



Solution Brief

How to Monitor ALL of Salesforce to Maximize
Workforce Productivity

Monitoring Salesforce Performance and Diagnosing Problems from an End-User Perspective

Salesforce customer relationship management (CRM) performance is critical to sales, marketing, and customer service for smooth business operations. As a result, Information Technology (IT) teams and developers often customize the cloud platform using thousands of apps, plugins, and APIs available in the Salesforce AppExchange Store to boost collaboration and improve efficiency.

The recent push to adopt Salesforce Lightning – a better modern component-based framework - was a big step towards improving the digital experience and operations of Salesforce now that it's grown to be the central hub of many businesses.



However, each upgrade and integration point introduces latency, affects the experience, and possibly reduces page load time and usability. As more content renders on the client side with Lightning, operation teams must account for additional dependencies in the end-to-end network to identify the root cause and diagnose problems quickly.

In an era where remote workers are geographically distributed, different home locations and net-

work conditions impact the Salesforce web performance. If Salesforce is slow, it can ruin employee productivity and threatens data integrity when your sales team is trying to update or obtain records to support customers or the business. What follows are missed business opportunities and lost revenue for the company. To deal with these sluggish problems, your team needs to continually optimize networks and ensure a high-quality SaaS experience from anywhere.

Using Exoprise CloudReady and Service Watch, network administrators can confidently measure Salesforce performance with proactive synthetics and complete real user monitoring (RUM) coverage. From establishing performance baselines to resolving remote worker problems, the Exoprise Better Together monitoring solution promotes maximum productivity, improves customer experience, and ensures successful business outcomes.

This solution brief is intended for Salesforce administrators, developers, solution architects, and IT departments that need to support a vast ecosystem within the Salesforce CRM platform. Whether new product releases or changes to the work environment IT leaders require a 360-degree view of Salesforce availability and performance from every vantage point.



Start With Deploying a Private Site or Use Exoprise Public Sites

A private site is an Exoprise service that runs inside your network behind a firewall and provides an inside -> outside look at your apps, networks, and services. By deploying CloudReady synthetic sensors to a private site, your team can synthetically emulate an end-user accessing Salesforce as frequently as once a minute to check the health of the end-to-end network, including LAN, WAN, Wi-Fi, MPLS, or SD-WAN.

Private sites are securely installable on any Windows machine or VM and have minimal overhead on a desktop or laptop. Your team should deploy private

sites at key locations throughout your environment where you have users relying on Salesforce. You can also deploy Salesforce monitoring to [Exoprise-controlled public sites](#).

Create an account with secure.exoprise.com, and from the machine, you want to set up as a monitoring agent, download the Exoprise Management Client. Once logged into the client with the same credentials, select 'Sites' from the left menu. Under Sites, select 'Deploy' and click 'Get started Installing a Private Site.'

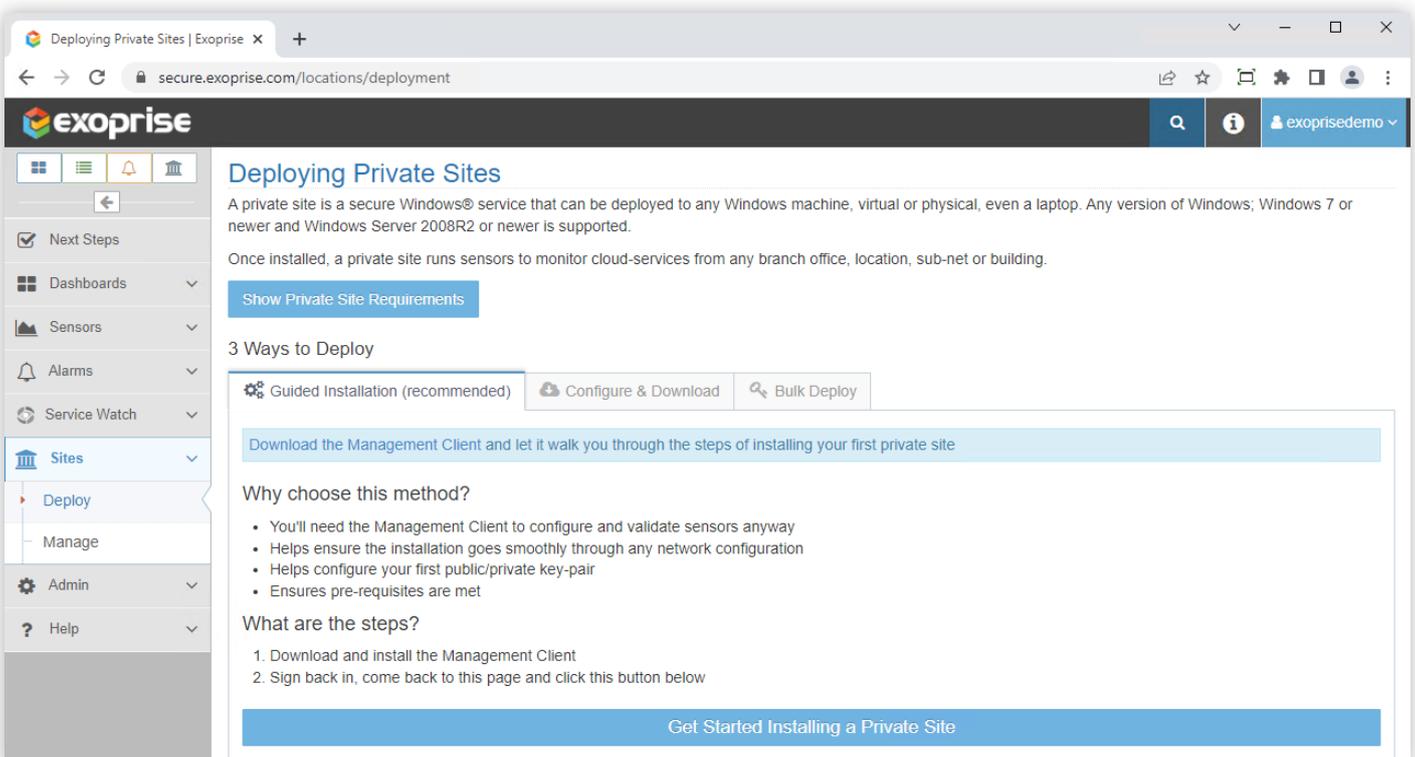


Figure 1 Deploy a Private Site

Once a site is ready, you can add a Salesforce synthetics sensor from any device.

Synthetic Monitoring

Add a Salesforce Sensor to Proactively Monitor the Availability and Network Path Performance of the CRM Service

The Exoprise web sensor monitors the health and availability of the Salesforce web service (classic or Lightning UI) from any location. Code-free Salesforce synthetics emulate a user automatically signing into the application (with Multi-Factor Authentication if turned on) and accessing the home page. Still, you can also configure a page that is deeper within Salesforce or one that is delivered via AppExchange.

If you have Single Sign-On enabled, the sensor will test across the server whether it's integration with

Microsoft Azure AD or Okta or a different SSO solution. Network administrators and Salesforce application owners will obtain complete network visibility into Salesforce.com page performance with just some of the below metrics:

- Login Time
- Authentication Time
- Page Layout Time
- Time to first byte
- Connect Time
- DNS lookup time and more

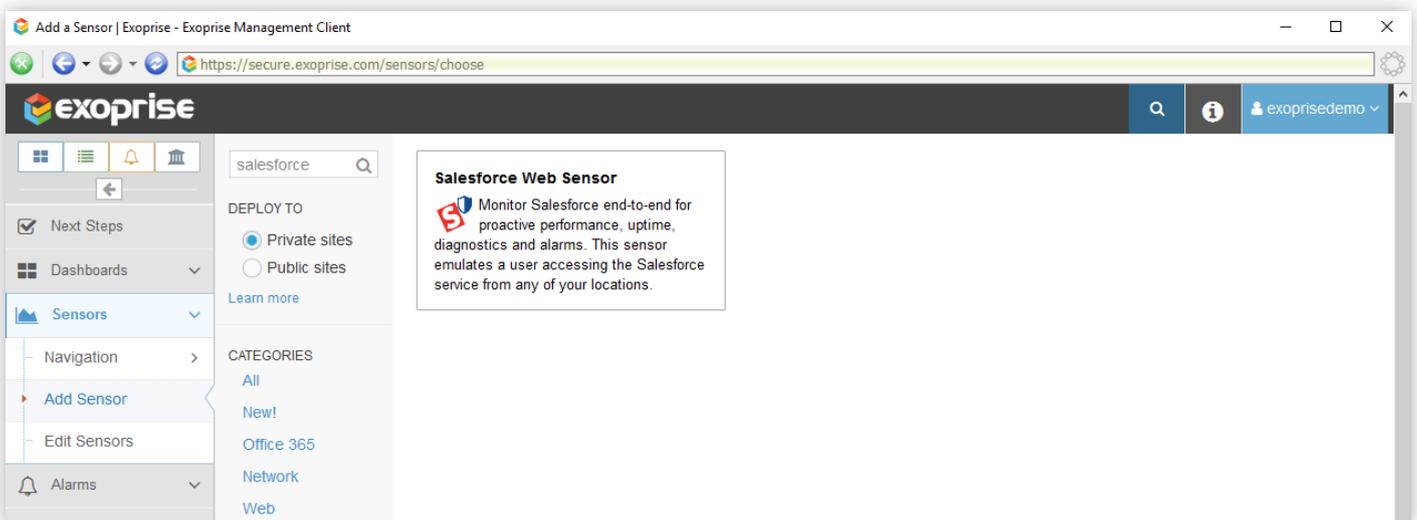


Figure 2 Select the Salesforce Web Sensor

Benchmarking and comparing Salesforce performance at your location against other Exoprise customers with crowdsourced analytics is available for every metric. Immediately identify network bottlenecks impacting user experience due to spotty ISP failure, unresolved DNS queries, application server overload, WAN routing problems, or possibly proxy server errors. In addition, the network path performance and hop-by-hop diagnostics offer detailed information about each node's packet loss and response time.

