AnyDesk for Salesforce

Integration Guide

AnyDesk Software GmbH

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Contents

Introduction

The AnyDesk integration for Salesforce seamlessly embeds remote control functionality into your Salesforce Service and Sales Cloud environments. With this integration, you can:

- Create and join remote support sessions directly from ***Salesforce Cases***.
- Remotely access and control customers' devices for efficient troubleshooting and assistance.

This guide is intended for IT administrators and other professionals responsible for setting up the AnyDesk App for Salesforce Cloud. It provides step-by-step instructions on installation and configuration to ensure seamless integration. Additionally, the guide includes an overview of key features to help you maximize the AnyDesk's potential for efficient remote support within your Salesforce environment.

The document consists of the following chapters:

- Setting up AnyDesk on Salesforce – includes detailed instructions on setting up AnyDesk in Salesforce.
- Managing AnyDesk on Salesforce – provides instructions on how to manage AnyDesk in Salesforce.
- Using AnyDesk on Salesforce – provides instructions on how to use and manage AnyDesk in Salesforce.
- Troubleshooting Issues – includes steps on how to resolve common issues.

Configuring AnyDesk on Salesforce

Before you begin, ensure you have the following:

- AnyDesk Ultimate License
- **AnyDesk 9.0.1 or later** (custom client) for Windows
- **Salesforce add-on**

Step 1. Enable AnyDesk on Salesforce

Install AnyDesk

1 Download the AnyDesk app

   a Open Salesforce AppExchange.

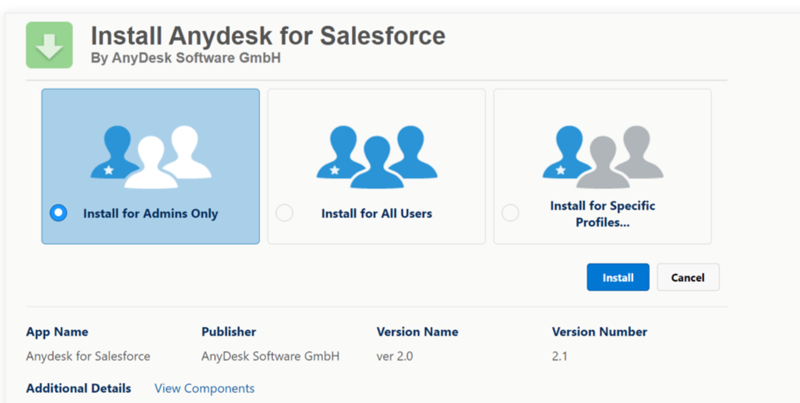
   b In the search bar, enter ***AnyDesk*** and press **Enter**.

   c On the **AnyDesk Listing** page, select **Get It Now** in the top right corner.

   d Follow the prompts to install AnyDesk for your Salesforce organization.

2 Select user access

   a After installation begins, select **Install for Admins Only**.



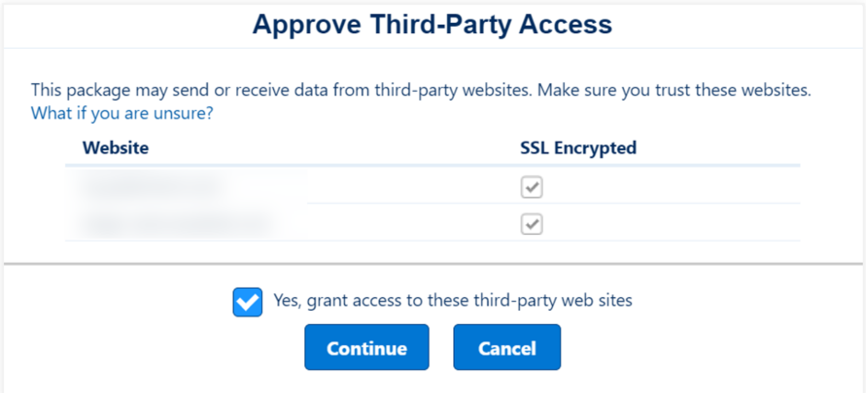
   b Select **Install** to proceed.

3 Grant third-party access

   a When prompted, a notification will appear requesting permission to allow AnyDesk to connect to third-party websites.

   b Check **Yes, grant access to these third-party websites.**

c Select **Continue** to proceed.

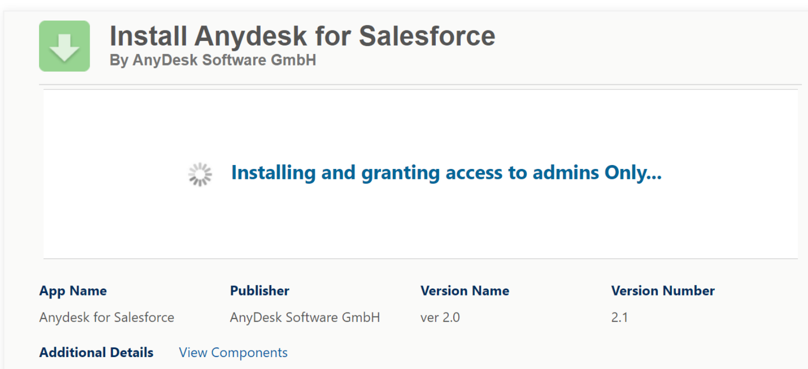


4 Complete installation

a The installation process may take a few minutes.

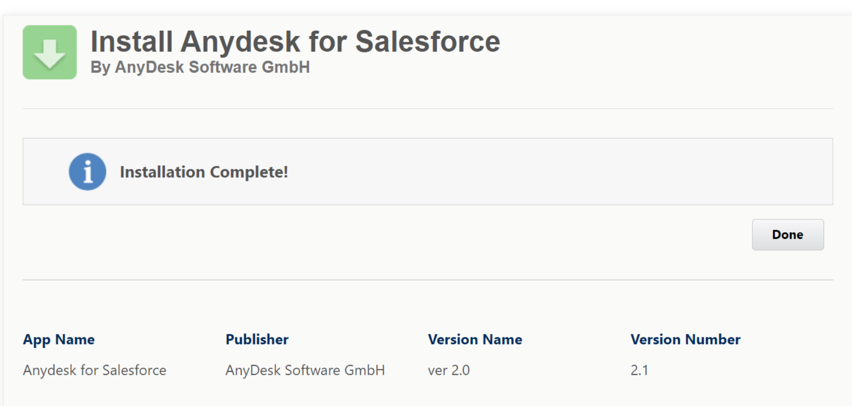
b A progress screen will display installation details, including:

- App Name
- Publisher
- Version Name
- Version Number



c When the installation is complete, a confirmation message will appear: *Installation Complete*.

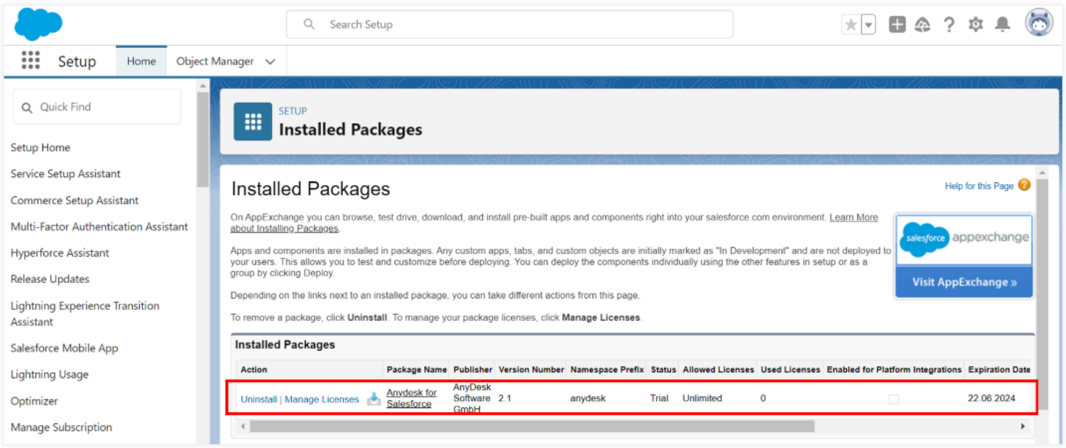
d Select **Done**.



5 Verify installation

Note: If the installation takes longer than expected, Salesforce will send an email notification.

a Selecting **Done** automatically redirects you to the **Installed Packages** section in Salesforce. This section lists all installed packages within your organization.



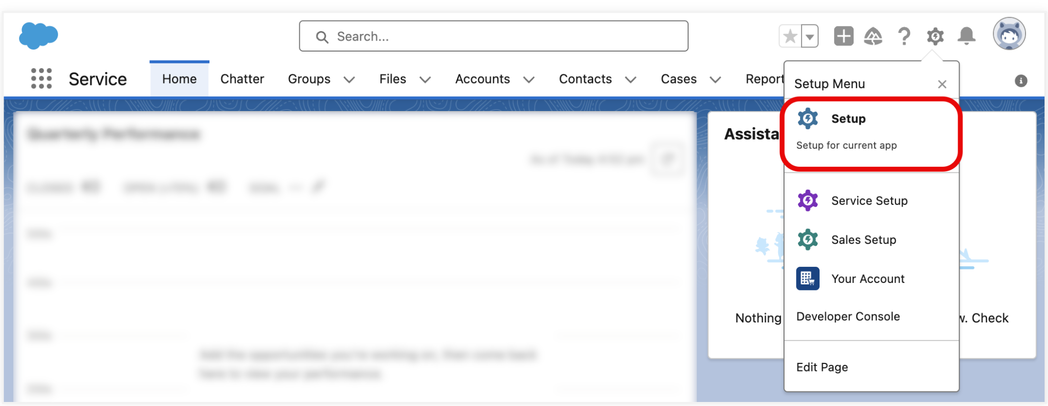
Grant Admin access for AnyDesk Setup

To configure the AnyDesk integration for Salesforce, the System Administrator needs specific permissions. These permissions allow them to access the necessary pages and perform actions such as authorization and configuration.

