

What are Editions?

LinkPoint Connect Editions offer users various options for solving their unique email integration needs. Each Edition provides a different approach to record emails, update Salesforce fields, and sync calendars, contacts, and tasks.



Desktop Edition

Classic for PC users. Record emails, create new contacts or leads, and auto-sync calendars, contacts, and tasks.



Desktop Plus Edition

Everything from Desktop Edition... Plus you can add meeting notes and update Salesforce fields from the Side Panel or a dedicated mobile app.



Cloud Edition

Server-side version for mobile and cross-platform users. Auto-sync calendars, contacts, emails, and tasks. Works for Mac, Mobile, and PC.

Choosing the Right Edition

LinkPoint Connect Editions were designed to meet client need across a variety of use cases. The following examples are common reasons why customers choose one (or more) Edition for their email integration. Contact your Account Executive or sales@linkpoint360.com to discuss the best fit for your organization.

We need to see CRM data in our email application.

-  Both Desktop and Desktop Plus Editions include a Side Panel that installs directly inside Microsoft Outlook or IBM Notes. Desktop Plus includes the extra ability to add notes or update Salesforce fields for specific records with a custom Q&A approach.

Our teams are not logging their call notes to Salesforce.

-  Desktop Plus makes call logging easy with a custom Q&A approach that users can access from their Side Panel in Outlook or IBM Notes. For users who spend their time in the field, our dedicated mobile app simplifies the process to recap a meeting with easy touch-and-swipe data entry.

Our users mainly work in our office and have PCs.

-  Desktop Edition meets the productivity needs of internal teams for recording emails or syncing data to Salesforce.

We have a mix of PC and Mac users and need emails recorded to Salesforce.

-  Cloud Edition automates email syncing on a server level, which means there is nothing to install... and a blend of PC, Mac, and mobile users can record to Salesforce.

Our field reps aren't updating their calendars in Salesforce and we need the information for reporting.

-  Cloud Edition can automate calendar syncing between Exchange and Salesforce. As your reps create meetings (either from a PC, Mac, or mobile device), Cloud Edition will move the information to Salesforce based on the rules you set.

Our users work across any number of devices. But they need access to Salesforce inside their email client from their primary computer.

-  Desktop Edition and Cloud Edition do have some overlapping functionality. However, Cloud Edition does not include a Side Panel. Customers who want controlled auto-sync functionality subscribe to Cloud Edition and then add Desktop Edition licenses for their PC users who also need access to the Side Panel.

We want our users recording only select emails to Salesforce.

-  Desktop Edition lets users one-off record emails to select Salesforce records from within Microsoft Outlook from a PC. For Mac, mobile, and cross-platform users, Cloud Edition includes a Designate Mode that allows users to flag specific emails to sync automatically to Leads and Contacts. Smart Address tags also let users one-off record emails to specific Salesforce records such as Accounts and Opportunities.

Features

	Desktop Edition	Desktop Plus Edition	Cloud Edition
View CRM Data with Side Panel	✓	✓	
Record Emails Manually	✓	✓	
Record Emails Automatically			✓
Sync Calendars	✓	✓	✓
Sync Contacts	✓	✓	✓
Sync Tasks	✓	✓	✓
Create & Update Records with Smart Forms	✓	✓	
Capture Meeting Notes		✓	
Update Specific Salesforce Fields		✓	

Platforms

	Desktop Edition	Desktop Plus Edition	Cloud Edition
PC Installation	✓	✓	
Mac Support			✓
Mobile Support		✓	✓
Microsoft Outlook (in-app integration)	✓	✓	✓
Microsoft Exchange (direct integration)			✓
IBM Notes	✓	✓	
Salesforce	✓	✓	✓
Microsoft Dynamics CRM	✓		
InforCRM	✓		