In the following wizard step, enter your username, password, and MFA key (optional) to access your Salesforce account. Exoprise already prepopulates the Destination URL address in this step, but, again, you can choose a different destination URL or ap-

plication within Salesforce for complete synthetic testing. The Salesforce sensor validates your login credentials with your SSO identity provider so that you can monitor the availability of the cloud service.

The screenshot displays the 'Salesforce Web Sensor Setup: Choose an URL' wizard in the Exoprise Management Client. The interface features a navigation sidebar on the left with options like 'Next Steps', 'Dashboards', 'Sensors', 'Alarms', and 'Service Watch'. The main content area shows a progress bar with six steps: 1. Introduction, 2. Prerequisites, 3. Choose an URL (current step), 4. Validation, 5. Alarm Setup, and 6. Deploy. Below the progress bar, a description states: 'Monitor Salesforce end-to-end for proactive performance, uptime, diagnostics and alarms. This sensor emulates a user accessing the Salesforce service from any of your locations.' The configuration form includes the following fields:

- Destination URL:**
- Subdomain:** (Note: for normal login enter "login", for a custom Salesforce sub-domain "your_sub_domain.my")
- Username:** (Note: Enter the email or username you use to log into your web server or service site.)
- Password:** (Note: Enter the password for the account)
- Confirm Password:** (Note: Confirm the password for the account)
- User Input Name:**

A note at the bottom of the form states: 'When encountering a split user/pass form, the sensor will try to identify the user input form, which could fail. In which case this lets you specify the name or id of the user input field to help identify such forms.'

Figure 3 Configure the Salesforce Sensor to Monitor CRM Performance

After the sensor has successfully validated the credentials, you will see a preview screenshot of what the sensor sees on the Salesforce home page. This acts as a confirmation of the web sensor setup—Right-click on the image to open it in a new window for a better view.

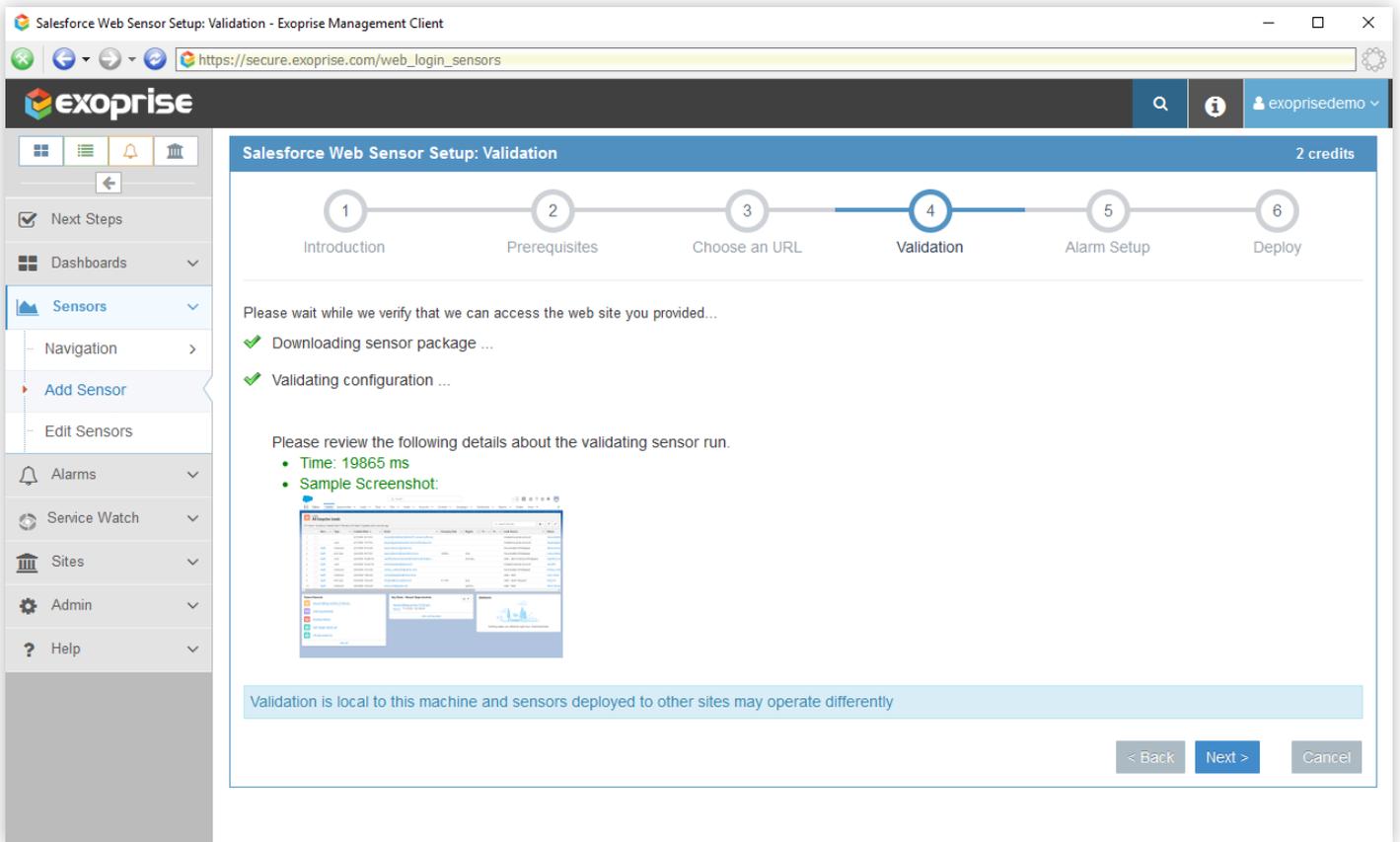


Figure 4 Validation Screenshot of the Salesforce Destination Page

The next step is to create new alarms to manage situations when Salesforce is down or suffering an outage. Choose to be notified about just all of the adverse conditions, only error conditions, or just performance problems.

Finally, deploy the new Salesforce sensor to the private site you created in the first step. That's all you need to configure your first Salesforce web sensor, start monitoring the end-to-end network performance, and obtain diagnostics of the CRM cloud service from any location. Then, click on the newly created sensor and view Salesforce connectivity data in a few minutes.



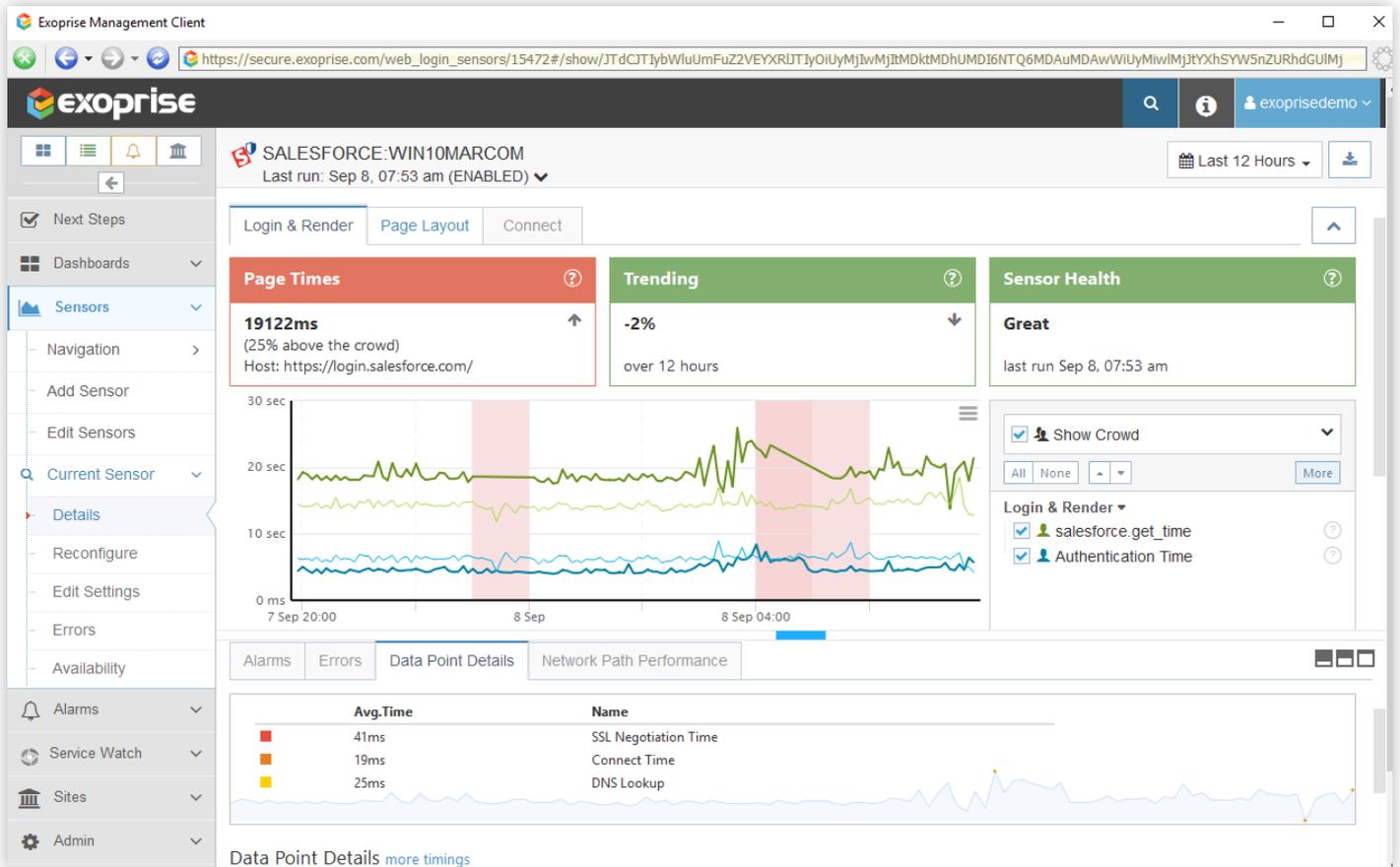


Figure 5 Salesforce Performance Monitoring in CloudReady

CloudReady synthetics proactively capture Salesforce performance metrics and alert IT administrators during any failure, outage detection, or service degradation (available under the Alarms and Error tab) **before they impact your end-users.**

Visualize the CRM cloud service health trends and obtain historical session data over different periods from any location where the sensor is deployed. At the same time, use the Data Point Details tab to quickly compare specific Salesforce performance metrics at your site with crowdsourced benchmarks.



