LinkPoint Connect User Guide

Server Deployment

Version 6 Release

LinkPoint360

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Overview

LinkPoint Connect: Cloud Edition

LinkPoint Connect: Cloud Edition synchronizes calendars, contacts, emails, and tasks directly between Microsoft Exchange and Salesforce from any device with a server-level integration. 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 and across PC, Mac, and mobile (iOS/Android) platforms.

The appointments you set, contacts you own, emails you send and receive, and tasks you create will automatically sync between Exchange and Salesforce based on the frequency, timing, and parameters you choose. All Cloud Edition sync settings are accessible via web browser and can be configured at the end user or Admin level based on company preference.

Understanding Cloud Edition Sync Functionality

Cloud Edition is designed to simplify the process of synchronizing your calendar, contact, email, and task data between Microsoft Exchange and Salesforce. Users can seamlessly connect existing accounts without the need to manually input sales leads and client information into two separate destinations.

Cloud Edition synchronizes calendars, contacts, emails, and tasks between the two systems using configurable automatic sync functionality. Organizations or users can decide how they would like to manage their sync settings based on how they use Exchange and Salesforce throughout the day.

Cloud Edition can be configured to synchronize automatically using custom settings set by an Admin for specific Profiles or on an end user basis with some or no defaults in place to give users more control.

Functionality highlights include:

- Customize the flow of information between Microsoft Exchange and Salesforce
- Configure the synchronization to your specific preferences
- Sync one-way or bidirectional with separate settings for calendars, contacts, emails, and tasks
- Choose how far back or how far in the future the sync will run on dated items
- Set the synchronization run times and frequency
- Record emails directly to Salesforce based on contact or lead email address
- Use Smart Address to relate emails and calendar items to Salesforce records such as Opportunities
- Set how calendars, contacts, and tasks are created, updated, or deleted in Exchange or Salesforce
- Sync email attachments to Salesforce one off or automatically
- Manage sync settings via a convenient web browser interface for account management

Conflicting Software

Warning: Before enabling any of the sync options available with Cloud Edition, be sure to disable any other syncing tools or conflicting software you may already be using. This includes LinkPoint Connect: Desktop Edition (for current customers or free trial participants) as well as other tools on the market from competitors. Failure to disable conflicting or redundant software prior to enabling sync for Cloud Edition could compromise the integrity of your data: creating duplicates in Exchange or Salesforce or deleting information from one (or both systems) of record which cannot be restored.

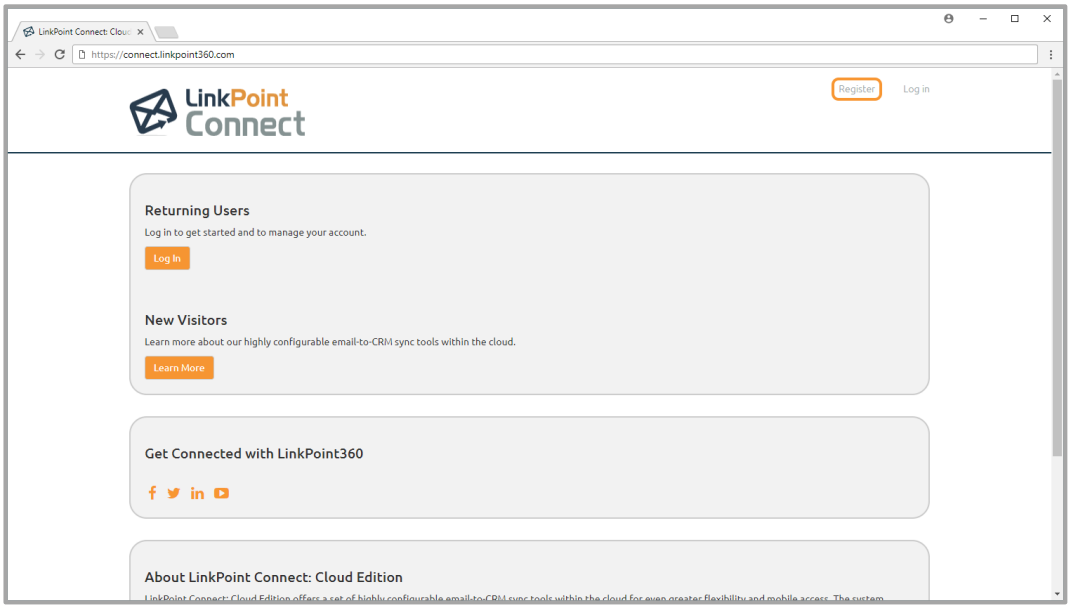
Getting Started

Creating a Cloud Edition Account

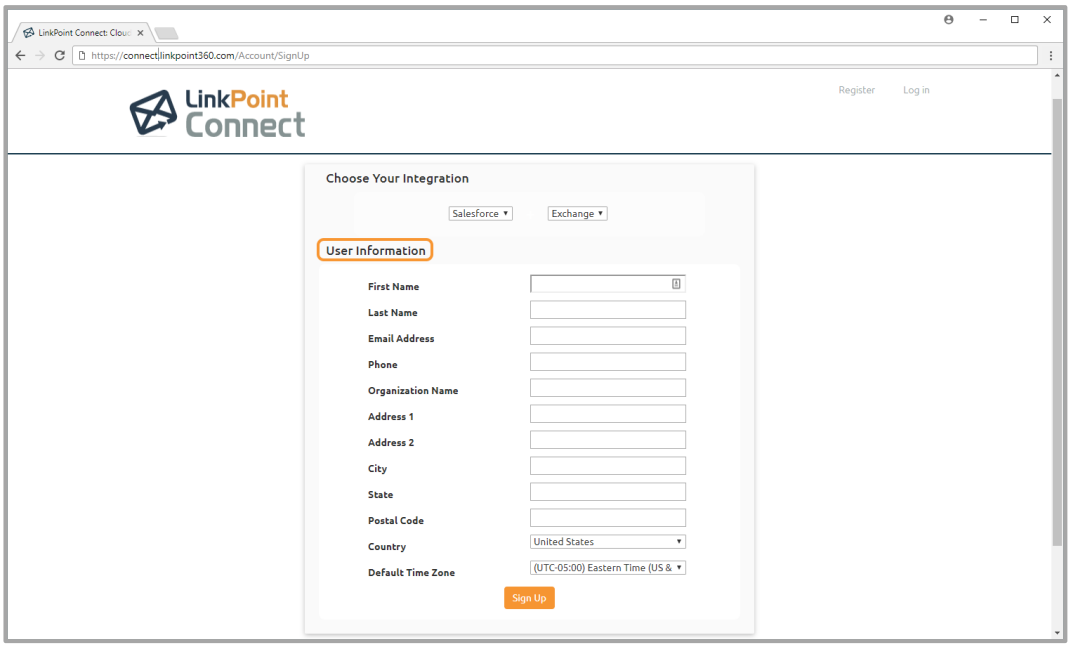
Cloud Edition is based on a tiered hierarchy to enable companies to set specific sync and access settings for various groups of users. When getting started, each company should create one Organization account for all of its users. If you are an individual user, you can create an Organization for yourself. In this section, you will learn how to sign up for and access Cloud Edition to create a new account.

Additional Resources: Learn more about tiered hierarchy in the **Working with Hierarchy and Permissions** section of this User Guide.

1 Visit https://connect.linkpoint360.com, and select the **Register** link.



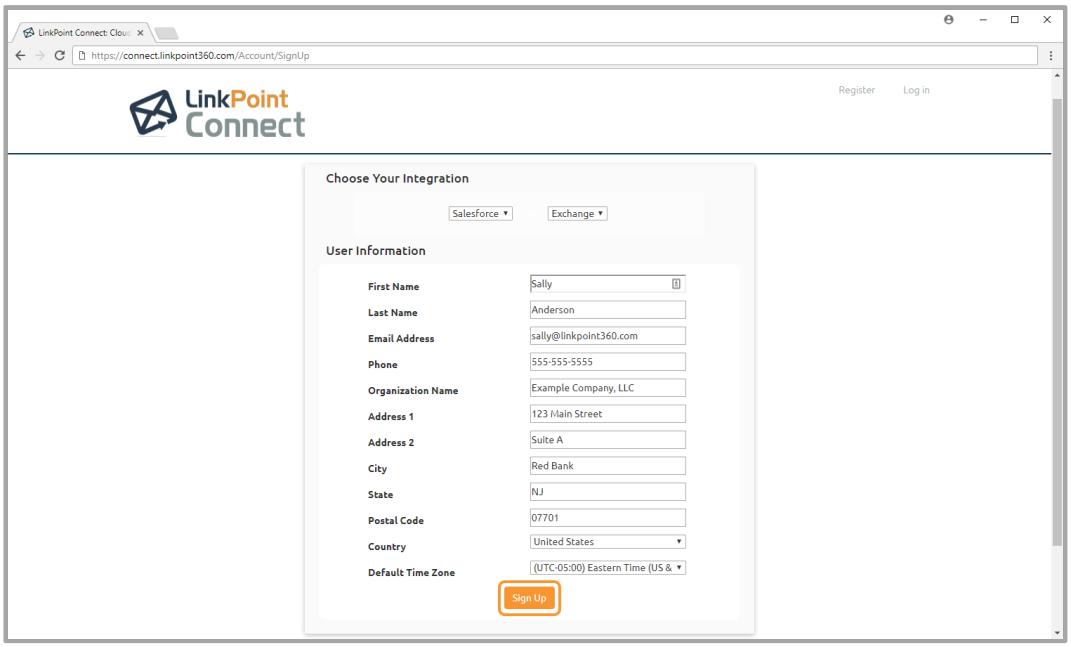
2 Enter your information in the **User Information** fields.



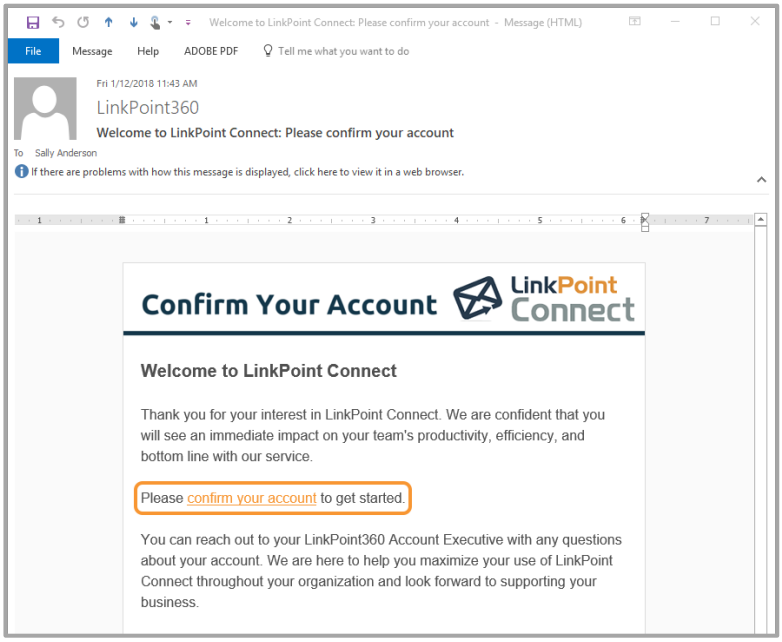
Tip: Cloud Edition currently supports integration only for Exchange and Salesforce users. You will not need to make a **Choose Your Integration** selection to move forward.

Tip: If you are setting up Cloud Edition for a larger organization, be sure to use the credentials for the person who will serve as your Admin.

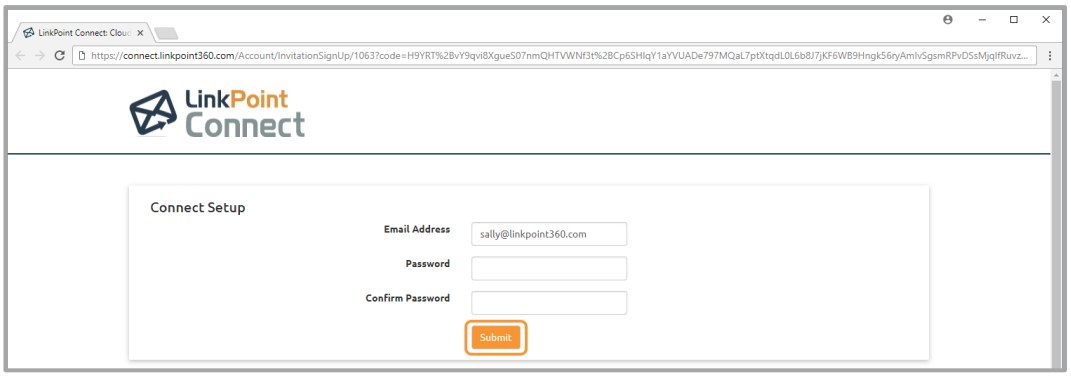
3 Click the **Sign Up** button when you are finished entering the required information.



4 Check your email and locate the message with the subject line **Welcome to LinkPoint Connect: Please confirm your account.** Select the link provided in the email to **confirm your account**.

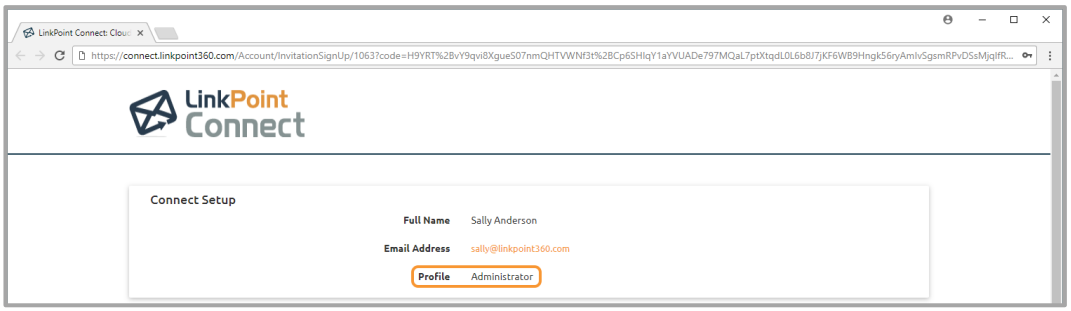


5 Enter a password for your Cloud Edition account in the **Password** and **Confirm Password** fields for the Connect Setup wizard, and click **Submit**.

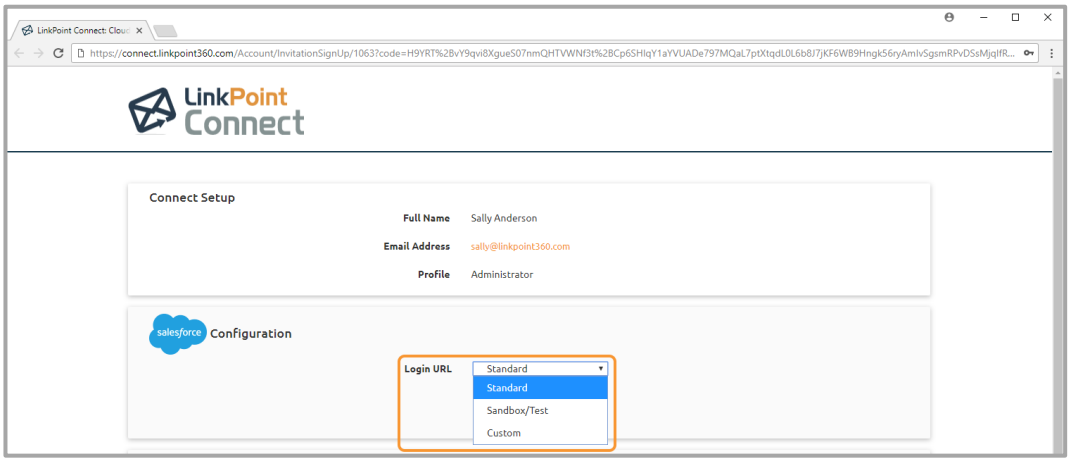


Tip: Your password must contain a minimum of 8 characters.

Tip: The initial user on every new Cloud Edition account is created as an *Administrator*. Admins can then choose to set up other users on their account with specific Profiles.



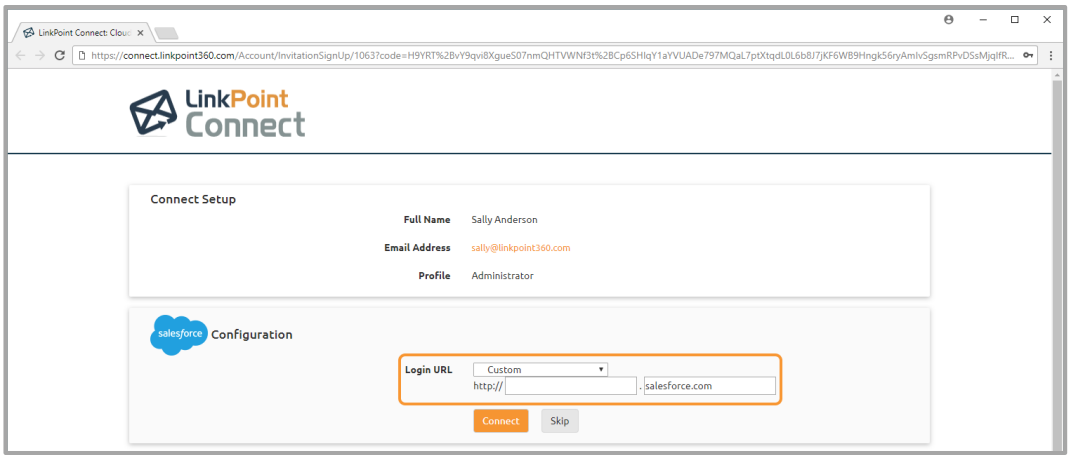
6 Select a Salesforce **Login URL** from the drop-down list.



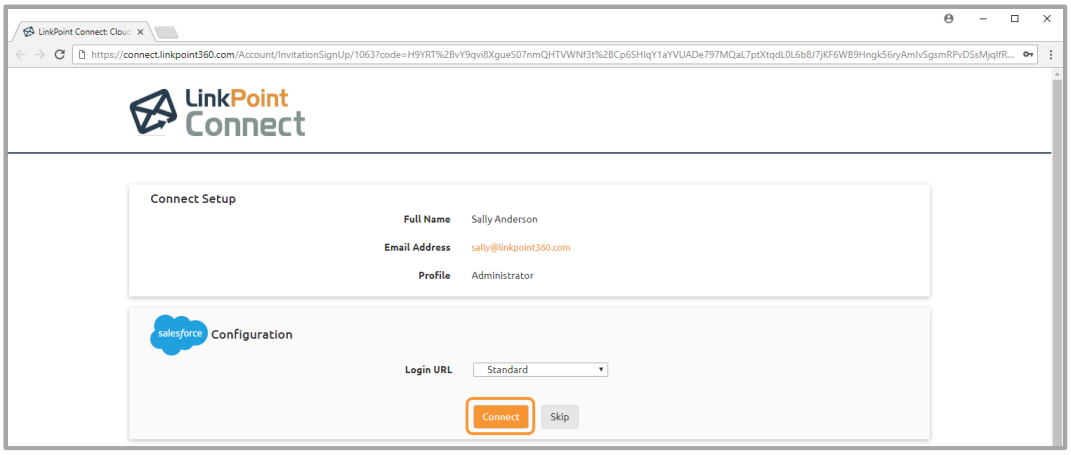
Tip: The default setting is *Standard*. You will want to use this option unless:

- You are testing with a Salesforce Sandbox or Test account. In this case, select *Sandbox/Test*.
- You are using a custom URL to access Salesforce as defined by your organization. In this case, select *Custom* and enter the URL details.

If you are unsure which option to select, check with your internal Salesforce admin.

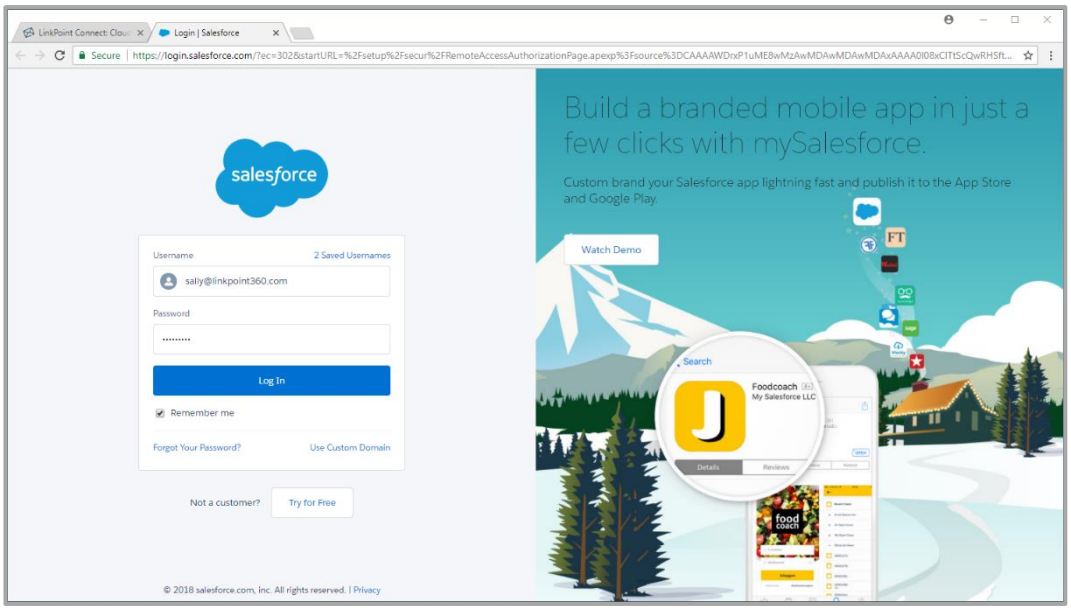


7 Click **Connect**.

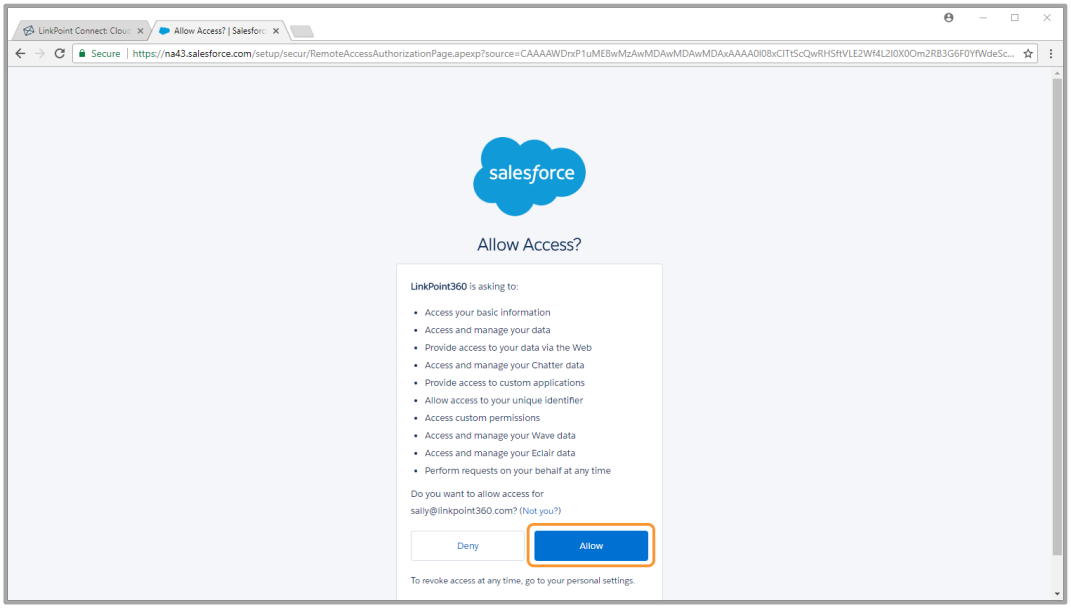


Tip: You may need to allow pop-up windows in your web browser from https://connect.linkpoint360.com.

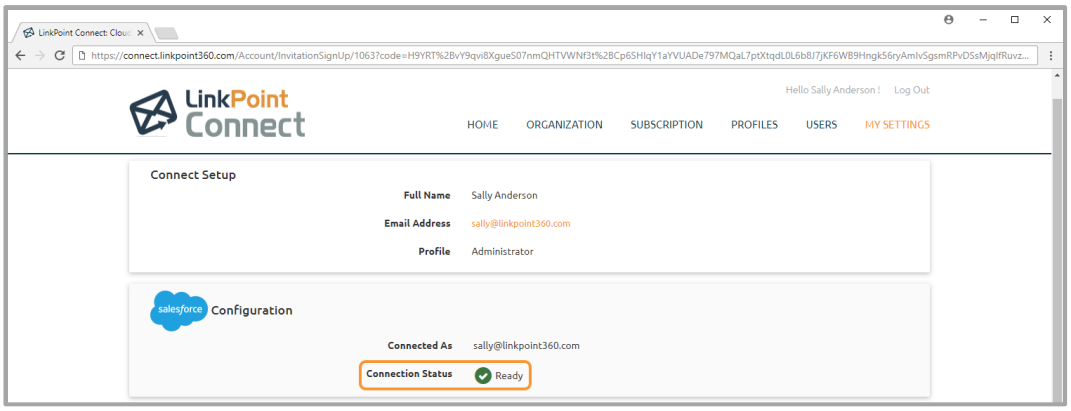
8 Enter your Salesforce credentials. This may automatically process if you are already logged into Salesforce.



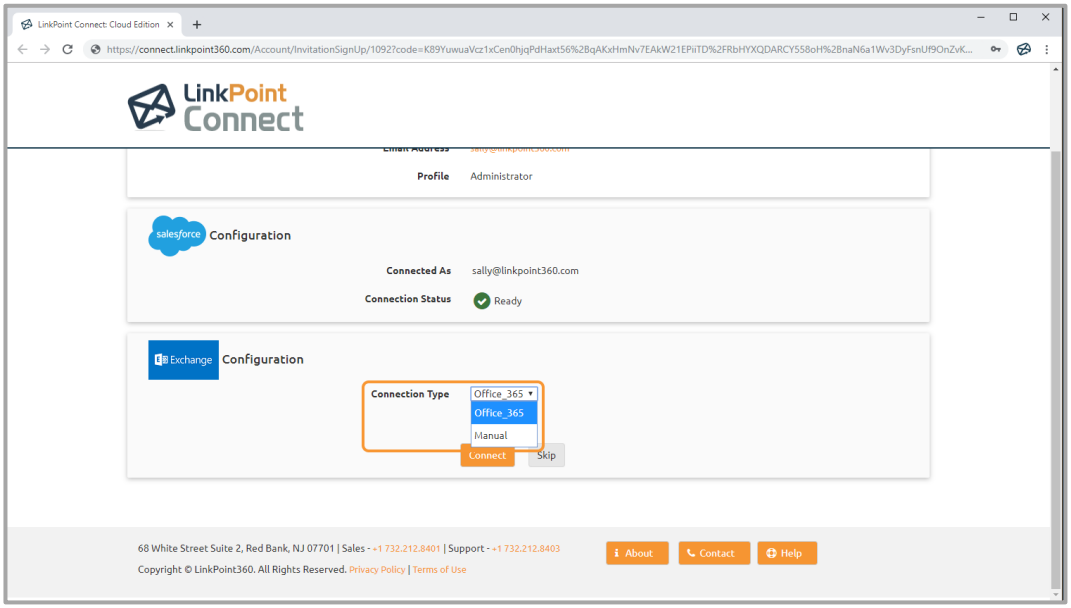
9 Click **Allow** to permit **LinkPoint360** to access your Salesforce account.



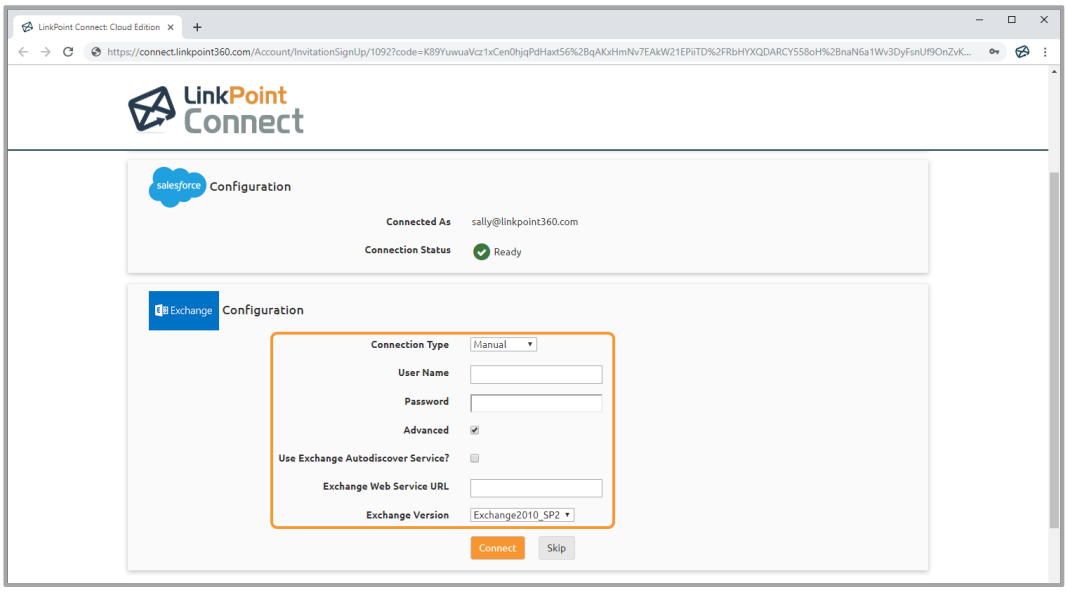
Tip: A **Connection Status** of *Ready* is displayed once the Salesforce account is connected.



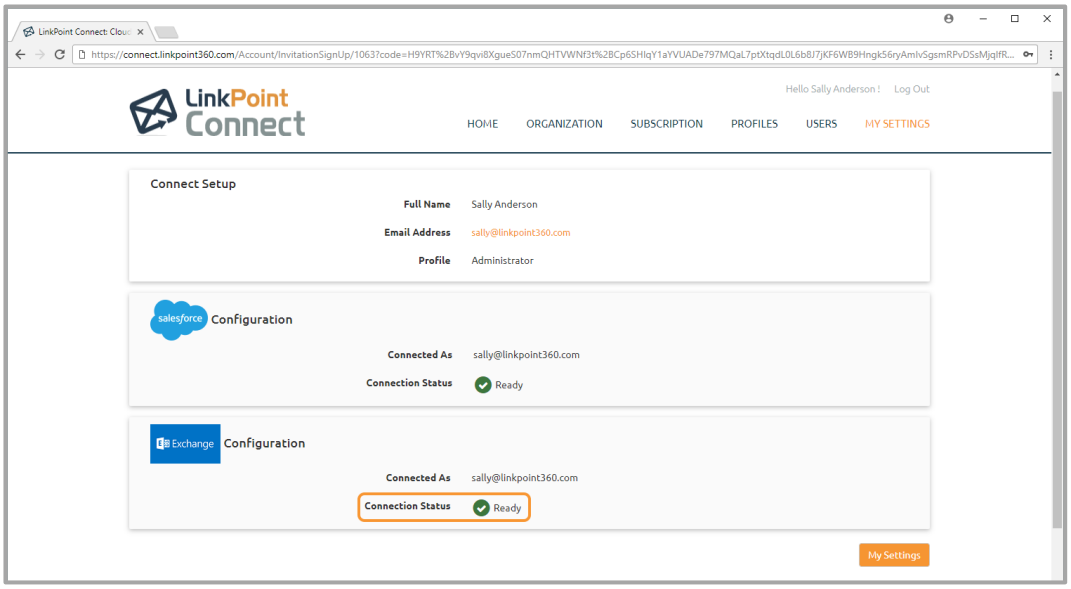
10 Select an Exchange **Connection Type** and authenticate your account. If you select Office_365, you will be prompted to log in via the web browser. If you select Manual, you will need to enter your Username and Password into the fields provided.



Tip: Some organizations configure their Exchange environments to block autodiscover connections. To troubleshoot, select the **Manual** option for **Connection Type**. Then select the **Advanced** checkbox and deselect the option to **Use Exchange Autodiscover Service?** Enter the **Exchange Web Service URL** and **Exchange Version** for your environment. This can be provided to you by your internal IT admin.

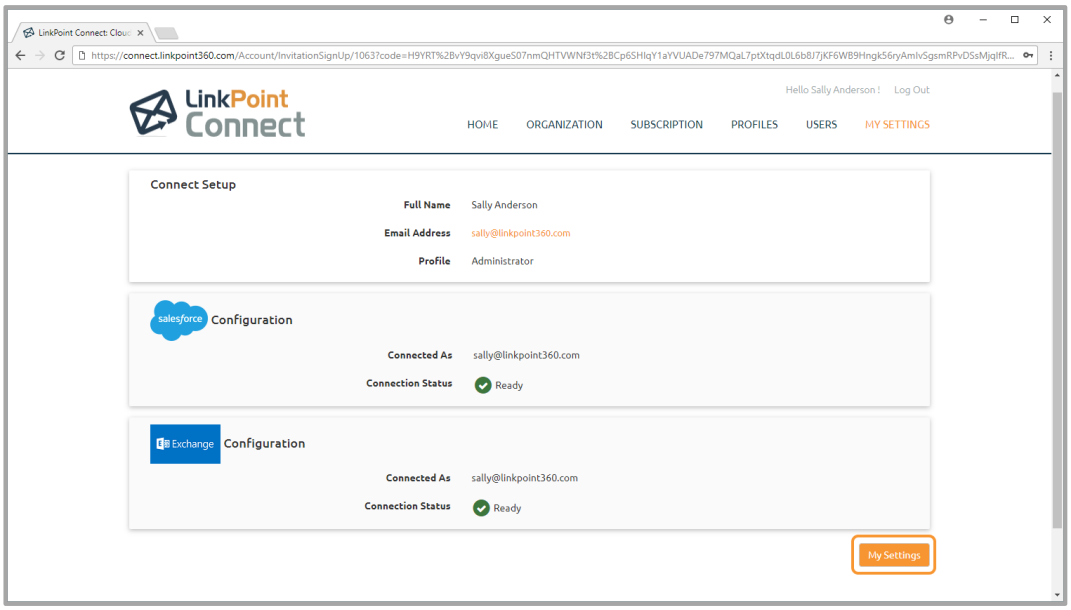


Tip: A **Connection Status** of *Ready* is displayed once the Exchange account is connected.



Warning: The Exchange Connection Type selected by the Admin when first creating a Cloud Edition account is set as the default value for all subsequent users. If an Admin changes their Exchange Connection Type at the User level at a later time, existing users will retain the original setting but all subsequent users will inherit the new selection as their default value.

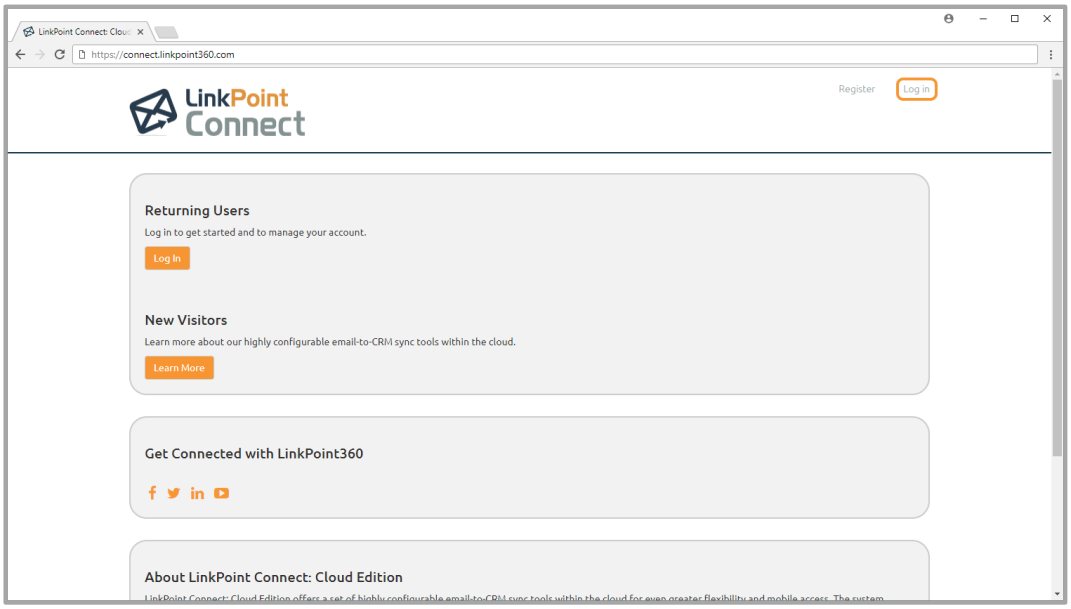
11 Click the **My Settings** button to proceed to your sync settings configuration.



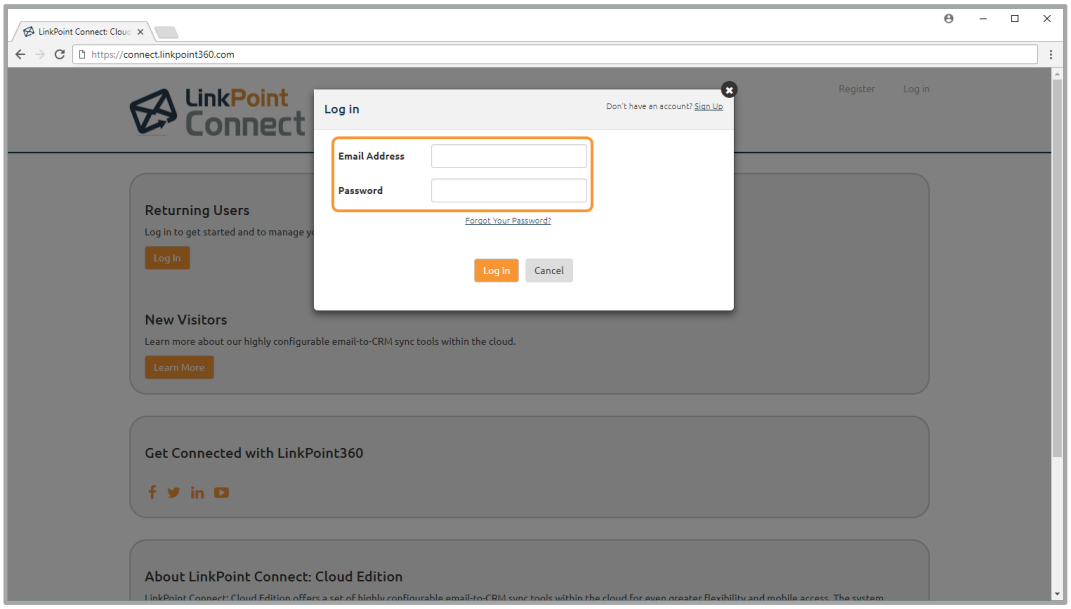
Logging In and Out of Cloud Edition

Cloud Edition is a web-based Software-as-a-Service (SaaS) application that can be accessed easily via any web browser. In this section, you will learn how to log in to and out of your existing Cloud Edition account.

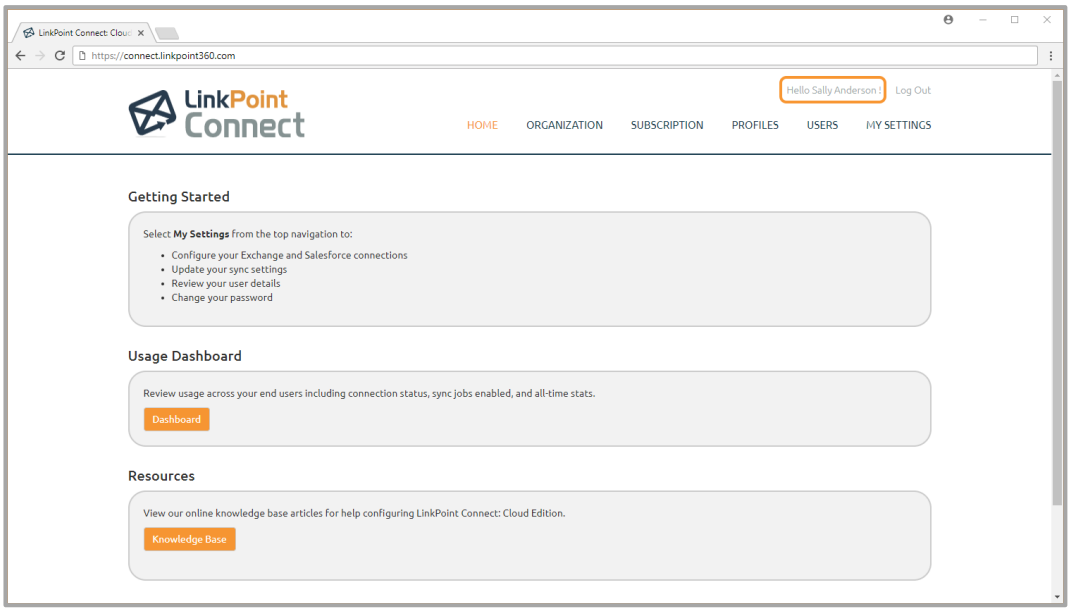
1 Visit https://connect.linkpoint360.com, and select the **Log in** link in the top right of the screen.



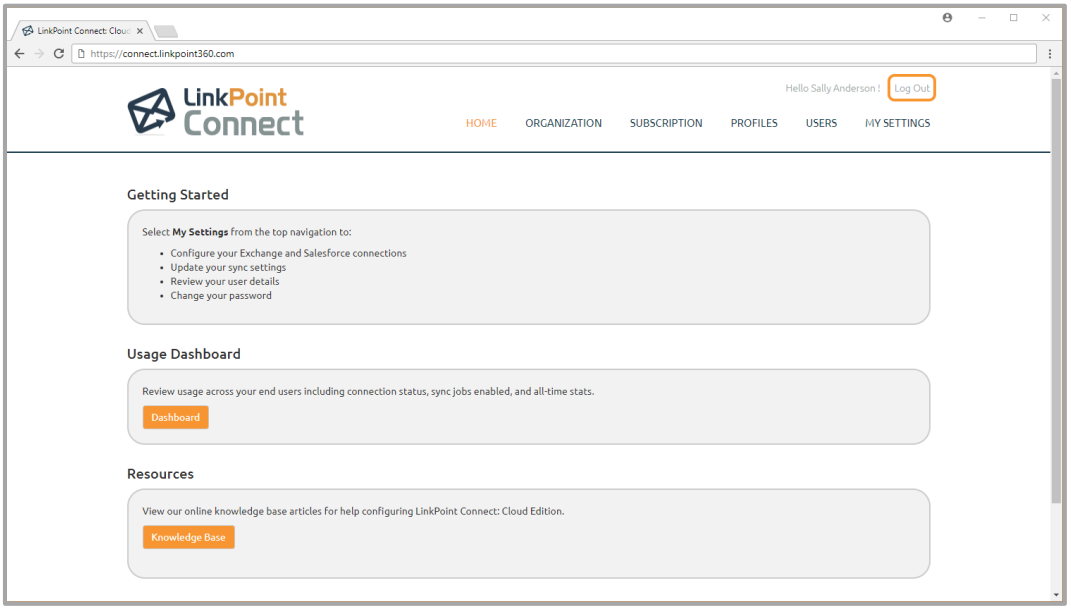
2 Enter your **Email Address** and **Password**. Then click the **Log in** button.



3 View the **Getting Started** screen. Note that the **Hello, First Name Last Name!** message at the top right of the screen indicates that you are actively logged into Cloud Edition.



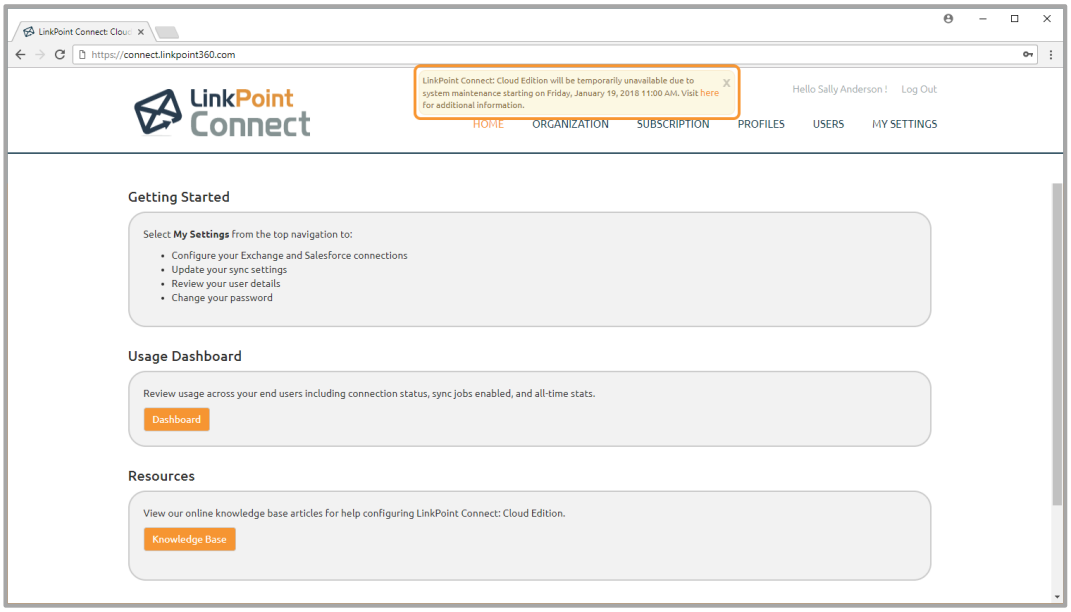
4 When you are finished, select the **Log Out** link in the top right of the screen at any time to securely close Cloud Edition and end your session.



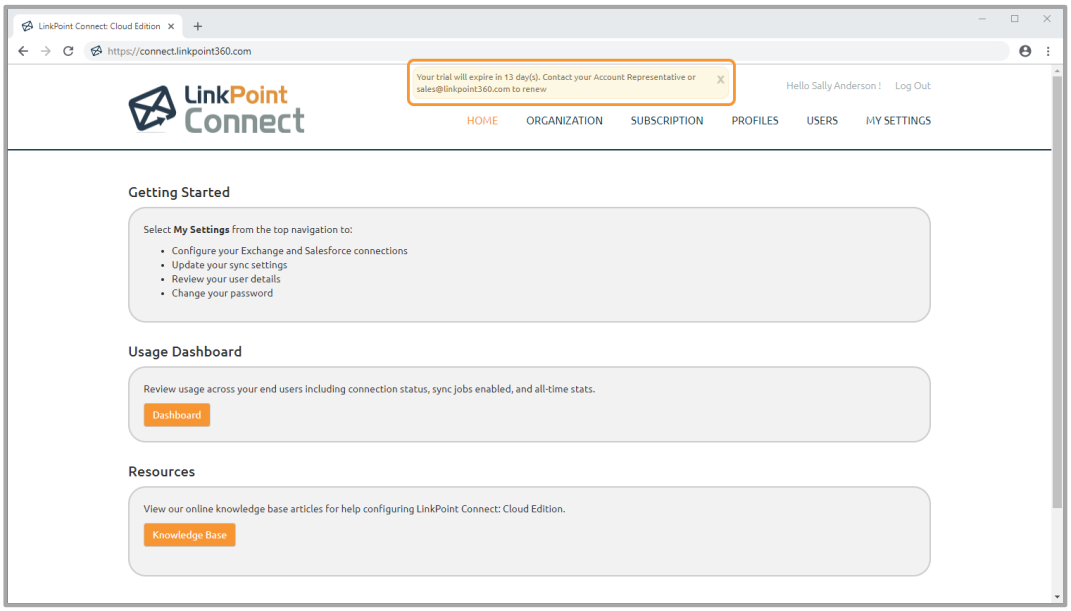
Warning: User sessions will time out after 30 minutes of inactivity. Any unsaved changes may be lost due to inactivity. Admins can configure the session timeout range to a minimum value of 15 minutes and a maximum value of 60 minutes at the Subscription Level.

Additional Resources: Learn more about how to configure the session timeout in the **Editing a Subscription** section of this User Guide.

Tip: A message is displayed in the header of the web portal to all users informing them of upcoming scheduled maintenance. This message is displayed once per day to each user once it is dismissed. Click the link to visit a status page for more information about the maintenance and site changes.



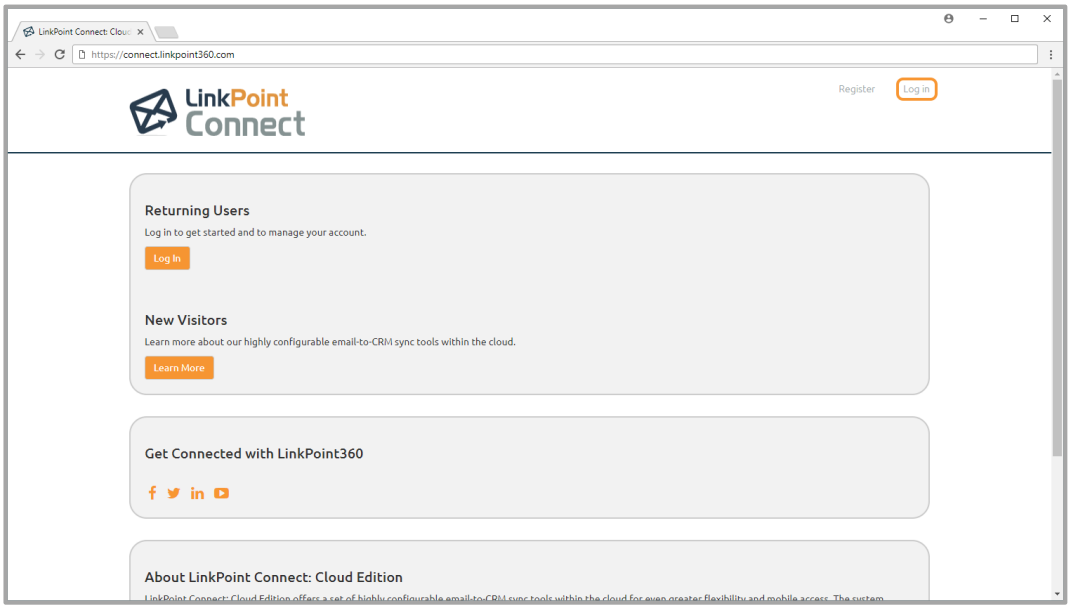
Tip: Messages are displayed for both Evaluation and Paid Subscriptions when licenses are close to or past expiration. These messages will indicate the number of days remaining and/or who to contact in order to renew or adjust your Subscription.



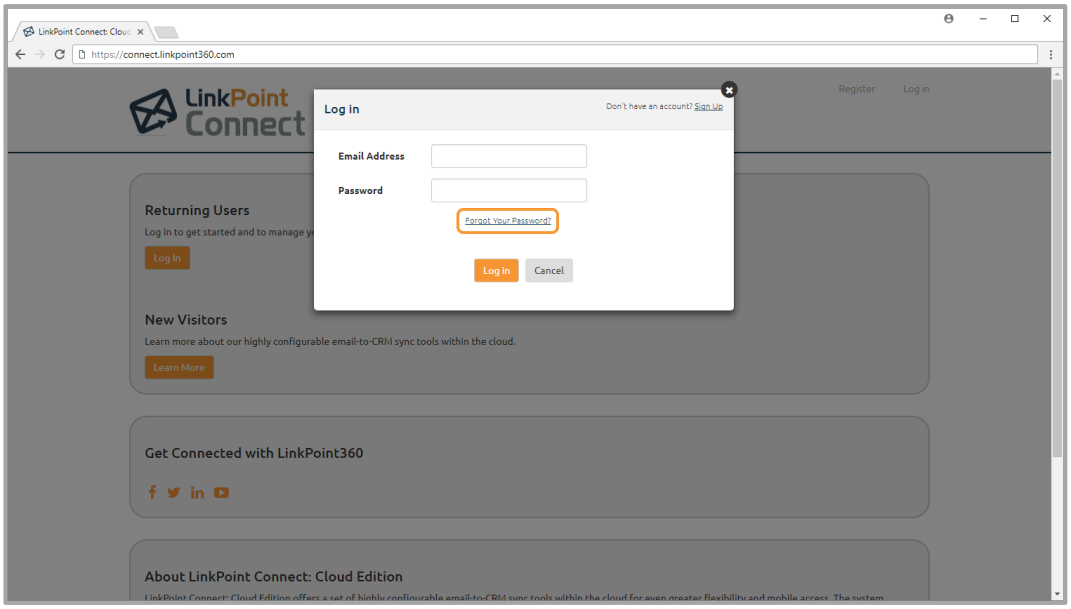
Resetting a Forgotten Password

Cloud Edition is a web-based Software-as-a-Service (SaaS) application that can be accessed easily via any web browser. In this section, you will learn how to reset the password for your Cloud Edition account.

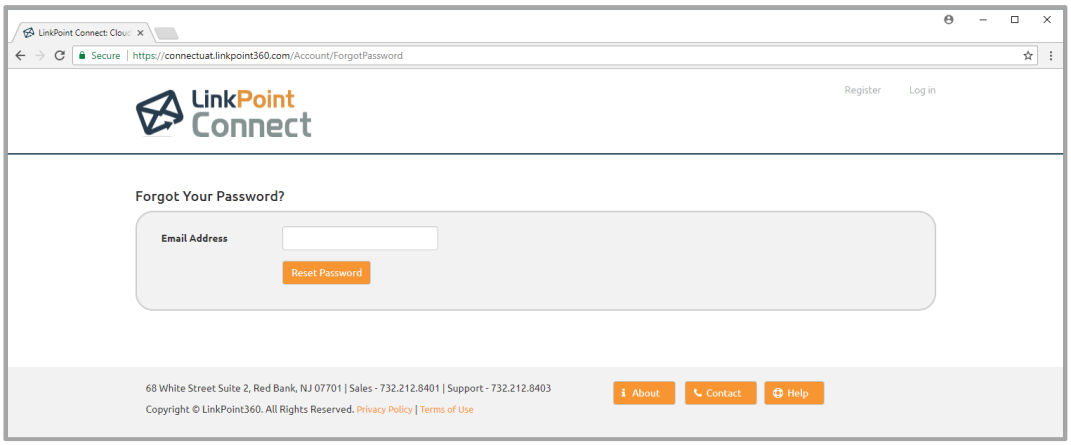
1 Visit https://connect.linkpoint360.com, and select the **Log in** link in the top right of the screen.



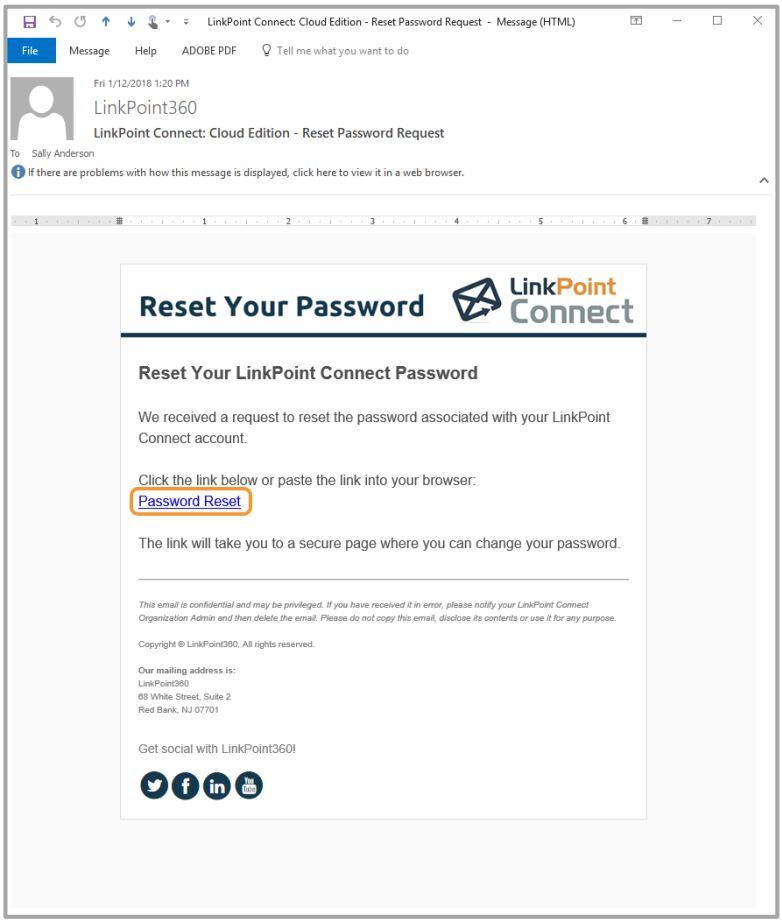
2 Select the **Forgot Your Password?** link.



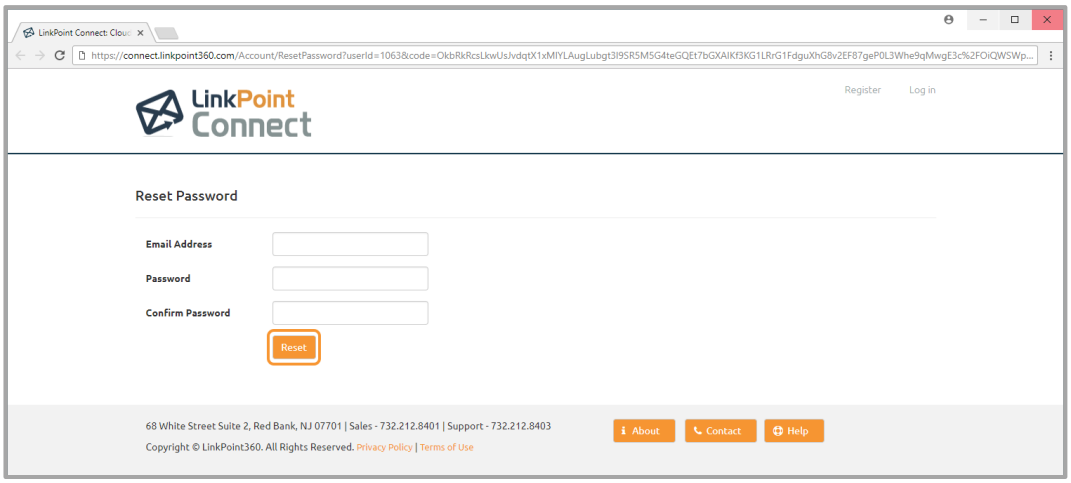
3 Enter your **Email Address**, and click the **Reset Password** button.



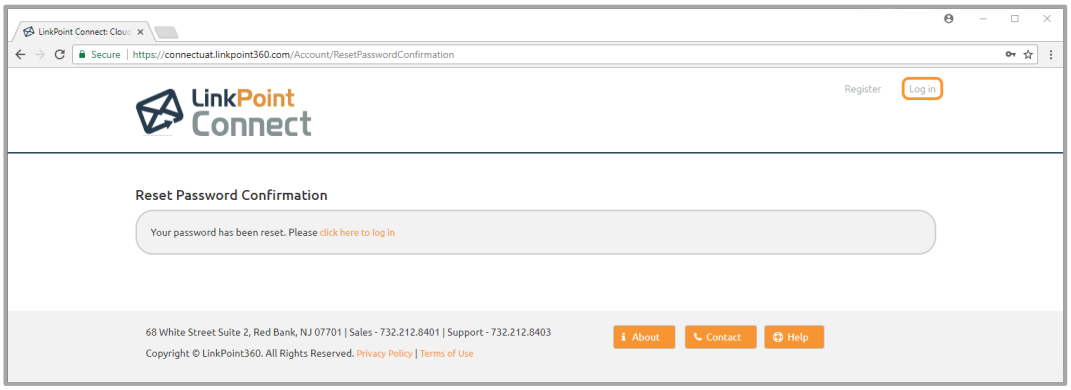
4 Check your email for a message with the subject line **LinkPoint Connect: Cloud Edition - Reset Password Request**, and select the **Password Reset** link.



5 Enter the corresponding information in the **Email Address**, **Password**, and **Confirm Password** fields and click the **Reset** button.



6 Log in to Cloud Edition using the new password.

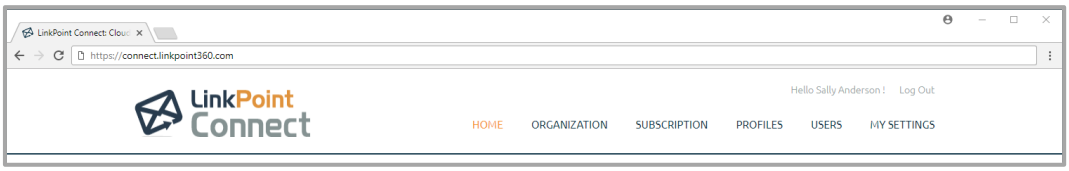


Changing User Settings

Reviewing User Details

Cloud Edition users can log in and review their User Details and edit specific fields, depending on the restrictions set by the Admin. Admins can also access and review User records and update this information on behalf of the user. In this section, you will learn how to review User Details.

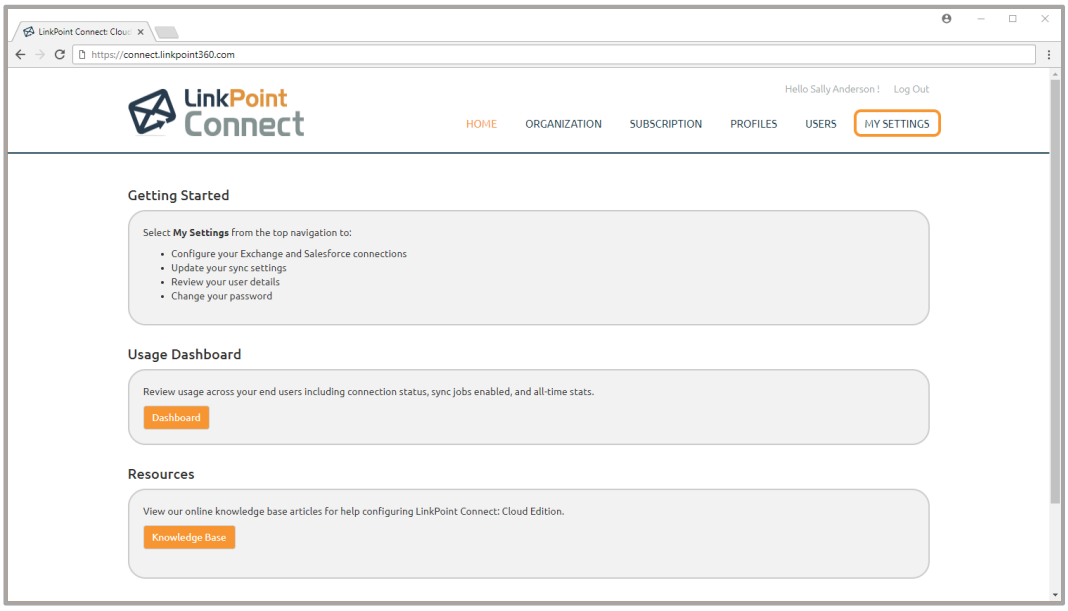
Warning: Admin users will see multiple navigation options within Cloud Edition. Standard End Users will only have access to the Home and My Settings options. The images in this User Guide demonstrate an Admin view of the navigation.



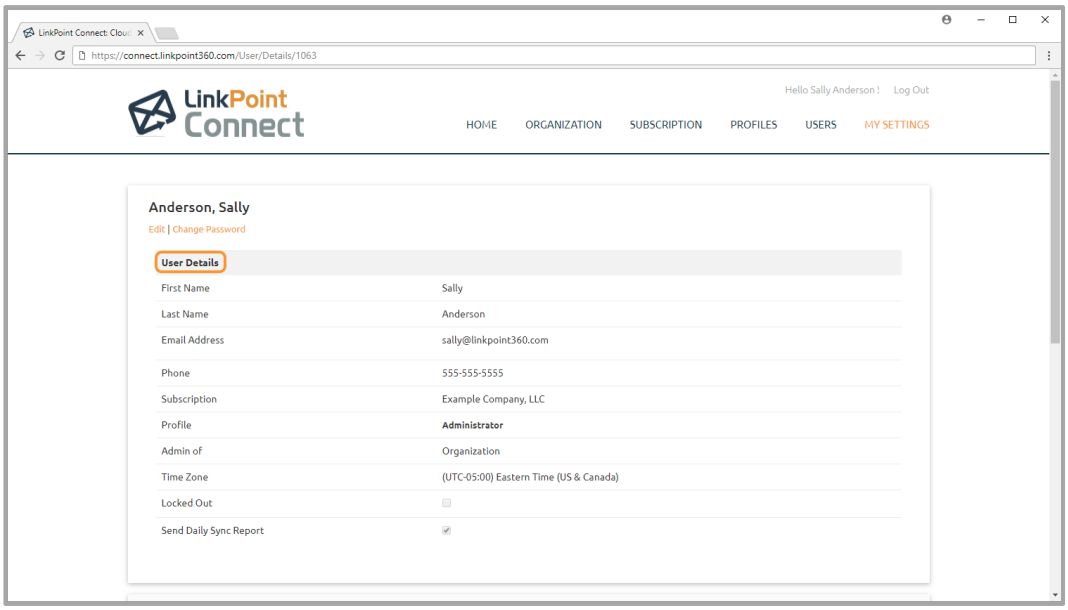
Admin Navigation

Standard User Navigation

1. Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.



2 Review the **User Details** information in the first section of the page.



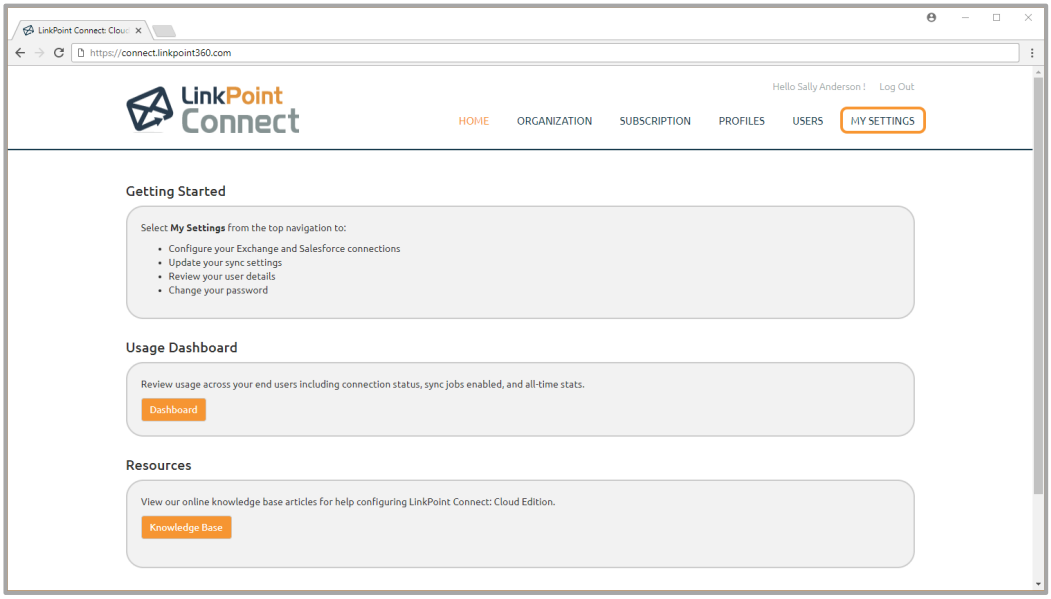
- **First Name and Last Name:** These fields are prepopulated with information provided during the registration process or when the Admin imports a user to the Cloud Edition account.
- **Email Address:** The email address used to log into Cloud Edition and to receive system notifications.
- **Phone:** The contact number provided during the registration process.
- **Subscription:** The user's assigned grouping to manage billing and higher-level sync settings and access.
- **Profile:** The user's assigned grouping that the user is assigned to in order to manage sync settings and access levels.
- **Admin of:** The highest level of the Organization for which the user is an Admin. If the user is not an Admin, the field will be left blank. This setting is managed by the Cloud Edition Admin.
- **Time Zone:** The time zone selected for the Cloud Edition account. This setting is used to manage when the sync operations are run for that particular user.
- **Locked Out:** This setting indicates whether the user has been locked out of Cloud Edition.
- **Send Daily Sync Report:** Enable to email the user a Sync Report including Sync History details.

Warning: The best practice for syncing with Cloud Edition is for all time zones to match between LinkPoint Connect, Exchange, and Salesforce. Cloud Edition will indicate if the time zones differ. While data will sync despite mismatched time zones, users should be advised that items will display in each system with different times, which can cause confusion when reviewing content.

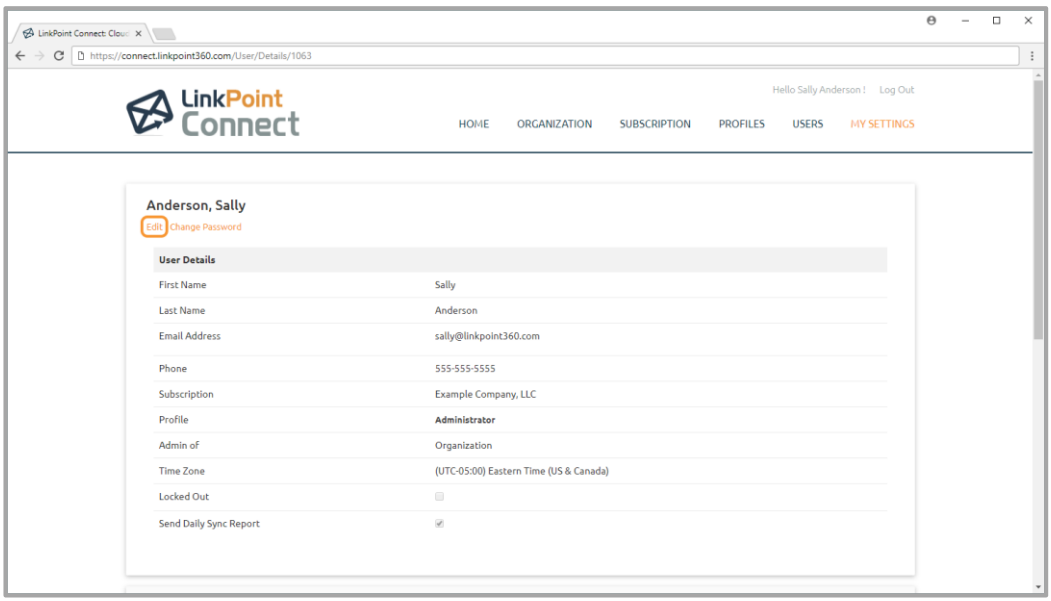
Editing User Details

Cloud Edition users can log in and review their User Details and edit specific fields, depending on the restrictions set by the Admin. Admins can also access and review user records and update this information on behalf of the user. In this section, you will learn how to edit your User Details.

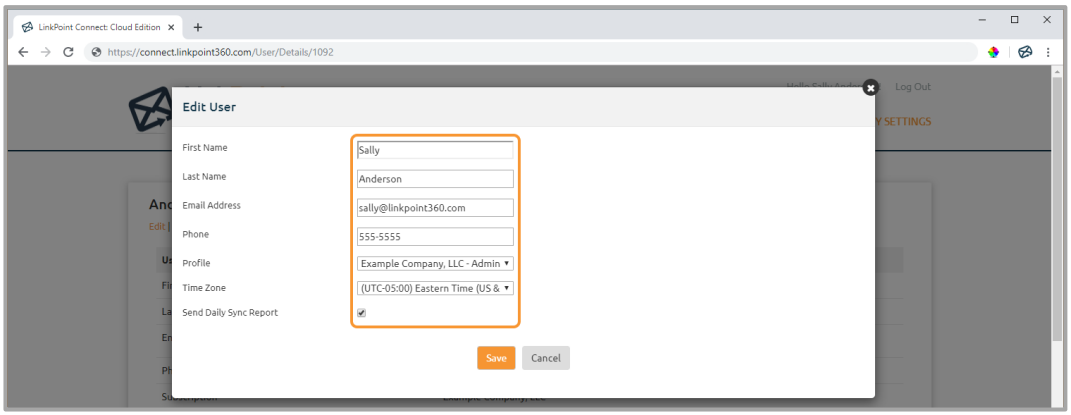
1 Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.



