LinkPoint Connect: Cloud Edition
Product Overview

Experience LinkPoint Connect's highly configurable sync tools in an innovative cloud platform with a server-side, email-to-CRM integration solution for companies looking for even greater flexibility and workforce productivity.

Highlights

LinkPoint Connect: Cloud Edition synchronizes emails, calendars, and tasks directly between Microsoft Exchange and Salesforce from any device using cloud technology. Experience even greater freedom from flip flopping between systems with access to the data you need most, when and where you need it. Work seamlessly between your mobile phone, tablet, web mail, or desktop. The emails you send and receive, tasks you create, and appointments you set will automatically sync between Exchange and Salesforce based on the frequency, timing, and parameters you choose.

Flexible Configuration Options

LinkPoint Connect: Cloud Edition users have a variety of controls to ensure that data moves how and when they want it to between Exchange and Salesforce. A one-time configuration is all it takes for users to send emails and create calendar items while knowing data is flowing to the correct system of record.

- Sync one-way or bidirectional with separate settings for emails, calendars, and tasks
- Choose how far back or how far in the future the sync will run on dated items
- Exclude (or include) calendars, and tasks that are marked as private
- Set how calendars and tasks are created, updated, or deleted in Exchange or Salesforce
- Control the intervals during which the sync will run

Role-Based Permissions

LinkPoint Connect: Cloud Edition gives organizations the opportunity to leverage admin-level controls to dictate how, what, and where items are syncing between individual user Exchange accounts and Salesforce. Large organizations with different divisions, branches, departments, and teams can set up a hierarchy and assign trickle-down permissions with unique differences between groups to reflect their workflow or level of access. Specific sync settings can be established for profiles and deployed as defaults, with the option to prevent end users from changing the settings. As people move about the organization, admins can update end user permissions by simply assigning the user to a different profile. LinkPoint Connect: Cloud Edition can also be configured to allow individuals to establish their own sync settings and have control over the way their data moves between Exchange and Salesforce.

Ease of Use

LinkPoint Connect: Cloud Edition is designed to make users even more productive throughout their workday. Once the sync rules are set, users can focus on closing deals and clearing queues from any device (mobile or desktop) without wondering if and how their data is being managed. Calendars and tasks can be created once, wherever it is most convenient, and then left to sync automatically. LinkPoint Connect: Cloud Edition scans each user's Exchange account for new inbound or outbound messages and sync them to matching Salesforce Leads or Contacts. Users can also take advantage of Smart Address. When sending an email, the user can insert a specific Salesforce object, such an Opportunity or Case, in the Bcc field. When the email is sent, Smart Address will record the email to the Salesforce record in addition to any matching Lead or Contact records based on the email's recipients.

Access

LinkPoint Connect: Cloud Edition connects Microsoft Exchange and Salesforce accounts. The tool syncs emails, calendars, and tasks from any device or platform where the connected Exchange account is in use. Users can work between mobile phones, tablets, web mail, or desktop environments for both PC and Mac. All Salesforce Editions are supported.