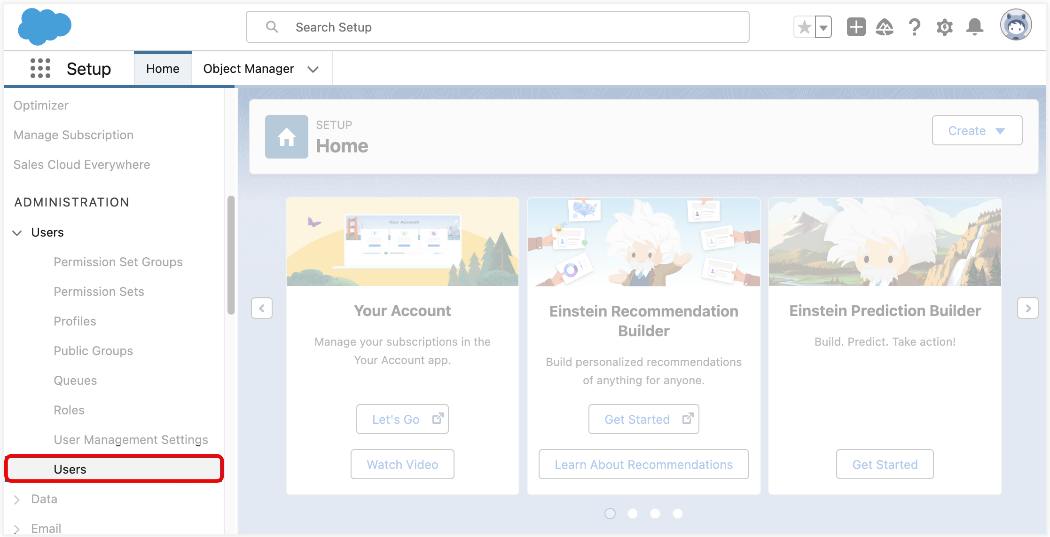
The AnyDesk package includes a permission set called **AnyDesk Admin**. Assigning this permission set to your administrator grants the required access to complete the AnyDesk setup.

To grant your Admin user the necessary permissions for AnyDesk setup, follow these steps:

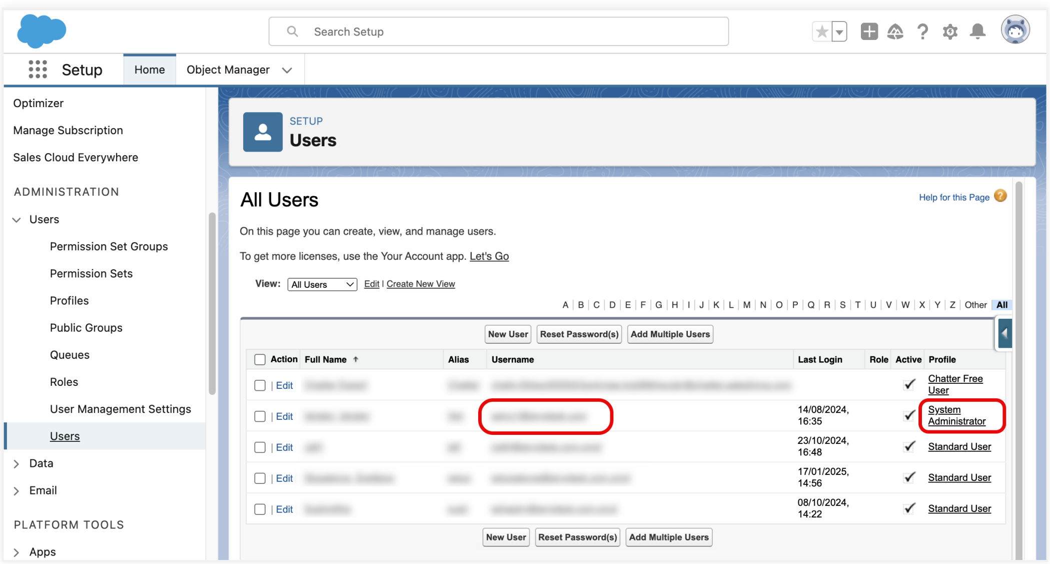
1 In **Salesforce**, in the top-right corner, click and then select **Setup.**



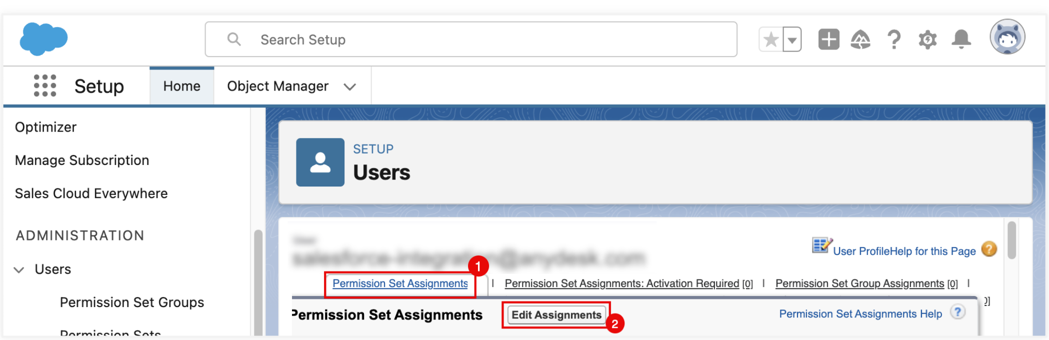
2 In the search bar, enter ***Users***.



3 In the **Users** list, locate the user with the **System Administrator** profile and select their **Username**.

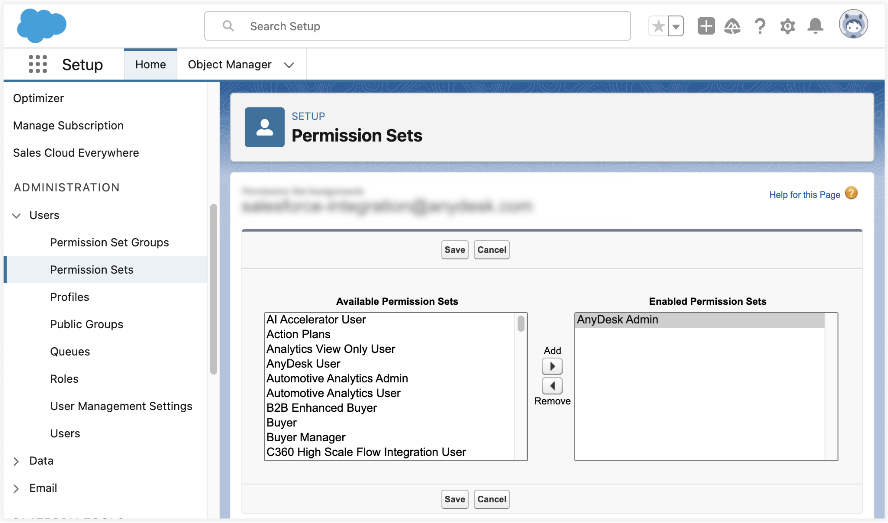


4 Scroll to the **Permission Set Assignments** section and select **Edit Assignments**.



5 In the **Available Permission Sets** list, find **AnyDesk Admin**.

6 Select **AnyDesk Admin**, then click **Add** to move it to **Enabled Permission Sets**.



7 Select **Save** to apply the changes.

AnyDesk Sections

After successfully installing the AnyDesk package and assigning permissions to the admin user, two new sections, **AnyDesk Setup** and **AnyDesk Requests**, become available in your Salesforce organization. You can access these features in Salesforce by clicking and using the **Search** bar.

- **AnyDesk Setup** – the *AnyDesk Setup* page allows the admin user to configure the AnyDesk integration. Here, the admin can complete all necessary steps to establish a functional connection between AnyDesk and Salesforce. The primary function of the AnyDesk Setup page is explained in Section 2.4.
- **AnyDesk Requests –** the *AnyDesk Requests* section enables users to manage AnyDesk remote support requests directly within Salesforce. For more details on this functionality, refer to Section 3.4.

Note

The **AnyDesk Setup** section is available only to administrators. Standard users will only see the **AnyDesk Request** section.

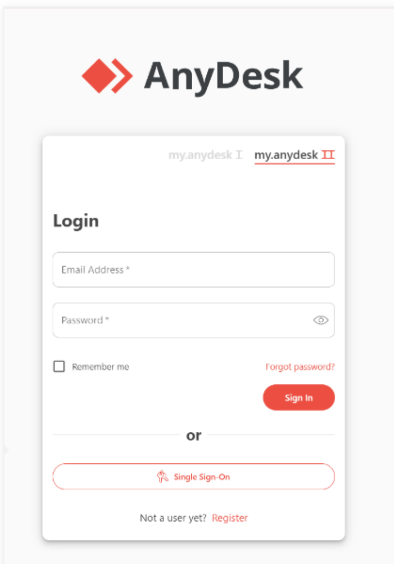
Step 2. Configure your AnyDesk account

To enable communication between Salesforce and AnyDesk, an administrator must register your Salesforce organization on my.anydesk II management portal. This process generates unique credentials, including a Client ID and Client Secret.