2 Select the **Edit** link at the top of the User Details section.

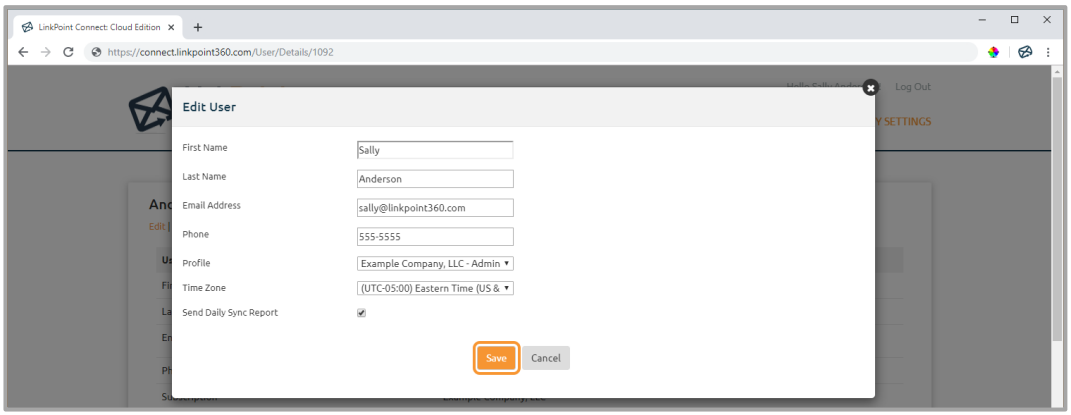


3 Edit the necessary fields within the **Edit User** window.



Tip: Note that some fields may be preset and locked by an Admin. These will be visible to users but are grayed out and cannot be edited.

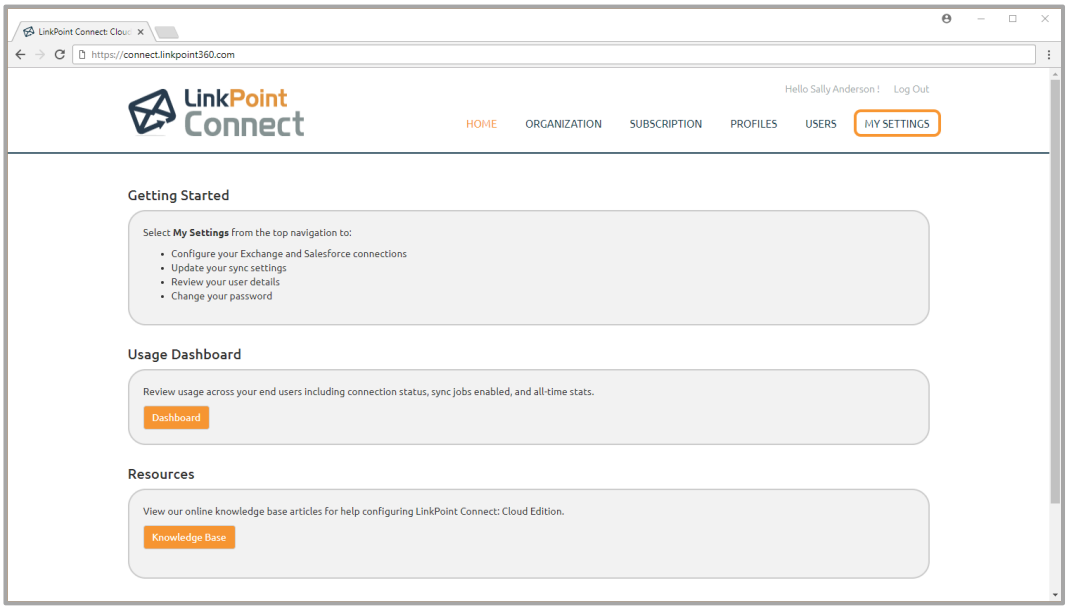
4 Click the **Save** button when finished and click **Close** to exit the Edit screen.



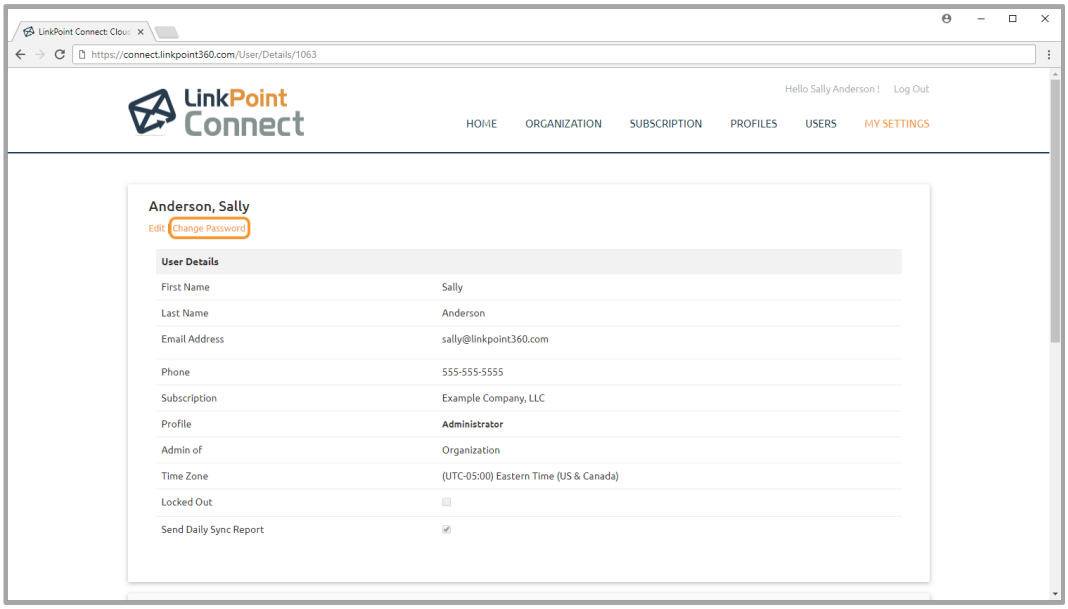
Changing User Passwords

Cloud Edition users can update or change their log in details with the Change Password screen. In this section, you will learn how to change your password.

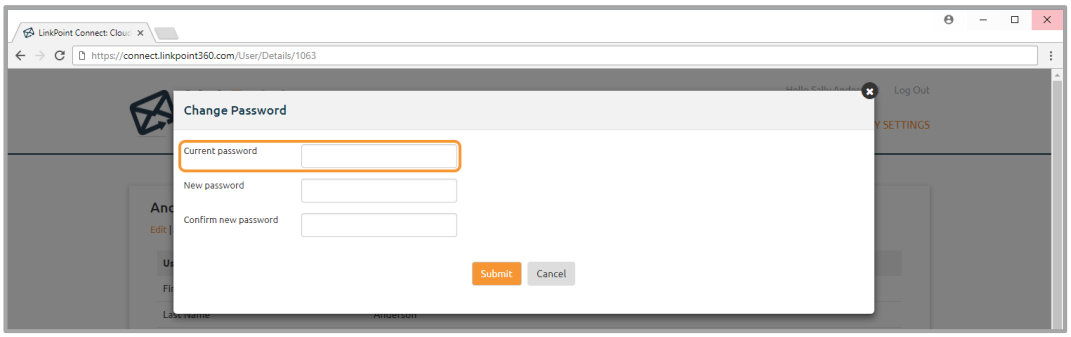
1 Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.



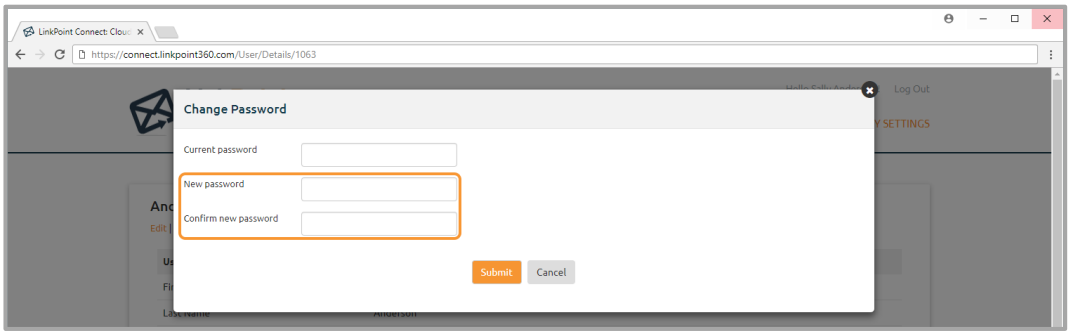
2 Select the **Change Password** link at the top of the User Details section.



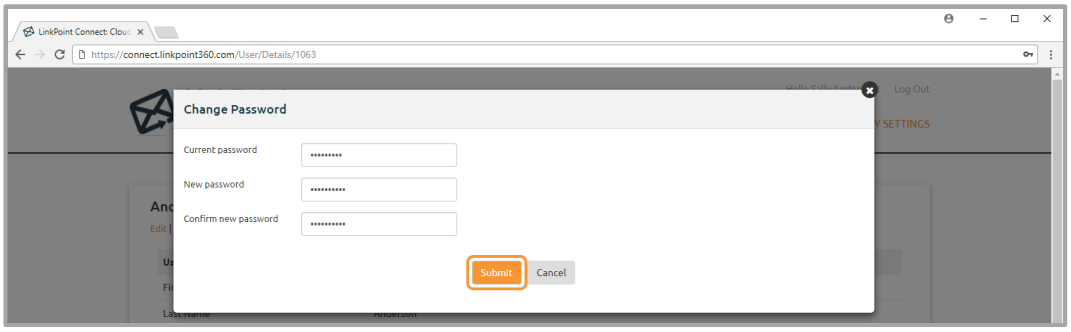
3 Enter the **Current Password** in the corresponding field.



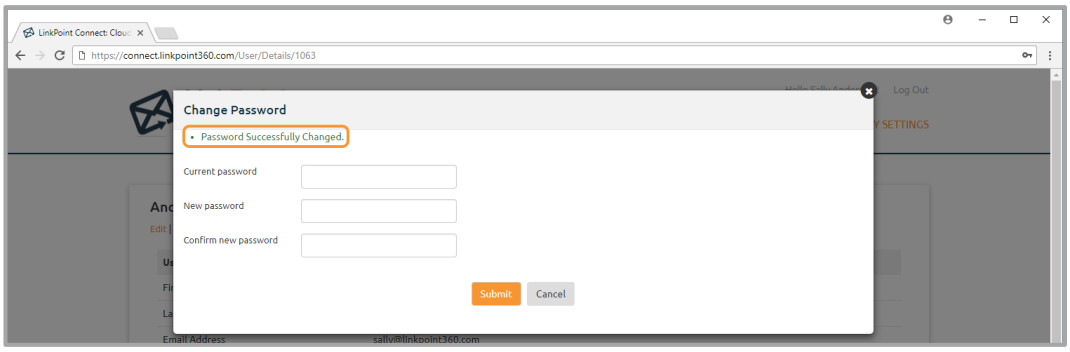
4 Enter the new password in both the **New password** and **Confirm new password** fields.



5 Click the **Submit** button.



6 Note that the message **Password Successfully Changed** is displayed in the window once the process is complete. Click the **X** in the top right corner to close the window.



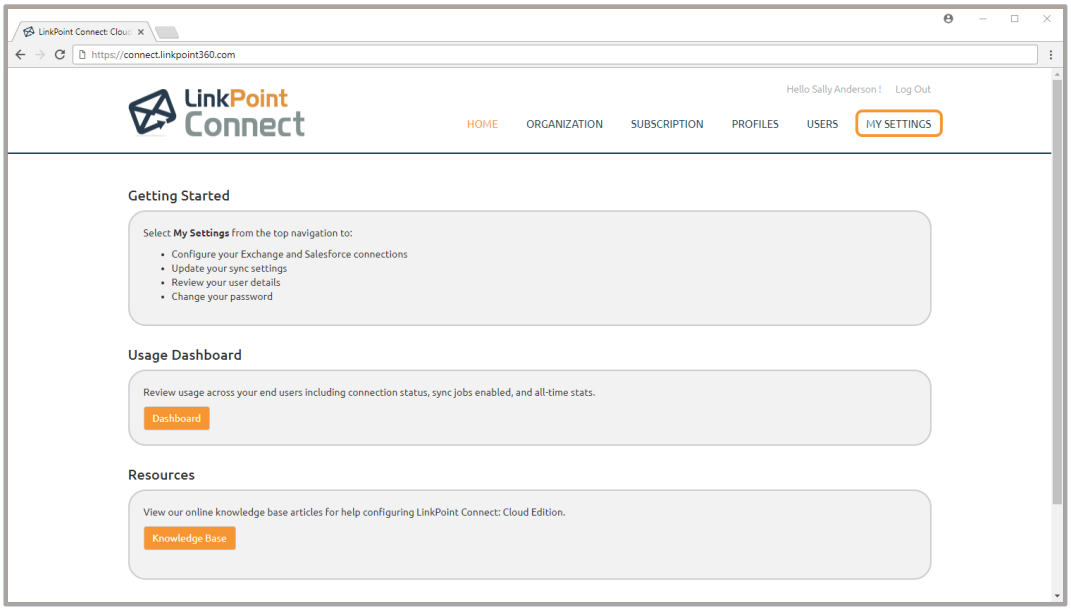
Connecting Hosts

Connecting Cloud Edition to Salesforce

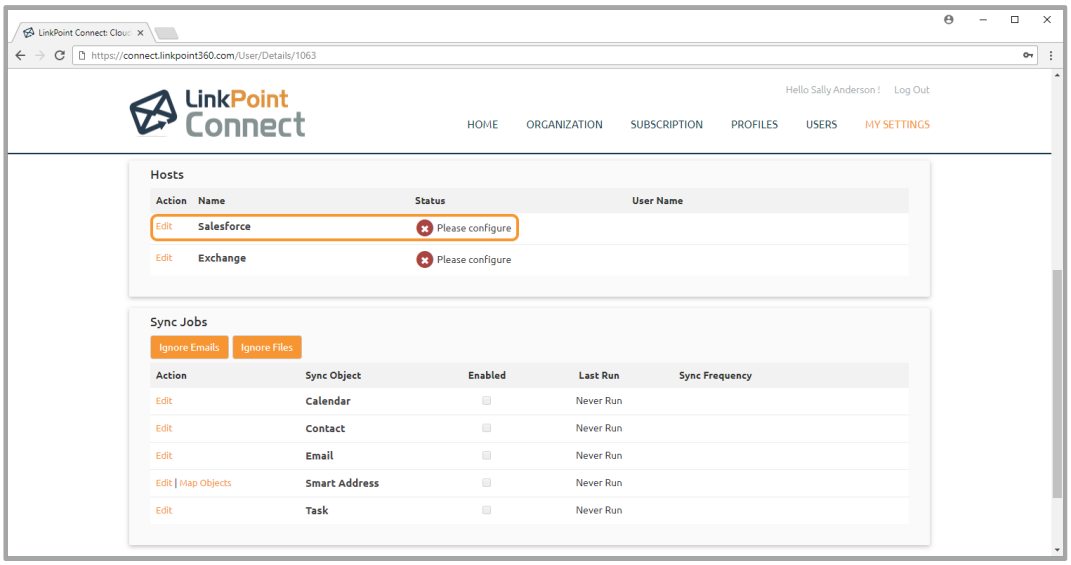
Cloud Edition users connect to their Salesforce account to enable syncing between Salesforce and Exchange. Users are prompted to connect to Salesforce during the initial set up process. However, in some cases, this step is bypassed or users need to reconnect at a later date. In this section, you will learn how to connect your Salesforce account.

Tip: A Cloud Edition **Host** is any external system that contains data that can be synced to another external system. These systems host the original data and receive new content via Cloud Edition.

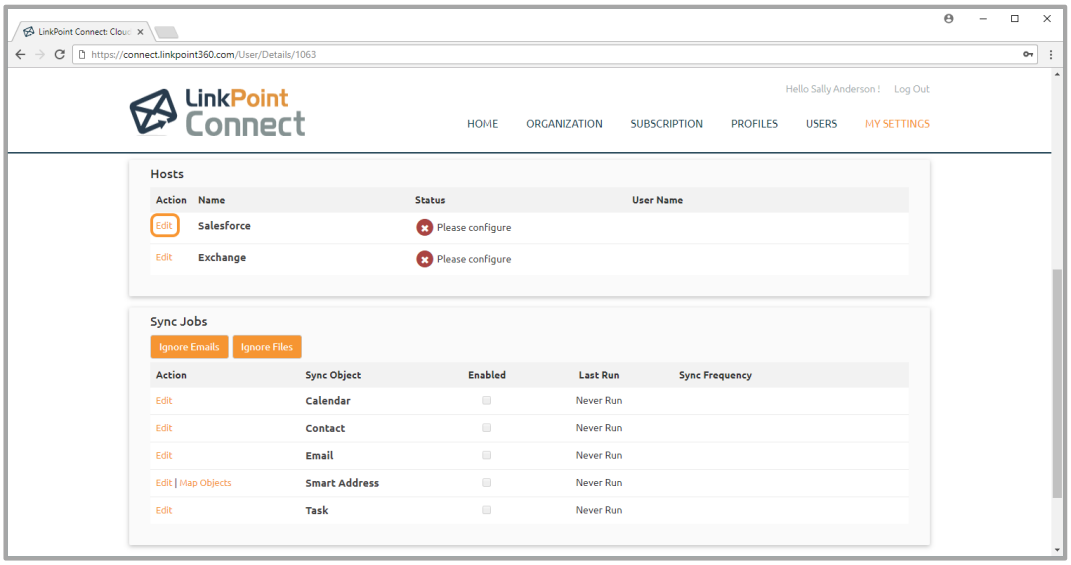
1. Log in to Cloud Edition and select the **My Settings** option in the top right corner of the screen.



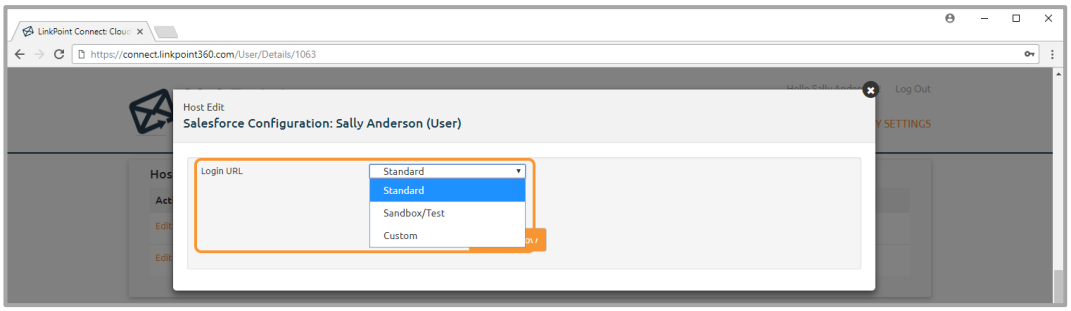
2 Locate the **Hosts** section and note the status of the Salesforce connection. The **red X** and **Please configure** status indicate that the user is not connected to Salesforce.



3 Select the **Edit** link for the Salesforce Host to view the Salesforce connection options.



4 Select your Salesforce **Login URL** from the dropdown list. This will be the URL that you use to access Salesforce from the web browser.



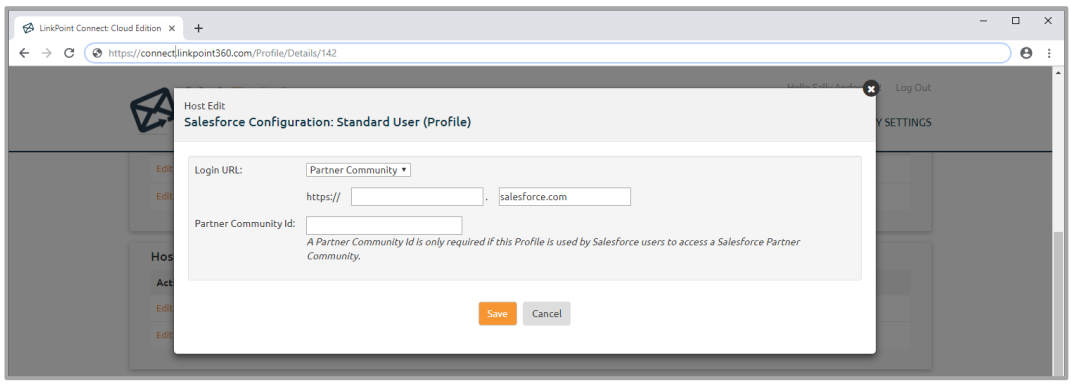
Tip: The default setting is *Standard*. You will want to use this option unless:

- You are testing with a Salesforce Sandbox or Test account. In this case, select *Sandbox/Test*.
- You are using a custom URL to access Salesforce defined by your organization. In this case, select *Custom* and enter the URL details.

If you are unsure which option to select, check with your internal Salesforce admin.

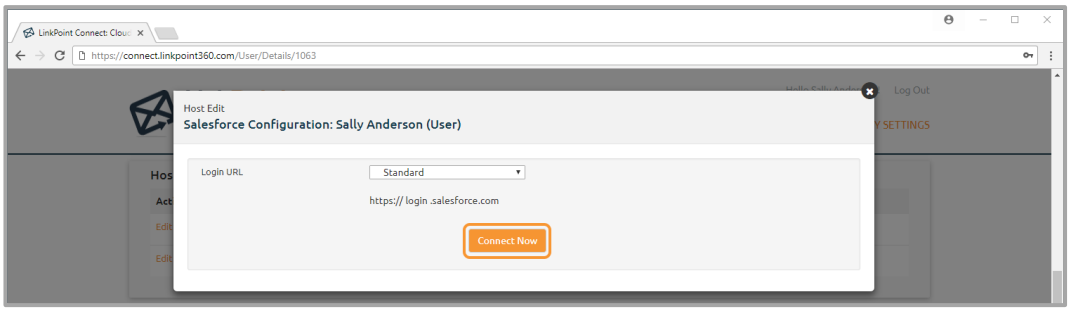
Warning: Customers with Salesforce Partner Community Users will need to configure the Salesforce Host at the Profile level within Cloud Edition.

1. Select **Profiles** from the top navigation.
2. Select the Profile **Name**.
3. Select the **Edit** link for the Salesforce Host.
4. Select **Partner Community** from the **Login URL** dropdown list.
5. Enter the **URL** and **Partner Community Id** and click **Save**.



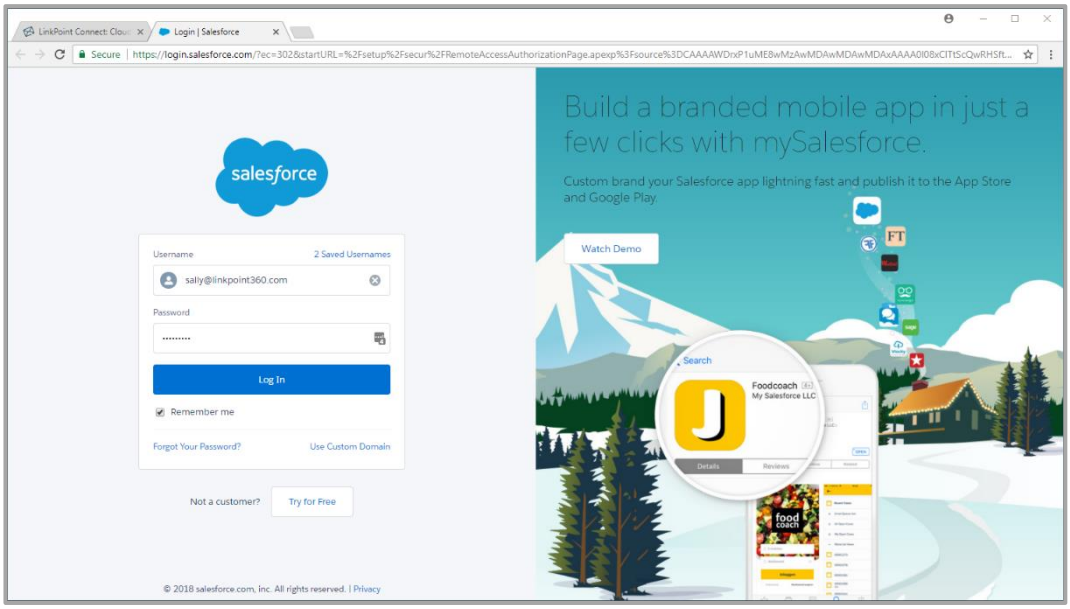
Additional Resources: Learn more about working with Salesforce Partner Communities in the **Configuring Profiles for Partner Community Users** section of this User Guide.

5 Click the **Connect Now** button to proceed.

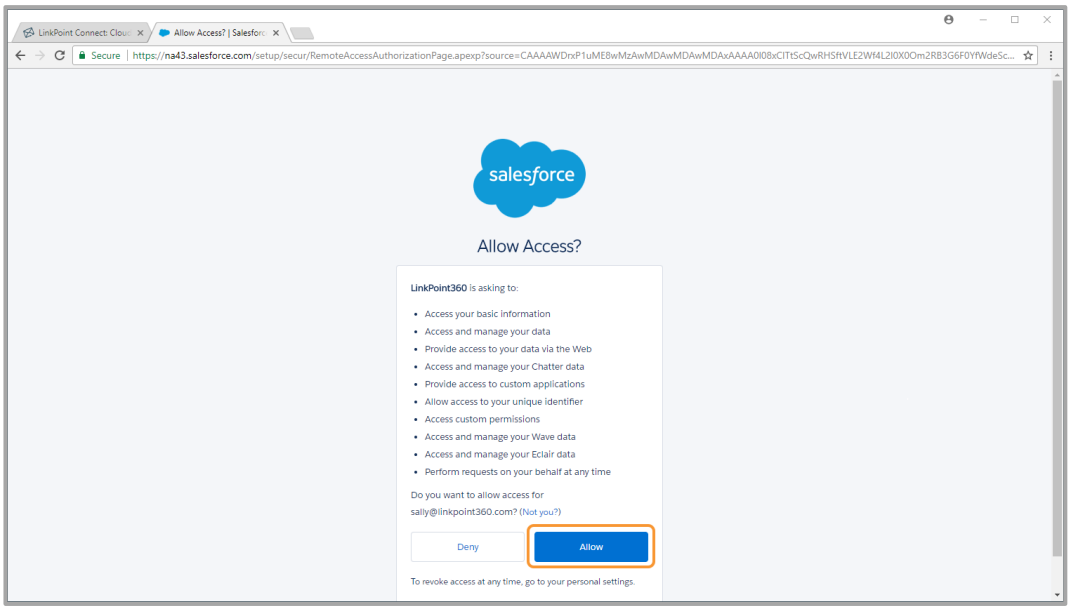


Tip: You may need to allow pop-up windows in your web browser from https://connect.linkpoint360.com.

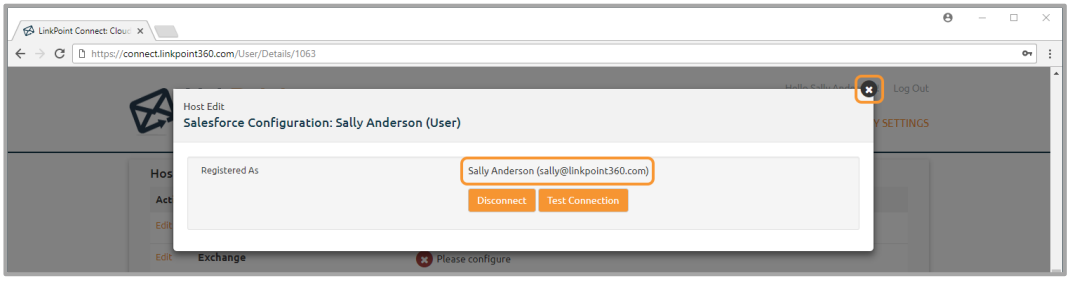
6 Enter your Salesforce credentials. This may automatically process if you are logged into Salesforce already. Otherwise, you will need to log in to Salesforce.



7 Click **Allow** to permit LinkPoint360 to access your Salesforce account.



8 Note that the Salesforce account is now connected. Click the **X** in the top right corner to close the window.



Tip: An email notification is sent to a user when one or both of their Hosts becomes disconnected. The email prompts the user to log into the web portal and enter their credentials to reestablish the connection and resume syncing.

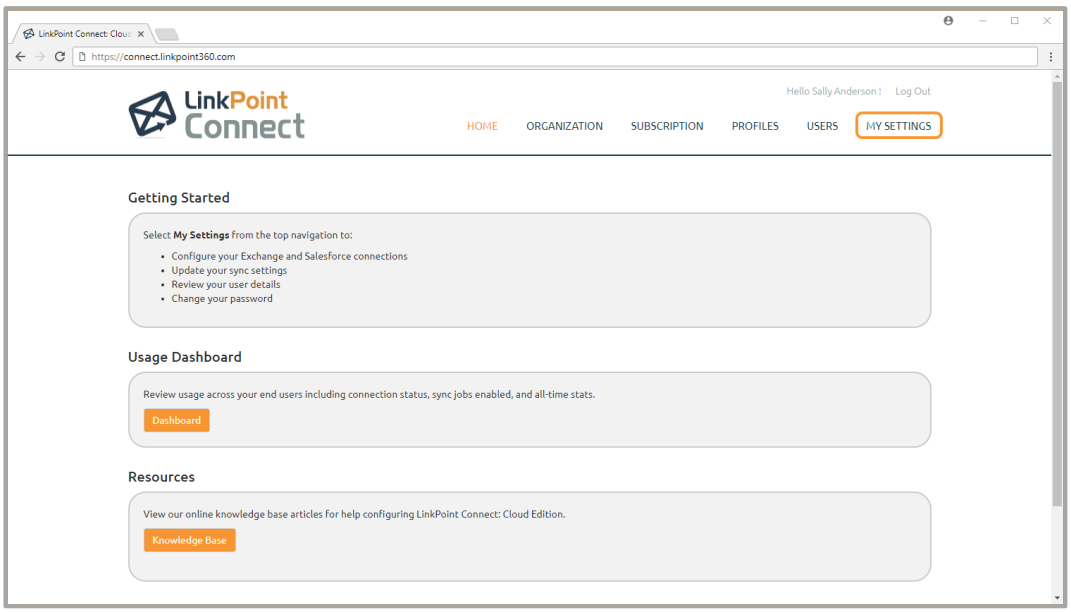
Tip: Admins can request that Host Disconnect emails also be forwarded to Admin users for a Cloud Edition Subscription. This feature adds the Admin as a Cc recipient on the email to the end user. This setting is off by default and can be enabled by LinkPoint360 Support on request.

Connecting Cloud Edition to Microsoft Exchange

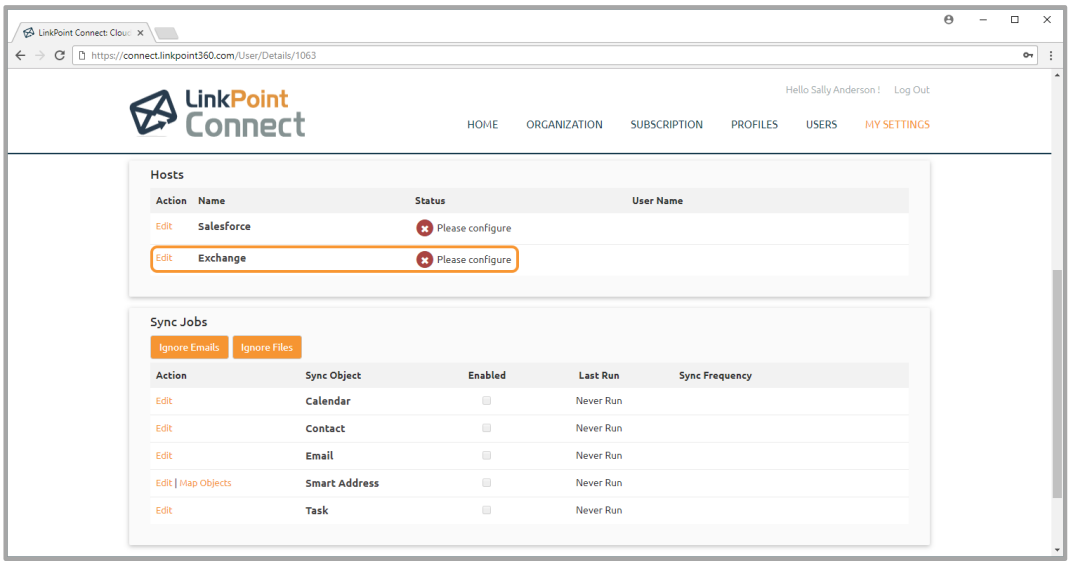
Cloud Edition users can connect to their Exchange account to enable syncing between Salesforce and Exchange. Users are prompted to connect to Exchange during the initial set up process (see: *Creating a Cloud Edition Account*). However, in some cases, this step is bypassed or users need to reconnect at a later date. In this section, you will learn how to connect your Exchange account.

Tip: A Cloud Edition **Host** is any external system that contains data that can be synced to another external system. These systems "host" the original data and receive new content via Cloud Edition.

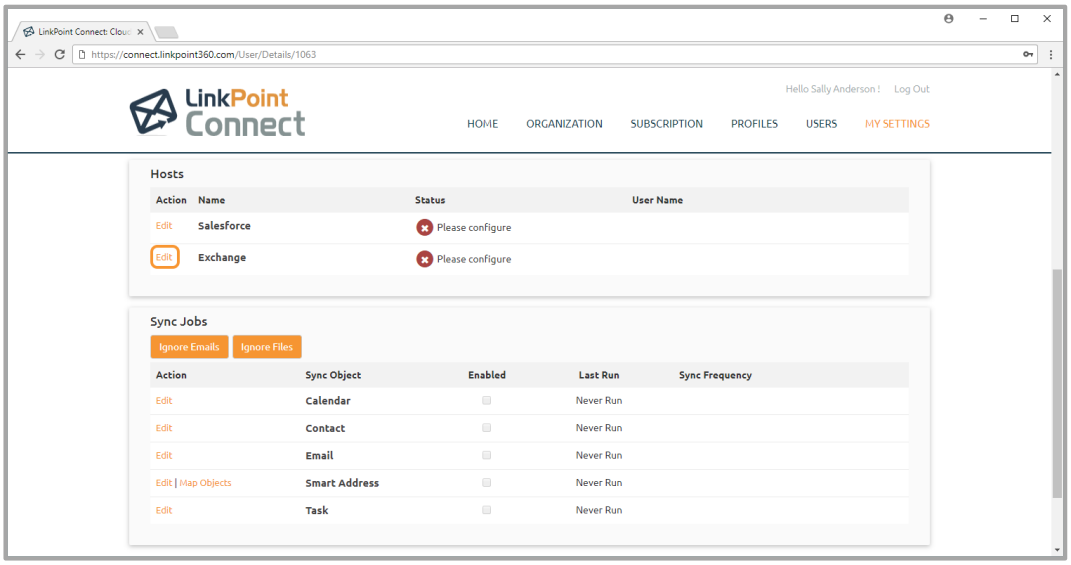
1. Log in to Cloud Edition and select the **My Settings** option in the top right corner of the screen.



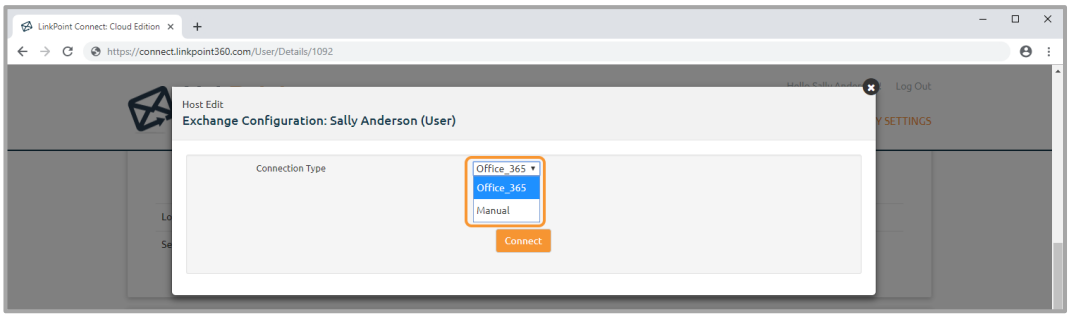
2 Locate the **Hosts** section and note the status of the Exchange connection. The **red X** and **Please configure** status indicate that the user account is not connected to Exchange.



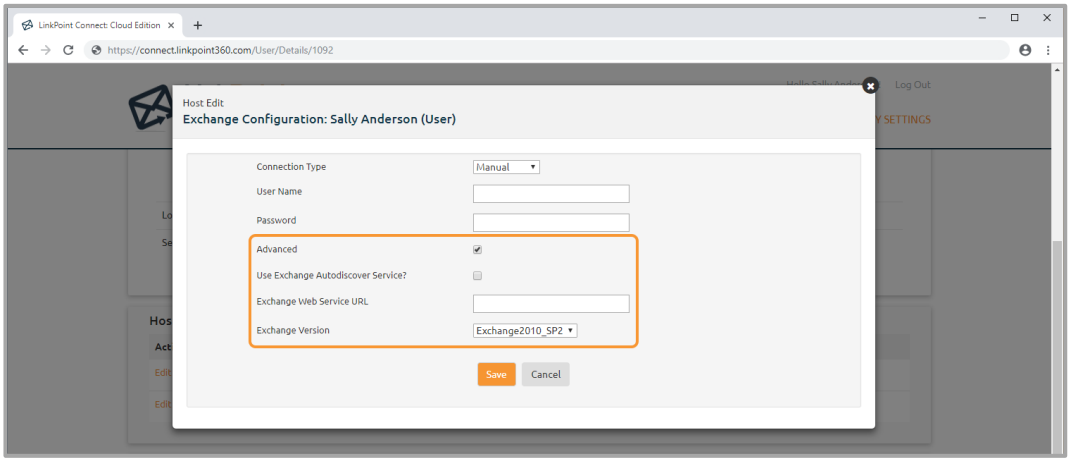
3 Select the **Edit** link for the Exchange Host to view the connection options.



4 Select a **Connection Type** from the drop-down list to connect to Exchange with Office 365 credentials through the web browser or to manually enter your User Name and Password for your Exchange account.

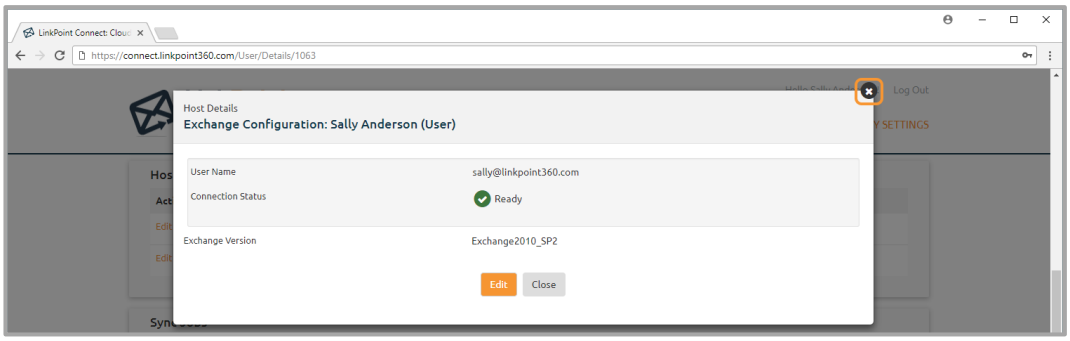


Tip: Some organizations configure their Exchange environments to block autodiscover connections. To troubleshoot, select the **Manual** option for **Connection Type**. Then select the **Advanced** checkbox and deselect the option to **Use Exchange Autodiscover Service?** Enter the **Exchange Web Service URL** and **Exchange Version** for your environment. This should be provided to you by your internal IT Admin.



Warning: The Exchange Connection Type selected by the Admin when first creating a Cloud Edition account is set as the default value for all subsequent users. If an Admin changes their Exchange Connection Type at the User level at a later time, existing users will retain the original setting but all subsequent users will inherit the new selection as their default value.

5 Note that the Exchange account is now connected. Click the X in the top right corner to close the window.



Tip: An email notification is sent to a user when one or both of their Hosts becomes disconnected. The email prompts the user to log into the web portal and enter their credentials to reestablish the connection and resume syncing.

Tip: Both the Username and Password fields for the Exchange Host are cleared after a user disconnects. Users must reenter both values in order to establish a connection with Exchange.

Tip: Admins can request that Host Disconnect emails also be forwarded to Admin users for a Cloud Edition Subscription. This feature adds the Admin as a Cc recipient on the email to the end user. This setting is off by default and can be enabled by LinkPoint360 Support on request.

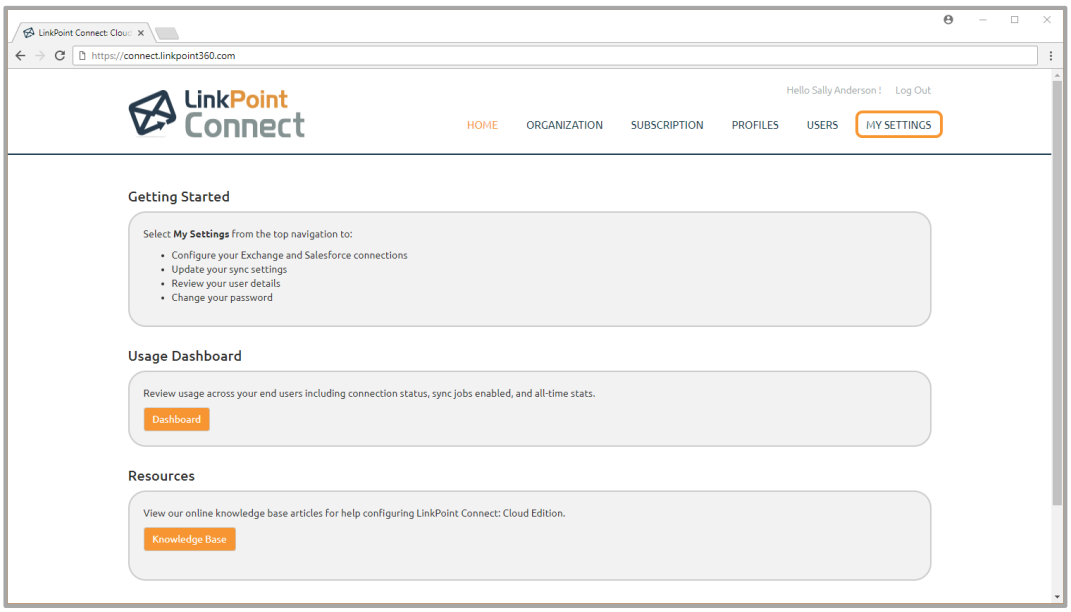
Syncing Calendar Items

Configuring Calendar Sync Jobs

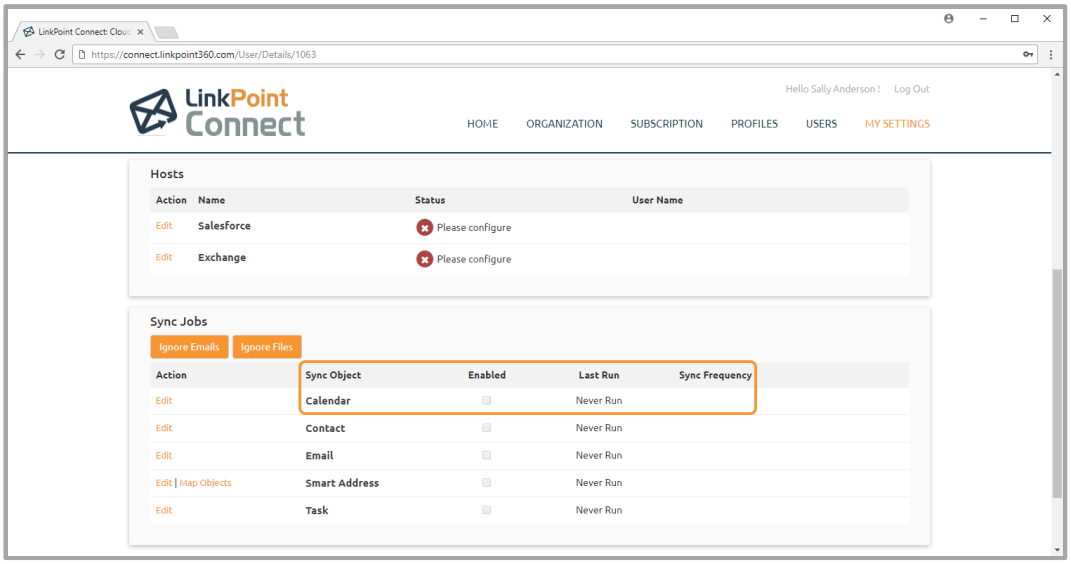
Cloud Edition includes a variety of flexible synchronization settings for managing the flow of data between Microsoft Exchange and Salesforce calendars. Before enabling Calendar Sync, it is important for users to become familiar with the available Cloud Edition sync settings. The synchronization of emails, calendars, contacts, and tasks works similarly but can be managed separately based on user preference. In this section, you will learn how to access and alter the calendar sync settings available with Cloud Edition.

Tip: Cloud Edition Admins have the ability to set default sync settings and/or lock down these settings to prevent end user override. Your instance of Cloud Edition may not allow you to change any/all of the settings described in this section, depending on how your Admin has configured your access. Settings that are preset and locked by an Admin are visible to end users but are grayed out and cannot be edited.

1. Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.

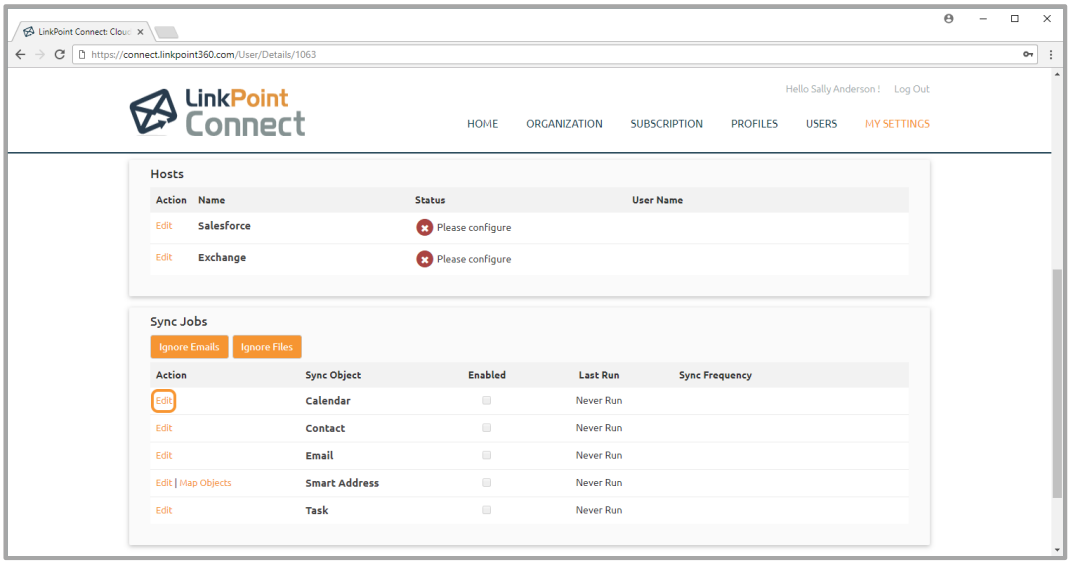


2 Locate the **Sync Jobs** section and note the information displayed for the **Calendar Sync Object**. At a glance, users can see whether the Calendar Sync is **Enabled**, when the sync was **Last Run**, and the configured **Sync Frequency**.



Tip: The first time you set up your Calendar Sync, the **Enabled** checkbox will be deselected, the **Last Run** date and time will be listed as **Never Run**, and the **Sync Frequency** will be blank.

3 Select the **Edit** link for the **Calendar Sync Object** to view the available sync options.

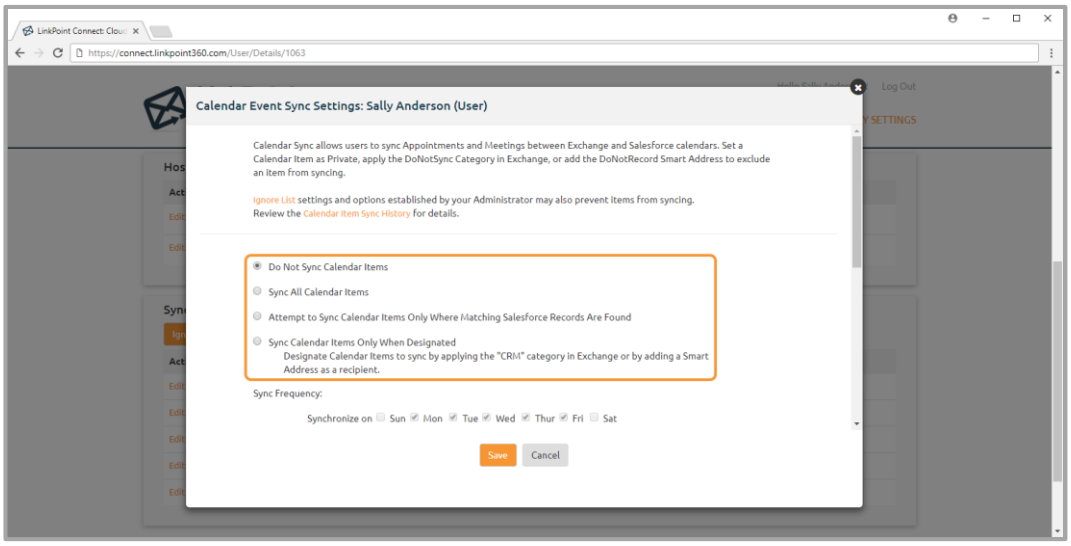


Tip: To review the sync settings without making changes, you can select **Calendar** to open the Calendar Event Sync Settings window. This will show all of the settings as read only. You can click the **Edit** button to make changes to the settings if needed.

4

Select a sync option to enable Calendar Sync. Note that there are four modes to choose from based on how you would like the data to be handled.

- Do Not Sync Calendar Items:
  Disables Calendar Sync. Calendar sync is off by default for all new accounts and new users.
- Sync All Calendar Items:
  Enables Cloud Edition to sync all of the items on your calendar between systems.
- Attempt to Sync Calendar Items Only Where Matching Salesforce Records Are Found:
  Enables Cloud Edition to sync only items that are sent to or received from email addresses with matching Salesforce records. Note that all calendar items created in Salesforce will sync to Exchange.
- Sync Calendar Items Only When Designated:
  Enables Cloud Edition to sync only the items you opt into the sync. Designate Calendar Items to sync by applying a CRM Category in Exchange or by adding a Smart Address as a recipient. Note that all calendar items created in Salesforce will sync to Exchange regardless of designation.



Warning: If you enable Designate mode and run your sync, the items without a designation during the sync attempt will be excluded.

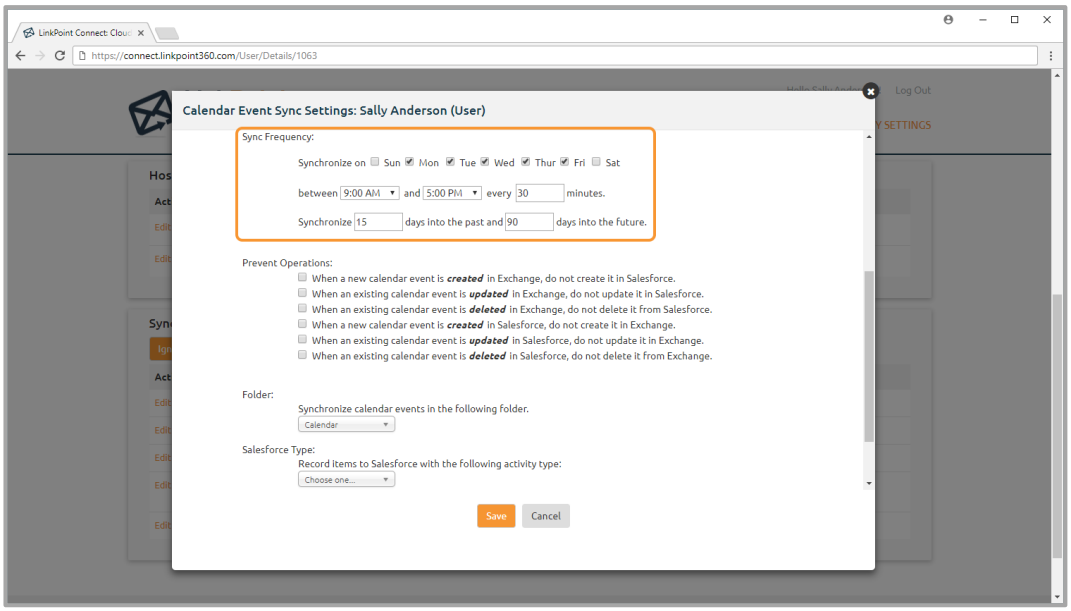
Tip: If an option other than **Do Not Sync Calendar Items** is already selected for you during your initial set up, your Admin may have preconfigured the setting. If you are not able to change the mode selection, your Admin may have locked down the setting.

Tip: There are several ways to exclude a Calendar Item from syncing in any of the available sync modes.

- Set an event to *Private* on the Exchange or Salesforce Calendar.
- Add an Exchange Category with the name *DoNotSync* to the event.
- Include the *DoNotRecord* Smart Address as a recipient/attendee for the event.

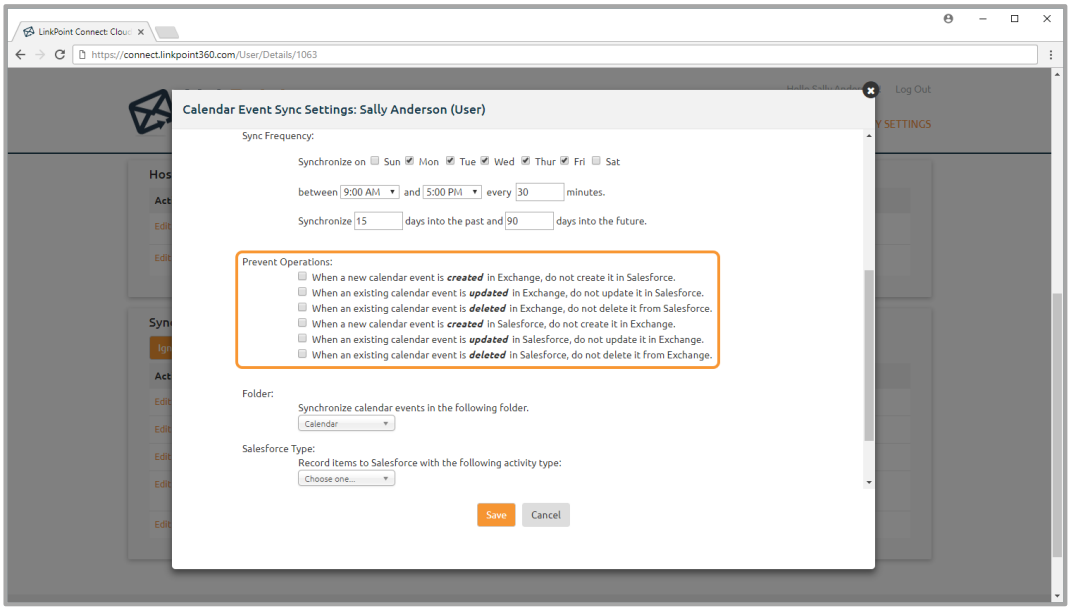
Additional Resources: Learn more about Smart Address in the **Configuring Smart Address Sync** section of this User Guide.

5 Enter the preferred **Sync Frequency** in the provided fields. Select the day and time range during which you want the sync to run. Note that these times will be based on the time zone you set for your user account.



Tip: The maximum sync frequency cannot exceed 30 minutes. Users cannot sync more than 30 days of past events or more than 365 days of future events.

6 Set your **Prevent Operations** preferences. Indicate whether Cloud Edition should create, update, or delete items in Salesforce or Exchange for new and existing events.

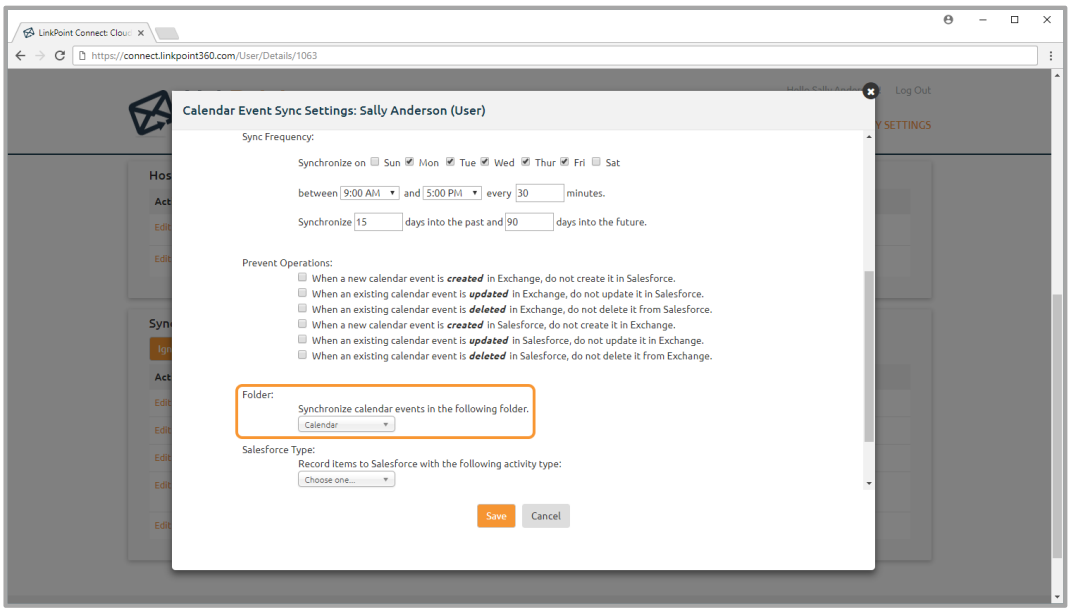


Tip: Users can prevent Cloud Edition from creating, updating, or deleting items regardless of any Salesforce settings. Users can set this individually for Salesforce and Exchange, effectively creating bidirectional or one-way sync rules.

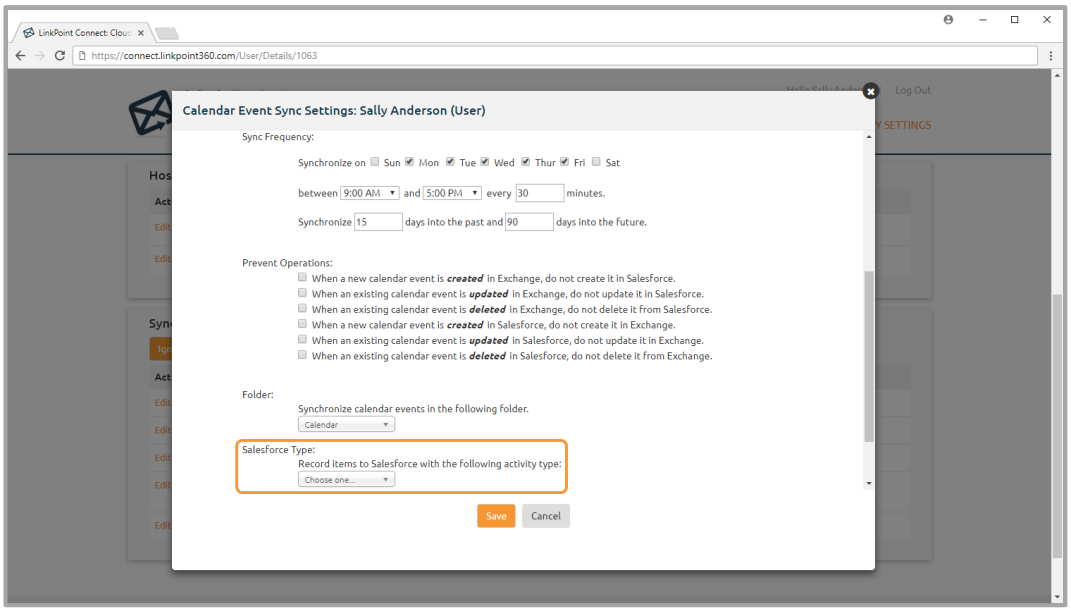
Warning: Prevent Operations settings override any selections you make for CRM category or included Smart Addresses. For example, choosing prevent a calendar item from being created in Salesforce and then tagging that item with a CRM category in Exchange will result in the item not syncing to Salesforce.

Tip: If you enable a Prevent Operations option and run your sync, the items included in the sync attempt will be excluded moving forward.

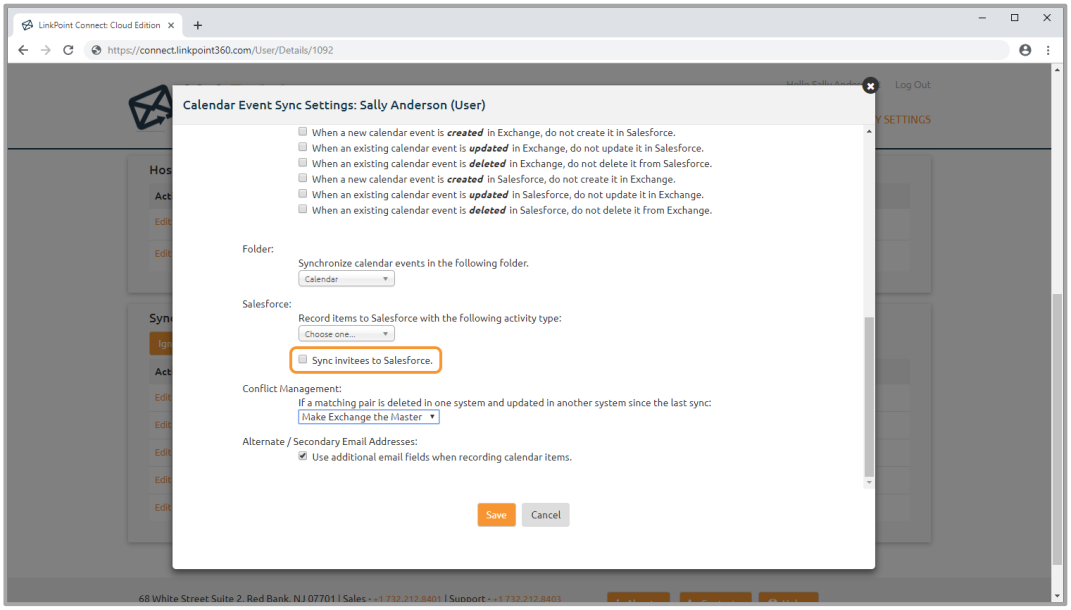
7 Change the **Folder** to map the sync to a different Exchange calendar. The default selection will be your main calendar.



8 Choose a **Salesforce Type** to sync the Calendar Item to Salesforce with a default Event Type. If no selection is made, the system will use the Salesforce default.

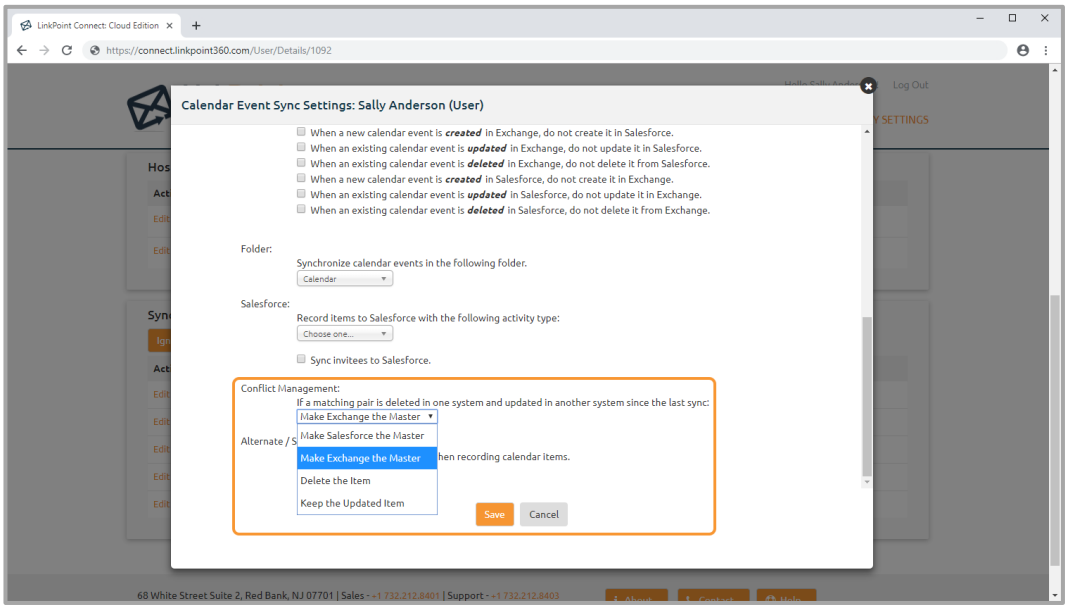


9 Select the **Sync Invitees to Salesforce** option to sync recipients on Outlook meetings to the Invitee fields in Salesforce.



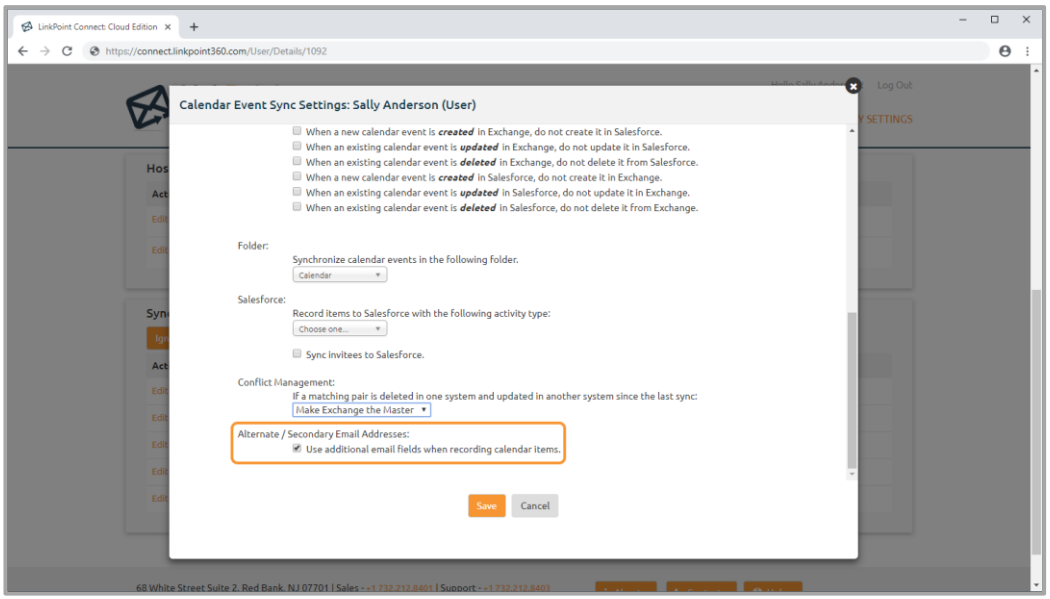
10 Set the **Conflict Management** rule for when an item is deleted in one system but updated in another system since the last sync.

- **Make Salesforce the Master:** The action that occurred in Salesforce applies to the Exchange version of the item.
  - For example, if the item is deleted in Exchange and updated in Salesforce, the item will be updated in both systems (not deleted).
- **Make Exchange the Master:** The action that occurred in Exchange applies to the Salesforce version of the item.
  - For example, if the item is deleted in Salesforce and updated in Exchange, the item will be updated in both systems (not deleted).
- **Delete the Item:** If the item is deleted in one system, it will be deleted from the other as well.
  - For example, if the item is deleted in Exchange and updated in Salesforce, the item will be deleted in both systems (not updated).
- **Keep the Updated Item:** If the item is updated in one system, it will be updated in the other as well.
  - For example, if the item is updated in Salesforce and deleted in Exchange, the item will be updated in both systems (not deleted).



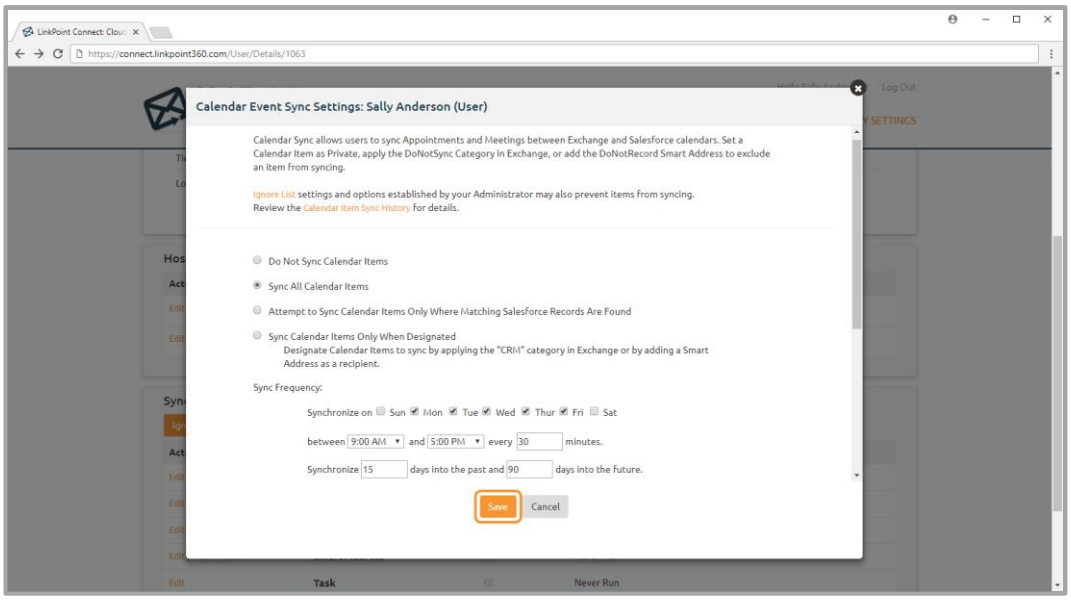
Warning: Prevent Operations settings override any selections you make for the Conflict Management rule. For example, choosing prevent a calendar item from being deleted in Exchange and then selecting the Conflict Management rule *Delete Wins* will result in the item not being deleted from Exchange.

11 Select or deselect the **Alternate/Secondary Email Addresses** checkbox to use additional fields when syncing calendar events.

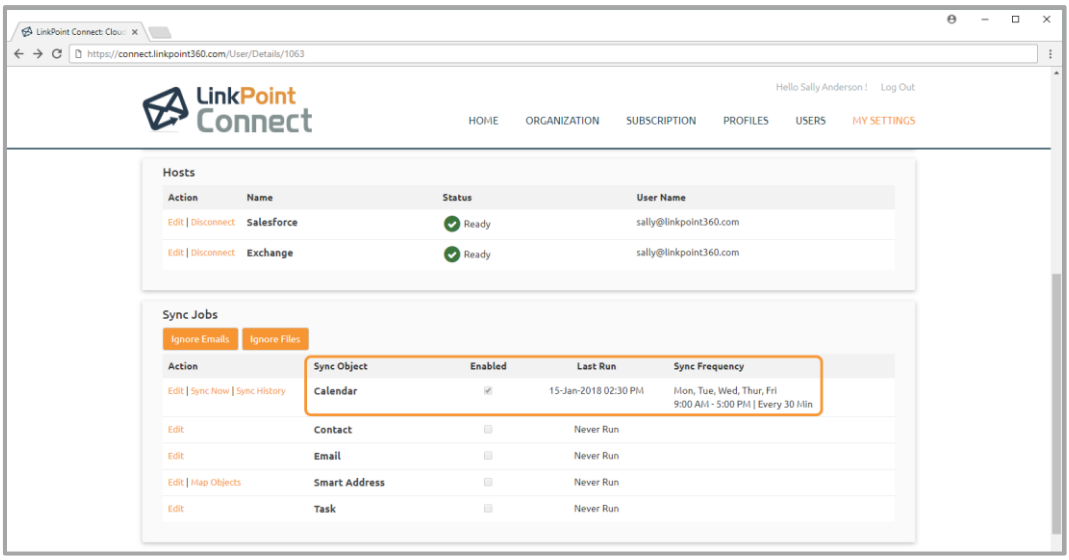


Tip: If you have multiple email address fields on Contact or Lead records, this option will allow for syncing based on all of the fields. This option is enabled by default.

