User's Guide to cbForce 2.0

CanyonBridge cbForce™

Contents

CHAPTER 1

Welcome to cbForce

Welcome to cbForce, the CanyonBridge product that provides integrated Web browser access to both your Salesforce.com data and Microsoft® Exchange Server.

This chapter describes the documentation provided for the cbForce product.

This chapter includes the following topics:

cbForce Documentation

The cbForce documentation is provided electronically in the form of Adobe PDF files that consist of the following:

- This manual, *User's Guide to cbForce 2.0,* contains a detailed description of cbForce concepts, functionality, and user "How To's".
- An HTML Readme that contains the latest known issues for cbIntegrate Server/cbForce.

To get the most out of this manual, review the table of contents to familiarize yourself with the topics included in this guide. You may also find the following documents to be helpful:

- Administrator's Guide to cbIntegrate Server
- User's Guide to cbConnect 2.5

Documentation Conventions

CanyonBridge documentation uses the following typographic conventions:

Convention	Meaning
Boldface	Indicates menu commands, names of interface items such as toggle buttons and option buttons, as well as user input.
Italics	Used as a placeholder for information you provide. For example, *filename* in a procedure means you type the name of a file. Italics are also used for new terms, as well as the titles of books. Occasionally used for emphasis as well.
UPPERCASE	Indicates keys on the keyboard, such as ALT for the Alt key and F5 for the function key labeled F5.
`Monospace`	Used to indicate the text displayed at a command prompt or within a text file.
▶	Step-by-step procedural instructions

CanyonBridge on the World Wide Web

The CanyonBridge Web site (http://www.canyonbridge.com) contains a variety of information for CanyonBridge customers and end-users.

Reader Comments

At CanyonBridge, we endeavor to provide clear, accurate, and usable documentation for all products. We welcome any comments, corrections, or suggestions you may have for improving our documentation.

Please e-mail your suggestions to the documentation authors at documentation@canyonbridge.com.

Please include both the name of the product and the title of the document in the subject line of your message.

CHAPTER 2

Introduction to cbForce

This chapter provides an overview of the purposes and capabilities of cbForce, the CanyonBridge product that provides integrated Web browser access to both your Salesforce.com data and Microsoft® Exchange Server.

The following topics are covered:

A Brief Overview of cbForce

cbForce provides Web-based access to your Salseforce.com and Microsoft Exchange Server data within a single user interface. cbForce serves up a desktop-like user experience in a Web browser, with the advantage of integrated functionality.

For instance, cbForce's patent pending Smart Mail™ checks incoming Microsoft Exchange e-mails against your Salesforce.com leads and contacts. When a match is made, the appropriate Salesforce icon is placed in the Salesforce column in the cbForce interface. By default, after you read one of these e-mails, cbForce posts a copy of the e-mail in the Salesforce.com activity history for the contact or lead who sent the e-mail to you. Any subsequent e-mails you send to your leads and contacts from cbForce may also be stored in the Salesforce.com database as part of the activity workflow.

cbForce delivers the same user experience regardless of the version of Microsoft Exchange Server you access. For instance, users of Exchange 5.5 can exploit the same kind of rich and highly interactive user interface as Exchange 2003 users.

Client Side

You do not need to install anything on your computer to access the cbForce product. You only need to open a Web browser and provide the proper URL to connect to a Web server hosting cbForce. There is no plug-in or install to download. On first time connection, your computer merely caches cbForce image resources and JavaScript. This is part of what makes cbForce so responsive, even for a first time connection.

Server Side

On the server side (which your Network Administrator sets up), the cbForce product consists of three things:

- A cbIntegrate Server
- A Web server
- A database

The cbIntegrate Server runs the cbForce application and provides the cbForce interface to both Salesforce.com and Exchange Server data. A cbIntegrate Server version of a Web server provides the Web access needed for you to access cbForce. The database installed with the cbIntegrate Server provides storage to manage your cbForce user experience.

Security Features in cbForce

The following security features are available in cbForce:

- Authentication
- SSL

Authentication

When you create a new account in cbForce, your authentication is based on your Salesforce.com credentials, Windows system credentials, and Exchange access rights.

Single Point of Authentication

When you first create your cbForce user account, you also create a single username and password on the cbIntegrate Server to act as a proxy for logging on to Exchange and Salesforce.com at the same time. If you want, the same user name and password can be used to log on to all CanyonBridge applications running on the cbIntegrate Server to which you have access rights. Authentication is required for each logon attempt.