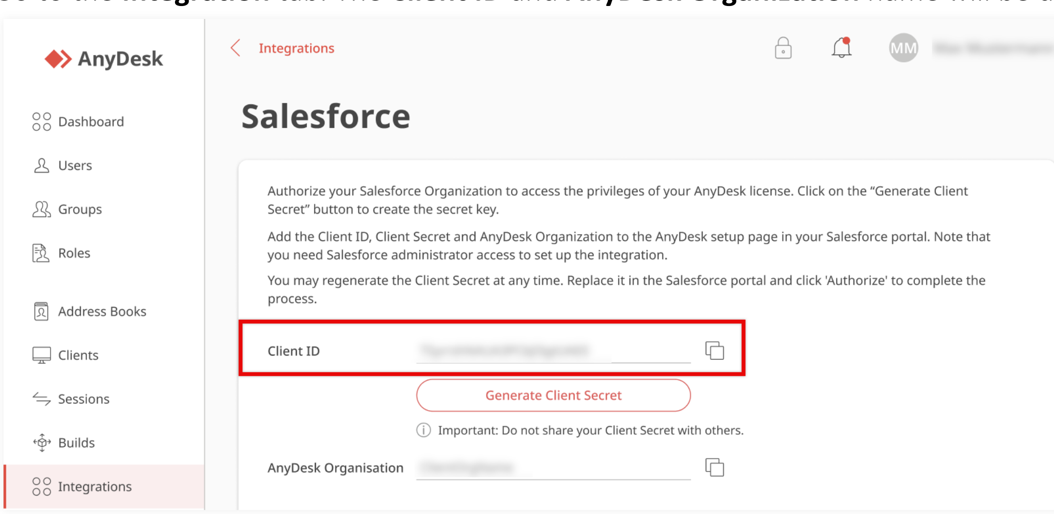
> **Note**
> Each Salesforce organization requires its own registration and credentials to ensure secure and isolated connections.

To register your Salesforce Organization on my.anydesk II:

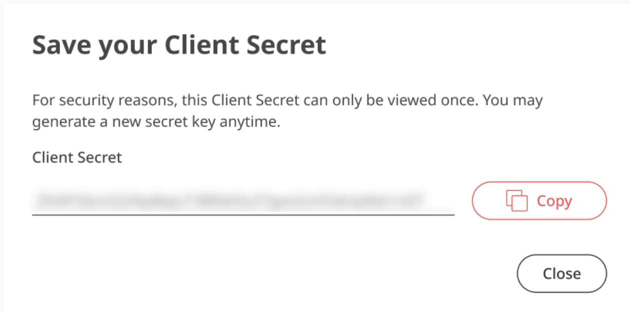
1 Navigate to my.anydesk II and log in with your AnyDesk username and password.



2 Go to the **Integration** tab. The **Client ID** and **AnyDesk Organization** name will be displayed here.



3 Click **Generate Client Secret** and save it.



4 Securely store your **Client ID**, **Client Secret** and **AnyDesk Organization** - you'll need them to connect Salesforce to AnyDesk in Step 3.

Step 3. Connect AnyDesk to Salesforce

To authenticate AnyDesk with Salesforce, you'll need your Client ID, Client Secret, and AnyDesk Organization from the previous section.

To authenticate AnyDesk with Salesforce:

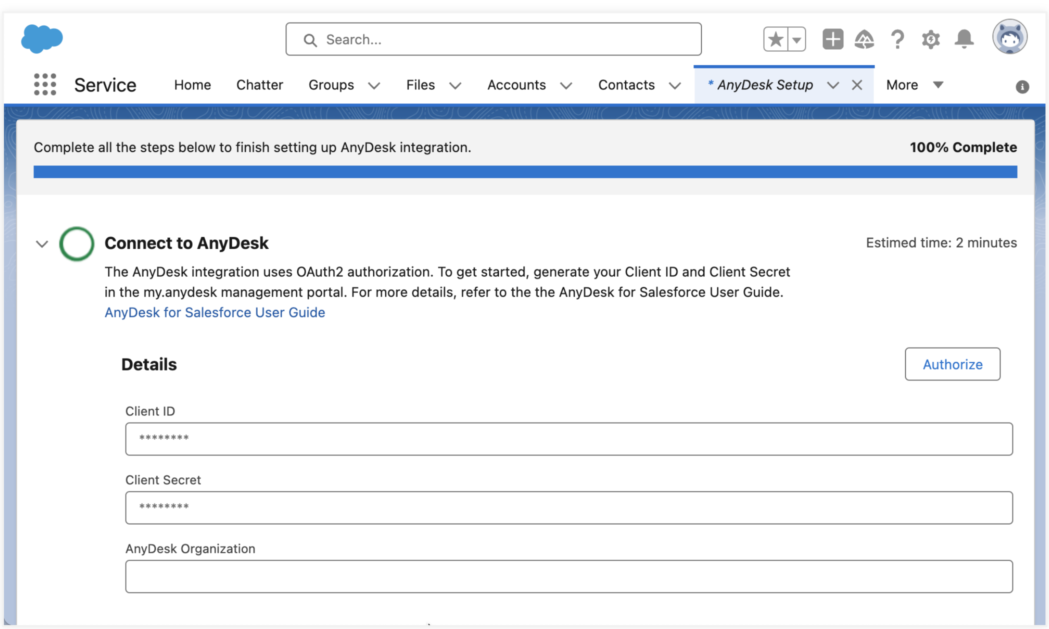
1 In **Salesforce**, click and search for *AnyDesk Setup*.

2 On the **AnyDesk Setup** page, provide the following details:

  a Client ID

  b Client Secret

  c AnyDesk Organization



3 Click **Authorize** to establish the connection between AnyDesk and Salesforce.

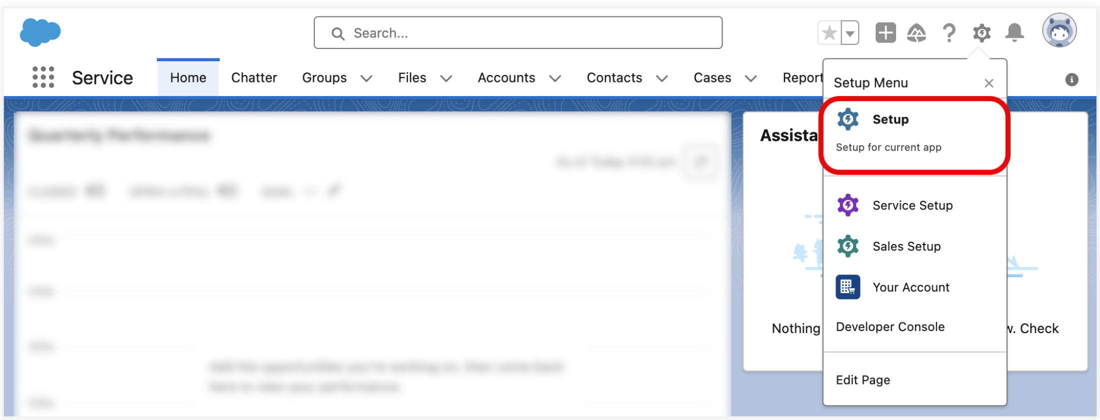
4 Once connected, a green connection status will appear, confirming the successful authorization with AnyDesk.

Step 4. Set up AnyDesk Case Lightning Page

To access the **AnyDesk Session Requests** within Salesforce Cases, the admin must set up the **Case Lightning** page.

Follow these steps to activate the page and add the AnyDesk component:

1 In **Salesforce**, in the top-right corner, click  and then select **Setup.**



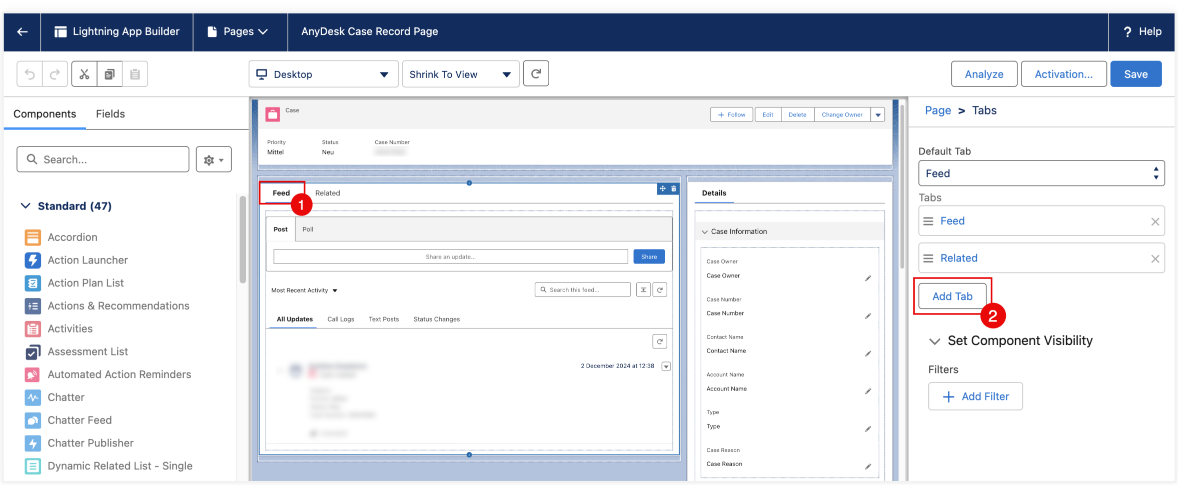
2 In the **Setup** menu, click **Object Manager**.