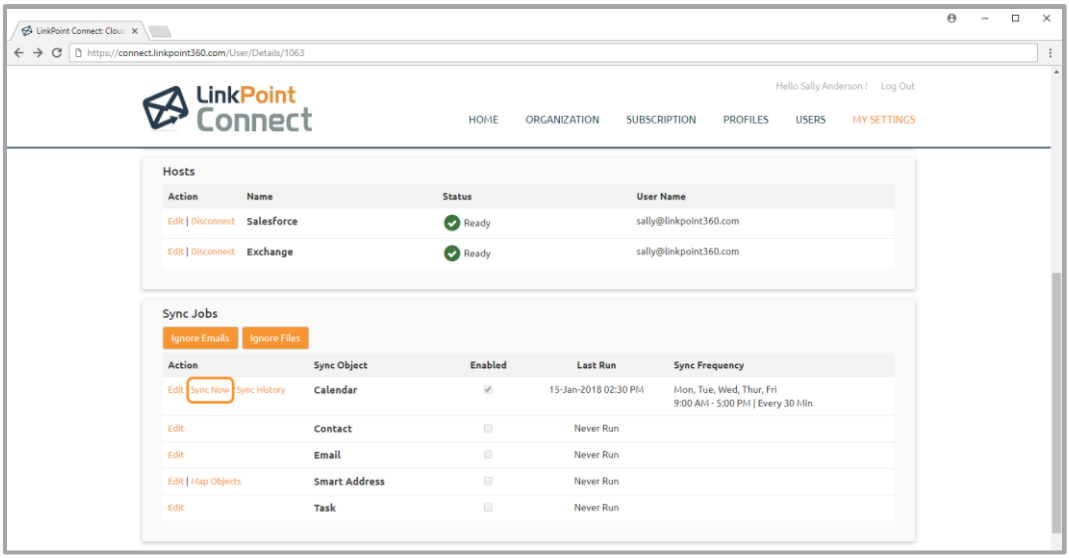
12 Click the **Save** button when finished. Then close the **Calendar Event Sync Settings** window.



13 The Calendar Sync will run immediately after it is enabled. The Sync Jobs will show the last run date and time and will reflect the Sync Frequency that was selected when editing the sync.



Tip: To run the Calendar Sync again, you can click the Sync Now option. This will place the Sync Job in the queue for processing. This does not mean that the sync immediately runs. The process can take several minutes depending on the amount of data that meets the sync criteria. To click Sync Now again, refresh the page.



Tip: Calendar items that sync to Salesforce using the option to *Sync Calendar Items Only When Designated* will be marked with a CRM category in Microsoft Outlook. This feature is not available for mobile users and does not apply to calendar items that sync using other sync modes.

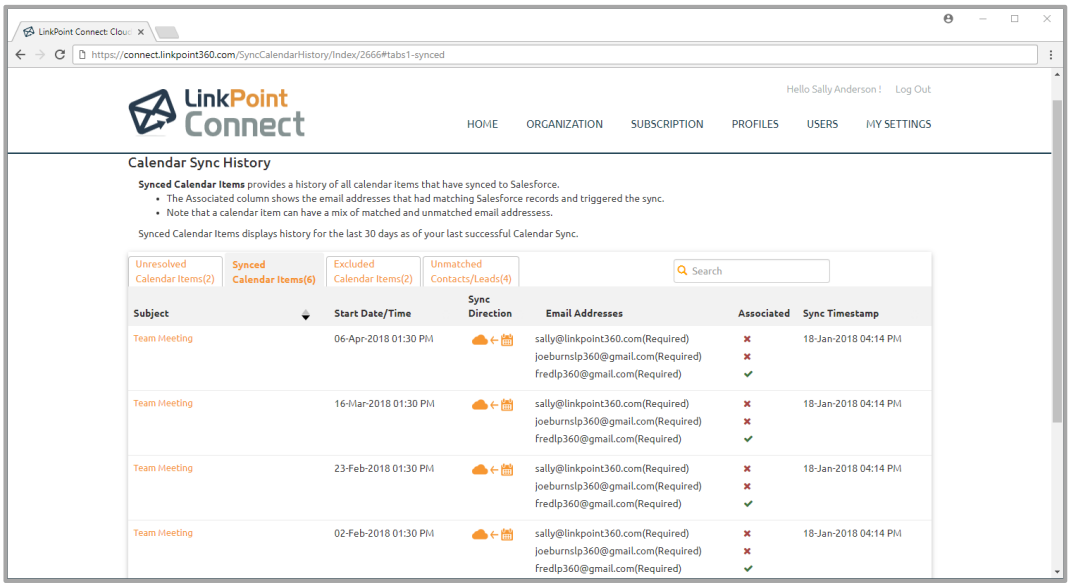
Warning: During the sync, all fields (excluding Body and Subject) that are created or updated in Salesforce are validated for maximum length requirements and truncated according to Salesforce limits. Items with Subjects that exceed the maximum length requirements in Salesforce will not sync. By default, calendar items with Body character counts that exceed the maximum length requirements in Salesforce will be truncated to fit in the space permitted.

Troubleshooting Calendar Sync Scenarios

Cloud Edition offers users the flexibility to customize how Calendar Sync moves data between Microsoft Exchange and Salesforce. When getting started, users may experience outcomes that do not match their expectations for the sync functionally. In this section, you will review some common scenarios to help with troubleshooting Calendar Sync and to guide you as you configure your settings.

Recurring Meetings

Calendar Sync will work with recurring meetings. However, each instance of the recurring calendar item will sync as a separate meeting, rather than handling the recurring meeting as a single item. This will not affect how the calendar item appears in Exchange or Salesforce. However, users may see multiple instances of a recurring meeting listed in the Calendar Sync History screens when reviewing Unresolved Events or Synced Events.



Additional Resources: Learn more about Sync History in the **Reviewing Calendar Sync History Details** section of this User Guide for more information.

Leads and Calendar Sync

Cloud Edition supports syncing items sent or received from Salesforce Lead records. However, Salesforce limits items to sync only to a single Lead Record. A calendar item sent to a single lead can sync to the matching Salesforce Lead Record. However, a calendar item sent to two or more leads can sync only to a single Salesforce Lead Record. In these instances, Cloud Edition will sync the item to the first Lead Record match listed in the To or From field (depending on whether the item is inbound or outbound).

There are also Salesforce limitations when working with a mix of Lead and Contact Records. A calendar item sent to multiple Contacts and Leads with matching Salesforce Records will sync to the matching Contact Records. The item will not sync to the Lead Record(s) since Salesforce prevents working with a mix of Contacts and Leads. Cloud Edition gives priority to the Contact Records in the To or From fields (depending on whether the item is inbound or outbound).

Appointments

Calendar items that you create with no invitees are considered Appointments (as opposed to Meetings which have invitees). All Appointments created in Salesforce will sync to Exchange regardless of sync mode. However, Appointments behave differently when created in Exchange.

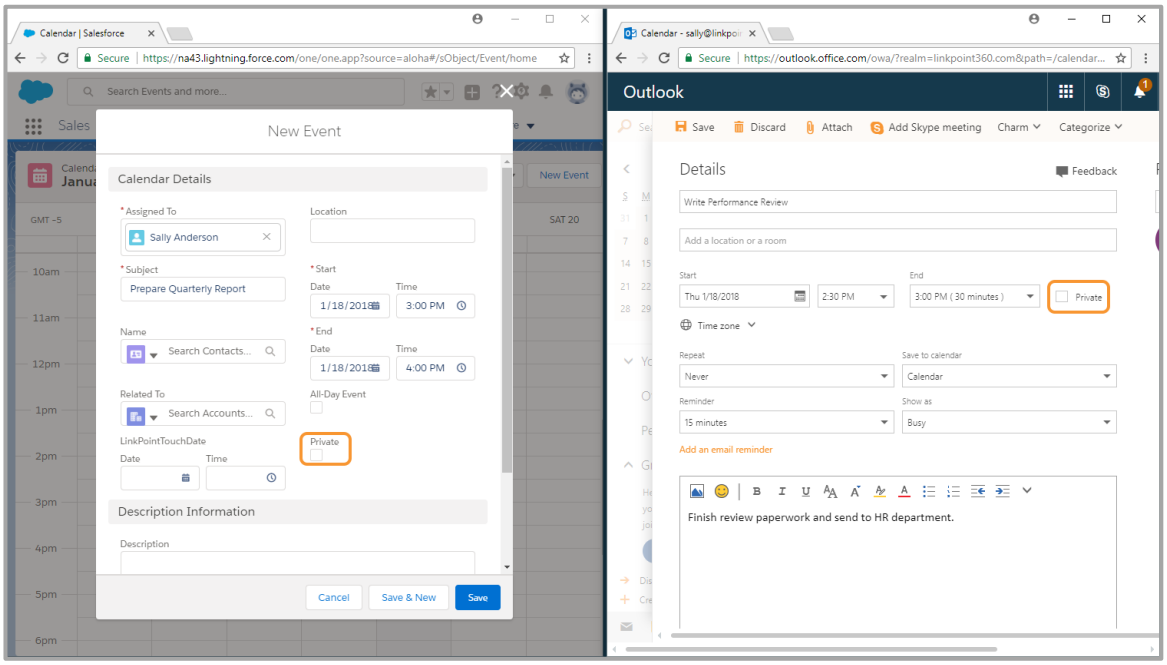
If you want Appointments to sync to Salesforce from Exchange, ensure that your own email address and/or domain are not included in the Ignore List (this setting is off by default). Appointments include your own email address behind the scenes as the only related contact in Exchange. Ignoring your own email address will exclude Appointments from syncing.

Note that Appointments will not sync in Match mode for Calendar Sync, regardless of your Ignore List settings. This mode requires a matching Salesforce Contact or Lead record and does not match with Salesforce User records.

Additional Resources: Learn more about excluding items from syncing in the **Configuring the Ignore List** section of this User Guide.

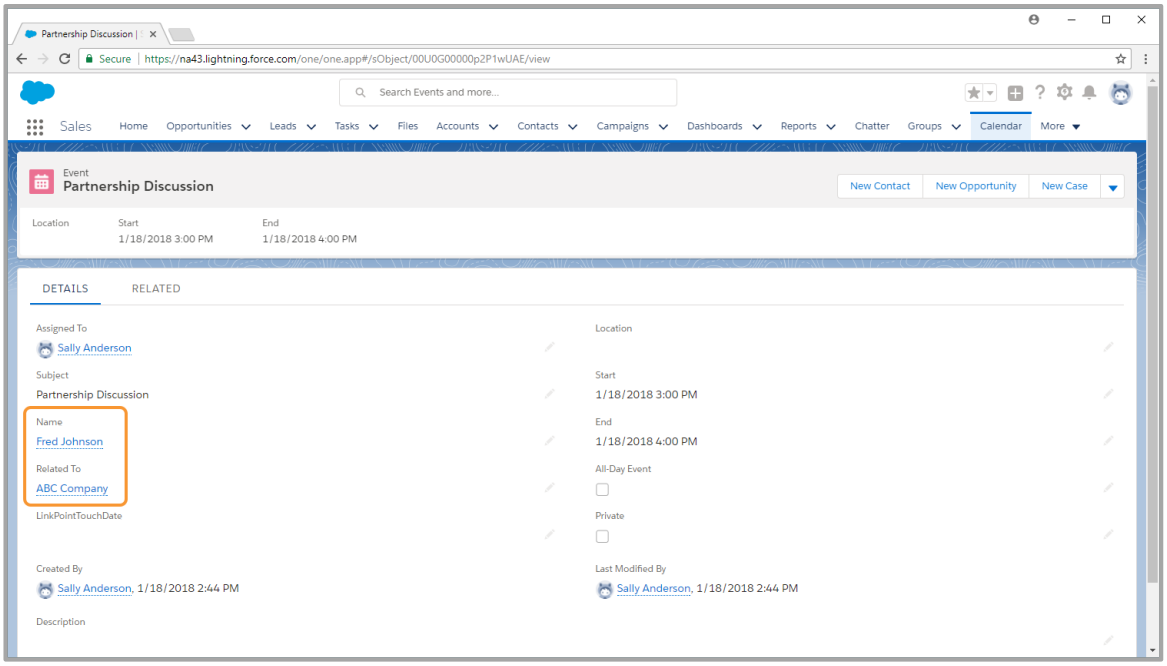
Private Calendar Items

Setting an item to Private on either your Exchange or Salesforce calendar will exclude the item from syncing between systems. However, Private items will not appear in the Calendar Sync History Excluded tab since the system completely ignores those items. Organizations that require Private calendar items to sync must contact their Account Executive and request a customization for their account.



Associations in Salesforce

Calendar items that sync from Salesforce to Exchange will retain any existing relationships established for the item in Salesforce. For example, a calendar item related to an Account remains related to the Account when syncing. However, you will not see the related information when viewing the calendar item in Exchange. This is a limitation of the Exchange interface. If your sync settings permit updates from Exchange to Salesforce, those updates will be applied when syncing and will not affect or overwrite any associations for the item in Salesforce.



Ignore List

Placing an email address or a domain on the Ignore List for Calendar Sync will prevent the item from syncing to any Salesforce records with a matching email address or domain. However, this does not prevent the item from syncing.

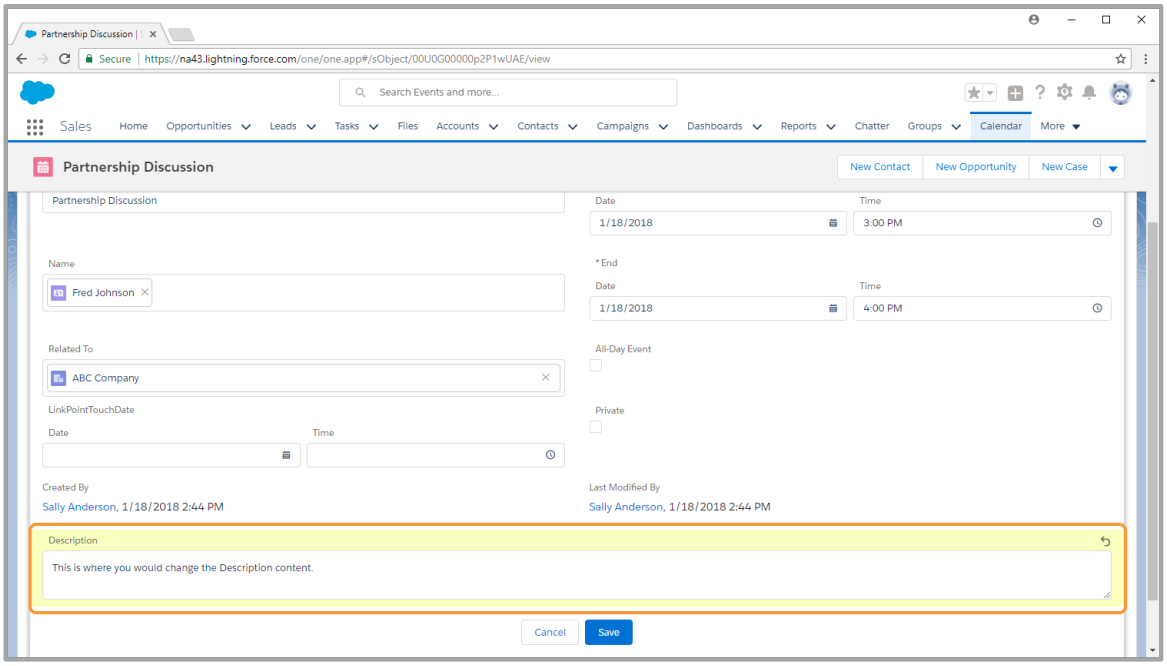
If you use the Sync All or Designate mode for Calendar Sync, the calendar item will sync regardless of whether a sender/recipient is on the ignore list. These two modes do not require Salesforce matching records in order to sync the item.

If you use the Match mode for Calendar Sync, the item will require a matching Salesforce record to sync. If all sender(s)/recipient(s) on the item are on the Ignore List, the item will not sync and will be listed as Unresolved. (For this to happen, you will need your own email address or domain to be on the Ignore List as well). If there is a combination of Salesforce matches and non-matches, the Ignore List items will be excluded as sync matches, and Cloud Edition will determine if any of the remaining sender/recipient(s) are Salesforce matches, and proceed with the sync behavior as designed.

Additional Resources: Learn more about excluding items from syncing in the **Configuring the Ignore List** section of this User Guide.

Updating Calendar Body/Description Content

Changes made to update calendar items in Exchange or Salesforce will sync to update the item in both systems unless you have enabled the Prevent Operations option to prevent updates. However, changes made to the Description field in Salesforce will not sync to Exchange or overwrite the content in the body of the Exchange item. This setting is in place to ensure that Exchange remains the master for a user's calendar since other Salesforce users may be able to inadvertently update or alter a calendar event.

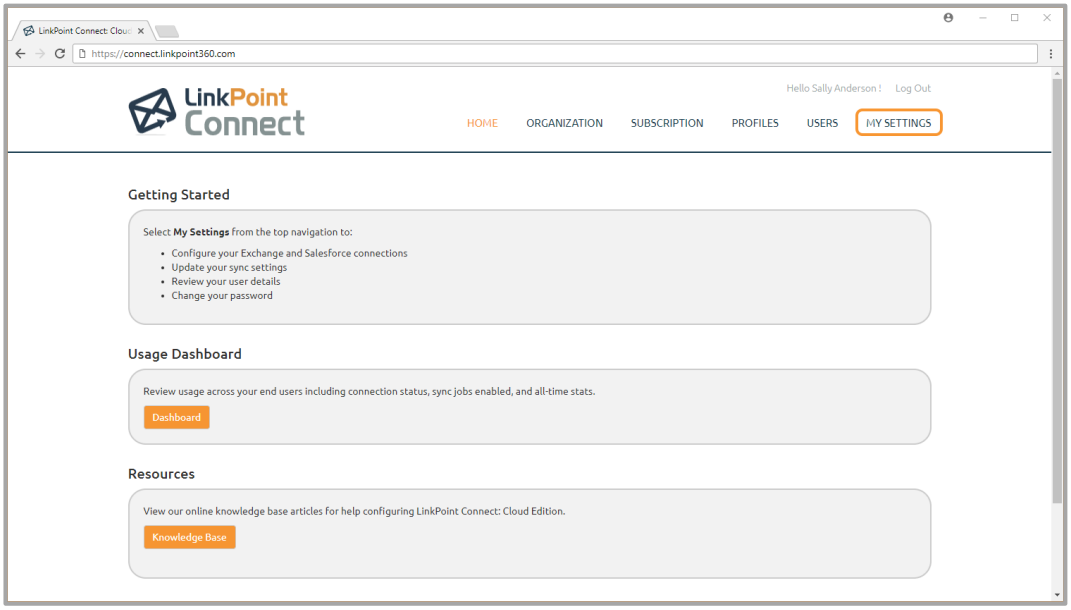


Reviewing Calendar Sync History

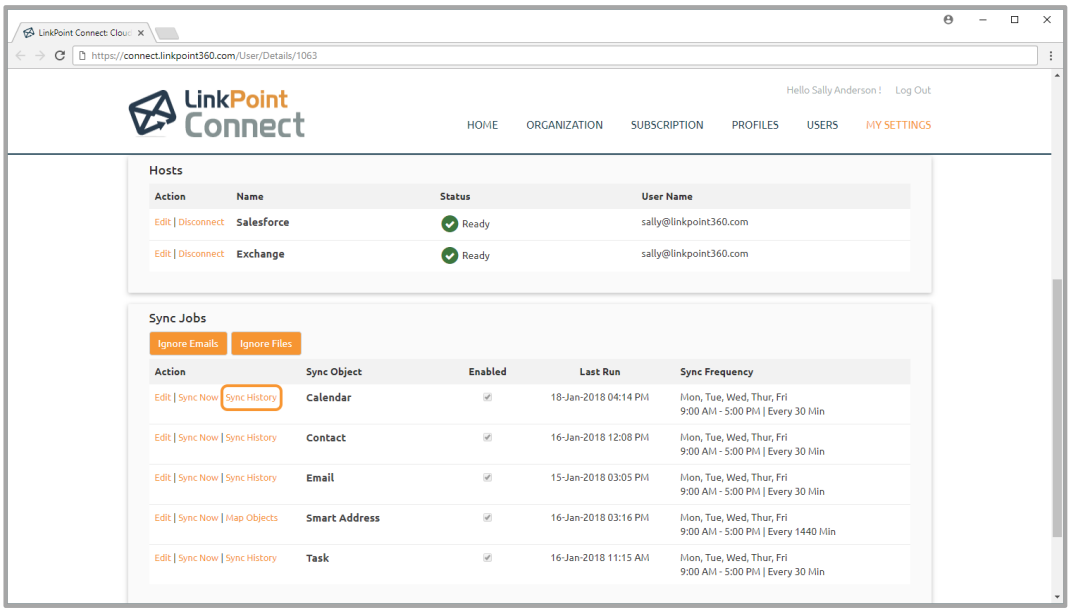
Cloud Edition Calendar Sync ensures the movement of data between Exchange and Salesforce based on preconfigured sync settings. Users can review how calendar items were synced between systems by reviewing the Calendar Sync History. This is especially helpful to confirm sync behavior and to review items that were excluded from the sync based on rules or missing Salesforce data. In this section, you will learn how to review the data presented in the Calendar Sync History.

Warning: Sync History retains user data for 30 days. The Sync History will be rebuilt for users who disconnect their Exchange or Salesforce hosts and reconnect with new details. This ensures that users are viewing the history for the current configuration.

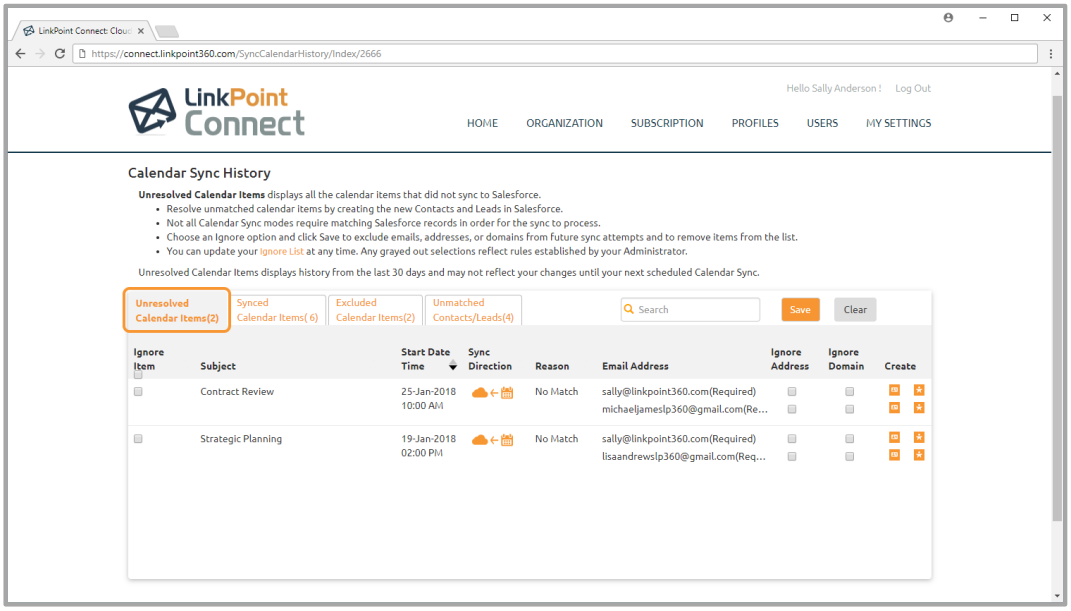
1 Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.



2 Locate the **Calendar Sync Object** in the **Sync Jobs** section and select the **Sync History** link.



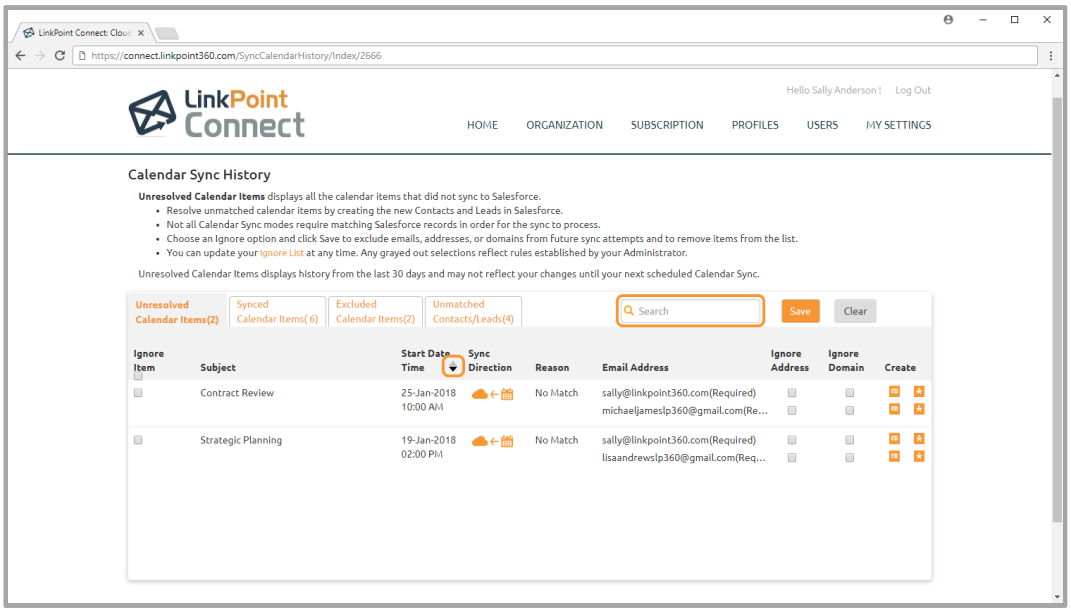
3 Review the **Unresolved Calendar Items** tab to view all of the calendar items that did not sync because items did not have matching Salesforce records or due to system error. Each row lists a single calendar item (meeting or appointment) and the related data.



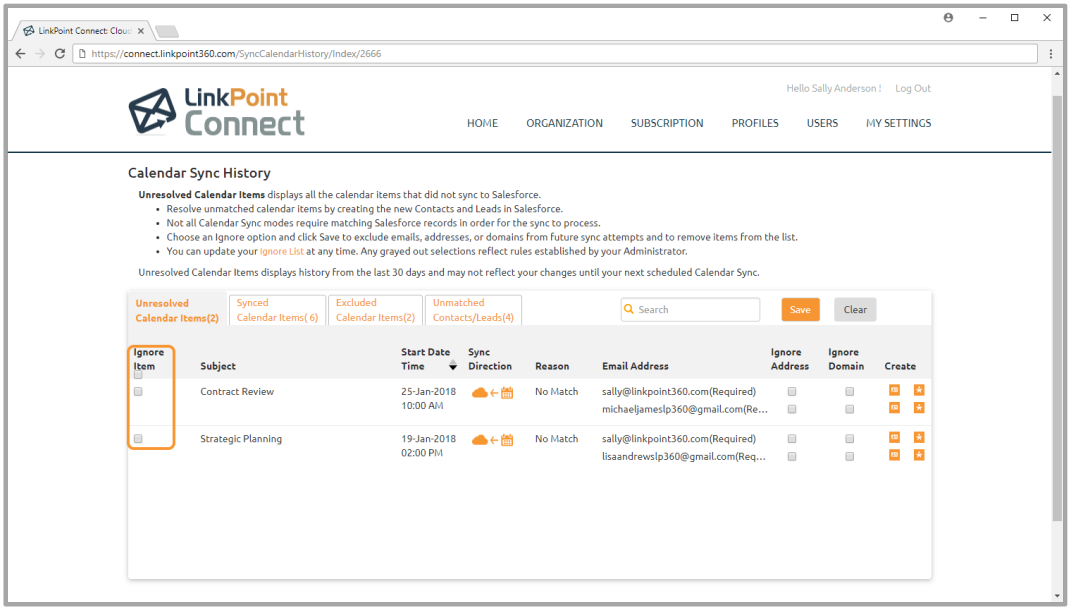
Unresolved Calendar Item	Definition
Ignore Item	Removes a calendar item from this list and no longer attempts to sync it.
Subject	Displays the subject line of the calendar item.
Start Date Time	Shows when the calendar item is scheduled to occur.
Sync Direction	Indicates whether the item was created in Outlook and attempted to sync to Salesforce or created in Salesforce and attempted to sync to Outlook.
Reason	Explains why the calendar item did not sync between systems.
Email Address	Displays all email addresses (senders/recipients) on the calendar item.
Ignore Address	Select the checkbox to add the specific email address to the Ignore List. Calendar items will not sync for this email address in the future. Grayed out selections are applied by your Admin and cannot be overridden.
Ignore Domain	Select the checkbox to add the specific email domain to the Ignore List. Calendar items will not sync for this email domain in the future. Grayed out selections are applied by your Admin and cannot be overridden.
Create	Select an icon to create a new Contact or Lead record in Salesforce. This will launch Salesforce in a new browser. Creating new leads and contacts will help to resolve calendar items in future sync attempts.

Tip: When you select the option to *Sync All Calendar Items*, the Unresolved Calendar Items tab will be blank since matching is not required unless an item could not sync due to an error. When using the *Attempt to Sync Calendar Items Only Where Matching Salesforce Records Are Found* mode, items will be unresolved when no matches are found in Salesforce during the sync. Items remain in this list until an action resolves the sync issue (i.e. adding a matching Contact in Salesforce, changing a sync setting to include the item in the next sync) or until the item exceeds 30 days of sync attempts.

4 Sort the items by clicking the column headers to view items in ascending or descending order. Search partial or full terms to filter the list and find specific items more quickly.

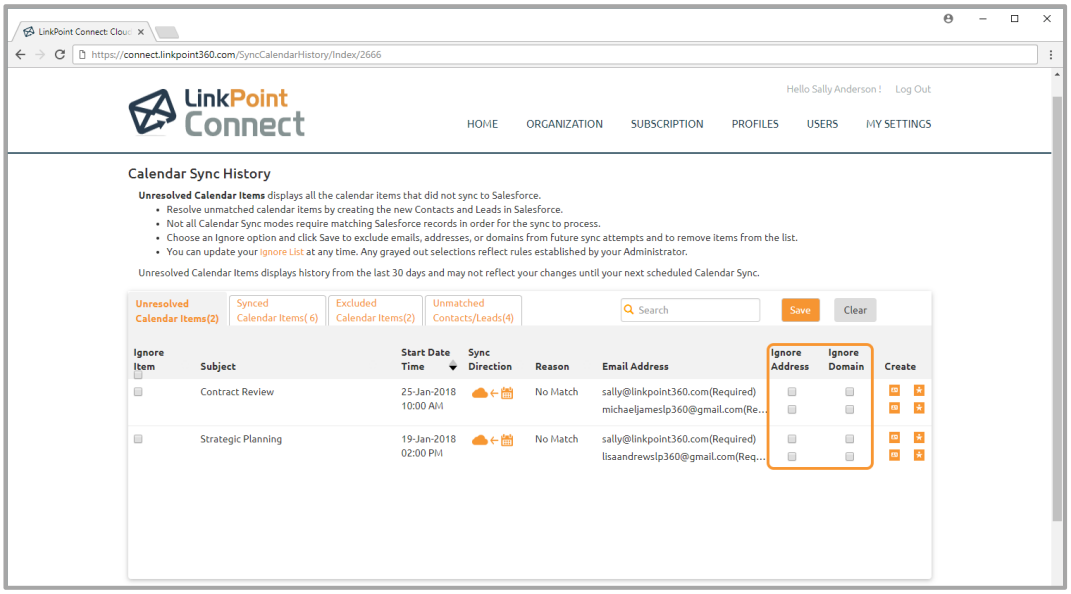


5 Select the **Ignore Item** checkbox to select single or multiple calendar Items. Click **Save** to remove the item(s) from future sync consideration.



Tip: Calendar Sync attempts to sync items for up to 30 days from the first time the item is created. Events in the Unresolved Calendar Items tab that you do not want or need to sync (i.e. invites to/from contacts that you do not intend to add to Salesforce) can be selected and excluded from future sync attempts. This will also remove them from the Unresolved Calendar Items list.

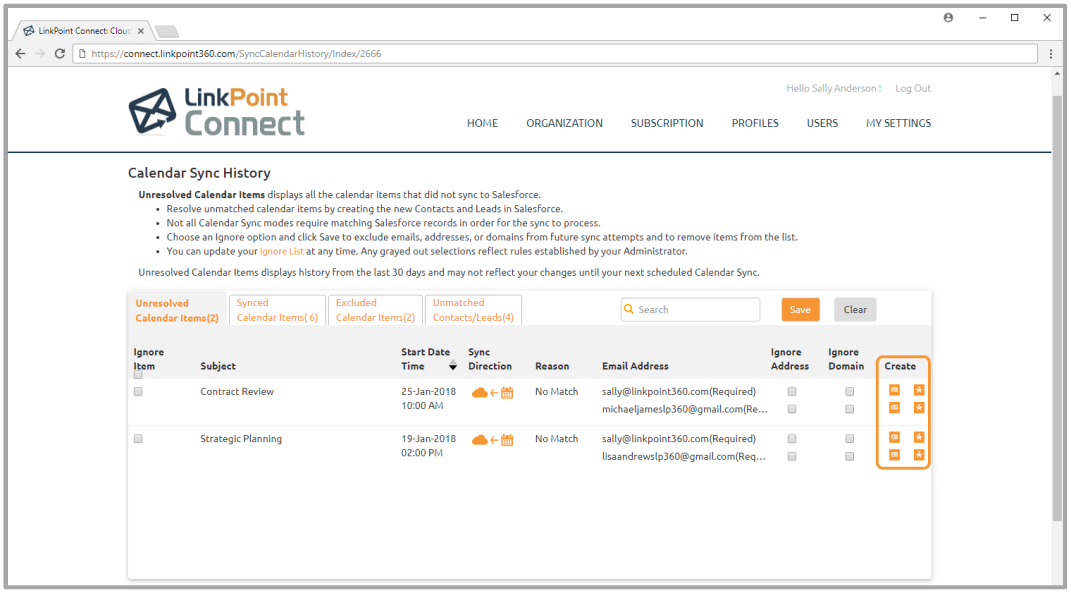
6 Select the **Ignore Address** or **Ignore Domain** checkbox(es) to add email addresses and/or domains to your Ignore List and exclude them from future sync consideration. This is useful for excluding calendar items from senders that you are certain you do not need to sync calendar items for or that you do not intend to sync.



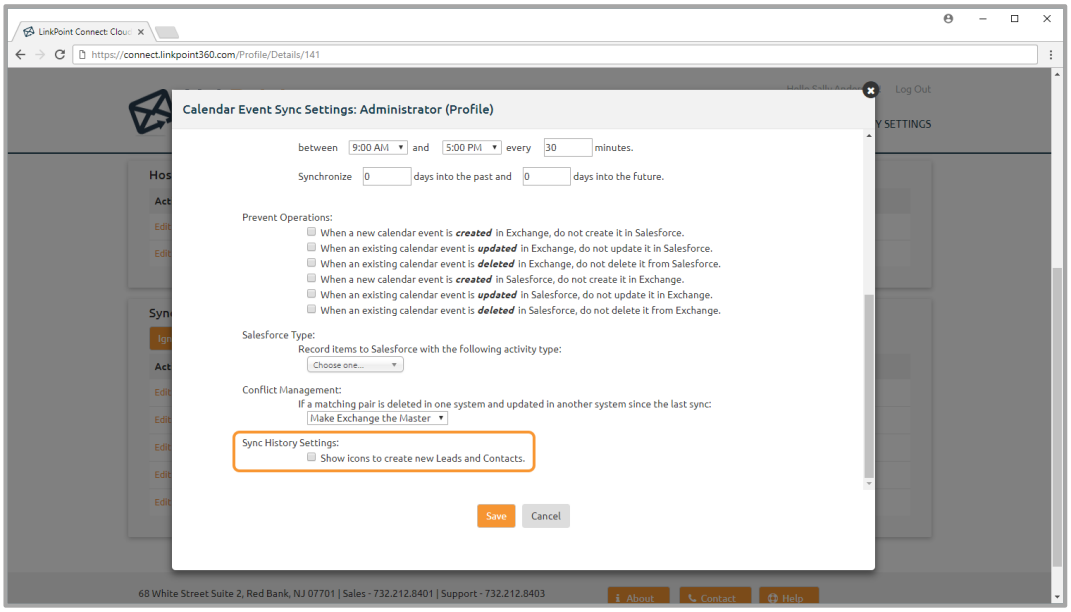
Tip: Email addresses and domains included in the Global Exclusion List by an Admin are completely omitted from the sync process and do not appear in the Sync History.

Additional Resources: Learn more about excluding email addresses and domains in the **Configuring the Ignore List** and **Configuring the Global Exclusion List** sections of this User Guide.

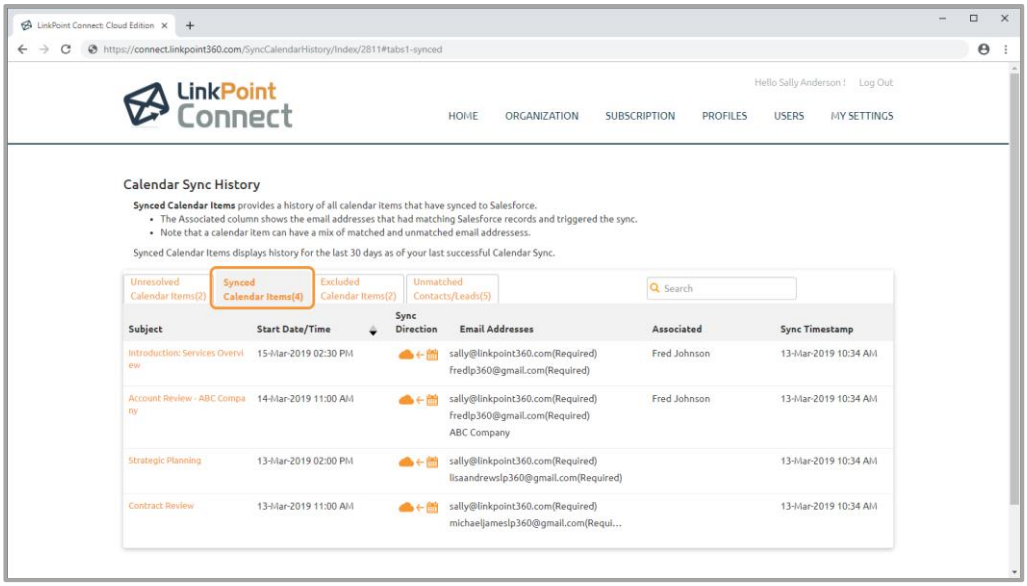
7 Select a **Create** icon for Contact or Lead to enter a new record in Salesforce. This will launch Salesforce in a new browser window. Creating new leads and contacts will help to resolve calendar items in future sync attempts.



Tip: Admins can disable the Create icons for Leads and Contacts. Navigate to the Calendar Sync Job Edit window on the Subscription or Profile levels and deselect the **Sync History Settings:** option to **Show icons to create new Leads and Contacts.**



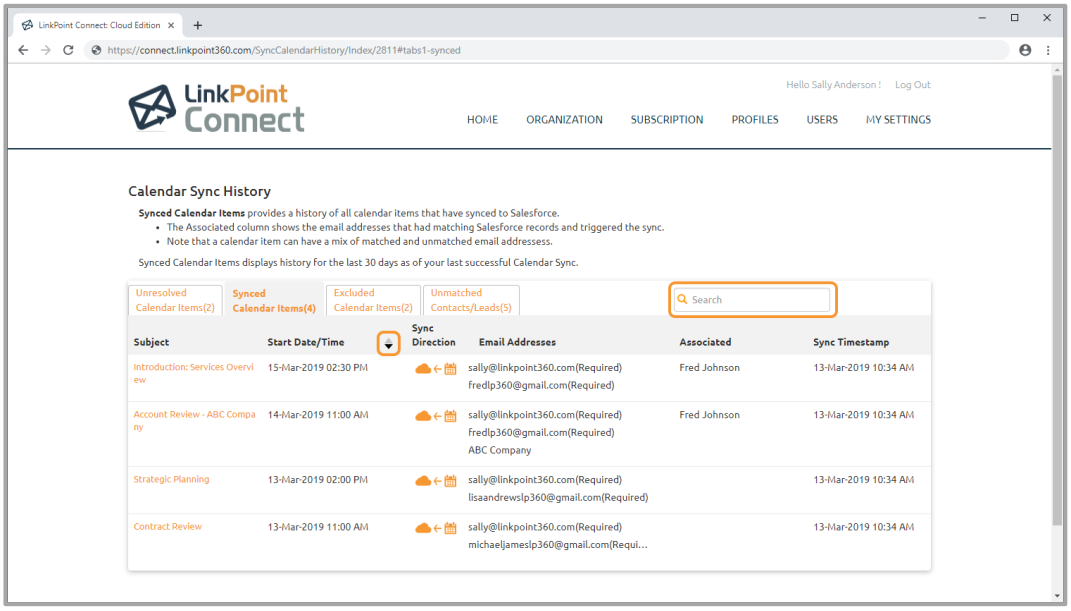
8 Select the **Synced Calendar Items** tab to view all of the calendar items that synced based on the established sync settings. Each row lists a single calendar item (meeting or appointment) and the related data.



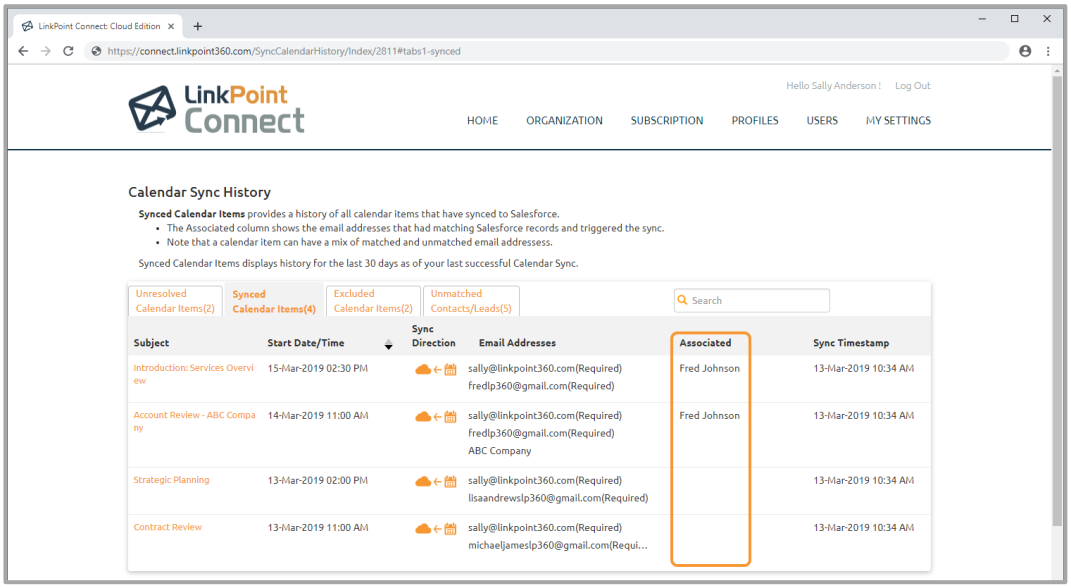
Synced Calendar Item	Definition
Subject	Displays the subject line of the calendar item. Click to view the recorded item in Salesforce.
Start Date/Time	Shows the scheduled start date and time for the calendar item.
Sync Direction	Indicates whether the item was created/updated in Outlook and attempted to sync to Salesforce or created/updated in Salesforce and attempted to sync to Outlook.
Email Addresses	Lists all of the email addresses included for a single calendar item.
Associated	Indicates the matching Salesforce record(s) the calendar item has been recorded to, where applicable.
Sync Timestamp	Shows the date and time that the item synced.

Tip: When you select the option to *Sync All Calendar Items*, all of the items will be listed in the Synced tab unless they were excluded (i.e. Do Not Sync Category) or if an item could not sync due to an error. When using the *Attempt to Sync Calendar Items Only Where Matching Salesforce Records Are Found*, a calendar item only requires one email address to match with a Salesforce record to be considered synced. When using *Sync Calendar Items Only When Designated* options, items will be marked as synced whenever they are flagged regardless of whether a match is found. Items remain in this list for review for 30 days.

9 Sort the items by clicking the column headers to view in ascending or descending order. Search partial or full terms to filter the list and identify specific items more quickly.

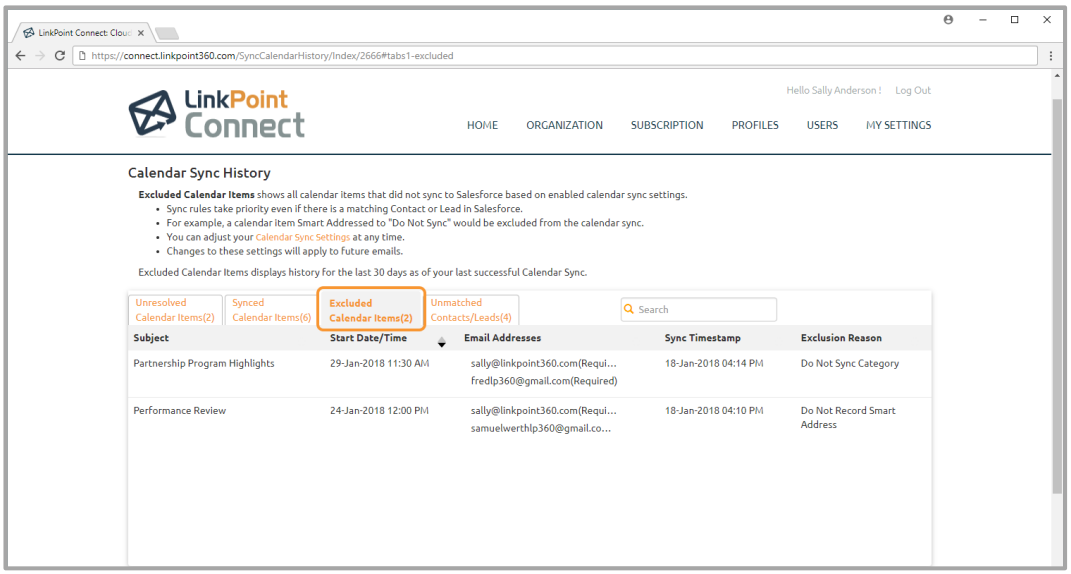


Tip: Email addresses for which there is a matching Salesforce record and that the system was able to record the item to are marked with the name of the Salesforce record under the **Associated** column. Note that not all Calendar Sync modes require matching.



Warning: Salesforce includes several limitations regarding how items can be recorded to multiple Salesforce records. When working with multiple leads or a mix of leads and contacts, items will only sync based on established Salesforce allowances. In these cases, Cloud Edition will indicate all records where the item was recorded with a green checkmark. However, there may be matching Salesforce records that the system was not permitted to record to due to the Salesforce restrictions.

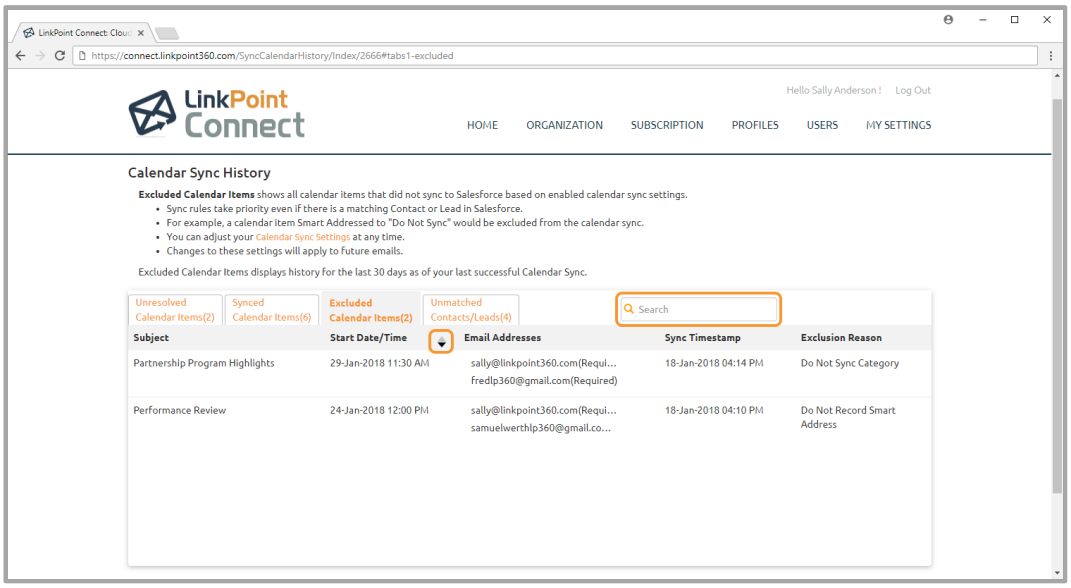
10 Select the **Excluded Calendar Items** tab to view all of the calendar items that were excluded from syncing based on the established sync criteria. Each row lists a single calendar item (meeting or appointment).



Excluded Calendar Items	Definition
Subject	Displays the subject line or title of the calendar item.
Start Date/Time	Shows the scheduled start date and time for the calendar item.
Email Addresses	Lists all of the email addresses included for a single calendar item.
Sync Timestamp	Shows when the calendar sync rules excluded the item from syncing to Salesforce.
Exclusion Reason	Indicates the sync criteria that excluded the calendar item from syncing.

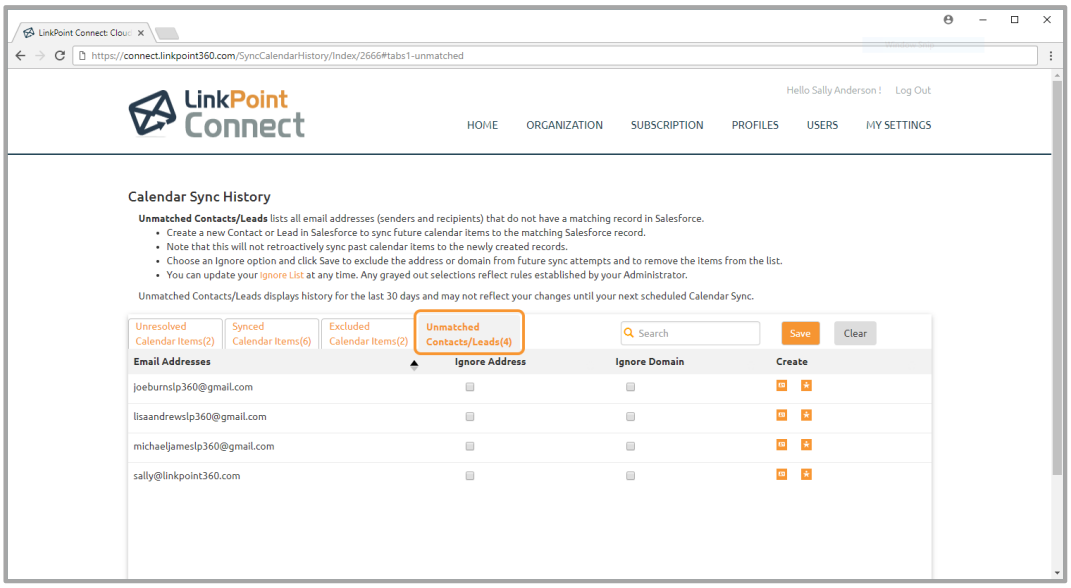
Tip: Different sync settings include different criteria that prevent items from syncing. For example, when selecting the option to *Attempt to Sync Calendar Items Only Where Matching Salesforce Records Are Found*, items that have no matches will not sync. Users can also proactively exclude items from syncing by setting the calendar item to Private in Outlook or by adding a Do Not Sync Category or Do Not Record Smart Address. Items remain in this list for review for 30 days. Note that Private items will not appear in the Sync History.

11 Sort the items by clicking the column headers to view items in ascending or descending order. Search partial or full terms to filter the list and find specific items more quickly.



Tip: Items that do not sync due to Prevent Operations settings will not appear in the Calendar Sync History since the system completely ignores those items when created, updated, or deleted, as specified.

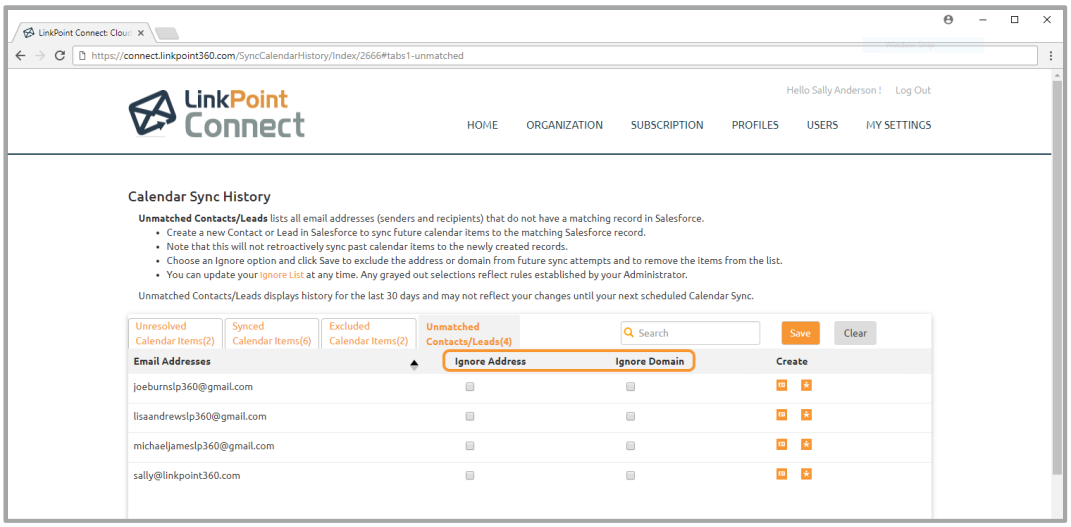
12 Select the **Unmatched Contacts/Leads** tab to view a list of all email addresses extracted from calendar items that do not have a matching Contact or Lead record in Salesforce.



Unmatched Contacts/Leads	Definition
Email Addresses	Shows email addresses that do not have matching Salesforce records.
Ignore Address	Adds the selected email address to your Ignore List to exclude from future syncs. Grayed out selections are applied by your Admin and cannot be overridden.
Ignore Domain	Adds the selected email domain to your Ignore List to exclude from future syncs. Grayed out selections are applied by your Admin and cannot be overridden.
Create	Select an icon to create a new Contact or Lead record in Salesforce. This will launch Salesforce in a new browser. Creating new leads and contacts will help to resolve calendar items in future sync attempts.

Tip: This screen is designed to make it easier for users to see which email addresses have not been added to Salesforce. For sync modes where matches are required, leaving numerous email addresses with no Salesforce match will result in a large number of unresolved or excluded items. This tab enables users to create records or to exclude email addresses and domains from future consideration with ignore settings. Creating a new Contact or Lead in Salesforce will enable the system to sync future calendar items that require a match. Note that this will not retroactively sync past calendar items to the newly created records. Items remain in this list for review for 30 days.

13 Select the **Ignore Address** or **Ignore Domain** checkbox(es) to add email addresses and/or domains to your Ignore List and exclude those items from future sync consideration. This is useful for excluding emails from senders that you are certain you do not need to record emails for and/or that do not and will not exist in your instance of Salesforce.

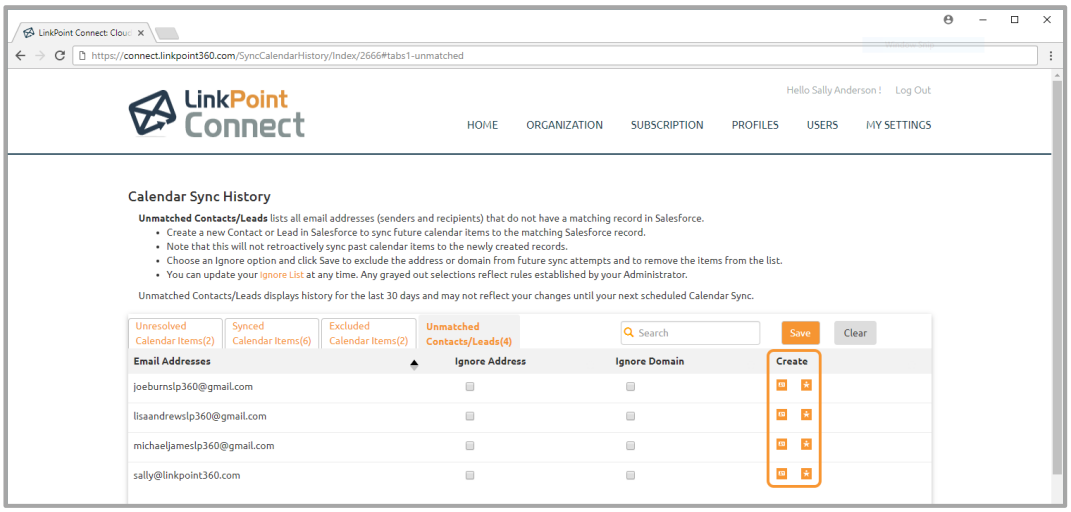


Tip: Calendar Sync attempts to sync items for up to 30 days from the first time the item is created. Unmatched Contacts or Leads that you do not intend to add to Salesforce can be selected and excluded in the future.

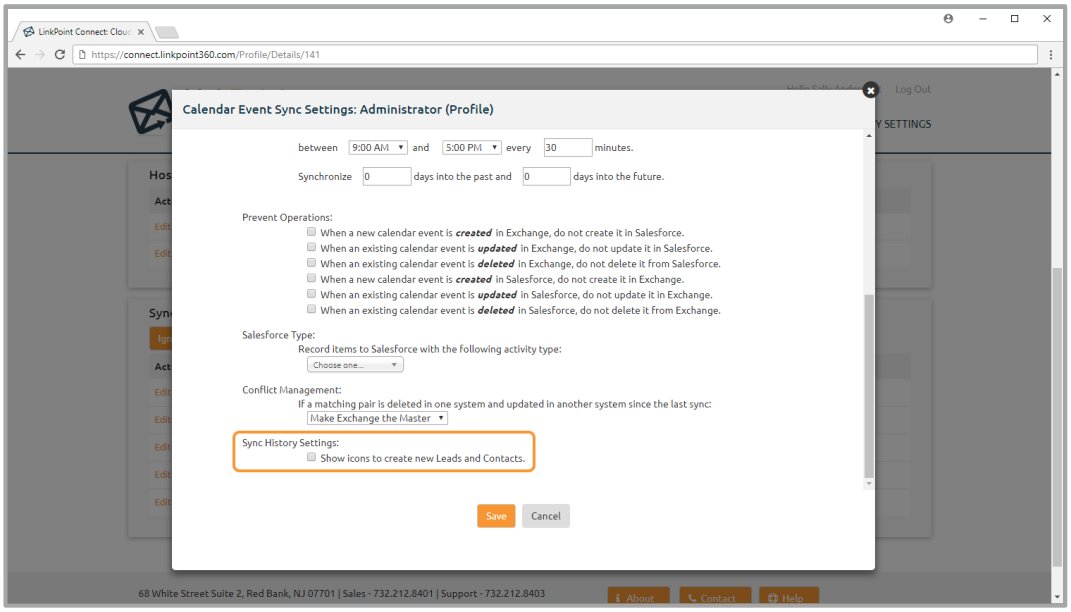
Tip: Items related to an email address or domain placed on the Global Exclusion List by an Admin will not appear in the Calendar Sync History since the system completely ignores those items.

Additional Resources: Learn more about excluding email addresses and domains in the **Working with Ignore Lists** section of this User Guide.

14 Select a **Create** icon for Contact or Lead to enter a new record in Salesforce. This will launch Salesforce in a new browser window. Creating new leads and contacts will help to resolve calendar items in future sync attempts.



Tip: Admins can disable the Create icons for Leads and Contacts. Navigate to the Calendar Sync Job Edit window on the Subscription or Profile levels and deselect the **Sync History Settings:** option to **Show icons to create new Leads and Contacts.**



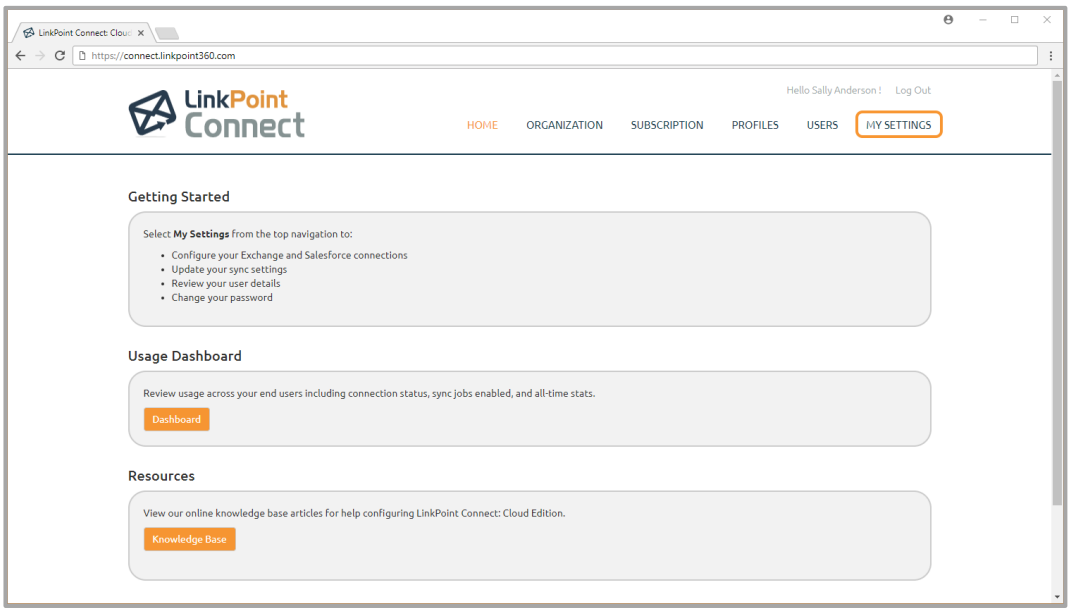
Syncing Emails

Configuring Email Sync Jobs

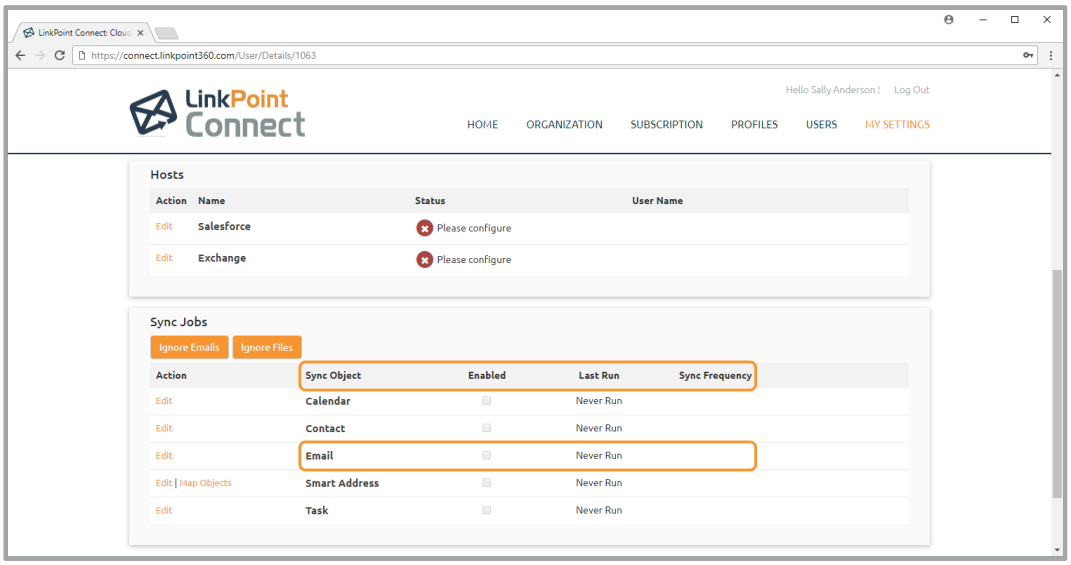
Cloud Edition includes a variety of flexible synchronization settings for managing how emails are automatically recorded to Salesforce from Microsoft Exchange. Before enabling Email Sync, it is important for users to become familiar with the available Cloud Edition sync settings. The synchronization of emails, calendars, contacts, and tasks works similarly but can be managed separately based on user preference. In this section, you will learn how to access and alter the email sync settings available with Cloud Edition.

Tip: Cloud Edition Admins have the ability to set default sync settings and/or lock down these settings to prevent end user override. Your instance of Cloud Edition may not allow you to change any/all of the settings described in this section, depending on how your Admin has configured your access. Settings that are preset and locked by an Admin are visible to end users but are grayed out and cannot be edited.

1. Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.

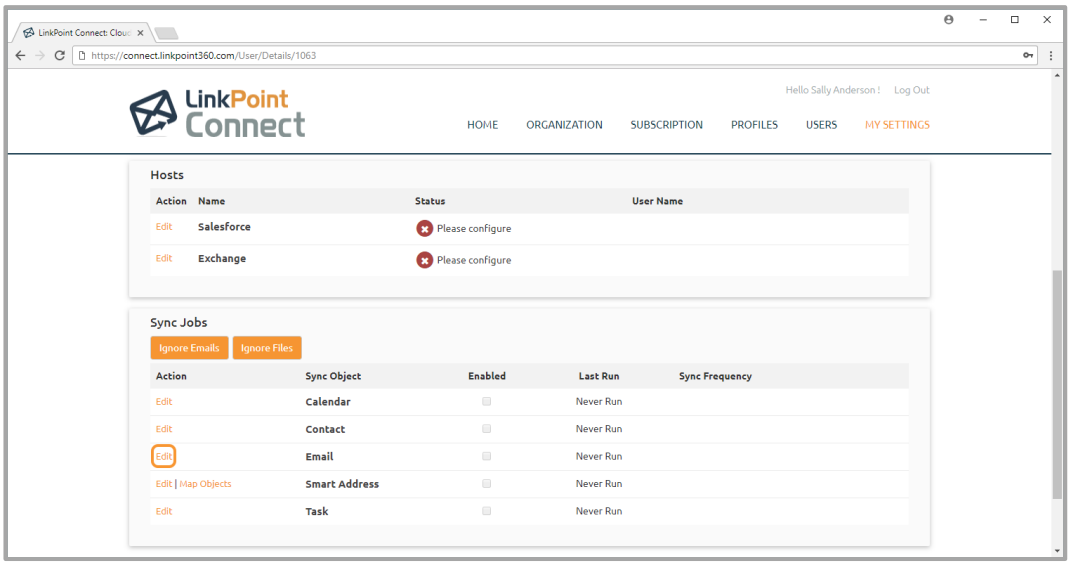


2 Locate the **Sync Jobs** section and note the information displayed for the **Email Sync Object**. At a glance, users can see whether the Email Sync is **Enabled**, when the sync was **Last Run**, and the configured **Sync Frequency**.



Tip: The first time you set up your Email Sync, the **Enabled** checkbox will be deselected, the **Last Run** date and time will be listed as **Never Run**, and the **Sync Frequency** will be blank.

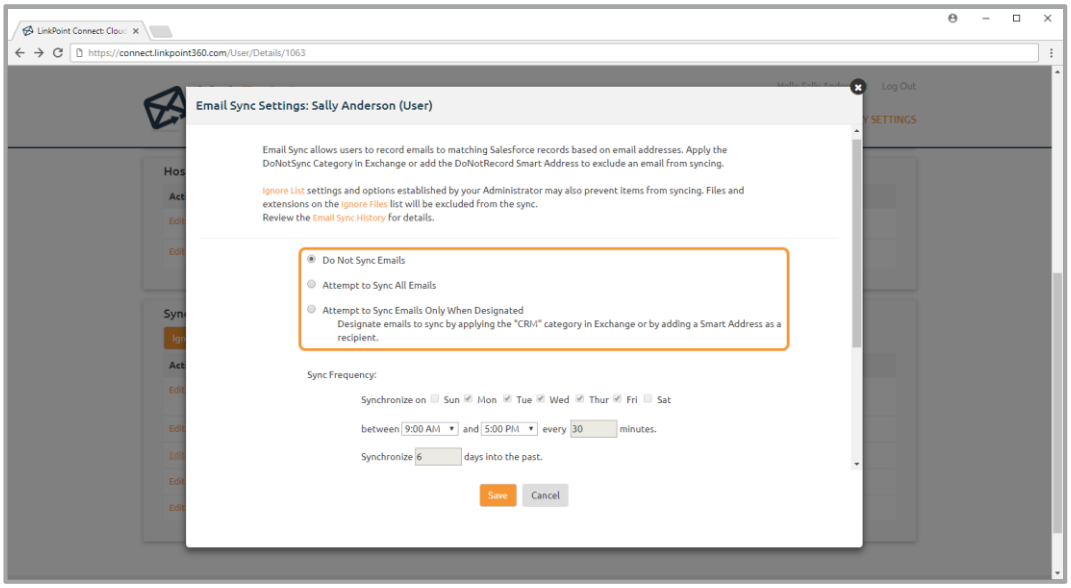
3 Select the **Edit** link for the **Email Sync Object** to view the available sync options.



Tip: To review the sync settings without making changes, you can select **Email** to open the Email Sync Settings window. This will show all of the settings as read only. You can click the **Edit** button to make changes to the settings if needed.

4 Select a sync option to enable Email Sync. Note that there are three modes to choose from based on how you would like the data to be handled.

- Do Not Sync Emails:
  Disable Email Sync. Email sync is off by default for all new accounts and new users.
- Attempt to Sync All Emails:
  Enable Cloud Edition to sync emails for which there is a Salesforce record with a matching email address.
- Attempt to Sync Emails Only When Designated:
  Enable Cloud Edition to sync only the emails you opt into the sync. Designate emails to sync by applying a CRM Category in Exchange or by adding a Smart Address as a recipient. Designated emails still require a matching Salesforce record in order to sync.



Warning: If you enable Designate mode and run your sync, the items without a designation during the sync attempt will be excluded.

