

AnyDesk for Salesforce

Integration Guide

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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:

- <u>Setting up AnyDesk on Salesforce</u> includes detailed instructions on setting up AnyDesk in Salesforce.
- <u>Managing AnyDesk on Salesforce</u> provides instructions on how to manage AnyDesk in Salesforce.
- <u>Using AnyDesk on Salesforce</u> provides instructions on how to use and manage AnyDesk in Salesforce.
- <u>Troubleshooting Issues</u> 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 <u>Salesforce AppExchange</u>.
 - **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**.

Anydesk for Sal Software GmbH	esforce	
ins Only	for All Users	Install for Specific Profiles
		Install Cancel
Publisher	Version Name	Version Number
	Anydesk for Sal Software GmbH	Anydesk for Salestorce Software GmbH

- **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.

		Approve Third-Party Access
Thi Wł	s package may se nat if you are unsu	end or receive data from third-party websites. Make sure you trust these websites. ure?
	Website	SSL Encrypted
		\checkmark
		\checkmark
		Yes, grant access to these third-party web sites Continue Cancel

- 4 Complete installation
 - a The installation process may take a few minutes.
 - **b** A progress screen will display installation details, including:
 - App Name
 - o Publisher

d

- o Version Name
- Version Number

Install Anydesk for Salesforce By AnyDesk Software GmbH								
بلان	Installing and gran	nting access to adj	mins Only					
بلاد	e instannig and gran		inis only					
තා App Name	Publisher	Version Name	Version Number					

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

 Install Anydesk for Salesforce

 By AnyDesk Software GmbH

 Installation Complete!

 Done

 App Name
 Publisher

 Anydesk for Salesforce

 Anydesk for Salesforce



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.

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Setup	Home	Object Manager 🗸 🗸
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Manage Subscription	1	
Sales Cloud Everywh	ere	03613
ADMINISTRATION		
✓ Users		Permission Set Assignments
Permission Se	et Groups	Permission Set Assignments
Dormission Co	***	

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 **iii** 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 <u>my.anydesk II</u> 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 <u>my.anydesk II</u> and log in with your AnyDesk username and password.

	my.anydesk I	my.anydesk 工
Login		
Email Address *		
Password *		٢
Remember me		Forgot password
		Sign In
	or	
	🎋 Single Sign-On	

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

🔶 AnyDesk	< Integrations
$^{\circ\circ}_{\circ\circ}$ Dashboard	Salesforce
오 Users	
公 Groups	Authorize your Salesforce Organization to access the privileges of your AnyDesk license. Click on the "Generate Client Secret" button to create the secret key.
ि Roles	Add the Client ID, Client Secret and AnyDesk Organization to the AnyDesk setup page in your Salesforce portal. Note that you need Salesforce administrator access to set up the integration.
_	You may regenerate the Client Secret at any time. Replace it in the Salesforce portal and click 'Authorize' to complete the process.
থ্ Address Books	
Clients	Client ID
← Sessions	Generate Client Secret
ဗၨာၞိ→ Builds	① Important: Do not share your Client Secret with others.
00 Integrations	AnyDesk Organisation



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 <u>Step 3</u>.

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 **iii** and search for *AnyDesk Setup*.
- 2 On the **AnyDesk Setup** page, provide the following details:
 - a Client ID
 - b Client Secret
 - c AnyDesk Organization

Service	e Home	Chatter	Q Se Grou	earch ps ∨	Files	~	Accounts	~	Conta	cts 🗸	* Anj	vDesk Set	up v	▲	? More	¢.	6
Complete all th	e steps below t	o finish set	ting up	AnvDes	c integra	tion.			MH () ;	SJC/			MH (C - 2)	iy) (1(00% Ca	omplete
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,,y			Suide												_		
	Details															Authori	ze
	Client ID																

	Client Secret																

	AnyDesk Organiz	zation															
Í																	

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**.

Q Search		★ - ■ @ ? \$	🏚 👩
Service Home Chatter Groups V Files V Accounts V Contacts V Case	s 🗸 Report	Setup Menu ×	0
	Assista	Setup Setup for current app	
		Service Setup	
	*1	Sales Setup	
		Your Account	
	Nothing	Developer Console	v. Check
		Edit Page	

- 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**.

÷	🛅 Lightning App Builder 📑 P	ages 🗸	AnyDesk Case Record Page				? Help
5		D D	esktop 🔹 Shrink To View 💌 Cł			Analyze Activation	Save
Comp	onents Fields		Case		+ Follow Edit Delete Change Owner 💌	Page > Tabs	
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~ s	Standard (47)	Fee	Related	- 6	Details	Tabs	
в	Accordion	Por	R Pol			Feed	×
5	Action Launcher		Share an update Share	1	Case Owner	■ Related	×
8	Action Plan List	Mos	t Recent Activity 🔻 🔍 Search this feed		Case Ouner		
÷≡	Actions & Recommendations		Il Herdatan Chillions Text Baster Status Channes	-	Case Number Case Number		
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9	Assessment List				Contact Name	• oct oomponent visibility	
*	Automated Action Reminders		2 December 2024 at 12738	×	Account Name	Filters	
~	Chatter				Account Name	+ Add Filter	
	Chatter Feed				Type		
4	Chatter Publisher				Case Reserve		
	Dynamic Related List - Single		•		Case Reason		



- **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**.