3 Select **Case** from the list of objects.

4 In the **Case** object menu, click **Lightning Record Pages**.

5 Select the record page you wish to modify and click **Edit**.

6 Select the component where you want to add the AnyDesk tab and click **Add Tab**.

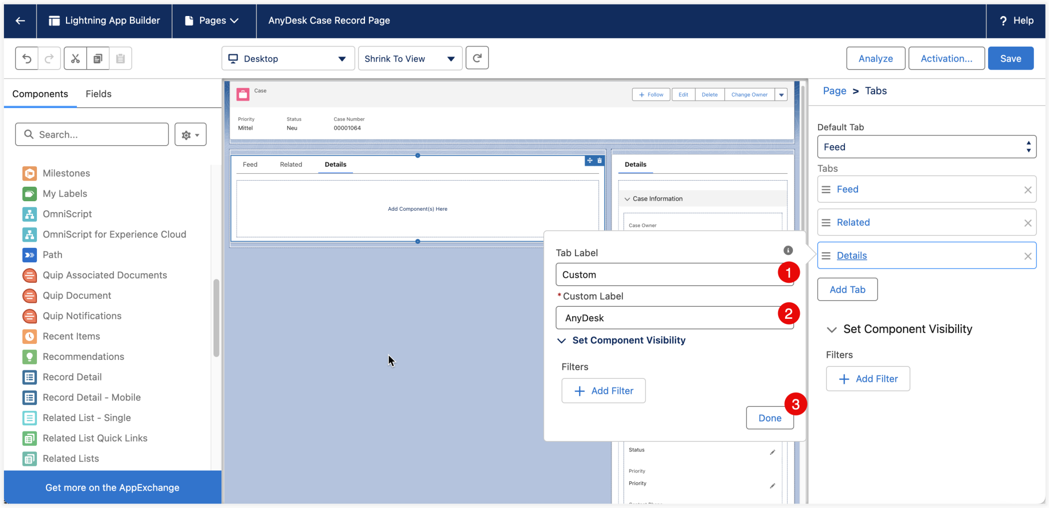


7 Provide the following information:

a In the **Tab Label** field, select **Custom**.

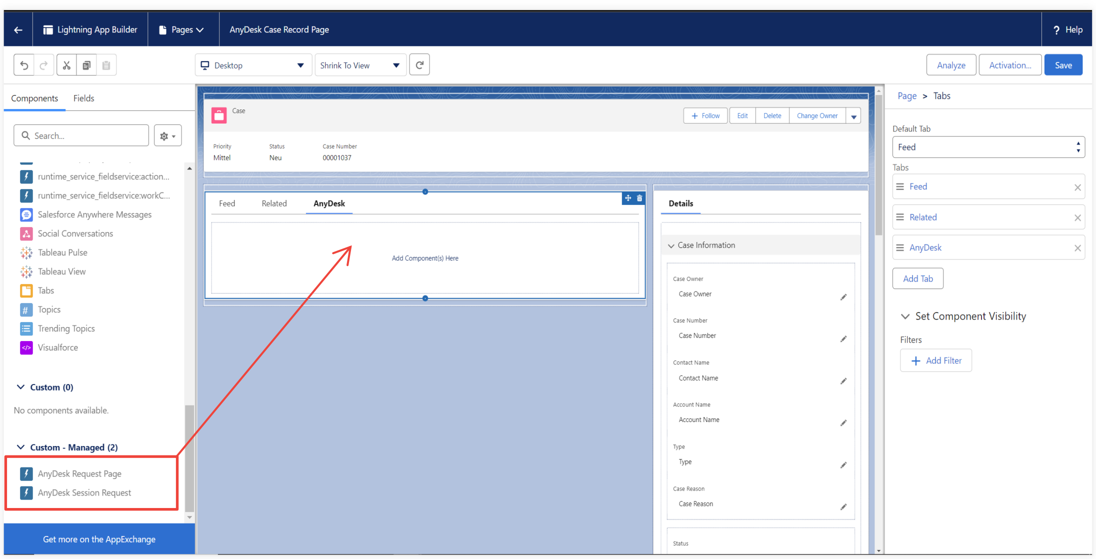
b In the **Custom Label** field, enter *AnyDesk*.

c Click **Done**.



8 From the left-hand menu, find the **Custom Managed** section.

9 Drag and drop the **AnyDesk Session Request** component into the newly created **AnyDesk** tab and click **Save**.



10 Select **Activate** to enable the page.

11 Click **Assign as Org Default**, choose **Desktop**, and **Save**.

> **Note**
>
> You can also add the **AnyDesk Request Page** as a component within your **AnyDesk Case Record Page** if needed.

Managing AnyDesk on Salesforce

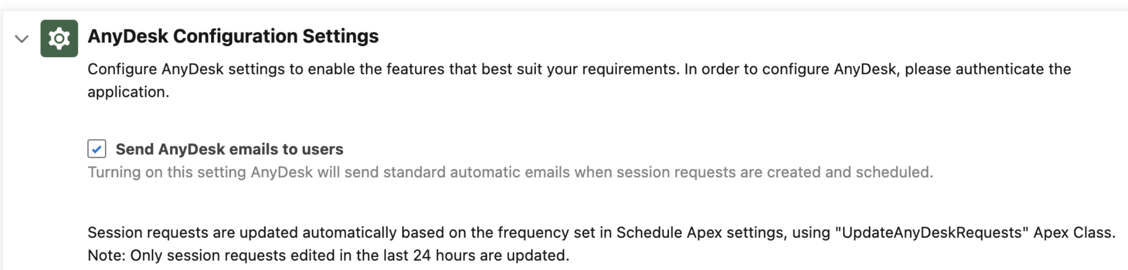
AnyDesk Configuration Settings

Admins can customize AnyDesk settings to align with their workflow. Before making any changes, ensure that AnyDesk is authenticated in Salesforce. See Step 2 and Step 3 in this guide for authentication instructions.

In the **Configuration Settings**, you can enable the feature to send automatic emails to contact users when a session request is created or scheduled.

To enable automatic email notifications:

1. In **Salesforce**, click and search *AnyDesk Setup.*
2. On the **AnyDesk Setup** page, navigate to the **AnyDesk Configuration Settings** section.
3. Select the **Send AnyDesk emails to users check box** to send emails to contact users when a session request is created or scheduled.



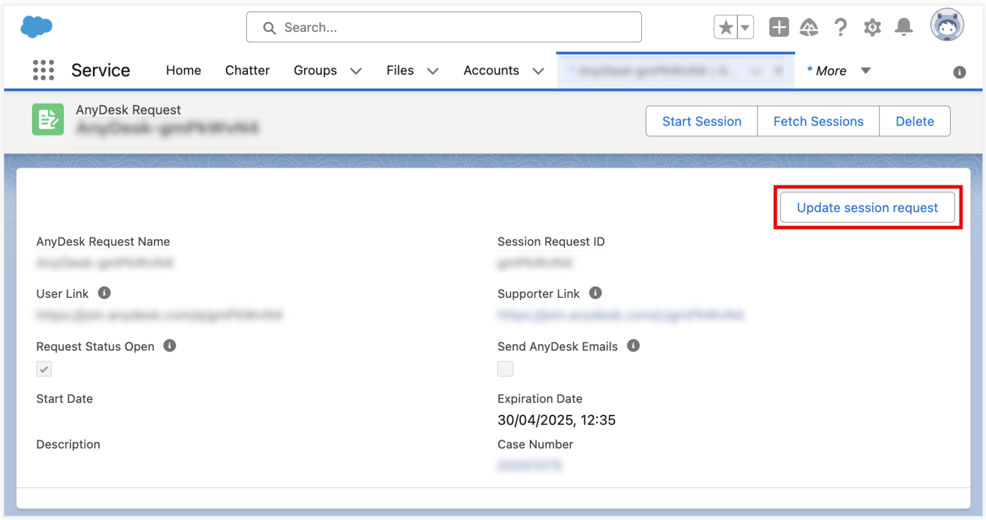
Set up a Scheduled Job for AnyDesk Requests

In Salesforce, Admins can schedule a job to automatically update AnyDesk Requests, ensuring data stays up to date without manual intervention. To ensure accurate reporting, configure the update job as soon as you start using AnyDesk and set it to run daily.

> **Note**
>
> The job only processes requests that were created or updated within the last 24 hours. Older requests will not be updated automatically.

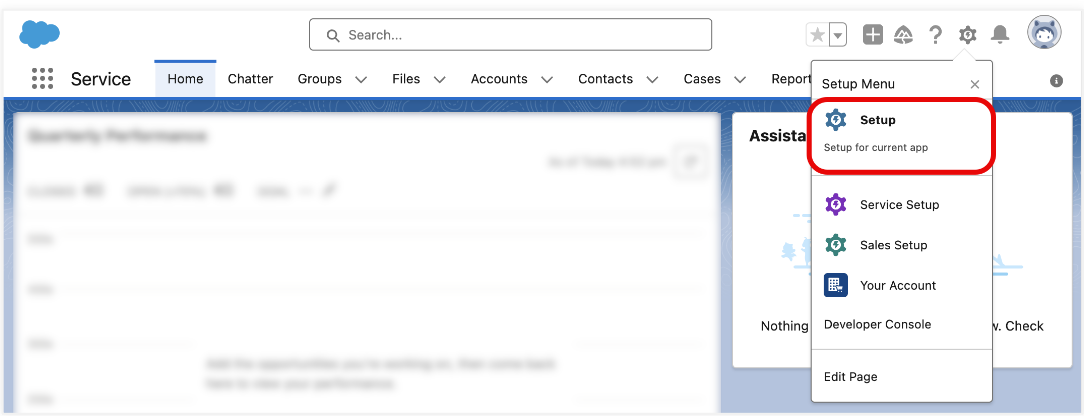
If the scheduled job is not configured, AnyDesk session request data will not update automatically.

You can manually update individual requests by clicking **Update session request** on the *AnyDesk Request* page.