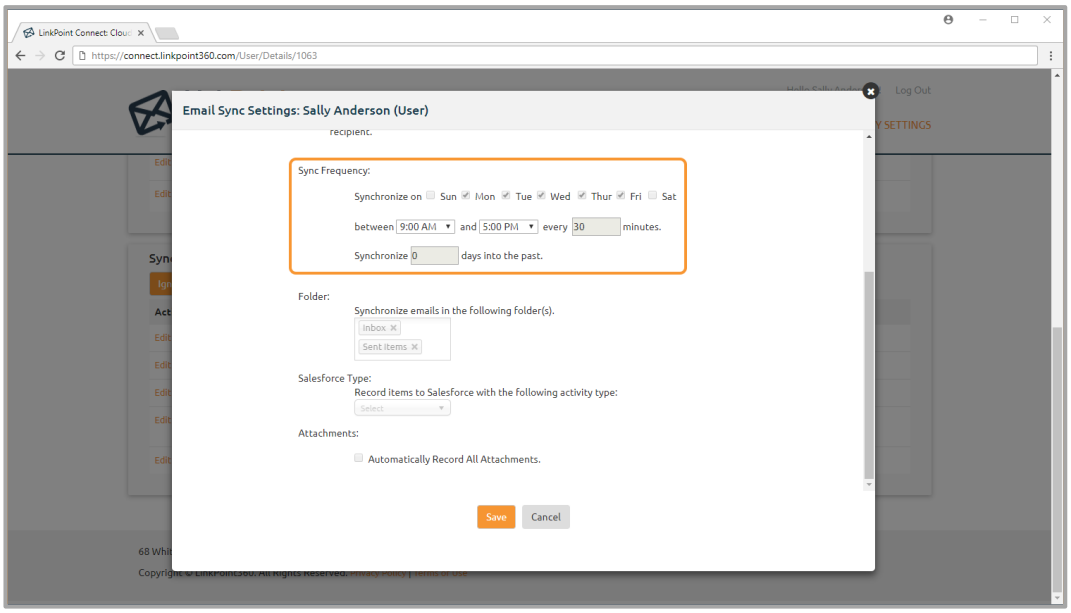
Tip: If an option other than **Do Not Sync Emails** is already selected for you during your initial set up, your Admin may have preconfigured the setting. If you are not able to change the mode selection, your Admin may have locked down the setting.

Tip: There are several ways to exclude an email from syncing.

- Add an Exchange Category with the name *DoNotSync* to the email.
- Include the *DoNotRecord* Smart Address as a recipient on the email. Adding the Smart Address to the Bcc field will hide this tag from other recipients.

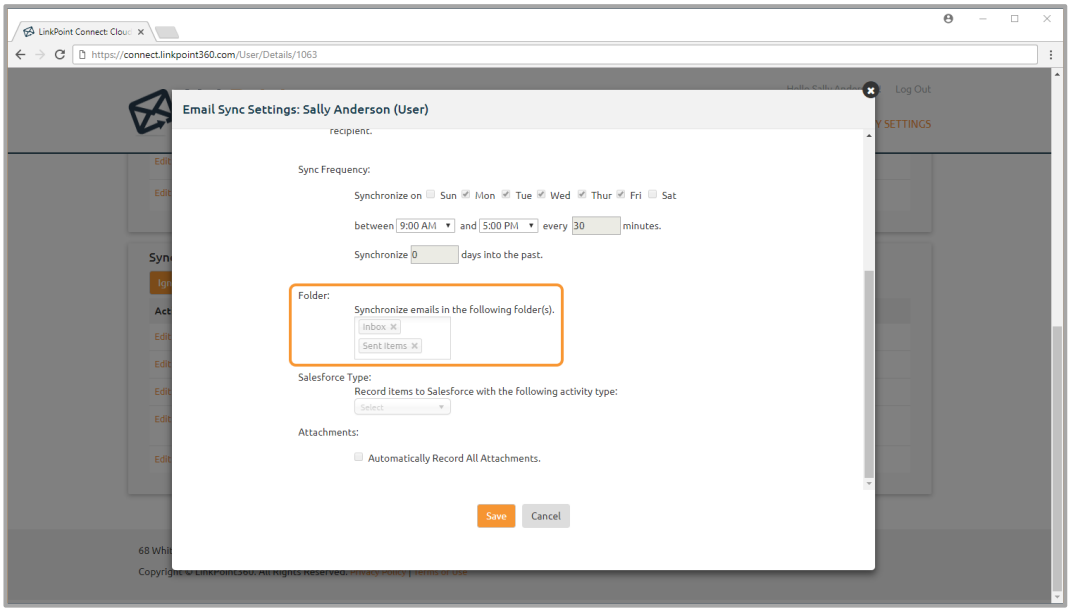
Additional Resources: Learn more about Smart Address in the **Configuring Smart Address Sync** section of this User Guide.

5 Enter the preferred **Sync Frequency** in the provided fields. Select the day and time range during which you want the sync to run. Note that these times will be based on the time zone you set for your user account.

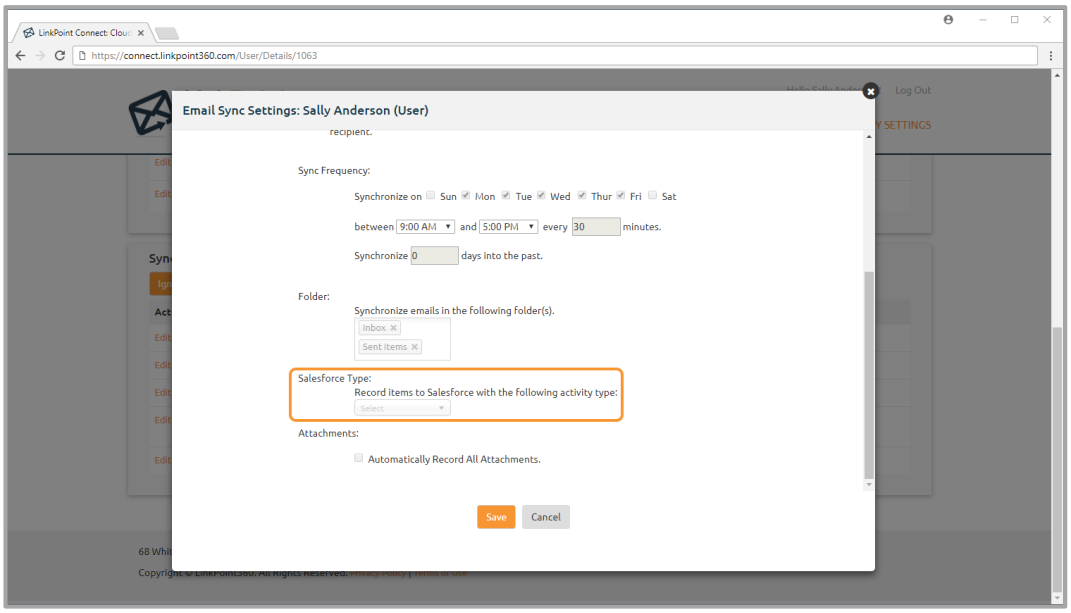


Tip: The maximum sync frequency cannot exceed 30 minutes. Users cannot sync more than 30 days of past emails and must sync at minimum 1 day of past emails.

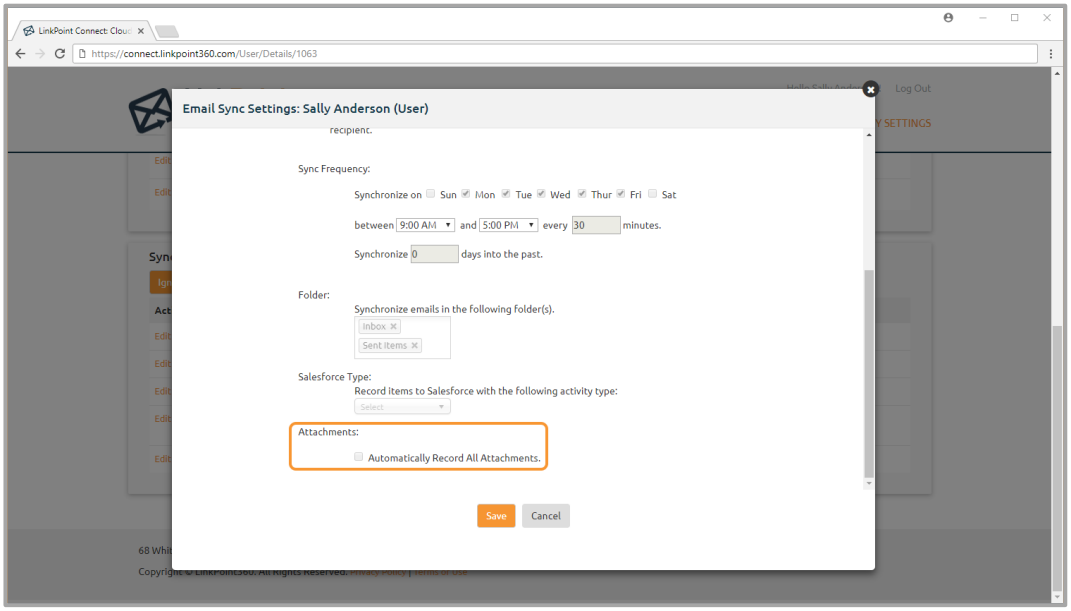
6 Change the **Folder** to map the sync to look for emails in different Exchange folders. The default selection will be your Inbox and Sent Items in order to sync all inbound and outbound communication.



7 Choose a **Salesforce Type** to record emails to Salesforce with a default Activity Type. If no selection is made, the system will use the Salesforce default.



8 Select the checkbox to **Automatically Record All Attachments** to sync all of the attachments on any email that records to Salesforce.

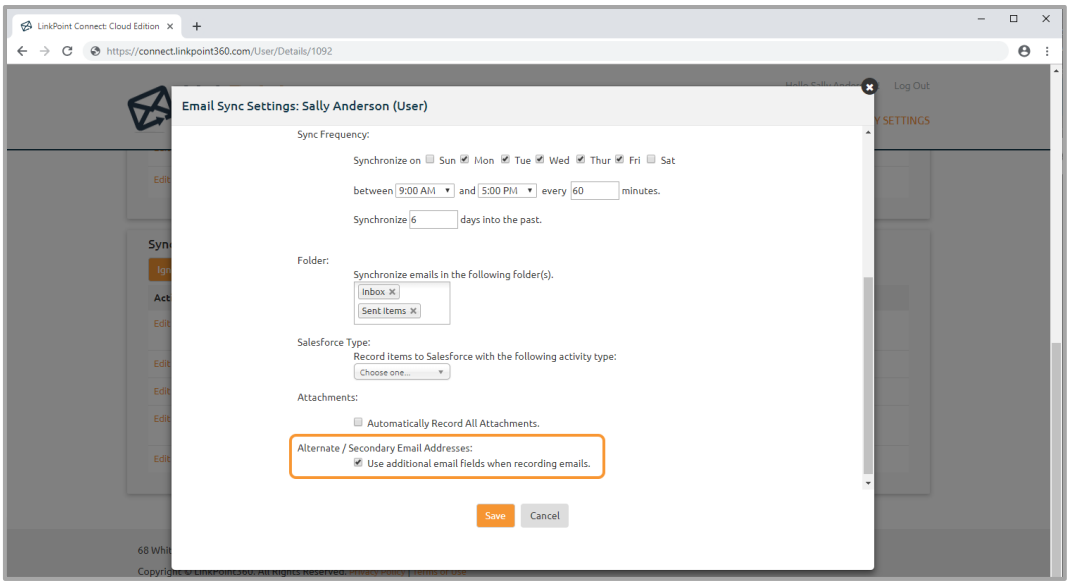


Tip: If you want to selectively record attachments, leave this option deselected and use the Record Attachments Smart Tag.

Tip: Attachments that do not exceed 5 MB will sync to Salesforce. Due to Salesforce restrictions on file sizes, files larger than 5 MB will not sync. However, the email content will still sync to Salesforce.

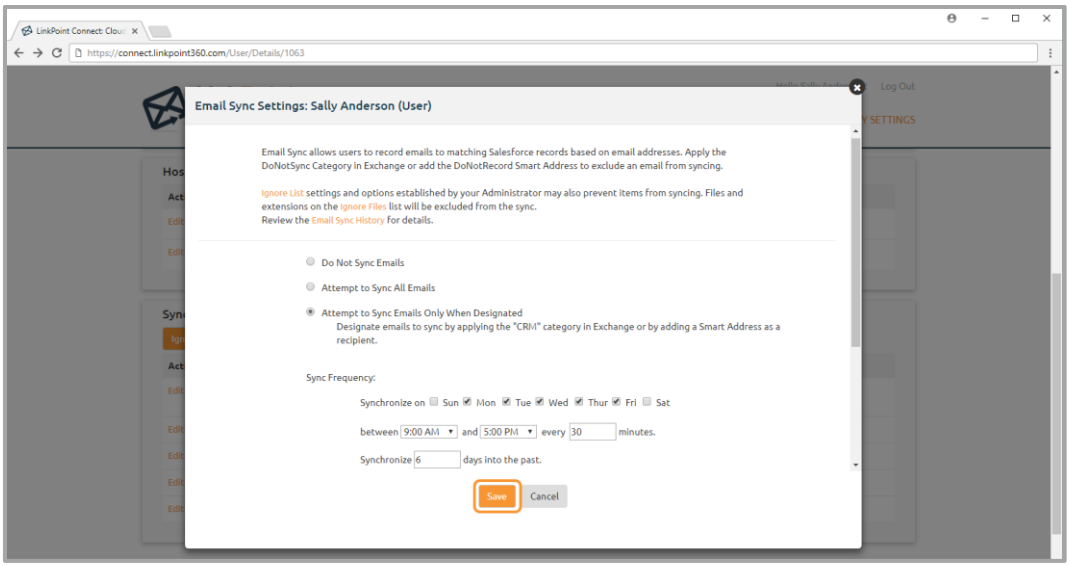
Additional Resources: Learn more about working with attachments in the **Syncing Email Attachments** and **Tagging Emails and Calendar Items with Smart Addresses** sections of this User Guide.

9 Select or deselect the **Alternate/Secondary Email Addresses** checkbox to use additional fields when syncing emails.

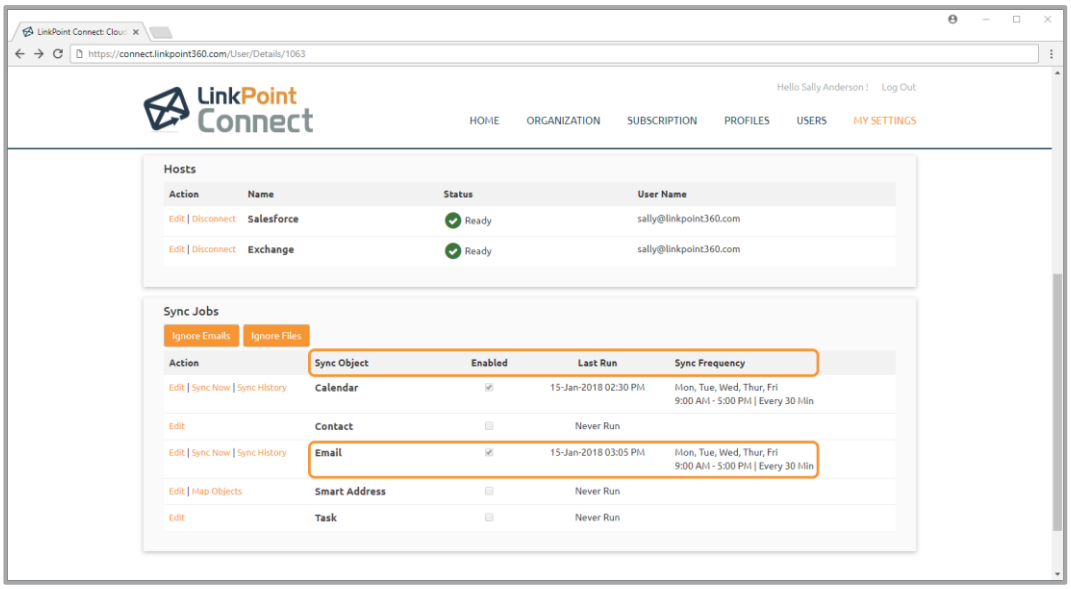


Tip: If you have multiple email address fields on Contact or Lead records, this option will allow for syncing based on all of the fields. This option is enabled by default.

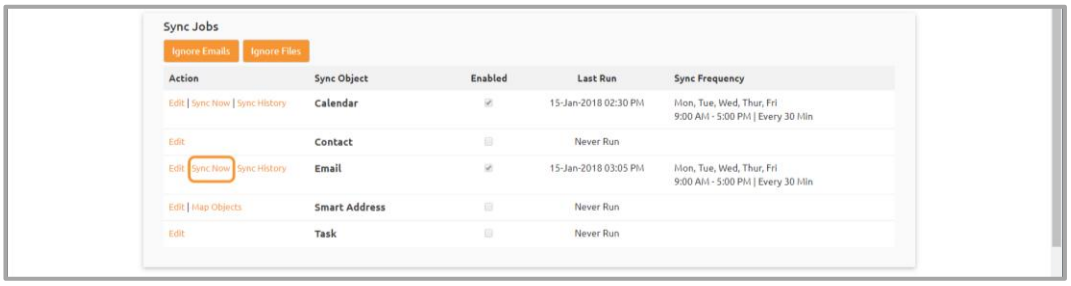
10 Click the **Save** button when finished. Then close the **Email Sync Settings** window.



11 The Email Sync will run immediately after it is enabled. The Sync Jobs will show the last run date and time and will reflect the Sync Frequency that was selected when editing the sync.



Tip: To run the Email Sync again, you can click the **Sync Now** option. This will place the Sync Job in the queue for processing. This does not mean that the sync immediately runs. The process can take several minutes depending on the amount of data that meets the sync criteria. To click **Sync Now** again, refresh the page.



Tip: Emails that sync to Salesforce will be marked with a CRM category in Microsoft Outlook. This feature is not available for mobile users.

Tip: All email sync modes automatically identify inbound replies to your emails. When a reply matches an existing Contact or Lead in Salesforce, the email is recorded to the Salesforce record. This works with replies for up to 10 days after the original email.

Warning: During the sync, all fields (excluding Body and Subject) that are created or updated in Salesforce are validated for maximum length requirements and truncated according to Salesforce limits. Items with Subjects that exceed the maximum length requirements in Salesforce will not sync. By default, emails with Body character counts that exceed the maximum length requirements in Salesforce will be split and recorded as multiple entries.

Syncing Email Attachments

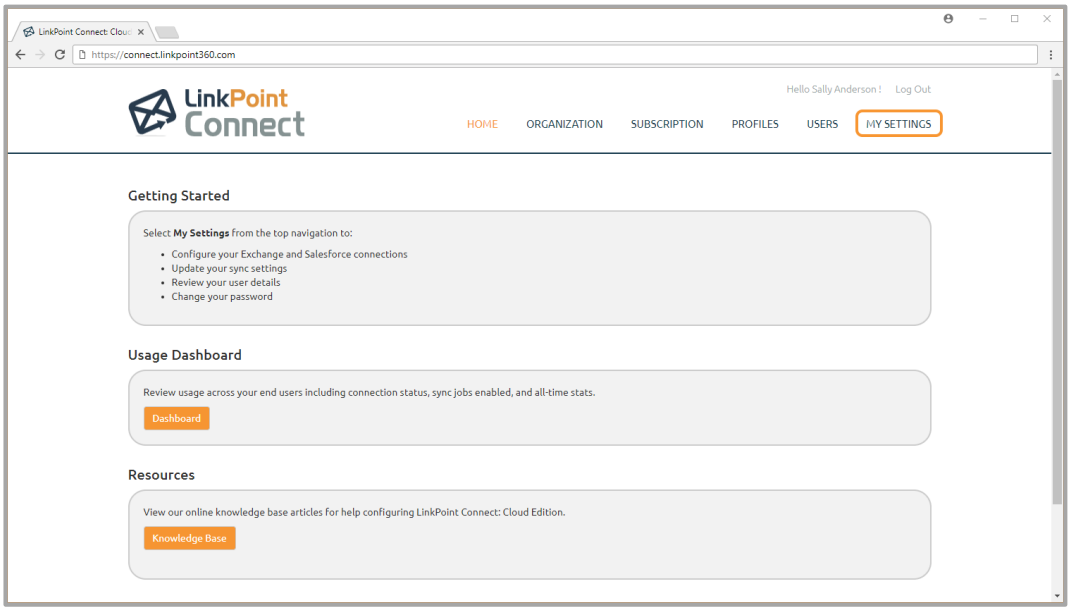
Cloud Edition includes the option for users to record attachments when syncing emails from Outlook to Salesforce. Users can enable automatic sync settings or one-off record all of the attachments on a particular email based on need. In this section, you will learn how to sync email attachments to Salesforce.

Tip: Cloud Edition Admins have the ability to set default sync settings and/or lock down these settings to prevent end user override. Your instance of Cloud Edition may not allow you to change any/all of the settings described in this section, depending on how your Admin has configured your access. Settings that are preset and locked by an Admin are visible to end users but are grayed out and cannot be edited.

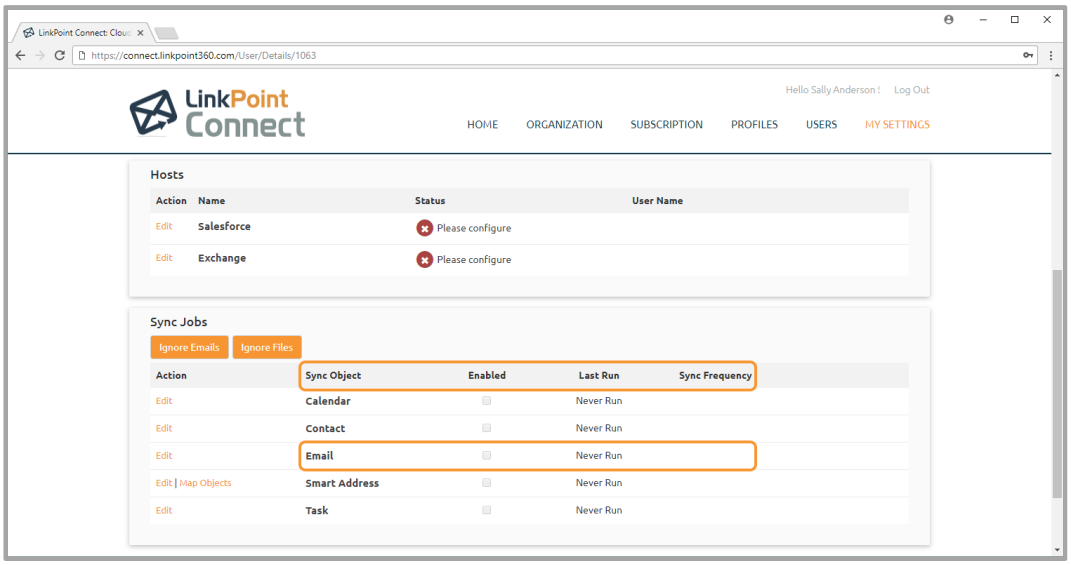
Warning: The ability to sync attachments applies to Email Sync only. This feature is currently not available for Calendar or Task Sync. Note that when you record attachment either automatically or ad hoc, all of the attachments on the email are recorded at the same time to the corresponding Salesforce records. Users cannot choose specific attachments on an email.

Tip: Attachments that do not exceed 5 MB will sync to Salesforce. Due to Salesforce restrictions on file sizes, files larger than 5 MB will not sync. However, the email content will still sync to Salesforce.

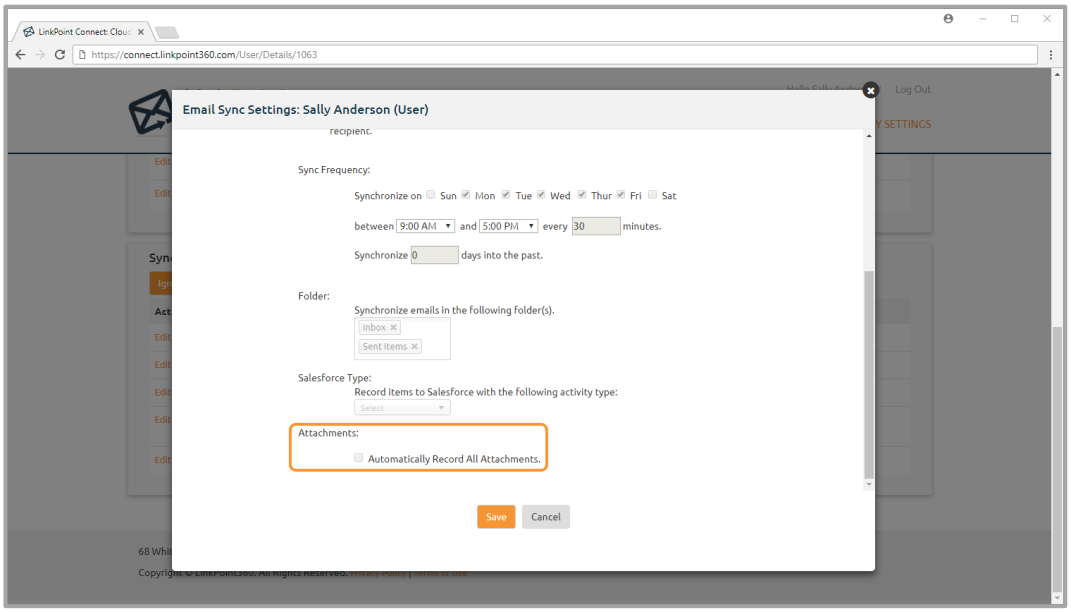
1. Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.



2 Select the **Edit** link for the **Email Sync Object** to view the available sync options.



3 Select the checkbox to **Automatically Record All Attachments** to sync all of the attachments on any email that records to Salesforce.

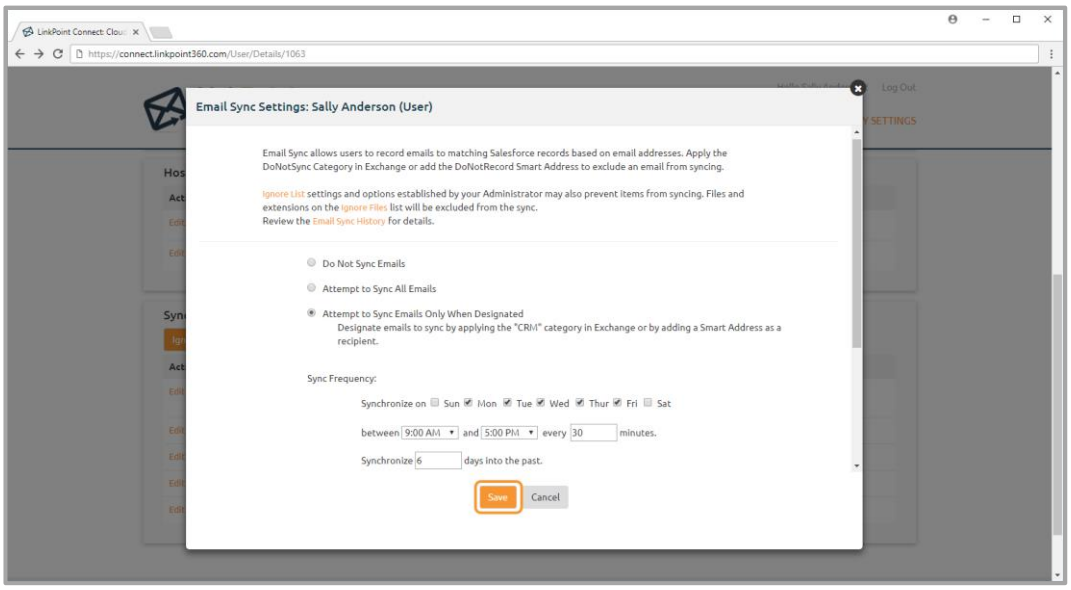


Tip: This will make sure that all of the attachments on the emails that sync based on your selected Sync Settings will be recorded to Salesforce. If you want to selectively record attachments, leave this option deselected and use the Record Attachments Smart Tag.

Tip: Note that attachments do not sync when linked with OneDrive. OneDrive documents are always excluded from sync.

Additional Resources: Learn more about working with attachments in the **Tagging Emails and Calendar Items with Smart Addresses** section of this User Guide.

4 Click the **Save** button when finished. Then close the **Email Sync Settings** window.



Tip: Cloud Edition supports Salesforce instances that use the Files Object for attachments. If you have the Files Object enabled in Salesforce, attachments will record to this object and will be displayed in the page layouts wherever the Files Object has added by your Salesforce administrator. When the Files are recorded, they appear under the Files Related List and a reference is added to the File in the Notes & Attachments Related List. The recorded File in Salesforce will also display the related items. Organizations not using the Files Object will see attachments within the Notes & Attachments section on the related records.

Troubleshooting Email Sync

Cloud Edition offers users the flexibility to customize how Email Sync records emails to Salesforce from Microsoft Exchange. When getting started, users may experience outcomes that do not match their expectations for the sync functionally. In this section, you will review some common scenarios to help with troubleshooting Email Sync and to guide you as you configure your settings.

Leads and Email Sync

Cloud Edition supports syncing items sent or received from Salesforce Lead records. However, Salesforce limits items to sync only to a single Lead Record. An email sent to a single lead can sync to the matching Salesforce Lead Record. However, an email sent to two or more leads can sync only to a single Salesforce Lead Record. In these instances, Cloud Edition will sync the item to the first Lead Record match listed in the To or From field (depending on whether the item is inbound or outbound).

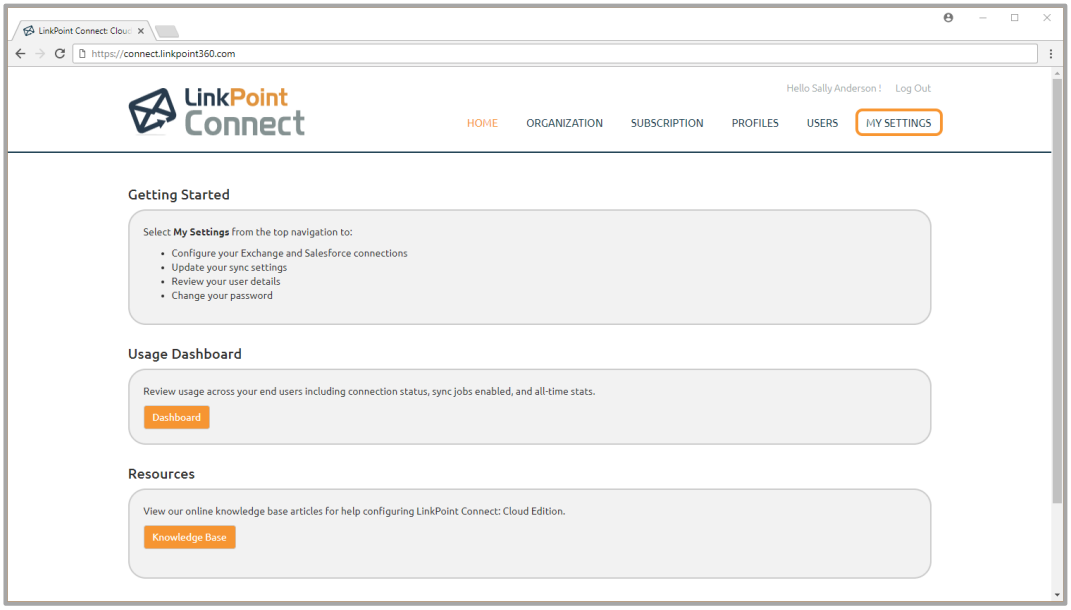
There are also Salesforce limitations when working with a mix of Lead and Contact Records. An email sent to multiple Contacts and Leads with matching Salesforce Records will sync to the matching Contact Records. The item will not sync to the Lead Record(s) since Salesforce prevents working with a mix of Contacts and Leads. Cloud Edition gives priority to the Contact Records in the To or From fields (depending on whether the item is inbound or outbound).

Reviewing Email Sync History

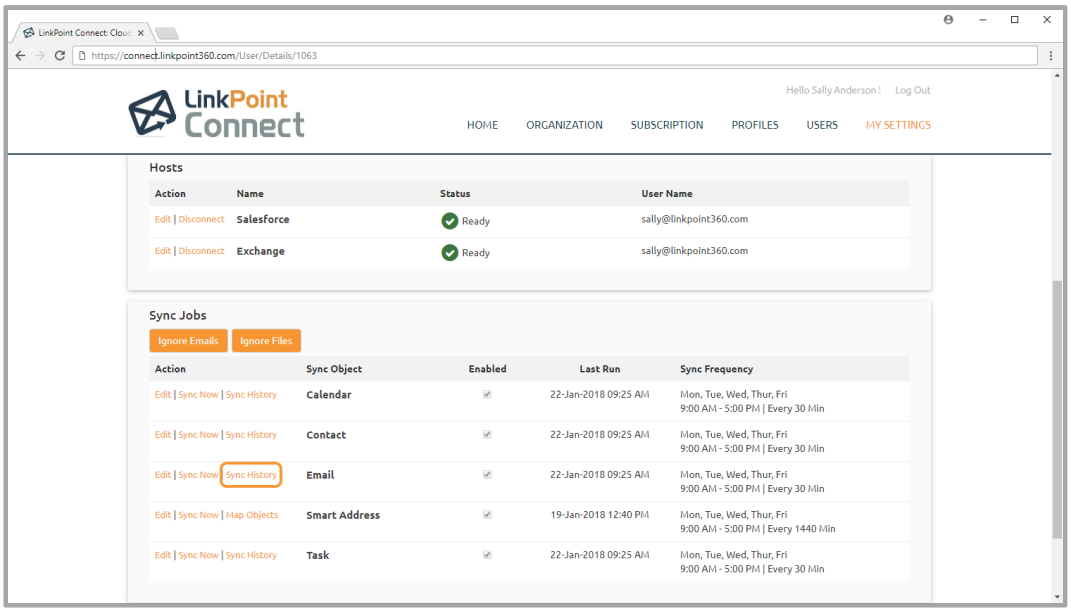
Cloud Edition Email Sync ensures the recording of emails to Salesforce from Microsoft Exchange based on preconfigured sync settings. Users can review how emails were recorded to Salesforce by reviewing the Email Sync History. This is especially helpful to confirm sync behavior and to review items that were excluded from the sync based on rules or missing Salesforce data. In this section, you will learn how to review the data presented in the Email Sync History.

Warning: Sync History retains user data for 30 days. The Sync History will be rebuilt for users who disconnect their Exchange or Salesforce hosts and reconnect with new details. This ensures that users are viewing the history for the current configuration.

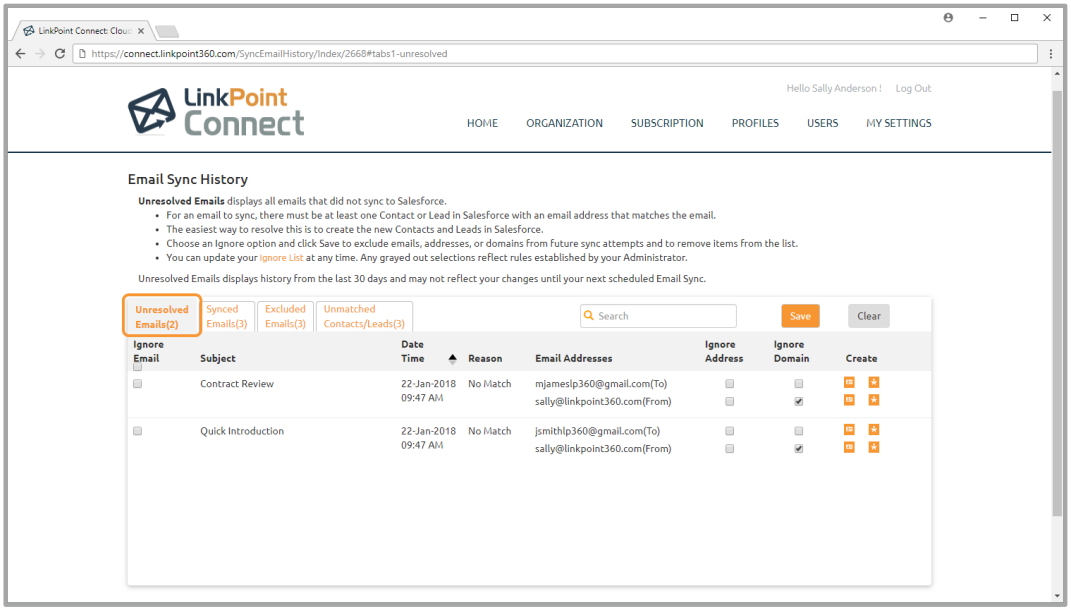
1 Log in to Cloud Edition and select the **My Settings** option in the top right corner of the screen.



2 Locate the **Email Sync Object** in the **Sync Jobs** section and select the **Sync History** link.

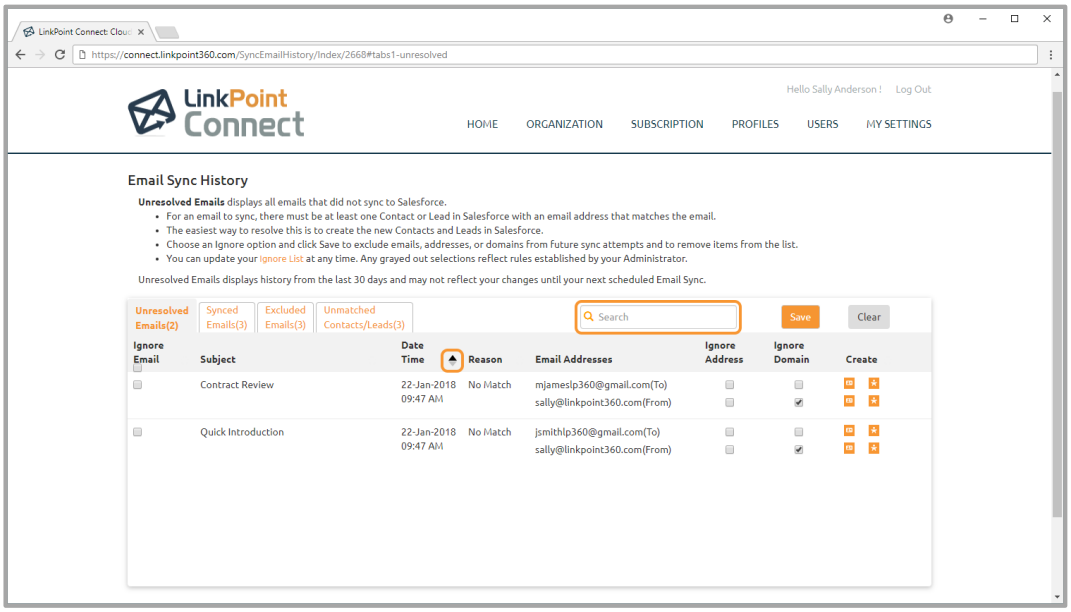


3 Review the **Unresolved Emails** tab to view all of the emails that did not sync because items did not have matching Salesforce records or due to system error. Each row lists a single email and the related data.



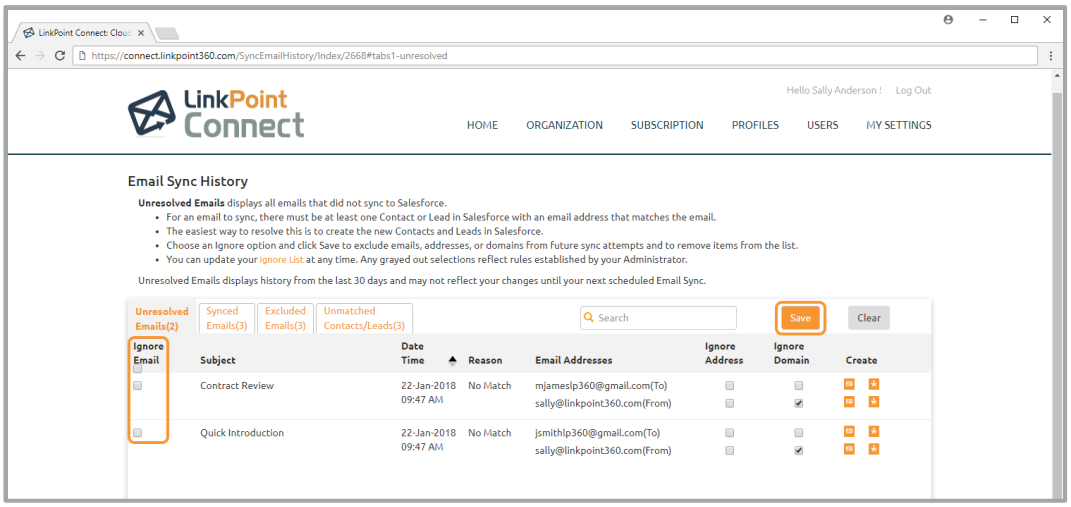
Unresolved Emails	Definition
Ignore Email	Removes an email from this list and no longer attempts to sync it.
Subject	Displays the subject line of the email.
Date Time	Shows when the email was sent/received
Reason	Explains why an email did not sync to Salesforce.
Email Addresses	Displays all email addresses (senders/recipients) on the email.
Ignore Address	Select the checkbox to add the specific email address to the Ignore List. Emails will not sync for this email address in the future. Grayed out selections are applied by your Admin and cannot be overridden.
Ignore Domain	Select the checkbox to add the specific email domain to the Ignore List. Emails will not sync for this email domain in the future. Grayed out selections are applied by your Admin and cannot be overridden.
Create	Select an icon to create a new Contact or Lead record in Salesforce. This will launch Salesforce in a new browser. Creating new leads and contacts will help to resolve emails in future sync attempts.

4 Sort the items by clicking the column headers to view items in ascending or descending order. Search partial or full terms to filter the list and find specific items more quickly.



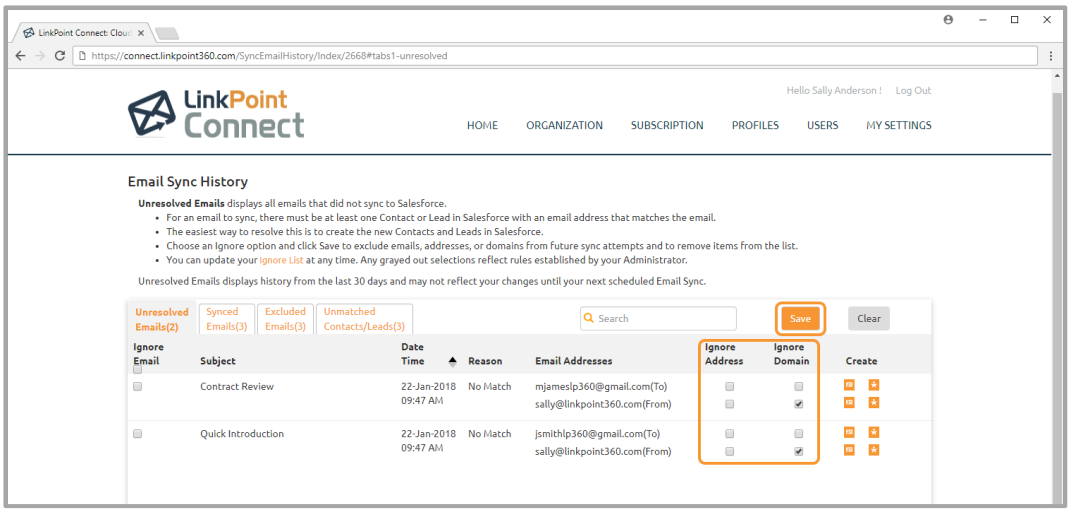
Tip: Emails will be unresolved when no matches are found in Salesforce during the sync. Items remain in this list until an action resolves the sync issue (i.e. adding a matching Contact in Salesforce, changing a sync setting to include the item in the next sync) or until the item exceeds 30 days of sync attempts.

5 Select the **Ignore Email** checkbox to select single or multiple emails. Click **Save** to remove the item(s) from future sync consideration.



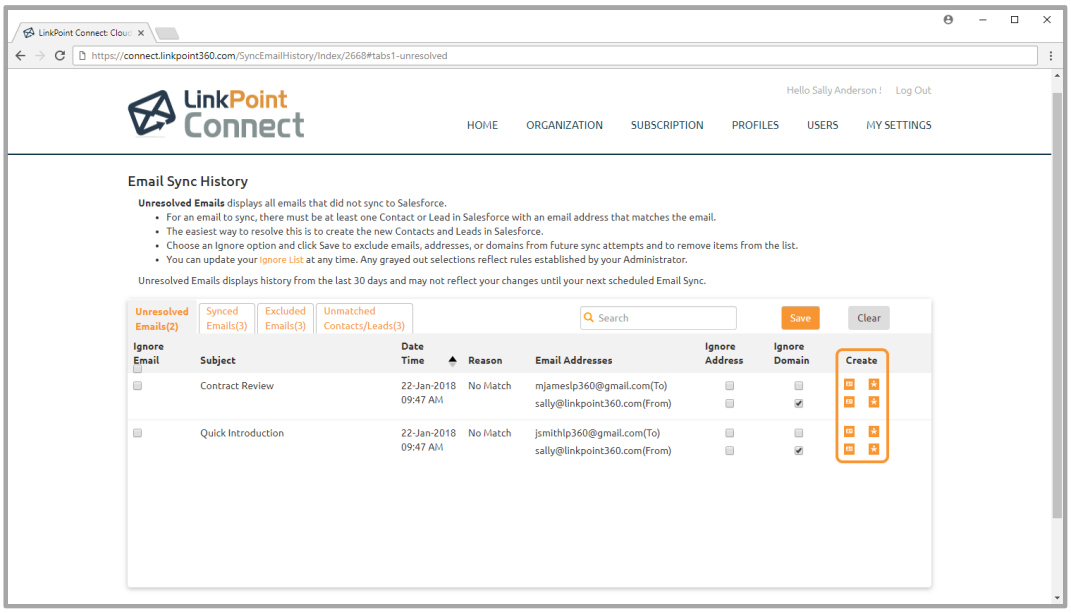
Tip: Email Sync attempts to sync items for up to 30 days from the first time the item is created. Emails in the Unresolved Emails tab that you do not want or need to sync (i.e. emails to/from contacts that you do not intend to add to Salesforce) can be selected and excluded from future sync attempts. This will also remove them from the Unresolved Emails list.

6 Select the **Ignore Address** or **Ignore Domain** checkbox(es) to add email addresses and/or domains to your Ignore List and exclude them from future sync consideration. This is useful for excluding emails from senders that you are certain you do not need to record emails for and/or that do not intend to add to Salesforce. Click **Save** to keep the changes.

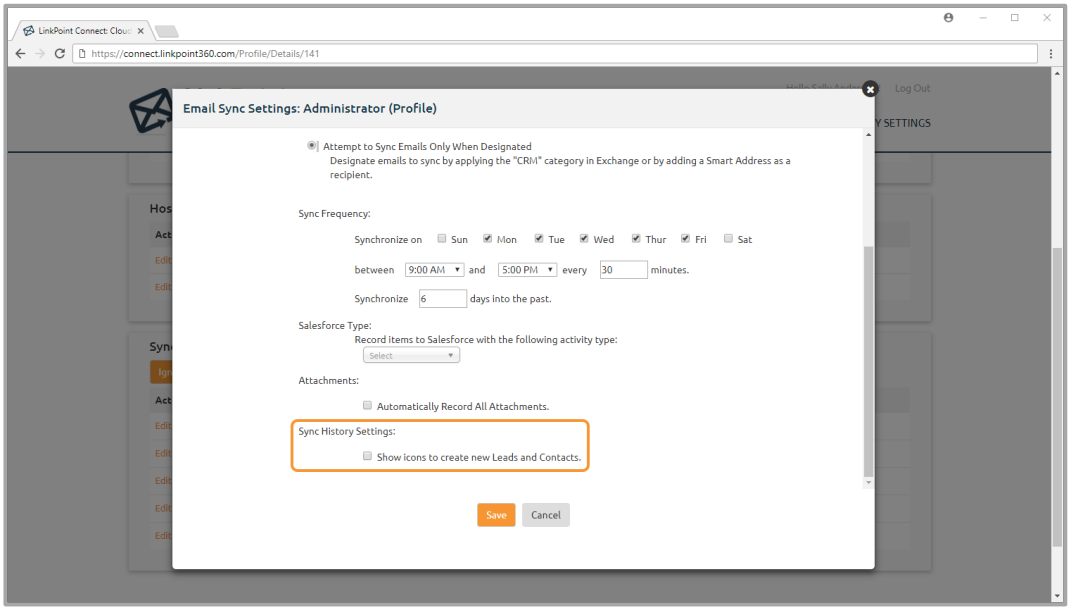


Additional Resources: Learn more about excluding email addresses and domains in the **Configuring the Ignore List** section of this User Guide.

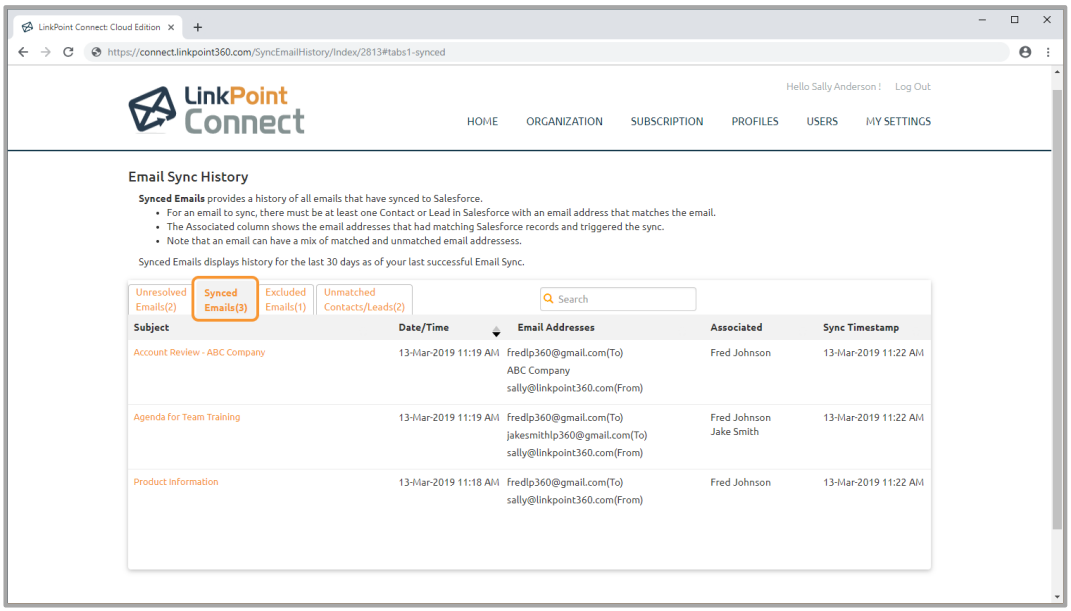
7 Select a **Create** icon for Contact or Lead to enter a new record in Salesforce. This will launch Salesforce in a new browser window. Creating new leads and contacts will help to resolve emails in future sync attempts.



Tip: Admins can disable the Create icons for Leads and Contacts. Navigate to the Email Sync Job Edit window on the Subscription or Profile levels and deselect the **Sync History Settings:** option to **Show icons to create new Leads and Contacts.**



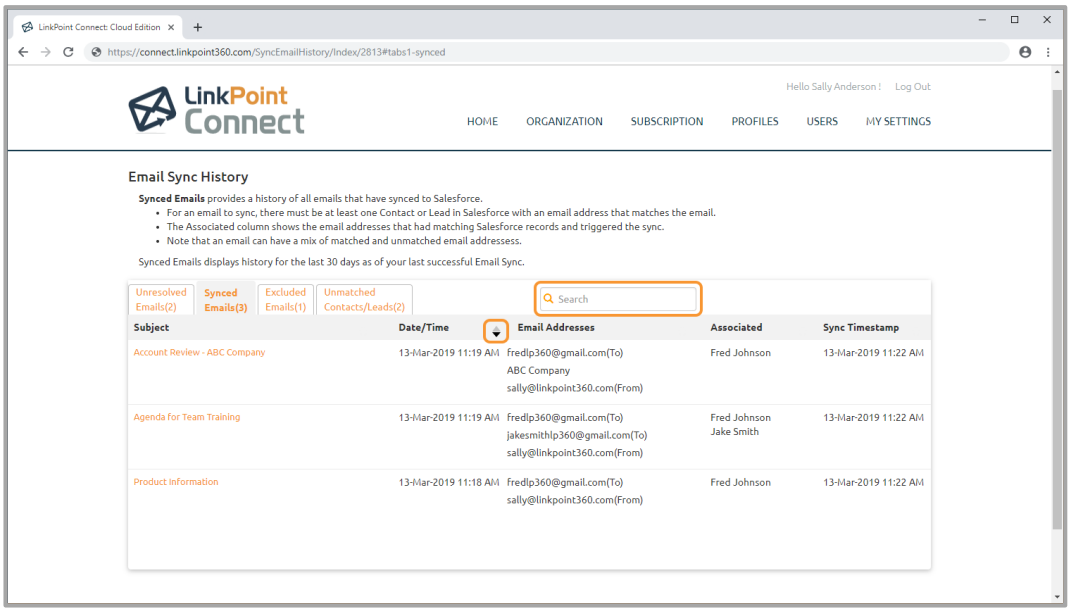
8 Select the **Synced Emails** tab to view all of the emails that synced based on the established sync settings. Each row lists a single email and the related data.



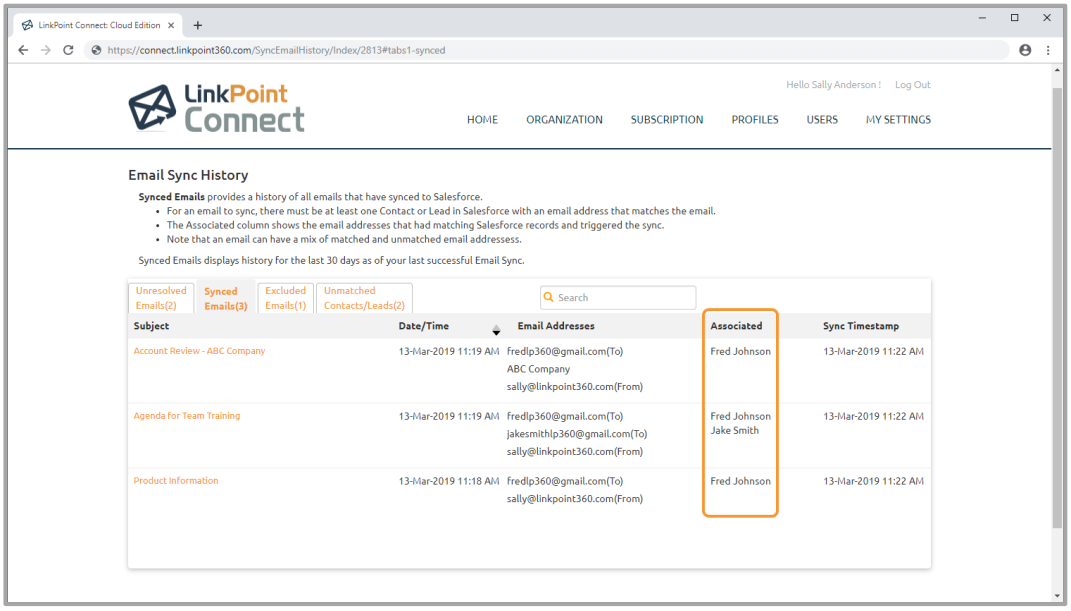
Synced Emails	Definition
Subject	Displays the subject line or title of the email. Click to view the recorded item in Salesforce.
Date/Time	Shows when the email was sent/received.
Email Addresses	Displays all email addresses (senders/recipients) on the email.
Associated	Indicates the matching Salesforce record(s) the email has been recorded to, where applicable.
Sync Timestamp	Shows when the email synced to Salesforce

Tip: Emails with at least once matching Contact or Lead record in Salesforce will appear in the Synced Emails tab unless they were excluded (i.e. Do Not Sync Category) or if an item could not sync due to an error. An email only requires one email address to match with a Salesforce record to be considered synced. Items remain in this list for review for 30 days.

9 Sort the items by clicking the column headers to view in ascending or descending order. Search partial or full terms to filter the list and identify specific items more quickly.



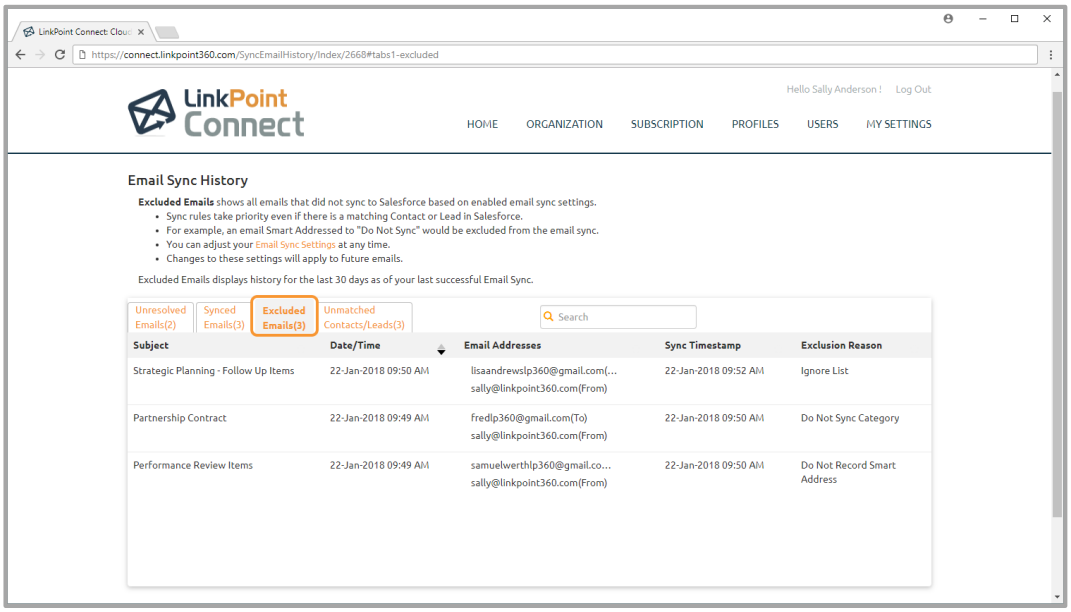
Tip: Email addresses for which there is a matching Salesforce record and that the system was able to record the item to are marked with the name of the Salesforce record under the **Associated** column.



Tip: Previously synced emails that have been deleted as a result of a sync function are listed in the Email Sync History under the Synced Tab. The word "Deleted" is added to the end of the Subject line, and the hyperlink to Salesforce to view the synced email has been removed. This indicates to the end user that the email did successfully sync but has since been deleted from the CRM. Items that are manually deleted by a user in both Exchange and Salesforce remain listed in the Sync History as a record of past sync behavior

Warning: Salesforce includes several limitations regarding how items can be recorded to multiple Salesforce records. When working with multiple leads or a mix of leads and contacts, items will only sync based on established Salesforce allowances. In these cases, Cloud Edition will indicate all records where the item was recorded with a green checkmark. However, there may be matching Salesforce records that the system was not permitted to record to due to the Salesforce restrictions.

10 Select the **Excluded Emails** tab to view all of the calendar items that were excluded from syncing based on the established sync criteria. Each row lists a single email and the related data.

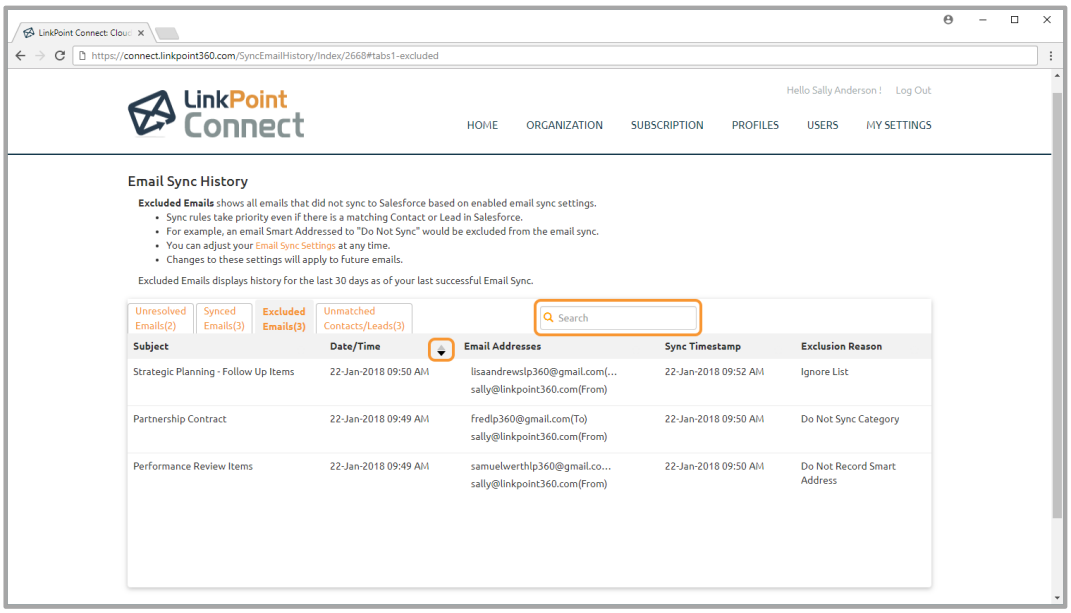


Excluded Emails	Definition
Subject	Displays the subject line of the email.
Date/Time	Shows when the email was sent/received.
Email Addresses	Displays all email addresses (senders/recipients) on the email.
Sync Timestamp	Shows when the email sync rules excluded the item from syncing to Salesforce.
Exclusion Reason	Indicates the sync criteria that excluded the email from syncing.

Tip: Different sync settings include different criteria that prevent items from syncing. For example, when selecting the option to *Attempt to Sync Emails Only When Designated*, emails with a CRM category but where there are no matching email addresses in Salesforce will not sync. Users can also proactively exclude emails from syncing by adding a DoNotSync Category or Do Not Record Smart Address. Items remain in this list for review for 30 days.

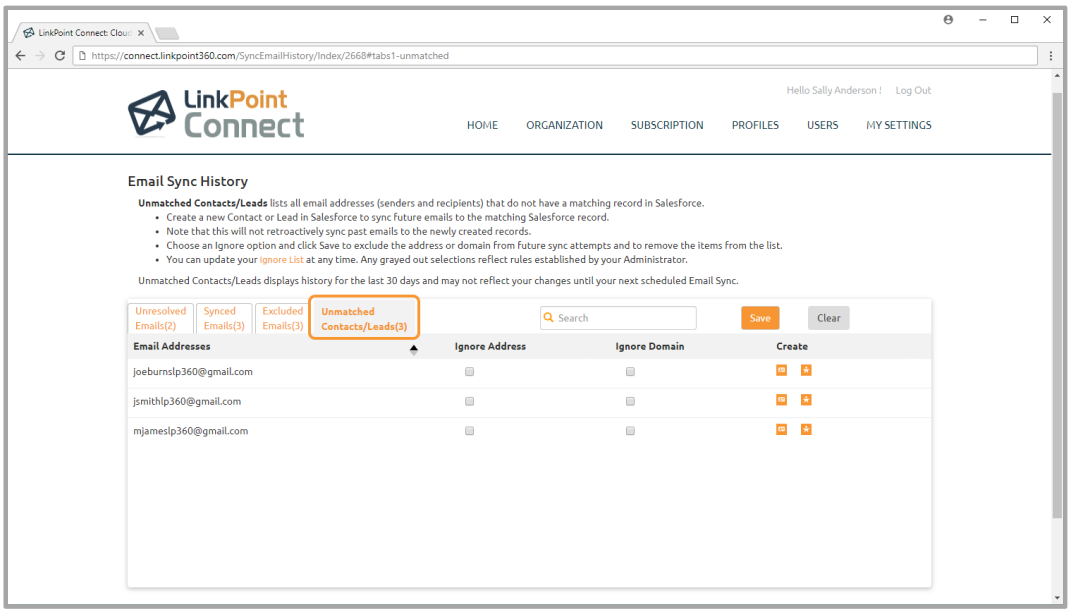
Tip: Email addresses and domains included in the Global Exclusion List by an Admin are completely omitted from the sync process and do not appear in the Sync History.

11 Sort the items by clicking the column headers to view items in ascending or descending order. Search partial or full terms to filter the list and find specific items more quickly.



Tip: Items that do not sync due to Prevent Operations settings will not appear in the Email Sync History since the system completely ignores those items when created, updated, or deleted, as specified.

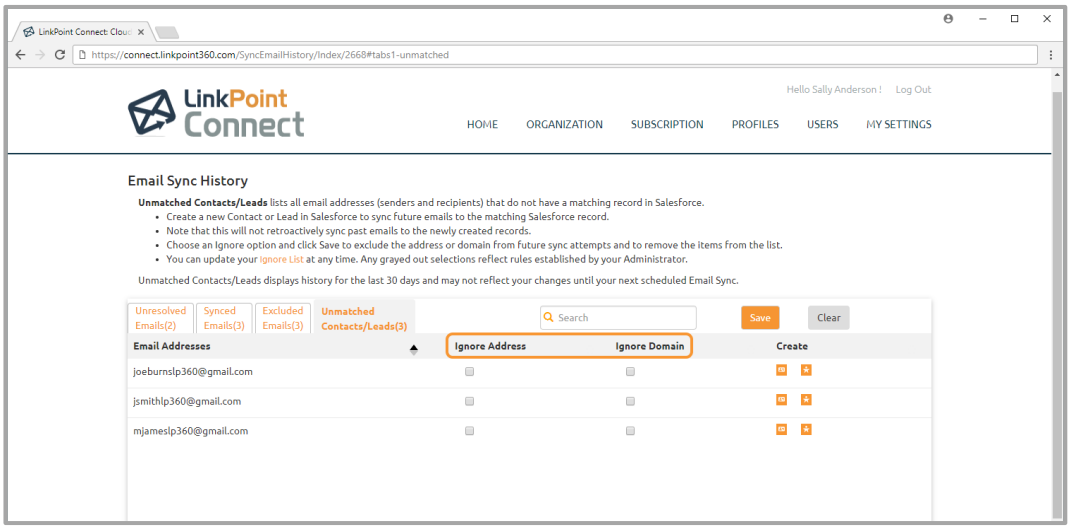
12 Select the **Unmatched Contacts/Leads** tab to view a list of all email addresses extracted from emails that do not have a matching Contact or Lead record in Salesforce.



Unmatched Contacts/Leads	Definition
Email Addresses	Shows email addresses that do not have matching Salesforce records.
Ignore Address	Adds the selected email address to your Ignore List to exclude from future syncs. Grayed out selections are applied by your Admin and cannot be overridden.
Ignore Domain	Adds the selected email domain to your Ignore List to exclude from future syncs. Grayed out selections are applied by your Admin and cannot be overridden.
Create	Select an icon to create a new Contact or Lead record in Salesforce. This will launch Salesforce in a new browser. Creating new leads and contacts will help to resolve calendar items in future sync attempts.

Tip: This screen is designed to make it easier for users to see which email addresses have not been added to Salesforce. For sync modes where matches are required, leaving numerous email addresses with no Salesforce match will result in a large number of unresolved or excluded items. This tab enables users to create records or to exclude email addresses and domains from future consideration with ignore settings. Creating a new Contact or Lead in Salesforce will enable the system to sync future emails. Note that this will not retroactively sync past emails to the newly created records. Items remain in this list for review for 30 days.

13 Select the **Ignore Address** or **Ignore Domain** checkbox(es) to add email addresses and/or domains to your Ignore List and exclude those items from future sync consideration. This is useful for excluding emails from senders that you are certain you do not need to record emails for and/or that do not and will not exist in your instance of Salesforce.

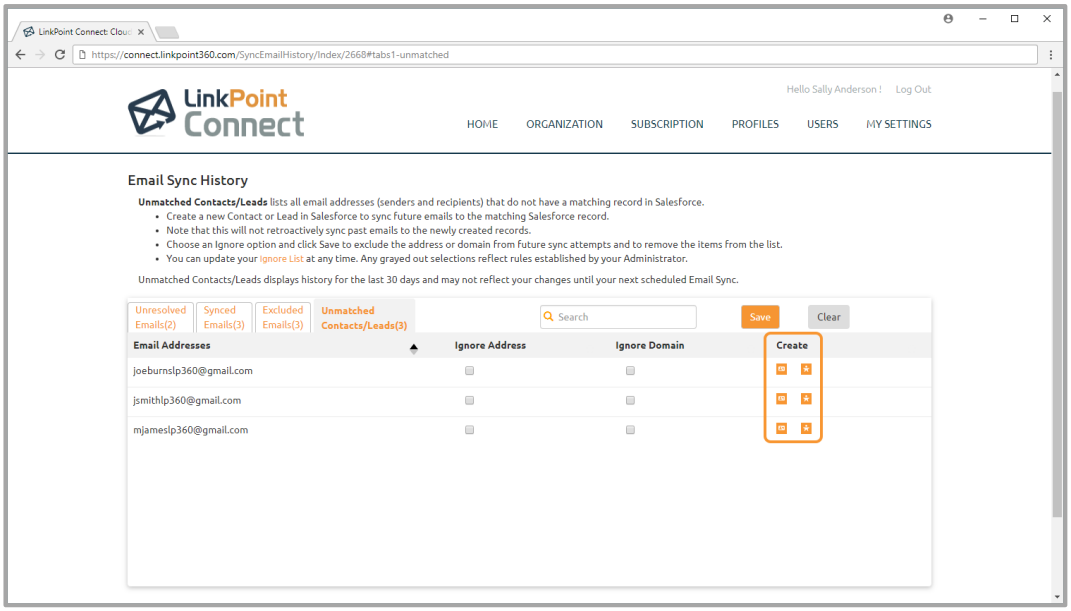


Tip: Email Sync attempts to sync items for up to 30 days from the first time the item is created. Unmatched Contacts or Leads that you do not intend to add to Salesforce can be selected and excluded from future sync attempts.

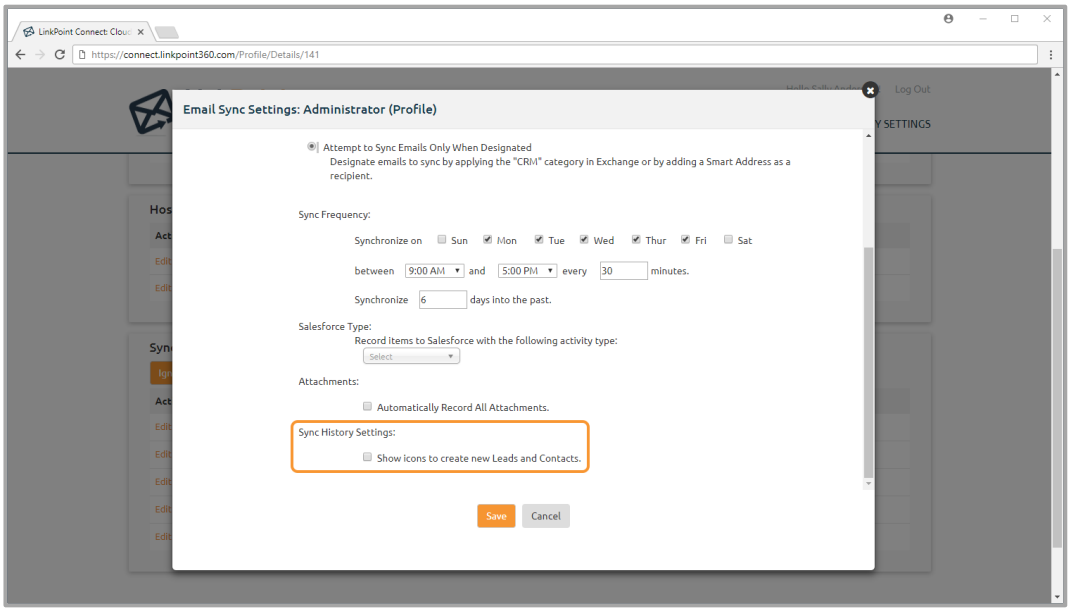
Tip: Items related to an email address or domain placed on the Global Exclusion List by an Admin will not appear in the Email Sync History since the system completely ignores those items.

Additional Resources: Learn more about excluding email addresses and domains in the **Working with Ignore Lists** section of this User Guide.

14 Select a **Create** icon for Contact or Lead to enter a new record in Salesforce. This will launch Salesforce in a new browser window. Creating new leads and contacts will help to resolve emails in future sync attempts.



