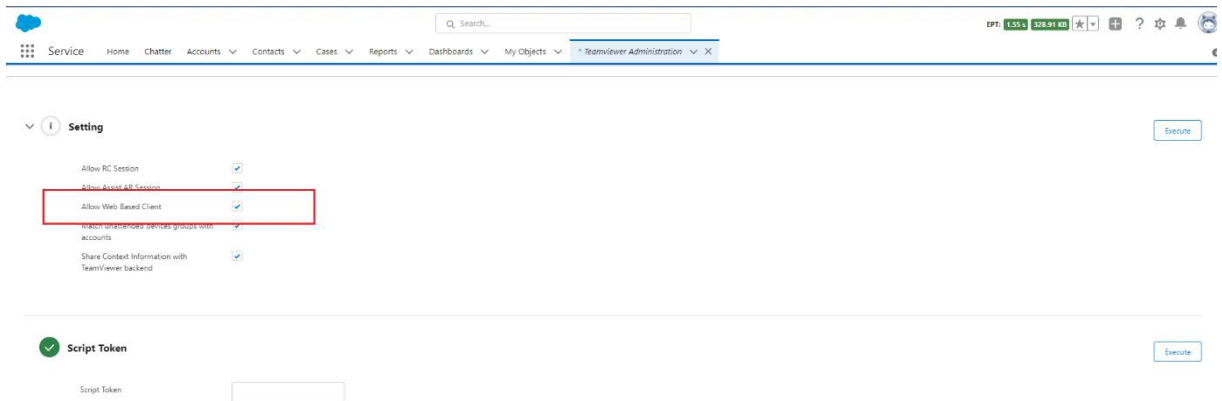


Figure 125

- 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”.

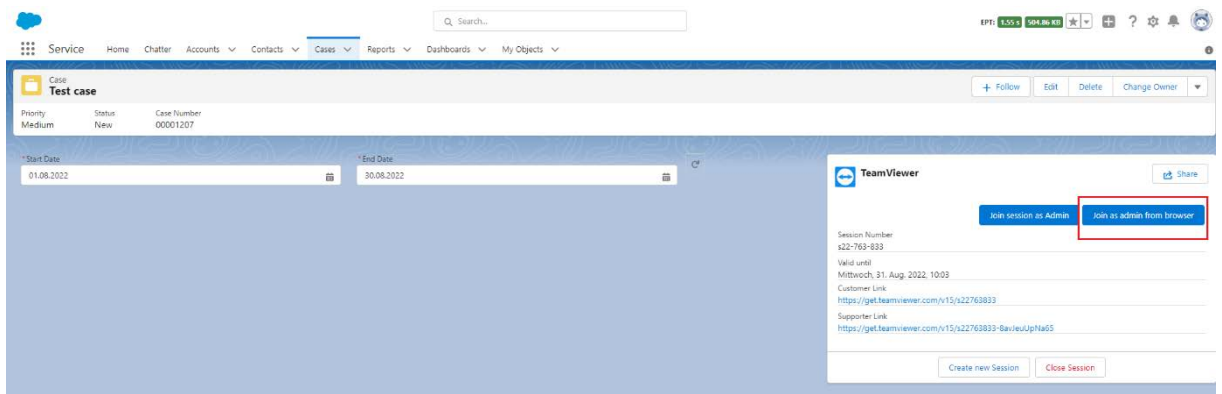


Figure 126

- 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.

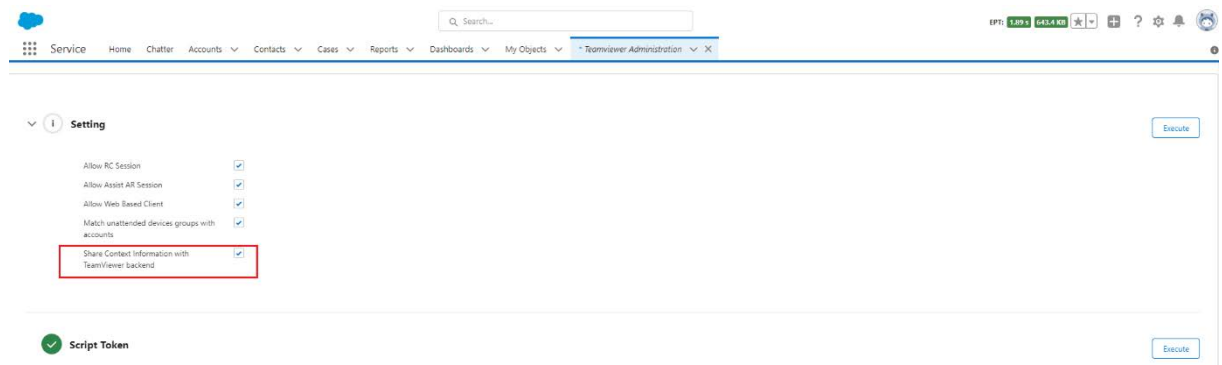


Figure 127

- 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 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

