

UX Design

Overview of Access and Interaction Model for CRM Applications

SyWay applies a unified access model that ensures users interact with Salesforce and core CRM Modules in a consistent and secure way, regardless of device type or location. We define access according to the device being used, the classification of the data being handled, and the role of the user. All corporate devices are managed through Intune. This ensures that laptops, PCs, and mobile devices remain compliant and secure before connecting to company systems.

This document describes access in terms of two concepts: Access Channels and Digital Touchpoints.

1. **Access Channels:** These are the devices and entry points that people use to reach CRM, for example a corporate laptop, a managed mobile device, or controlled third-party access.
2. **Digital Touchpoints:** These are the applications and platforms where users perform their work, for example Work Zone Standard, Salesforce Mobile App and Web Browser

Layer	What it represents	Examples
Access Channels	How users physically reach CRM System	Corporate Laptop, Mobile Device, or Third-Party Access (TPA)
Digital Touchpoints	Where users perform their work once inside	Work Zone Standard, Salesforce Mobile, Web Browser

Matrix: Digital Touchpoints vs Access Channels

INTERNAL USERS

	Corporate Laptop	Personal Laptop	Managed Mobile Device	Unmanaged Mobile Device	Third-Party Access (TPA)
Web Browser	Yes	Yes	No	No	Yes
Salesforce Mobile	No	No	Yes (Tablet and Smartphone)	Yes (Tablet and Smartphone)	Yes (Tablet and Smartphone)
Work Zone Standard	Yes	No	No	No	No

CUSTOMERS/PARTNERS

	Customer Laptop	Customer Mobile Device
Web Browser	Yes	Yes (Smartphone and Tablet)
Salesforce Mobile	No	No
Work Zone Standard	No	No

Access Channels

Access channels encompass the devices and touchpoint users leverage to connect with **Salesforce** and integrated enterprise tools. This ensures every user—regardless of role or location—experiences a secure, consistent, and **optimized path** to their CRM data.

Syensqo Corporate Laptops

Corporate laptops, managed through **Intune**, are the standard for Salesforce access. This management layer verifies **device health and security** before connection. By adopting a **browser-first architecture**, Salesforce will be used through web browsers, providing secure and consistent experience without the need for any local software installations.

Personal Laptops

Personal laptops provide unmanaged access to Salesforce, bypassing the **Intune device management** platform. **Web-based protocols** will ensure security, replacing the need for devices to comply directly. As there are no IP restrictions user can access the Salesforce application from any laptop. Because we use **browser-first architecture**, all Salesforce features can be accessed online, ensuring that no company data or applications are kept on your personal device.

Managed Mobile Devices (Personal, Corporate)

Corporate and Intune-enrolled Personal devices are managed centrally to enforce security compliance for Salesforce access. High-usage applications (e.g., Salesforce Mobile) can be automatically provisioned else it can also be made available in the company app catalog. All managed devices utilize Single Sign-On (SSO), ensuring a consistent and secure transition between Salesforce and other enterprise mobile applications.

Unmanaged Mobile Devices

For devices not managed by Intune, access to Salesforce is governed by the same authentication mechanisms as managed devices (OAuth combined with SSO). Users are responsible for the manual installation and updates of the Salesforce Mobile app. While SSO provides a streamlined experience, users must ensure their device meets minimum OS and browser requirements to maintain a stable and secure connection to company systems.

Third-Party Access (TPA)

Third-party personnel, such as contractors or consultants, will access Syensqo Salesforce applications through SSO & MFA governed access.

Digital Touchpoints

Digital touchpoints represent the applications and platforms where users actually perform their work once they have accessed the environment through an approved Access Channel. The objective is to provide a consistent experience across different applications and related enterprise solutions, regardless of device or entry point.

Work Zone Standard

SAP Build Work Zone Standard serves as the central entry point for all user access. It will now feature a dedicated **Salesforce tile** (Which launches Salesforce via simple URL redirection) for seamless access to Salesforce CRM. It also links to other enterprise solutions such as S/4HANA, SuccessFactors, Ariba, and Concur where the role requires them. This gives users one consistent environment to access everything they need—including **Salesforce**—without having to remember multiple system names or maintain separate logins.

Work Zone combines content across the IT landscape into a single, role-based experience. For example, a **Sales Executive** can now launch **Salesforce** directly alongside their S/4HANA sales orders, while an HR user accesses Fiori workflows and SuccessFactors content. This unified model is a core design decision by SyWay, providing a consistent user experience and reducing fragmentation while keeping access governed via Single Sign-On (SSO)

For more information on refer link: <https://wiki.syensqo.com/display/public/ER/UX+Approach+-+Unified+Access+and+Interaction#UXApproachUnifiedAccessandInteraction-WorkZoneStandard>

Salesforce Mobile App

The Salesforce is not supporting access via web browser on Mobile & Tablet and the Salesforce mobile app is the official mobile version of the Salesforce CRM platform, designed to provide real-time access to business data from **iOS and Android** devices. It is included with all standard Salesforce licenses and serves as a primary method for users to stay productive while away from their desktops. Key Features of the mobile app which will be used are:

- **Unified Experience:** The app brings together Chatter, CRM, and custom business logic, allowing users to access custom objects, list views, and apps through a mobile-optimized interface. Not the full CRM scope should be covered by the Mobile App. Currently the following processes are in scope:
- **In scope:** Lead management, Opportunity management, Visit reports and Quote approvals.
- **Out of scope:** Quote lifecycle management, Contract management, Account planning and Marketing Campaigns.
- **Offline Capabilities:** Users can view and edit records without an internet connection. Changes made offline are automatically synced once a connection is restored.
- **Real-Time Notifications:** The app provides **push notifications** for mentions, approval requests, and other critical updates to ensure users can respond instantly to urgent business needs.

Web Browser

Accessing Salesforce via a web browser is the most comprehensive method for users, offering the full range of administrative, developmental, and end-user capabilities. This "full site" experience is primarily delivered through the Lightning Experience, a modern interface designed for laptop and tablet use.

Supported Browsers and Requirements

To ensure stability and performance, Salesforce recommends using the latest stable versions of the following:

- **Google Chrome:** Recommended for the best performance, especially when using the Salesforce Console.
- **Microsoft Edge:** Supported in its Chromium-based version; Internet Explorer mode is not supported.

- **Mozilla Firefox:** Supported, though Private Browsing mode is not compatible with Lightning Experience.
- **Apple Safari:** Supported for macOS and iPadOS (version 13.1 or later), where the iPad is treated as a desktop browser experience.

Technical Requirements

- **Screen Resolution:** A minimum of 1024 x 768 is required to display all features correctly.
- **Security Protocols:** Browsers must have JavaScript, cookies, and TLS 1.2 or higher enabled for secure data transmission.

For more information: [Browser Support and Considerations](#)