



Salesforce // Touch & Sell

v.06-03-23-en



With an existing account



Partages de documents (6+)			
Nom	Contact	Date d'envoi	Nom du propriétaire
DocSha-00002116	[Redacted]	22/03/2022 16:36	Fautrel ▼
DocSha-00002022	[Redacted]	22/02/2022 09:53	Allyn ▼
DocSha-00002014	[Redacted]	21/02/2022 15:08	Allyn ▼
DocSha-00002006	[Redacted]	18/02/2022 14:57	Allvn ▼

When sharing a content from T&S, if the email used exists in Salesforce, the link can be done with the corresponding contact in the Salesforce account.

You will have one line per sharing with the date, contact you shared with and your user (« owner »). Each line is clickable and link to the sharing details.

If several users share contents from T&S, these sharing will be added up to the list, in the same Salesforce account.

Data is synchronised once a day, only from T&S to Salesforce.

Documents sharing details



All details of contents sharing are available: Email object, content, link to the sharing page T&S, date, user, etc.

Contents sharing may be link to an opportunity in Salesforce.

The example on your right shows you the contents sharing details you will have in Salesforce.

Partage de document
DocSha-00002116

Nouvelle piste Modifier Supprimer

Contact Email	arnaud.schneider@knauf.com	Propriétaire	Valentin Fautrel
Objet	Touch & Sell - Suite à notre échange	Sender Email	valentin.fautrel@touch-sell.com
Contenu	Bonjour, Veuillez trouver ci-dessous le lien permettant d'accéder à votre espace de suivi de rendez-vous, et ainsi télécharger les documents qui vous ont été présentés.	Signature	En vous souhaitant bonne réception. Excellente journée, Valentin Fautrel Touch & Sell valentin.fautrel@touch-sell.com
Date d'envoi	22/03/2022 16:36		
Lien vers l'espace client T&S	https://bo.touch-sell.net/3887/meetings_follow_ups/50eb16e-95...f7004		

▼ Salesforce associations

Compte		Piste	
Contact		Opportunité	

▼ Informations système

Nom	DocSha-00002116	Date de création	22/03/2022 17:36
Créé par	Vincent Robert, 22/03/2022 19:34		
Dernière modification par	Vincent Robert, 22/07/2022 19:32		

Documents partagés (2)

- One Pager_Services
Date de création: 22/03/2022 19:34
- Customer Experience
Date de création: 22/03/2022 19:34

Afficher tout



Documents sharing details

A link to the contents sharing is available on Salesforce.

Downloaded contents are marked with the date of consultation.

As a reminder, a download is registered once a recipient click on the content shared from the sharing page.

The screenshot shows a document sharing interface with two main sections: 'Détails' and 'Téléchargements (2)'. The 'Détails' section contains a table of document information, and the 'Téléchargements' section shows a list of download dates.

Détails	
Nom du document	Guide-Utilisateur-v8.0.3
Partage de documents	DocSha-00002672
Lien	https://usercontent.touch-sell.net/medias/622557/download/media_content_NbbZzi3gVw5CuqZUwwPMwUAW.pdf
Miniature	https://usercontent.touch-sell.net/medias/622557/thumb/media_thumb_TH6XH2YjcVUND4iRfTaHcEqM.png
Créé par	Vincent Robert, 23/09/2022 13:32
URL	/api/v1/medias/622557
Description	
Tags	
Version	2
Taille	2 660 943
Type	pdf
Dernière modification par	Vincent Robert, 24/09/2022 13:32

Téléchargements (2)	
23/09/2022	
23/09/2022	
Afficher tout	

Create opportunity, if the contact doesn't exist



If your client email is unknown in Salesforce, a new opportunity will be automatically created.

The record of the documents sharing is on the right of the screen and the details are accessible when you click on the title.