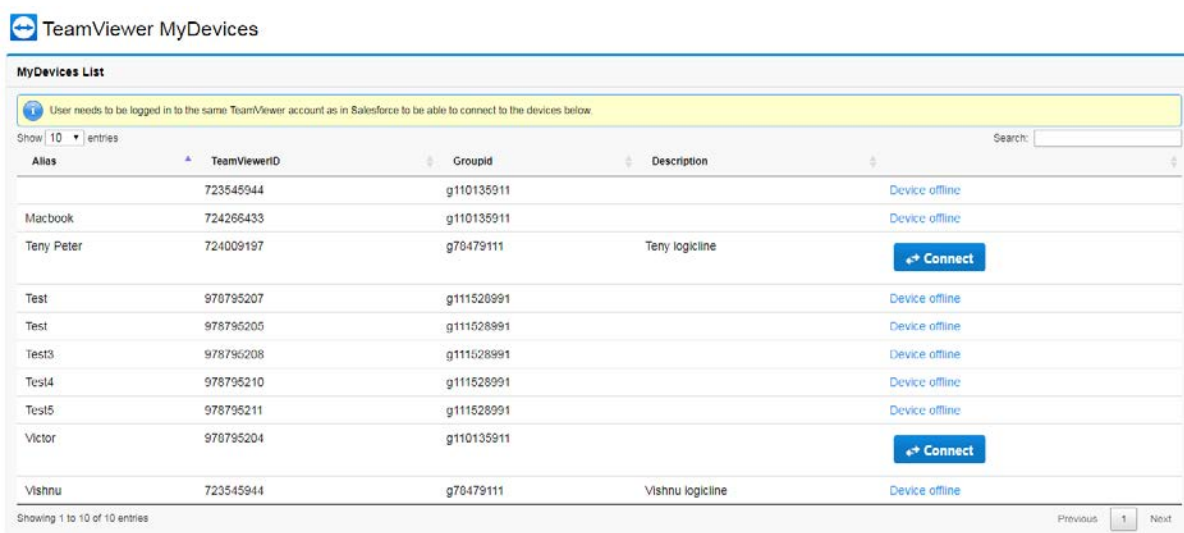


Figure 142

4.15 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.

4.15.1 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



Apps

[Help for this Page](#)

An app is a group of tabs that work as a unit to provide functionality. Users can switch between apps using the Force.com app drop-down menu at the top-right corner of every page.

You can customize existing apps to match the way you work, or build new apps by grouping standard and custom tabs.

Custom apps work in conjunction with User Profile Tab Visibility settings. [View User Profiles now.](#)

Action	App Label	Console	Custom	Description
Edit	App Launcher	☐	☐	App Launcher tabs
Edit	Community	☐	☐	Salesforce CRM Communities
Edit	Content	☐	☐	Salesforce CRM Content
Edit Del	Force.com	☐	☒	Start Here
Edit	Marketing	☐	☐	Best-in-class on-demand marketing automation
Edit	Platform	☐	☐	The fundamental Force.com platform
Edit	Sales	☐	☐	The world's most popular sales force automation (SFA) solution
Edit	Salesforce Chatter	☐	☐	The Salesforce Chatter social network, including profiles and feeds
Edit	Sample Console	☒	☐	(Salesforce Classic) Lets agents work with multiple records on one screen
Edit	Service	☐	☐	Manage customer service with accounts, contacts, cases, and more
Edit	Site.com	☐	☐	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content and published sites.

Subtab Apps

Action	App Label	Description
Edit	Profile (Others)	The tabs displayed when users view someone else's profile
Edit	Profile (Self)	The tabs displayed when users view their own profile

Connected Apps

No Apps found.

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.

Account Detail

Account Owner: [John Merson \(Channel\)](#)

Account Name: [Dickenson plc](#) [View Hierarchy](#)

Parent Account: [Dickenson plc](#)

Account Number: C0634267

Account Site: [Dickenson plc](#)

Type: Customer - Channel

Industry: Consulting

Annual Revenue: 50 000 000 €

Billing Address: 1301 Hoch Drive, Lawrence, KS 66048, USA

Created By: [John Merson](#) 22/6/2017 3:24 PM

Description:

Rating: (785) 241-6200

Phone: (785) 241-6200

Fax: (785) 241-6201

Website: [http://dickenson-consul.com](#)

Ticker Symbol: Private

Ownership: Private

Employees: 120

SIC Code: 6752

Shipping Address: 1301 Hoch Drive, Lawrence, KS 66048, USA

Last Modified By: [John Merson](#) 22/6/2017 3:24 PM

Contacts

New Contact | Merge Contacts

Action	Contact Name	Title	Email	Phone
Edit Del	Andy Young	SVR Operations	a_young@dickenson.com	(785) 241-6200

Interaction Log

Name: [None](#)

Subject: [None](#)

Related To: Account: [Dickenson plc](#)

Save Log | Save & New Log | Clear Log

Enter your notes here...

