

Admin Quick Start Guide

LinkPoint Connect: Cloud Edition (Exchange + Salesforce)

Get Going with LinkPoint Connect: Cloud Edition

It's easy to get going with your LinkPoint Connect: Cloud Edition subscription. By now, your account is set up and you have access to your Organization inside of Cloud Edition. Here's a quick guide to get up and running.

- 1. Connect to Salesforce.** Even if you do not plan on using the software yourself, you will need to connect to your Salesforce account in order to invite your end users.
[Step-by-Step Guide](#)
- 2. Create Your Profiles.** If you want to organize your users based on your current workflow, create your Profiles in advance. If you plan on having all of your users set their own sync rules or you want everyone working the same way, skip this step.
[Step-by-Step Guide](#)
- 3. Choose Defaults and Locked Settings.** Want certain Profiles syncing certain ways? Select a Profile and then select the sync settings you want to apply. Choose a setting to make it a default (which end users can change). Click the lock icon to lock the setting and prevent your users from changing it.
Defaults: [Step-by-Step Guide](#) Locking: [Step-by-Step Guide](#)
- 4. Invite Your Users.** Add your end users with a quick import tool that finds them in your Salesforce account. Search for users, flag them for one of the Profiles you created, and click Import to start the process. Each user will receive an email, prompting them to create a password and walking them through the Salesforce and Microsoft Exchange configuration. And if you preconfigured and enabled their sync already, they'll begin syncing data once they connect.
[Step-by-Step Guide](#)

Maximize your Cloud Edition experience...

We want you to use LinkPoint Connect: Cloud Edition to its full potential. Here are some handy resources to help you along the way.

- [Searchable Knowledge Base](#): Detailed articles for each LinkPoint Connect function
- [Video Library](#): Guided tutorials of specific Cloud Edition features including Set Up and Sync
- [LinkPointers Webinars](#): Live demonstrations on various topics with audience Q&A

Need something else? We're here to support you.

[Chat live with a support specialist](#) or [send a ticket via email](#) to our support team. You can also call +1 732.212.8402 to speak with LinkPoint360 Support.

Questions about your subscription? [Email us](#) or call +1 732.212.8401 to connect with an Account Executive.