TeamViewer

salesforce

TeamViewer Integrations for
Salesforce Sales Cloud and Service Cloud

The TeamViewer integration for Salesforce enables you to embed remote access and support functionalities into your Salesforce Sales Cloud and Service Cloud environments.

To stay competitive and successful, organizations must deliver an exceptional, seamless customer experience across sales and support for higher customer satisfaction and retention — whether engaging over the phone, through email, online, or on social media.

Resolve Issues Faster and Increase Customer Satisfaction

Essential for quickly resolving issues for customers, partners, and employees, the TeamViewer integration with Salesforce enables all the customer engagement contact points of an organization to remotely connect to customers' devices and support them throughout the entire journey from purchase to product usage, to issue resolution — significantly improving customer satisfaction.

- Out-of-the-box TeamViewer integration provides the full feature set, seamlessly embedded into the Salesforce environment (No training, coding, or developers to implement)

- Rich reporting and notification system for instant visibility into the history and status of support interactions

- Manage multiple customer support cases at the same time, across all Salesforce Sales and Service Cloud screens (Cases, Contacts, Accounts, Leads, and Opportunities)

- Share session information via Chatter or email using different email templates per screen and communication type

- Localized support for over 10 languages, TeamViewer is the only remote support integration available across all Salesforce subscription tiers: Essentials, Professional, Enterprise, and Unlimited

Figure 1: TeamViewer integration to Salesforce fully supports LX mode.

Solution Highlights

- **Cross-Platform Support**

  Remotely connect from virtually any type of device to any device, directly from Salesforce screens: Agents can create and/or join support sessions by clicking a button, and customers can join sessions by simply clicking a link.

- **Data-Driven Decisions**

  Get outgoing connection reports, and session data for specific customers, leads, or tickets, with advanced search and filtering features. Create reports to track lead conversion, ticket resolution time, and agent productivity to make data-driven decisions.

- **Instant Notifications**

  Get real-time notifications of users' online status to engage with one-click connections when they're available and handle multiple support sessions at the same time to maximize productivity.

- **One-click remote scripts**

  Use scripts to automate recurring processes to save time on routine tasks. Upload scripts for easy, convenient access during each session.
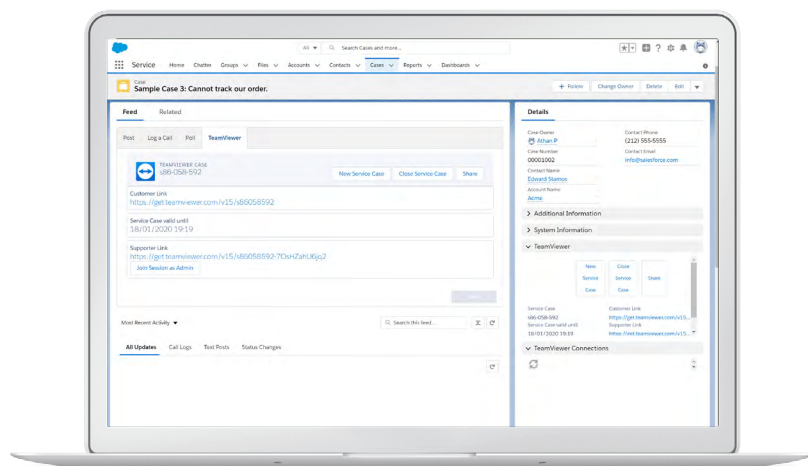
Key Benefits for Customers

Streamline Customer Outreach
Increase support agent productivity and empower presales teams to interact easily with prospects.

Create Intuitive Workflows
Customize the user interface (UI) and connection parameters to fit your company's requirements for seamless user interactions, reducing the need for more agent training sessions.

Give Instant Product Demos
Save time by launching 2-min live demo presentations on the fly, instead of describing how products work in 20-minute phone calls.

Key Benefits for Resellers

Increase Revenue
Increase your average revenue per deal by bundling Salesforce with TeamViewer, one of the most popular remote support add-ons for Salesforce Service Cloud.

Upsell Existing Customers
Reach out to existing customers and upsell the out-of-the-box integration for remote support capabilities, which is especially appealing to customers using multiple Salesforce products.

Add Value, without Overhead
Straightforward to activate, with full documentation and dedicated support channels for customers, end customers get clear added value with no additional overhead for resellers.

License Requirements and Recommended Bundles

To use the Salesforce integration, you must have a valid Salesforce subscription, plus a TeamViewer license (Premium, Corporate, or Tensor) with the TeamViewer Mobile Device Support Salesforce AddOn.

Recommended Bundles

Salesforce Subscription Tier	1-5 agents	6-20 agents	21-50 agents	51+ agents
Essentials	TeamViewer Premium subscription +Salesforce AddOn	TeamViewer Premium subscription +Salesforce AddOn		
Professional		TeamViewer Corporate subscription +5 AddOn Channels +Salesforce AddOn	TeamViewer Corporate subscription +9 AddOn Channels +Salesforce AddOn	
Enterprise		TeamViewer Corporate subscription +5 AddOn Channels +Salesforce AddOn	TeamViewer Corporate subscription +9 AddOn Channels +Salesforce AddOn	TeamViewer Tensor (custom pricing)
Unlimited			TeamViewer Tensor (custom pricing)	TeamViewer Tensor (custom pricing)

About TeamViewer

As a leading global remote connectivity platform, TeamViewer empowers users to connect anyone, anything, anywhere, anytime. The company offers secure remote access, support, control, and collaboration capabilities for online endpoints of any kind and supports businesses of all sizes to tap into their full digital potential. TeamViewer has been activated on approximately 2 billion devices; up to 45 million devices are online at the same time. Founded in 2005 in Göppingen, Germany, the company employs about 800 people in offices across Europe, the US, and Asia Pacific.

Resources

TeamViewer App for Salesforce Cloud

TeamViewer for Salesforce

Search our Partner Directory to find a local distributor to request a demo or purchase integration

Salesforce Integration User Guide

Webinar: Supercharge Your Customer Engagement and Support with TeamViewer Tensor Integrations