TV Session Notification

Figure 148

4.15.2 Enable TeamViewer notification in Salesforce lightning

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

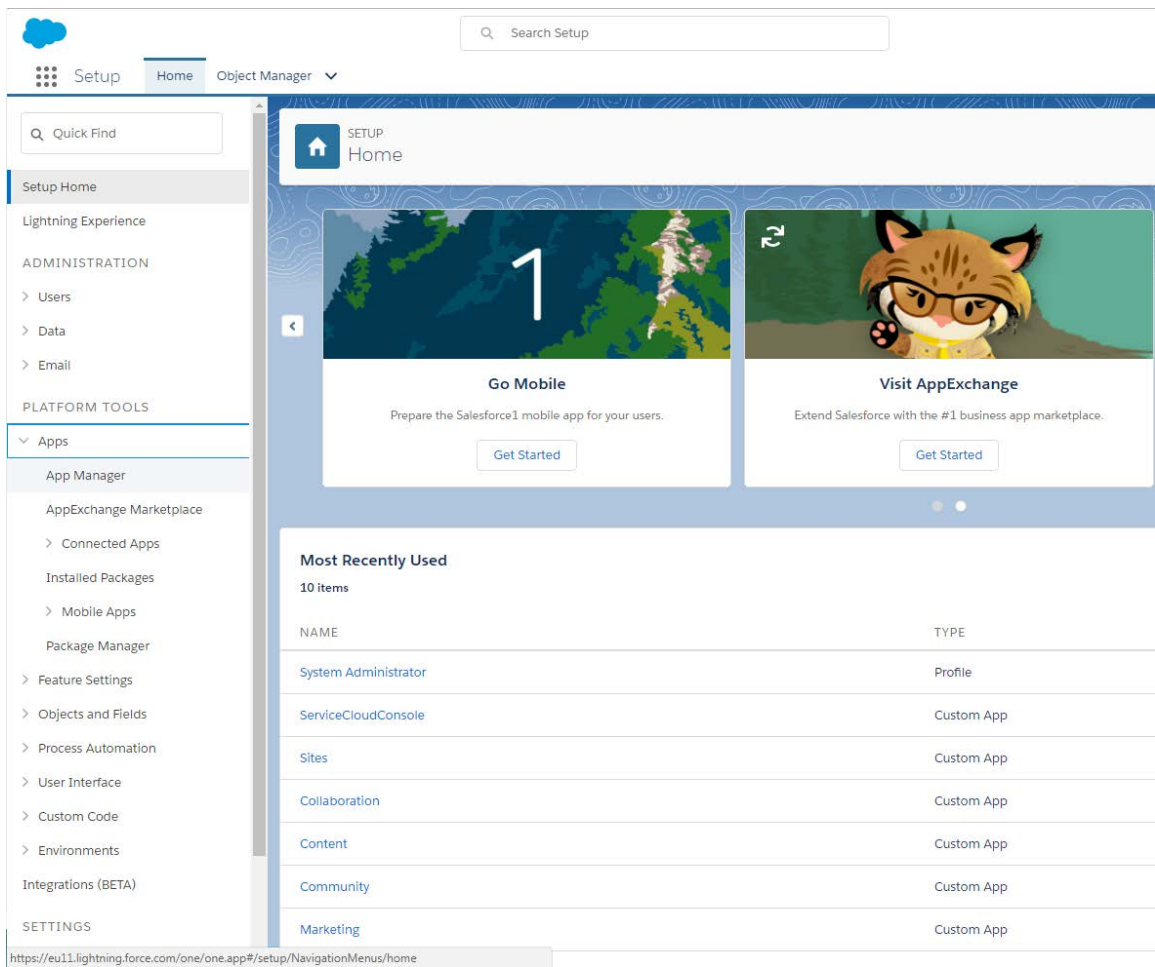


Figure 149

- 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.

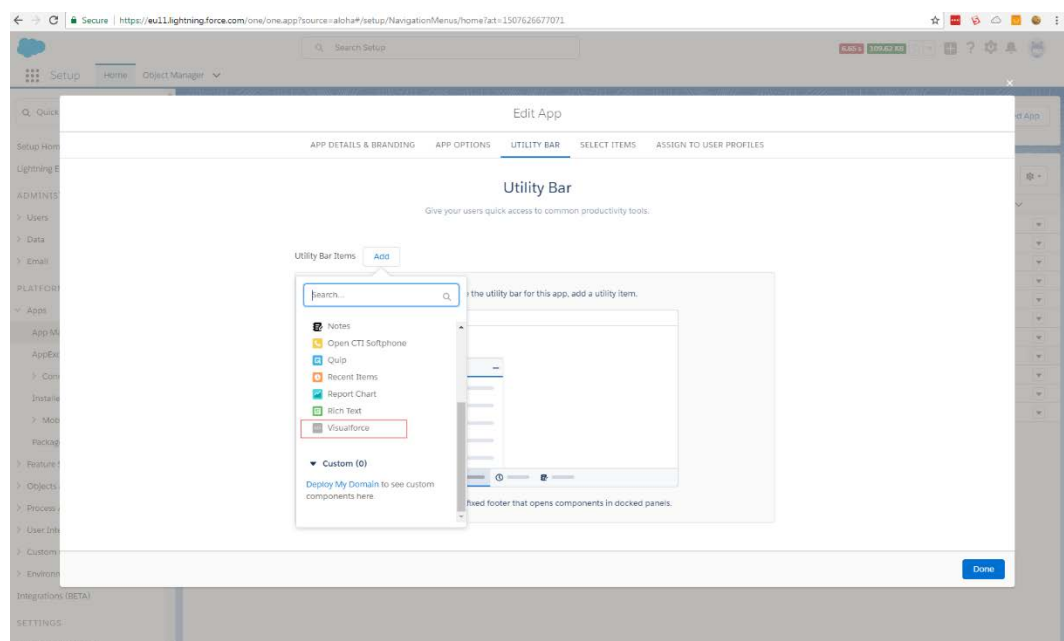


Figure 150



- 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.