Time out

cbIntegrate Server has a default time out period of 30 minutes, though your Network Administrator may change this. If you do not interact with your browser within that time, the cbForce browser connection times out. You must re-authenticate in order to access data after a time out.

Back click

With cbForce, there is no ability to back click to the application, unless you access cbForce within a custom tab in Salesforce.com. In other words, if you browse to a non-cbForce window on the Internet from the cbForce application, when you back click to cbForce, you must re-authenticate to access cbForce. This dramatically reduces the risk of leaving corporate data open to the next person using a kiosk or other physically non-secure browser access location.

SSL

Your Network Administrator may configure cbIntegrate Server to make use of SSL (Secure Sockets Layer) to encrypt data exchanges between the client and server. For more information on this topic, see your Network Administrator.

CHAPTER 3

Creating a New cbForce Account

This chapter describes how to create a new account in cbForce.

This chapter includes the following topics:

Accessing cbForce for the First Time

You can access cbForce through either of two paths:

- Ask your Network Administrator for the Universal Resource Locator (URL) or link you need to access the application. Type the URL or click the link that takes you to the cbForce application login page. To proceed, see Creating a New Account in cbForce.

- If you access cbForce through a custom tab on the Salesforce.com Web site (only available to Salesforce.com Enterprise accounts until June 8, 2005), you can find cbForce by following the steps in the procedure below:

➢ **Finding cbForce on salesforce.com**

1. In your Web browser, navigate to **www.salesforce.com**.

2. On the Saleforce.com Web site, click the tab labeled **Customer Login**.

3. On the left side of the Web page that is displayed, under Login, type your **User Name** and **Password** in the appropriate type-ins, then click **Login**.

Note If you do not know your salseforce.com logon credentials, contact your Network Administrator.

4. On the Web page displayed, click the custom tab your Network Administrator added. Ask your Network Administrator if you are unsure of which tab to use. The cbForce login page should appear. You should now proceed to Creating a New Account in cbForce, below.

Note In order to log out of the cbForce application when running in a tab on Salesforce.com, you must log out of Salesforce.com entirely, or switch to another tab. (You can log back in by selecting the tab again.) Clicking the log out button in cbForce does not end your session in cbForce.

Creating a New Account in cbForce

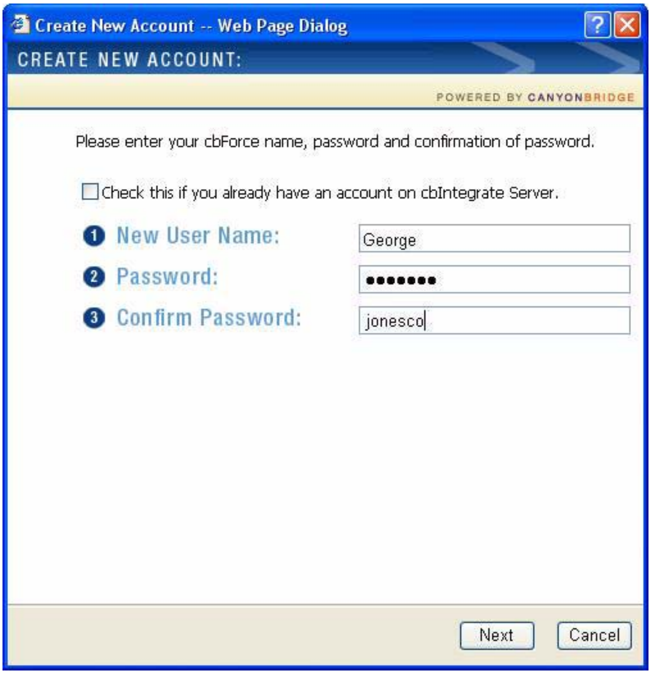
It is possible that your Network Administrator created your user account for you. If you are unsure, ask your Administrator. If your Network Administrator has not created an account for you, you need to do so once you have reached the cbForce application log on page.

Important If you use a popup blocker in your browser, you must allow popups for the cbForce site, or cbForce will not function properly. For instance, each new mail message opened is considered a popup by most popup blockers.

➢ **To create a new account from the login page**

1. On the login page, click **Create New Account**.

2. In the **Create New Account:** window, type a username and password, (also confirm password) in the respective type-in boxes.



If you have already provided credentials for another CanyonBridge application running on the cbIntegrate Server (such as cbConnect), select the **Check this if you already have an account on cbIntegrate Server** check box.

Click **Next**.