A screenshot of a Salesforce lead record for 'Test Lead'. The header shows the lead name and a star icon. Below the header, there are fields for 'Société' (Test pour Floriane), 'Téléphone (2)', 'Adresse e-mail' (floriane+test@touch-sell.com), 'Propriétaire de la piste' (Racha Bourkadi), and 'Source'. A navigation bar below the header shows stages: 'Nouveau' (selected), 'En cours', 'Sans potentiel', 'A nurturer', and 'Converti'. On the right of the navigation bar is a button 'Marquer Statut comme terminé(e)'. The main content area is split into two sections: 'Activité' on the left and 'Partages de documents (1)' on the right. The 'Activité' section has a sub-section 'Consigner un appel' with a text input field and an 'Ajouter' button. Below it are filters and a list of activities (currently empty). The 'Partages de documents (1)' section shows a document titled 'DocSha-00002160' with a link to 'Afficher tout'. Below that is a section for 'Fichiers (0)' with a 'Charger des fichiers' button and a note 'ou déposer des fichiers'.



In a dedicated list

All shared contents can be listed and filtered.

Here is an example of a filtered list.

On this list, you can have the following information: date, name of the account, contact, user...

The link, on the name of the sharing, brings you to the details information.

The screenshot shows a CRM interface with a navigation menu at the top: Ventes, Accueil, Opportunités, Pistes, Tâches, Comptes, Contacts, Requêtes, Tableaux de bord, Rapports, and Partages de documents. The main area displays a list of document shares under the heading 'Partages de documents'. The list has 6 items, sorted by 'Compte'. A filter panel on the right is open, showing 'Filtrer par propriétaire' set to 'Tous les partages de documents' and 'Correspondance avec tous ces filtres'. A search filter is applied: 'Compte contient'. The table columns are: Date de création, Nom, Pi..., Compte, Contact, O..., Date d'envoi, and Nom d... The data rows are as follows:

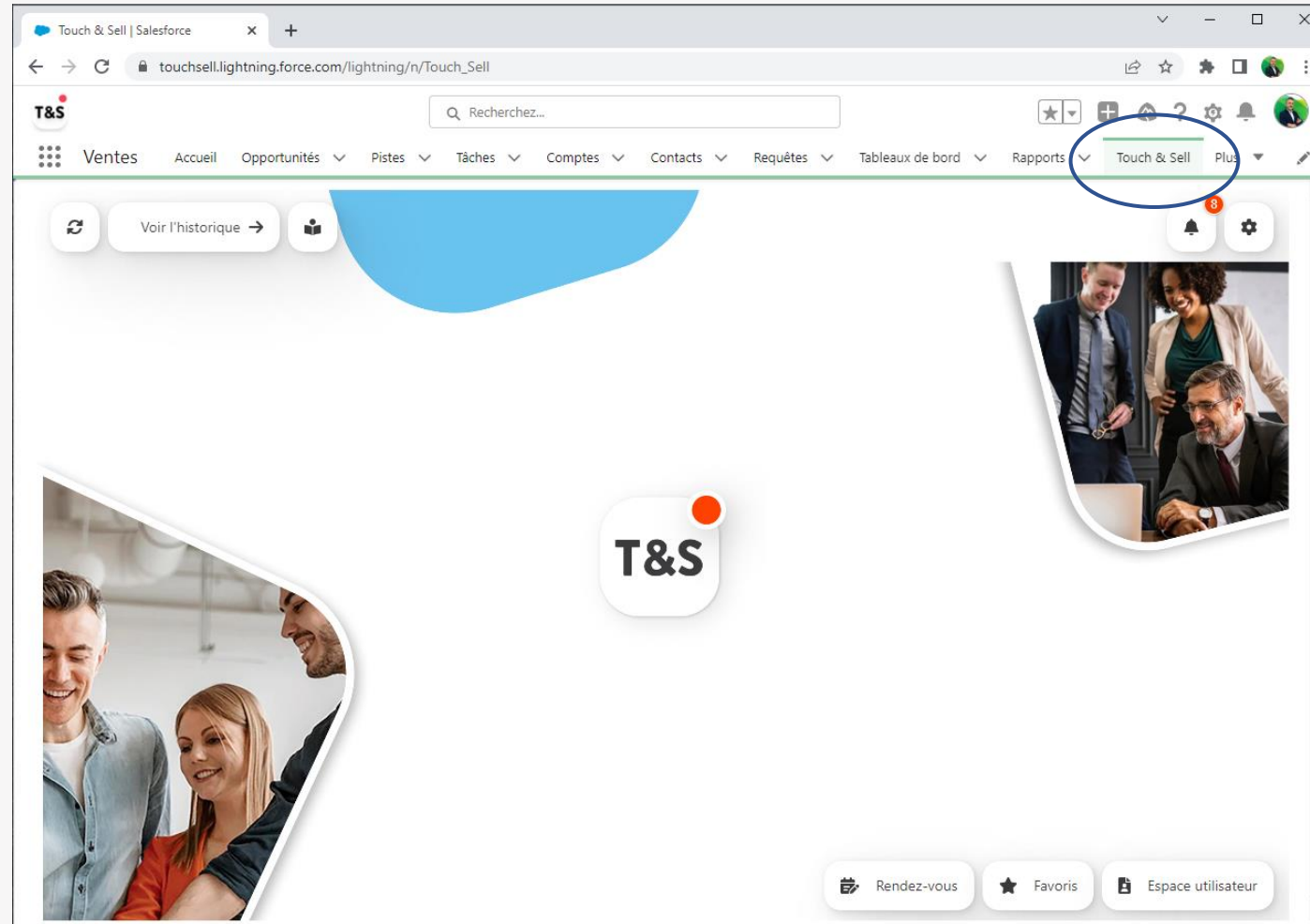
	<input type="checkbox"/>	Date de créati...	Nom	Pi...	Compte ↑	Contact	O...	Date d'envoi	Nom d...
1	<input type="checkbox"/>	18/12/2019 11:...	Cart-00000314					17/12/2019 13:...	Robert
2	<input type="checkbox"/>	04/03/2020 16:...	Cart-00000457					03/03/2020 16:...	Robert
3	<input type="checkbox"/>	08/12/2020 14:...	Cart-00000791					01/12/2020 11:...	Robert
4	<input type="checkbox"/>	04/05/2022 19:...	DocSha-00002...					04/05/2022 14:...	Robert
5	<input type="checkbox"/>	04/05/2022 19:...	DocSha-00002...					04/05/2022 14:...	Robert
6	<input type="checkbox"/>	27/10/2022 13:...	DocSha-00002...					26/10/2022 16:...	Thevenet