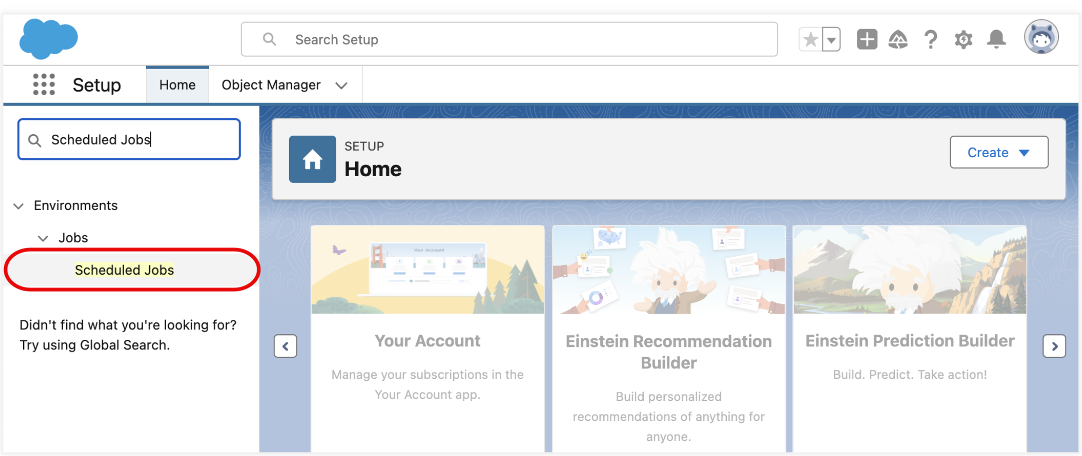


To schedule the automatic update job:

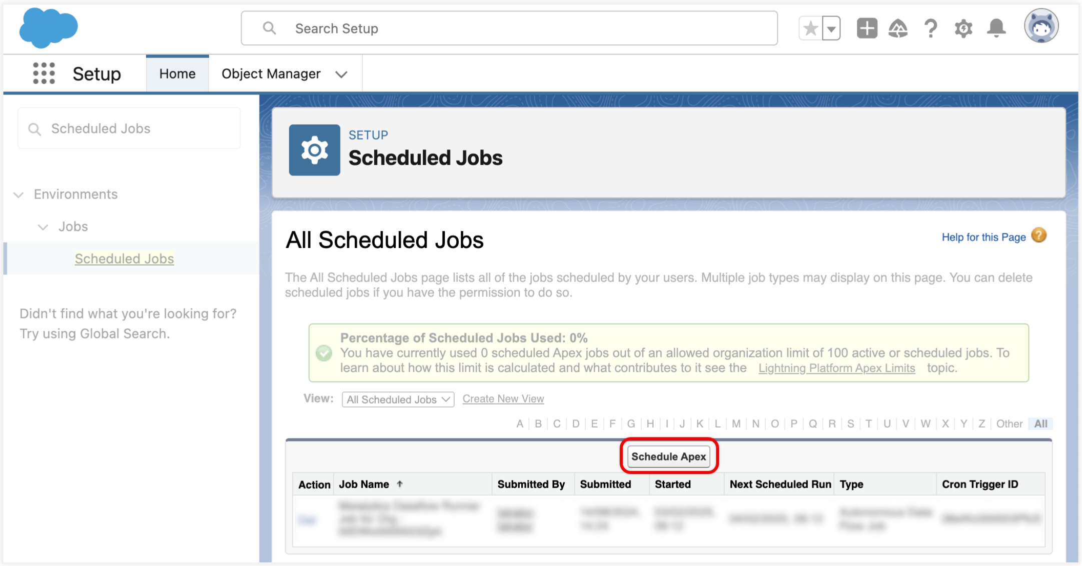
1 In **Salesforce**, in the top-right corner, click ⚙ and then select **Setup.**



2 In the search bar, enter *Scheduled Jobs*.



3 Click **Schedule Apex**.

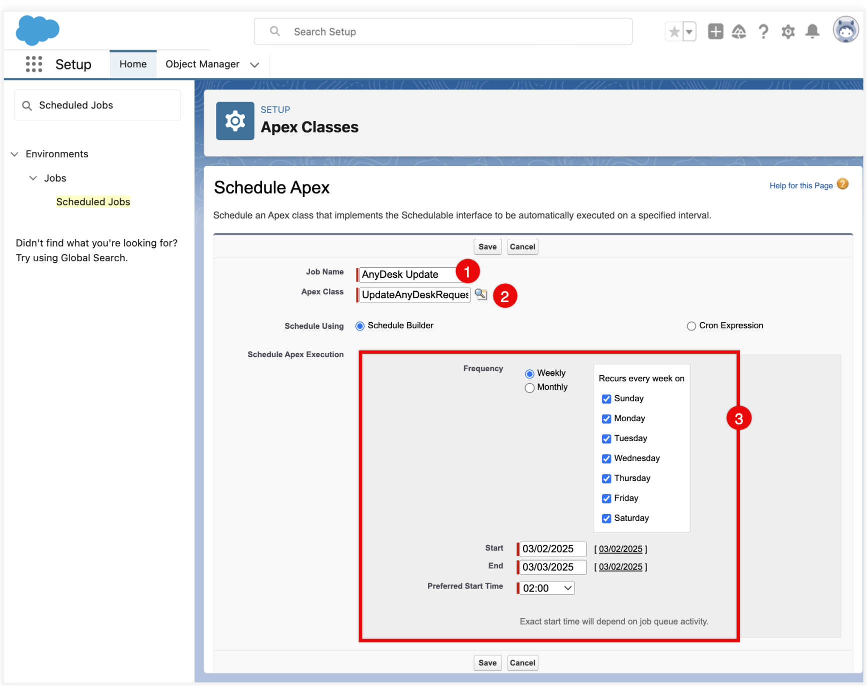


4 On the opened page, provide the following information:

a **Job Name** – enter *AnyDesk Update*.

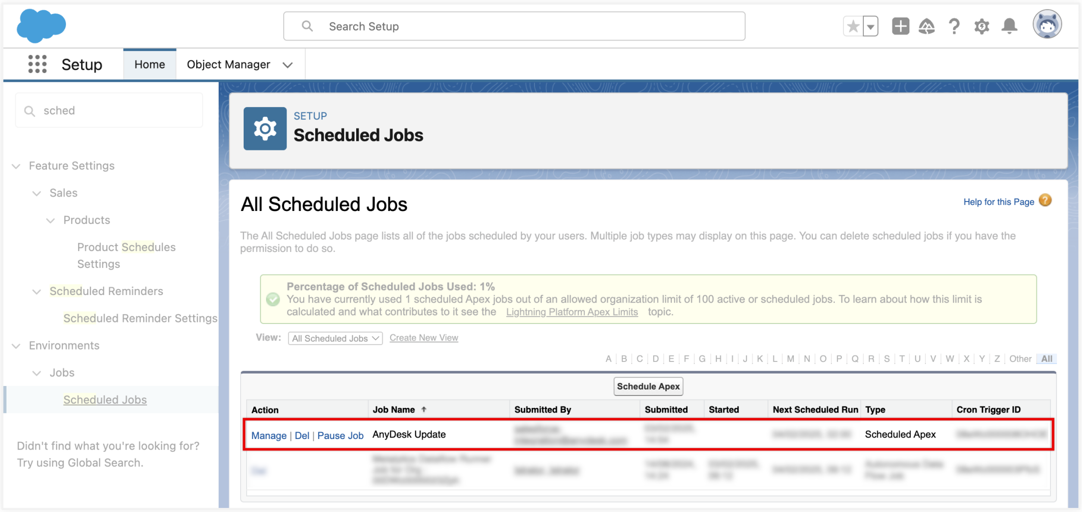
b **Apex Class** – select **UpdateAnyDeskRequests** from the list.

c **Schedule Apex Execution** – configure how often the updates should run (daily, weekly, or monthly) based on your needs.



5 Click **Save**.

6 The scheduled job will appear on the **Scheduled Jobs** page in Salesforce.



The job will now run automatically at the defined frequency, to keep AnyDesk Request page data accurate and up-to-date.

Uninstall AnyDesk from Salesforce

To uninstall AnyDesk, you must complete the following steps:

- Step 1. Revoke user permissions
- Step 2. Remove AnyDesk components
- Step 3. Uninstall the AnyDesk package

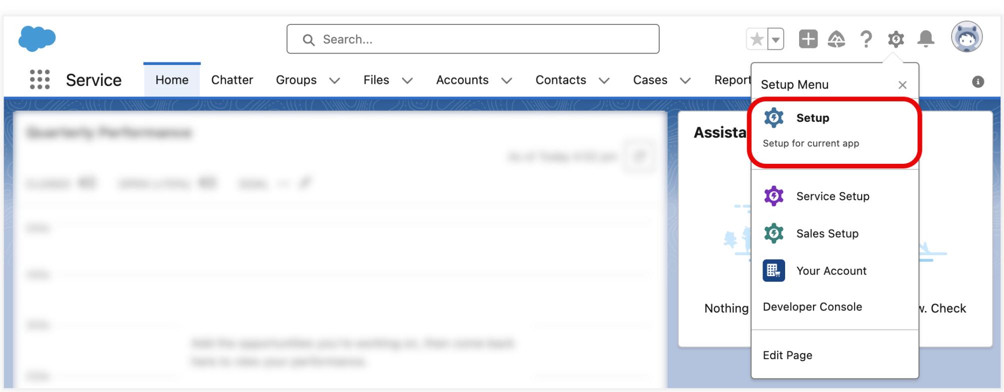
Step 1. Revoke user permissions

Unassign AnyDesk permission sets from users to revoke their access.