Note The credentials you supply here can be any you desire, however, it may be easiest for you to use the same credentials you already use to access your Exchange Server mail box. cbForce provides single point authentication so that you can choose a different user name and password than those needed on the next screen of the window to access your Salesforce.com data.

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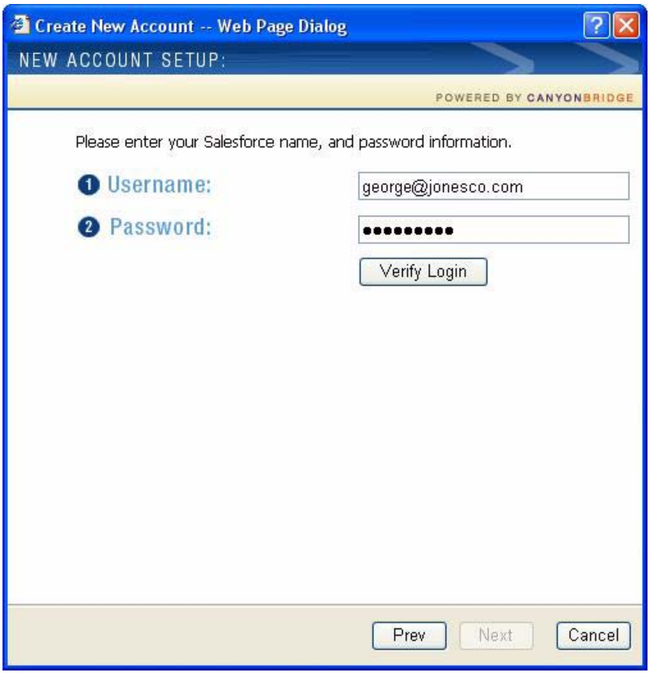
3. When the **New Account Setup** window appears, type the appropriate information for your Salesforce.com account in the **Username:**, and **Password:** boxes.



Important The Username and Password you supply should be the Salesforce.com username and password you use to log in to Salesforce.com.

4. Click **Verify Login**. When the **Next** button becomes enabled, click **Next**.

5. Because cbForce is an integration of access to both Salesforce.com data and Microsoft Exchange messaging, on the next screen you must supply your Microsoft NT credentials to access your e-mail account. (Username, password and domain--if you are not sure what these are, contact your Network Administrator.)

   Important By default, the **Copy cbIntegrate Server account user name and password** box is checked for single point of authentication purposes. If your credentials for Microsoft Exchange do not match the single point of authentication credentials you added in step 4, you need to change the username and password, as well as adding the domain on which you have access rights to Exchange.

6. When you are finished typing your credentials, click **Finish**.

7. Wait a moment while your inbox loads. The cbForce application is functioning.

CHAPTER 4

Using cbForce

This chapter describes how to use cbForce and explains some of the innovations in the cbForce interface.

This chapter includes the following topics:

Understanding cbForce

cbForce is a Web-based software application that integrates CanyonBridge's premium messaging product, cbConnect™ (which provides access to Microsoft Exchange Server), with Salesforce.com's Customer Relationship Management (CRM) software. Through this integration, cbForce provides you with a highly interactive browser accessible application that adds to your productivity in both the messaging and CRM spheres.

The interface for cbForce is based on that used in cbConnect, both in look and core functionality. If you are unfamiliar with cbConnect, you may find it useful to review cbConnect's capabilities as highlighted in the *User's Guide to cbConnect 2.5*.

Understanding Updating in cbForce and Salesforce

Changes made in cbForce are written to the Salesforce.com database immediately, however, Salesforce database updates are not immediately made available through the Salesforce Application Program Interfaces (APIs) which cbForce uses to display the changes you make. This means that some changes may not be immediately reflected in cbForce, although a check of Salesforce shows you that the updates have been made.

For example, if you change a user from a Lead to a Contact in cbForce (or make an association) the icon associated with your change may not be immediately displayed, or may disappear on a re-login until Salesforce reflects your changes in their APIs. Salesforce.com's delay in posting updates already made may result in a substantial delay in cbForce application interface updates.

Understanding Smart Mail and Associated Features

Smart Mail™ is a term that refers to the CanyonBridge patent-pending technology that allows cbForce to check incoming and outgoing Microsoft Exchange Server e-mails against Salesforce.com Contacts, Leads, or Users. When a match with a Contact, Lead, or User is found, a Salesforce icon is displayed with the e-mail, as in the graphic below.

