TeamViewer Integrations for

Salesforce Sales Cloud and Service Cloud

Introduction

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 chat channels.

The TeamViewer integration for Salesforce enables you to embed remote access and support functions as well as augmented reality (AR) remote assistance into your Salesforce Sales Cloud and Service Cloud environments.

Resolve Issues Faster and Increase Customer Satisfaction

Remote Access and Support

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 required to implement).

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

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

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

Augmented Reality Remote Assistance

TeamViewer Assist AR is a mobile application that B2C and B2B companies use to provide visual remote assistance powered by augmented reality. TeamViewer Assist AR helps visually identify problems and enables supporters to guide customers and frontline workers to speedy resolutions, saving time and money, significantly improving customer satisfaction.

- Expert remote supporters see on their desktop or mobile screen what support requesters see on their smartphone, wearable headset, or smart glasses.

- Key features include remote camera sharing, VoIP HD audio, 3D object tagging, freehand highlighting, annotating the video stream with text, session recording, encrypted file transfer, optical character recognition (OCR), real-time information sharing, and seamless session request.

- Record sessions to evaluate supporter performance and provide proof of service.

- TeamViewer Assist AR seamlessly integrates with smart glasses and wearable headsets from Epson, RealWear, and Vuzix, enabling technicians to work on support tasks with both hands.

Solution Highlights

Cross-Platform Support

Create or join remote support sessions for TeamViewer or TeamViewer Assist AR — from virtually any kind of device to any device — from a Salesforce Case, Contact, Account, Lead or Opportunity. Simply send customers a link to invite them to support sessions.

Advanced Reporting

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.

Real-Time 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, routine processes to save time and money. Upload scripts for easy, convenient access during each session.

Augmented Reality Remote Assistance

Use augmented reality remote assistance with TeamViewer Assist AR to see what support requesters see on their phones or smart glasses and guide them to speedy resolutions.
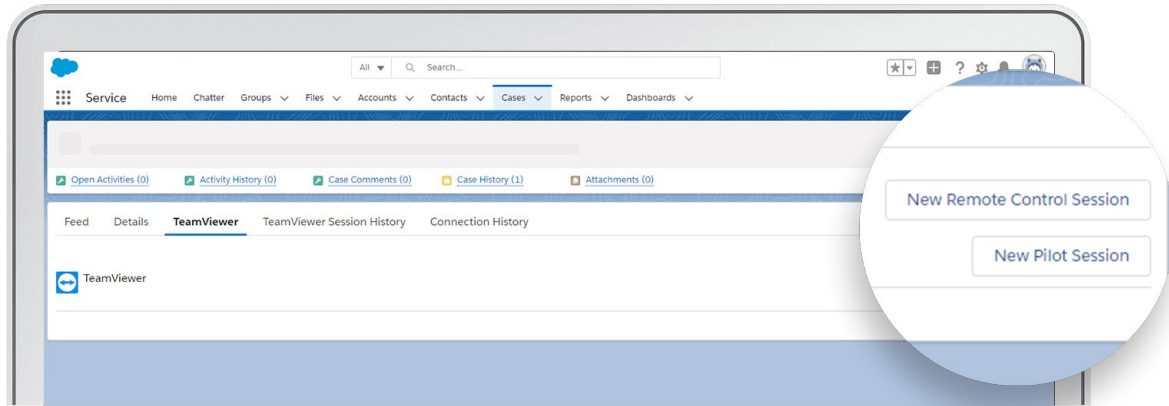
Figure 1: From within Salesforce, supporters can choose to start remote control sessions or augmented reality remote assistance video calls.

Key Benefits

Remote Access and Support

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-minute live demo presentations on the fly, instead of describing how products work in 20-minute phone calls.

Boost Support Efficiency

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

TeamViewer Assist AR

Improve First-Call Resolution Rates

Resolve issues faster on the first call by guiding support requesters through step-by-step visual instructions, using text annotations and 3D object tagging in the live video stream.

Reduce Costs

Avoid delays and reduce machine downtime by visually assessing physical problems remotely without having to send an expert out on field service calls until a replacement part has arrived.

Minimize Human Error

Use OCR to convert images of long serial and model numbers into text so they can be recorded and researched without human transcription errors.

Increase Knowledge Retention

Guide users to perform common tasks they will have to perform routinely instead of doing the tasks for them.

Figure 2: TeamViewer Assist AR support requesters see annotations and visual guides placed on their screen by the remote expert supporter, clarifying every step.

Figure 3: Using object character recognition (OCR), TeamViewer Assist AR converts a serial number into searchable text.

License Requirements and Recommended Bundles

The TeamViewer integrations for Salesforce require:

- ✓ TeamViewer Tensor license
- ✓ TeamViewer Enterprise Integrations AddOn
- ✓ TeamViewer Assist AR Professional license (Optional)

Recommended Bundles				
Salesforce Subscription Tier	5-20 Agents	20-50 Agents	50+ Agents	Augmented Reality Remote Assistance Package
Essentials	• TeamViewer Tensor, Basic • TeamViewer Enterprise Integrations AddOn			• TeamViewer Assist AR, Professional • TeamViewer Assist AR, Professional Integration AddOn
Professional	• TeamViewer Tensor, Basic • TeamViewer Enterprise Integrations AddOn • TeamViewer Assist AR, Professional (optional)	• TeamViewer Tensor, Pro • TeamViewer Enterprise Integrations AddOn • Mobile Device Support • TeamViewer Assist AR, Professional (optional)		• TeamViewer Assist AR, Professional • TeamViewer Assist AR, Professional Integration AddOn
Enterprise	• TeamViewer Tensor, Basic • TeamViewer Enterprise Integrations AddOn • TeamViewer Assist AR, Enterprise (optional)	• TeamViewer Tensor, Pro • TeamViewer Enterprise Integrations AddOn • TeamViewer Assist AR, Enterprise (optional)	• TeamViewer Tensor, Pro • TeamViewer Enterprise Integrations AddOn • TeamViewer Assist AR, Enterprise (optional)	• TeamViewer Assist AR, Enterprise • TeamViewer Assist AR, Professional Integration AddOn
Unlimited		• TeamViewer Tensor, Unlimited • TeamViewer Enterprise Integrations AddOn • TeamViewer Assist AR, Enterprise (optional)	• TeamViewer Tensor, Unlimited • TeamViewer Enterprise Integrations AddOn • TeamViewer Assist AR, Enterprise (optional)	• TeamViewer Assist AR, Enterprise • TeamViewer Assist AR, Professional Integration AddOn

Questions?

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Resources

TeamViewer App for Salesforce Cloud

TeamViewer for Salesforce

Request Free TeamViewer Tensor Demo or Consultation

Salesforce Integration User Guide

Request a Free Trial of TeamViewer Assist AR

About TeamViewer

As a leading global technology company, TeamViewer offers a secure remote connectivity platform to access, control, manage, monitor, and support any device — across platforms — from anywhere. With more than 600,000 customers, TeamViewer is free for private, non-commercial use and has been installed on more than 2.5 billion devices. TeamViewer continuously innovates in the fields of Remote Connectivity, Augmented Reality, Internet of Things, and Digital Customer Engagement, enabling companies from all industries to digitally transform their business-critical processes through seamless connectivity.

Founded in 2005, and headquartered in Göppingen, Germany, TeamViewer is a publicly held company with approximately 1,400 global employees. TeamViewer AG (TMV) is listed at Frankfurt Stock Exchange and belongs to the MDAX.

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