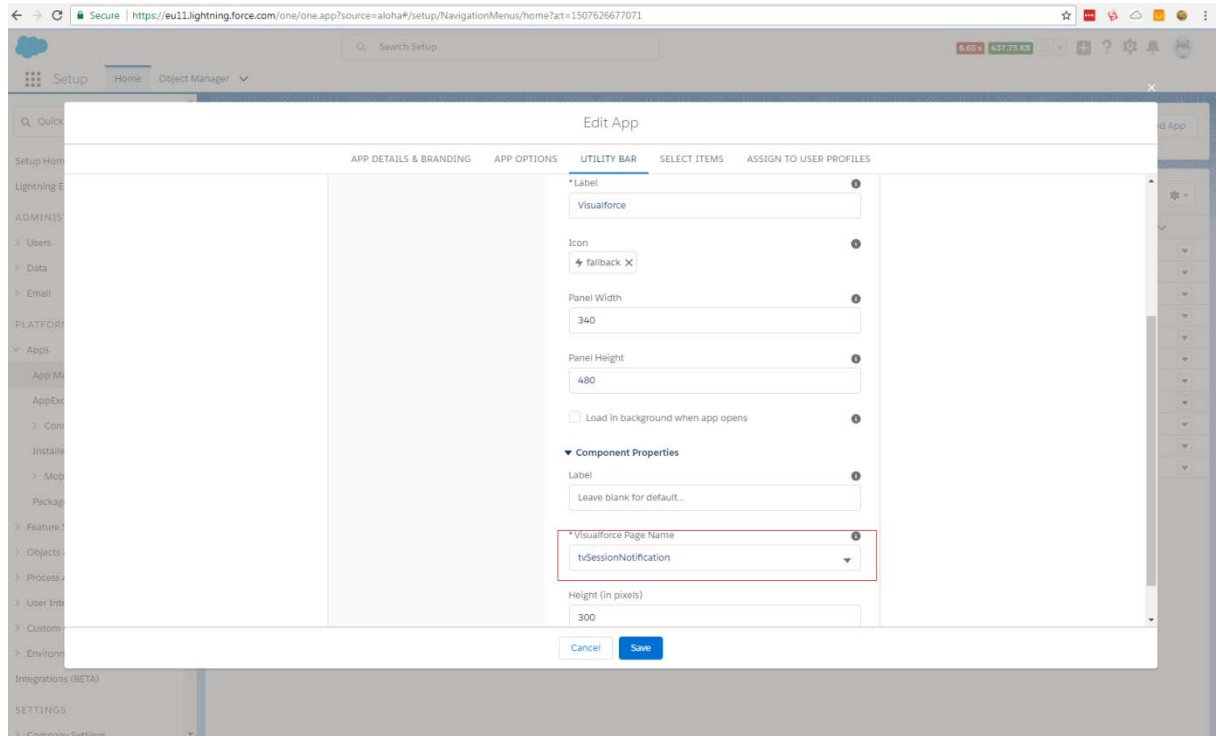


Figure 151

4.16 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.

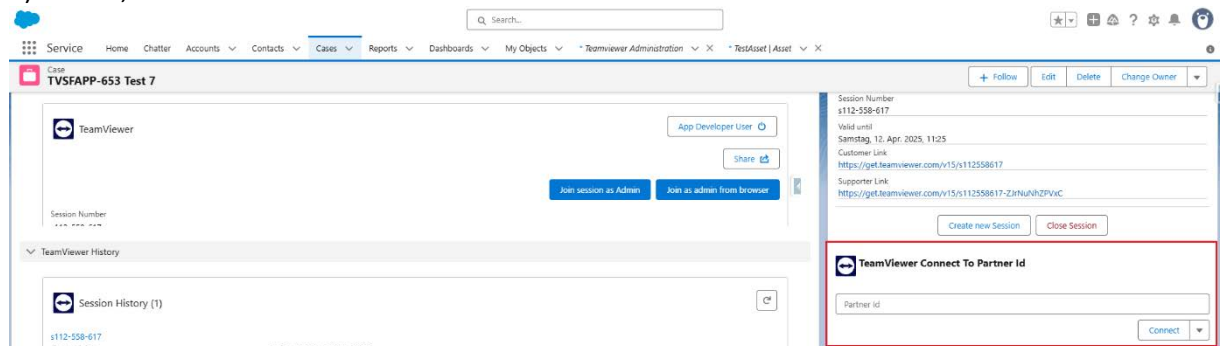


Figure 152

- 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”.

4.16.1 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.