Note E-mail stored in Exchange prior to your first use of cbForce is not surveyed for Salesforce.com data matches until you encounter the e-mail within the cbForce Inbox viewing pane. Data matching and Salesforce icon display may take a few minutes when pre-existing e-mail is first accessed in cbForce.

When Smart Mail has identified the person receiving an e-mail as a Salesforce.com Contact or Lead, the default cbForce **Add Activity** setting causes the e-mail to be added to the activity history of the Contact or Lead when the e-mail is read. Similarly, by default, e-mails sent to Leads or Contacts are added to the respective activity histories at the time they are sent from cbForce.

You can change the default behavior of adding e-mails to activity histories by following the procedure under Turning Off Add Activity below.

Turning Off Add Activity

By default, the **Add Activity** check box is set for all e-mails in your **Inbox**. Setting Add Activity allows cbForce to store an e-mail in the Salesforce.com activity history of the Contact or Lead.

If you do not want to Add Activity for incoming and outgoing e-mails by default, you can change the default setting in the procedure below.

Note To turn off Add Activity for individual e-mails, see Adding/Removing E-mails from an Activity History. Further, note that whenever you make an association, an Add Activity will be created in Salesforce, regardless of activity settings you set elsewhere. You can however, use the procedure below to change any setting.

➢ **To turn off Add Activity**

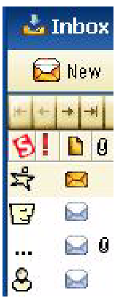
- In the Inbox, remove the check from the Salesforce **Add Activity** check box.

  You can find the Add Activity check box in two locations. The most visible is on the right side of the browser at the top of the Inbox pane.

  You can also find the Add Activity check box in the popup menu accessed by right-clicking within the Inbox pane.

Using the Salesforce Column and Menu

cbForce provides you with a Salesforce column in the Inbox. The column is located at the far left where the Salesforce.com icons are displayed when Smart Mail matches the sender of an incoming e-mail to a Contact, Lead, or User stored in the Salesforce.com database.



E-mails that do not display a Salesforce.com icon display an ellipsis (...). This is because both the Salesforce icons and the ellipsis act as a clickable button that provides access to a composite menu you can use to act on an e-mail, as in the graphic below:

Different menu options are available depending on the origin of the e-mail, and any associations made with other Salesforce.com data.

The options available in the main pane of the menu may include:

- **Add/Remove Activity for Message (see** Adding/Removing E-mails from an Activity History**)**
- **Associate** (see Associating Exchange Data with Salesforce Data)
- **Create Case** (see Creating a Case)

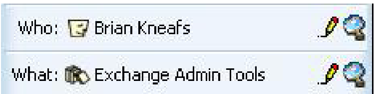
In addition, there are other options related to the individual who sent the e-mail—identified as **From**. If the person is a Salesforce User, or does not already exist in the Salesforce database, beyond the three menu items listed above, the only other three options are to:

- Click the **Lead** icon—creates the individual as a lead in the Salesforce.com database
- Click the **Contact** icon—creates the individual as a lead in the Salesforce.com database

- Click the **Contact** icon with the **blue arrow**—converts the individual from a Lead to a Contact

If the person already exists in the Salesforce.com database, you can also edit or view the data for that person by clicking the pencil (edit) or magnifying glass icon (view).

Once you have associated an e-mail with a who or a what in the Salesforce database (see Associating Exchange Data with Salesforce Data), an item is added to the menu that identifies the Who or What and provides you with icons for viewing and editing the item.



Note The icon in the Salesforce column in cbForce also changes for the e-mail when you associate the e-mail with a What.

Adding/Removing E-mails from an Activity History

When you receive an e-mail in cbForce from someone already stored in the Salesforce.com database as a contact or lead, by default that e-mail is added to the activity history for that Contact or Lead when the e-mail is read. This is indicated by the green up arrow appears on the icon when the e-mail is read.

The same is true of outgoing e-mails. If the person to whom you send an e-mail is a contact or a lead in Salesforce, the outgoing e-mail is appended to the activity history for that individual by default. You may remove an e-mail from an activity history as your needs dictate.

Note With the default setting, when you forward an e-mail that has been added to an Activity History to someone whose e-mail box is located on the same physical Exchange Server as your own, the icon for that incoming e-mail includes the green up arrow (indicative of inclusion in the Activity History to which it was assigned prior to being forwarded).