Access T&S directly from a Salesforce button

T&S

On Salesforce, you can easily add a button to connect your web app T&S, same as the mobile app.

This eases the access to your contents and meeting preparation.



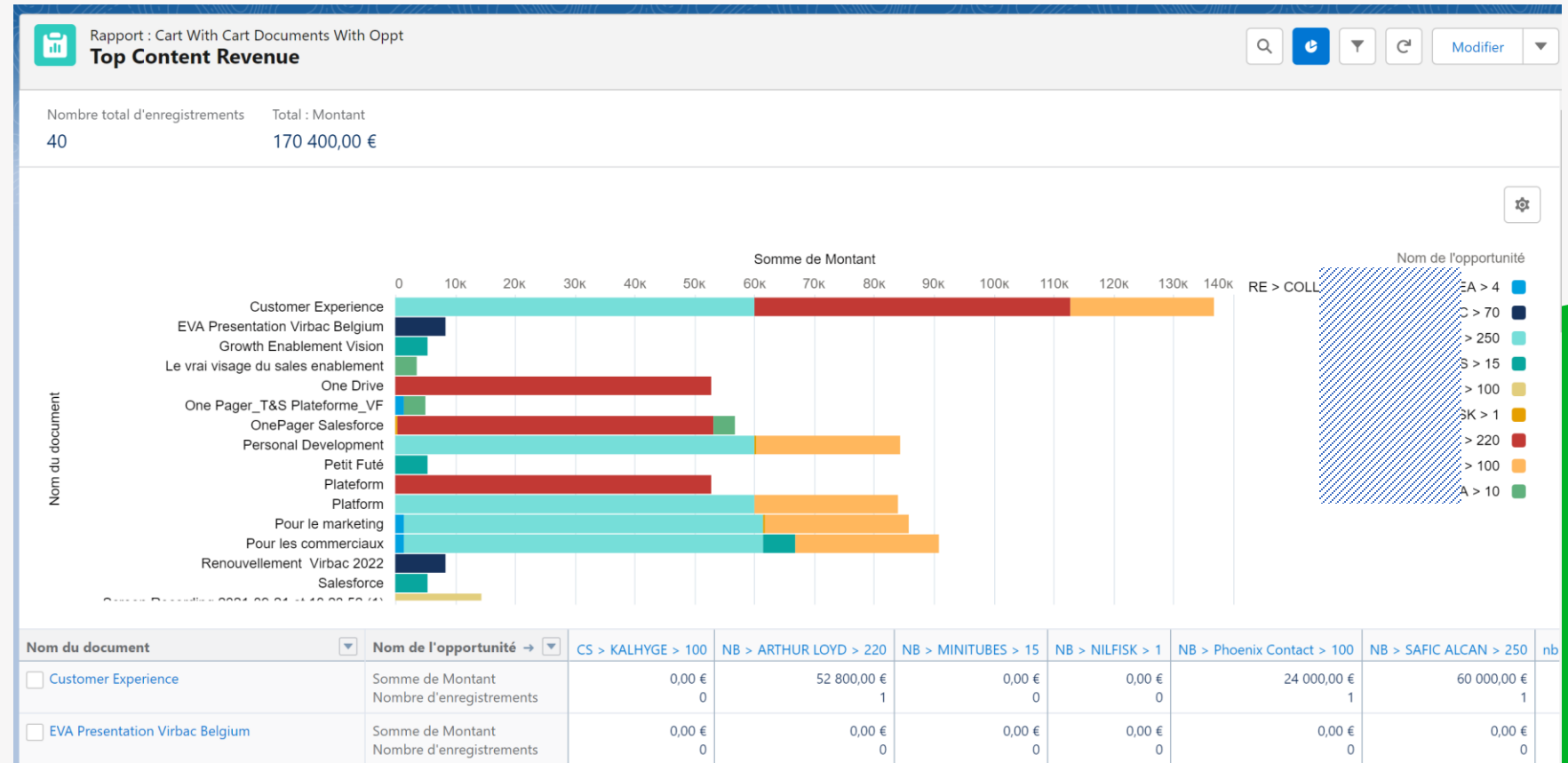
Reports



You can set up various reports on Salesforce to analyse data (shared documents, downloads,...)

Here is an example of contents linked to opportunities with the amount of the opportunity.

For instance, the document « Customer Experience » was used on 3 opportunities for about €140k in total.



Explanation with a video

T&S

The screenshot displays a CRM interface with a shopping cart and a client profile. The shopping cart, titled 'Panier Cart-00001596', contains a document titled 'Documentation à propos de nos connecteurs'. The client profile, titled 'Client test', shows contact information and a list of documents associated with the cart.

Panier Cart-00001596

Nom du panier	Cart-00001596
Objet	Documentation à propos de nos connecteurs
Contenu	Bonjour, Comme discuté ce jour, veuillez trouver ci-joint notre documentation à propos de nos connecteurs : - Salesforce - Sharepoint Je me tiens à disposition pour rediscuter avec vous des cas d'usages associés.
Signature	Merci, Floriane Garde
Date de création	27/08/2021 17:44
Date d'envoi	27/08/2021 15:44
Lien vers l'espace client T&S	https://bo.touch-sell.net/2472/meetings_follow_ups/e098fe16-a302-4ec3-881b-73276b4b7d95

Client test

Société	floriane+client2708@touch...	Téléphone	
Téléphone mobile		Adresse e-mail	floriane+client2708@touch...
Propriétaire de la piste	Floriane Garde	Source	

Documents du Panier (2)

- Connecteur Sharepoint
Date de création: 30/08/2021 17:16
- Connecteur CRM
Date de création: 30/08/2021 17:16

Afficher tout