← 🖬 Lightning App Builder 🕒 Pages	AnyDesk Case Record Page		? Help
5 C X 0 0	Desktop		Analyze Activation Save
Components Fields	Case		Page > Tabs
			Default Tab
Q, Search	Priority Status Case Number Mittel Neu 00001037		Feed
runtime service fieldservice:action			Tabs
f runtime_service_fieldservice:workC			≡ Feed ×
Salesforce Anywhere Messages	Feed Related AnyDesk	Details	= Belated ×
A Social Conversations			
🔅 Tableau Pulse			≡ AnyDesk ×
Tableau View		4	Add Tab
Tabs		Case Owner	Add tab
# Topics		· · · ·	>< Set Component Viribility
Trending Topics		Case Number	- Set component visionity
Visualforce			Filters
		Contact Name	+ Add Filter
 Custom (0) 		Contact Name	
No components available.		Account Name	
		Account Name	
✓ Custom - Managed (2)		Type	
Contract Design		Type	
AnyDesk Request Page		Case Reason	
Phylicisk Session Request		Case Reason	
-			
Get more on the AppExchange		Status	

- **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 <u>Step 2</u> and <u>Step 3</u> 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.

Q Sea	arch	** 🗄 🌧 ? 🌣 🖡 👼
Service Home Chatter G	iroups 🗸 Files 🗸 Accounts 🗸	* More 🔻 🕚
AnyDesk Request		Start Session Fetch Sessions Delete
		Update session request
AnyDesk Request Name	Session Re	quest ID
User Link 0	Supporter I	Link 0
Request Status Open 0	Send AnyD	esk Emails 🕚
Start Date	Expiration I 30/04/202	Date 25, 12:35
Description	Case Numb	ber

To schedule the automatic update job:

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

	Q Search		*• • • •	
Service Home Chatter	Groups 🗸 Files 🗸 Accounts 🗸 Contac	ts 🗸 Cases 🗸 Repo	n Setup Menu ×	0
	SHELVIO <i>HE DE CUIE</i> AREEN VIOHE	Assista	Setup	
0 0			Service Setup	
-			Sales Setup	
-			Your Account	-
		Nothin	g Developer Console	v. Check
			Edit Page	

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





3 Click **Schedule Apex**.

	2. Search Setup 🖈 🛛 🖶 🚓 ? 🌣 🐥 🧒
Setup Home Object	Manager 🗸
Q Scheduled Jobs	SETUP Scheduled Jobs
✓ Environments	
\vee Jobs	
Scheduled Jobs	All Scheduled Jobs
Didn't find what you're looking for? Try using Global Search.	The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so. Percentage of Scheduled Jobs Used: 0% Vou have currently used 0 scheduled Apex jobs out of an allowed organization limit of 100 active or scheduled jobs. To learn about how this limit is calculated and what contributes to it see the Lightning Platform Apex Limita topic.
	View: [All Scheduled Jobs ∽] <u>Create New View</u>
	A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All
	Schedule Apex
	Action Job Name † Submitted By Submitted Started Next Scheduled Run Type Cron Trigger ID
	The Management Landson and Management an

- **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.

Setup Home Object	Q Search Setup ★ 🖬 🚓 ? 🌣 🐥 🤇
Q Scheduled Jobs	SETUP Apex Classes
 Environments 	
✓ Jobs Scheduled Jobs	Schedule Apex Help for this Page
	Schedule an Apex class that implements the Schedulable interface to be automatically executed on a specified interval.
Didn't find what you're looking for? Try using Global Search.	Save Cancel
	Job Name AnyDesk Update 1 Apex Class UpdateAnyDeskReques S 2
	Schedule Using Schedule Builder Oron Expression
	Schedule Apex Execution Frequency Weekly Notify Recurs every week on
	Z Sunday Z Monday 3
	⊘ Idesaay ⊘ Wednesday
	🖉 Thursday
	⊘ Friday ⊘ Saturday
	Start 03/02/2025 [03/02/2025]
	Preferred Start Time 02:00 V
	Exact start time will depend on job queue activity.
	Save Cancel

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:

- <u>Step 1. Revoke user permissions</u>
- <u>Step 2. Remove AnyDesk components</u>
- <u>Step 3. Uninstall the AnyDesk package</u>

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.

۹	Search Setup			*		\$? \$	à	6
Setup Home Object	ct Manager 🗸 🗸								
SETUP > OBJECT MANAGER Case									
Details	Lightning Reco	ord Pages		(New	View	Page	Assignm	ents
Fields & Relationships	LABEL	ORG DEFAULT	APP DEFAULT	OTHER ASSIGNM	мос	IFIED	BY		
Case Page Layouts	AnyDesk Case 2								
Case Close Page Layouts	Record Page	Desktop							
Lightning Record Pages									
Buttons, Links, and Actions									
Compact Layouts									

- 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.

