



Swyft Mobile for Salesforce™

User Guide

Last updated: May 2018



Welcome to Swyft Mobile for Salesforce!

Swyft Mobile for Salesforce envelopes The Salesforce mobile app in a secure container on your device to keep your CRM data protected and private with:

- BlackBerry Dynamics applications for secure email and secure browser
- Secure data sharing among approved apps
- Secure copy and paste
- Strictly enforced jailbreak and compliance policies

With Swyft Mobile for Salesforce, you can access Salesforce, any custom apps, CRM, and partner apps, as well as any BlackBerry Dynamics application on any device.

For more on the core Salesforce mobile application and its features, visit salesforce.com.

In this guide, you'll learn about:

- **Requesting/Receiving an Access Key**
- **Activating Your Swyft Mobile for Salesforce Application**
- **Logging into Swyft Mobile for Salesforce**
- **Working with Other BlackBerry Dynamics-enabled Applications**



Requesting/Receiving an Access Key

Depending on whether your organization is set up for self-provisioning or Easy Activation, you might need to request a BlackBerry Dynamics access key. To request an activation key:

- Email your enterprise IT help desk or use whatever standard procedure your company has in place for requesting new software and applications, or
- Use the self-service portal, if available.

In either case, if approved, you will receive a response with the following:

- Your email address
- An access key for Swyft Mobile for Salesforce

After you've received the email, proceed with activation.

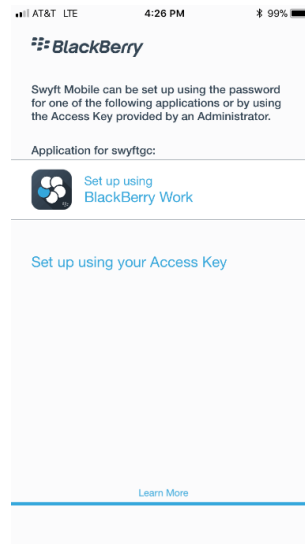
Activating Your Swyft Mobile for Salesforce Application

As indicated in the email you received from IT, do the following:

1. Get the Swyft Mobile for Salesforce app from the App Store or Google Play and download it to your device.
2. Install and launch the application.
3. Choose one of the following activation methods:

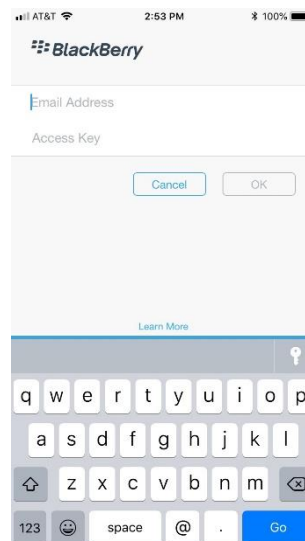
Method 1 - Easy Activation

If your admin enables it, you can authenticate your Swyft Mobile for Salesforce application very quickly with little to no difficulty using what's called "Easy Activation." Easy Activation hands off activation (of Swyft Mobile for Salesforce in this case) to a previously installed BlackBerry Dynamics app on your device, and uses that app to authenticate Swyft Mobile for Salesforce. If you choose to use one of them, you are prompted for the password that you previously set for it.



Method 2 - Authenticating with an Access Key (PIN)

In the email you receive from your admin, you can authenticate your app using your email address and the the Access Key or PIN that was sent to you.



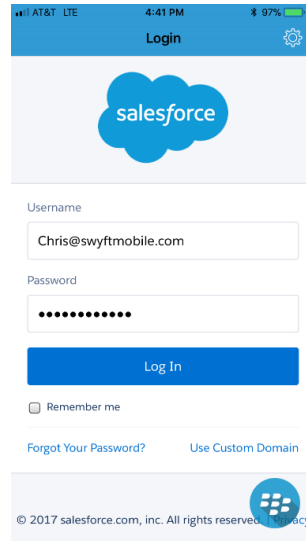
4. Tap **Next** and wait for the secure activation sequence to complete
5. Enter a password to secure the Swyft Mobile for Salesforce app itself.

Logging into Swyft Mobile for Salesforce

The first time Swyft Mobile for Salesforce is launched you are prompted for permission to access your information and provide it to Salesforce via the Internet.