Real User Monitoring

Salesforce Experience Observability for Employees Everywhere

Service Watch Browser

Deploy the browser RUM plugin on endpoint devices to track poor Salesforce web experience for end users. Diagnose slow SaaS providers, proxies, DNS, SSO, LAN/WAN, VPN, and Wi-Fi networks from home, office, or on the road and deliver a rich CRM digital experience for a work-from-anywhere audience.

You can securely install Service Watch Browser from the Microsoft Edge or Google Chrome web store. After installing the browser extension, network admins can configure several Salesforce domains and web URLs

that the sales team accesses regularly. When visiting these specific domains, Service Watch will collect session performance from the slowest web transactions and upload it to the Exoprise server for aggregation and comparison. Support teams can quickly pinpoint application and network connectivity problems and optimize the digital employee experience with Salesforce Lightning using this information.

Let's create a Service Watch Browser configuration in your Exoprise account and set up all the Salesforce domains that need close monitoring.

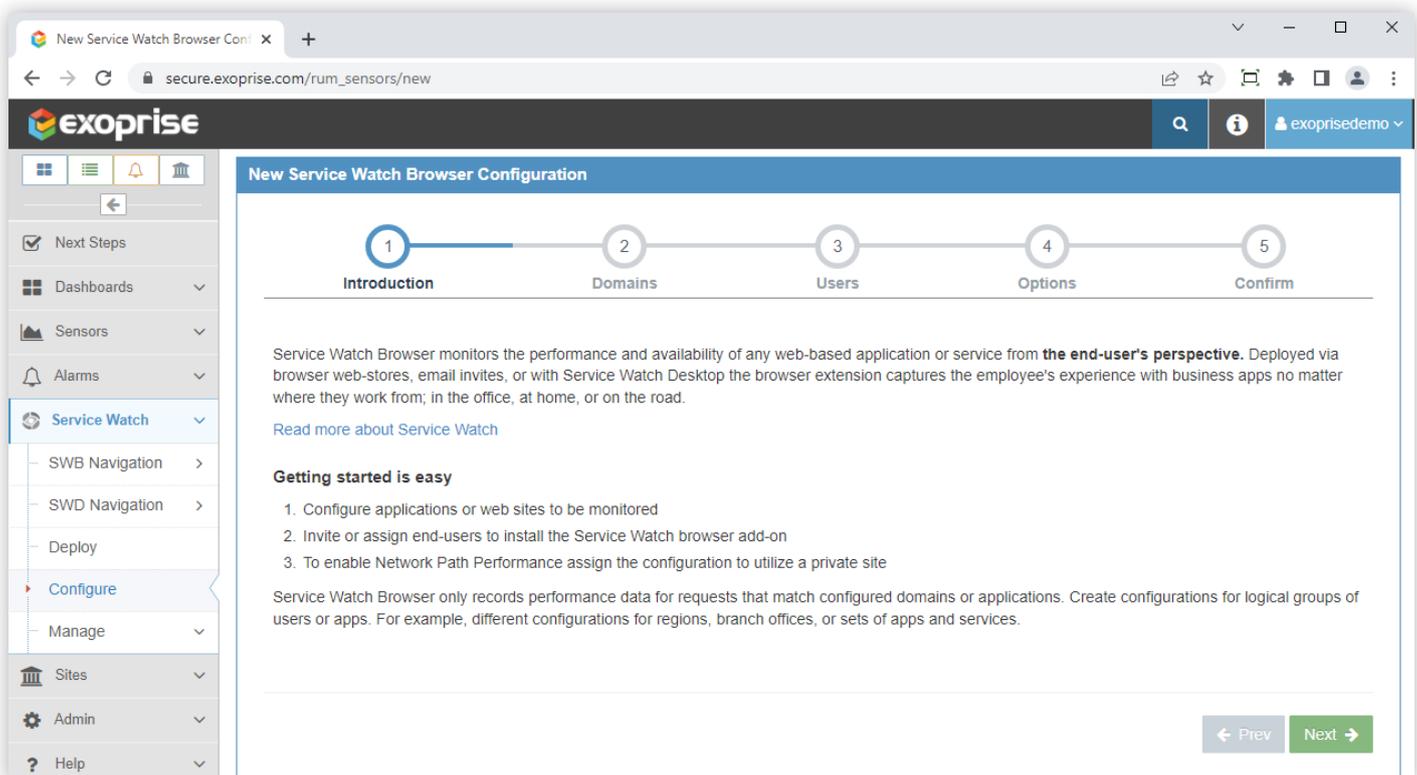


Figure 6 Service Watch Browser Configuration for Salesforce

In the below step, you can add as many as eight domain entries of Salesforce. Exoprise records performance data for matching domains only. Exoprise offers a standard Salesforce domain set for classic and Lightning versions, which can be selected from the dropdown. You can change the domains and links as necessary.

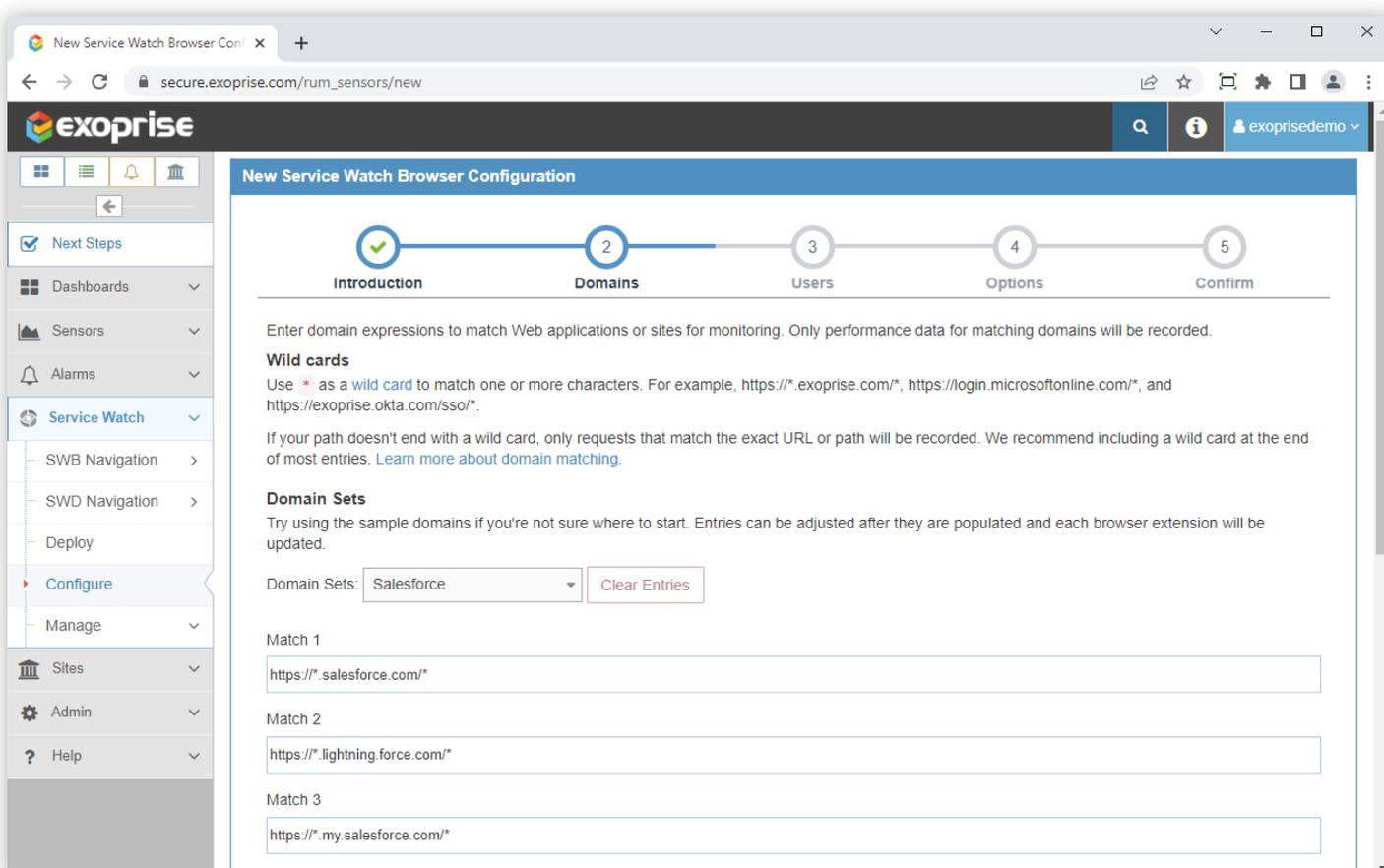


Figure 7 Add Salesforce Domains and Related URLs

Invite users from your organization to download the Service Watch configuration and install the browser monitoring agent. There are also other ways of installing the Service Watch Browser add-on. The add-on can be deployed via Service Watch Desktop. There is also a separate browser installation and downloadable executable. Please contact us at support@exoprise.com if you have any questions about how Service Watch can be installed. The more coverage, the better IT is equipped to solve user experience problems.