Removing Incoming E-mails from Activity History

When cbForce detects that the sender of an incoming e-mail is already stored as a contact, lead, or user within the Salesforce.com database, cbForce appends the appropriate Salesforce icon to the e-mail in the (Salesforce column) and adds the e-mail to the activity history by default. You can remove the e-mail from the history by performing the steps below when the e-mail is read.

Note You can prevent the e-mail from being added by deselecting Add Activity before you read the e-mail.

➢ **To remove an incoming e-mail from the activity history**

1. Click the Salesforce icon button in the Salesforce Column of the Inbox.

2. On the popup menu, click **Remove Activity for Message**.

Note You can re-add the e-mail to the activity history by opening the same menu and clicking **Add Activity**.

Removing Outgoing E-mails from Activity History

When cbForce detects that the recipient of an outgoing e-mail is a contact or lead within the Salesforce.com database, cbForce appends the appropriate Salesforce icon next the recipient name. Sending the e-mail immediately ensures that the e-mail becomes a part of the activity history for that person. You can remove the e-mail from the history by performing the steps below *before* you send the e-mail.

Note If you forget follow the procedure below before you send the e-mail, you can open the **Sent Items** folder and follow the same procedure as that in Removing Incoming E-mails from Activity History above.

➢ **To remove an outgoing e-mail from the activity history**

1. Click the Salesforce icon next to the name in the **To...** box.

2. On the popup menu, deselect the **Track Activity for Contact** (or Lead).

   Note The check box is not available for User icons since there is no activity history for users in the Salesforce.com database.

Creating a Case

Using cbForce, you can create a case in Salesforce for any e-mail *except* where the e-mail sender is identified as a Lead in the Salesforce.com database.

➢ **To create a case**

1. In the **Inbox**, select an e-mail and click the button in the Salesforce column.

2. On the pop up menu, choose **Create Case**.

3. When the Salesforce window is invoked, fill in the appropriate data for the case, then close the window.

Associating Exchange Data with Salesforce Data

Using cbForce, you can associate any e-mails you receive through your Exchange account, with any available Salesforce.com who (Contact or Lead) or what (Account, Opportunity, Case, etc.) data item.

Likewise, when you create a meeting or appointment in the cbForce calendar, the appointment or meeting is stored by default both in Exchange and the Salesforce.com database. You can create an association for the appointment or meeting as well.

Note Recurring appointments and meetings are not supported by Salesforce.com, and are stored only in Exchange Server, therefore no Salesforce association functionality is available for recurring appointments and meetings.

➢ **To create an association**

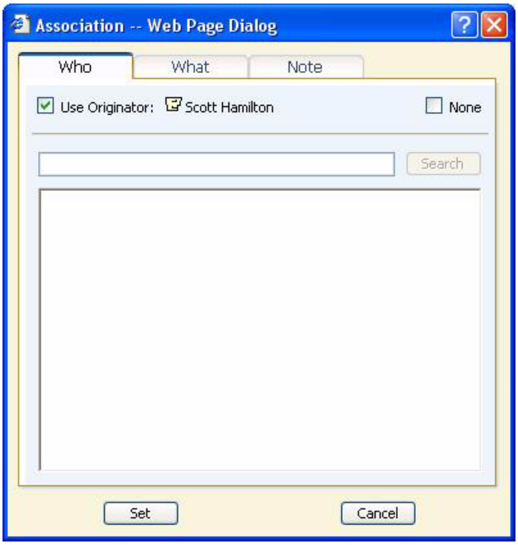
1. Either in the **Inbox** or the **Calendar**, select an e-mail or calendar item.
2. Click either the Salesforce icon button (if one is displayed), or the ellipsis (**...**).
3. From the popup menu, choose **Associate**.
4. In the **Association** window, there are three tabs:
   - **Who**--Displays a list of Leads and/or Contacts
   - **What**--Allows you to choose the type of activity you want to associate
   - **Note**--By default, displays text of associated e-mail or, for calendar item, any text entered in the text area

   You may associate an e-mail or calendar item with any **Who** (**Contact** or **Lead**) or any **What**. You may also associate a given e-mail or calendar item with both a Who and a What, as long as the Who is not a Lead.

   Note Association Note edits do not persist as do other data. For example, Note edits do not persist across logins or when you remove and then re-add an association.

Using the selections available on the three tabs, choose the item(s) you want to associate with the e-mail or calendar item.

To choose a Who, you must type a name in the type-in, click **Search**, then select the name from the list and click **Set**.



Note To disassociate an e-mail or calendar item, set the Who and What tabs to **None**.

