



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. salesforce salesforce

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 network 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 <u>Exoprise-con-</u> trolled public sites.

Create an account with <u>secure.exoprise.com</u>, 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.'

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? Help	~	What are the steps? 1. Download and install the Management Client 2. Sign back in, come back to this page and click this button below 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

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- Navigation >	CATEGORIES All					
- Edit Sensors	New! Office 365					
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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 application 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.

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0	Service Watch	~	Username: *	sfadmin@exoprise.com	
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ø	Admin	~	Password: *		
?	Help	~		Enter the password for the account	
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				When encountering a split user/pass form, the sensor will try to identify the user input form, whi case this lets you specify the name or id of the user input field to help identify such forms.	ich could fail. In which

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.

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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.

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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.



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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.

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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



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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.





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Figure 12 Salesforce and Outlook Desktop App Integration Example

To get started deploying Service Watch Desktop, create a <u>Service Watch Desktop configuration</u> 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.

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

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



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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 14 Select the Salesforce Configuration

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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.





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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.

Reliability ?	Top Apps ? Core Apps ?	Connected Networking ③ Streamed Networking (BETA) ③						
Top 10 CPU			Top 10 ME	EM		Top 10 IO		
App Name	Average	% in Top 10	App Nam	ne Average	% in Top 10	App Name	Average	% in Top 10
msedge	15.8%	94%	msedge	6.2GB	100%	msedge	17.9MB	30%
Teams	4.2%	80%	chrome	1.3GB	100%	chrome	7.8MB	34%
chrome	2.5%	57%	Teams	1.2GB	100%	Teams	5.3MB	7%
atmgr	1.3%	84%	OUTLOO	K 578.6MB	100%	WINWORD	1.3MB	20%
OUTLOOK	1.2%	36%	WINWOF	RD 346.6MB	66%	EXCEL	884.5KB	6%
WINWORD	0.3%	21%	EXCEL	286.8MB	14%	OneDrive	678.3KB	2%
EXCEL	0.1%	4%	POWERP	NT 146.2MB	0%	atmgr	678.3KB	100%
POWERPNT	0%	1%	atmgr	82.7MB	0%	POWERPNT	678.3KB	1%
OneDrive	0%	1 %	OneDrive	60 5MB	0%	OUTLOOK	678 3KR	23%

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





Figure 17 Stabilize Outlook and Salesforce App Performance





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