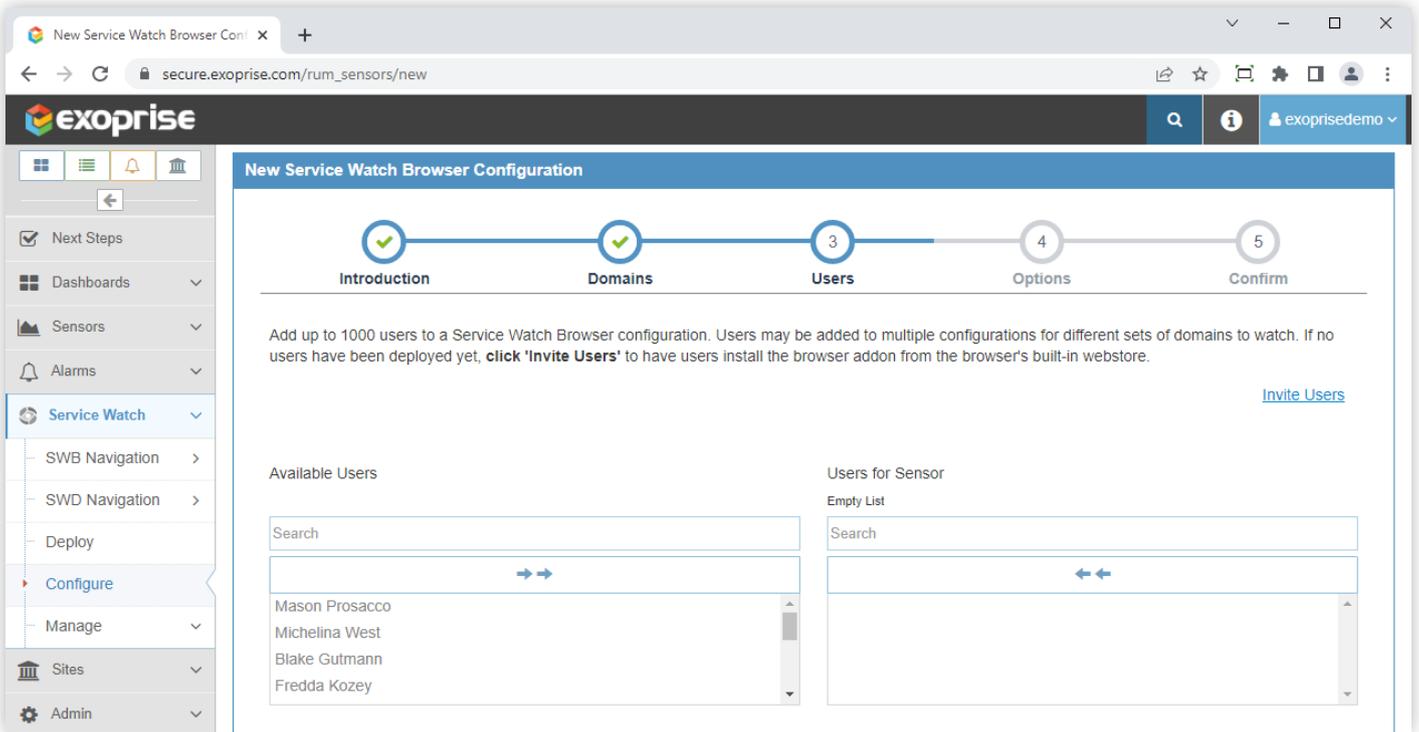


Figure 8 User Invitations During Service Watch Configuration

In the final step, choose private sites from where you need to collect traces for pinpointing slow network problems with Salesforce, AppExchange, Lightning and other dependent domains. Again, hop-by-hop network performance data for troubleshooting is available for any configured domains.