Tip: Admins can disable the Create icons for Leads and Contacts. Navigate to the Email Sync Job Edit window on the Subscription or Profile levels and deselect the **Sync History Settings:** option to **Show icons to create new Leads and Contacts.**



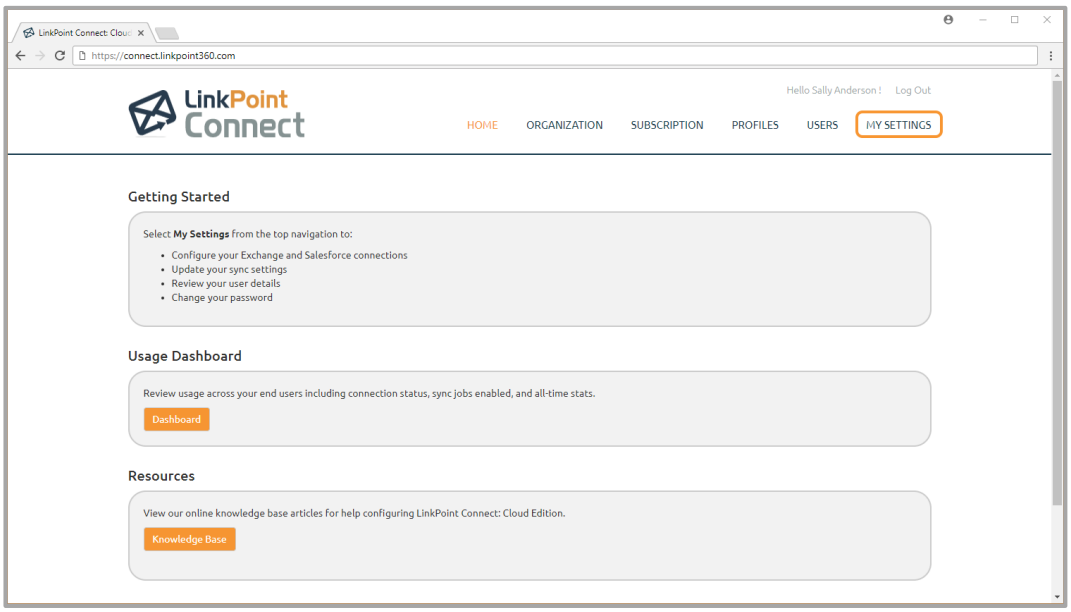
Syncing Tasks

Configuring Task Sync Jobs

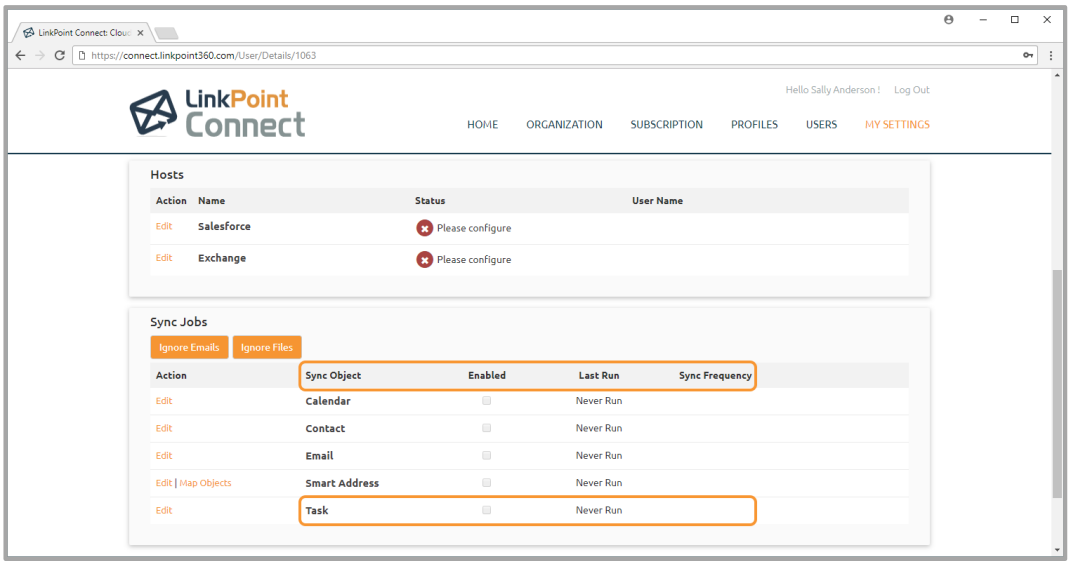
Cloud Edition includes a variety of flexible synchronization settings for managing the flow of data between Microsoft Exchange and Salesforce task lists. Before enabling Task Sync, it is important for users to become familiar with the available Cloud Edition sync settings. The synchronization of emails, calendars, contacts, and tasks works similarly but can be managed separately based on user preference. In this section, you will learn how to access and alter the task sync settings available with Cloud Edition.

Tip: Admins have the ability to set default sync settings and/or lock down these settings to prevent end user override. Your instance of Cloud Edition may not allow you to change any/all of the settings described in this section, depending on how your Admin has configured your access. Settings that are preset and locked by an Admin are visible to end users but are grayed out and cannot be edited.

1. Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.

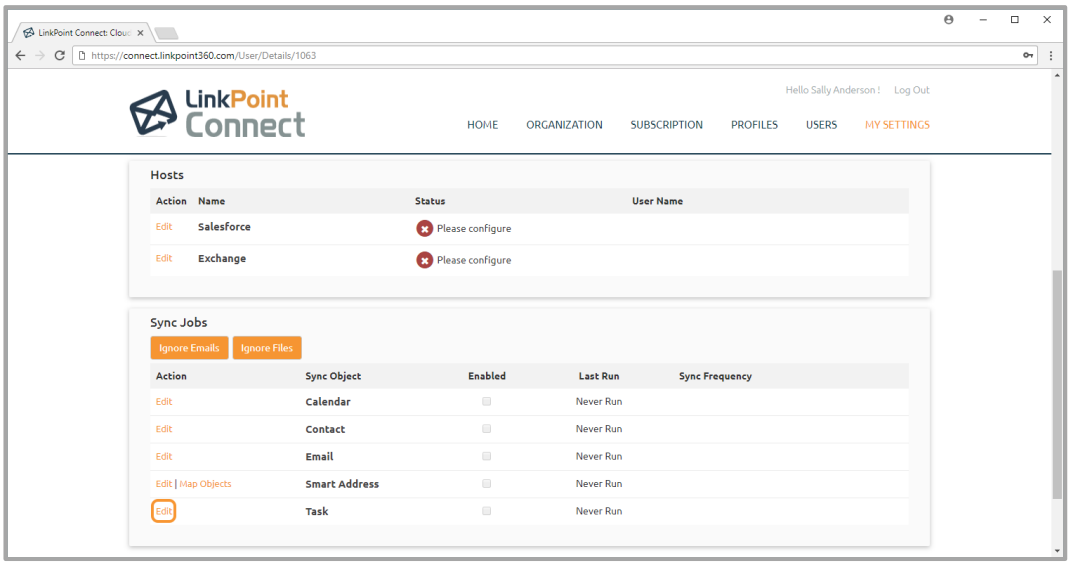


2 Locate the **Sync Jobs** section and note the information displayed for the **Task Sync Object**. At a glance, users can see whether the Task Sync is **Enabled**, when the sync was **Last Run**, and the configured **Sync Frequency**.



Tip: The first time you set up your Task Sync, the **Enabled** checkbox will be deselected, the **Last Run** date and time will be listed as **Never Run**, and the **Sync Frequency** will be blank.

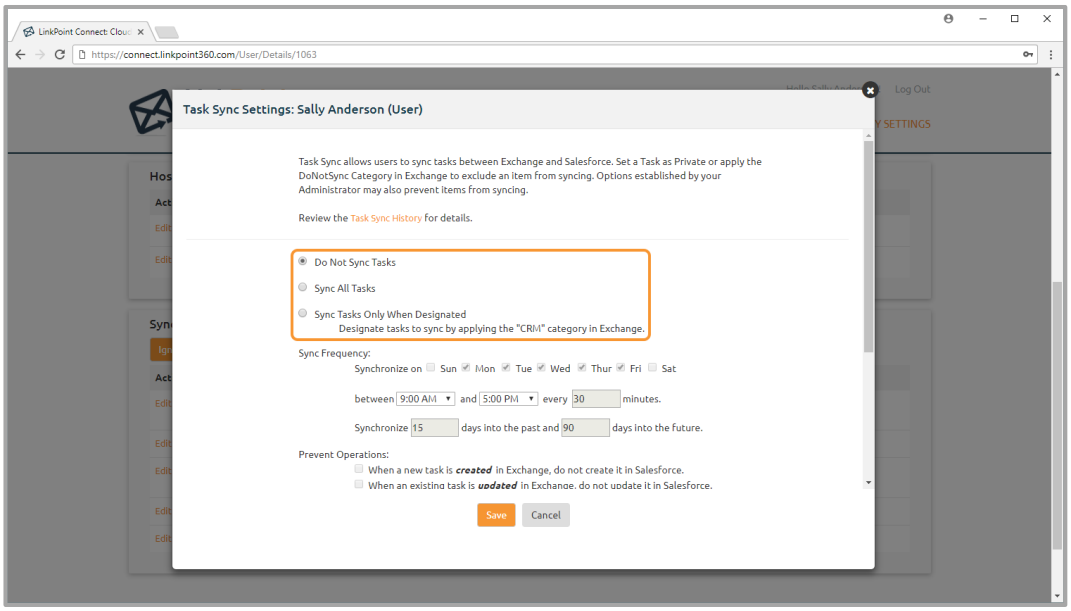
3 Select the **Edit** link for the **Task Sync Object** to view the available sync options.



Tip: To review the sync settings without making changes, you can select **Task** to open the Task Sync Settings window. This will show all of the settings as read only. You can click the **Edit** button to make changes to the settings if needed.

4 Select a sync option to enable Task Sync. Note that there are three modes to choose from based on how you would like the data to be handled.

- Do Not Sync Tasks:
  Disable Task Sync. Task Sync is off by default for all new accounts and new users.
- Sync All Tasks:
  Enable Cloud Edition to sync all of your tasks between systems.
- Sync Tasks Only When Designated:
  Enable Cloud Edition to sync only the tasks you opt into the sync. Designate Tasks to sync by applying a CRM Category in Exchange. Note that all tasks created in Salesforce will sync to Exchange regardless of designation.



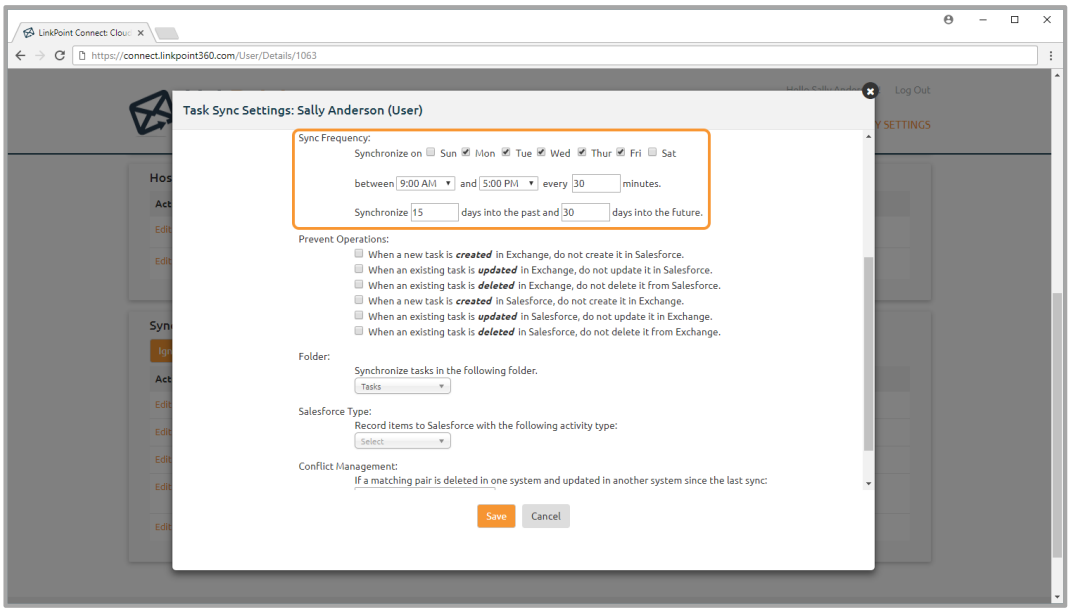
Warning: If you enable Designate mode and run your sync, the items without a designation during the sync attempt will be excluded.

Tip: If an option other than **Do Not Sync Tasks** is already selected for you, your Admin may have preconfigured the setting. If you are not able to change the setting selection, your Admin may have locked down the setting.

Tip: There are several ways to exclude a task from syncing.

- Set a task to *Private* in Exchange.
- Add an Exchange Category with the name *DoNotSync* to the task.

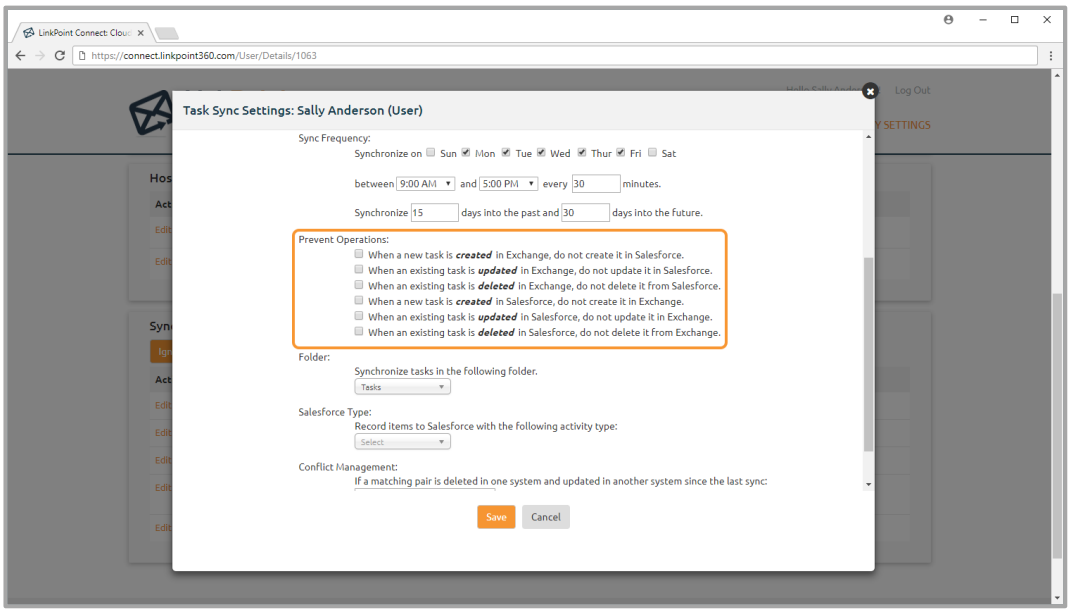
5 Enter the preferred **Sync Frequency** in the provided fields. Select the day and time range during which you want the sync to run. Note that these times will be based on the time zone you set for your user account.



Tip: The maximum sync frequency cannot exceed 30 minutes. Users cannot sync more than 30 days of past events or more than 365 days of future events.

Warning: The Past and Future Days ranges for Task Sync limit the range for Tasks that have a Due Date. All Tasks without a Due Date will sync regardless of the range you specify in the Task Sync Settings.

6 Set your **Prevent Operations** preferences. Indicate whether Cloud Edition should create, update, or delete items in Salesforce or Exchange for new and existing tasks.

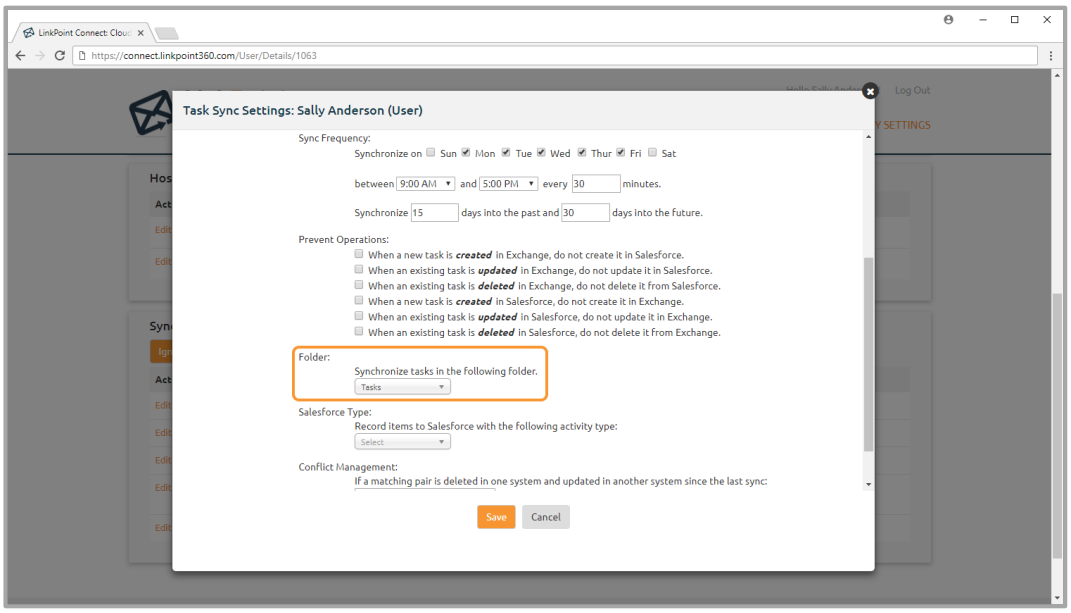


Tip: Users can prevent Cloud Edition from creating, updating, or deleting items regardless of any Salesforce settings. Users can set this individually for Salesforce and Exchange, effectively creating bidirectional or one-way sync rules.

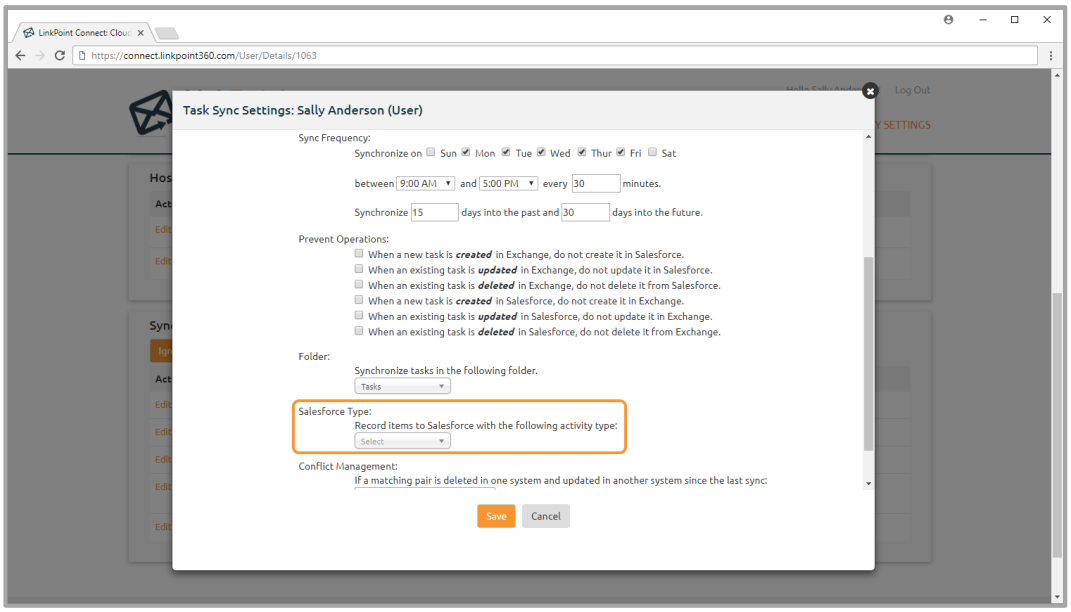
Warning: Prevent Operations settings override any selections you make for CRM category. For example, choosing prevent a task from being created in Salesforce and then tagging that item with a CRM category in Exchange will result in the item not syncing to Salesforce.

Tip: If you enable a Prevent Operations option and run your sync, the items included in the sync attempt will be excluded moving forward.

7 Change the **Folder** to map the sync to a different Exchange Task folder. The default selection will be your main task folder.

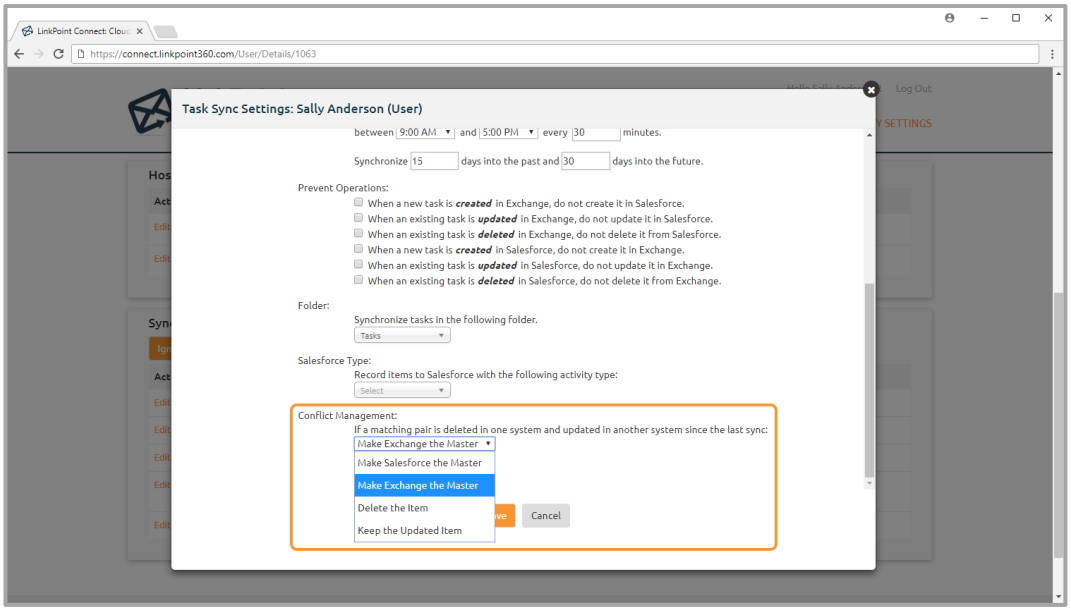


8 Choose a **Salesforce Type** to record emails to Salesforce with a default Activity Type. If no selection is made, the system will use the Salesforce default.



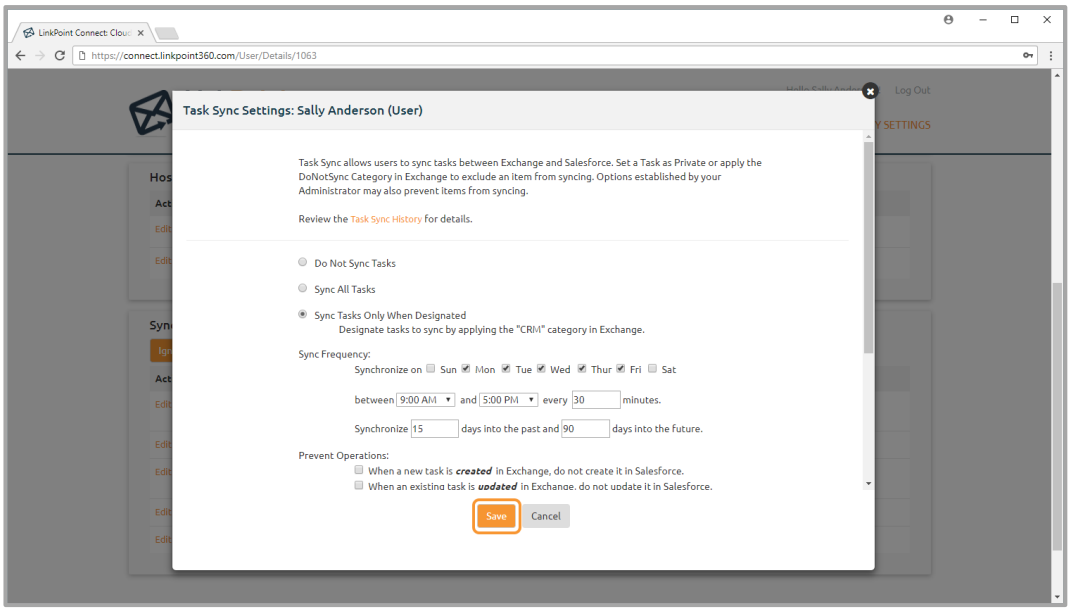
9 Set the **Conflict Management** rule for when an item is deleted in one system but updated in another system since the last sync.

- **Make Salesforce the Master:** The action that occurred in Salesforce applies to the Exchange version of the item.
  - For example, if the item is deleted in Exchange and updated in Salesforce, the item will be updated in both systems (not deleted).
- **Make Exchange the Master:** The action that occurred in Exchange applies to the Salesforce version of the item.
  - For example, if the item is deleted in Salesforce and updated in Exchange, the item will be updated in both systems (not deleted).
- **Delete the Item:** If the item is deleted in one system, it will be deleted from the other as well.
  - For example, if the item is deleted in Exchange and updated in Salesforce, the item will be deleted in both systems (not updated).
- **Keep the Updated Item:** If the item is updated in one system, it will be updated in the other as well.
  - For example, if the item is updated in Salesforce and deleted in Exchange, the item will be updated in both systems (not deleted).

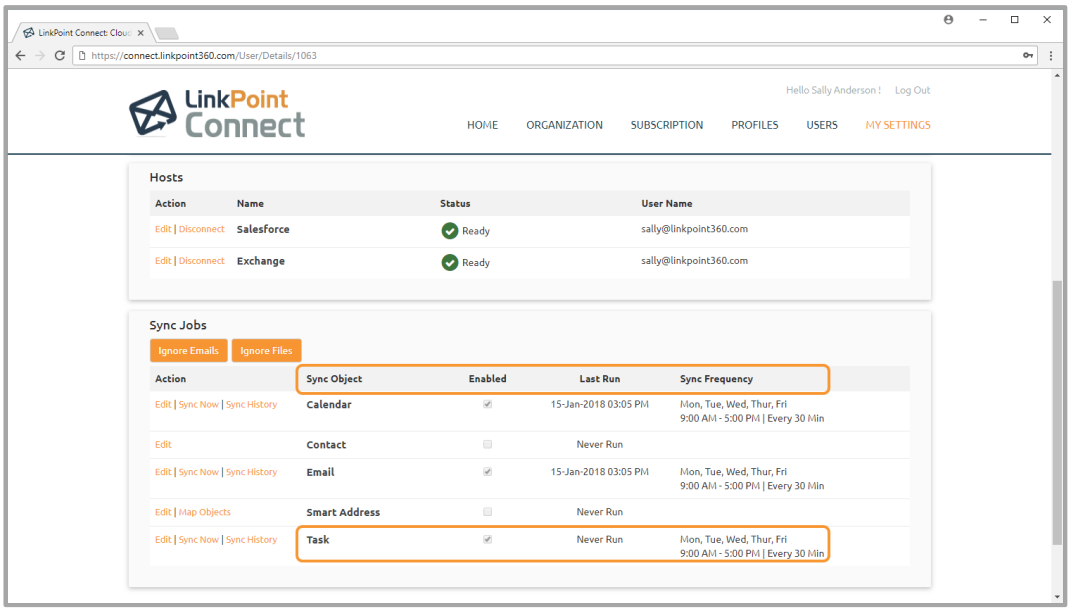


Warning: Prevent Operations settings override any selections you make for the Conflict Management rule. For example, choosing prevent a task from being deleted in Exchange and then selecting the Conflict Management rule *Delete Wins* will result in the item not being deleted from Exchange.

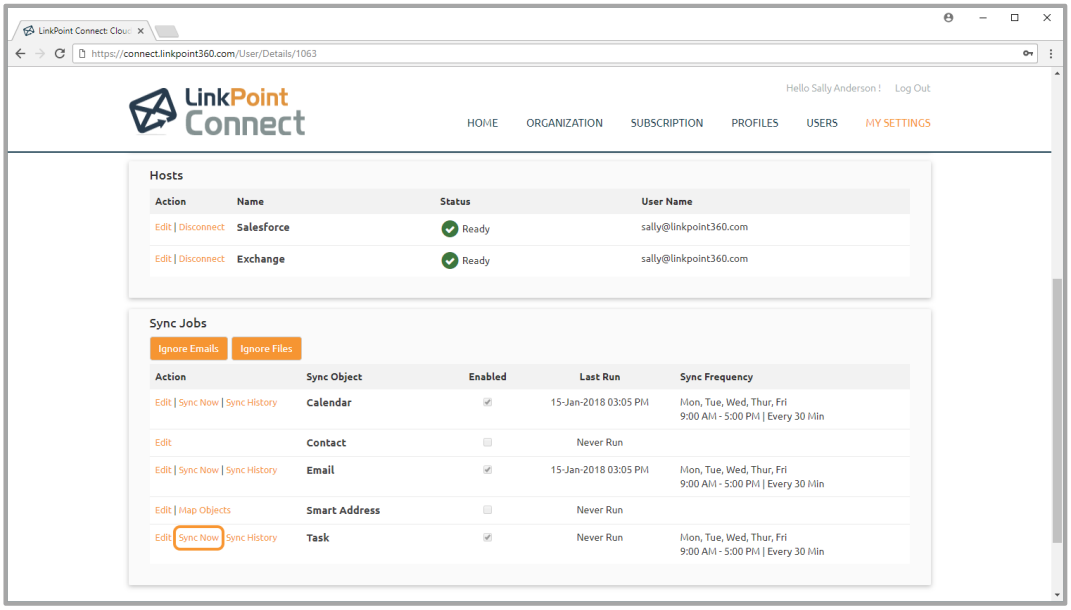
10 Click the **Save** button when finished. Then close the **Task Sync Settings** window.



11 The Task Sync will run immediately after it is enabled. The Sync Jobs will show the last run date and time and will reflect the Sync Frequency that was selected when editing the sync.



Tip: To run the Task Sync again, you can click the **Sync Now** option. This will place the Sync Job in the queue for processing. This does not mean that the sync immediately runs. The process can take several minutes depending on the amount of data that meets the sync criteria. To click **Sync Now** again, refresh the page.



Tip: Tasks that sync to Salesforce will be marked with a CRM category in Microsoft Outlook. This feature is not available for mobile users.

Warning: During the sync, all fields (excluding Body and Subject) that are created or updated in Salesforce are validated for maximum length requirements and truncated according to Salesforce limits. Items with Subjects that exceed the maximum length requirements in Salesforce will not sync. By default, tasks with Body character counts that exceed the maximum length requirements in Salesforce will be truncated to fit in the space permitted.

Tip: Task Sync supports the Status field for Exchange and Salesforce. Where available matching statuses exist in both systems, Cloud Edition will sync the Task and update the Task Status accordingly. Task statuses in Exchange are not customizable, but Salesforce Task Status fields often have custom values.

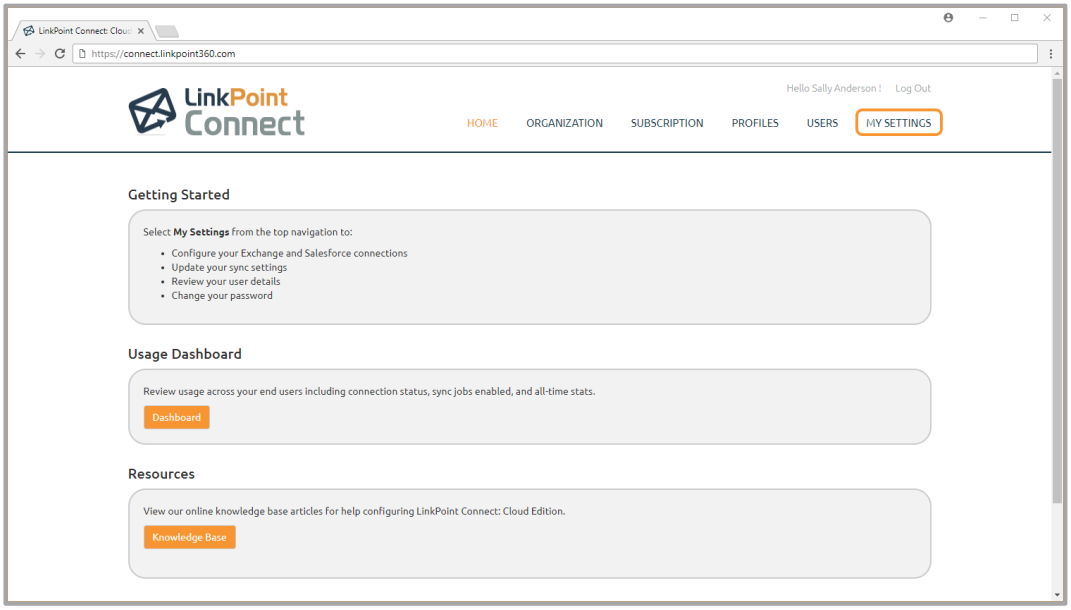
Tasks with a custom status in Salesforce that sync to Exchange are displayed with the Exchange default status of “Not Started”. When the item syncs back to Salesforce, the default Exchange value is ignored, and the task in Salesforce retains the original custom status. To change the status of a task that included a custom status from Salesforce, users must update the status field in Salesforce.

Reviewing Task Sync History

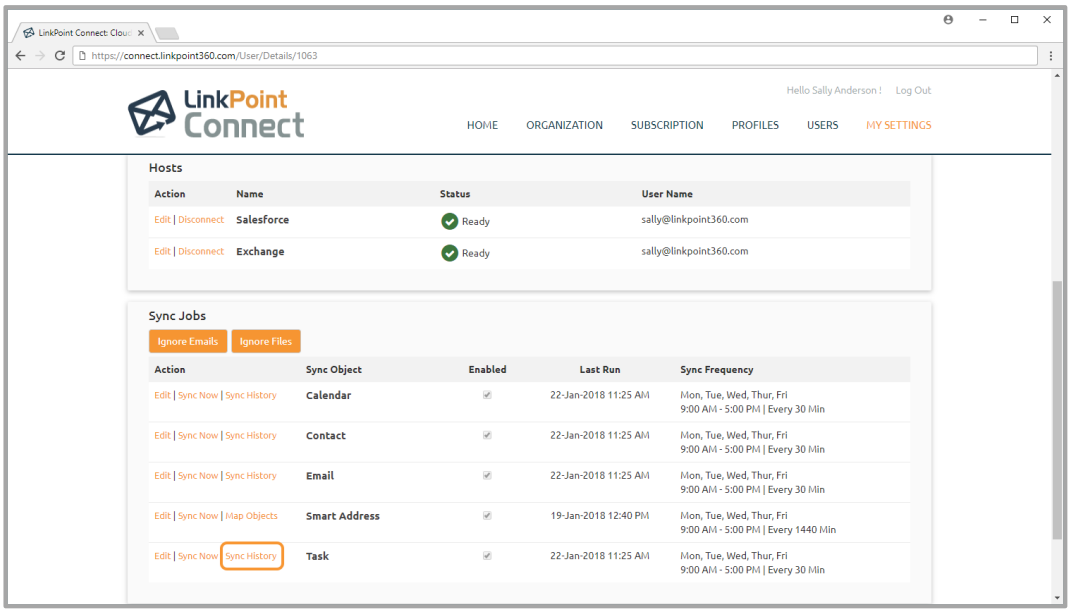
Cloud Edition Task Sync ensures the movement of data between Exchange and Salesforce based on preconfigured sync settings. Users can review how tasks were synced between systems by reviewing the Task Sync History. This is especially helpful to confirm sync behavior and to review items that were excluded from the sync based on rules or missing Salesforce data. In this section, you will learn how to review the data presented in the Task Sync History.

Warning: Sync History retains user data for 30 days. The Sync History will be rebuilt for users who disconnect their Exchange or Salesforce hosts and reconnect with new details. This ensures that users are viewing the history for the current configuration.

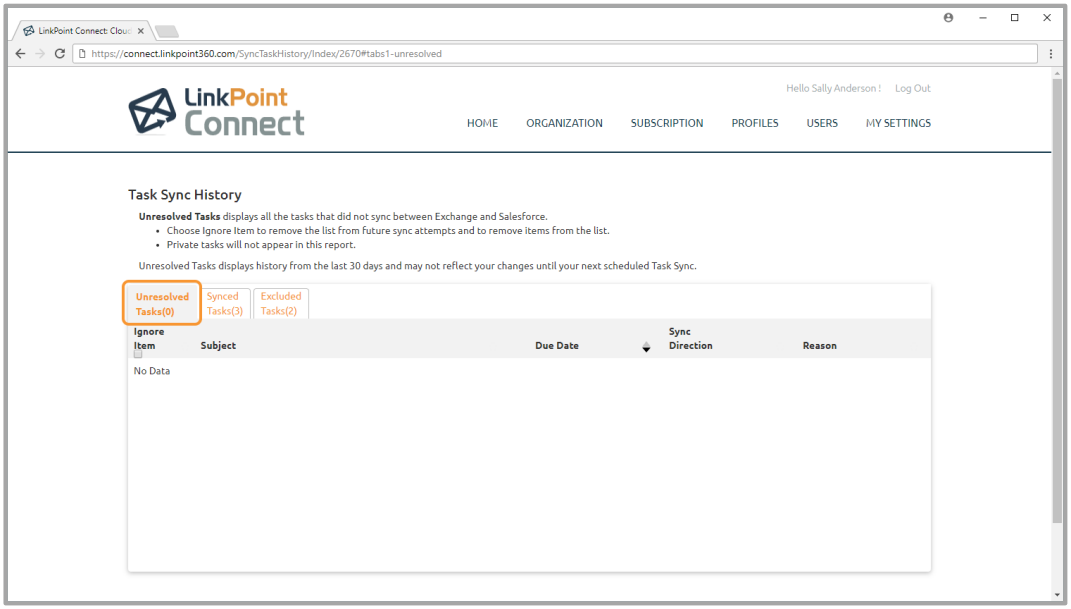
1. Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.



2 Locate the **Task Sync Object** in the **Sync Jobs** section and select the **Sync History** link.



3 Review the **Unresolved Tasks** tab to view all of the tasks that did not sync due to system error. Each row lists a single Task and the related data.

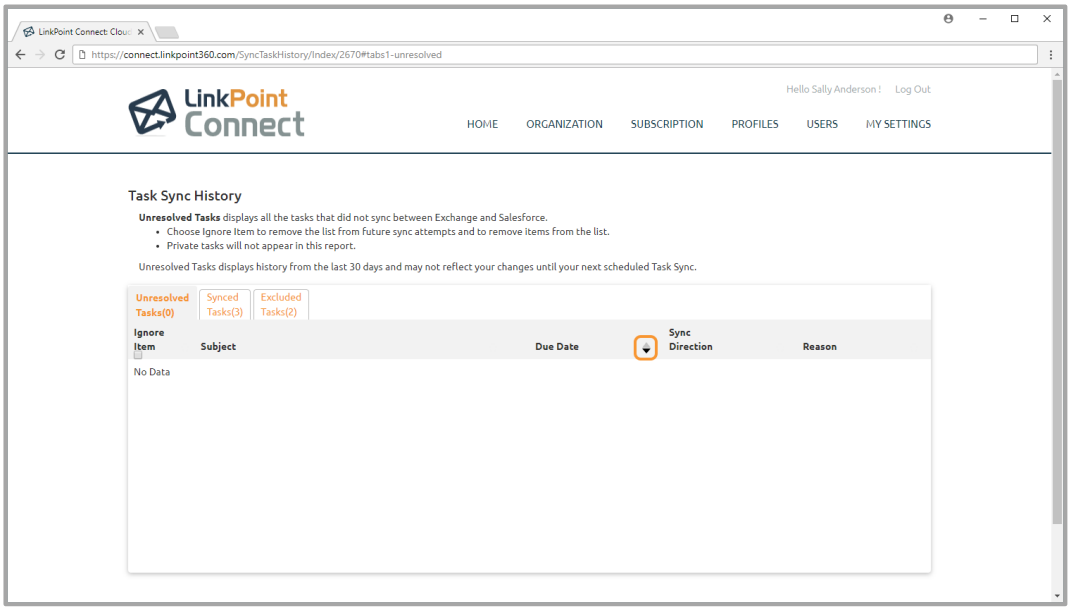


Unresolved Tasks	Definition
Ignore Item	Removes a Task from this list and no longer attempts to sync it.
Subject	Displays the subject line of the Task.
Due Date	Shows when the Task is due.
Sync Direction	Indicates whether the item was created in Outlook and attempted to sync to Salesforce or created in Salesforce and attempted to sync to Outlook.
Reason	Explains why the Task did not sync between systems.

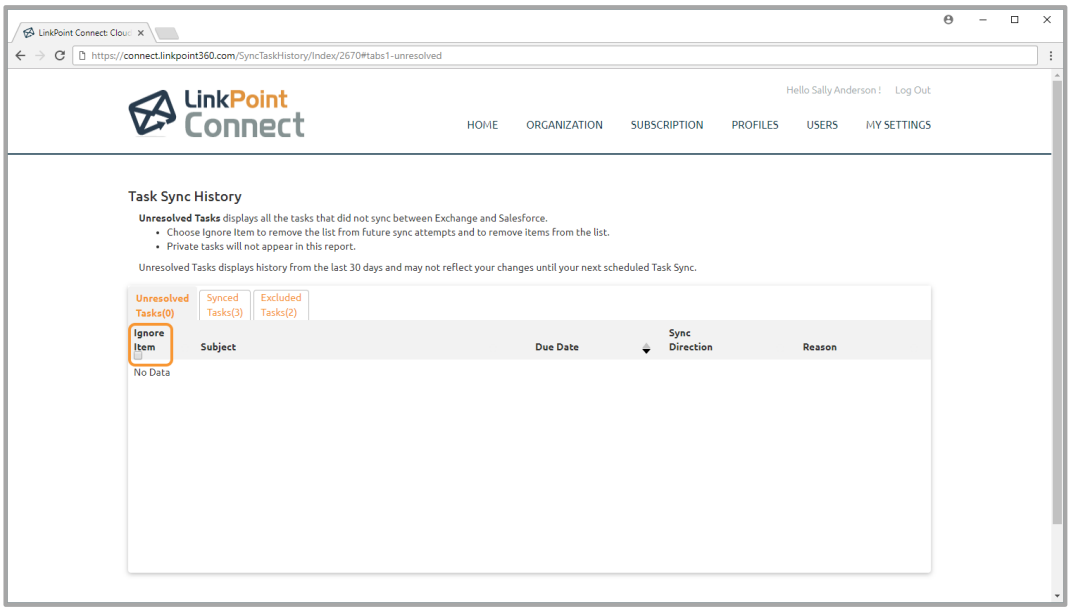
Tip: The Unresolved Tasks tab will be blank unless an item could not sync due to an error. Task Sync does not require matching Salesforce records in order to sync. Items remain in this list until an action resolves the sync issue (i.e. the error has been resolved) or until the item exceeds 30 days of sync attempts.

Tip: Tasks with no Due Date will be listed with a blank Due Date throughout the Sync History.

4 Sort the items by clicking the column headers to view items in ascending or descending order.

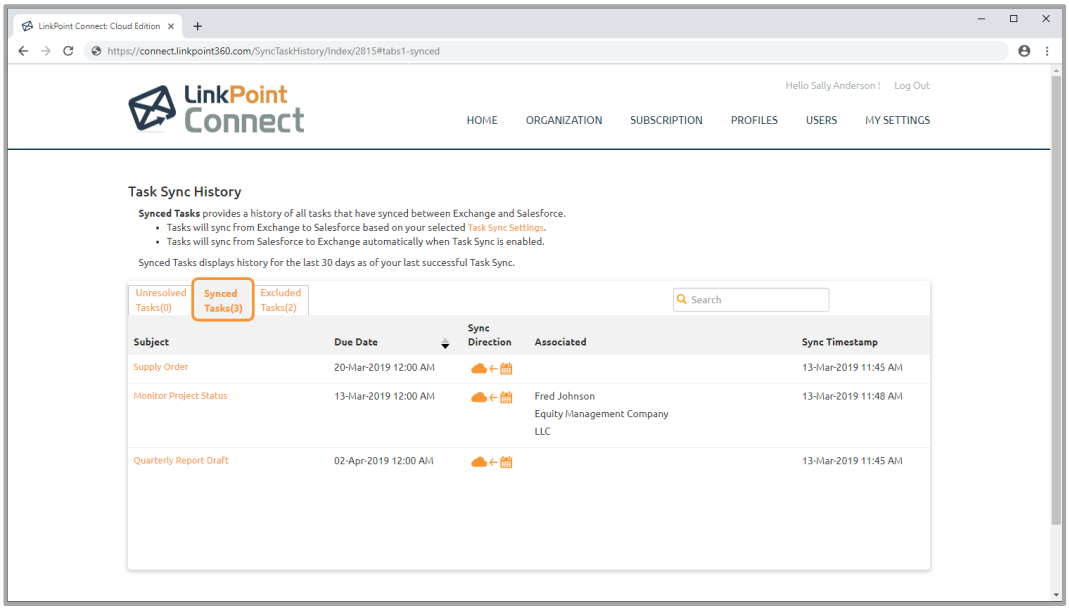


5 Select the **Ignore Item** checkbox to select single or multiple tasks. Click **Save** to remove the item(s) from future sync consideration.



Tip: Task Sync attempts to sync items for up to 30 days from the first time the item is created. Tasks in the Unresolved Tasks tab that you do not want or need to sync can be selected and excluded from future sync attempts. This will also remove them from the Unresolved Tasks list.

6 Select the **Synced Tasks** tab to view all of the tasks that synced based on the established sync settings. Each row lists a single task and the related data.

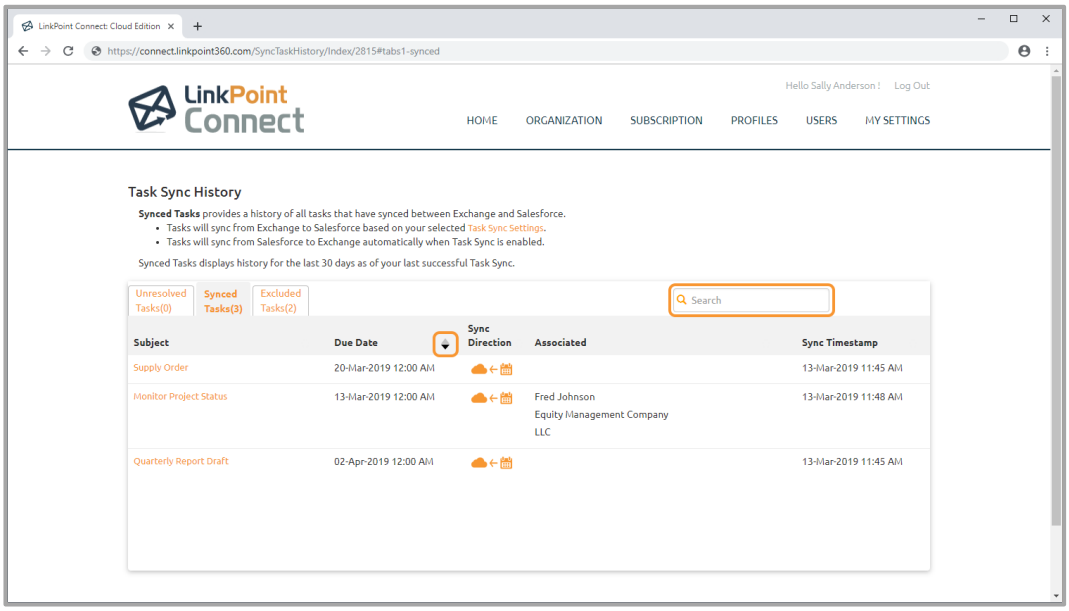


Synced Tasks	Definition
Subject	Displays the subject line of the Task. Click to view the item in Salesforce.
Due Date	Shows when the Task is due.
Sync Direction	Indicates whether the item was created/updated in Outlook and attempted to sync to Salesforce or created/updated in Salesforce and attempted to sync to Outlook.
Associated	Indicates the matching Salesforce record(s) the task has been recorded to, where applicable.
Sync Timestamp	Shows the date and time that the item synced.

Tip: All tasks that met the sync criteria will be listed in the Synced tab unless they were excluded (i.e. Do Not Sync Category) or if an item could not sync due to an error. Items remain in this list for review for 30 days.

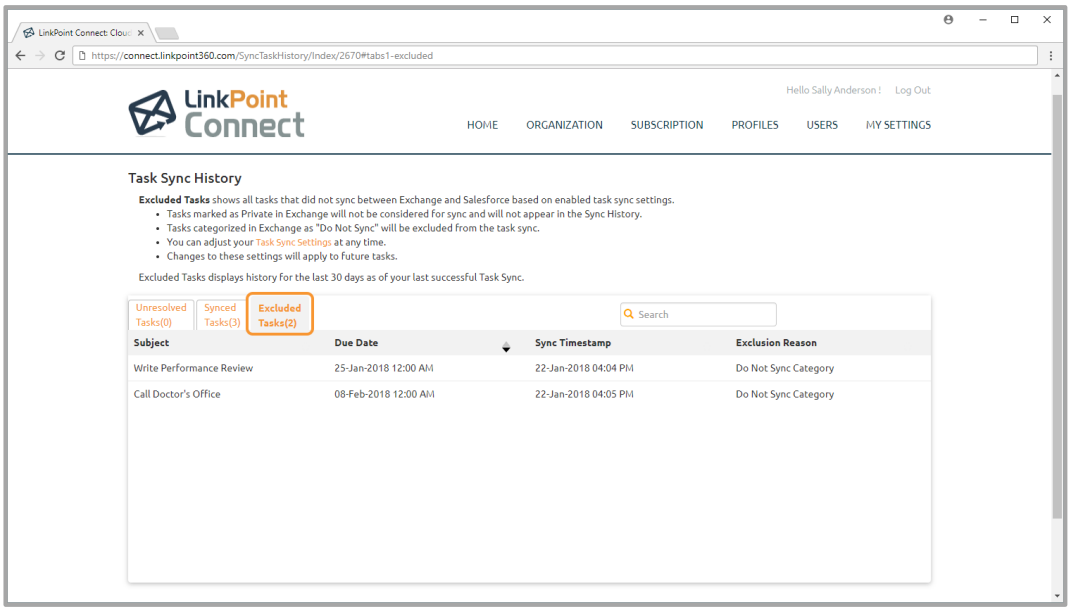
Tip: Task Sync does not relate items to Salesforce records for items created in Exchange. Any Tasks created in Salesforce and related to a record will retain that relationship during the sync. However, users will not be able to view the related records when viewing the Task in Exchange.

7 Sort the items by clicking the column headers to view in ascending or descending order. Search partial or full terms to filter the list and identify specific items more quickly.



Tip: Tasks that are associated with a Salesforce record will list the name of the record in the Associated column. This applies to tasks that originate in Salesforce. Tasks that originate in Exchange and are not tied to a record once they sync to Salesforce will have a blank value in the Associated column.

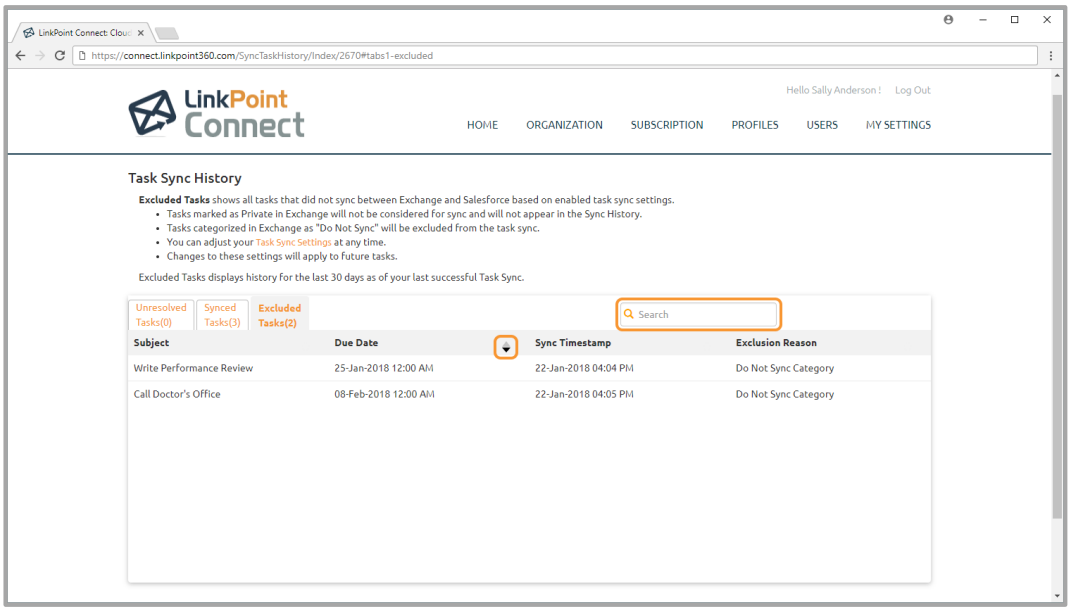
8 Select the **Excluded Tasks** tab to view all of the tasks that were excluded from syncing based on the established sync criteria. Each row lists a single task and the related data.



Excluded Tasks	Definition
Subject	Displays the subject line of the Task.
Due Date	Shows when the Task is due.
Sync Timestamp	Shows when the task sync rules excluded the item from syncing to Salesforce.
Exclusion Reason	Indicates the sync criteria that excluded the task from syncing.

Tip: Different sync settings include different criteria that prevent items from syncing. Users can also proactively exclude items from syncing by setting the task to Private in Outlook or by adding a Do Not Sync Category. Items remain in this list for review for 30 days. Note that Private items will not appear in the Sync History.

9 Sort the items by clicking the column headers to view items in ascending or descending order. Search partial or full terms to filter the list and find specific items more quickly.



Tip: Items that do not sync due to Prevent Operations settings will not appear in the Task History since the system completely ignores those items when created, updated, or deleted, as specified.

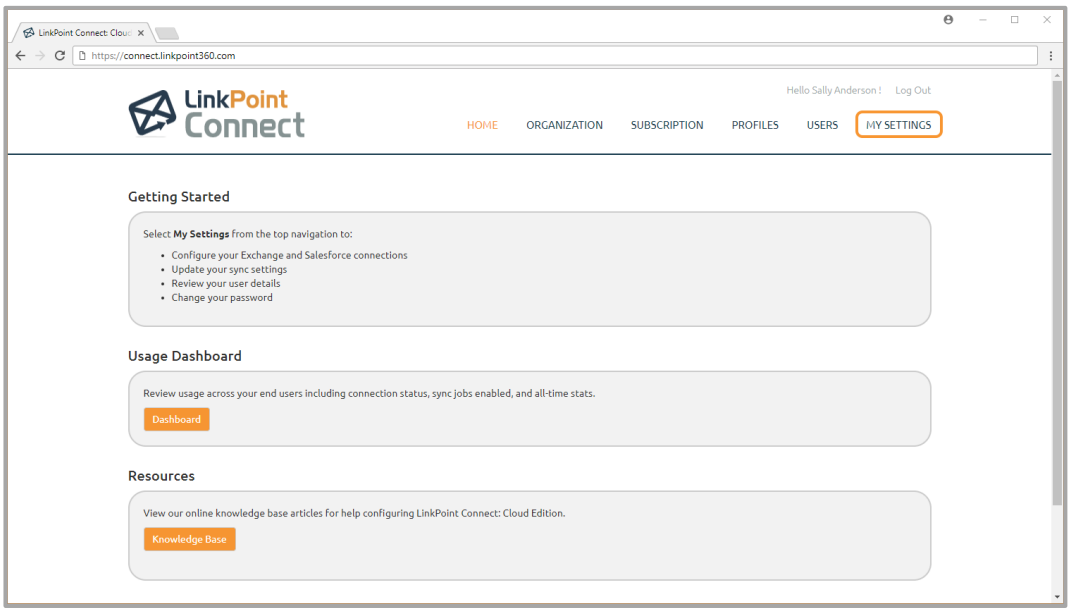
Syncing Contacts

Configuring Contact Sync Jobs

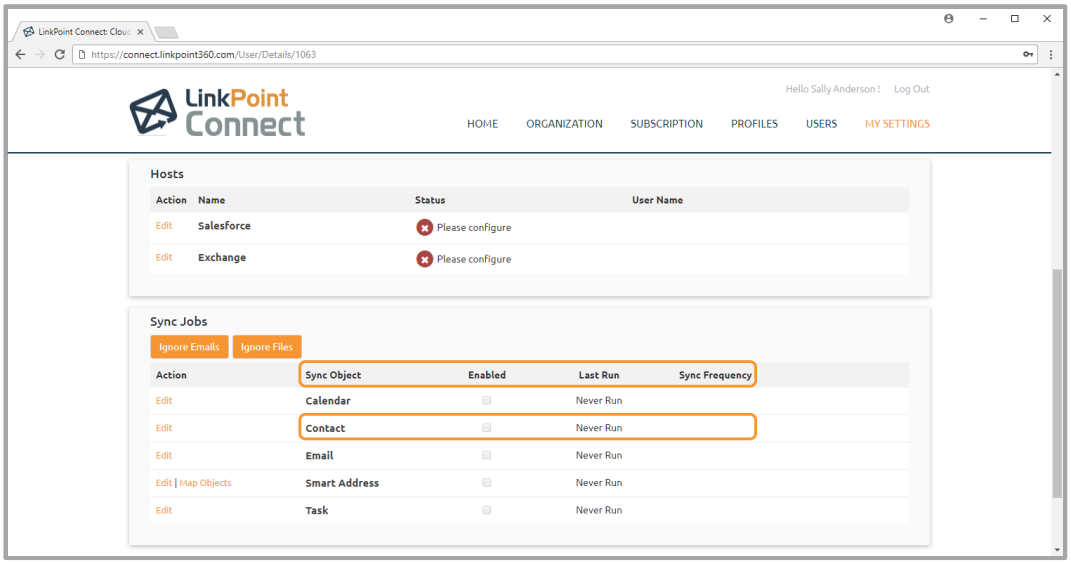
Cloud Edition includes a variety of flexible synchronization settings for managing the flow of data between Microsoft Exchange and Salesforce. Before enabling Contact Sync, it is important for users to become familiar with the available Cloud Edition sync settings. The synchronization of emails, calendars, contacts, and tasks works similarly but can be managed separately based on user preference. In this section, you will learn how to access and alter the Contact Sync settings available with Cloud Edition.

Tip: Cloud Edition Admins have the ability to set default sync settings and/or lock down these settings to prevent end user override. Your instance of Cloud Edition may not allow you to change any/all of the settings described in this section, depending on how your Admin has configured your access. Settings that are preset and locked by an Admin are visible to end users but are grayed out and cannot be edited.

1. Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.

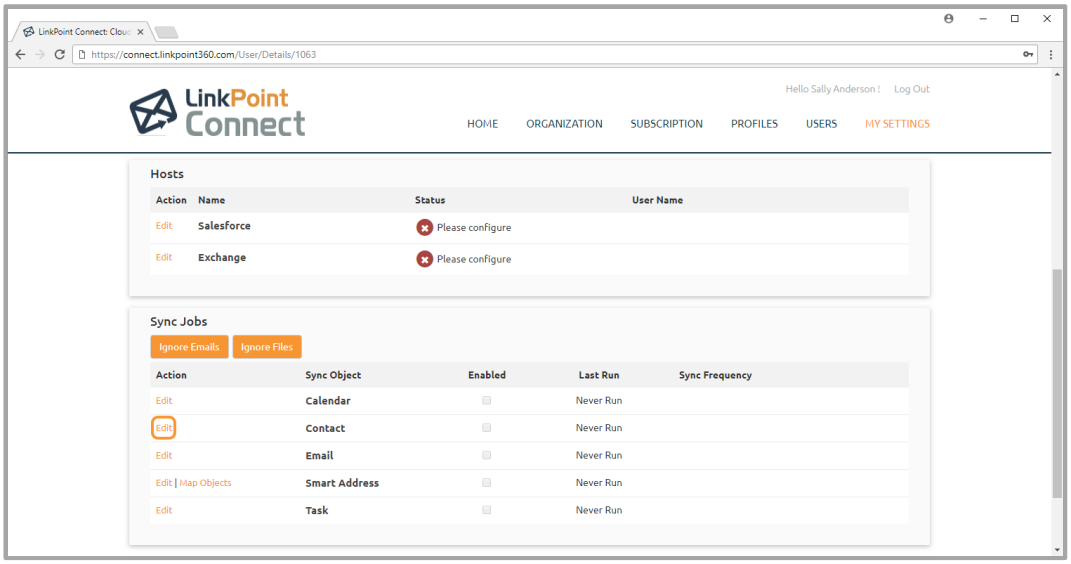


2 Locate the **Sync Jobs** section and note the information displayed for the **Contact Sync Object**. At a glance, users can see whether the Contact Sync is **Enabled**, when the sync was **Last Run**, and the configured **Sync Frequency**.



Tip: The first time you set up your Contact Sync, the **Enabled** checkbox will be deselected, the **Last Run** date and time will be listed as **Never Run**, and the **Sync Frequency** will be blank.

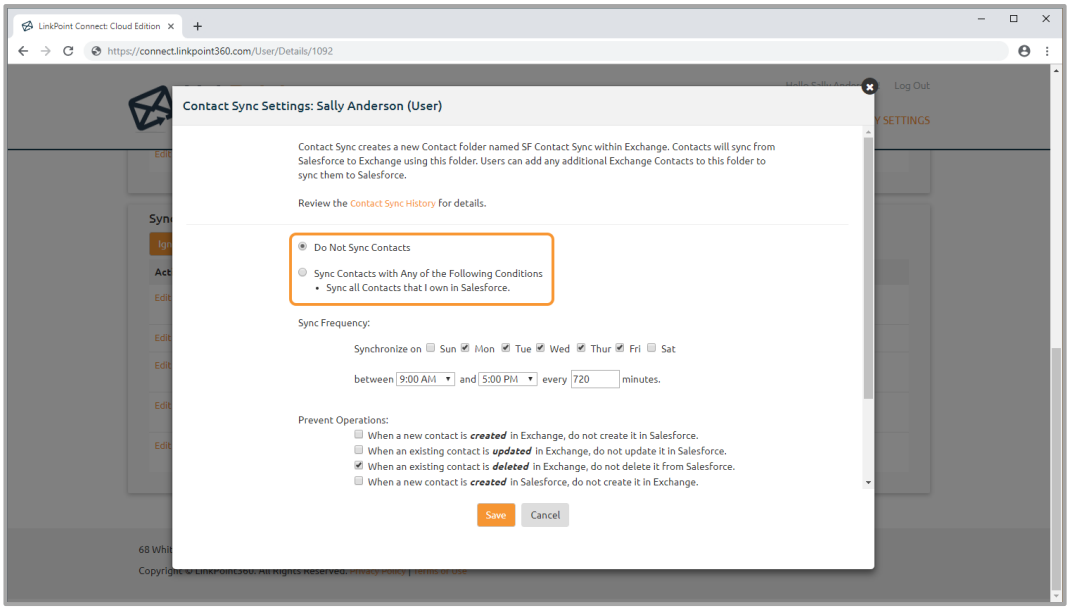
3 Select the **Edit** link for the **Contact Sync Object** to view the available sync options.



Tip: To review the sync settings without making changes, you can select **Contact** to open the Contact Sync Settings window. This will show all of the settings as read only. You can click the **Edit** button to make changes to the settings if needed.

4 Select a sync option to enable Contact Sync. Note that there are two modes to choose from based on how you would like the data to be handled.

- Do Not Sync Contacts:
  Disables Contact Sync. Contact Sync is off by default for all new accounts and new users.
- Sync Contacts with Any of the Following Conditions:
  Enables Cloud Edition to sync Contacts based on the displayed criteria. By default, all users are configured to sync the Contacts that they own within Salesforce.

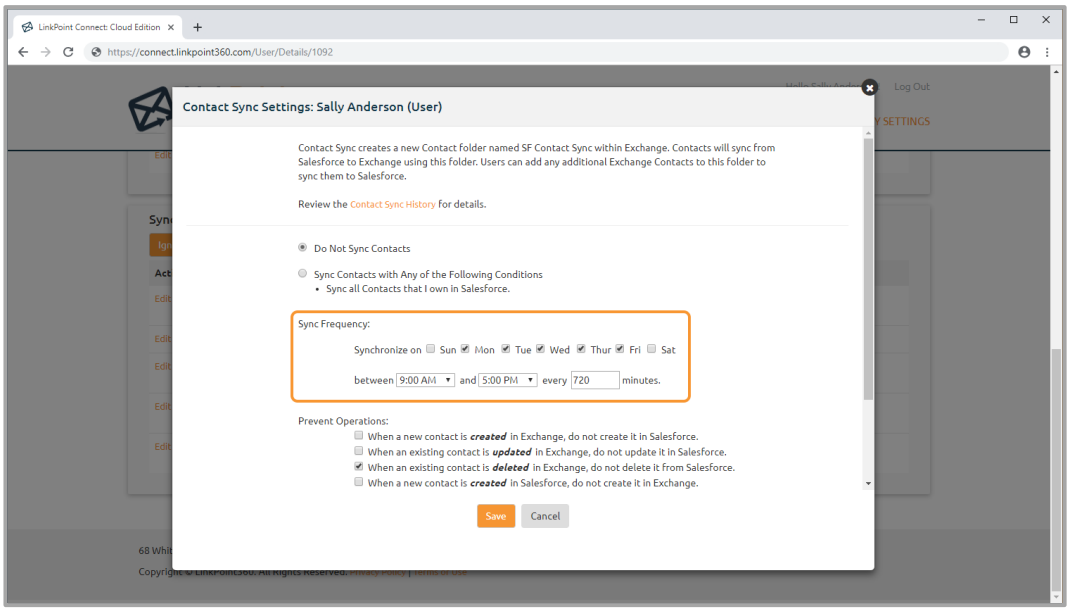


Tip: If an option other than **Do Not Sync Contacts** is already selected for you, your Admin may have preconfigured the setting. If you are not able to change the setting selection, your Admin may have locked down the setting.

Tip: Contact Sync creates a separate Contact folder called *SF Contact Sync* within Exchange the first time the sync is enabled. Contacts will sync from Salesforce to Exchange using this folder. Users can add any additional Exchange contacts to the Contact Sync folder to sync bi-directionally or to Salesforce based on user settings.

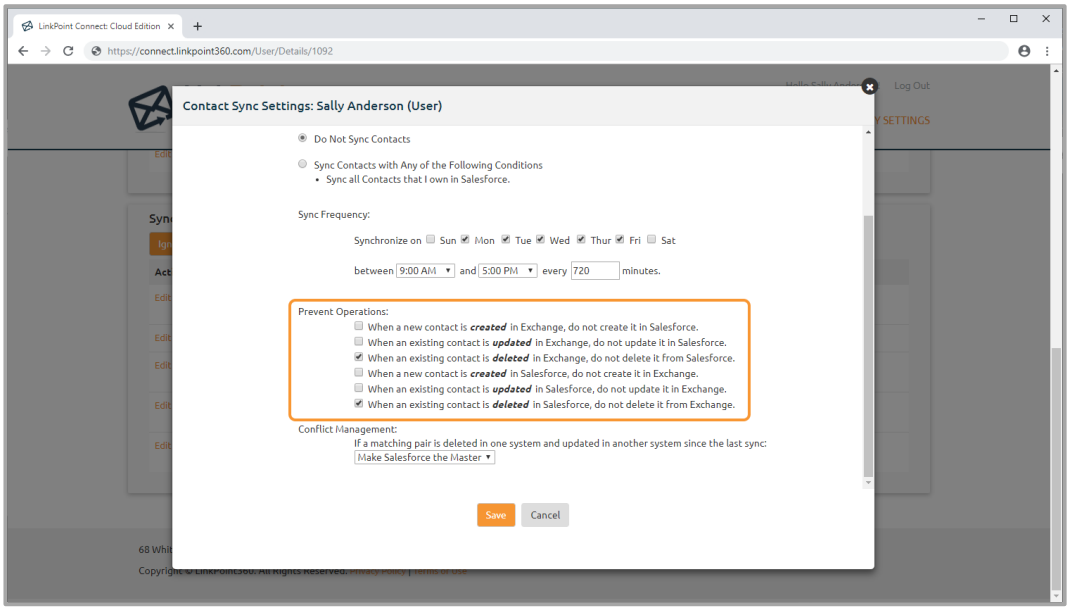
Tip: Admins can request a consultation with LinkPoint360 Professional Services to expand the sync criteria for Contacts to meet workflow requirements.

5 Enter the preferred **Sync Frequency** in the provided fields. Select the day and time range during which you want the sync to run. Note that these times will be based on the time zone you set for your user account.



Tip: The maximum sync frequency cannot exceed 30 minutes. Users cannot sync more than 30 days of past items or more than 365 days of future items.

6 Set your **Prevent Operations** preferences. Indicate whether Cloud Edition should create, update, or delete items in Salesforce or Exchange for new and existing contacts. By default, the options to prevent deletion in both Salesforce and Exchange are enabled.



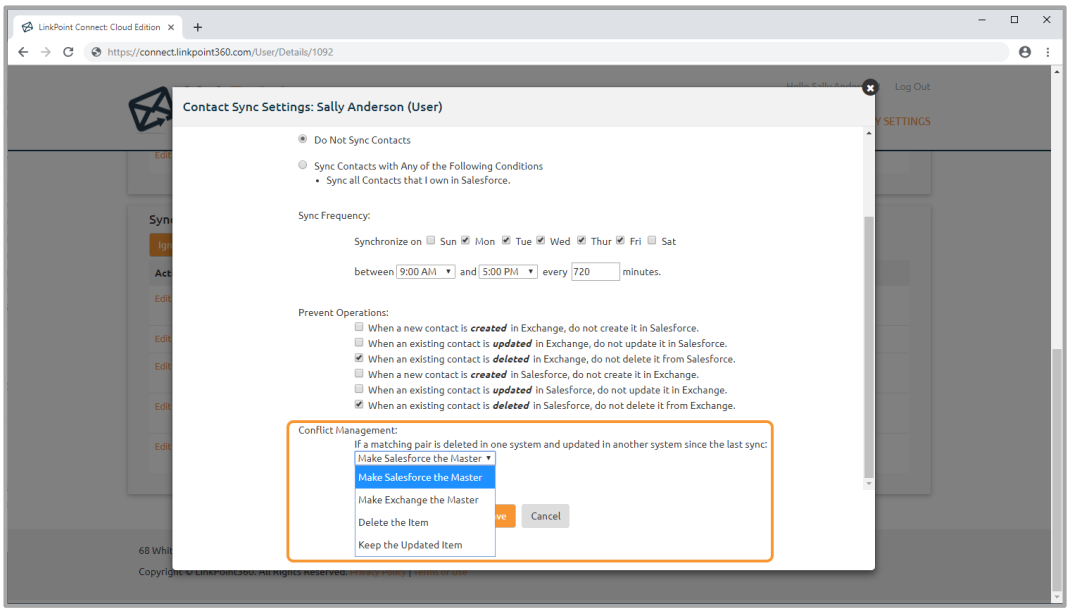
Tip: Users can prevent Cloud Edition from creating, updating, or deleting items regardless of any Salesforce settings. Users can set this individually for Salesforce and Exchange, effectively creating bidirectional or one-way sync rules. The Prevent Delete options are enabled by default to prevent new users from deleting Contacts when configuring their initial sync.

Warning: Prevent Operations settings override typical sync behavior. For example, choosing prevent a contact from being created in Salesforce and then adding a new contact to the SF Contact Sync folder in Exchange will result in the item not syncing to Salesforce.

Tip: If you enable a Prevent Operations option and run your sync, the items included in the sync attempt will be excluded moving forward.