Step 2. Remove AnyDesk components

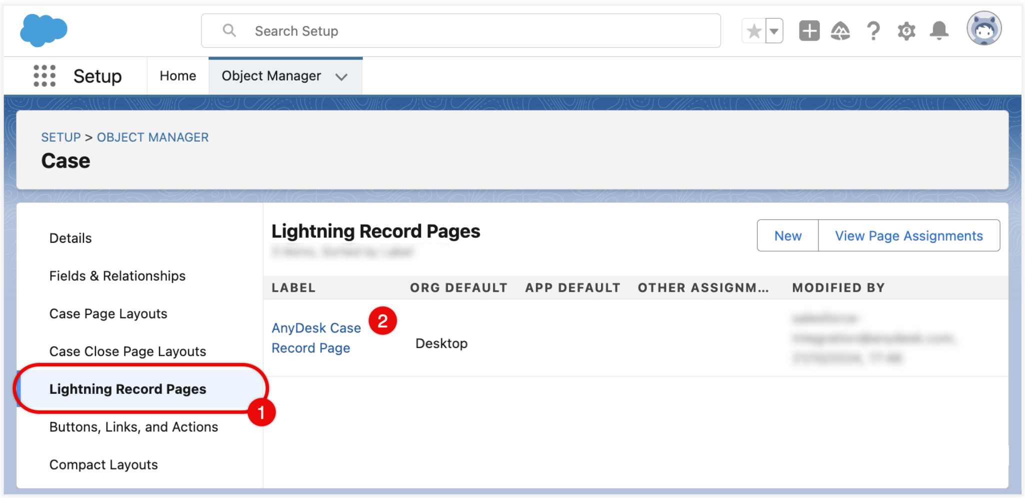
Remove any AnyDesk components from your Salesforce page layouts. To do that:

1 In **Salesforce**, in the top-right corner, click ⚙ and then select **Setup.**



2 In the search bar, enter *Object Manager*, and then select **Case** from the list of objects.

3 In the **Case** object menu, click **Lightning Record Pages** and then click the active case record page.



4 On the opened page, click **Edit**.

5 In the top-right corner, click **Activation…**.

6 Click **Remove as Org Default**.

7 Select the record page you wish to modify and click **Edit**.

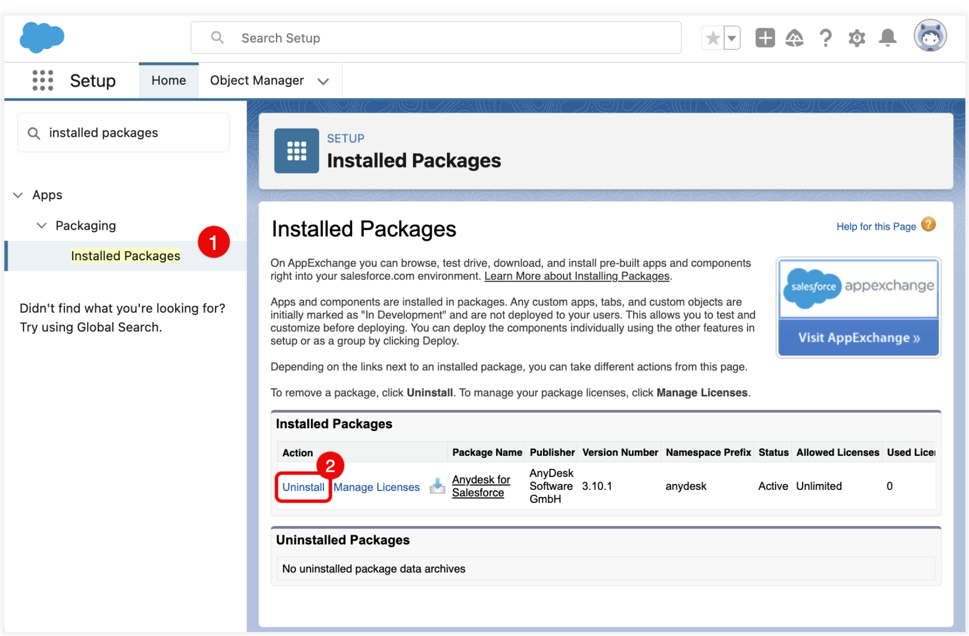
Step 3: Uninstall the AnyDesk package

After completing the steps above, proceed with uninstalling AnyDesk:

1 In **Salesforce**, in the top-right corner, click and then select **Setup.**

2 In the search bar, enter *Installed Packages.*

3 Locate AnyDesk in the package list and click **Uninstall**, then confirm the removal.



Using AnyDesk on Salesforce

Once the setup process is complete, Case Owners can access AnyDesk features directly within Salesforce. The Salesforce Case record page includes an **AnyDesk** tab for easy access to remote desktop functionalities.

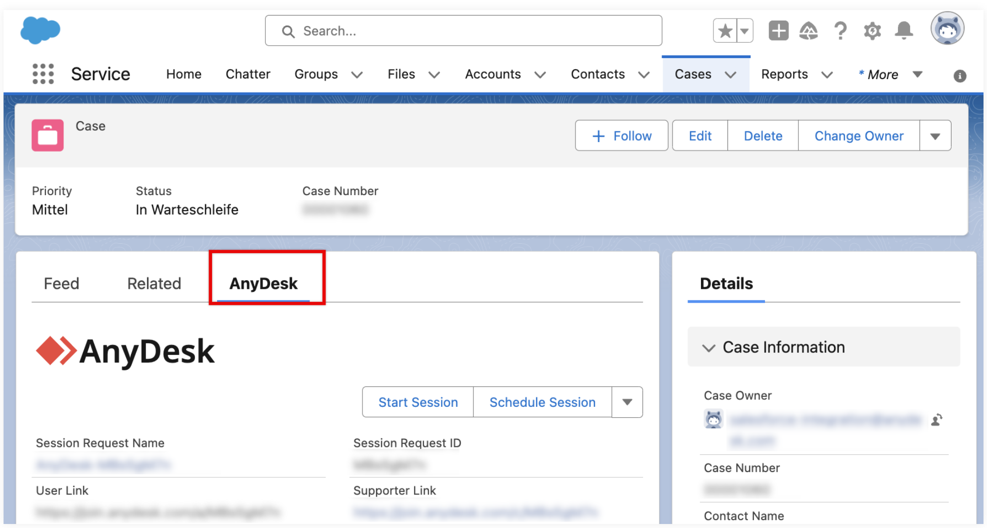
Connecting to the remote user

In order to connect to remote user's desktop to solve their issue, a support agent should complete the following steps:

Step 1. Access the AnyDesk tab in Salesforce

To access AnyDesk tab:

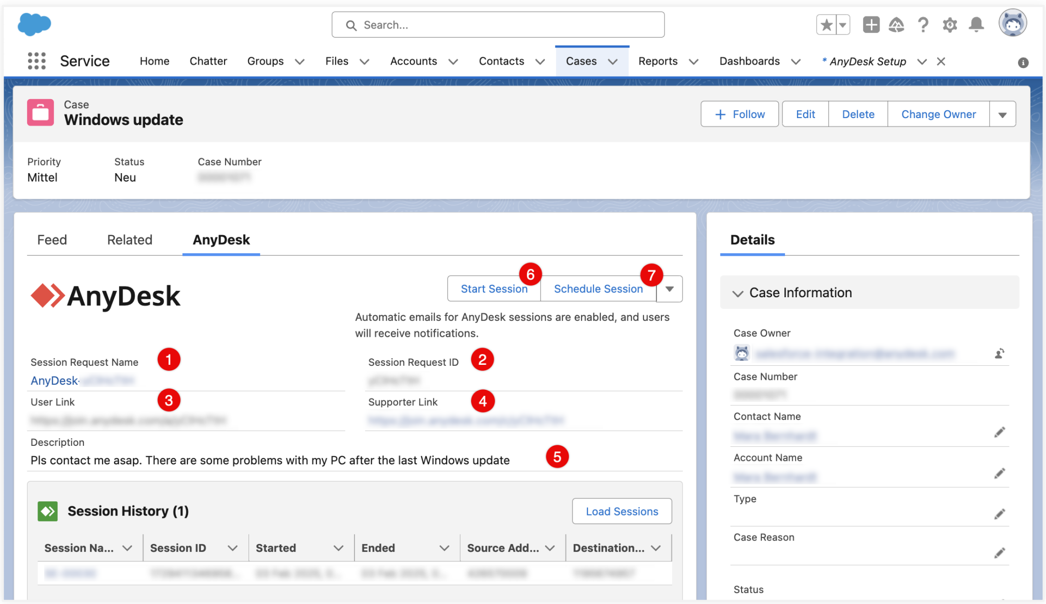
- Open the **Salesforce Case** page and navigate to the **AnyDesk** tab.



Step 2. Create a Session Request from Salesforce Cases

1. On the opened **Salesforce Case** page, click **Create New Session Request**.
2. Review the **Session Details**:
   - **Request Name** – begins with *AnyDesk* followed by a unique 8-digit alphanumeric Request ID. Click to view detailed request information.
   - **Request ID** – a unique identifier for tracking the request.
   - **User Link** – a link for the remote user to download AnyDesk and connect to the session. The link expires 24 hours after scheduling.

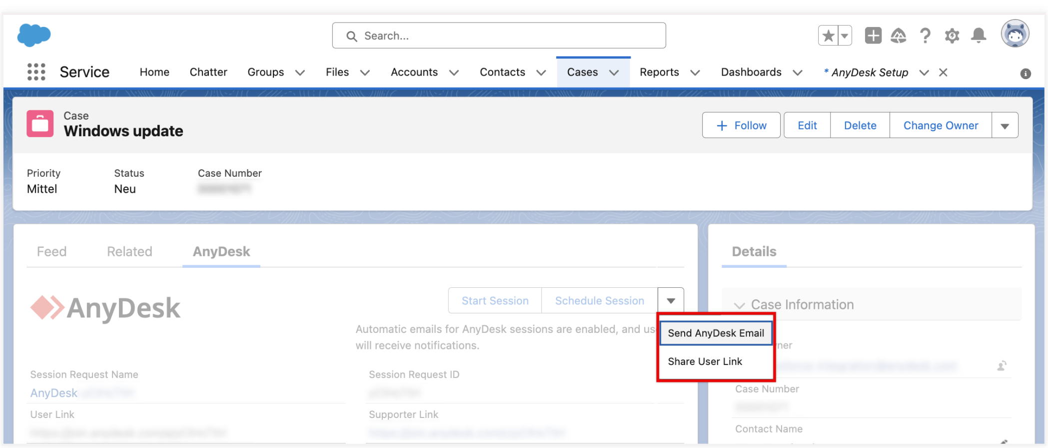
- **Supporter Link** – a link for the support agent to launch AnyDesk and initiate the session.
- **Description** – displays the Salesforce ticket description.
- **Start Session** – initiates the session for the support agent, prompting them to open AnyDesk and wait for the remote user to join.
- **Schedule Date** – allows the support agent to schedule the session.