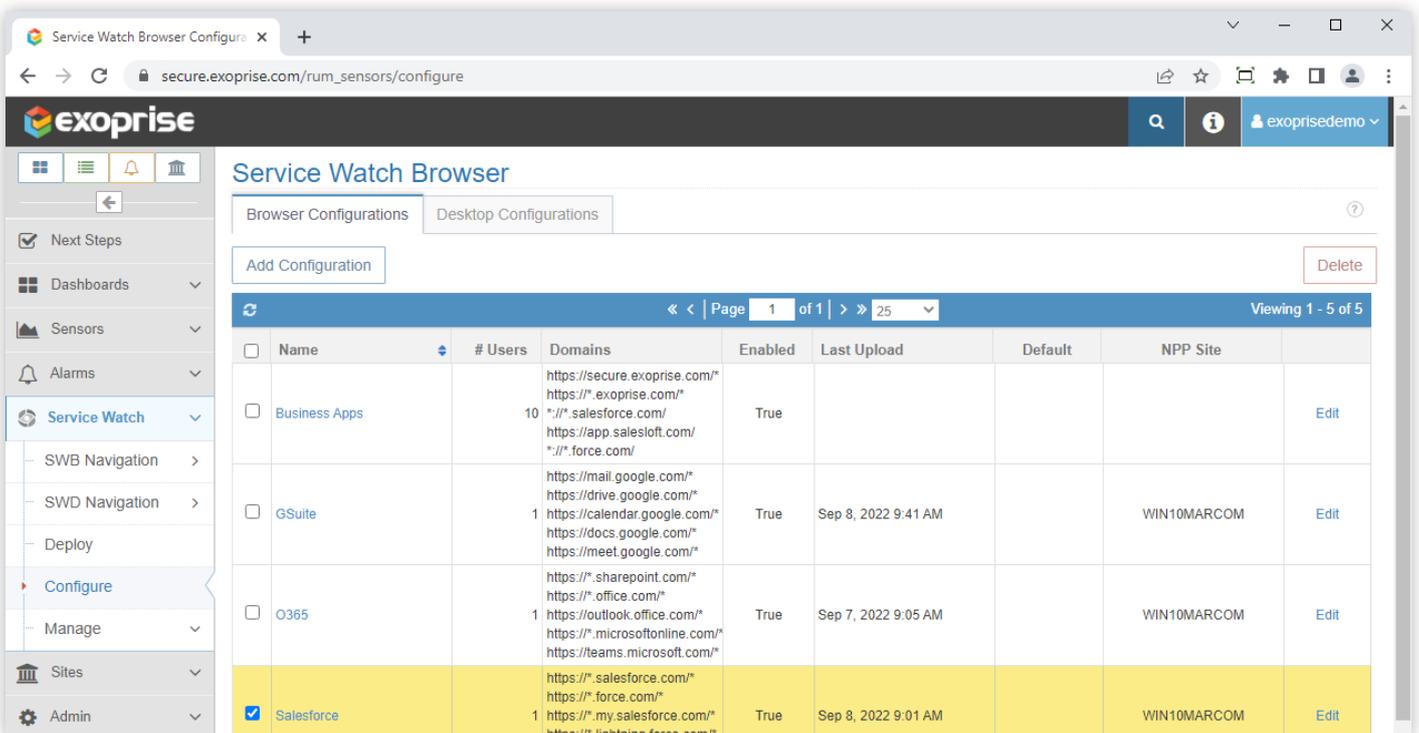


Figure 8 Salesforce Configuration in Service Watch Browser

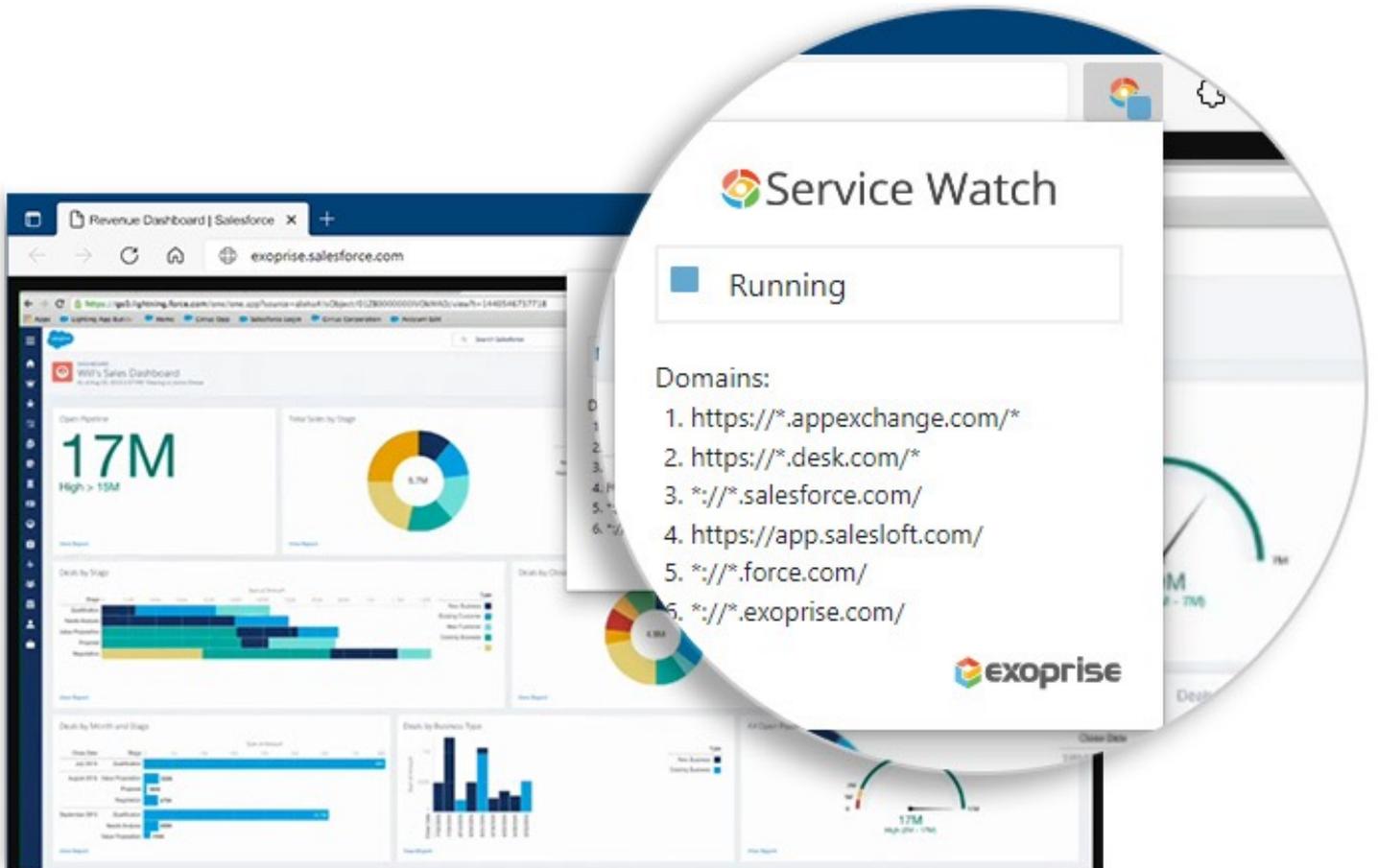


Figure 9 Salesforce RUM with Service Watch Browser

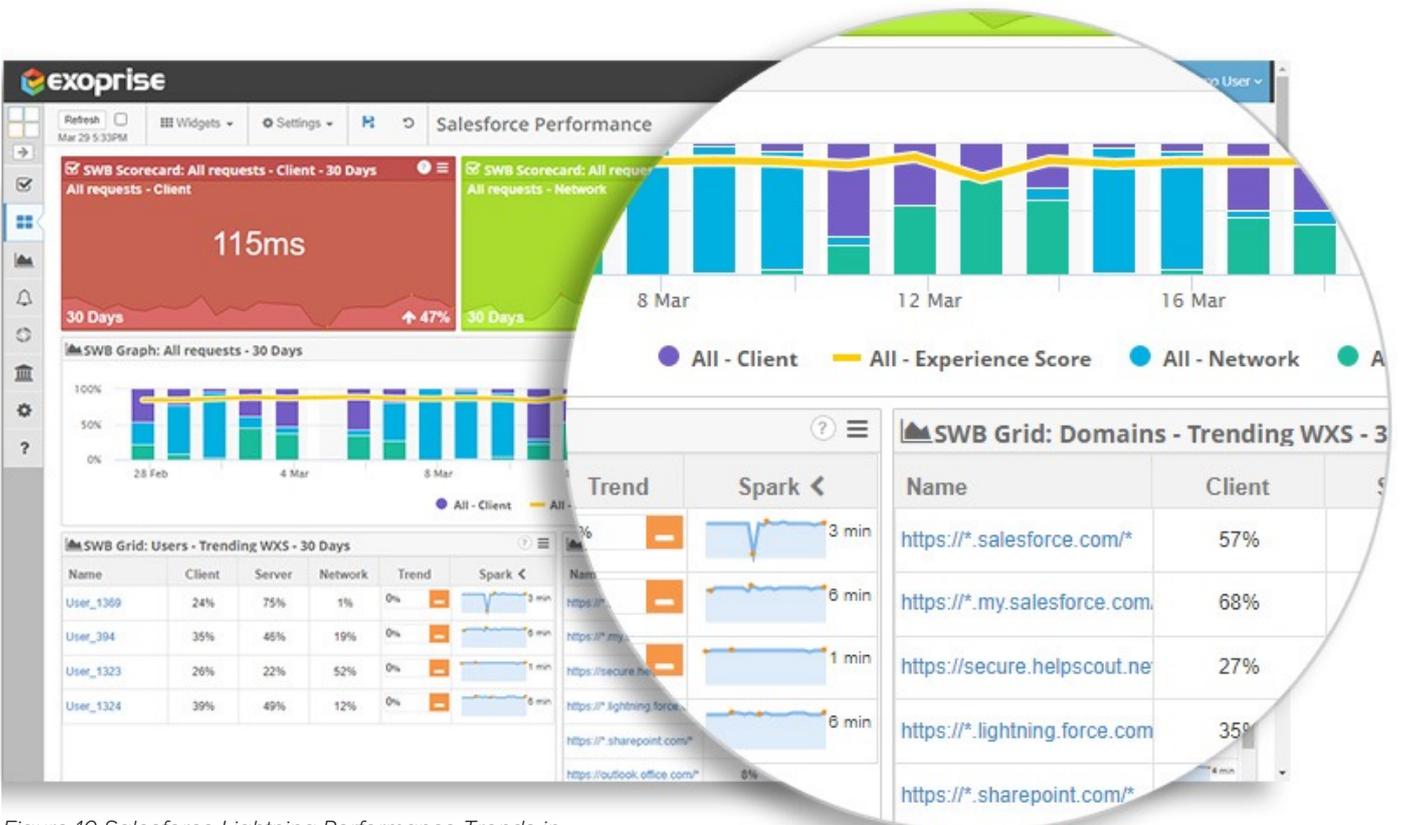


Figure 10 Salesforce Lightning Performance Trends in Service Watch Dashboard

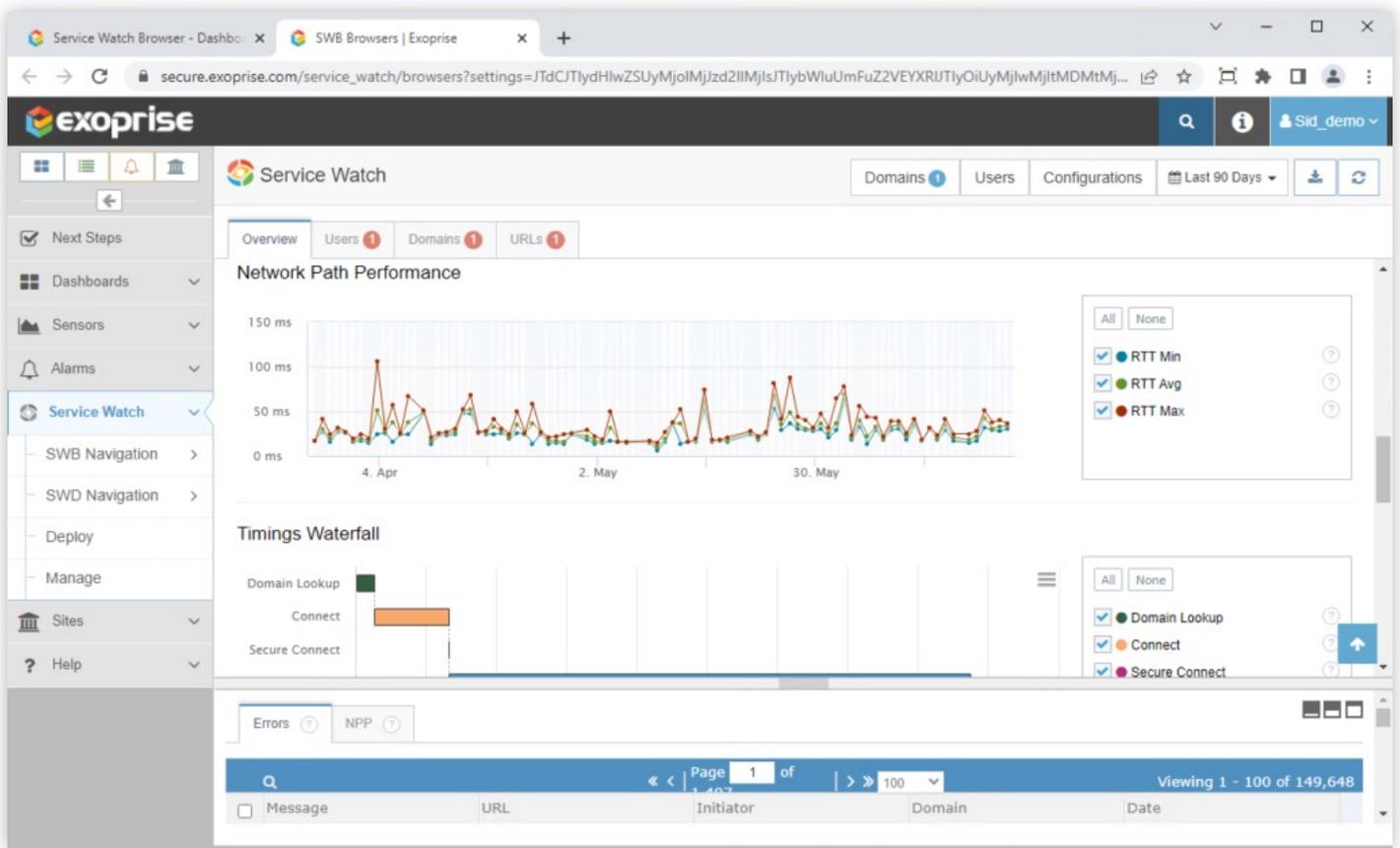


Figure 11 Network Path Performance and Waterfall Timings for the Salesforce Domain



Service Watch Desktop

Finally, there is endpoint monitoring from Service Watch Desktop that tracks the performance of Salesforce from browsers and for integrated services like those embedded within the Microsoft Outlook thick-client app or plugins for Outlook Web Access, Microsoft's web client (OWA). Sales reps often download the Lightning for Outlook add-in from the Microsoft AppSource that automatically syncs contacts/calendar events from their email to Salesforce. As a result, productivity is high, and sales teams can spend more time selling rather than duplicating their record updating efforts through multiple interfaces.