۹	Search	* 🖬 🚓 ? 🌣 🐥 🐻
•••• Service Home Chatter O	Groups \checkmark Files \checkmark Accounts \checkmark Contacts \checkmark	Cases ∨ Reports ∨ *More ▼ 0
Case	+ Follow	Edit Delete Change Owner 💌
Priority Status Mittel In Warteschleife	Case Number	
Feed Related AnyDesk		Details
AnyDesk		\checkmark Case Information
Coording Destruct Marrie	Start Session Schedule Session	Case Owner
Session Request Ivaine	Session Request in	Case Number
User Link	Supporter Link	Contact Name

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.

•	Q Search	** 🖬 🚓 ? 🌣 🐥 🐻
Service Home Chatter Groups V Fi	es 🗸 Accounts 🗸 Contacts 🗸 Cases 🗸 Reports	✓ Dashboards ✓ * AnyDesk Setup ✓ X
Case Windows update		+ Follow Edit Delete Change Owner V
Priority Status Case Number Mittel Neu		
Feed Related AnyDesk		Details
AnyDesk	6 Start Session Schedule Session	✓ Case Information
Session Request Name	will receive notifications.	Case Owner
AnyDesk	all and the second s	Case Number
User Link	Supporter Link 4	Contact Name
Description PIs contact me asap. There are some problems with my F	C after the last Windows update 5	Account Name
Session History (1)	Load Sessions	Туре
Session Na V Session ID V Started	✓ Ended ✓ Source Add ✓ Destination ✓	Case Reason
B 0000 1100/100000. 01100.000.0	11 Yes 2000, 1. 4080 70008 1988 74887	Status

Step 3. Share the User Link

You can share the link to the remote session with the end user by clicking $\boxed{}$ 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.

٠	Q Search	*• 🗄 🚓 ? 🌣 🐥 🐻
Service Home Chatter Groups	Files V Accounts V Contacts V Cases V Reports	s \lor Dashboards \lor * AnyDesk Setup \lor \times 0
Case Windows update	es maa ("xxxxxoonnaa") oo	+ Follow Edit Delete Change Owner V
Priority Status Case Number Mittel Neu		
Feed Related AnyDesk		Details
♦>AnyDesk	Start Session Schedule Session Automatic emails for AnyDesk sessions are enabled, and us will receive notifications.	Case Information
Session Request Name AnyDesk User Link	Session Request ID Supporter Link	Case Number Contact Name



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.

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Service	Home	Chatter Grou	ups 🗸	Files 🗸 🖌	ccounts	✓ Contacts	✓ Cases ∨	Reports 🗸	Dashboards \lor * AnyDesk Setup \lor \times	0
Case Windows	update	- JENS-71(- 72		C NYSKA DUUGC	7838-7			ENS-110-7717	+ Follow Edit Delete Change Owner	-
Priority Stat Mittel Neu	tus U	Case Number								
Feed Rela	ated	AnyDesk							Details	
♦ >AnyD)esk			Automa	tic emails f	Start Session	Schedule Sess	ion 💌	\lor Case Information	
Session Request Nam	ne			will rece Sessi	ive notifica	ations. ID			Case Owner	£`
User Link		100		Supp	orter Link	Aug			Contact Name	
Description Pls contact me asa	p. There ar	e some proble	ms with m	y PC after the	last Wind	lows update			Account Name	

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**.

	Update Session Date
Start Date	
Date	Time
	<u>۵</u>
	Cancel Undate Session Date



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

Service Home	Chatter Groups	- Files - Accounts - Contacts - Cases - Reports - Dashboards -	* More
			CHIESING COMMUN
Case		+ Follow Edit Delete	Change Owner
Keyboard Issue			
riority Status	Case Number		
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Feed Related	AnyDesk	Details	
AnyDesk	C	Start Session Schedule Session 💌 🗸 Case Information	
AnyDesk	C C	Start Session Schedule Session V Case Information	
	(Start Session Schedule Session Case Information Session Request ID Case Owner	
AnyDesk	۲.	Start Session Schedule Session Case Information Session Request ID Case Owner Operatoritie Case Information	£
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🛠 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.

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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.

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🛠 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.

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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**.

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🛠 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 III 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 iii and navigate to AnyDesk Request.
- 2 View the list of created AnyDesk Session Requests.

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

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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 <u>Help Center</u> for common issues and FAQs.
- **3** Verify System Status visit the <u>AnyDesk Status</u> page to confirm there are no ongoing service disruptions.
- 4 **Contact Support** if the issue persist, submit a ticket via the <u>Help & Contact</u> section in <u>my.anydesk II</u> management portal or reach out to <u>AnyDesk Support</u>.



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

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