Understanding and Using the cbForce Calendar

Both the **Calendar** and the **Group Calendar** (you can find the latter under the **All** node in the **Folder List**) in cbForce function basically as they do in cbConnect. You may want to review the sections on the two calendars in the *User's Guide to cbConnect 2.5* to be sure you are familiar with the functionality described there. Functionality available only in cbForce is highlighted below.

Creating Cross Calendar Data

By default, all appointments you create in cbForce is stored in both Exchange Server and your Salesforce account calendar. You can also associate the appointments and meetings you create in cbForce with other Salesforce data. For more information, see Associating Exchange Data with Salesforce Data, above. If you want to change the default behavior for the calendar, see Changing the Default Calendar Behavior below.

Changing the Default Calendar Behavior

In the cbForce calendar, all appointments you create in cbForce are created in both Exchange and Salesforce.com at the same time. Changes you make to Exchange appointments in cbForce which are auto tracked are sent to the Salesforce.com database as well.

If you want to change the default behavior and turn off automatic updating for the entire calendar, you can do so by following the procedure below.

Note If you want to turn off the auto tracking for an individual appointment or meeting, see Removing a Calendar Item from Salesforce.

➢ **To change the default calendar behavior**

1. In either the **Calendar** or **Group Calendar**, locate the **Default** toggle just above the multiple month calendars displayed to the right of the main calendar interface.

2. Click the **Default** toggle button. When the Default button is checked, all appointments you create in cbForce are created and auto tracked in your Salesforce calendar. When the Default button is not checked, appointments you create in cbForce are not stored in your Salesforce calendar.

You can also find the **Default** button right-clicking on the calendar, or by clicking the down arrow next to the **New** button on the top left of the calendar.

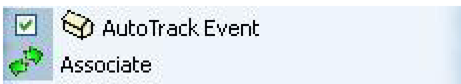
Removing a Calendar Item from Salesforce

If the auto track functionality in cbForce is left on the default setting, appointments you create in Exchange are also stored by default in your Salesforce.com account calendar. If you do not want a particular appointment or meeting to appear in your Salesforce.com calendar, follow the procedure below.

Note Recurring Microsoft Exchange appointments are not stored in Salesforce since recurring appointments are not supported by Salesforce.com.

➢ **To remove an appointment from the Salesforce.com calendar**

1. In the **Calendar**, click the Salesforce.com icon button on an appointment or meeting.
2. Deselect **Auto Track Event**.



Note In addition, you can associate a meeting or appointment with, for example, a Salesforce contact or campaign. For more information on this topic see Associating Exchange Data with Salesforce Data above.

Using the Synchronize Function

Using cbForce, you can add Salesforce calendar data to Exchange that correspond to ones you created or modified in the Salesforce.com calendar.

Changes you make to your Exchange appointments or meetings *in cbForce* are updated automatically to your Salesforce.com calendar, as long as you leave the **Auto Track Event** option selected. For more details see Changing the Default Calendar Behavior and Removing a Calendar Item from Salesforce.

If you modify the date or time of a meeting or appointment in the Salesforce.com calendar (or the Exchange data in some interface other than cbForce), you can use cbForce to update Exchange and keep the data auto tracking.

Note cbForce also allows you choices in Setting Sync Options that determine how far ahead the sync function searches for data in your Salesforce calendar, as well as choosing between an automated update or a manual update that allows you to preview individual data items before applying updates to Exchange.

Updating Exchange Manually

If you want to create data items in Exchange that correspond to ones you have created in the Salesforce.com calendar, you can do so by following the procedure below.

Note If you choose the **Automatic** update option in Setting Sync Options, you do not need to follow this procedure.