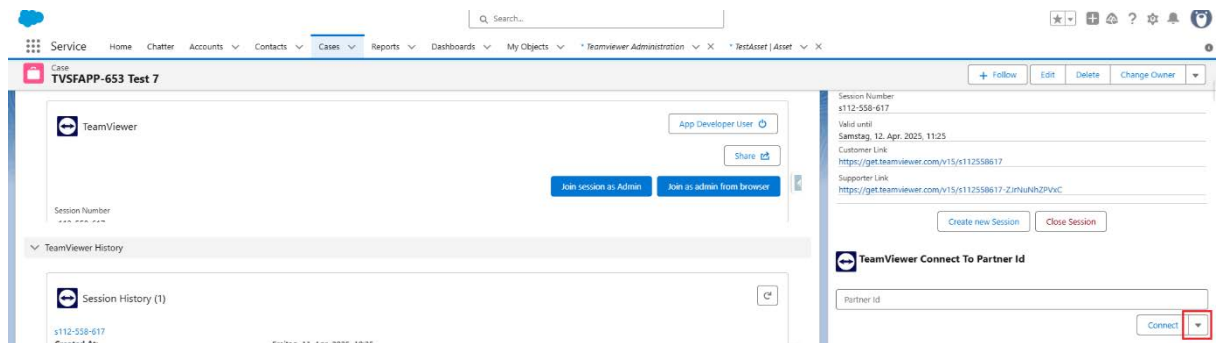


Figure 153

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

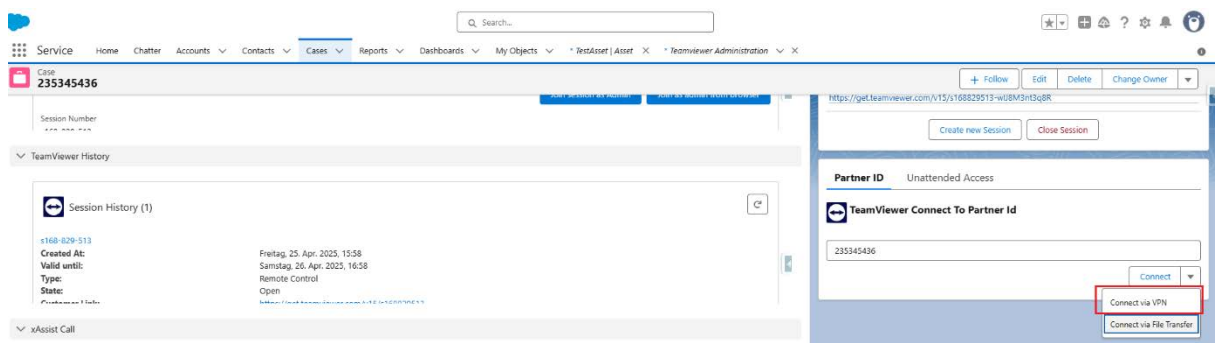


Figure 154

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

4.16.2 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.

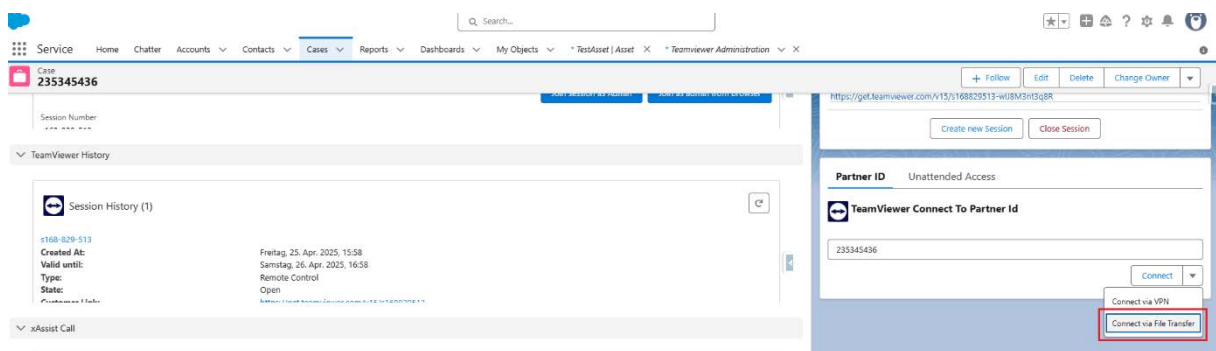




Figure 155

4.16.3 Connect to Partner ID on Case

In normal case Connect to Partner ID in Case 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 if 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 overrides the settings in Administration page.

4.17 Support for Experienced Cloud

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

4.17.1 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”.