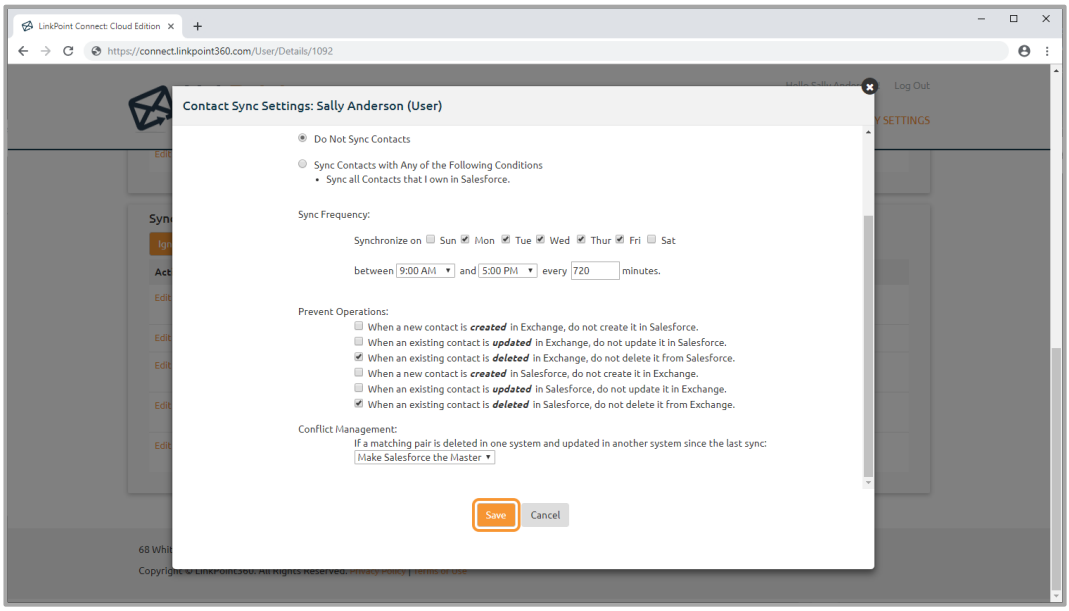
7 Set the **Conflict Management** rule for when a contact is deleted in one system but updated in another system since the last sync.

- **Make Salesforce the Master:** The action that occurred in Salesforce applies to the Exchange version of the item.
  - For example, if the item is deleted in Exchange and updated in Salesforce, the item will be updated in both systems (not deleted).
- **Make Exchange the Master:** The action that occurred in Exchange applies to the Salesforce version of the item.
  - For example, if the item is deleted in Salesforce and updated in Exchange, the item will be updated in both systems (not deleted).
- **Delete the Item:** If the item is deleted in one system, it will be deleted from the other as well.
  - For example, if the item is deleted in Exchange and updated in Salesforce, the item will be deleted in both systems (not updated).
- **Keep the Updated Item:** If the item is updated in one system, it will be updated in the other as well.
  - For example, if the item is updated in Salesforce and deleted in Exchange, the item will be updated in both systems (not deleted).

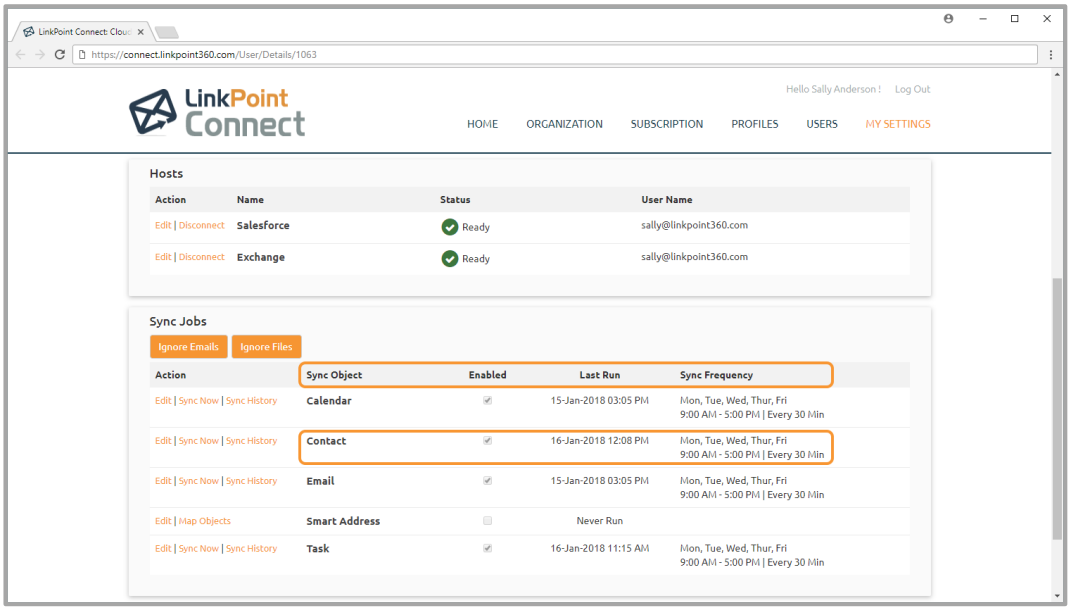


Warning: Prevent Operations settings override any selections you make for the Conflict Management rule. For example, choosing prevent a contact from being deleted in Exchange and then selecting the Conflict Management rule *Delete Wins* will result in the item not being deleted from Exchange.

8 Click the **Save** button when finished. Then close the **Contact Sync Settings** window.

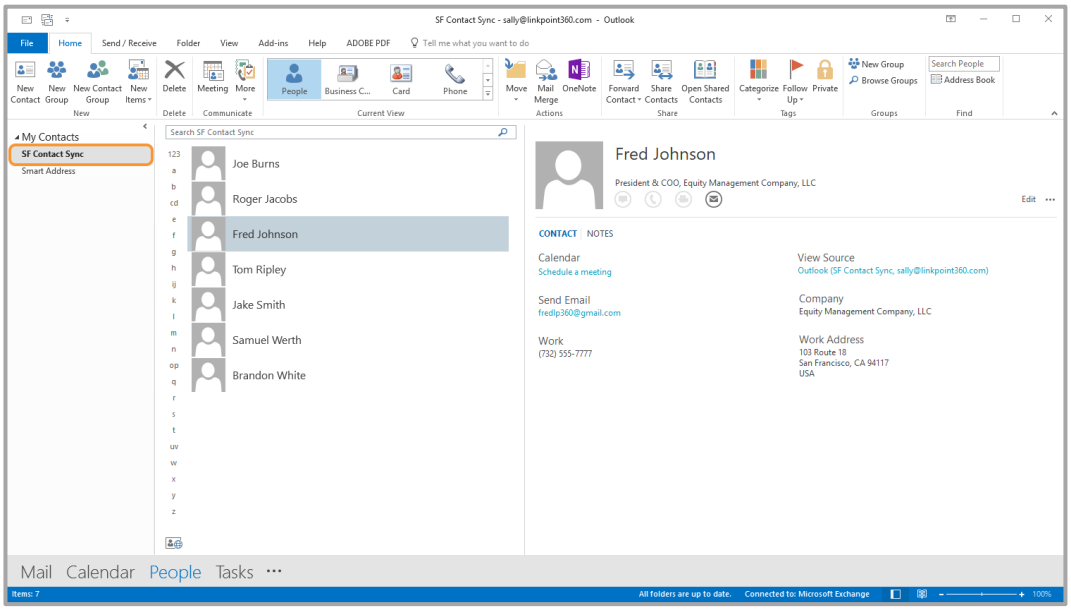


9 The Contact Sync will run immediately after it is enabled. The Sync Jobs will show the last run date and time and will reflect the Sync Frequency that was selected when editing the sync.



Tip: To run the Contact Sync again, you can click the **Sync Now** option. This will place the Sync Job in the queue for processing. This does not mean that the sync immediately runs. The process can take several minutes depending on the amount of data that meets the sync criteria. To click **Sync Now** again, refresh the page.

10 The SF Contacts folder in Exchange will populate with Salesforce Contacts based on the selected sync settings. Mobile users will find their Salesforce Contacts are added to their address book or contact lists on their devices.

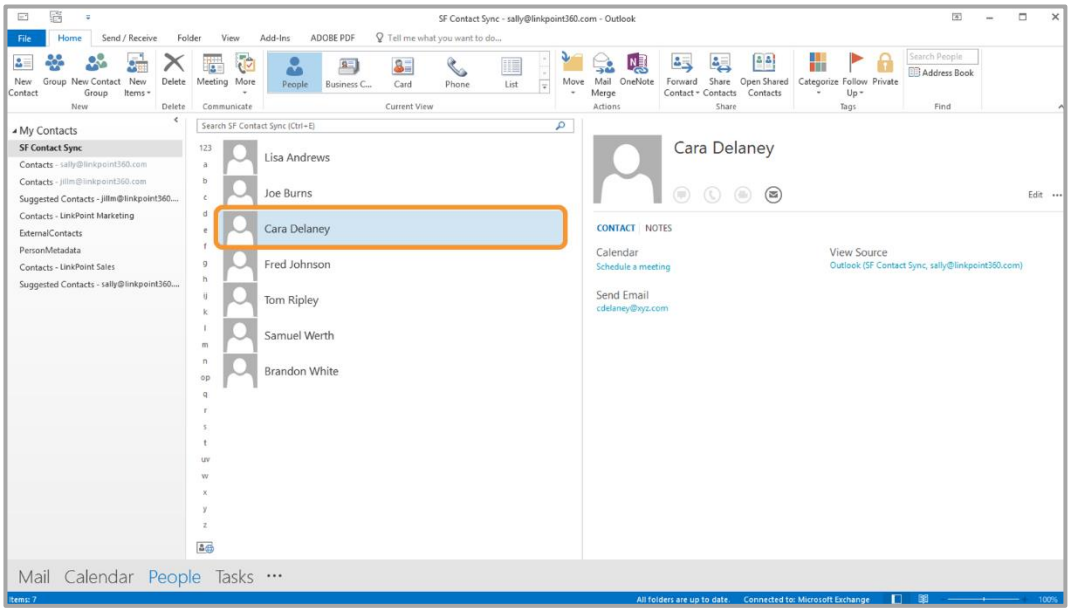


Troubleshooting Contact Sync

Cloud Edition offers users the flexibility to customize how Contact Sync moves data between Salesforce and Microsoft Exchange. When getting started, users may experience outcomes that do not match their expectations for the sync functionally. In this section, you will review some common scenarios to help with troubleshooting Contact Sync and to guide you as you configure your settings.

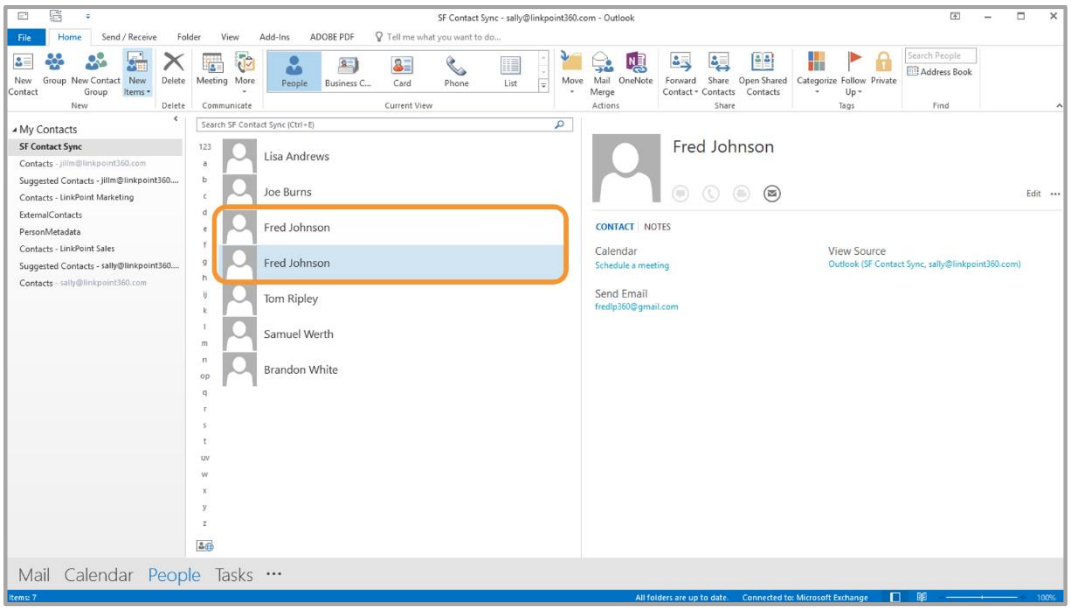
Syncing Contacts from Exchange to Salesforce

Users can copy or move existing Exchange contacts to the SF Contact Sync folder to sync the items to Salesforce. However, note that there is no way to associate a new contact from Exchange to an existing Salesforce record. As a result, the Exchange contact will sync to Salesforce but will become a Private Contact. You will need to locate it and add any necessary associations.



Avoiding Duplicate Contacts from Exchange to Salesforce

Users can copy or move existing Exchange contacts to the SF Contact Sync folder to sync the items to Salesforce. However, if you add a Contact with a specific email address (i.e. xyz@abc.com) from Exchange to the SF Contact Sync folder, and you already have a Contact that synced from Salesforce to Exchange with the same email address (i.e. xyz@abc.com), you will sync two instances of the contact to Salesforce the next time the sync runs. The one item will be the original from Salesforce and the other will become a Private Contact in Salesforce.



Reviewing Contact Sync History

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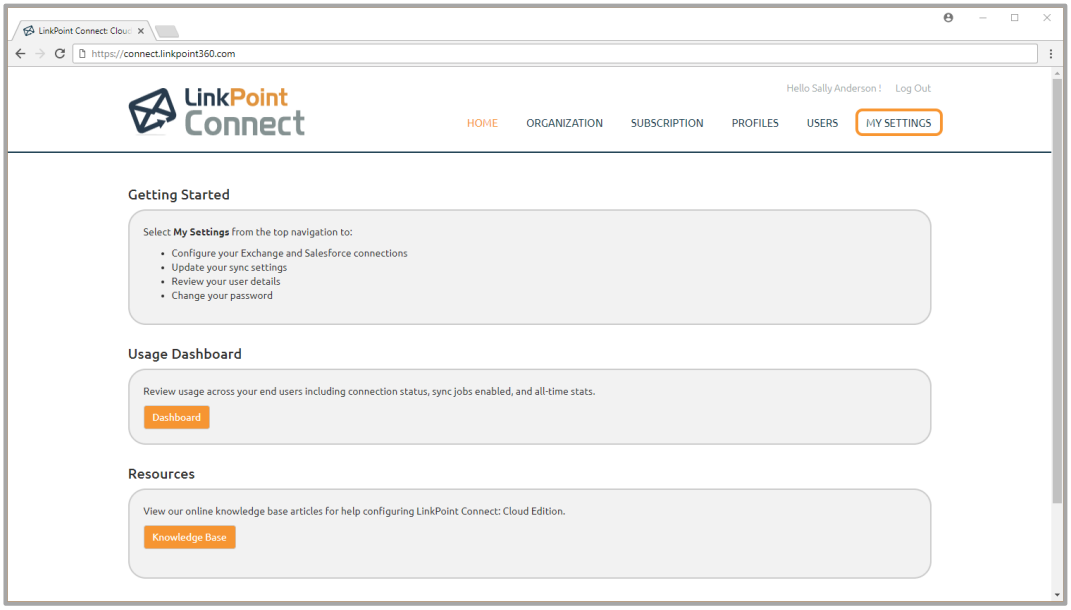
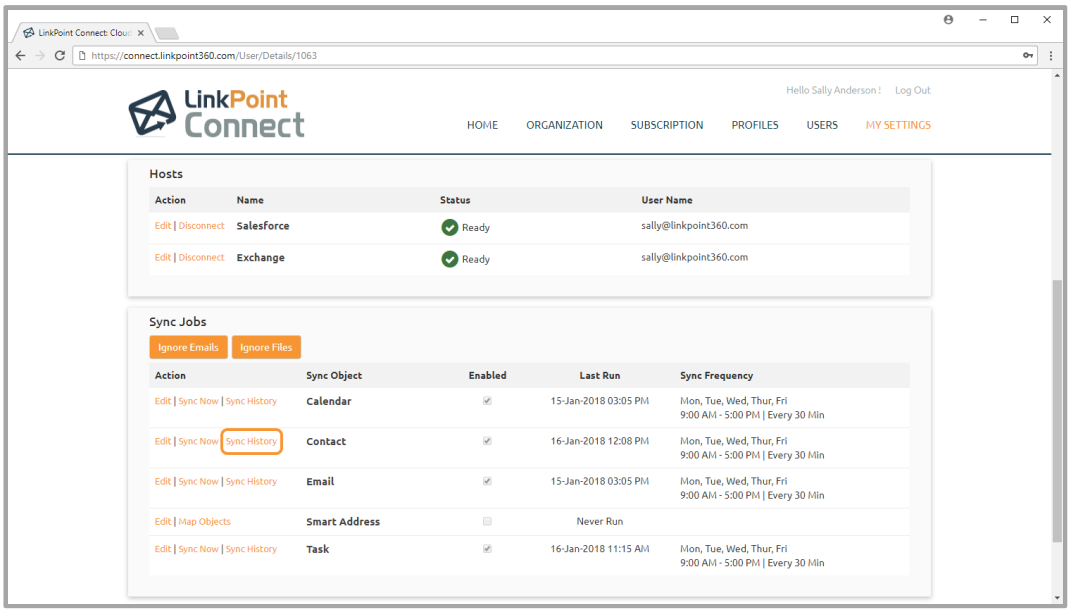
Warning: Sync History retains user data for 30 days. The Sync History will be rebuilt for users who disconnect their Exchange or Salesforce hosts and reconnect with new details. This ensures that users are viewing the history for the current configuration.

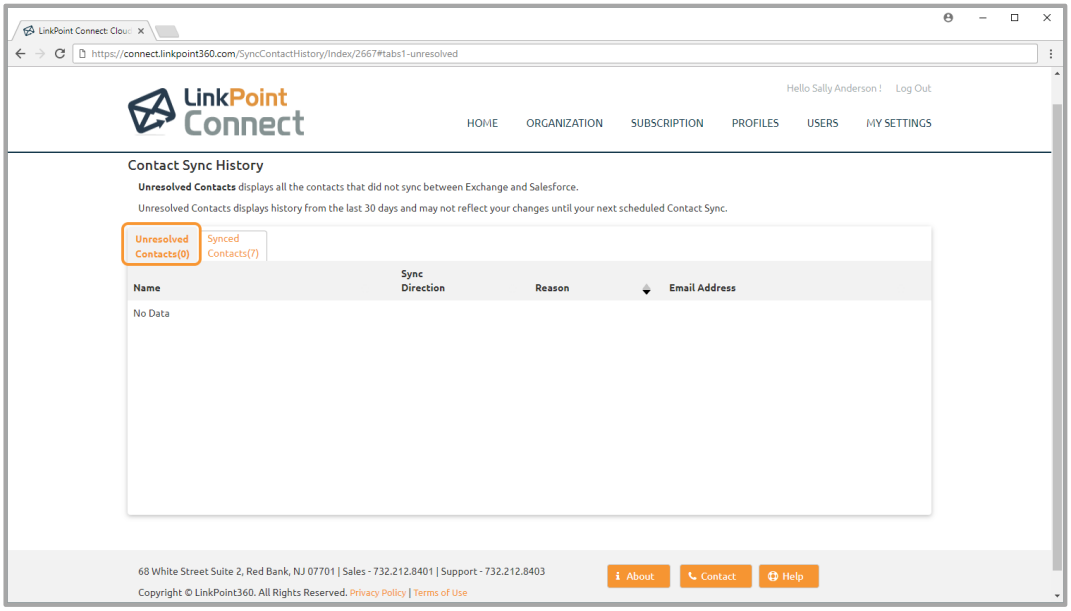
1. Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.



2 Locate the **Contact Sync Object** in the **Sync Jobs** section and select the **Sync History** link.



3 Review the **Unresolved Contacts** tab to view all of the contacts that did not sync due to system error. Each row lists a single contact and the related data.

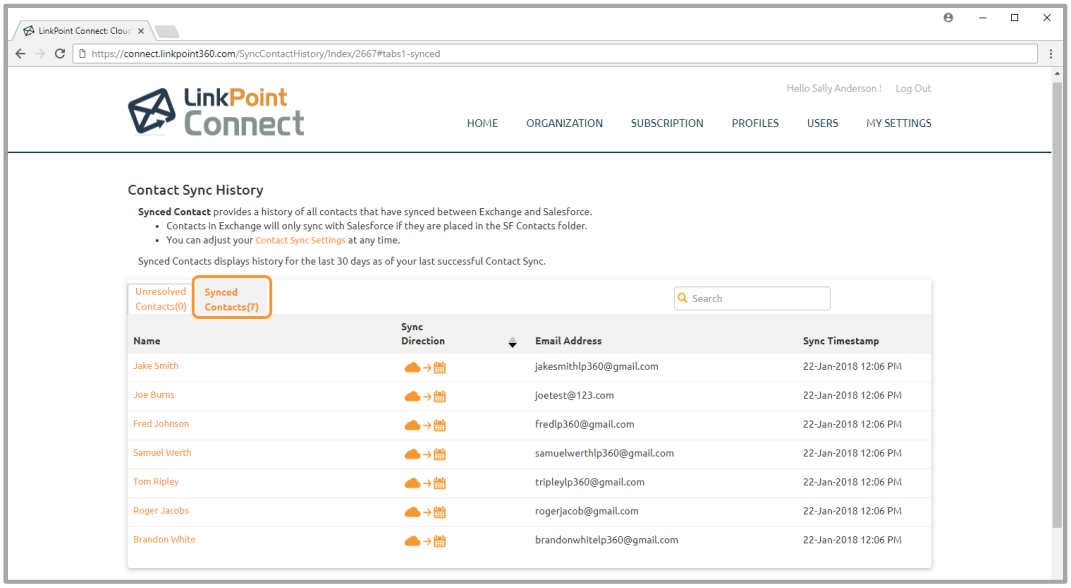


Unresolved Contacts	Definition
Name	Displays the contact's full name
Sync Direction	Indicates whether the item was created in Outlook and attempted to sync to Salesforce or created in Salesforce and attempted to sync to Outlook.
Reason	Explains why the contact did not sync.
Email Address	Displays the contact's email address.

Tip: Items remain in this list until an action resolves the sync issue (i.e. the error has been resolved) or until the item exceeds 30 days of sync attempts.

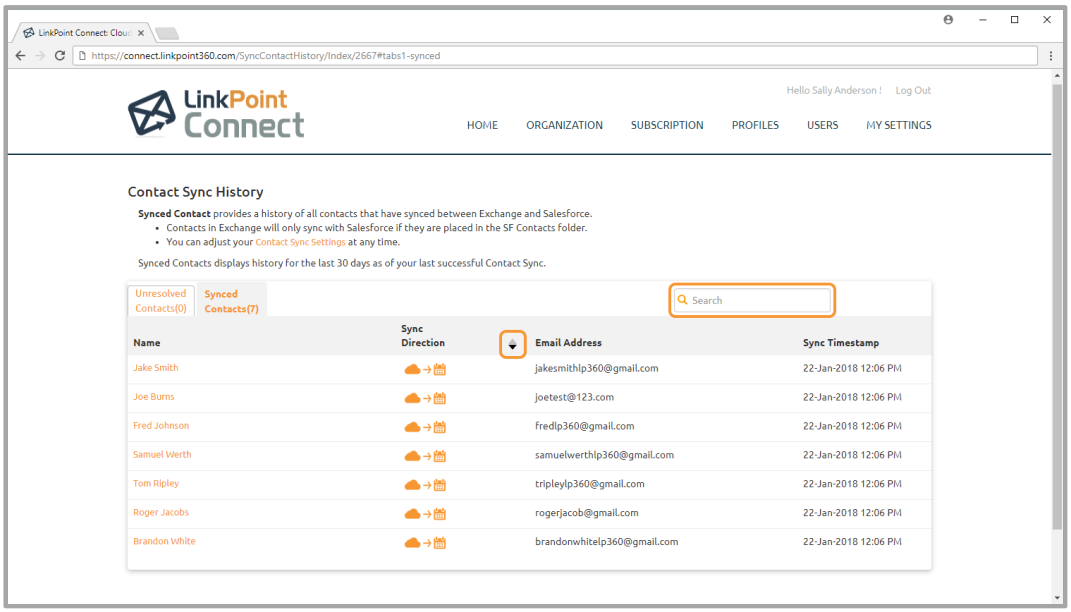
Tip: You can sort the items by clicking the column headers to view items in ascending or descending order. Search partial or full terms to filter the list and find specific items more quickly.

4 Select the **Synced Contacts** tab to view all of the contacts that synced based on the established sync settings. Each row lists a single task and the related data.



Synced Tasks	Definition
Name	Displays the contact's full name. Click to view the contact in Salesforce.
Sync Direction	Indicates whether the item was created in Outlook and attempted to sync to Salesforce or created in Salesforce and attempted to sync to Outlook.
Email Address	Displays the contact's email address.
Sync Timestamp	Shows the date and time that the item synced.

5 Sort the items by clicking the column headers to view in ascending or descending order. Search partial or full terms to filter the list and identify specific items more quickly.



Tip: Contacts that do not sync due to Prevent Operations settings will not appear in the Contact Sync History since the system completely ignores those items when created, updated, or deleted, as specified.

Syncing with Smart Address

Configuring Smart Address

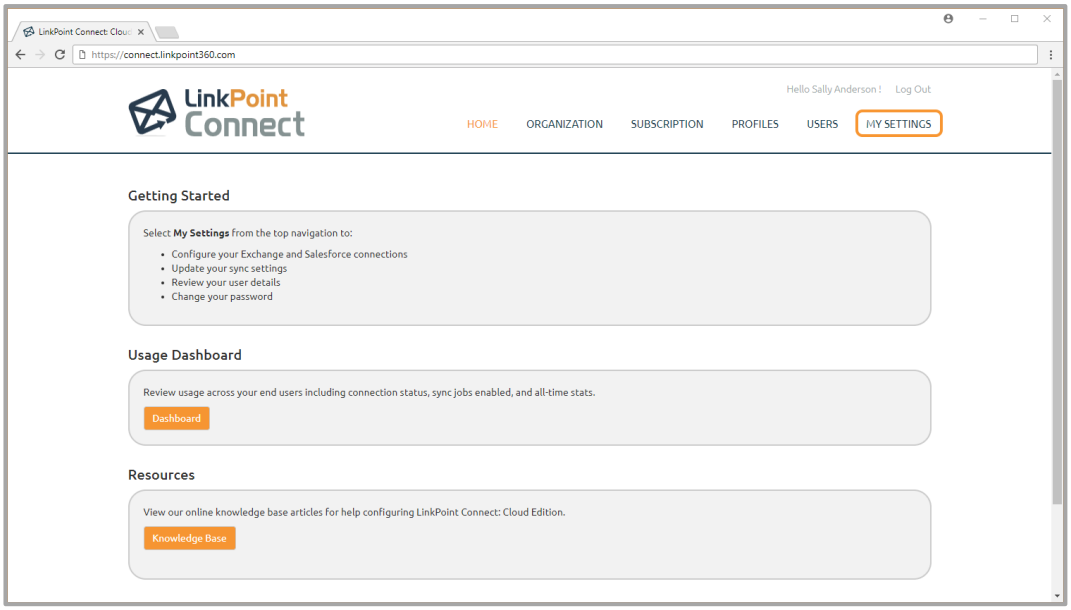
Cloud Edition's Email and Calendar Sync Jobs are designed to enable users to move data between Salesforce and Exchange and to associate these items to matching Salesforce Lead and Contact records where applicable (i.e. Salesforce "Who" records). In many instances, users also want the ability to associate emails and calendar items to additional Salesforce records such as Accounts, Opportunities, and Cases (i.e. Salesforce "What" records).

Smart Address offers users the ability to tag emails and calendar items and associate them with a Salesforce "What" record as part of the sync process. To do this, Smart Address Sync creates a separate Contact folder within Exchange and generates a unique email address for each object record that is enabled. As users send emails or create meetings, they can add Smart Addresses from their Address Book or Contacts folder wherever they have access to their Exchange account (desktop, web mail, mobile device, etc.). Cloud Edition detects Smart Addresses and uses them to relate the emails and calendar items to additional Salesforce records. In this section, you will learn how to enable Smart Address.

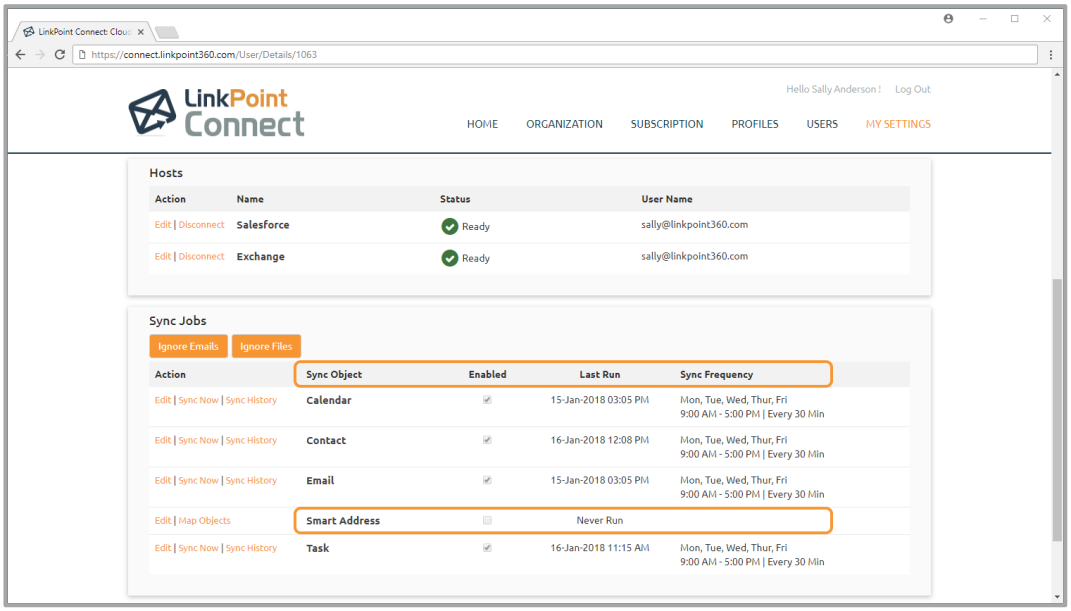
Warning: Smart Address functionality is only available when working with Email and Calendar Sync. Smart Addresses cannot be appended to Task or Contact records from Exchange to create associations in Salesforce.

Warning: Cloud Edition Admins have the ability to set default sync settings and/or lock down these settings to prevent end user override. Your instance of Cloud Edition may not allow you to change any/all of the settings described in this section, depending on how your Admin has configured your access. Settings that are preset and locked by an Admin are visible to end users but are grayed out and cannot be edited.

1. Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.

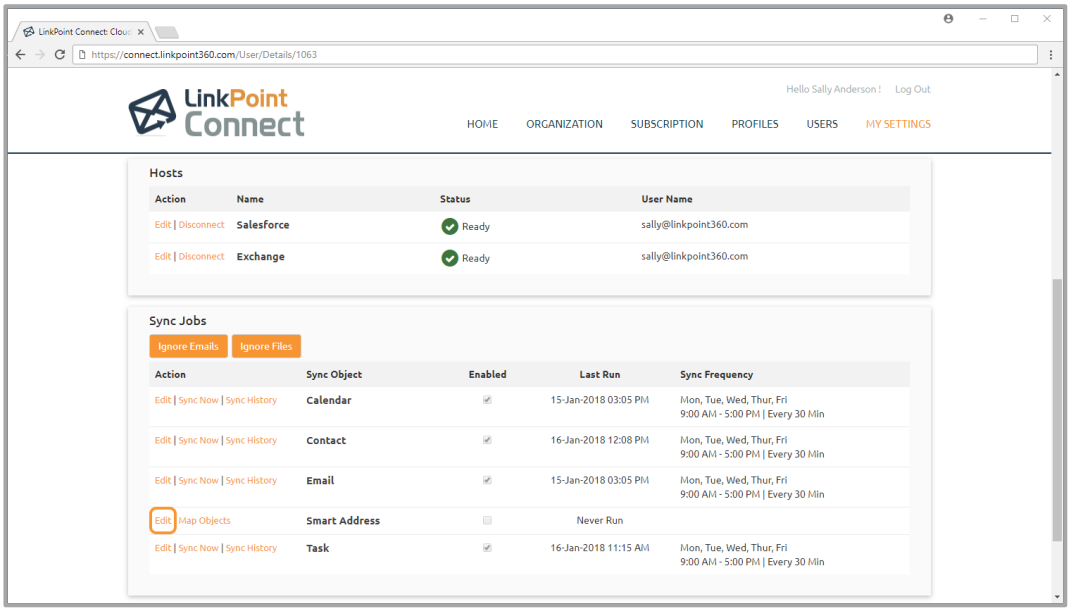


2 Locate the **Sync Jobs** section and note the information displayed for the **Smart Address Sync Object**. At a glance, users can see whether the Smart Address Sync is **Enabled**, when the sync was **Last Run**, and the configured **Sync Frequency**.



Tip: The first time you set up your Smart Address Sync, the **Enabled** checkbox will be deselected, the **Last Run** date and time will be listed as **Never Run**, and the **Sync Frequency** will be blank.

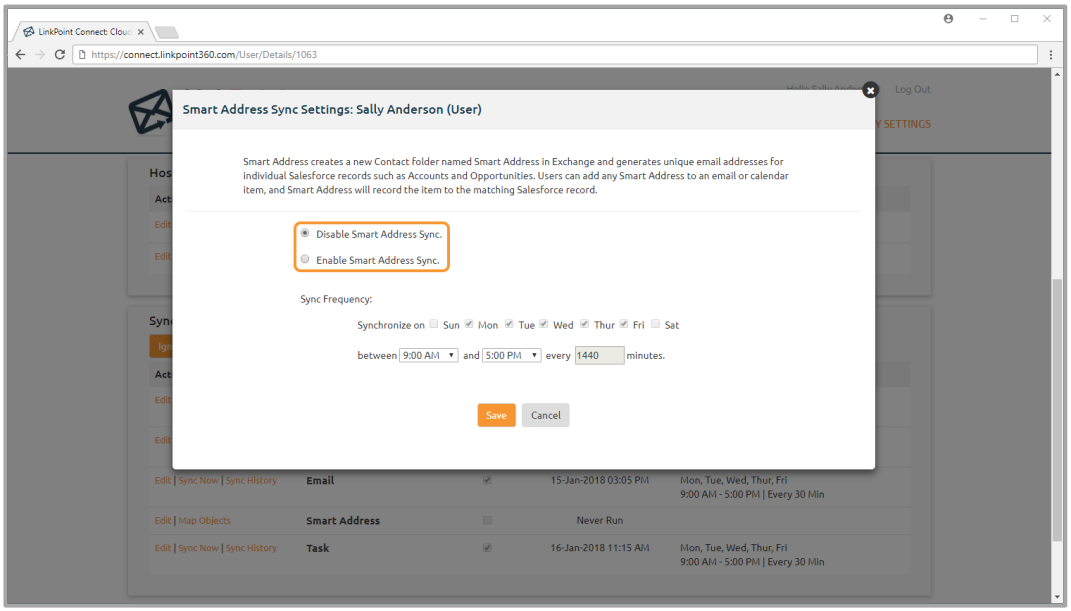
3 Select the **Edit** link for the **Smart Address Sync Object** to view the available sync options.



Tip: To review the sync settings without making changes, you can select **Smart Address** to open the Smart Address Sync Settings window. This will show all of the settings as read only. You can click the **Edit** button to make changes to the settings if needed.

4 Select a sync option to enable Smart Address Sync.

- **Disable Smart Address Sync:**
  Disables Smart Address. Smart Address is off by default for all new accounts and new users.
- **Enable Smart Address Sync:**
  Enables Cloud Edition to create a separate Contact folder within Exchange and generate default Smart Addresses.



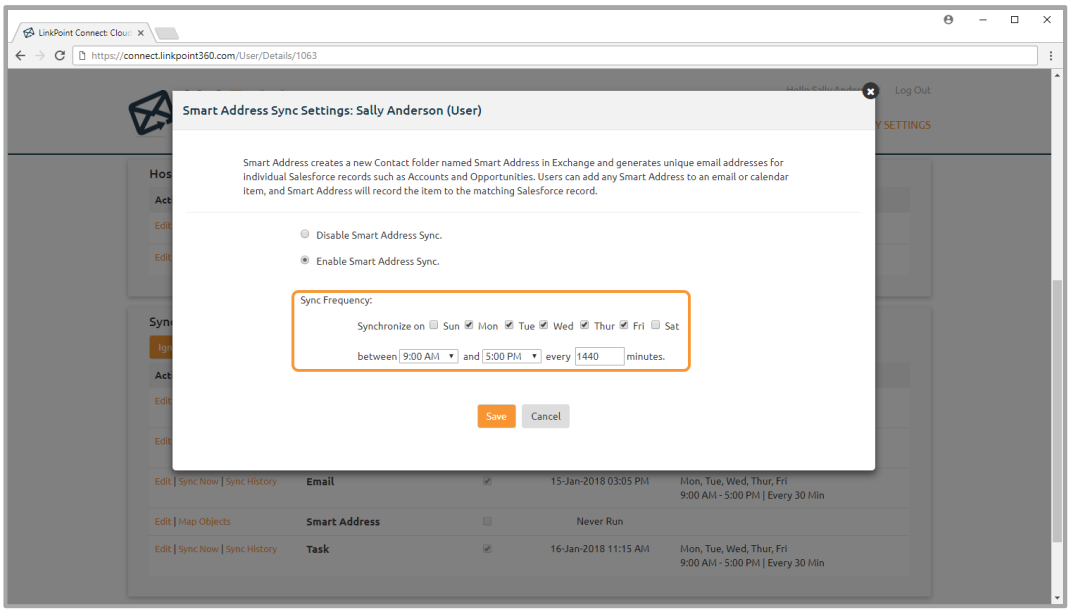
Tip: If an option other than **Disable Smart Address Sync** is already selected for you, your Admin may have preconfigured the setting. If you are not able to change the setting selection, your Admin may have locked down the setting.

Tip: Smart Addresses are created on a per object basis for all records a user owns in Salesforce. (i.e. a user will have a Smart Address for every Account they own). Smart Addresses are also created for all records that appear on the user's Most Recently Viewed list in Salesforce for the object, regardless of whether they own the account (i.e. a user viewed a colleague's Opportunity but does not own it). LinkPoint360 Professional Services can add filtering to exclude Smart Addresses based on certain criteria, such as excluding items that have a Status of Closed. Contact your Account Executive with any questions regarding Cloud Edition customization.

Tip: Smart Addresses are generated by default for the Account and Opportunity objects in Salesforce. The number of Smart Addresses generated for an end user are set to a maximum count of 3,000 per record type. In the event that the maximum number would be exceeded, priority to create Smart Addresses is given to items included in the Salesforce Recently Viewed table. The remainder are populated based on the records owned by the user, sorted by Last Viewed Date and Created Date, to give priority to more recent items.

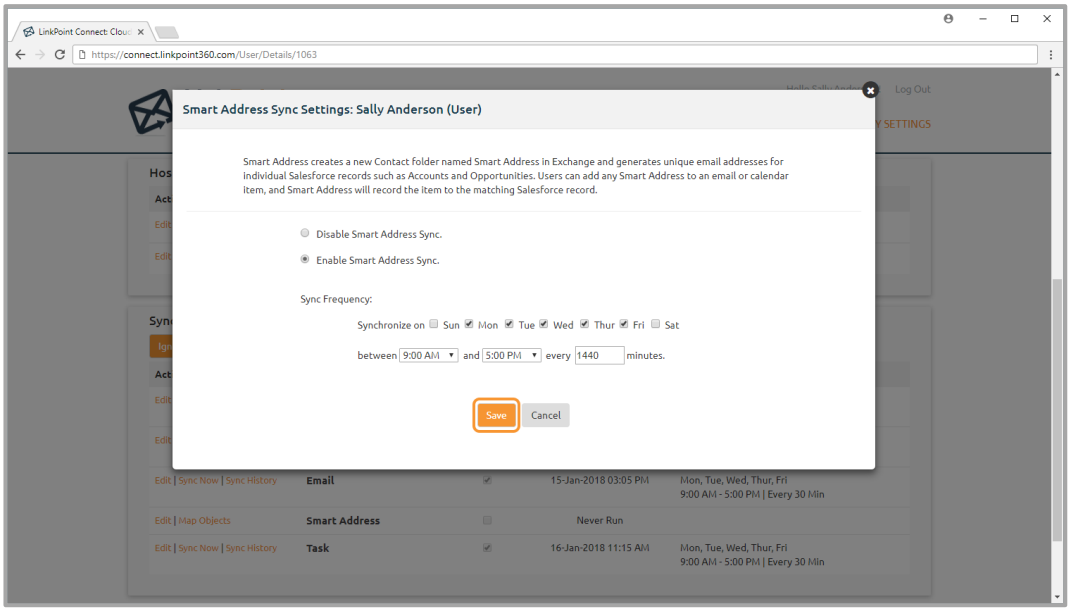
Additional Resources: Learn more about including Salesforce objects as Smart Addresses in the **Mapping New Smart Address Objects** section of this User Guide.

5 Enter the preferred **Sync Frequency** in the provided fields. Select the day and time range during which you want the sync to run. Note that these times will be based on the time zone you set for your user account.

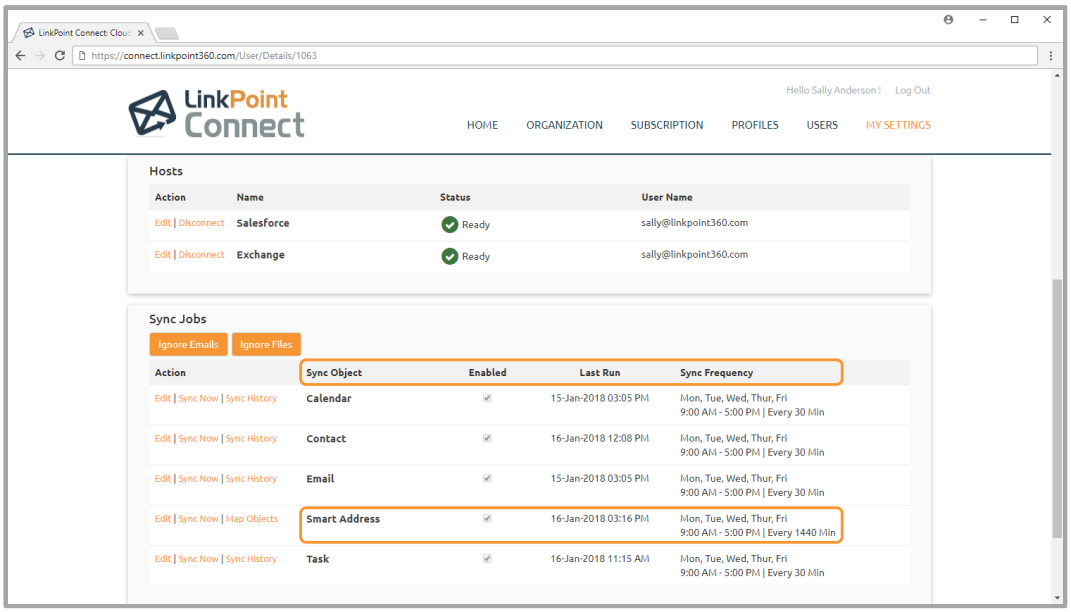


Tip: The maximum sync frequency cannot exceed 30 minutes. The default sync frequency of 1440 minutes schedules the sync to run once per day.

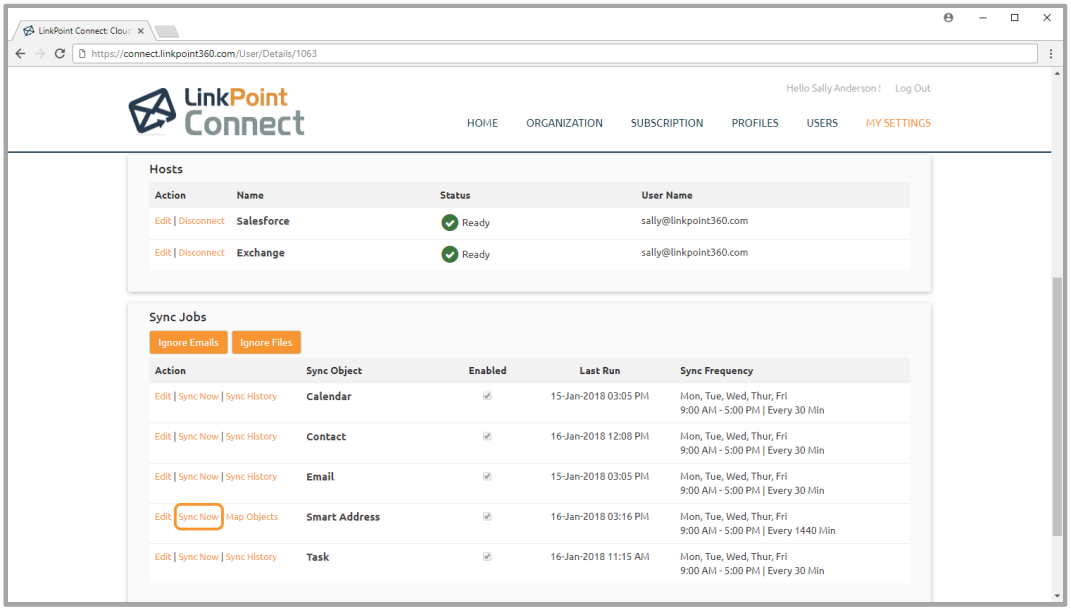
6 Click the **Save** button when finished. Then close the **Smart Address Sync Settings** window.



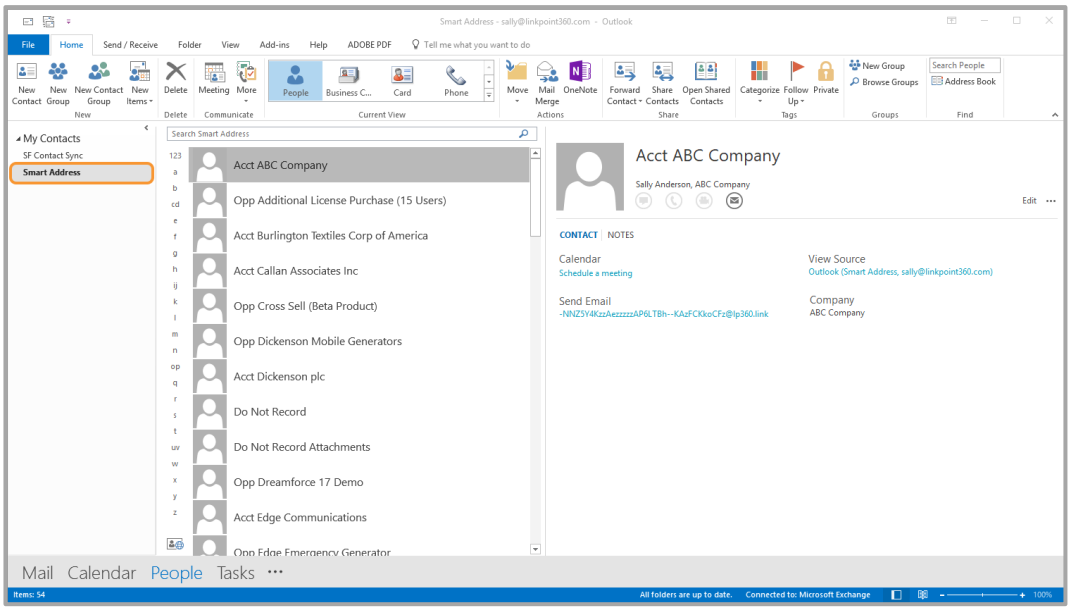
7 The Smart Address Sync will run immediately after it is enabled. The Sync Jobs will show the last run date and time and will reflect the Sync Frequency that was selected when editing the sync.



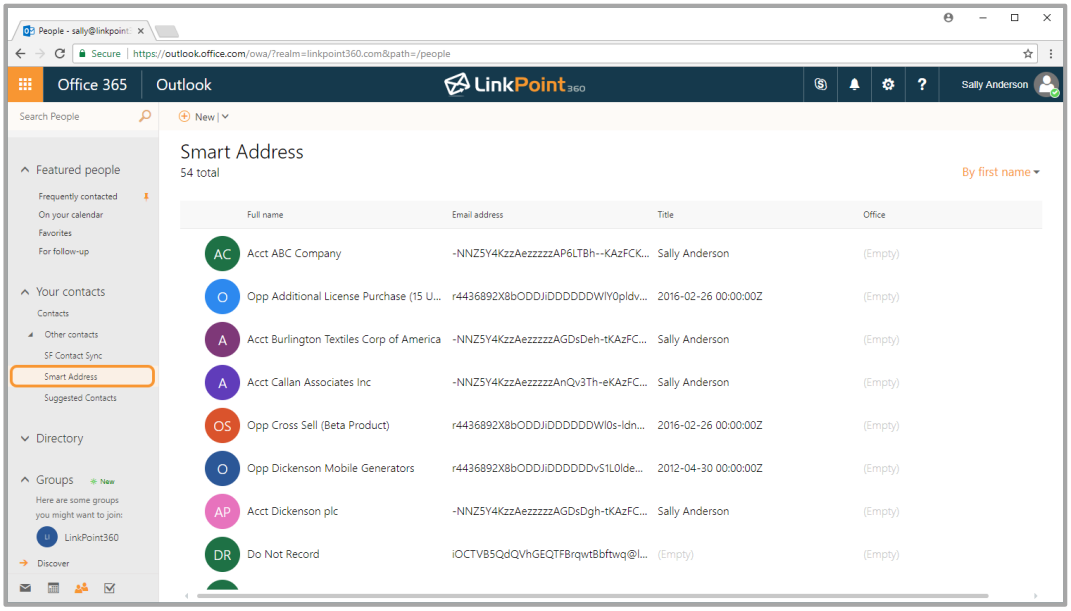
Tip: To run the Smart Address again, you can click the **Sync Now** option. This will place the Sync Job in the queue for processing. This does not mean that the sync immediately runs. The process can take several minutes depending on the amount of data that meets the sync criteria. To click **Sync Now** again, refresh the page.



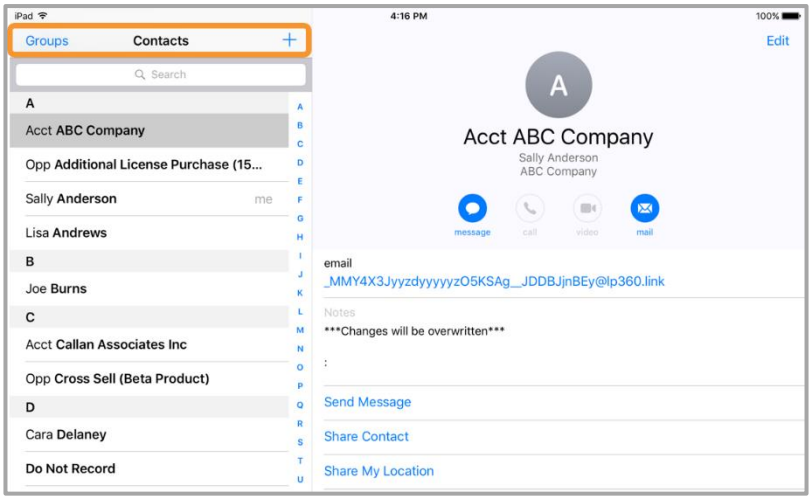
8 Navigate to the Contacts or People view within Microsoft Outlook and locate the **Smart Address** folder to view the list of Smart Addresses.



Tip: Webmail and OWA users navigate to where they access contact folders.



Mobile users can launch their preferred email application and tap to view their Contacts.



Tip: There are several ways to distinguish the Smart Addresses from one another. Items generated based on a Salesforce object will begin with the same abbreviation (i.e. "Opp" for Opportunity; "Acct" for Account).

Warning: Cloud Edition users who have enabled Contact Sync will see two folders with similar names. For Smart Address, be sure you are using the *Smart Address* folder. The *SF Contact Sync* folder is used for syncing Exchange Contacts to Salesforce. The two should not be combined.

9 Note that there are four standard Smart Tags not related to specific Salesforce records. These can be added to any email or calendar item to help designate or opt out the item from syncing.

Smart Tag	Definition
Smart Record	Marks the email or calendar item for sync consideration in keeping with the user's predefined sync criteria.
Do Not Record	Prevents the email or calendar item from recording to Salesforce, even if the item would typically sync based on predefined sync criteria.
Record Attachments	Marks the attachments on an email for sync consideration. If the email meets the sync criteria, all attachments on the email are recorded to Salesforce.
Do Not Record Attachments	Prevents the attachments on an email from recording to Salesforce, even if the user has the Automatically Record All Attachments option enabled in the Email Sync configuration.

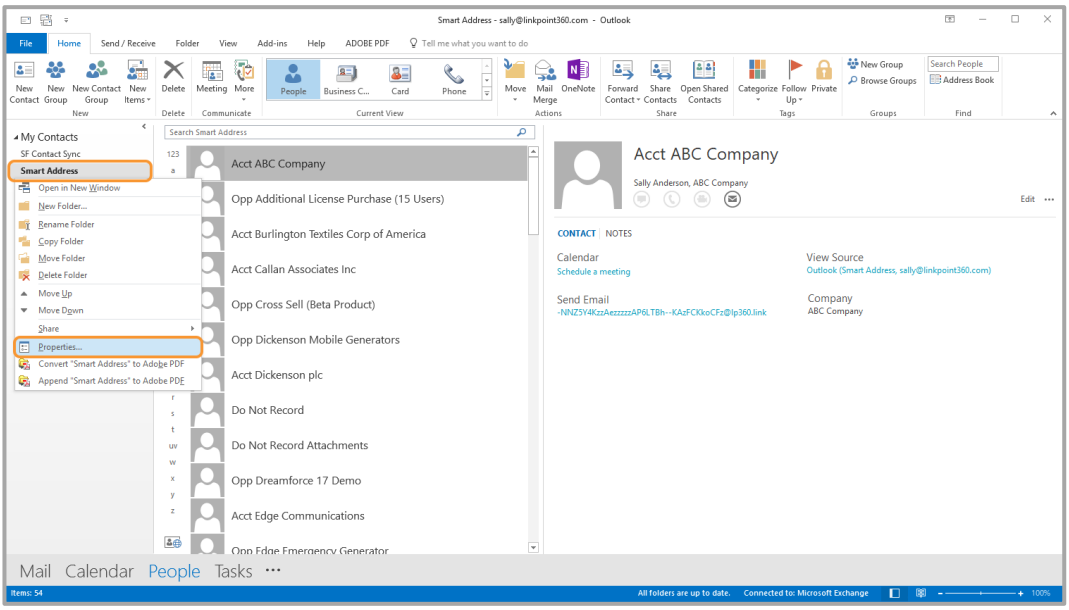
Tip: Note that all Email Sync modes and the Calendar Sync mode *Attempt to Sync Calendar Items Only Where Matching Salesforce Records Are Found* require a matching Salesforce record to sync. Adding the Smart Record tag will not force an email or calendar item to sync to Salesforce if there are no matching Salesforce records.

Warning: The ability to sync attachments applies to Email Sync only. This feature is currently not available for Calendar or Task Sync. The Record Attachments and Do Not Record Attachments Smart Tags only work with Email Sync.

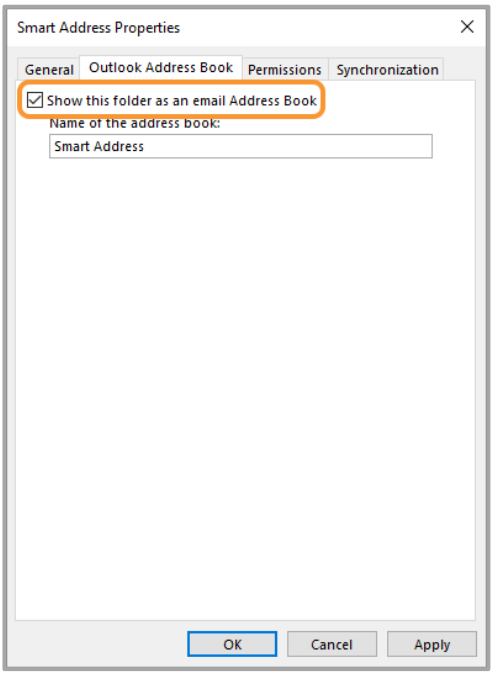
Additional Resources: Learn more about working with attachments in the **Syncing Email Attachments** section of this User Guide.

Warning: Outlook users will need to add the Smart Address folder to the list of folders available within their Global Address Book. Mobile device users can disregard these instructions.

1. Right click the **Smart Address** folder and select **Properties**.



2. Select the **Outlook Address Book** tab and check the box for **Show this folder as an e-mail Address Book**. Then, click **Apply** and **OK** to exit. This will allow you to access Smart Addresses when sending an email or calendar invite.



Tip: If you disable Smart Address, you will be asked if you want to remove the Smart Addresses from Exchange. Selecting **Delete All** will remove them from Exchange but will not impact any Salesforce records. If you enable Smart Address once again, Cloud Edition will rebuild the Smart Addresses using the same Smart Address folder in Exchange.

Warning: If you disconnect from an Exchange or Salesforce Host and reconnect to either host using a different account, the Smart Address folder will be rebuilt during the next sync. This ensures users are working with the most accurate references to Salesforce records.

Tagging Emails and Calendar Items with Smart Address

Cloud Edition's Email and Calendar Sync Jobs are designed to enable users to move data between Salesforce and Exchange and to associate these items to matching Salesforce Lead and Contact records where applicable (i.e. Salesforce "Who" records). In many instances, users also want the ability to associate emails and calendar items to additional Salesforce records such as Accounts, Opportunities, and Cases (i.e. Salesforce "What" records).

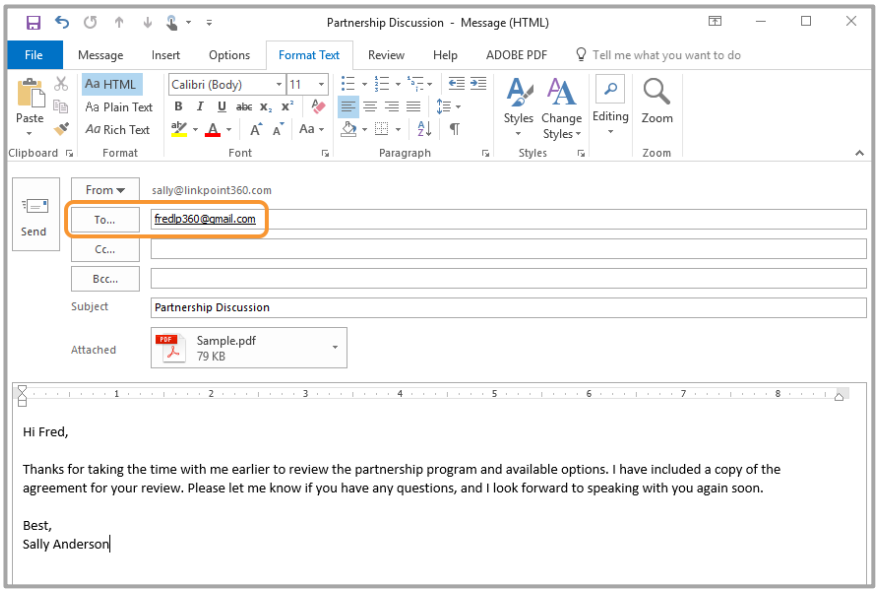
Smart Address offers users the ability to tag emails and calendar items and associate them with a Salesforce "What" record as part of the sync process. To do this, Smart Address Sync creates a separate Contact folder within Exchange and generates a unique email address for each object record that is enabled. As users send emails or create meetings, they can add Smart Addresses from their Address Book or Contacts folder wherever they have access to their Exchange account (desktop, web mail, mobile device, etc.). Cloud Edition detects Smart Addresses and uses them to relate the emails and calendar items to additional Salesforce records. Smart Tags can also be used to record attachments or to prevent attachments from recording to Salesforce. In this section, you will learn how to use Smart Address to tag emails and calendar items and associate them with Salesforce "What" records.

Warning: Smart Address functionality is only available when working with Email and Calendar Sync. Smart Addresses cannot be appended to Task or Contact records from Exchange to create associations in Salesforce. The ability to use Smart Tags to sync attachments applies to Email Sync only. This feature is currently not available for Calendar Sync.

Warning: Cloud Edition Admins have the ability to set default sync settings and/or lock down these settings to prevent end user override. Your instance of Cloud Edition may not allow you to change any/all of the settings described in this section, depending on how your Admin has configured your access. Settings that are preset and locked by an Admin are visible to end users but are grayed out and cannot be edited.

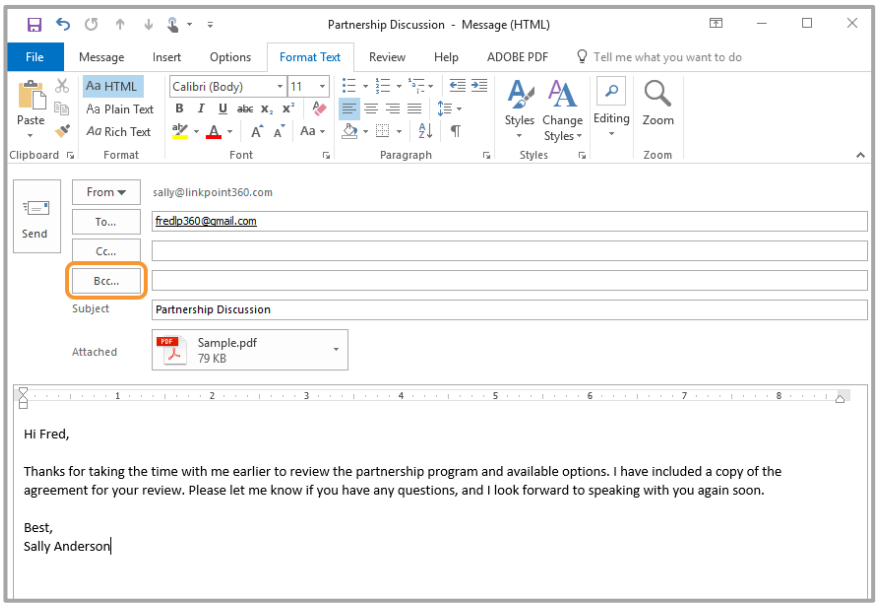
Example: In this example, we will demonstrate how to tag emails and calendar items with Smart Addresses in Microsoft Outlook on the PC Desktop. Web and mobile users can also include Smart Address on emails and calendar items but will access their Contacts differently, depending on the application (i.e. web mail, iPhone Mail, Android Mail, or third-party applications).

1 Compose an email or meeting invite and address the recipients as needed.



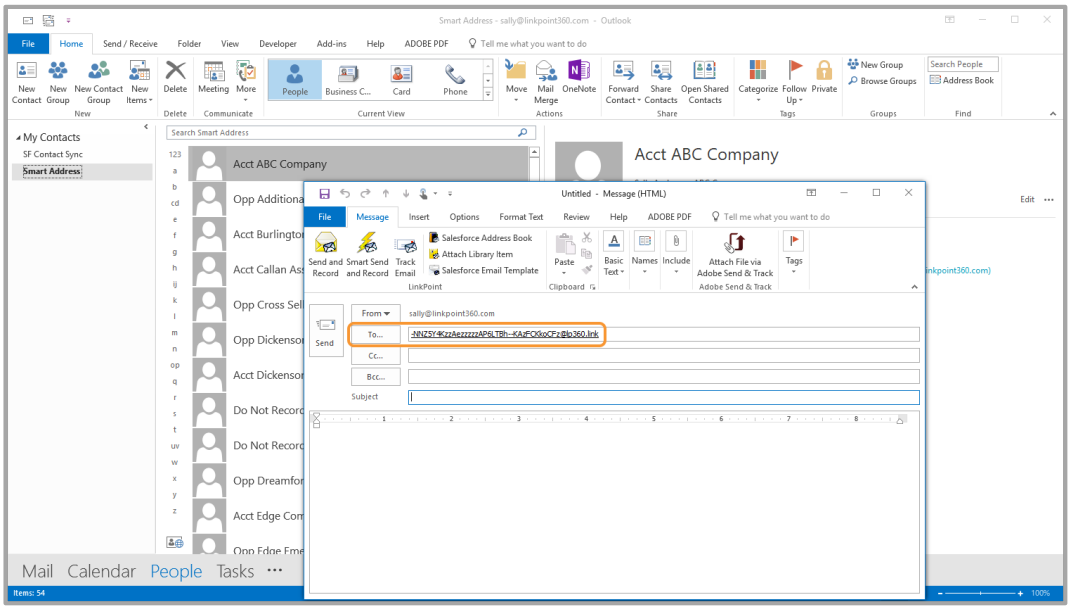
Tip: Cloud Edition will sync Appointments (calendar items with no invitees) based on your established sync settings. However, a Smart Address cannot be applied to an Appointment in Exchange since there is no To, Cc, or Bcc field where the Smart Address can be added. One work around is to create a Meeting with the Smart Address as the only invitee.

2 Click the **Bcc** button on an email or the **To** button on a meeting invite.



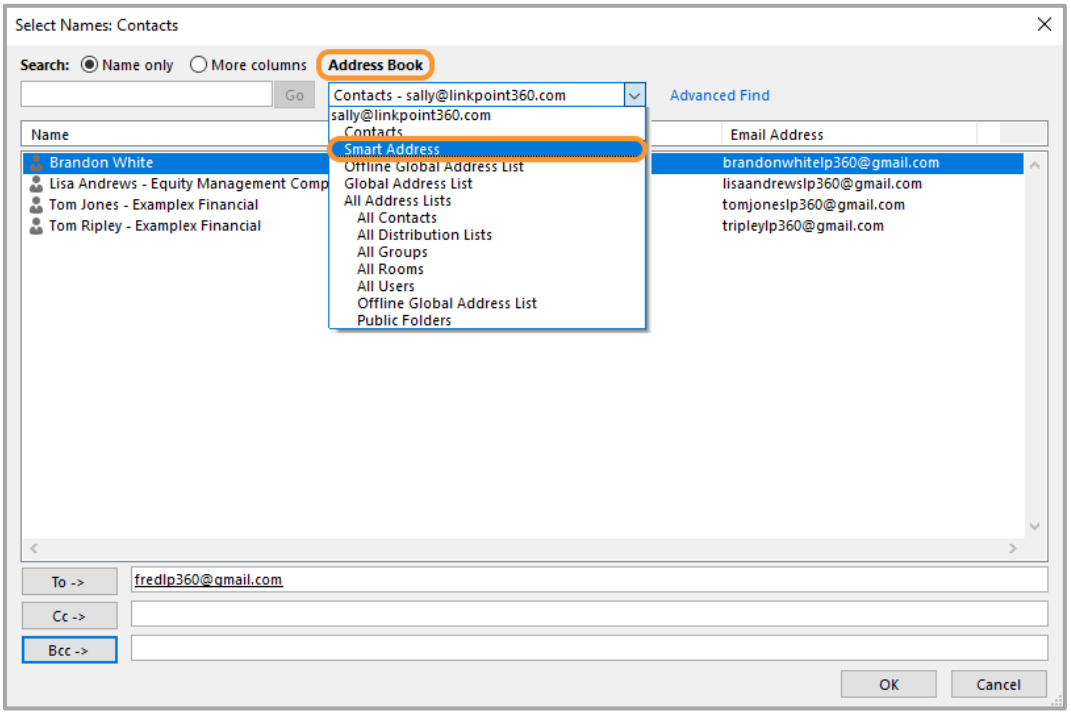
Tip: You can add a Smart Address to any recipient field (To, Cc, Bcc for email; Required, Optional for meetings). However, using the Bcc field is recommended so that other recipients of the email do not see the Smart Address listed.

Tip: You can access the Smart Addresses directly from the Contacts or People section in Outlook. However, adding these contacts to an email or calendar item directly from the Contacts or People lists will display the Smart Address in its entirety rather than with its display name. While this will not affect functionality, the data will appear longer to end users as well as in the Cloud Edition Sync History.

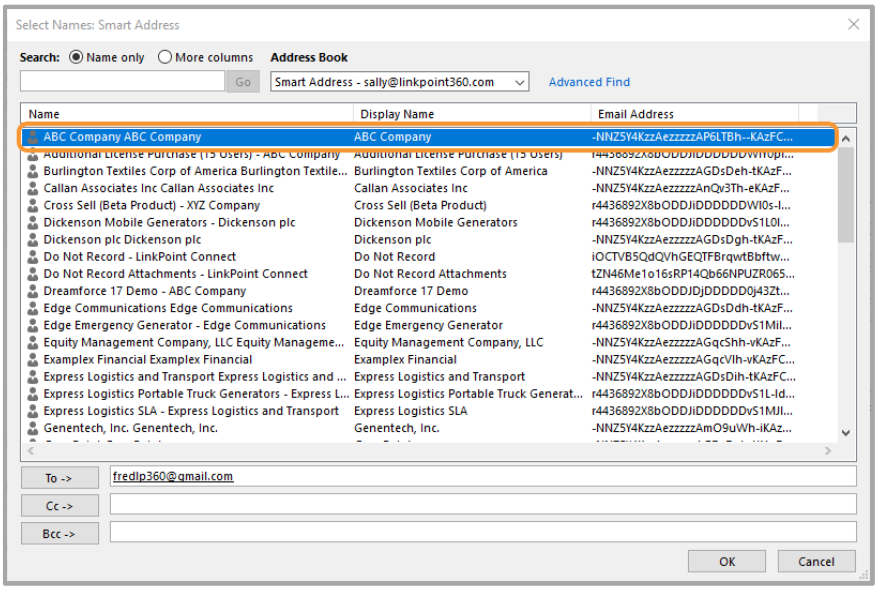


Additional Resources: Learn more about Sync History in the **Reviewing Calendar Sync History** and the **Reviewing Email Sync History** sections of this User Guide.

3 Click the **Address Book** drop-down list and select **Smart Address**.



4 Review the list of available Smart Addresses, and select the Smart Address to add to the email or calendar item.

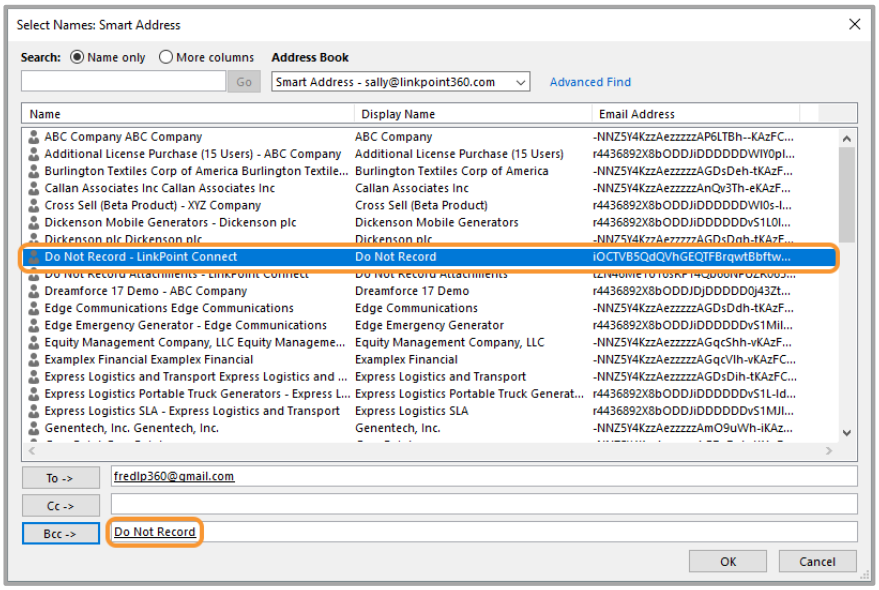


Warning: Be sure to include only one Smart Address per email or calendar item. Do not add multiple Smart Addresses at once. Salesforce limits syncing items to a single "What" record at a time. An email or calendar item with multiple Smart Addresses included will only sync to a single Salesforce Record. In these instances, Cloud Edition will sync the item to the first Smart Address listed.