Persistent usage of Microsoft Outlook and the Salesforce add-in, as an example, presents IT teams with several support challenges. End-users often report issues such as slowness, disconnection, data lag, sync, or errors with the Salesforce Outlook integration app. As a vast platform, Salesforce allows endless customization/API integration, which can drain system resources and affects the performance of applications it integrates with like Outlook for example.

Service Watch Desktop captures thousands of endpoint system resource metrics to assess the overall system experience score and productivity impact of apps running on a user machine. In addition, the product collects OS reliability data to measure the commonality of Outlook crashes and slow downs.



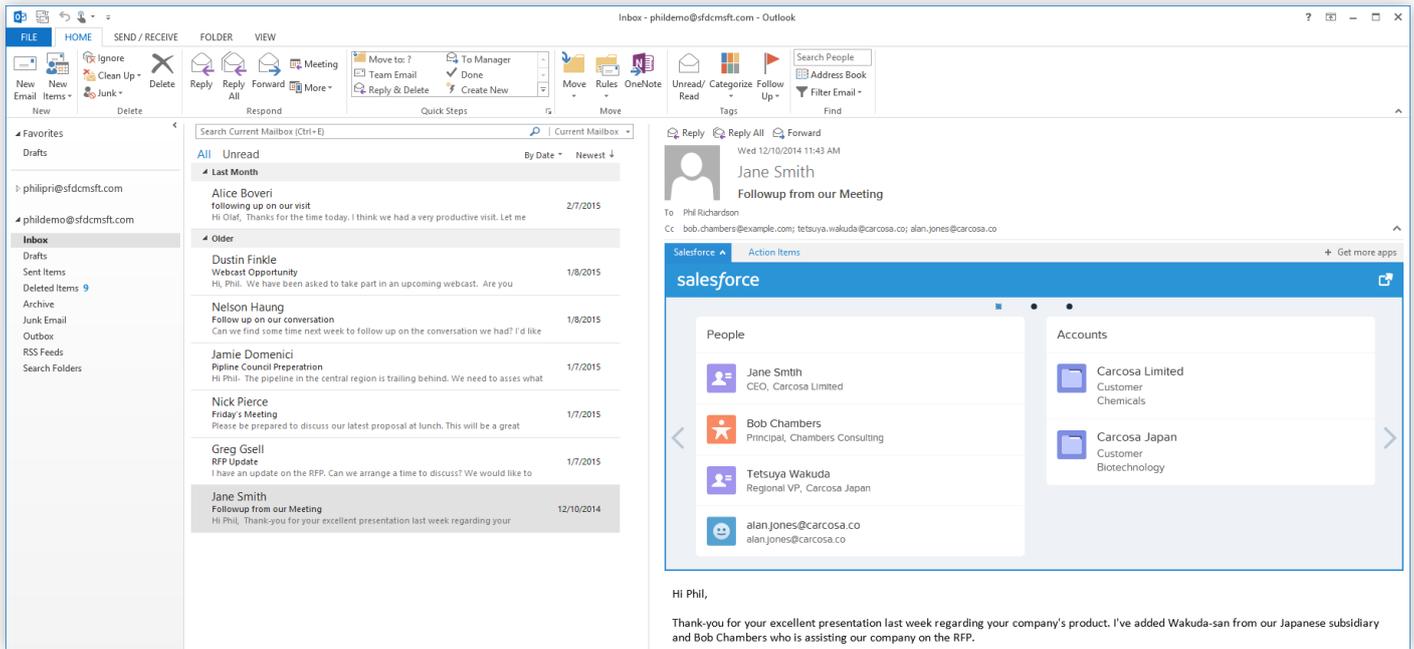


Figure 12 Salesforce and Outlook Desktop App Integration Example

To get started deploying Service Watch Desktop, create a [Service Watch Desktop configuration](#) in your Exoprise account similar to how you did for Service Watch Browser. In fact, Service Watch Browser is deployed and included alongside Service Watch Desktop, so create a Salesforce oriented configuration first.

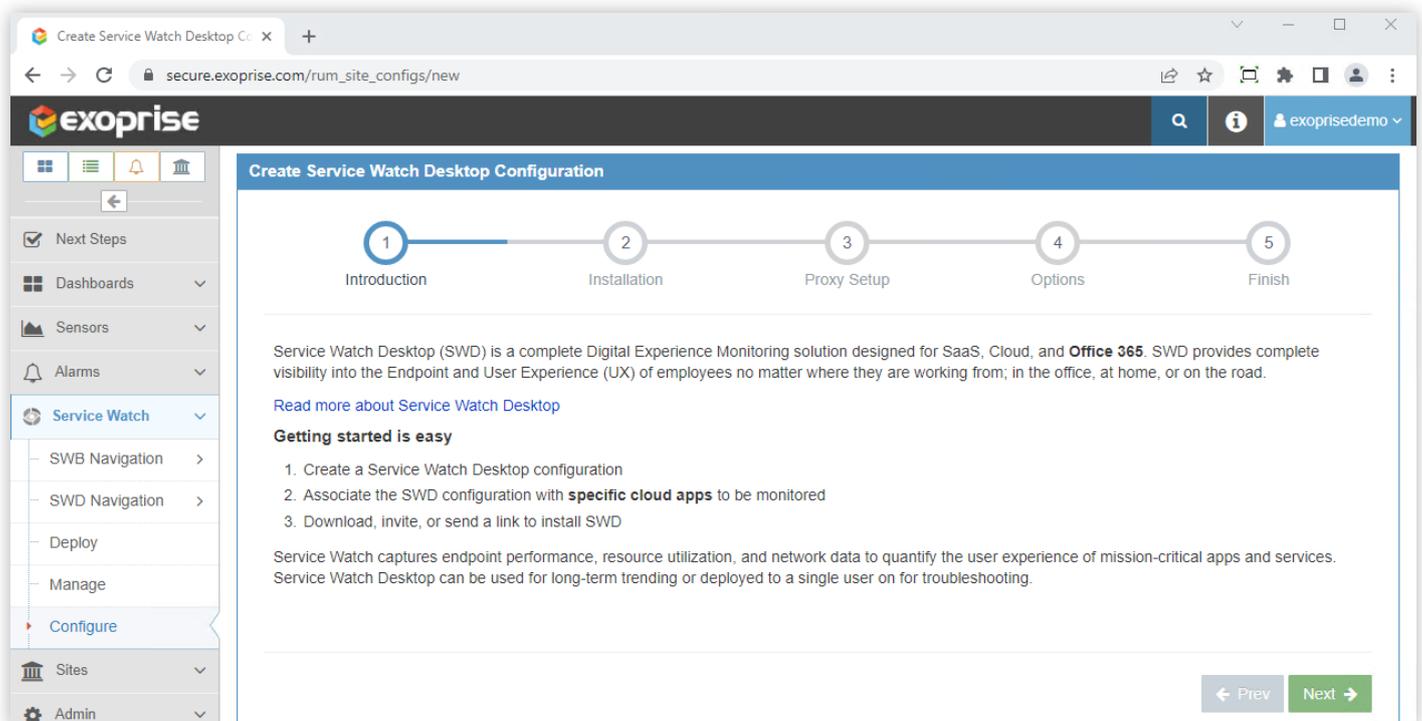
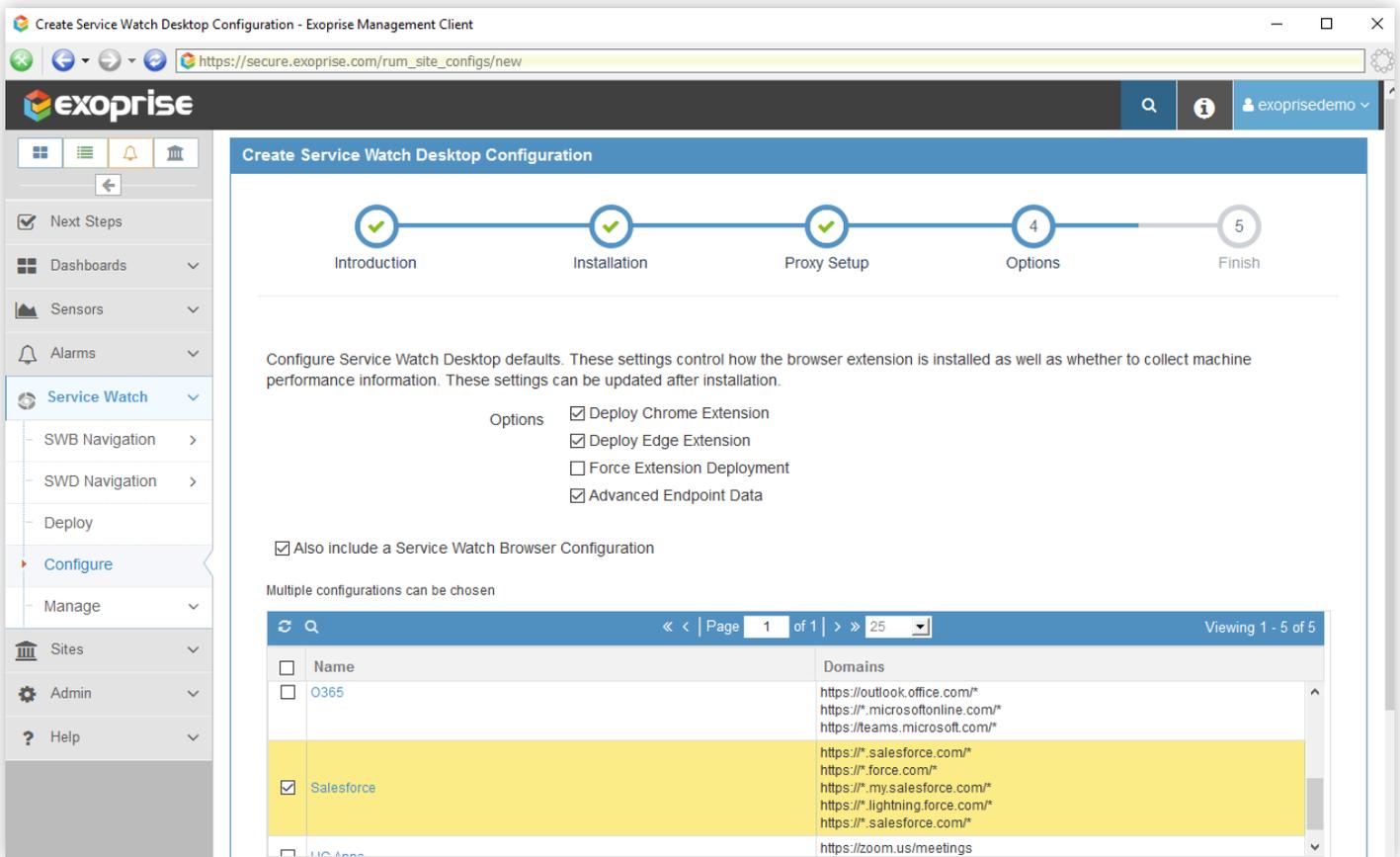


Figure 13 Service Watch Desktop Configuration for Monitoring Outlook Thick-Client Performance

Select the Salesforce Service Watch Browser configuration you created, then click Next.