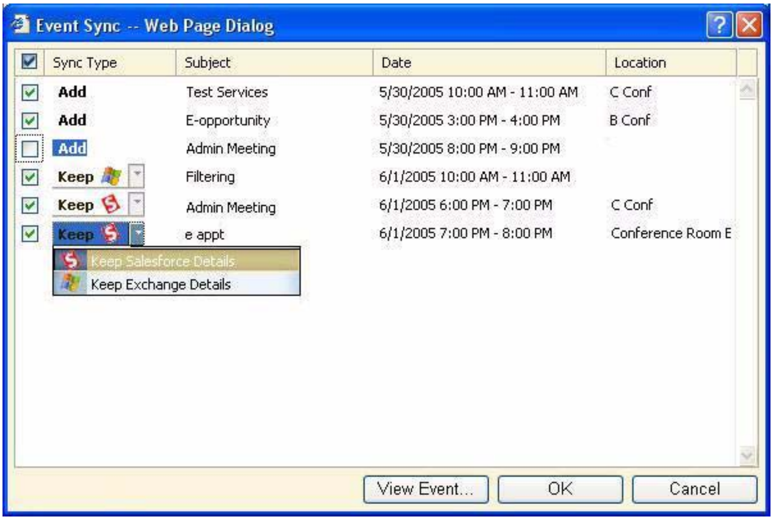
➢ **To update your Exchange calendar**

1. Browse to your cbForce calendar.

2. In the upper right corner of the calendar interface, click **Sync**.

3. When the **Event Sync** window appears, check those items you want to import into your Exchange calendar.

Note If you want to view the details for an individual Salesforce.com calendar item, select the item, then click **View Event**.



4. For those items that you have modified in another interface than cbForce, you must choose whether to keep the details as they exist in Salesforce or in Exchange. Click the down arrow on the **Keep** box, then choose between **Keep Exchange Details** or **Keep Exchange Details**.

Note When you make your choice, the date/time details you choose to keep are sent to update the other database so that both are in agreement.

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5. Once you have chosen which items/versions to add, click **OK**.

6. The imported data should appear in the appropriate date/time slot together with a Salesforce.com icon.

7. When the **Sync has completed** message appears, click **OK**.

Setting Sync Options

cbForce allows you to choose between several options for the synchronization function when you update Exchange.

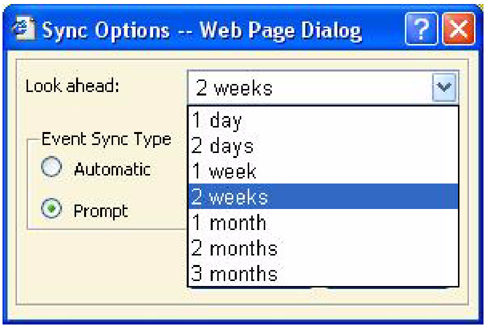
➢ **To set sync options**

1. Browse to your cbForce calendar.

2. In the upper right corner of the calendar interface, click the down arrow on the **Sync** button, then click **Sync Settings**.

3. In the **Sync Options** window, choose how you want the synchronization function to work by completing the following sub steps:

    a. Click the down arrow in the **Look ahead:** box, then choose how far ahead you want cbForce to check in the Salesforce.com calendar for meetings and appointments.



Note The further ahead you set cbForce the Look ahead, the longer the sync takes to finish.

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    b. Once you have chosen the time setting, choose the **Event Sync Type** you want:

- **Automatic**—updates Exchange without presenting you with the **Event Sync** window that allows you to preview the calendar data sent to Exchange

- **Prompt**—updates Exchange only after presenting you with the **Event Sync** window so you can preview and choose among items to update

4. One you have chosen your sync options, click either **Sync Now** (closes Sync Options window and does immediate sync according to the settings you have chosen) or **OK** (saves your sync option settings in cbForce and closes window).

Using Statement Complete and the Address Book

Statement complete and the integrated address book have the same basic function as the statement complete and address book do in cbConnect. Their functionality is merely extended in cbForce to provide you with more information so that you can use the integrated aspects of cbForce more easily.

Using Statement Complete

In cbForce, there is an addition to statement complete beyond that available in cbConnect. The names of individuals stored in the Salesforce.com database appear together with the appropriate Salesforce.com icon for leads, contacts, and users. Once you make a selection and the person is added to the recipient box, the associated Salesforce icon is displayed next to the individual's name.

Using the Integrated Address Book

The address book in cbForce is an integrated one. This means you can access your Microsoft Exchange Global Address List (GAL), your Salesforce.com addresses, and your personal contacts, all in a single easy to use interface by clicking on either the **To:**, **Cc**, or **Bcc** buttons.