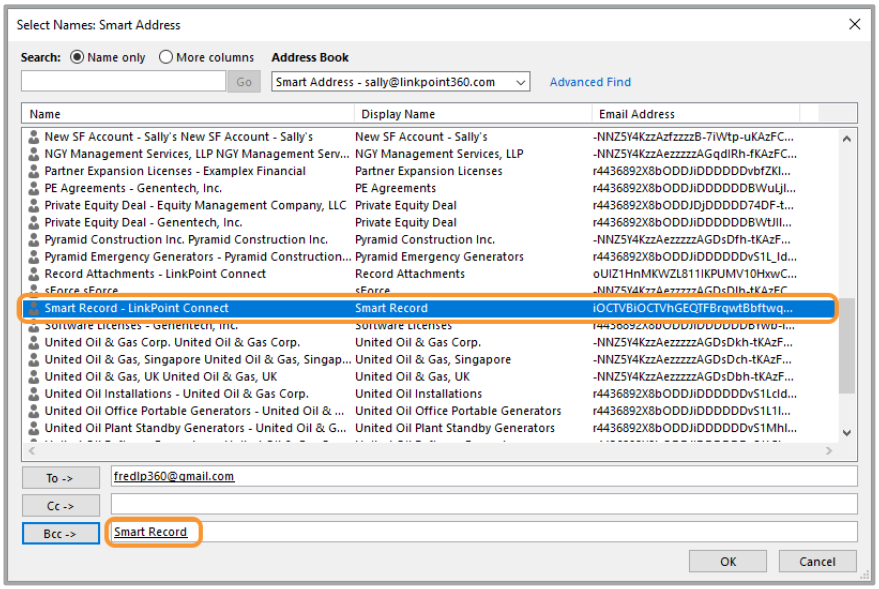
Tip: Once you have used a Smart Address once, it may appear in the history of your email application for easier future access. For Outlook users, begin typing the name of the Smart Address in the Bcc field to use a prior Smart Address. This functionality will depend on the email application you are using.

For mobile users, your application may permit you to search for a Smart Address as a contact by name. Begin entering the name of the Opportunity or Account to refine results and locate the correct Smart Address.

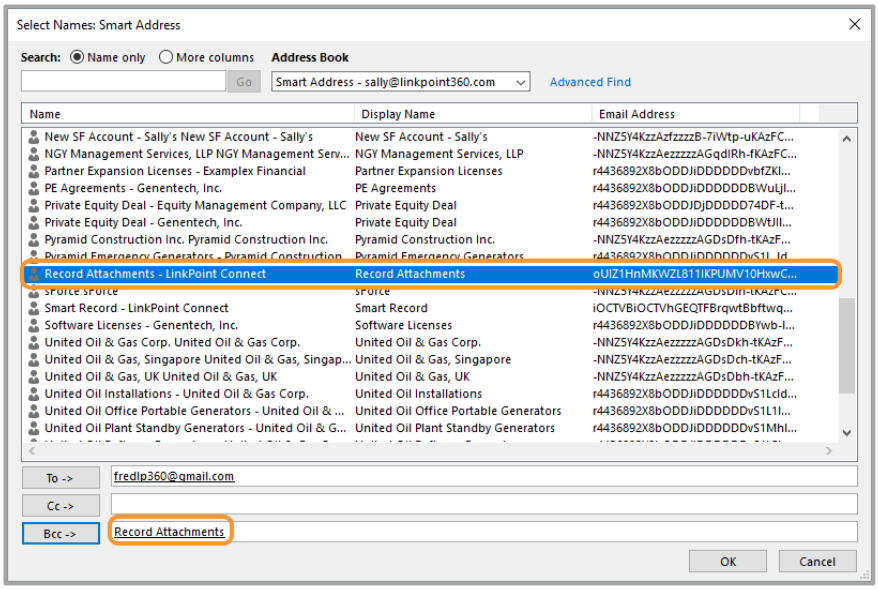
5 Insert the **Do Not Record** Smart Tag to prevent the email/calendar item from recording to Salesforce, even if the item would typically sync based on predefined sync criteria.



6 Insert the **Smart Record** Smart Tag to mark the email/calendar item for sync consideration in keeping with the user's predefined sync criteria.

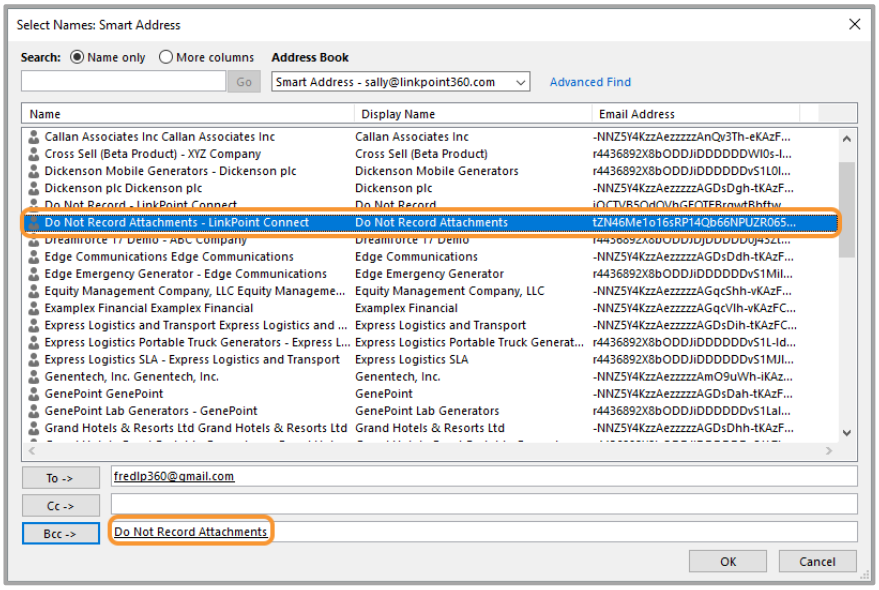


7 Insert the **Record Attachments** Smart Tag to record all of the attachments on the email if the email syncs based on the sync criteria.



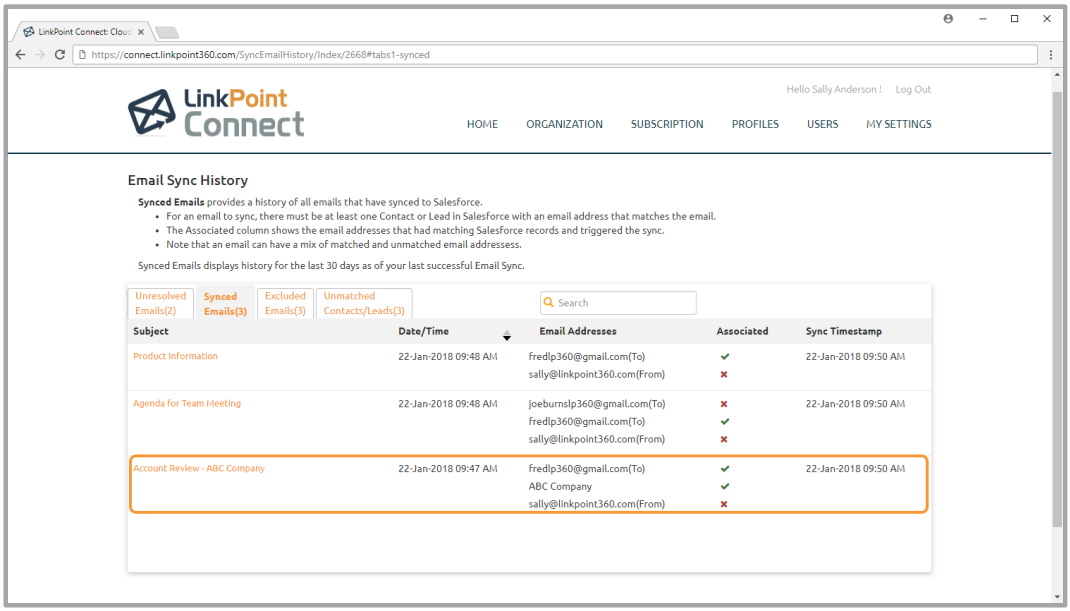
Tip: The Record Attachments Smart Tag is most useful for one-off selecting emails to record attachments. If you are using the Email Sync Setting to Automatically Record All Attachments, you do not need to use this Smart Tag.

8 Insert the **Do Not Record Attachments** Smart Tag to prevent the attachments on an email from recording to Salesforce, even if the option to Automatically Record All Attachments is enabled in the Email Sync settings.

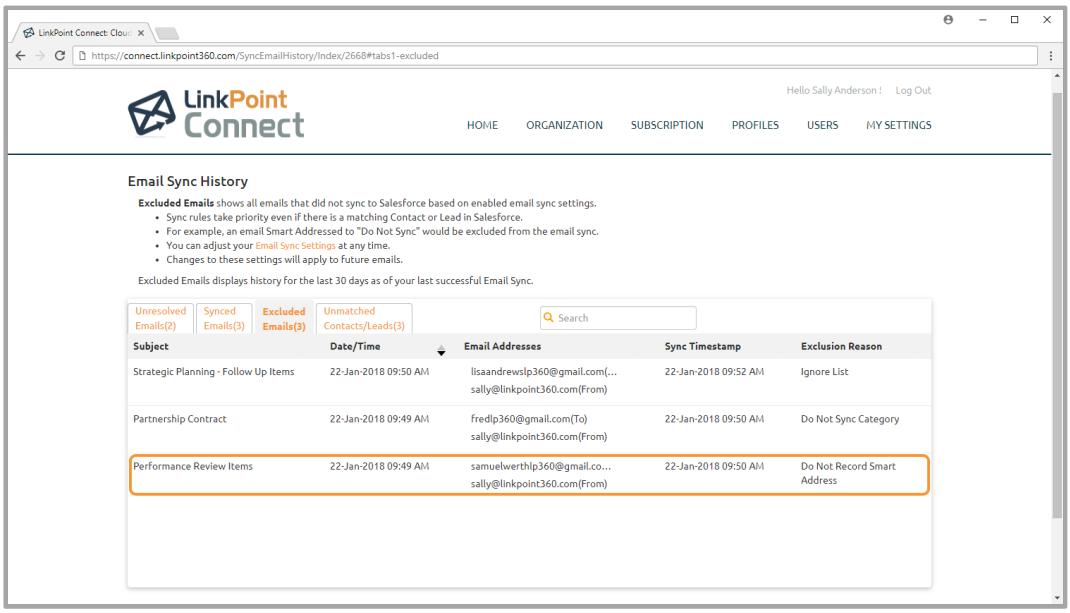


9 Finish composing the email or meeting invite and send when ready. With Email and/or Calendar Sync enabled, Cloud Edition will automatically detect the Smart Address and record the item to the cooresponding Salesforce record in accordance with the established sync settings.

Tip: You can review items that synced to Salesforce using Smart Address in the Email Sync History or Calendar Sync History. Smart Addresses are displayed in the Email Address column by name for your reference.



Smart Tags (i.e. Smart Record and Do Not Record) are not listed, but emails that sync or are excluded from sync due to using Smart Tags are noted in the Reason columns, where applicable.



Mapping Salesforce Objects for Smart Address

Cloud Edition's Email and Calendar Sync Jobs are designed to enable users to move data between Salesforce and Exchange and to associate these items to matching Salesforce Lead and Contact records where applicable (i.e. Salesforce "Who" records). In many instances, users also want the ability to associate emails and calendar items to additional Salesforce records such as Accounts, Opportunities, and Cases (i.e. Salesforce "What" records).

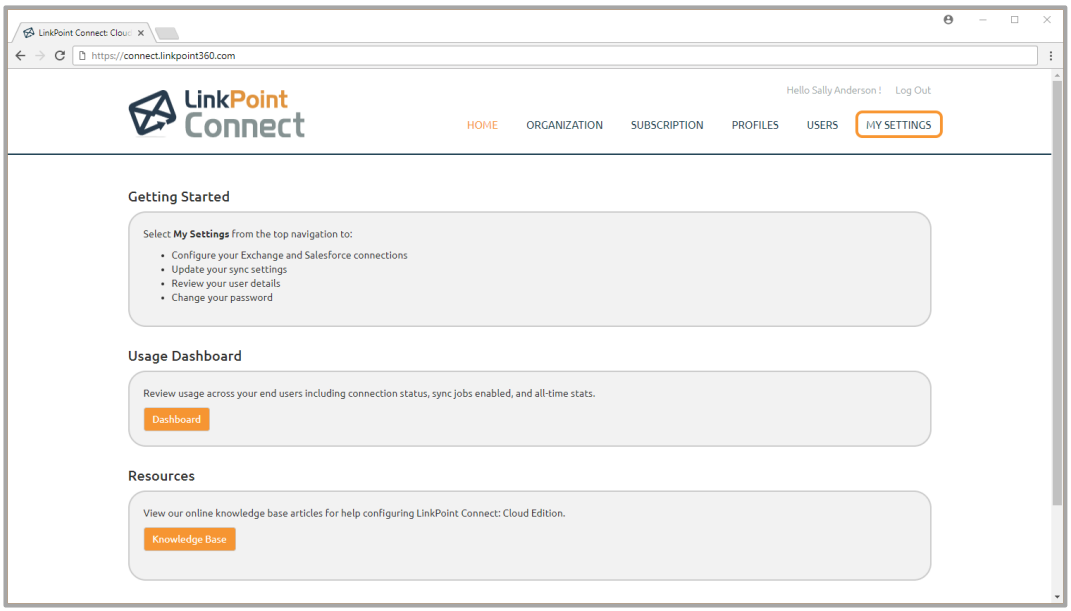
Smart Address offers users the ability to tag emails and calendar items and associate them with Salesforce "What" records as part of the sync process. To do this, Smart Address Sync creates a separate Contact folder within Exchange and generates a unique email address for each object record that is enabled. As users send emails or create meetings, they can add Smart Addresses from their Address Book or Contacts folder wherever they have access to their Exchange account (desktop, web mail, mobile device, etc.). Cloud Edition detects Smart Addresses and uses them to relate the emails and calendar items to additional Salesforce records. In this section, you will learn how to map Salesforce objects for use as Smart Addresses.

Warning: Smart Address functionality is only available when working with Email and Calendar Sync. Smart Addresses cannot be appended to Task or Contact records from Exchange to create associations in Salesforce.

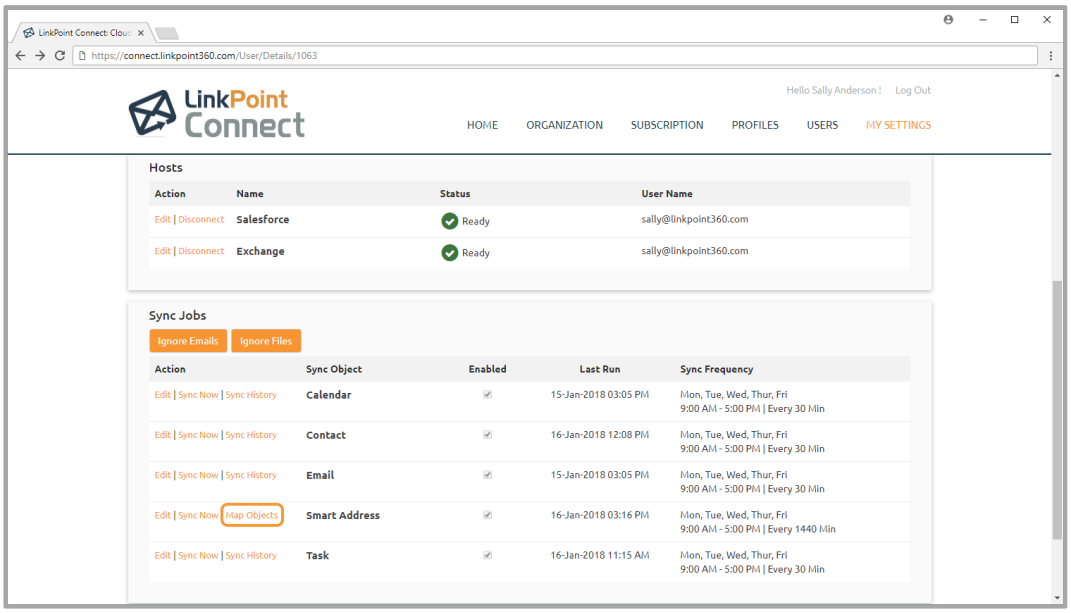
Warning: Cloud Edition Admins have the ability to set default sync settings and/or lock down these settings to prevent end user override. Your instance of Cloud Edition may not allow you to change any/all of the settings described in this section, depending on how your Admin has configured your access. Settings that are preset and locked by an Admin are visible to end users but are grayed out and cannot be edited.

Example: In this example, we will demonstrate how to map new objects for use with Smart Addresses using sample data. Your Salesforce objects will vary based on how your instance of Salesforce is configured.

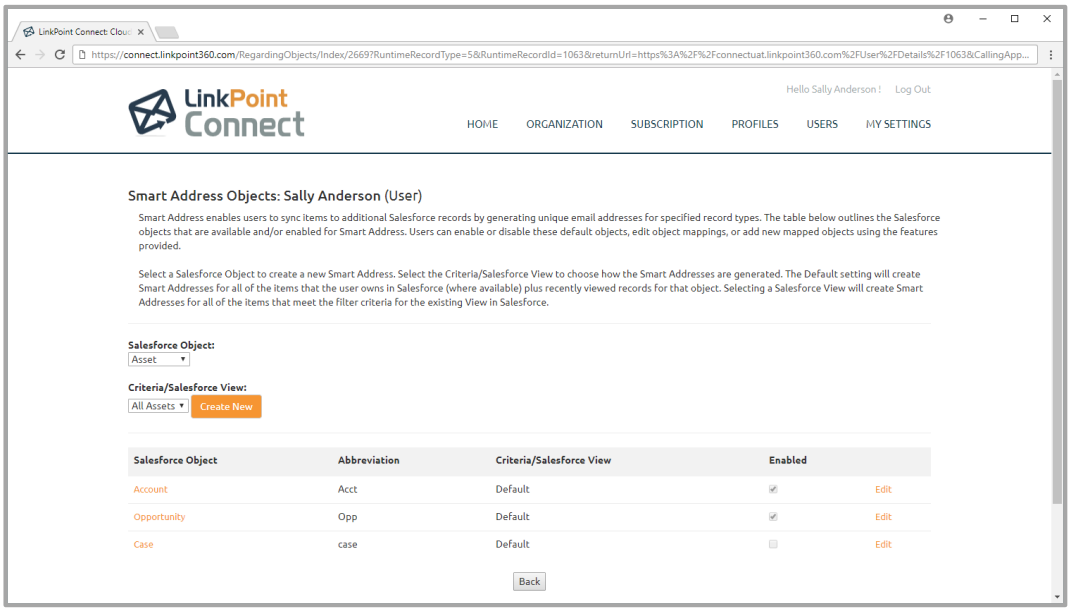
1. Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.



2 Locate the **Sync Jobs** section and the **Smart Address Sync Object**. Then, select the **Map Objects** link.



3 Review the list of existing mapped objects. The table outlines the Salesforce objects that are available and/or enabled for Smart Address use along with the abbreviation that will appear at the beginning of the Smart Address name in the Exchange contact list and the Criteria or Salesforce View being used to populate the Smart Addresses.



Tip: Smart Addresses are generated by default for the Account and Opportunity objects in Salesforce.

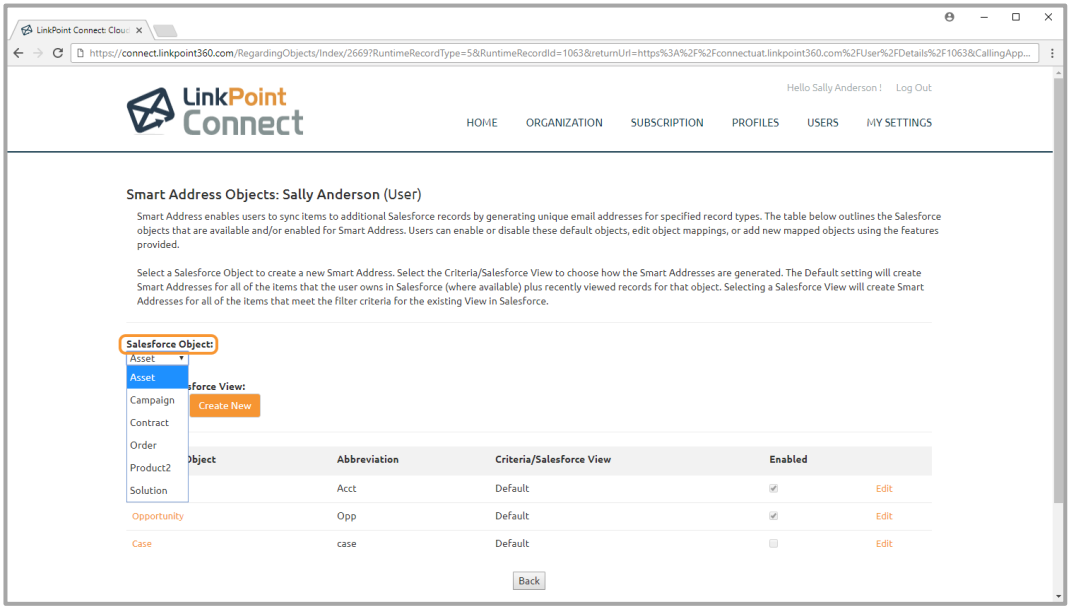
- **Accounts:** Smart Address will create a unique email address for every Account the user owns and every Account on the user's Most Recently Viewed list in Salesforce. This mapping is enabled by default.
- **Opportunities:** Smart Address will create a unique email address for every Opportunity that the user owns and every Opportunity on the user's Most Recently Viewed list in Salesforce. This mapping is enabled by default.
- **Cases:** Smart Address is designed to detect the Salesforce Case object but is disabled by default. When enabled, Smart Address will create a unique email address for every Case the user owns and every Case on the user's Most Recently Viewed list in Salesforce.

Tip: The number of Smart Addresses generated for an end user are set to a maximum count of 3,000 per record type. In the event that the maximum number would be exceeded, priority to create Smart Addresses is given to items included in the Salesforce Recently Viewed table. The remainder are populated based on the records owned by the user, sorted by Last Viewed Date and Created Date, to give priority to more recent items.

Warning: Smart Address mapping is presented on the Objects page as *Enabled*, but Smart Addresses will not be available for use within Exchange unless you have enabled the Smart Address Sync Job.

Additional Resources: Learn more about enabling Smart Address in the **Configuring Smart Address** section of this User Guide.

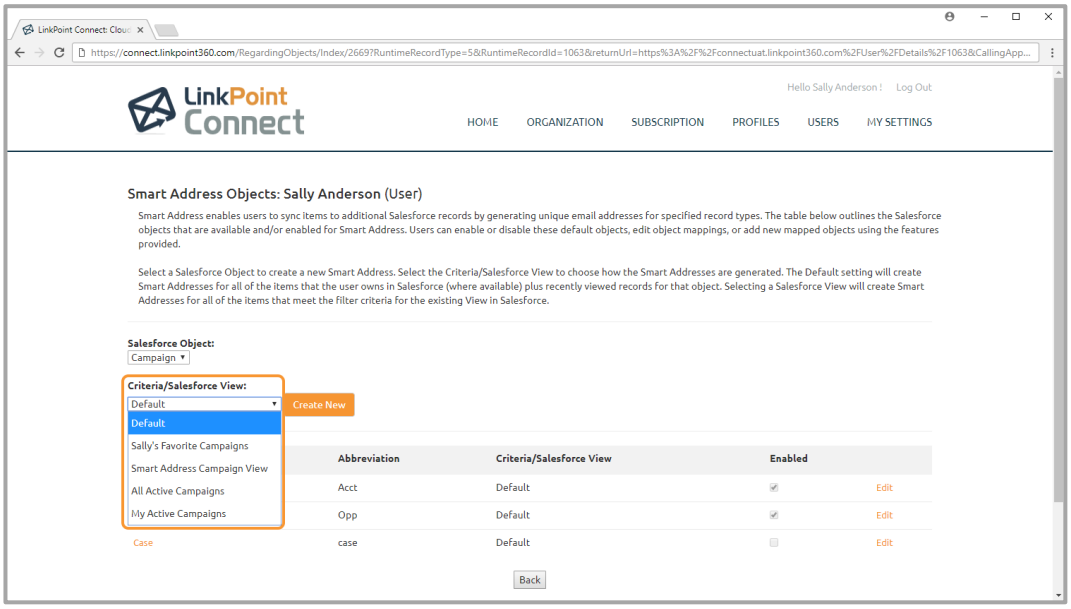
4 Select a new **Salesforce Object** from the drop-down list. The available Objects will vary by user and will only be presented as an option if the user has permission to view the Object in Salesforce.



Warning: When mapping objects and their corresponding fields for end users as an Admin, be aware that Cloud Edition is not able to validate end user permissions within Salesforce. Cloud Edition will not prevent an Admin from mapping an object(s) or field(s) that some users may not have access to in Salesforce. The end user will not be able to work with restricted objects as Smart Addresses, preserving the user-level permissions for Salesforce data access. Mapping to specific object fields on a Salesforce record that an end user does not have access to in Salesforce will result in the Smart Address lacking field-level data.

5

Select the **Criteria/Salesforce View** to use when generating the Smart Addresses for the selected Salesforce Object. Choose Default to work with default Smart Address criteria. Choose a Salesforce View from the list to create Smart Addresses based on the View's criteria.

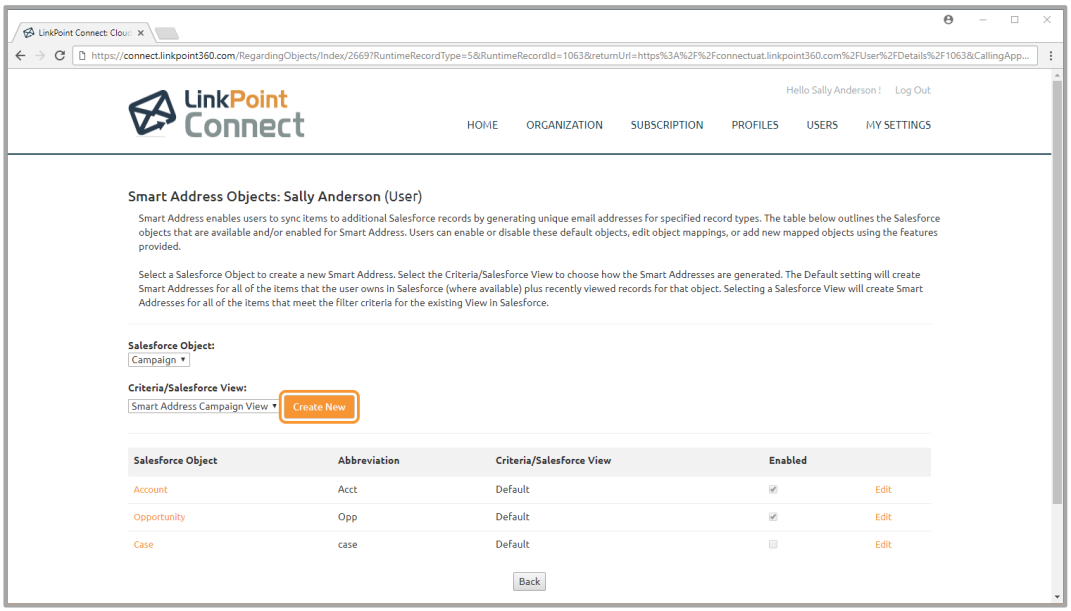


Tip: Smart Address uses specific filters and criteria to create unique Smart Addresses for each user.

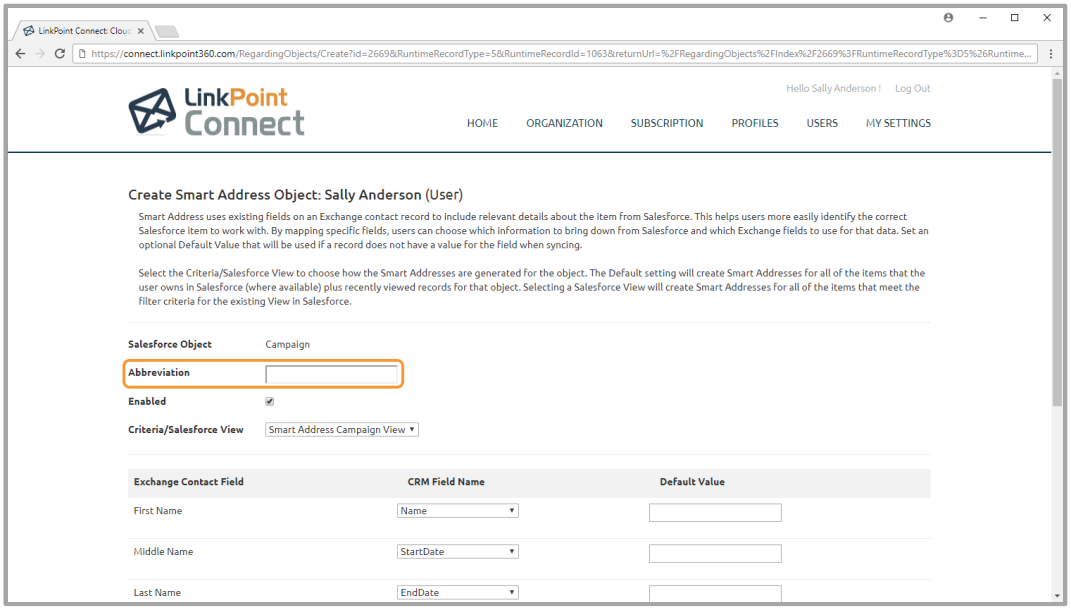
- **Default Criteria:** Created on a per object basis for all records a user *owns* in Salesforce. (i.e. a user will have a Smart Address for every Account they own) and for all records that appear on the user's *Most Recently Viewed* list in Salesforce for the object, regardless of whether they own the account (i.e. a user viewed a colleague's Opportunity but does not own it).
- **Salesforce View:** Created based on the filters used to populate the View in Salesforce. End Users can select from Public Views as well as any view, including Private Views, they have access to in Salesforce. Any record included in the View can be a Smart Address, regardless of ownership or recently viewed status.
- **Additional Filters:** LinkPoint360 Professional Services can add filtering to exclude Smart Addresses based on certain criteria, such as excluding items that have a Status of Closed. Contact your Account Executive with any questions regarding Cloud Edition customization.

Warning: Admins configuring Smart Address using Salesforce Views will only have access to Public Views that can apply to all users. If a View is deleted in Salesforce, the Smart Addresses will no longer populate, and the Admin will need to select a different View for the Object.

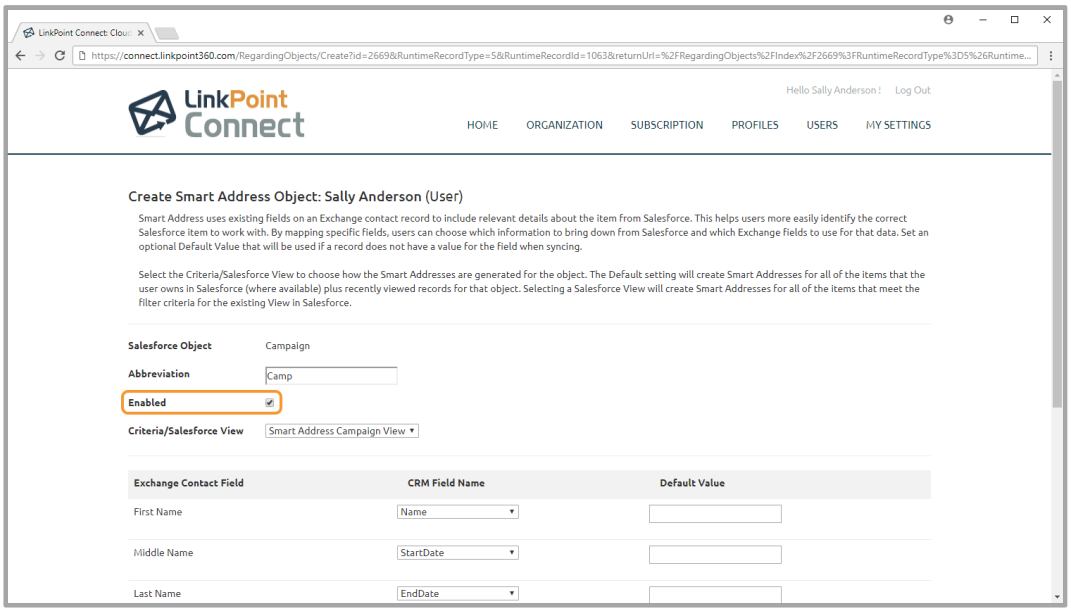
6 Click **Create New** to continue.



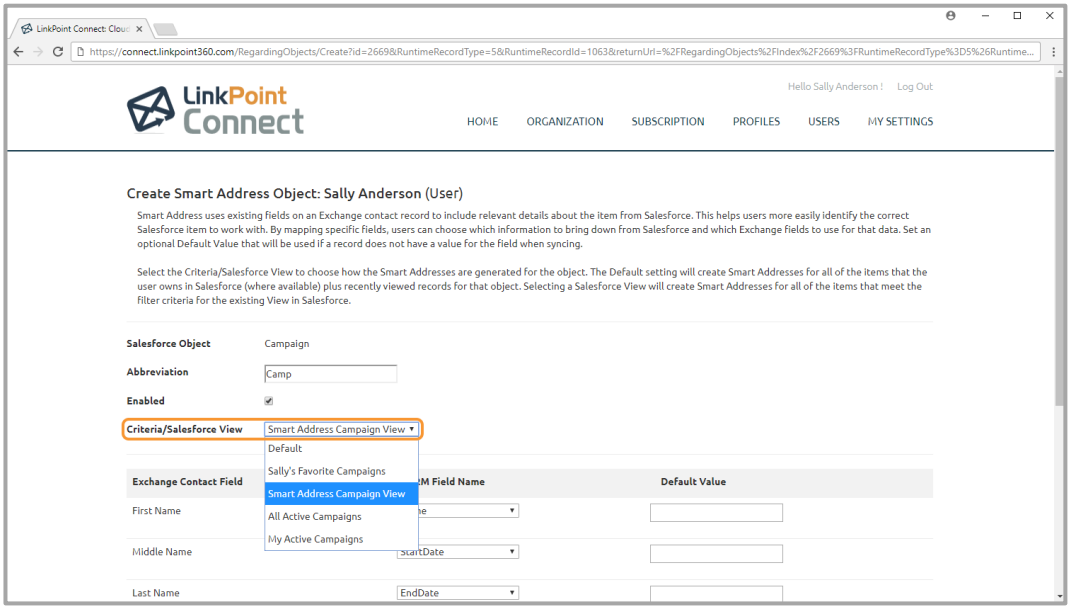
7 Enter an **Abbreviation** to be used when creating and labeling the Smart Address in Exchange.



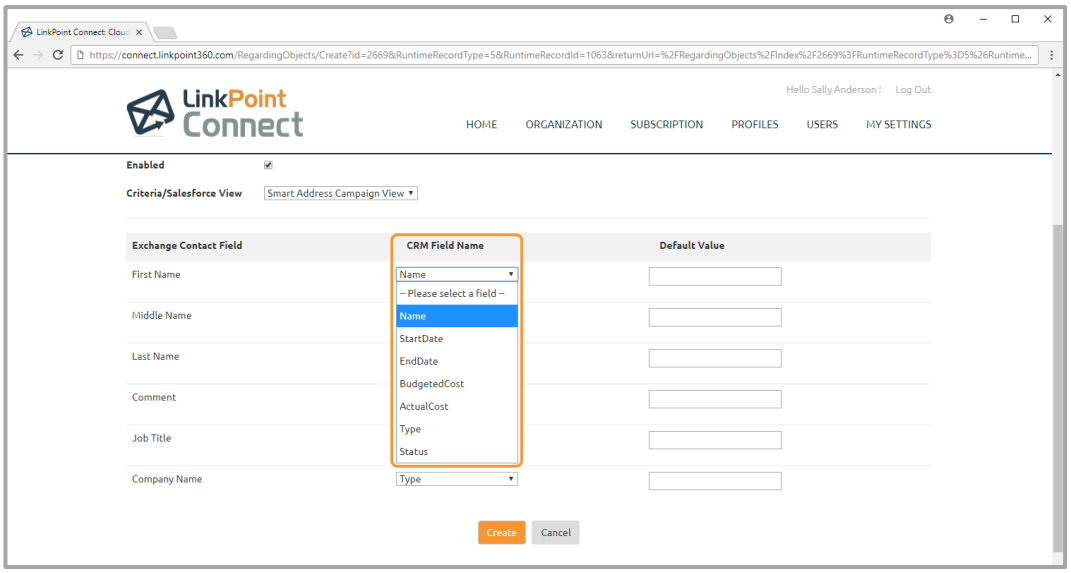
8 Select the **Enabled** checkbox to activate the new object and include it with the next Smart Address sync.



9 Select the **Criteria/Salesforce View** to use to generate the Smart Addresses for the selected Object.

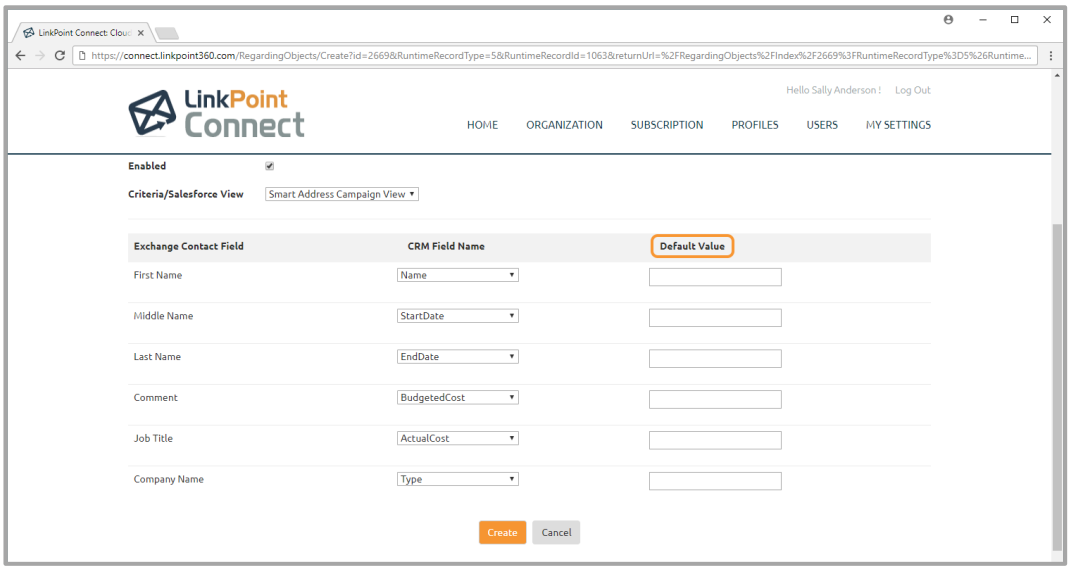


10 Select the optional **CRM Field Name** to determine which Exchange fields should be used for displaying specific Salesforce information.



Tip: Smart Address uses existing fields on an Exchange contact record to include relevant details about the item from Salesforce. This helps users more easily identify the correct Salesforce item to work with. By mapping specific fields, users can choose which information to bring down from Salesforce and which Exchange fields to use for that data. While not required, setting at least one CRM Field Name is recommended.

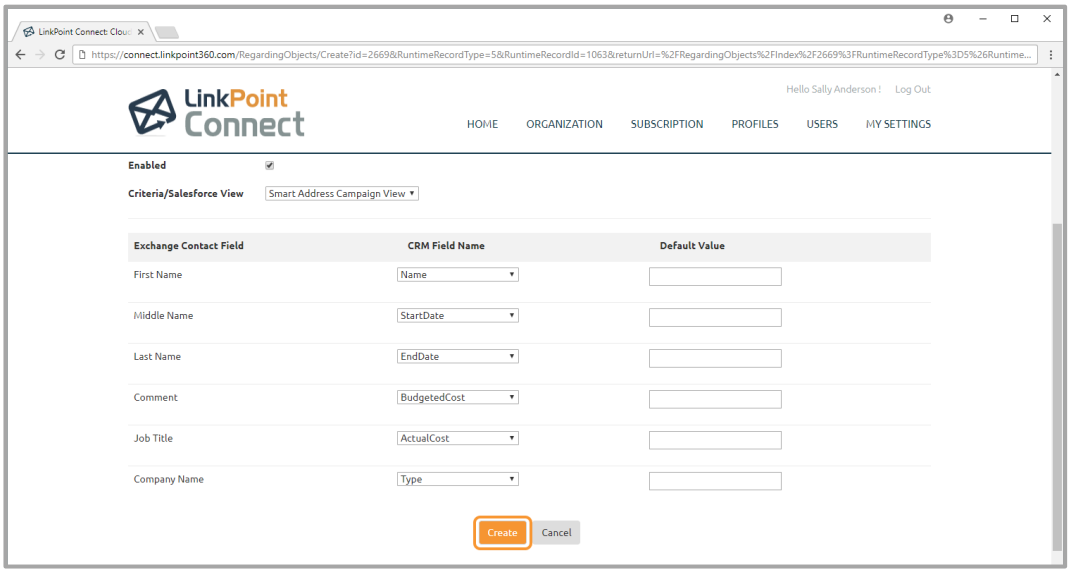
11 Set an optional **Default Value** that will be used if the Salesforce record does not have a value for the field when syncing.



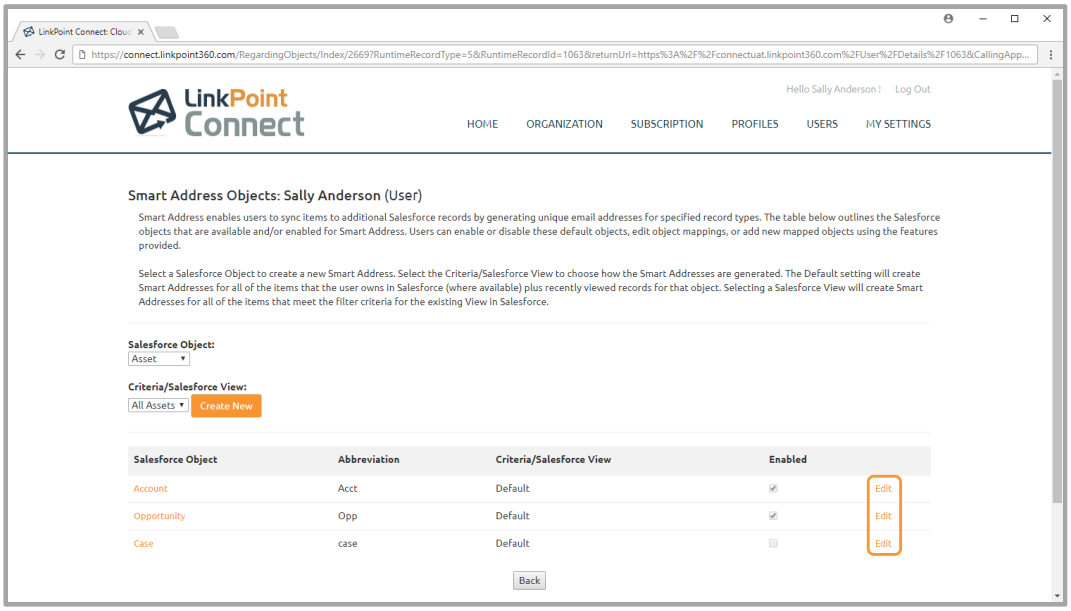
Tip: Admins configuring a Smart Address at the Subscription or Profile Level have the option to lock all of the configuration options. Note that locking a field will prevent end users from being able to make changes.

Warning: Smart Addresses with locked values for Enabled and Criteria/Salesforce View can prevent end users from making changes if they no longer have access to the configured object.

12 Click the **Create** button when finished to generate the Smart Address object. The new Smart Addresses will be included in the Smart Address Exchange folder and will be available on your mobile device (wherever your Exchange account is connected) during the next scheduled Smart Address Sync Job.



Tip: You can edit any existing Smart Address object mapping by returning to the Smart Address Objects page and selecting the **Edit** link for a specific Salesforce Object.



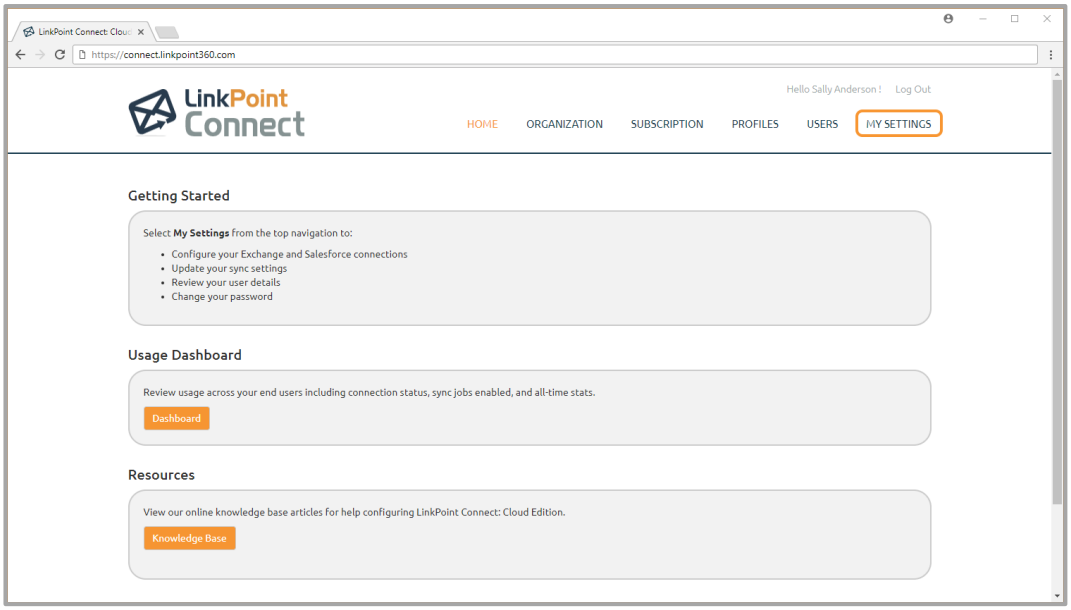
Preventing Items from Syncing

Configuring the Ignore List

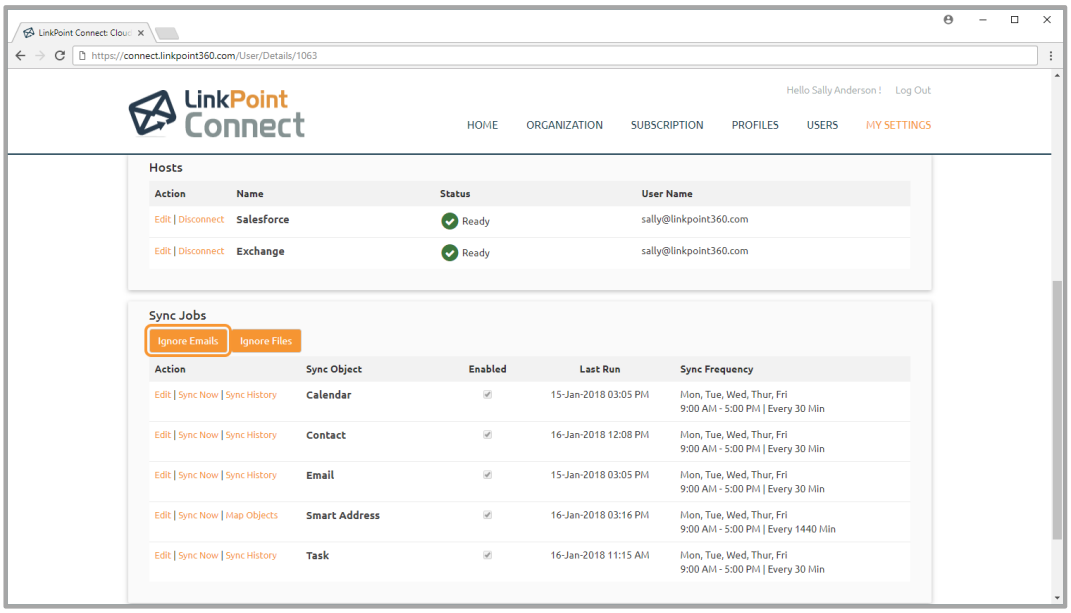
Cloud Edition syncs emails and calendar items in part by referring to and matching based on sender and recipient email addresses. The Ignore List enables users to exclude specific email addresses and domains from future sync consideration and prevent the item from being related to the matching Salesforce records. Ignore List settings may not prevent an entire item from syncing. If an item has multiple email addresses or domains, the item may still sync to other matching Salesforce records. The Ignore List ensures that the item will not sync only to the Salesforce record that has a matching email address or domain. In this section, you will learn how to add email addresses and domains to the Ignore List.

Warning: Email addresses and domains can be added to the Ignore List at the Subscription, Profile, or User level. In this section, we will demonstrate the Ignore List as an end user on the My Settings screen. The process is identical for Admins making changes on other levels of the hierarchy. However, any changes made by an Admin to the Subscription Ignore List or Profile Ignore List cannot be overridden by an end user and will have a direct impact on how their data syncs.

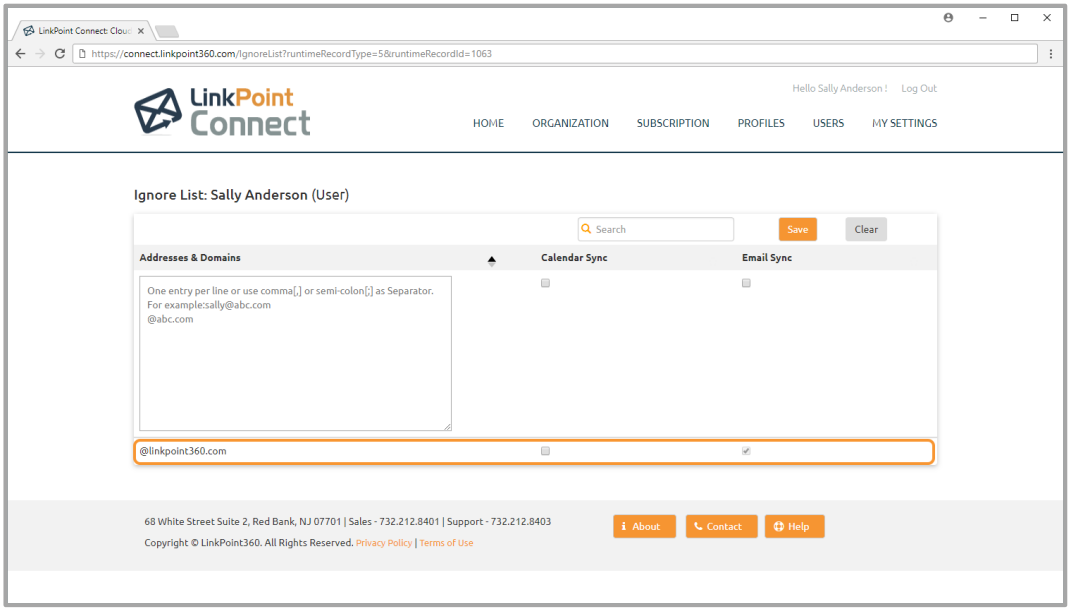
1. Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.



2 Locate the **Sync Jobs** section and click the **Ignore Emails** button.

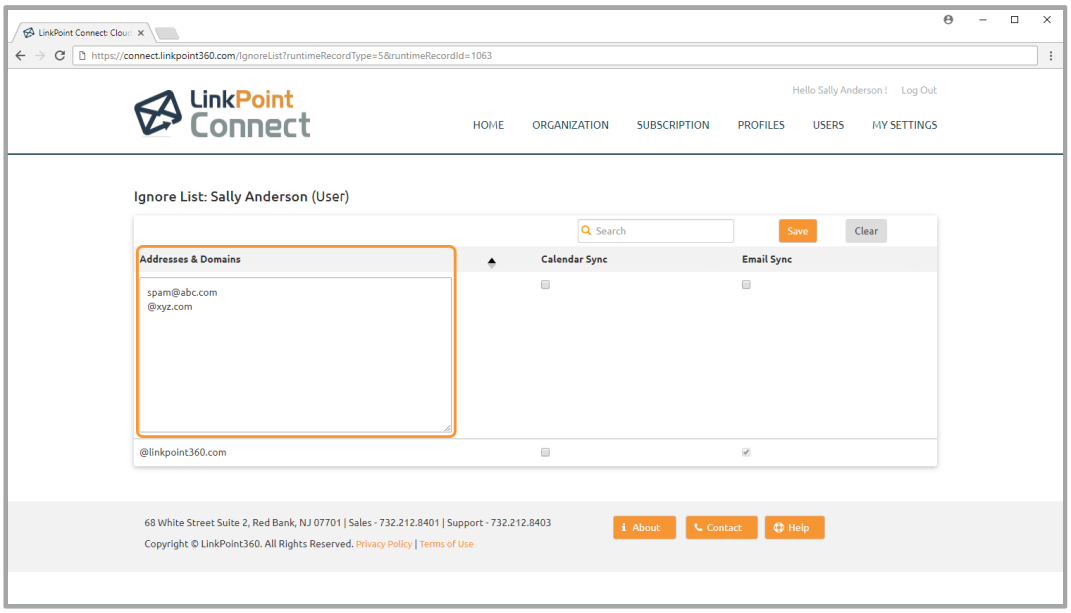


3 Note that the end user's email domain is automatically added to the Ignore List for Email Sync when the new user account is created.

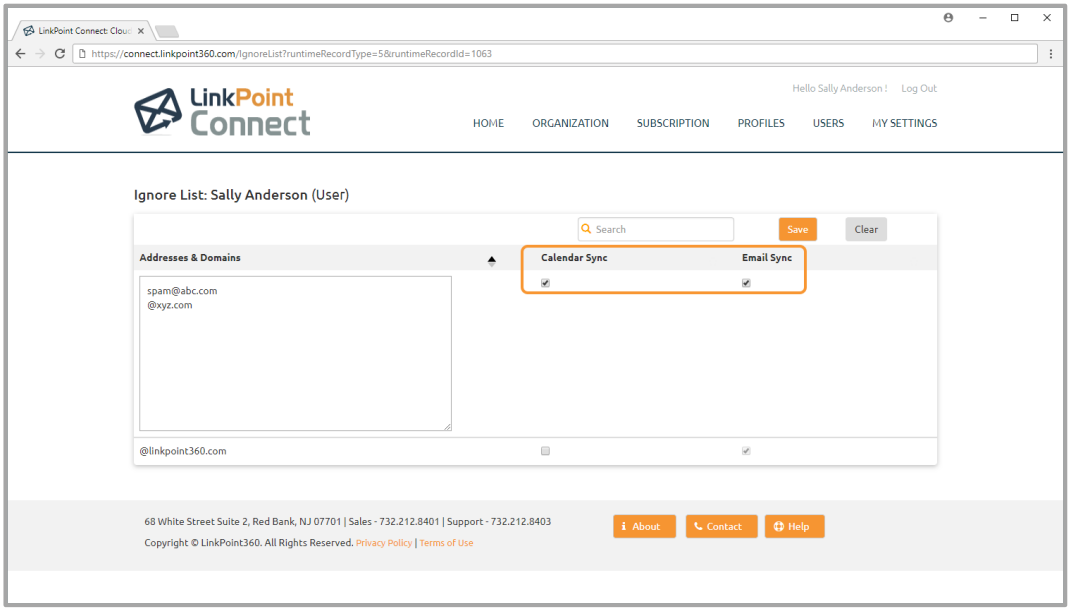


Tip: Excluding the user's email domain by default for Email Sync helps organizations that send internal emails that would otherwise be listed as unresolved in the Sync History because Users (internal staff) are not set up as Leads or Contacts in Salesforce. If your organization includes its Salesforce Users as Contacts and you would like to sync emails to these records, your Admin can remove your email domain from the Ignore List.

4 Enter an email address or domain in the text entry box. You can add more than one entry with one item per line or by separating items with commas or semicolons.



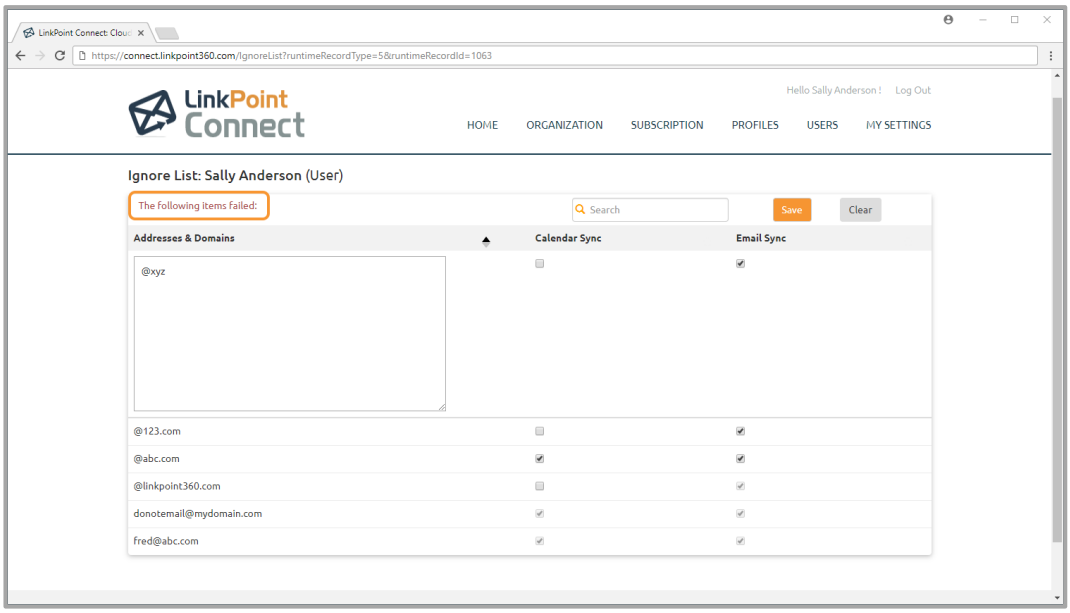
5 Select the checkbox for **Calendar Sync** and/or **Email Sync** for the Ignore List application.



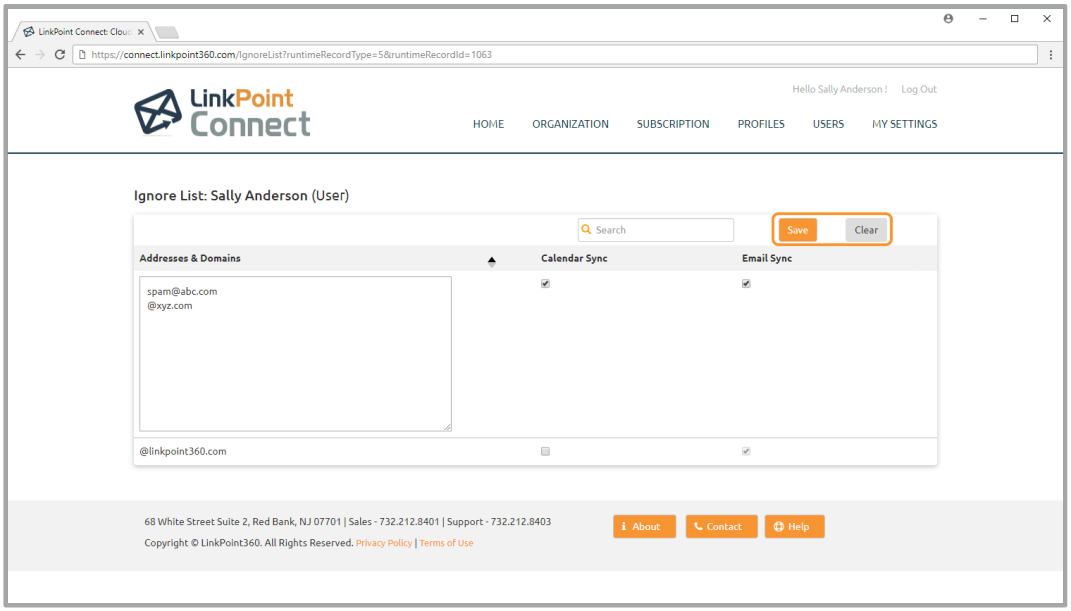
Tip: If you enter more than one email address and/or domain and make an Ignore List selection, the settings will apply to all of the items submitted, as if performing a bulk create and update.

Tip: Setting separate Ignore List options for Email and Calendar Sync provides flexibility to mirror the sync to your workflow. For example, you may wish to ignore items from a specific sender during the email sync since this correspondence is not relevant to your business. But you may not want to ignore items from the same sender during the calendar sync so that your calendar accurately reflects your availability.

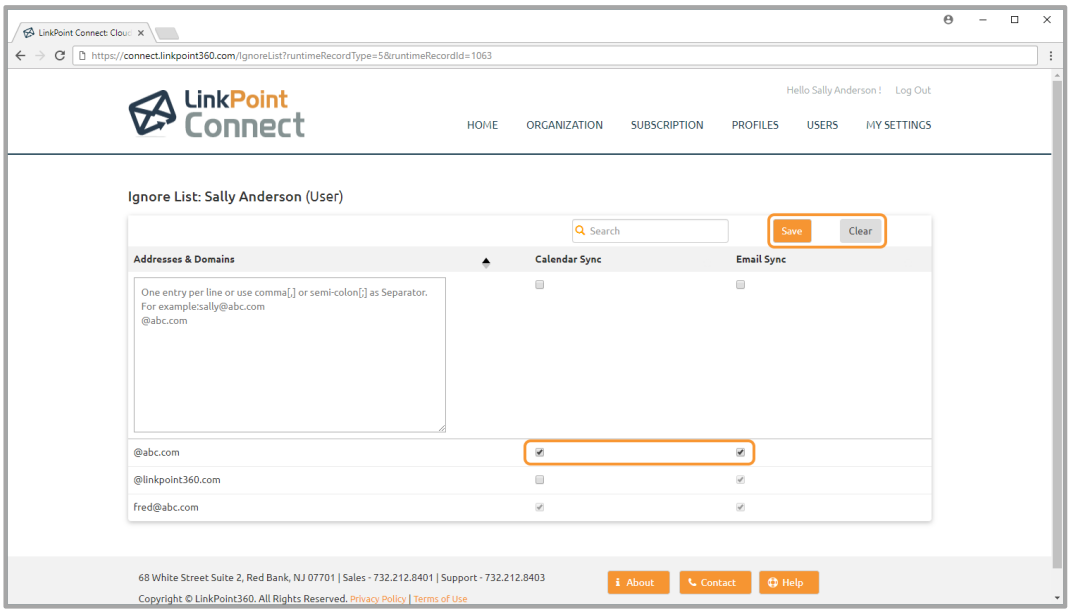
Warning: When a mix of valid and invalid items are entered in the Ignore List, the valid items are saved to the Ignore List and the invalid items remain in the text box. You must ensure all email addresses and domains fit the required format in order to add them to the list when you see the message **The following items failed**.



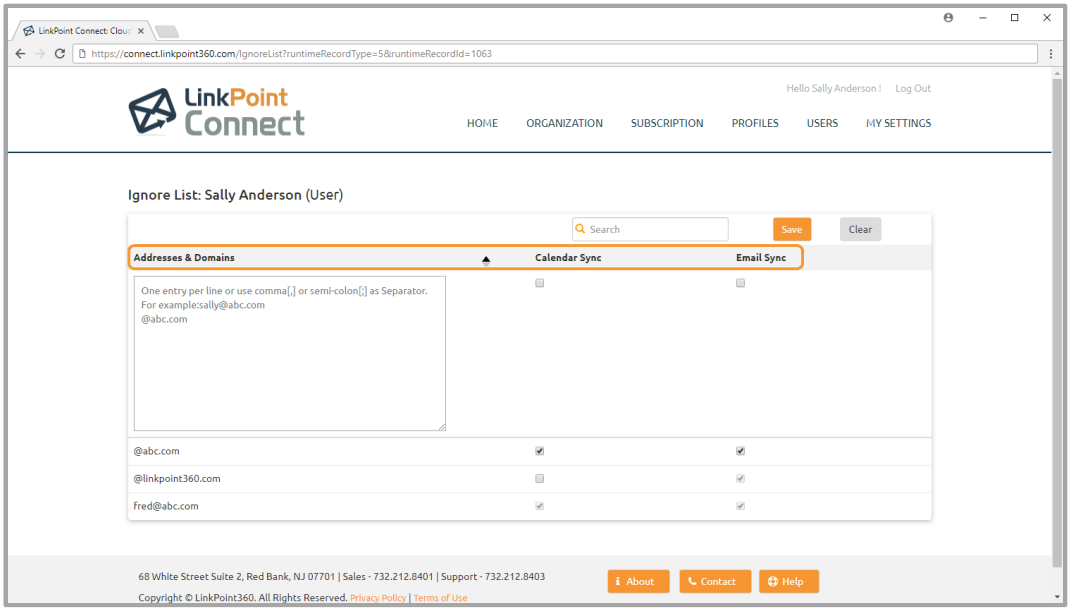
6 Click the **Clear** button to abandon your changes, or click the **Save** button to confirm the changes.



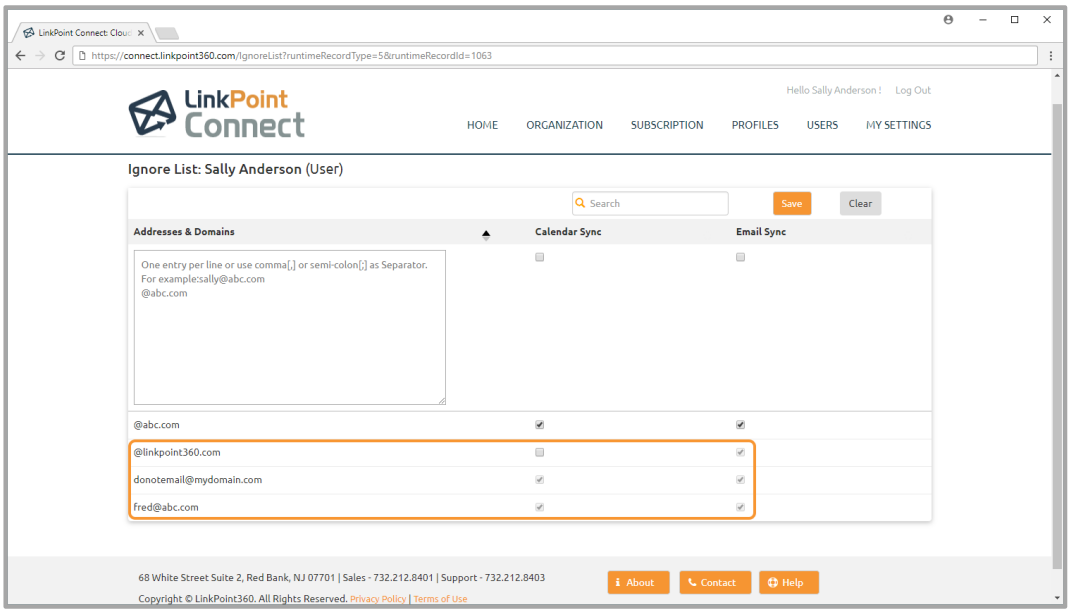
7 Deselect the **Calendar Sync** or **Email Sync** checkboxes for email addresses and domains to remove them from the Ignore List. Click the **Clear** button to abandon your changes, or click the **Save** button to confirm.



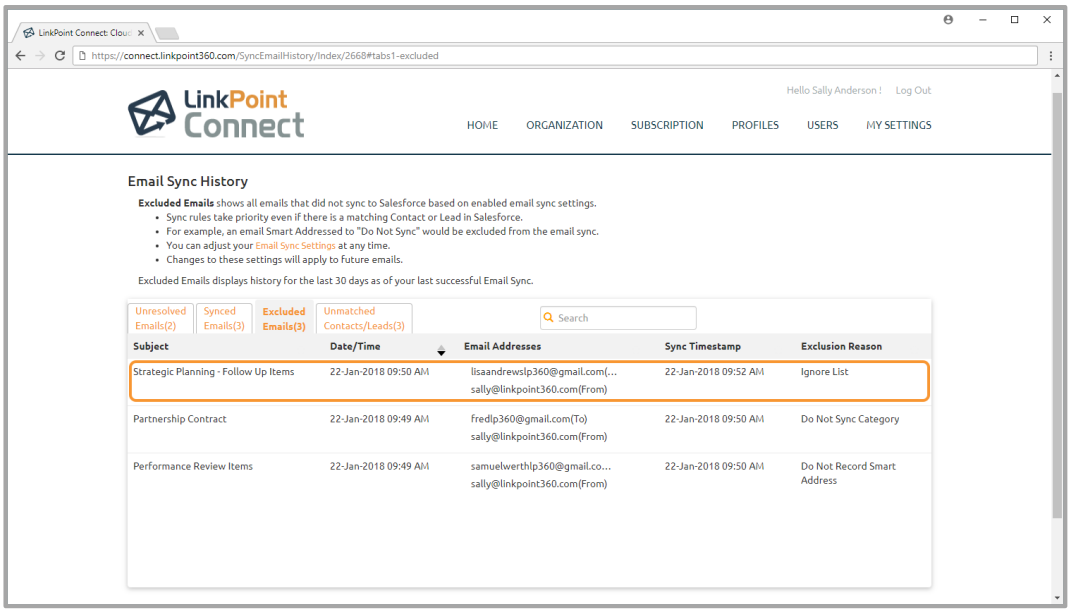
8 Sort the Ignore List by clicking the column headers to view items in ascending or descending order. Search partial or full terms to filter the list and find specific items more quickly.



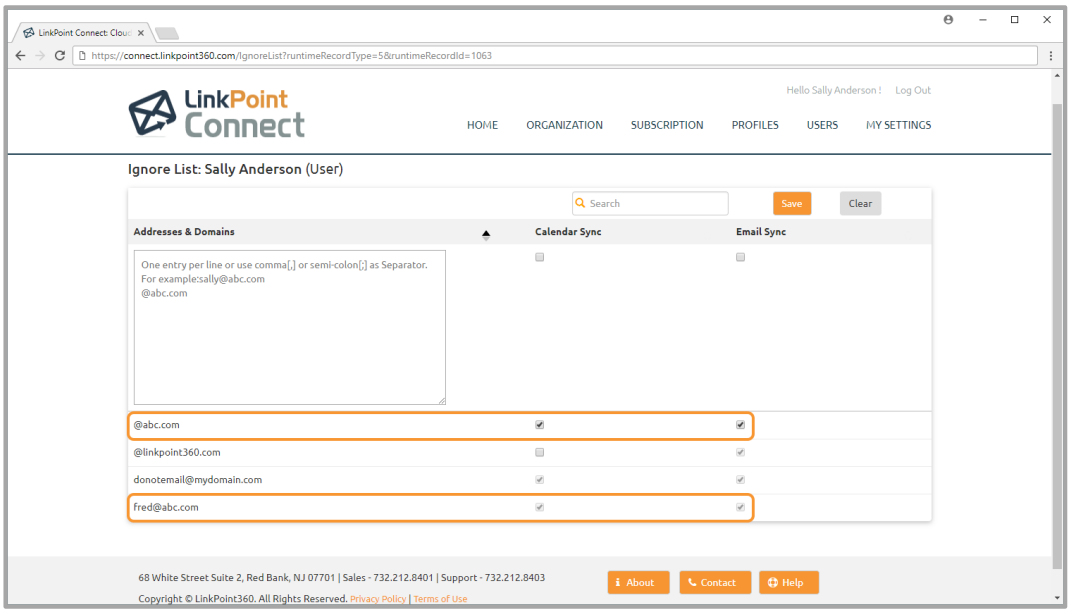
Tip: Email addresses and domains that appear in the list with a grayed out checkbox indicate that the item was added to your Ignore List by the Admin at a higher level in the system. You are able to view that the setting has been established, but you cannot deselect the option. If the item has been set to Ignore for one sync type, you do have the ability to add it to the second sync type.