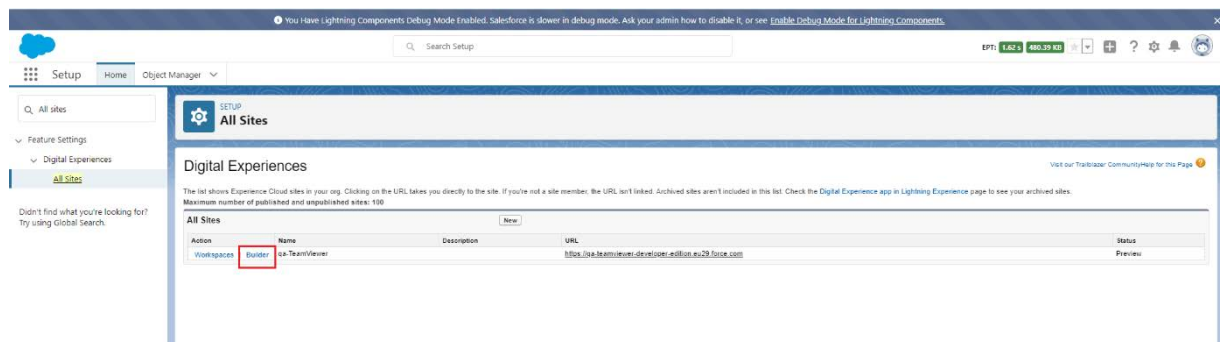


Figure 156

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

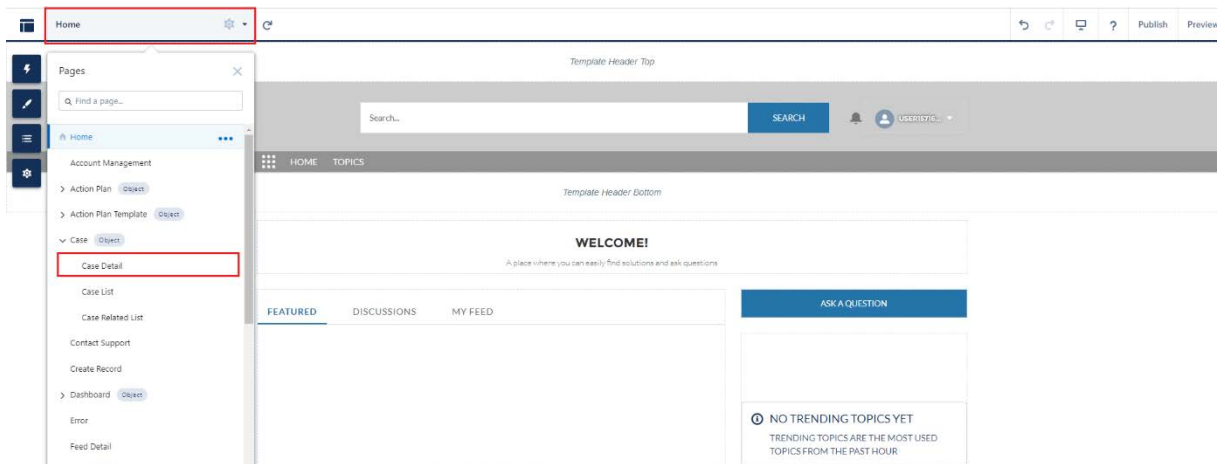


Figure 157

5) Click on the lightning icon.