1. Enter your Salesforce Username and Password, and then tap **Log In** to access Salesforce.

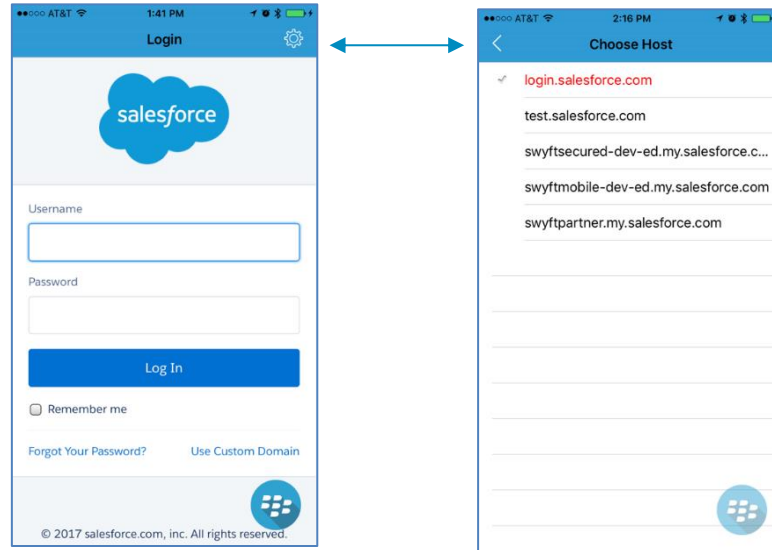


2. You will be prompted to allow or deny the application access to certain privileges on your device. If you agree, click Allow.

If your Salesforce environment has been setup to use Single Sign-On (SSO) you are prompted to supply credentials to the SSO system, an example of which is shown below. The Login screen may vary in appearance depending upon your organization's SSO configuration.



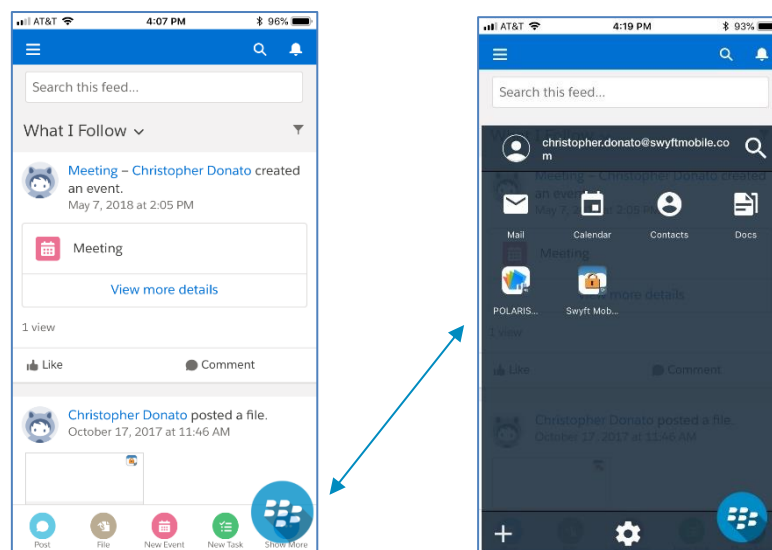
Your Swyft Mobile for Salesforce administrator can configure your app to support multiple custom Salesforce hosts. With this feature enabled, you can select your Login host on your device.



Working with Other BlackBerry Dynamics Apps

Swyft Mobile for Salesforce works with many other BlackBerry Dynamics-enabled applications, including BlackBerry Access, BlackBerry Work, and third-party applications certified on the BlackBerry Dynamics platform. Visit the App Store to search for and download apps.

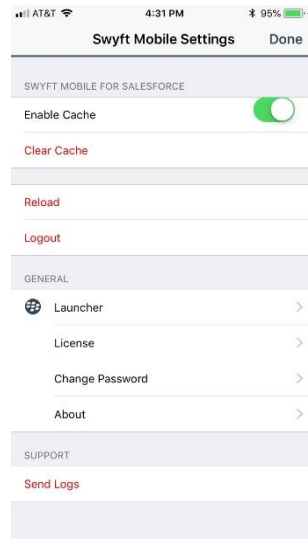
You can run other BlackBerry Dynamics apps using the BlackBerry Launcher, if your administrator has configured the Launcher feature to do so. The Launcher can be accessed by tapping the blue BlackBerry bubble on your app screens. The Launcher allows you to quickly switch between this app and any other BlackBerry Dynamics app on your device, as well as to move between Mail, Calendar, Contacts, and Chat (IM) in the BlackBerry Work app. The Launcher also gives you access to Quick Create tools for email, contacts, and calendar events, along with access to your configurable BlackBerry Dynamics application settings.





Application Settings

Tap the **Settings** icon in the BlackBerry Launcher to change app settings.



- Using **Enable Cache** may enhance application performance.
- Use **Clear Cache** as a troubleshooting option.
- Use **Reload** to reload the application page.
- Use the **Launcher** option to control the opacity of the onscreen Launcher button.
- Use **Send Logs** when instructed to do so by your administrator.
- You can also **log out** or **change your Swyft Mobile for Salesforce password** using this page.