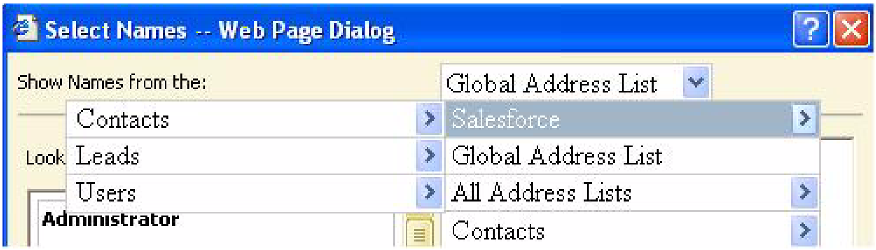
➢ **To use the Salesforce.com address book**

1. In a mail folder in cbForce, click the **New** button at the top of the viewing pane.

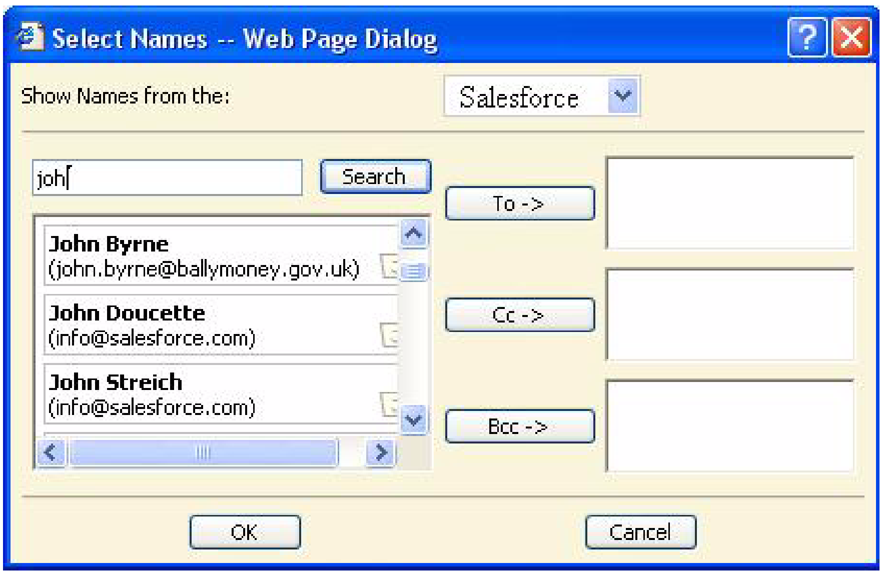
2. In the New Message, click the **To...** (or **Cc..**. or **Bcc...**) button.

3. The address book (**Select Names** window) appears. By default, the names displayed on the left of the window are those stored in the Exchange GAL. If you want to access names from the Salesforce.com address book, click the down arrow in the **Show Names from the:** selection box.

4. Select **Salesforce**, or one of its sub selections.



5. Due to the size of the Salesforce.com database, no names are displayed by default. To choose a name, at minimum, type the first two or three letters of a person's name, then click **Search**. An alphabetical list of names matching what you typed appears.



Note The address book displays an icon in association with each name in Salesforce that indicates whether the person is a user, contact or lead. To potentially see more information, rest the pointer of your mouse over the icon until the tool tip associated with that person appears.

6. Select a name, and click the **To->** button, then click **OK**. Alternatively, you can select the name in the list and drag and drop the name within the **To->** box. The correct name is displayed in the To: box of your e-mail.

Note You can use similar steps to drag and drop or assign a name to the **Cc** or **Bcc** boxes.

Changing Your Salesforce.com Credentials

If you want to change the Salesforce account that you use in cbForce, you can do so through the Preferences portion of the cbForce interface.

➢ **To change your Salesforce.com log on credentials**

1. Log on to cbForce.

2. In the **Folder List** on the left of the browser, expand the **Preferences** node of the tree by clicking the plus sign (+).

3. Select the **Salesforce** node.

4. In the **Username:** and **Password:** type-ins, type the credentials for the Salesforce.com account you want to access in cbForce, then click **Update**.

Important After you change accounts, you must re-login to cbForce, otherwise, your Salesforce.com data does not display properly.

Using a Shortcut to Access cbForce

If you access cbForce outside of a custom tab at Salesforce.com, cbForce allows you to type a shortcut in your browser to access the application more quickly. For example, if the URL you normally type to access cbForce looks like the following: **machine/cb.cba?run?appName=cbForce**, you can type **machine?cbForce** as a shortcut. Doing so takes you directly to the index page and then to the cbForce login screen.

Understanding cbForce POP3 Functionality

Salesforce functionality is supported in any POP3 account you may add— with a few caveats however:

- When you send a POP3 e-mail with an association, the association does not persist in that e-mail, even if you send the e-mail to an Exchange account accessed by cbForce. The incoming e-mail contains no Salesforce data.
- Each time you log out of POP3, any association you set for a given e-mail is lost. This is because POP3 does not natively persist the notion of Read/ Unread.