Step 3. Share the User Link

You can share the link to the remote session with the end user by clicking and using one of the following options:

- **Copy User Link** – copies the link to the clipboard.
- **Send Email** – sends an email with session details and the link. The email language is determined by the user's Locale setting in Salesforce:
  - **a** German if the locale is set to German (Country).
  - **b** English for all other locales.



Step 4. Start the remote session

To begin the session:

1 Click **Start Session** or use the **Supporter Link** to open AnyDesk.

2 Once the remote user is ready, click **Connect** in the AnyDesk client.

Manage Session Requests

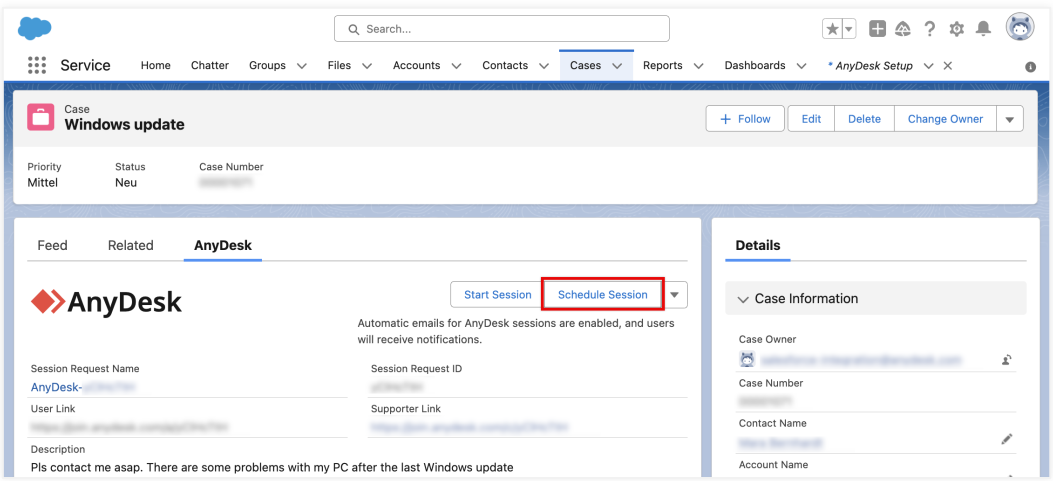
You can manage session requests on Salesforce.

Schedule a session request

Support agents can schedule a remote support session in advance. To schedule a session:

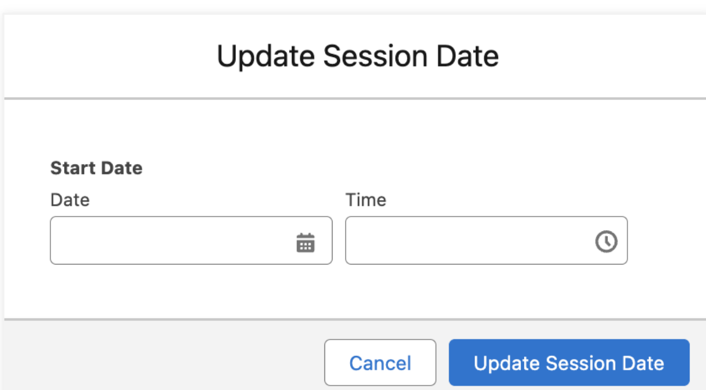
1 On the **Salesforce Case** page, navigate to the **AnyDesk** tab.

2 Click **Schedule Date**.

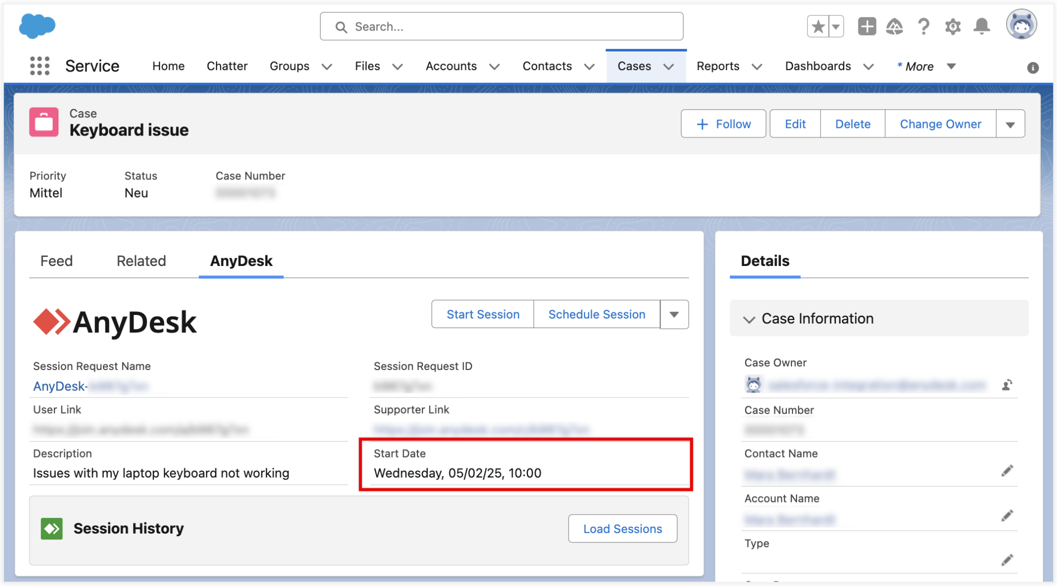


Note: If no session exists, click **Create New Session Request.**

3 Select a date and time for the session and then click **Update Session Date**.



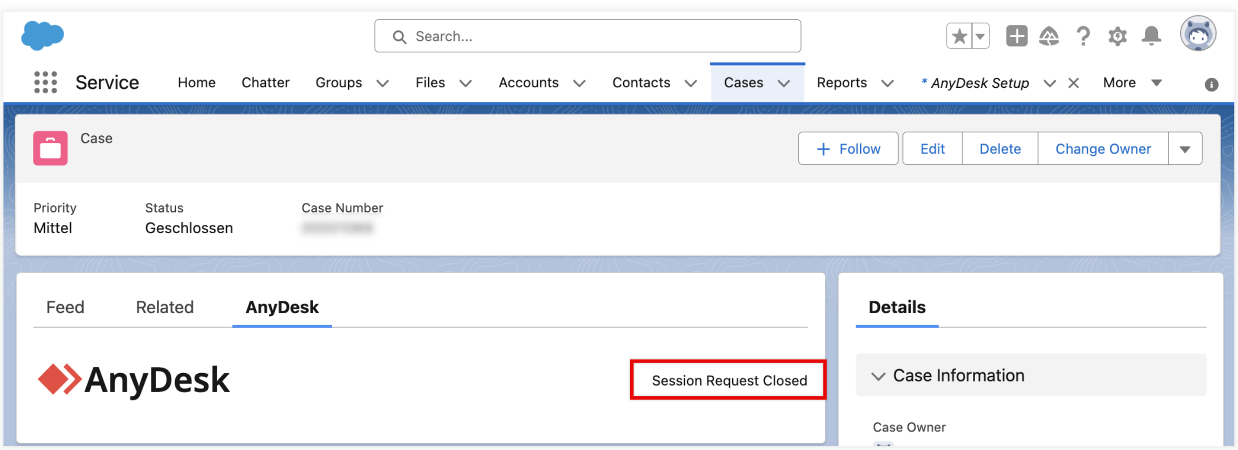
4 The scheduled start time will be displayed for the support agent's reference.



> **Note**
>
> Scheduled sessions expire 24 hours after the scheduled start time.

Close a session request

When a Case is closed, its corresponding AnyDesk session is automatically closed. If a previously closed Case is reopened, the AnyDesk session can also be reopened.

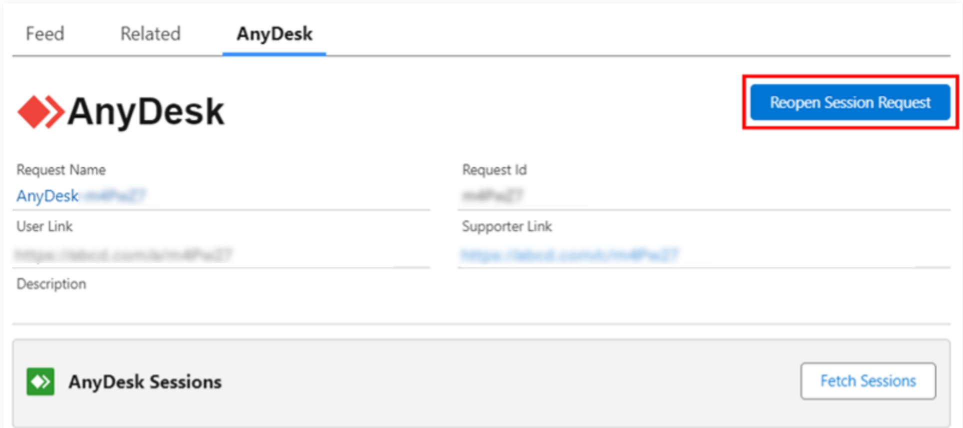


Reopen the session request

If a session request is closed but the associated Case is reopened, the support agent can reopen the session request as well:

1 On the **Salesforce Case** page, navigate to the **AnyDesk** tab.

2 Click **Reopen Session Request**.



Note

Reopening an expired case extends the session request by 24 hours.