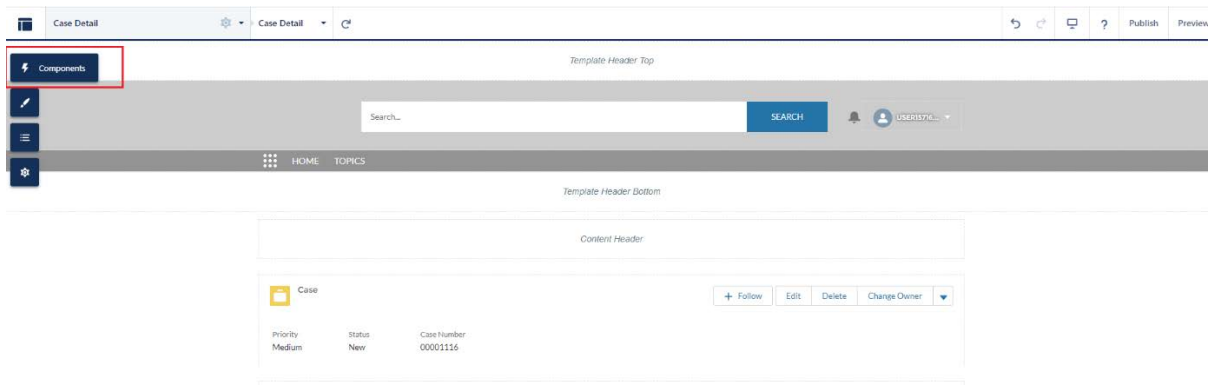


Figure 158

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

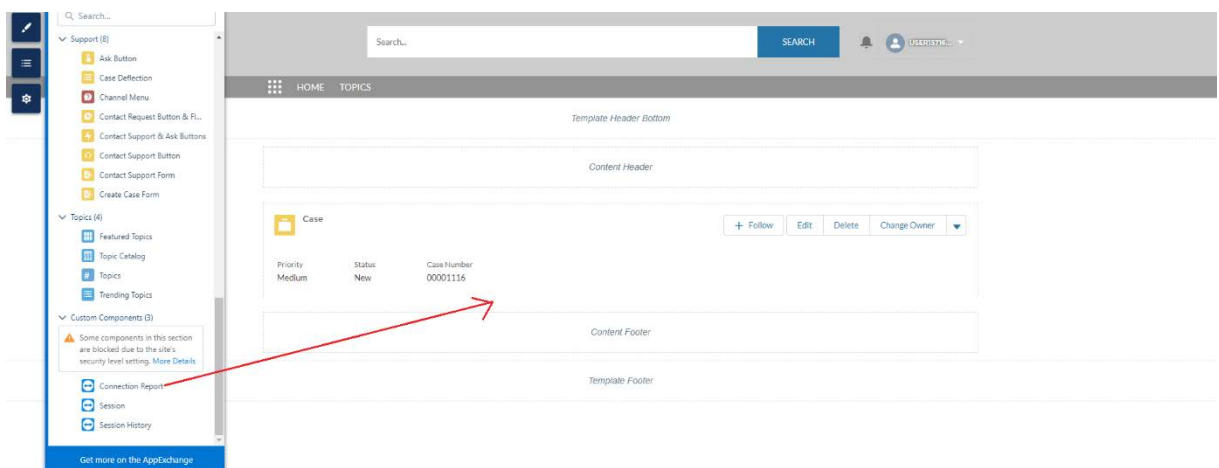


Figure 159

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

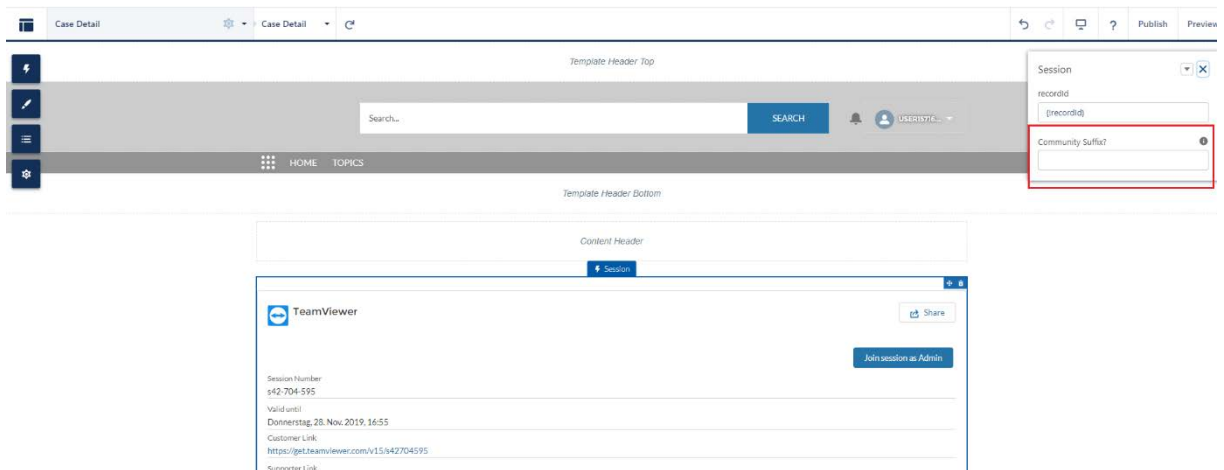


Figure 160

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.

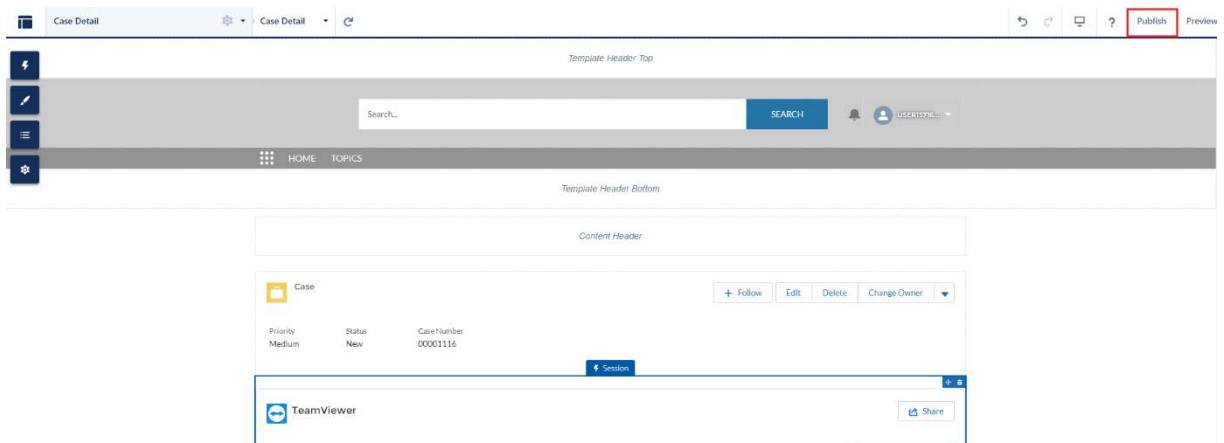


Figure 161

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

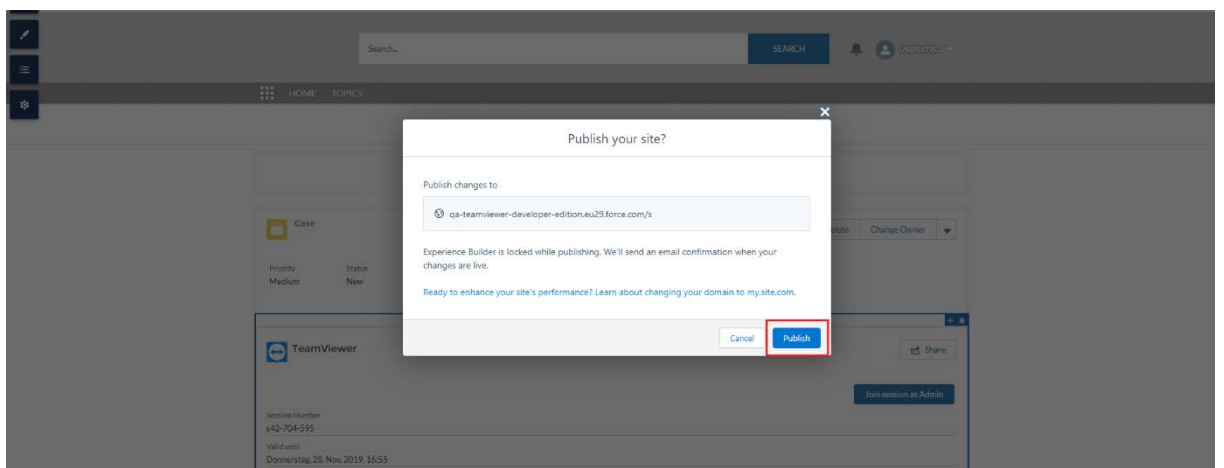


Figure 162



4.17.2 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.

