

End User Quick Start Guide

LinkPoint Connect: Cloud Edition (Exchange + Salesforce)

Get Going with LinkPoint Connect: Cloud Edition

Welcome to LinkPoint Connect: Cloud Edition. You're invited to set up an account to sync your Exchange and Salesforce – eliminating manual data entry while ensuring that your emails, calendars, contacts, and tasks are in the systems that matter most. Set up takes just a few minutes. Here's a quick guide to get up and running.

- 1. Check Your Email.** You should receive an email from LinkPoint360 titled *Welcome to LinkPoint Connect*. 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.
- 2. Follow the Wizard.** Our setup wizard will walk you through creating a Cloud Edition password, connecting to Salesforce, and connecting to Microsoft Exchange. You will need to know the username and password for both your Salesforce and Exchange accounts.

[Step-by-Step Guide](#)

- 3. Set Your Sync.** Visit the My Settings Page to set your Calendar, Contact, Email, and Task sync. Choose your Sync Mode and set your configuration. You can even choose when and how often to sync or whether to sync one way or bidirectionally. If any of these options are locked down for you, then your Admin has already preconfigured the sync for you...and your work here is done.

[Step-by-Step Guides](#)

- 4. Prevent a Sync?** Looking to stop certain items from syncing? Remember, you can make an item Private to exclude it from syncing. For emails and calendar items, you can add **DoNotSync** category in Exchange or use the **Do Not Record** Smart Address. Contact Sync will only pick up the Exchange Contacts you place in the **SF Contact Sync** folder, so leave them out if you want to exclude them.

Get more out of Cloud Edition...

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

- [Smart Address](#): One-off record emails and calendar items to Salesforce “what” records like Accounts.
- [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.

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