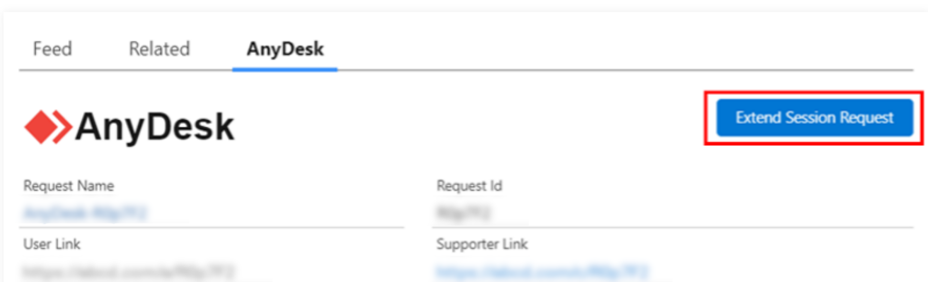
Extend the session request

If a session request expires while the associated case remains open, the supporter can extend the session by 24 hours. To extend the session, the supporter needs to:

If a session request expires but the associated Case remains open, the support agent can extend the session by 24 hours:

1 On the **Salesforce Case** page, navigate to the **AnyDesk** tab.

2 Click **Extend Session Request**.



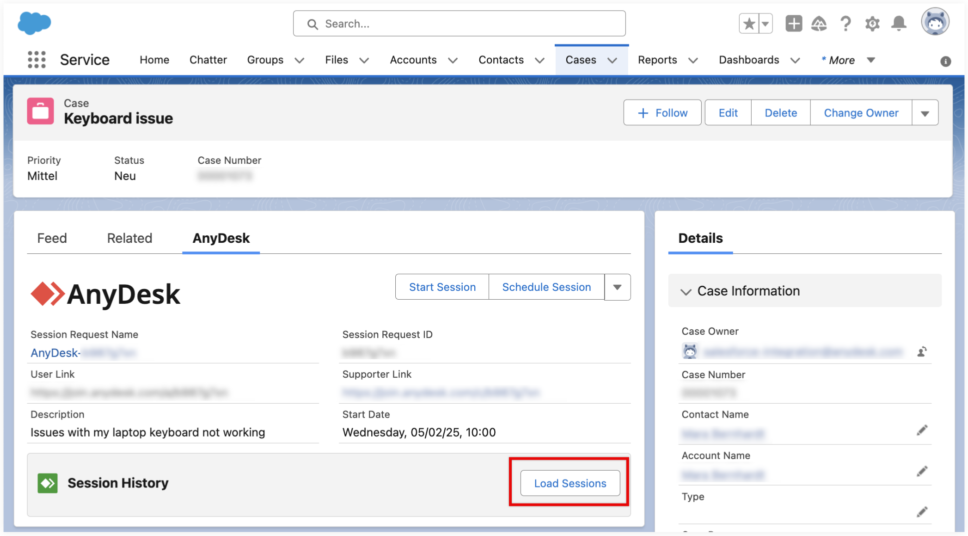
Load all sessions

Loading sessions displays all related session data from the AnyDesk platform and updates corresponding fields in Salesforce.

Support agents can retrieve sessions associated with a specific session ID:

1 On the **Salesforce Case** record page, open the **AnyDesk** tab.

2 In the **AnyDesk Sessions** section, click **Load Sessions**.



> **Note**
>
> Always click **Load Sessions** to retrieve the latest session data.

Delete the session request

AnyDesk Admins can delete session requests.

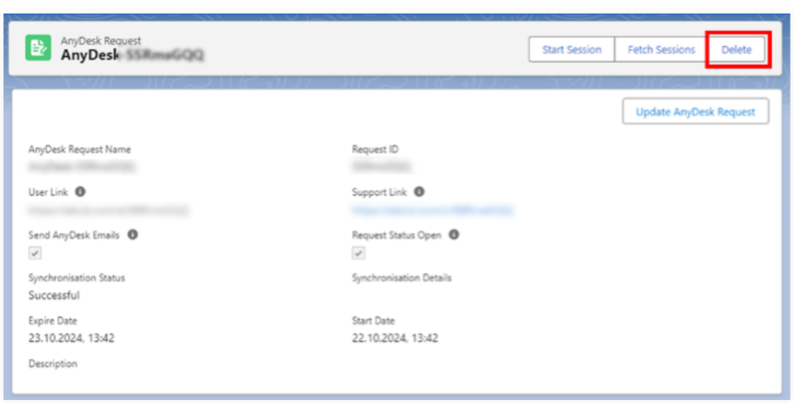
> **Note**
>
> Only users with AnyDesk Admin roles can delete session requests. AnyDesk User roles do not have this permission.

To do so:

1 In **Salesforce**, click and navigate to **AnyDesk Request**.

2 Locate the request to delete.

3 In the top-right corner, click **Delete**.

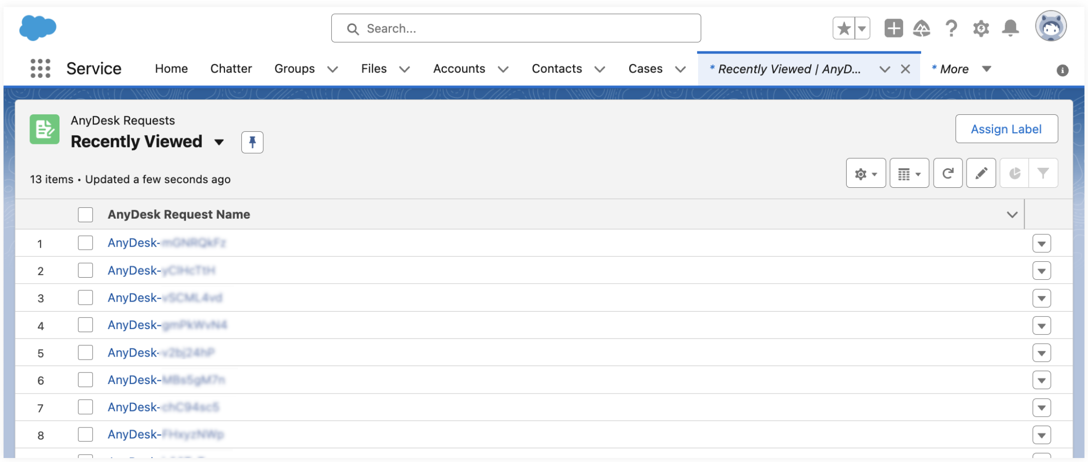


4 In the opened window, click **Delete** to confirm.

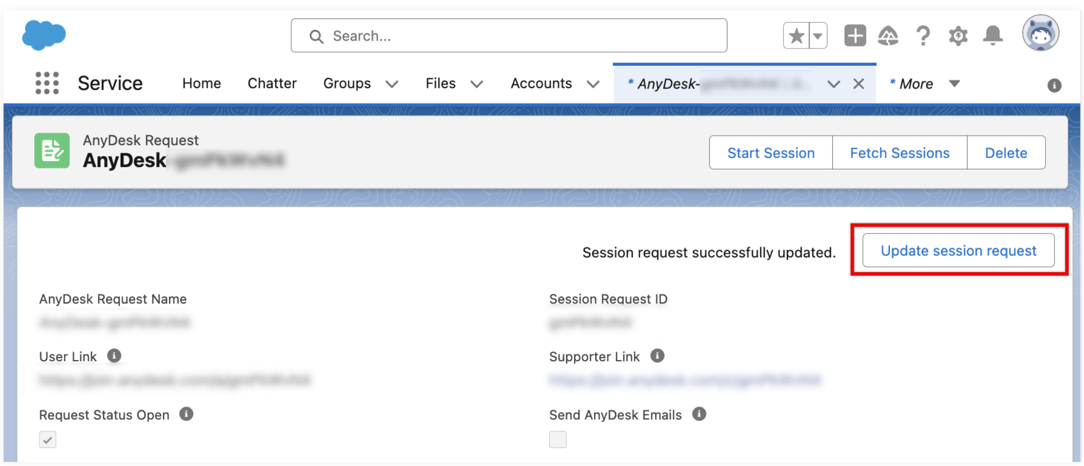
View all session requests and session details

Once an AnyDesk request is created or updated, you can view session details:

1. In **Salesforce**, click and navigate to **AnyDesk Request**.
2. View the list of created AnyDesk Session Requests.



3. Click a request to see its details.
4. Click **Update AnyDesk Request** to refresh session data.



Troubleshooting Issues

If you experience any issues, follow these steps to resolve common problems.

1. **Review this User Guide** – ensure that all steps in the integration guide have been followed correctly.
2. **Visit AnyDesk Help Center** – check the Help Center for common issues and FAQs.
3. **Verify System Status** – visit the AnyDesk Status page to confirm there are no ongoing service disruptions.
4. **Contact Support** – if the issue persist, submit a ticket via the Help & Contact section in my.anydesk II management portal or reach out to AnyDesk Support.

AnyDesk

About **AnyDesk**

AnyDesk is a remote desktop software that allows users to access and control a computer from a remote location. It was first released in 2014 and has since gained popularity as a reliable and secure remote desktop solution.

Resources

Learn more about how to get started with AnyDesk in our Help Center

Watch our tutorial videos on how to use AnyDesk

Discover interesting use cases

Join our community

anydesk.com