Create Service Watch Desktop Configuration - Exoprise Management Client

https://secure.exoprise.com/rum_site_configs/new

exoprise

Search | Information | exoprisedemo

Service Watch

Next Steps

Dashboards

Sensors

Alarms

Service Watch

SWB Navigation

SWD Navigation

Deploy

Configure

Manage

Sites

Admin

Help

Create Service Watch Desktop Configuration

Introduction Installation Proxy Setup Options Finish

Configure Service Watch Desktop defaults. These settings control how the browser extension is installed as well as whether to collect machine performance information. These settings can be updated after installation.

Options

- Deploy Chrome Extension
- Deploy Edge Extension
- Force Extension Deployment
- Advanced Endpoint Data

Also include a Service Watch Browser Configuration

Multiple configurations can be chosen

Viewing 1 - 5 of 5

Name	Domains
<input type="checkbox"/> O365	https://outlook.office.com/* https://*.microsoftonline.com/* https://teams.microsoft.com/*
<input checked="" type="checkbox"/> Salesforce	https://*.salesforce.com/* https://*.force.com/* https://*.my.salesforce.com/* https://*.lightning.force.com/* https://*.salesforce.com/*
<input type="checkbox"/> JG Apps	https://zoom.us/meetings

Figure 14 Select the Salesforce Configuration

After the Service Watch Desktop configuration is complete, send the package installation link to your sales team and multiple users so they can deploy it on their endpoint devices. The downloadable installation is tied to your Exoprise tenant and can be installed via Active Directory or packaged and deployed via installation tools like System Center Configuration Manager.

Once deployed, log into your Exoprise account to access the Service Watch Desktop dashboard, which depicts the overall experience score for everyone in your team. Finally, select a particular user to view their Outlook performance.



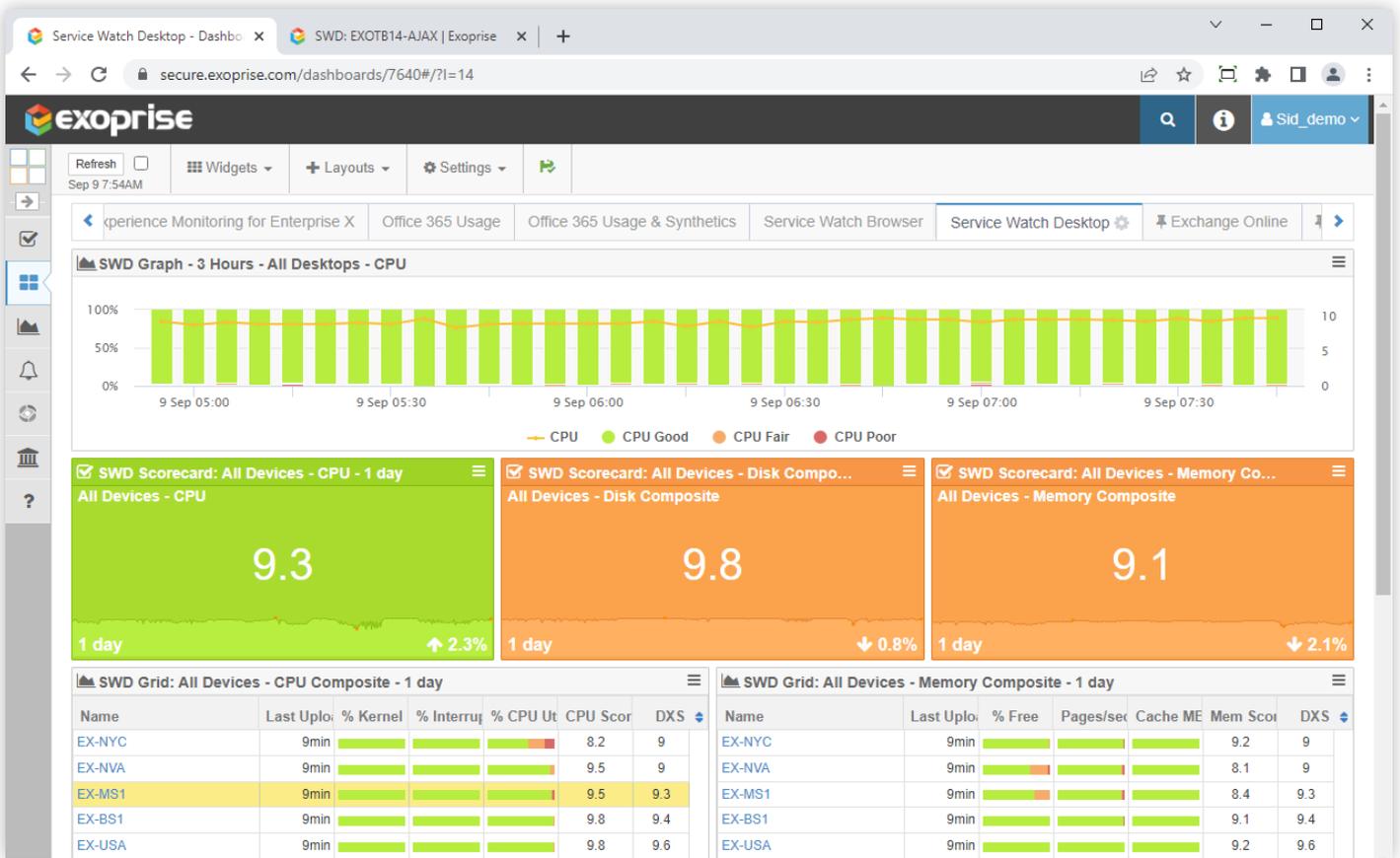
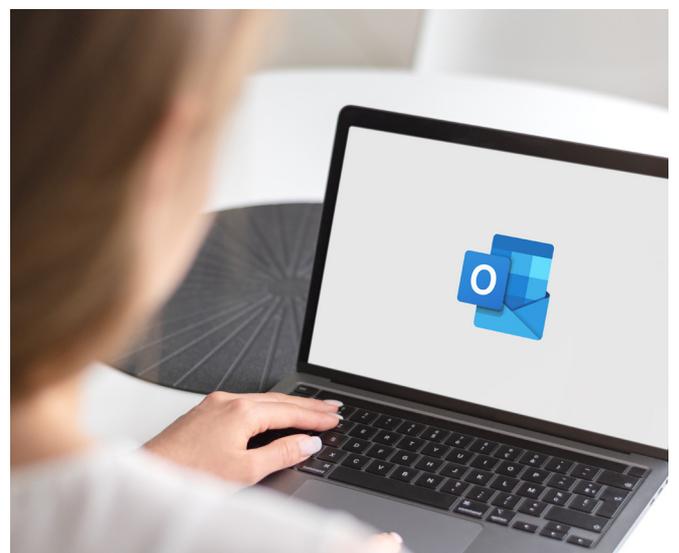


Figure 15 Service Watch Desktop Dashboard

Service Watch collects real-user monitoring network telemetry when Outlook is in use, recording latency as measured by the underlying operating system for every connection it maintains. Obtain network visibility from the email service app to LAN/WAN to the Internet to the service provider. Visualize TCP latency, response time, packet loss, etc., that are causing Outlook problems and compare it to the crowd baseline for faster troubleshooting.