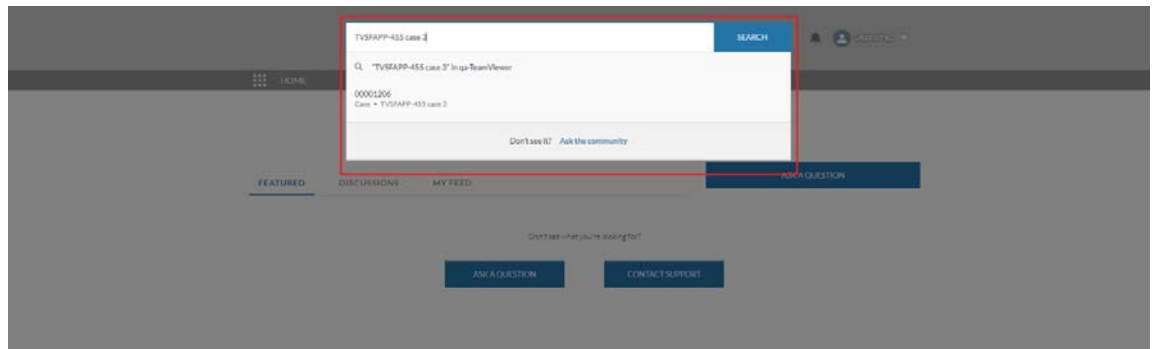


Figure 163

- 3) It will load the corresponding record.

Case

TVSFAPP-455 case 3

[+ Follow](#)
[Edit](#)
[Delete](#)
[Change Owner](#)

Priority

Medium

Status

New

Case Number

00001206

TeamViewer

[Join session as Admin](#)
[Join as admin from browser](#)

Session Number

s21-917-415

Valid until

Dienstag, 30. Aug. 2022, 16:37

Customer Link

<https://get.teamviewer.com/v15/s21917415>

Supporter Link

<https://get.teamviewer.com/v15/s21917415-1TemW5FFyJn>

Create new Session

Close Session

Session History (2)

s21-917-415

Created At:

Montag, 29. Aug. 2022, 16:37

Valid until:

Dienstag, 30. Aug. 2022, 16:37

Type:

Remote Control

State:

Open

Customer Link:

<https://get.teamviewer.com/v15/s21917415>

Supporter Link:

<https://get.teamviewer.com/v15/s21917415-1TemW5FFyJn>

s67-633-717

Created At:

Montag, 29. Aug. 2022, 16:24

Valid until:

Dienstag, 30. Aug. 2022, 16:24

Type:

Remote Control

State:

Closed

Customer Link:

<https://get.teamviewer.com/v15/s67633717>

Supporter Link:

<https://get.teamviewer.com/v15/s67633717-HO1nFRL84xGR>

* Start Date

01.08.2022

* End Date

30.08.2022

	Session Code	Type	DeviceId	Device Name	Supporter	Start Date	End Date	Notes
1	s21-917-415	Remote Control	899512949		App Developer User	29. August 2022 um 16:38	29. August 2022 um 16:40	share on
2	s67-633-717	Remote Control	899512949		App Developer User	29. August 2022 um 16:26	29. August 2022 um 16:27	Note - no share
3	s67-633-717	Remote Control	899512949		App Developer User	29. August 2022 um 16:30	29. August 2022 um 16:30	

TeamViewer for Salesforce – Configuration Guide

<https://www.teamviewer.com/en/integrations/salesforce/>

Page 66/68



Figure 164

4.18 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.

Record	Session Code	Type	DeviceId	Device Name	Supporter	Start Date	End Date	Actions
1	00001040	s169-496-017	Assist AR	555393825	Nils Larcher	01 October 2025 at 15:21	01 October 2025 at 15:22	View Connection Details
2	00001067	N/A	Remote Control Unattended	619498258	Nils Larcher	30 September 2025 at 22:49	30 September 2025 at 22:50	View Connection Details
3	00001067	s112-997-633	Assist AR	1627700690	Nils Larcher	30 September 2025 at 22:48	30 September 2025 at 22:48	View Connection Details
4	00001067	s135-000-823	Remote Control	1680984340	Nils Larcher	30 September 2025 at 22:45	30 September 2025 at 22:46	View Connection Details

Figure 165

- 2) Click on “View Connection Details”.
- 3) A new tab is displayed with connection summary.

Connection Details

[Details](#)
[Event Log](#)
[Chat Log](#)
[Session Recording](#)
[Action Steps](#)

Session Type

Remote Control Unattended

End User's Email

unattended connection

Notes

Summary

End User

Duration

00:00:48

Supporter

Nils Larcher

The user granted remote access in TeamViewer and cleared the DNS cache using Command Prompt. They then accessed desktop properties via Windows Explorer and increased the maximum size setting to 51000 MB before saving the changes. These steps achieved both remote session setup and system configuration adjustments.

Close

Figure 166

Note: Insights will be displayed for Remote Control, Assist AR and Remote-Control Unattended Connections. To display the AI summaries/ Session Insights in an Assist AR Connection, enable the live captions during the connection. Summaries provided by the ai-summaries/session insights feature of a TeamViewer connection originating from a case is added to the case activity log.



Case

TVSFAPP-678

Created By

[Logicline Admin User](#), 30.04.2025, 13:42

Last Modified By

[Logicline Admin User](#), 30.04.2025, 13:42

Subject

TVSFAPP-678

Description

Internal Comments

Open Activities (0)

[New Task](#) [New Event](#)

Activity History (1)

[View All](#)

[View All](#)

Figure 167