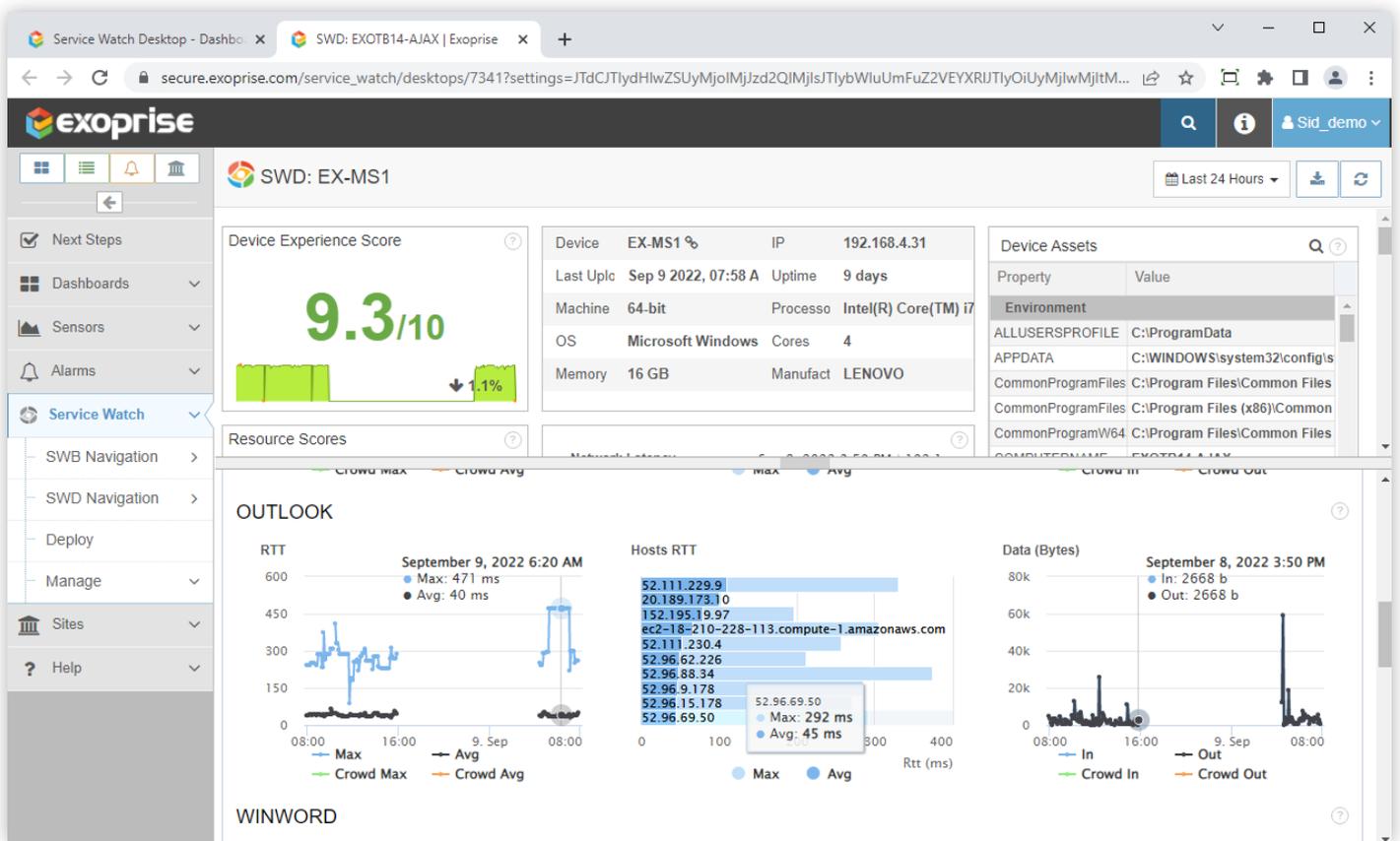


Figure 15 Outlook Desktop Client (with Salesforce Integration) Network Telemetry

In addition, monitor CPU usage for the Outlook app under the Core Apps tab of Service Watch Desktop. Consistently high numbers usually signal why end users are experiencing slowness with their apps. If Outlook crashes after installing the Salesforce add-in, check the reliability section to uncover system events behind it.

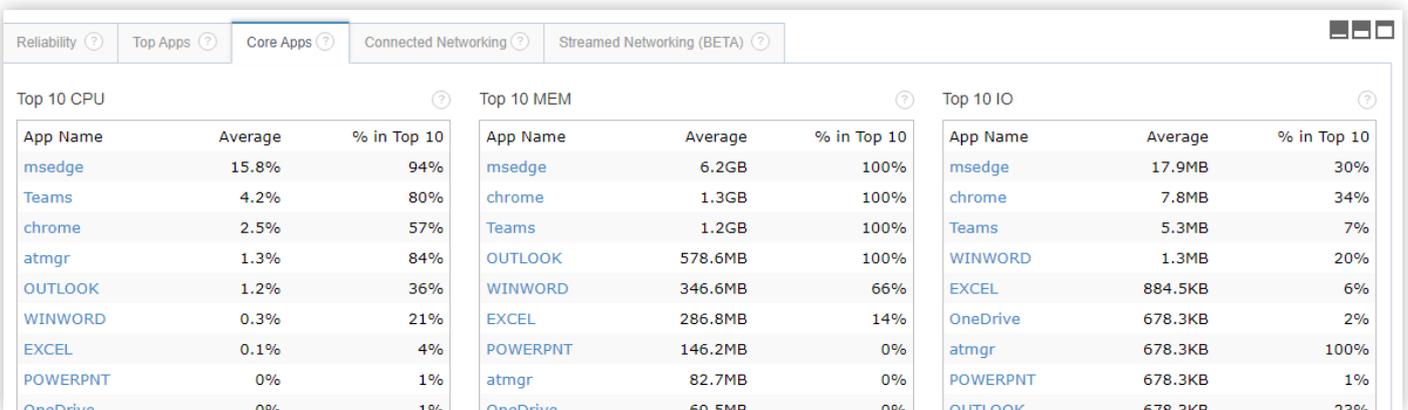


Figure 16 Monitoring CPU Usage for Outlook (w/ Salesforce Add-in)

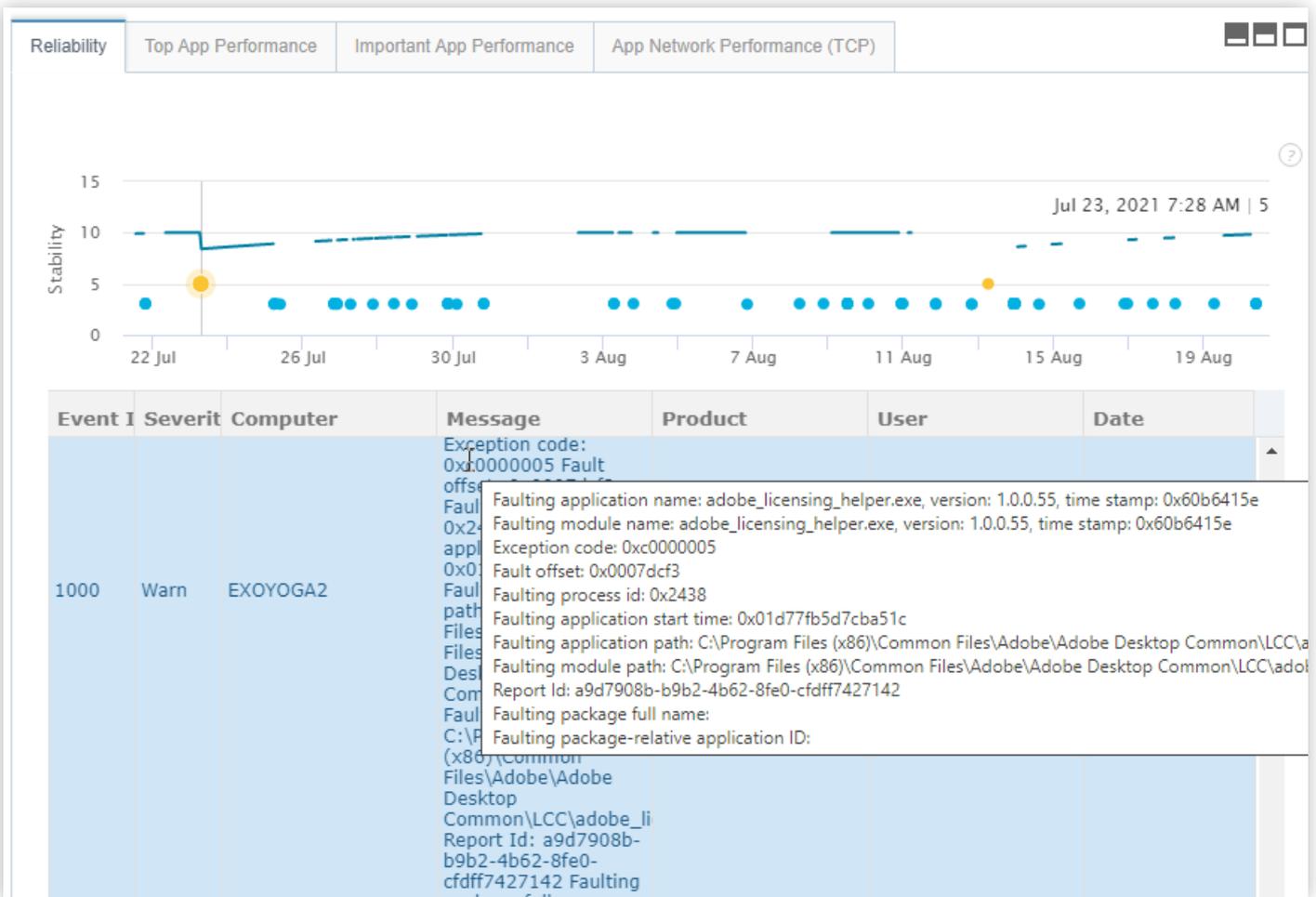


Figure 17 Stabilize Outlook and Salesforce App Performance



Better Performance, Incredible Results

Optimize Salesforce Experience End-to-End.

Don't get caught up with slow performance. Get your reps back into the deal.

Salesforce application optimization is an ongoing task for network admins in any company. Whether you are concerned about monitoring Salesforce uptime and availability or the end-user CRM experience in a browser, Exoprise offers both in a single platform.

Using real-time insights derived from the Service Watch tool, IT administrators are immediately set into action and improve their troubleshooting skills with hard telemetry evidence.

Try Exoprise today and see the difference for yourself!

Learn More



REQUEST A DEMO

[Learn how](#) Exoprise helps deliver optimal end-user experiences with real-time visibility and crowd-powered analytics.

We will demonstrate our synthetic and real-user monitoring solutions, answer questions, and help with additional insight.



Get Started With Exoprise Today

FREE TRIAL

Get the best of both worlds in one single Exoprise platform and start a free [15-day trial](#). DEM offers excellent employee experiences and valuable business outcomes.



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