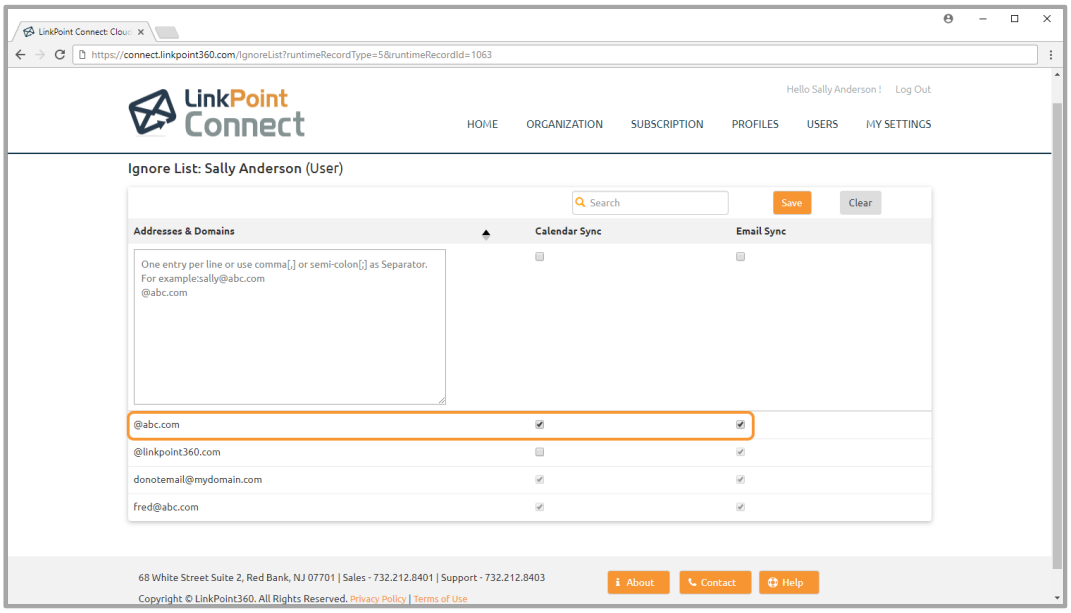
Tip: Emails and calendar items impacted by Ignore List settings during a sync can be reviewed in the Email Sync History and Calendar Sync History. If an item is excluded from sync due to an Ignore List setting, the Exclusion reason will be listed as Ignore List. If an email address or domain has been set to your Subscription's Global Exclusion List, the item will not sync and the Exclusion reason will be listed as Global Exclusion List. Please contact your Admin with questions regarding the Global Exclusion List.



Tip: You will not be able to deselect Ignore options for an email address if the domain is also included as a separate Ignore List item. For example, fred@abc.com cannot be deselected from Email Sync if the domain @abc.com is also set to ignore for Email Sync. Remove the selection for the domain and then edit the selection for the specific email address.



Tip: You must deselect the options for both Calendar Sync and Email Sync in order to remove an email address or domain from the list completely.

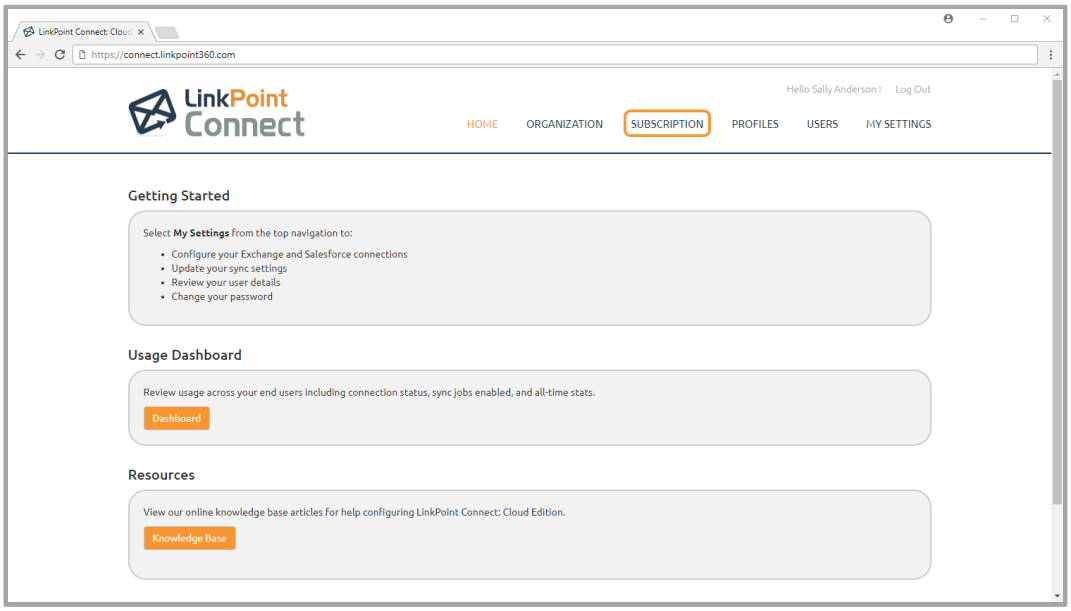


Configuring the Global Exclusion List

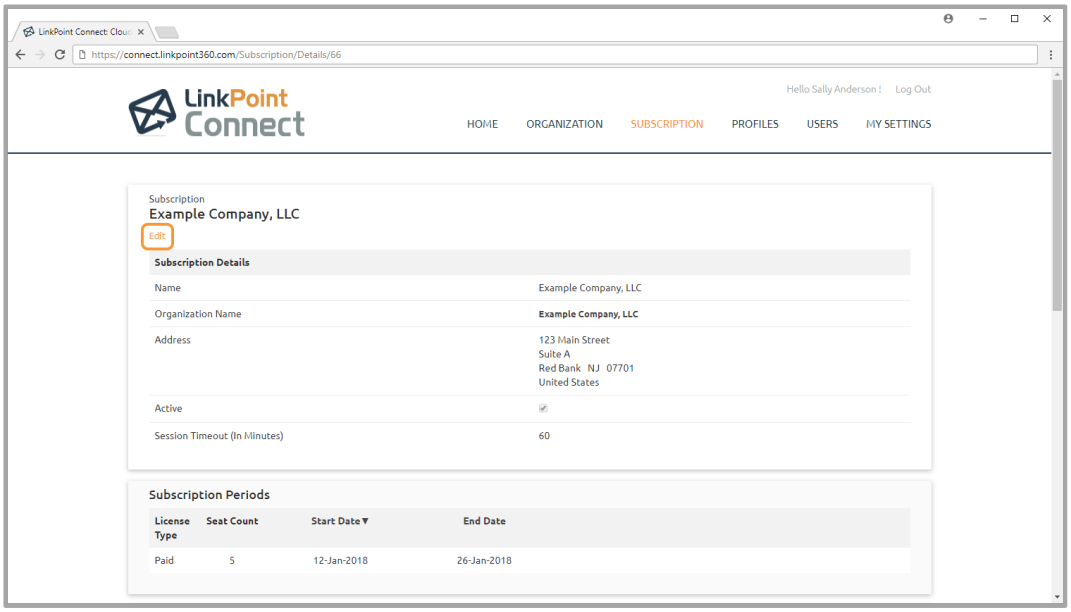
Cloud Edition syncs emails and calendar items in part by referring to and matching based on sender and recipient email addresses. The Global Exclusion List enables Admins to prevent emails and calendar items from specific email addresses or domains from syncing between systems. If an item has more than one email address or domain but at least one matches a listing on the Global Exclusion List, the entire item will be excluded from the sync regardless of any other matching Salesforce records or sync settings. In this section, you will learn how to add email addresses and domains to the Global Exclusion List.

Warning: The Global Exclusion List is accessible at the Subscription level to Admins. Changes made to the Global Exclusion List will affect all end users across all Profiles for that Subscription. Additions to the Global Exclusion List are not reflected in the Ignore List or visible to end users. End users may not be aware that an email address or domain has been excluded unless they review the Email Sync History or Calendar Sync History.

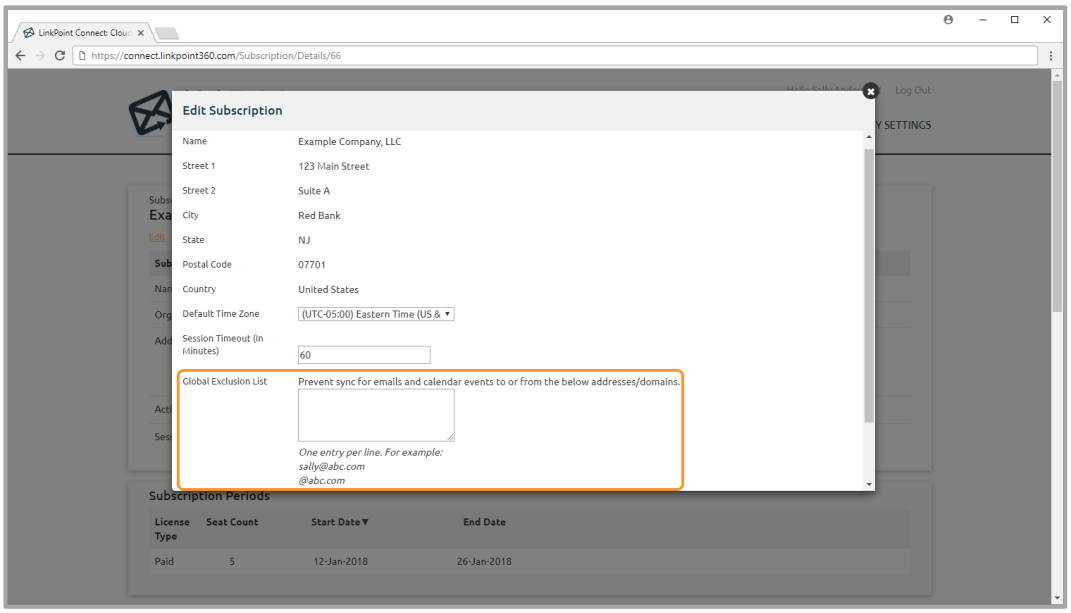
1. Log in to Cloud Edition and select the **Subscription** navigation option.



2 Locate the **Subscriptions** section, and select the **Edit** link for a Subscription.

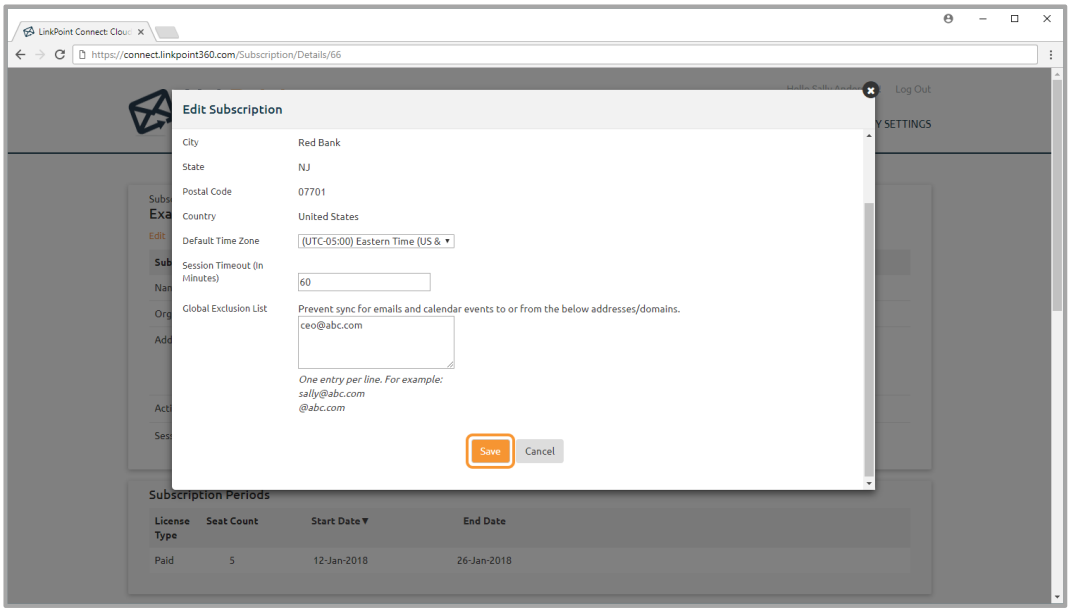


3 Enter the email address(es) and/or domains that should be prevented from syncing to the Global Exclusion List text box. Note that you can add multiple entries but only list one item per line.



Tip: Any items sent to or from these email addresses and domains will be completely excluded from any sync jobs, even if they meet other established sync criteria or there are other matching Salesforce records.

4 Click the **Save** button to finalize the changes.



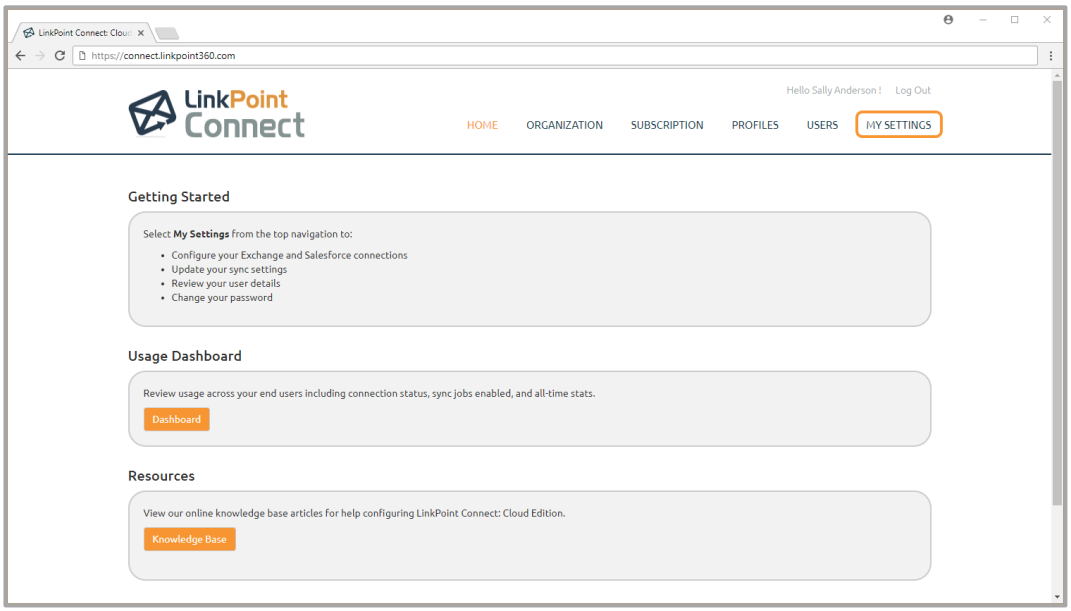
Configuring the Ignore Attachments List

Cloud Edition records attachments on emails that are recorded to Salesforce either automatically with an Email Sync Setting or one-off using the Record Attachments Smart Tag. Attachments can be excluded from syncing to Salesforce by using the Do Not Record Attachments Smart Tag. The Ignore Attachments List enables users to exclude specific file names and file types from future sync consideration and prevent the items from being recorded to Salesforce. If an email has multiple attachments, only the attachments that fit the criteria in the Ignore Attachments List will be excluded. In this section, you will learn how to add file names and file types to the Ignore Attachments List.

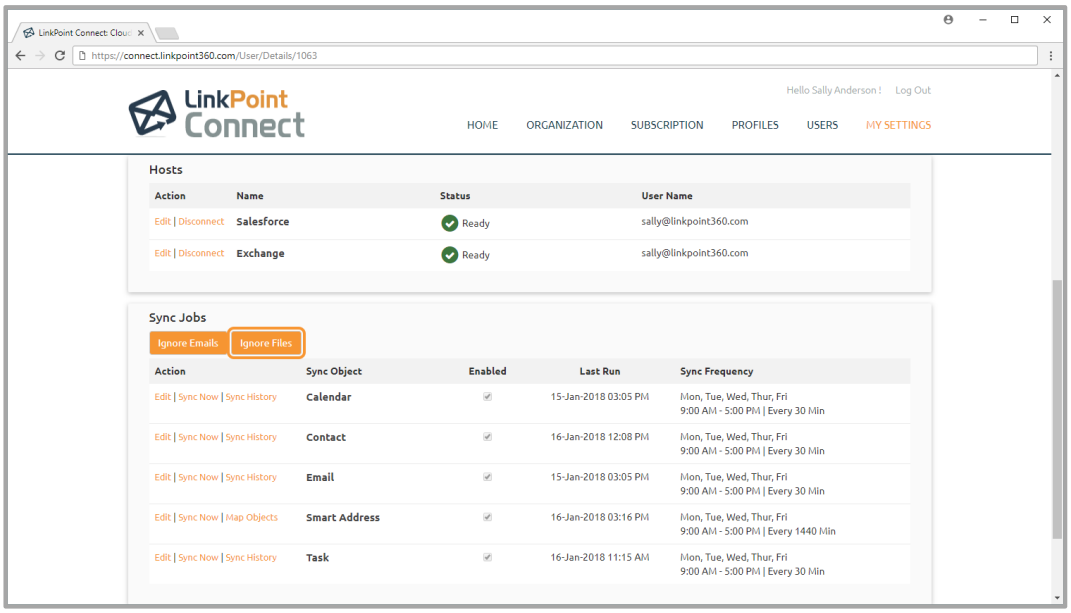
Warning: File names and file types can be added to the Ignore Attachments List at the Subscription, Profile, or User level. In this section, we will demonstrate the Ignore List as an end user on the My Settings screen. The process is identical for Admins making changes on other levels of the hierarchy. However, any changes made by an Admin to the Subscription Ignore List or Profile Ignore List cannot be overridden by an end user and will have a direct impact on how their data syncs.

Tip: Attachments that do not exceed 5 MB will sync to Salesforce. Due to Salesforce restrictions on file sizes, files larger than 5 MB will not sync. However, the email content will still sync to Salesforce.

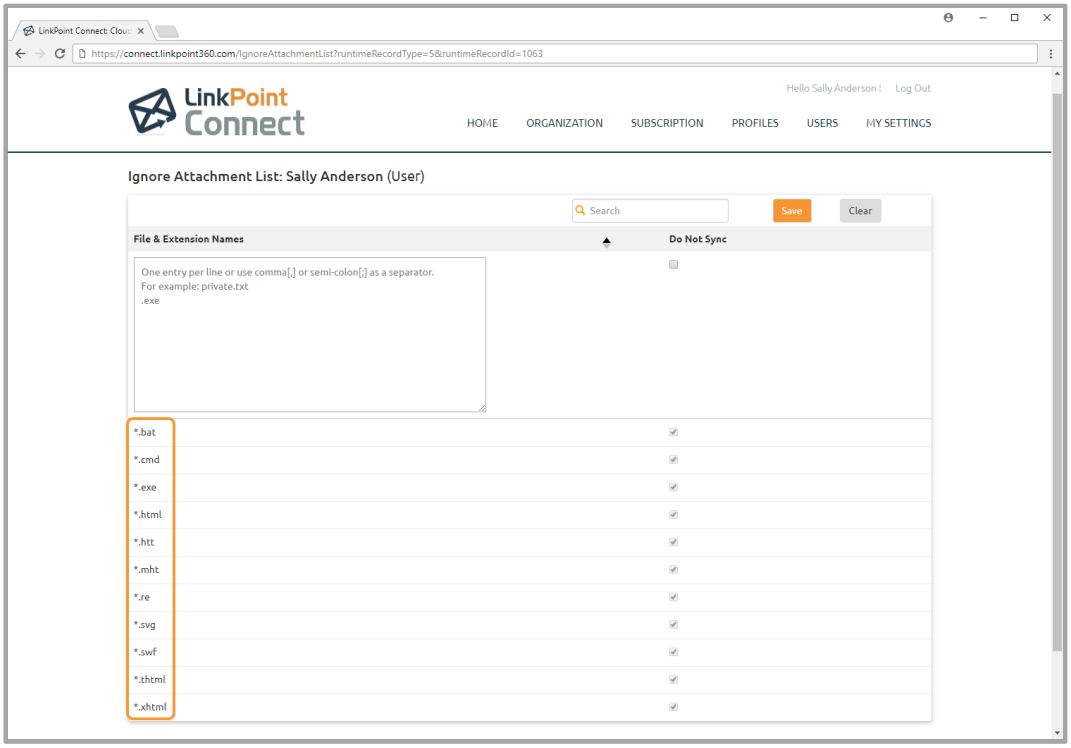
1 Log in to Cloud Edition and select **My Settings** in the top right corner of the screen.



2 Locate the **Sync Jobs** section and click the **Ignore Files** button.

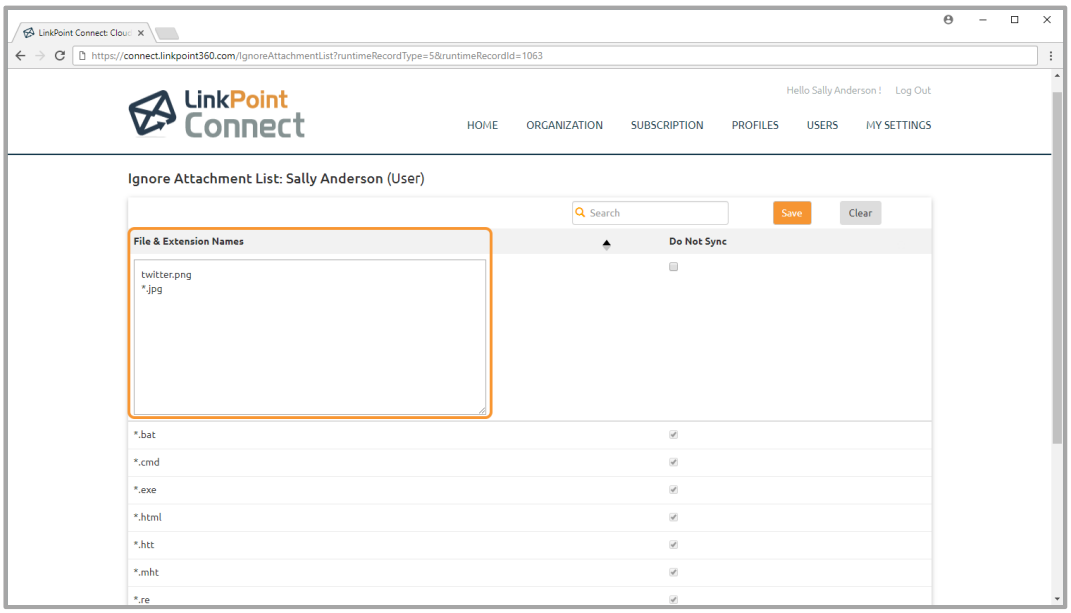


3 Note that the Ignore Attachment List is preconfigured with a default list of excluded file extensions. Attachments with these file types will not record to Salesforce if they are attached to synced emails.

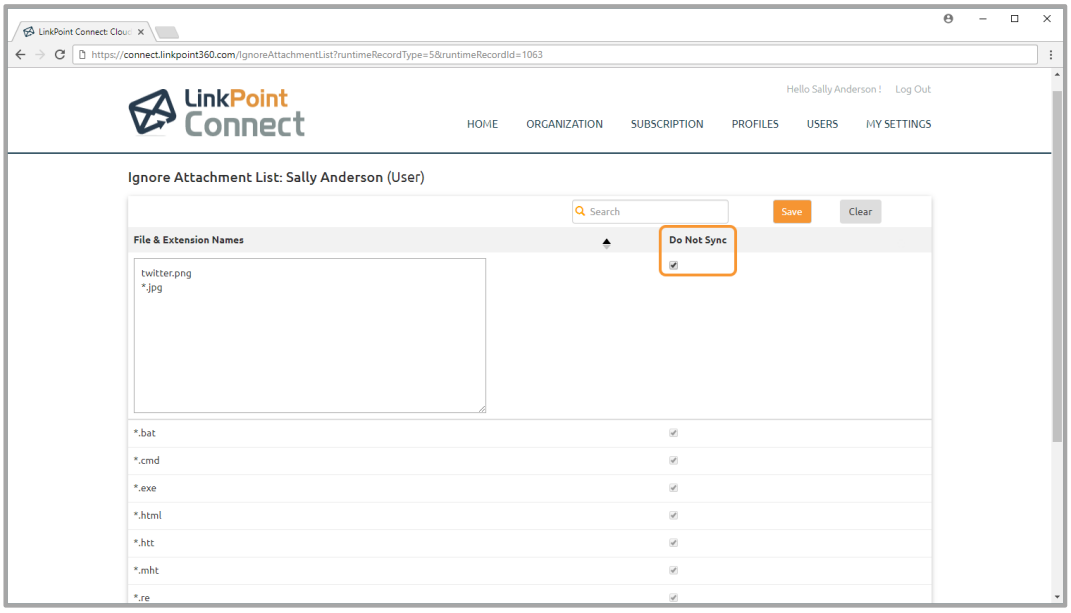


Tip: The default file extensions are configured at the Subscription level and can be added to or overwritten by an Admin. The default extensions includes: .html, .htt, .mht, .svg, .swf, .thtml, .xhtml, .exe, .bat, .cmd, .reg.

4 Enter a file name or file extension in the text entry box. You can add more than one entry with one item per line or by separating items with commas or semicolons.

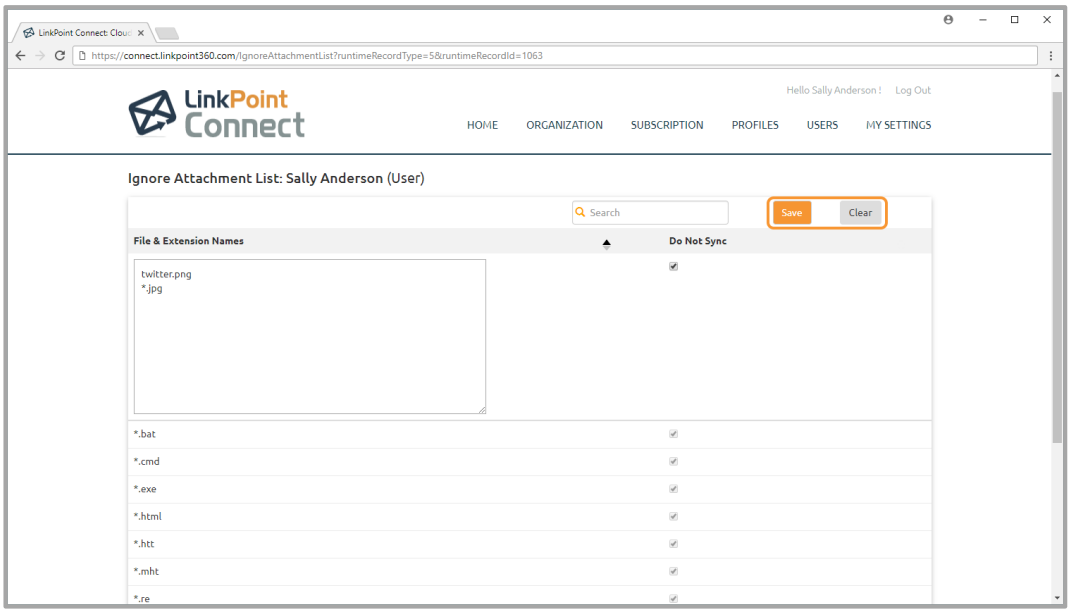


5 Select the checkbox for **Do Not Sync**.

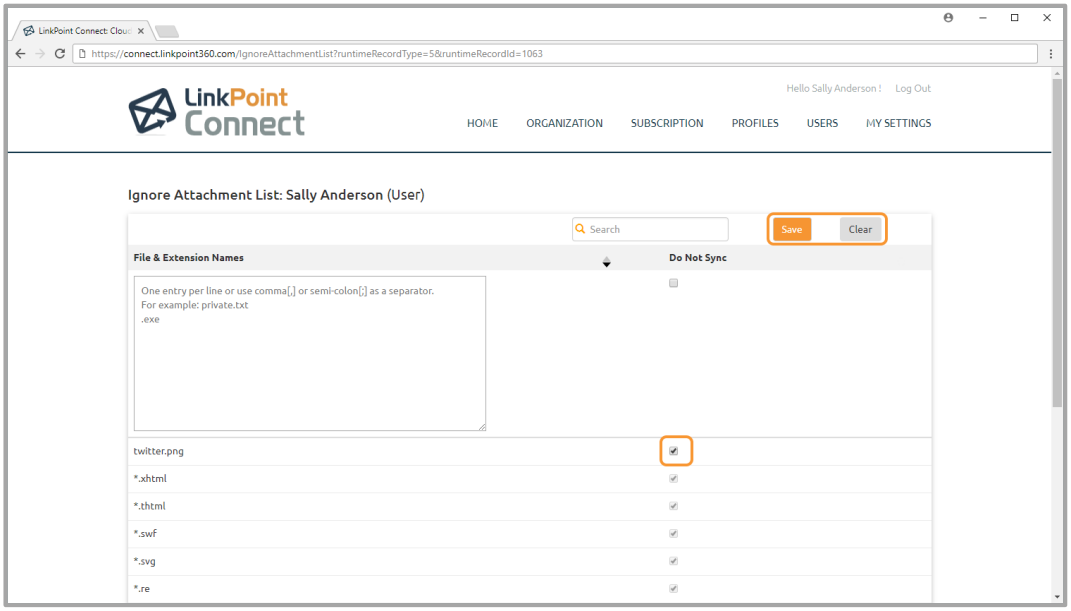


Tip: If you enter more than one file name or file extension and make an Ignore List selection, the settings will apply to all of the items submitted, as if performing a bulk create and update.

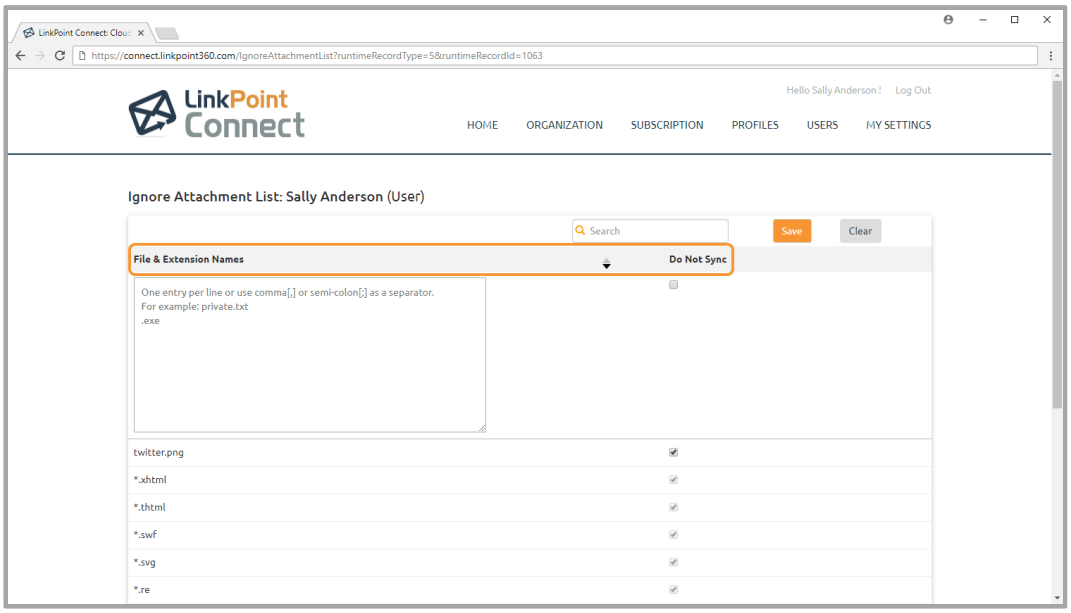
6 Click the **Clear** button to abandon your changes, or click the **Save** button to confirm the changes.



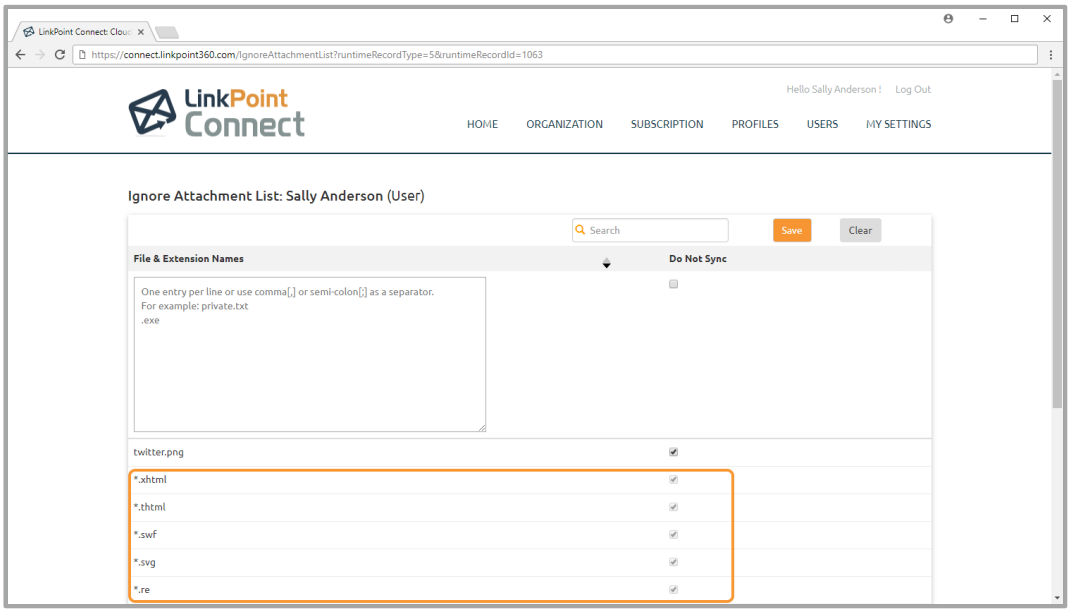
7 Deselect the **Do Not Sync** checkboxes to remove items from the Ignore Attachments List. Click the **Clear** button to abandon your changes, or click the **Save** button to confirm.



8 Sort the Ignore Attachments List by clicking the column headers to view items in ascending or descending order. Search partial or full terms to filter the list and find specific items more quickly.



Tip: Items that appear in the list with a grayed out checkbox indicate that the item was added to your Ignore Attachments List by the Admin at a higher level in the system. You are able to view that the setting has been established, but you cannot deselect the option. If the item has been set to Ignore for one sync type, you do have the ability to add it to the second sync type.



Working with Hierarchy and Permissions

Understanding Cloud Edition Hierarchy

Cloud Edition is designed to give users control over how, when, and where data is moved between Microsoft Exchange and Salesforce. While end users have their own set of configuration rules, Admins can override these settings, set defaults, and lock down specific parameters as needed. These settings are controlled through a hierarchy of permissions. On each level of the hierarchy, changes or restrictions can be set to further clarify what certain groups of users or individuals have access to. Admins will see additional navigation within the site upon logging in. Admins can use these navigation options to manage Organizations, Subscriptions, Profiles, and Users. From these pages, Admins can navigate to specific items to establish configuration settings.

The four levels of hierarchy available to Admins are Organization, Subscription, Profile, and User. Settings assigned to higher levels trickle down and affect the lower levels of the hierarchy.

Hierarchy	Definition
Organization	Account based settings and information, typically reflecting the company that purchased the Cloud Edition license.
Subscription	Groupings of license purchases. Most Organizations have a single Subscription. Multiple Subscriptions are useful for customers that need to manage licenses for users with different integrations or billing requirements.
Profile	Sets of individual users with similar sync requirements or workflow needs. These often reflect how a company organizes their users within Salesforce.
User	Individuals configured to sync data between systems.

Setting Default Values for Hosts and Sync Jobs

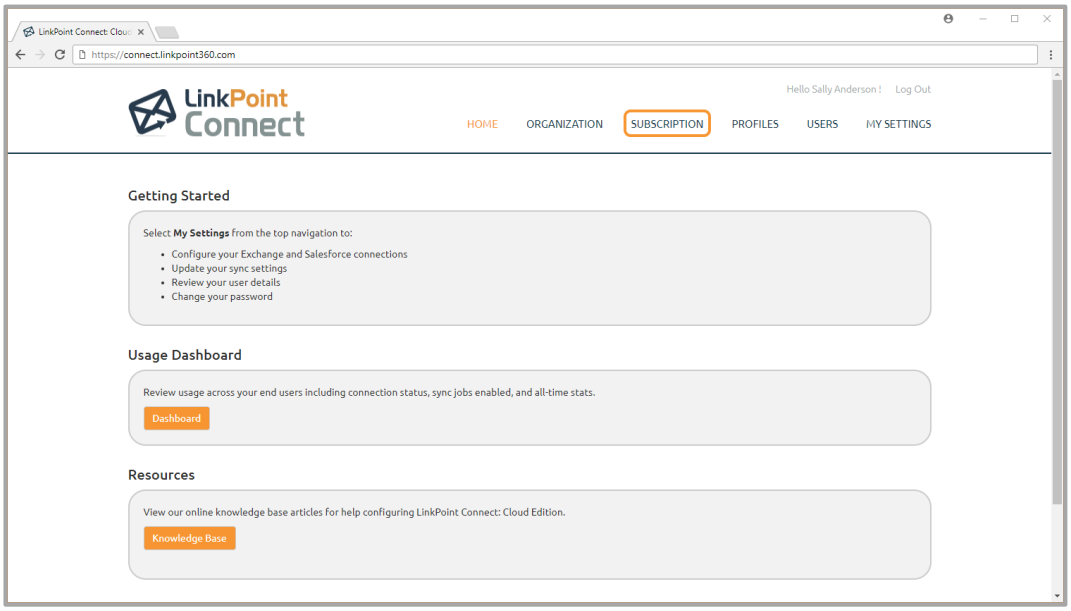
Admins can establish default settings for users at different levels of the hierarchy. The available options for Host and Sync Job settings are similar for each hierarchy and vary depending on which level or group of users are affected. Default values appear to each end user and can be overwritten by the end user if the Admin does not lock down the fields. Establishing different default values for different Subscriptions, Profiles, or Users gives Admins the flexibility to mirror existing workflows or processes for divisions or teams within their company. Default values can be set for the following:

Hierarchy	Host	Sync Jobs
Organization	✗	✓
Subscriptions	✓	✓
Profiles	✓	✓
Users	Inherit hierarchy defaults	

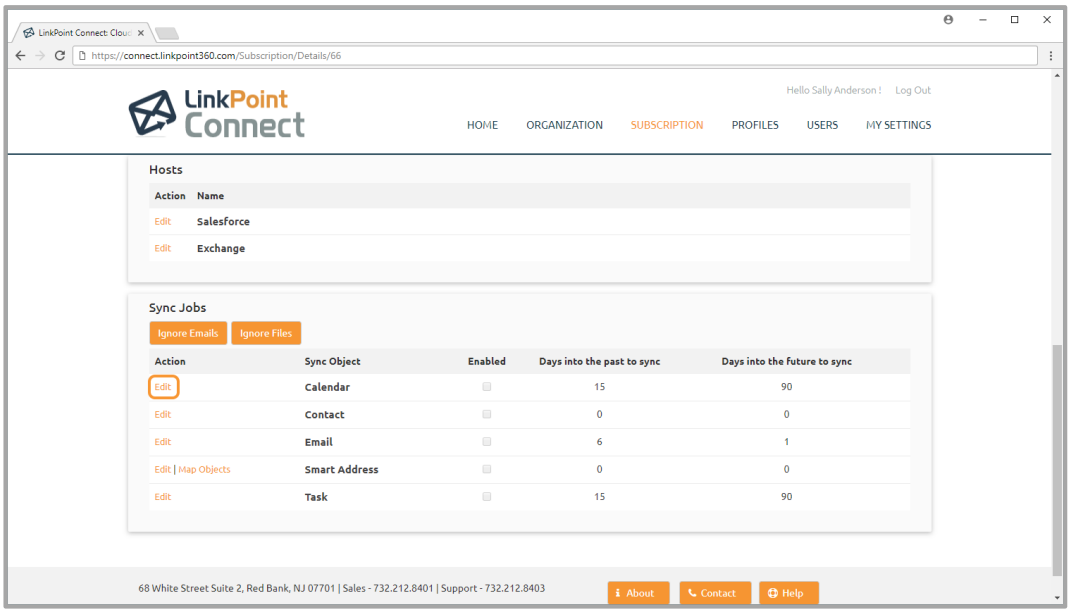
In this section, you will learn how to set default values for Hosts and Sync Jobs.

Example: In this example, we will demonstrate how to set default values for a *Calendar Sync Job* using a specific *Subscription*. The steps are the same when working with any Sync Job or Host for Organizations, Profiles, or Users. Note that the Organization level does not include settings for Host values.

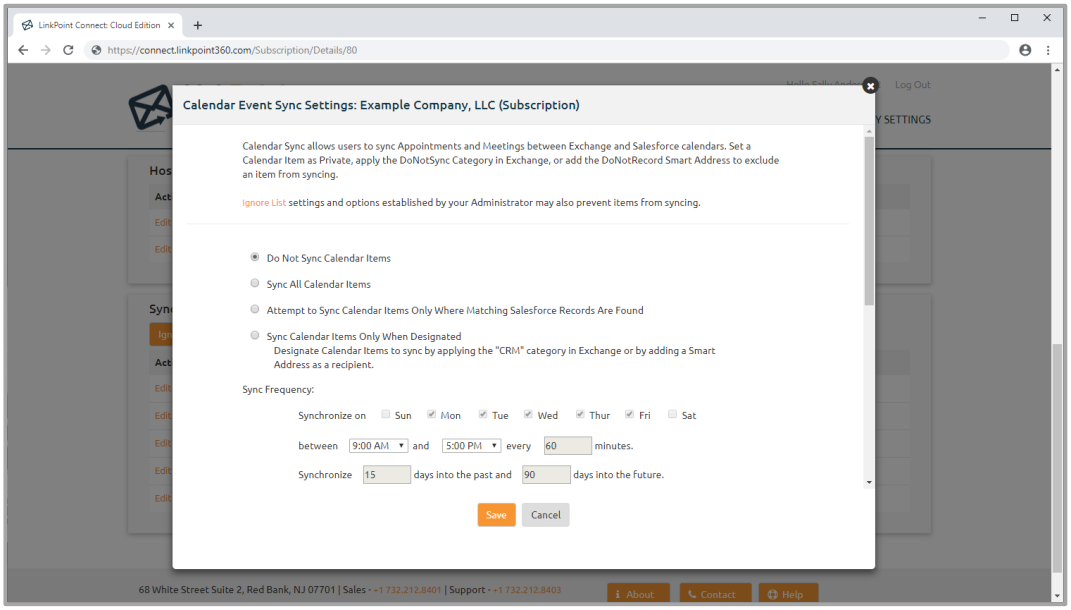
1 Log into Cloud Edition and select **Subscription** from the top navigation.



2 Select the **Edit** link in the **Action** column for the Calendar Sync Object to launch the Calendar Event Sync Settings window.



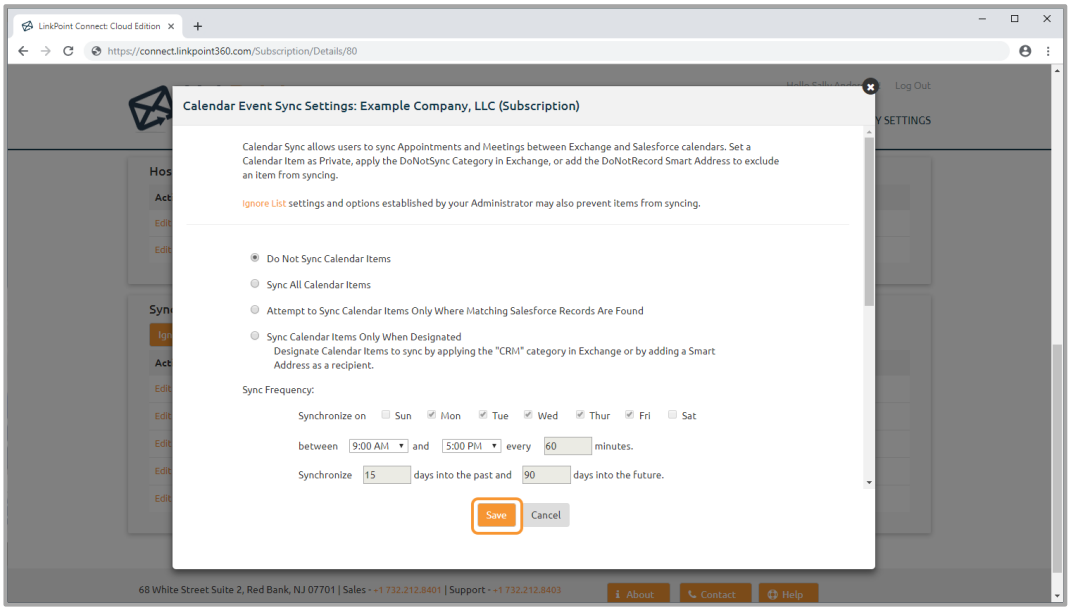
3 Select the settings you wish to apply to all Profiles and Users who are part of the current Subscription. The changes made on this screen will be applied throughout the hierarchy. If this is your first time configuring Cloud Edition, some default values may already be established. These can be changed as needed.



Warning: Selecting a sync mode for a Sync Job will activate that Sync Job and set it on by default for all users that fall under that Subscription within the hierarchy. For example, selecting *Sync All Calendar Items* will turn on calendar sync by default for all end users within that Subscription and all of its Profiles. Once these users enter their Salesforce and Exchange credentials, their Calendar Sync will automatically process.

Additional Resources: Learn more about Sync Job options in the corresponding sections of this User Guide.

4 Click the **Save** button to confirm the default settings for the Subscription and close the window.



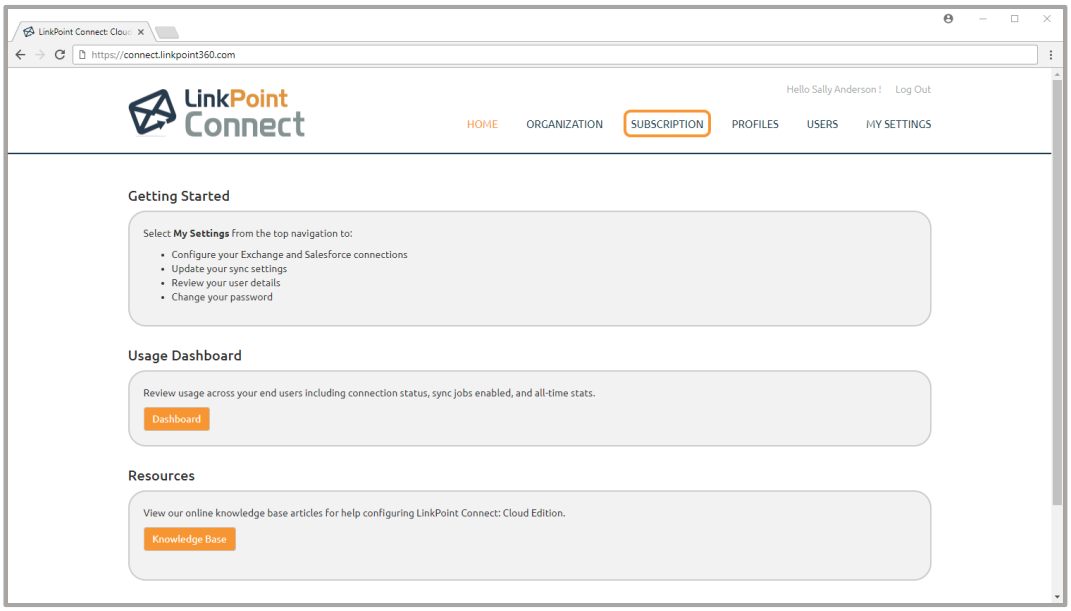
Locking Sync Job Settings

Admins have the ability to lock specific default settings for Users at different levels of the hierarchy. Locking a Host or Sync Job setting will prevent all affected users from overwriting the configuration. Establishing different lock down settings for different Subscriptions, Profiles, or Users gives Admins the flexibility to mirror existing workflows or processes for divisions or teams within their company. All settings for both Host and Sync Job configuration can be locked down by an Admin. Settings applied to an Organization, Subscription, or Profile affect all users that fall under them in the hierarchy. In this section, you will learn how to lock down configuration settings for Hosts and Sync Jobs.

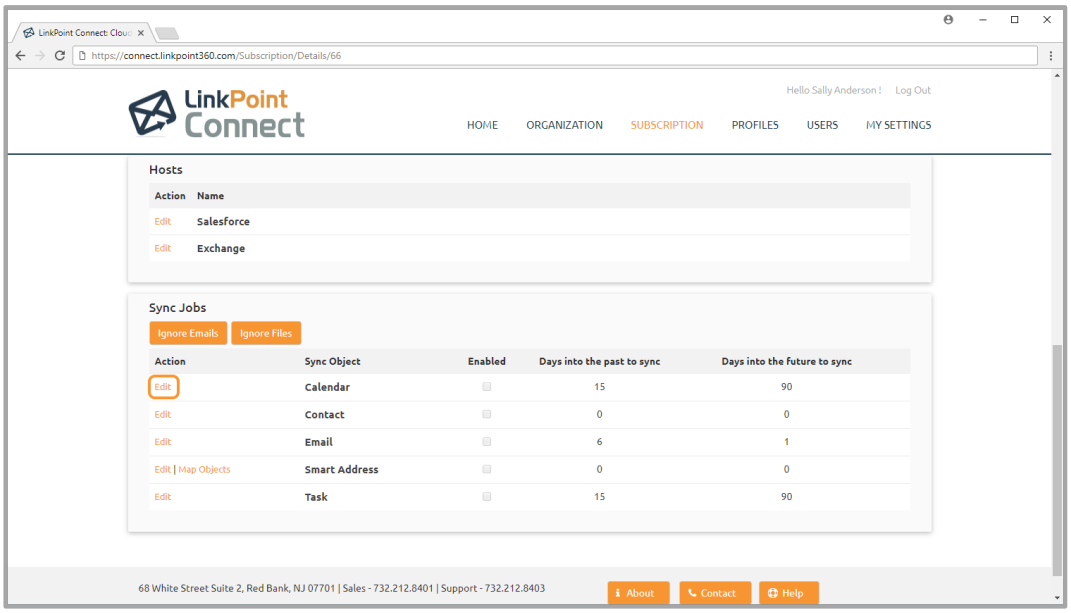
Warning: Admins have the ability to set default sync settings and/or lock down these settings to prevent end user override. Settings that are preset and locked by an Admin are visible to end users but are grayed out and cannot be edited.

Example: In this example, we will demonstrate how to lock down configuration settings for a *Calendar Sync Job* using a specific *Subscription*. The steps are the same when working with any Sync Job or Host for Organizations, Profiles, or Users. Note that the Organization level does not include settings for Host values.

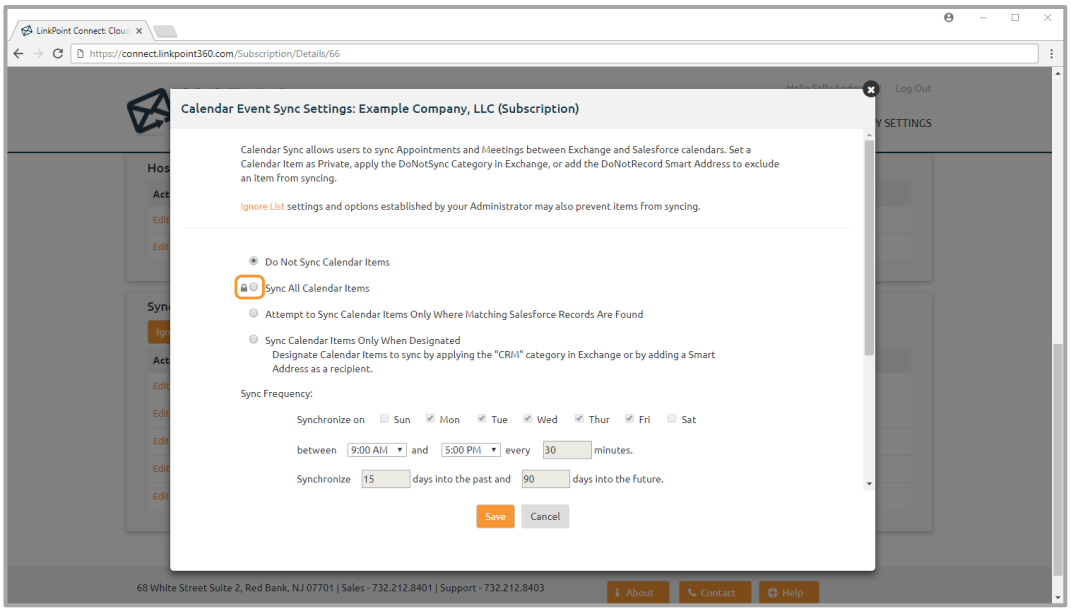
1 Log into Cloud Edition and select **Subscription** from the top navigation.



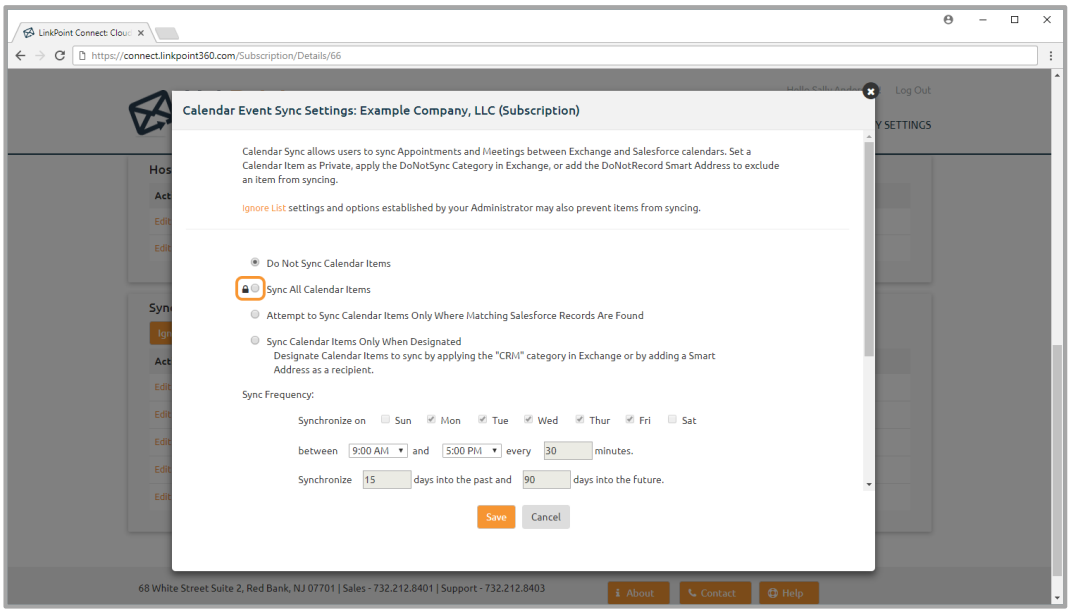
2 Select the **Edit** link in the **Action** column for the Calendar Sync Object to launch the Calendar Event Sync Settings window.



3 Mouse over the space to the left of each configuration setting to reveal a grey **Lock** icon. Note that if a setting is already locked down, a black **Lock** icon will be displayed to the left of the setting.



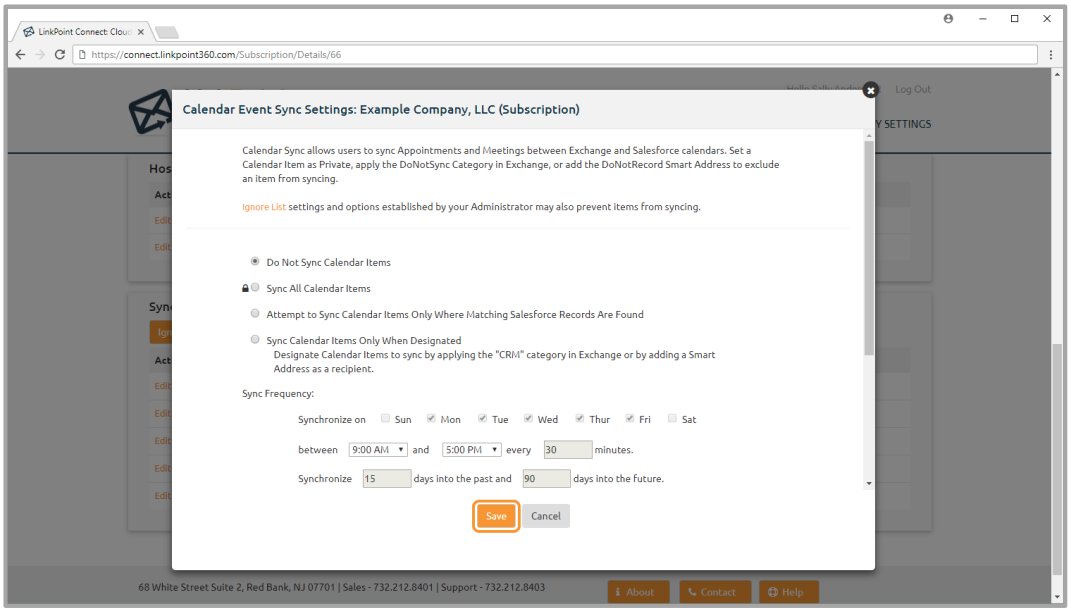
4 Click the grey **Lock** icon for a configuration setting to lock the setting as configured. Click the black **Lock** icon to unlock a setting.



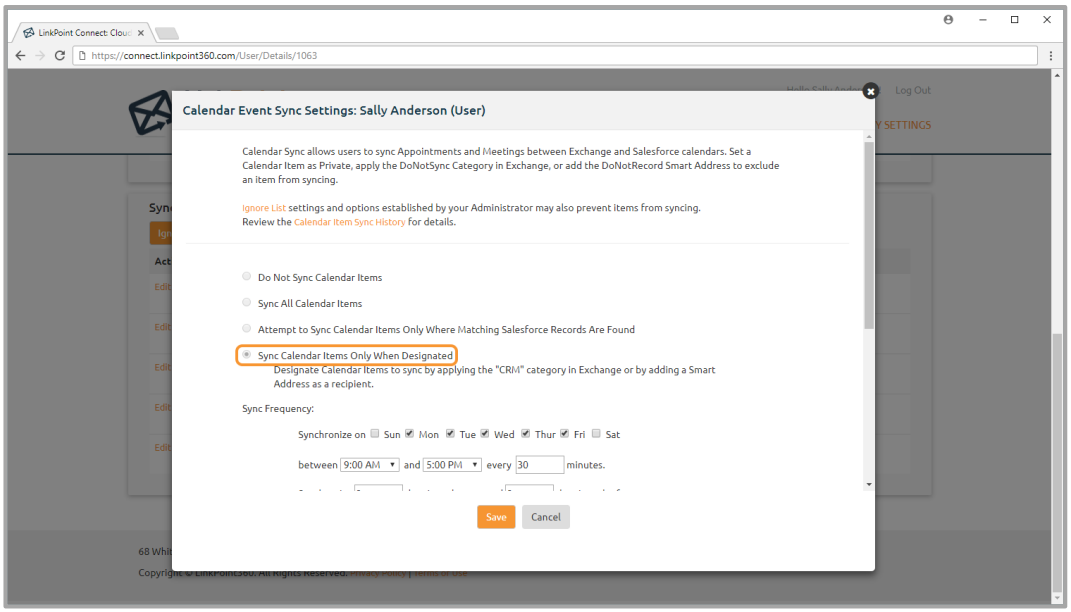
Warning: Selecting a sync setting for a Sync Job and locking the setting down will activate that Sync Job, set it on by default for all users that fall under that Subscription within the hierarchy, and prevent those end users from disabling or changing the sync setting. For example:

- Selecting the option *Sync All Calendar Items* and then selecting the **Lock** icon will **turn on** calendar sync by default for all end users within that Subscription or Profile, and individual users will have no way to disable (or turn off) the syncing.
- Selecting the option *Do Not Sync Calendar Items* and then selecting the **Lock** icon will **disable and hide** the calendar sync by default for all end users within that Subscription or Profile. Individual users will not see the option to use Calendar Sync and will have no way to activate or use this sync feature.

5 Click the **Save** button to confirm the default settings for the Subscription and close the window.



Tip: Settings locked by an Admin are visible to end users as grayed out options. Users will not be able to change any locked settings.

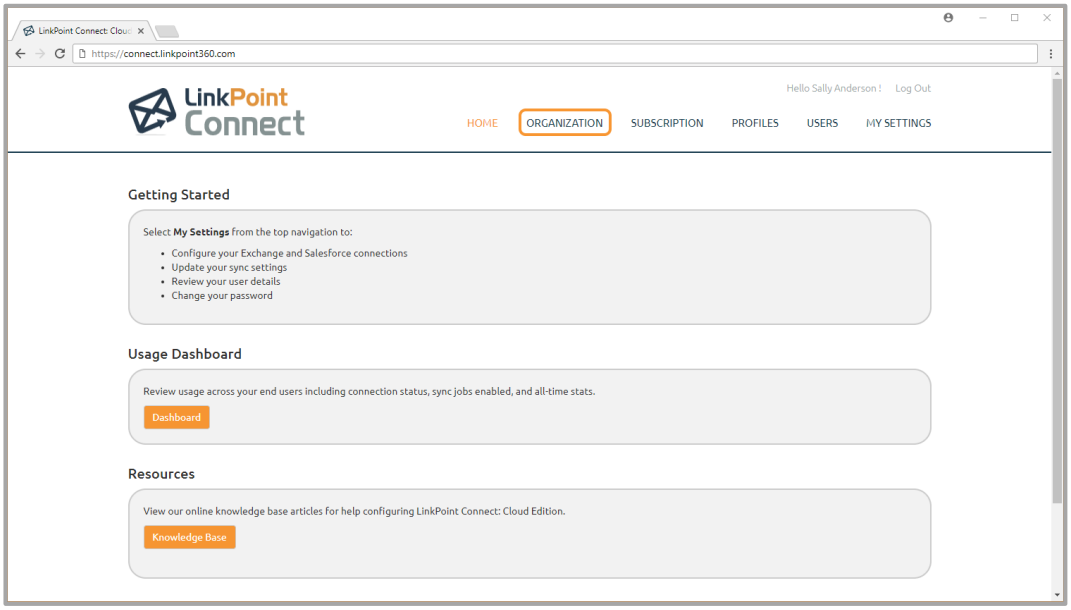


Configuring Organization Settings

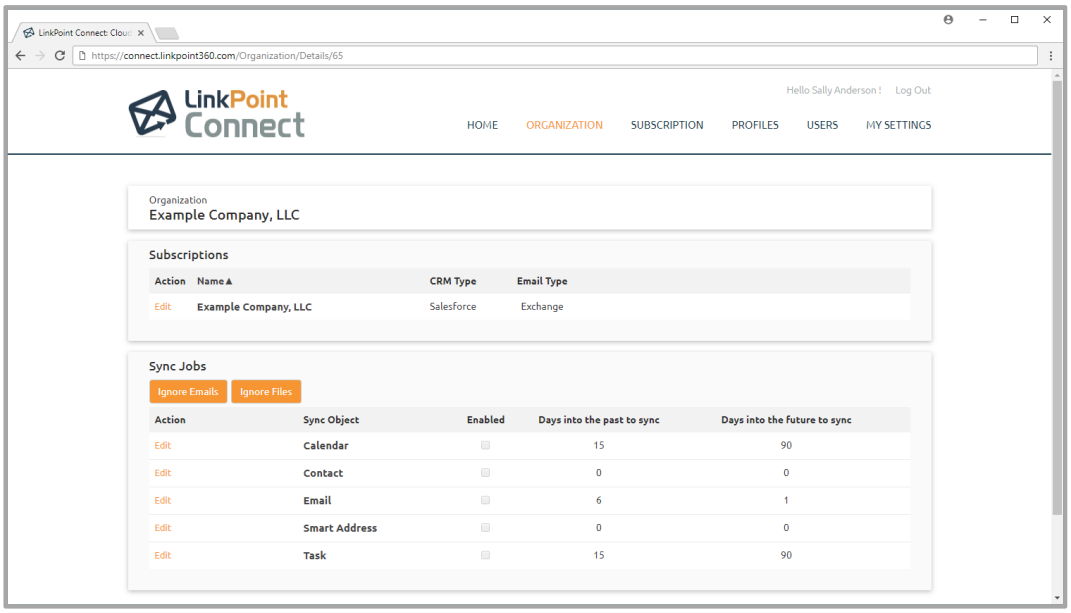
Reviewing Organization Options

An Organization is the top level of the Cloud Edition hierarchy. Admins will always have access to a single Organization for their instance of Cloud Edition. In this section, you will become familiar with the available options on the Organization level.

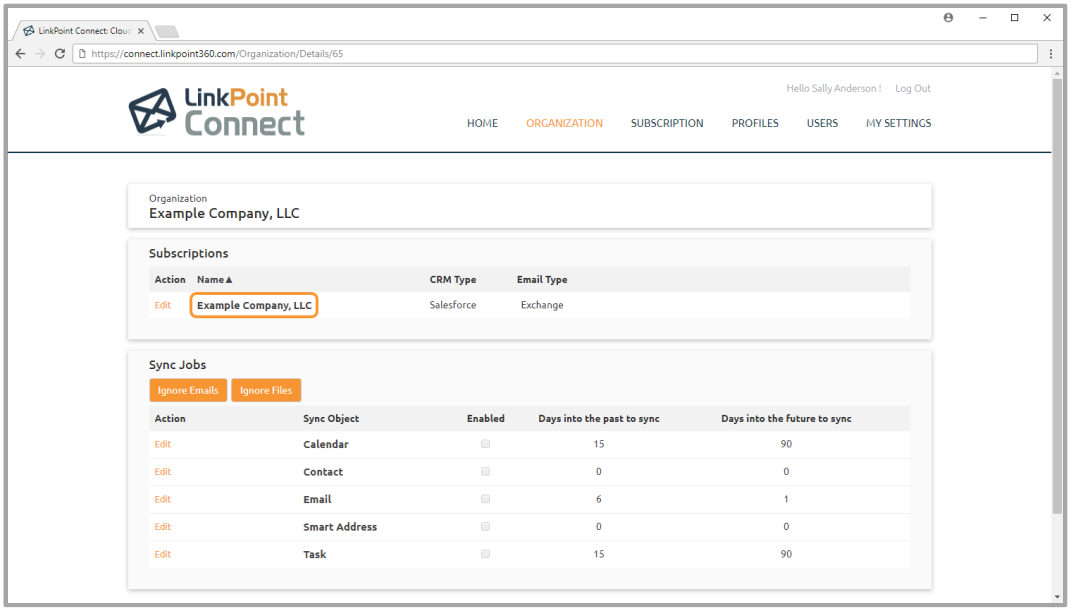
1 Log into Cloud Edition and select **Organization** from the top navigation.



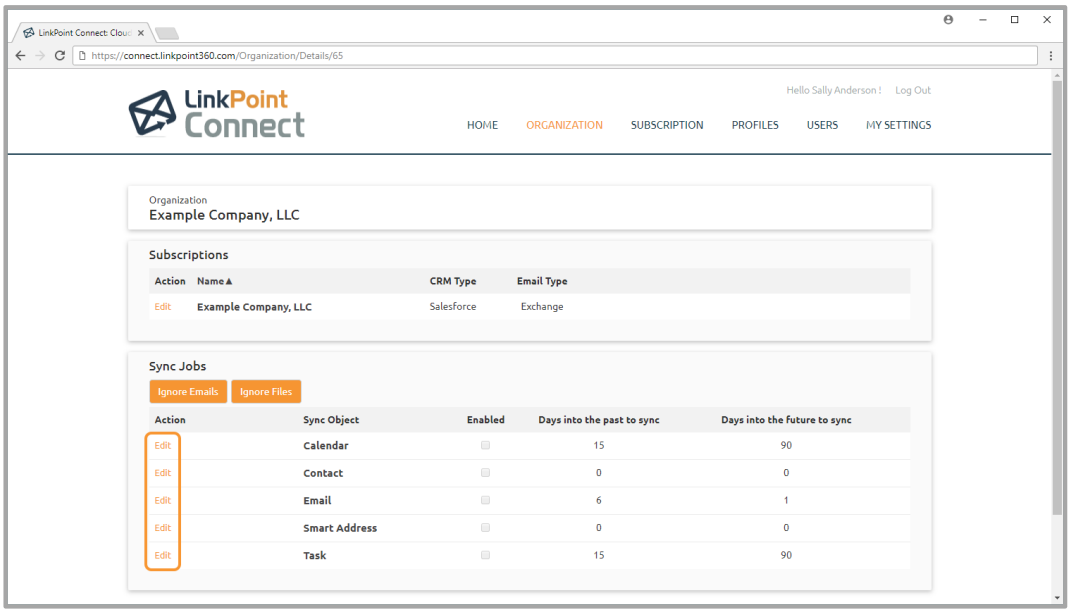
2 Review the available **Subscriptions** for the Organization. Note that most organizations will have only one Subscription listed.



Tip: To view details for the Subscription, click the **Subscription Name** and advance to the specific Subscription.



3 Review the list of available **Sync Jobs**. Select the **Edit** link for a Sync Job to predefine and lock down specific settings for each Sync Job.



Tip: The options for locking and predefining Sync Job rules are more limited at the Organization level than at the Subscription and Profile levels. Many Sync Job settings rely on Host data to determine how information will move between Salesforce and Exchange. However, the Organization level does not contain Host information.

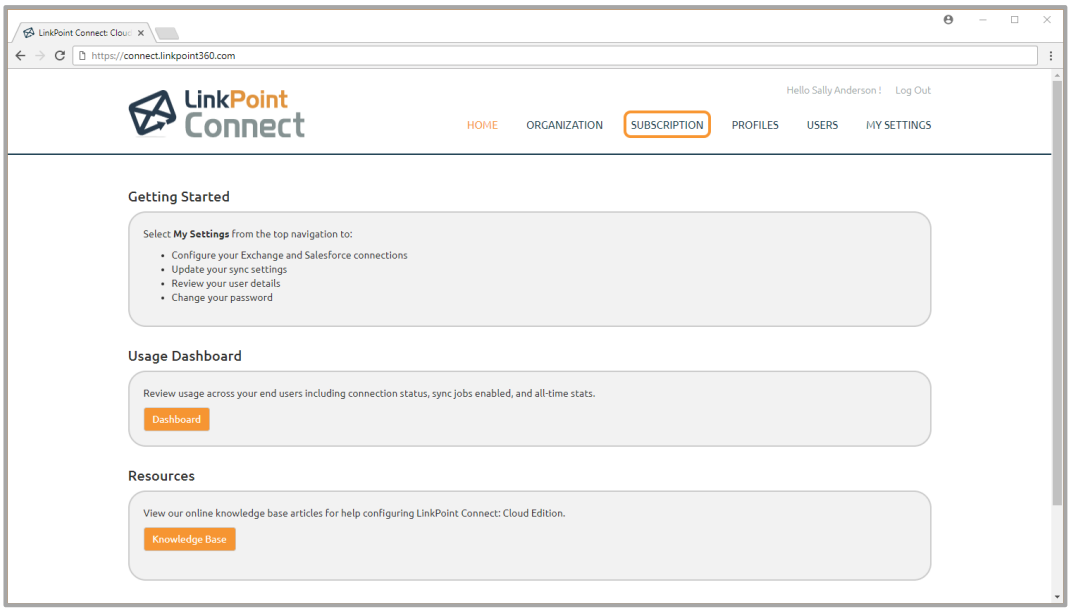
Additional Resources: Learn more about predefining and locking Sync Job settings in the **Locking Sync Job Settings** section of this User Guide.

Configuring Subscriptions

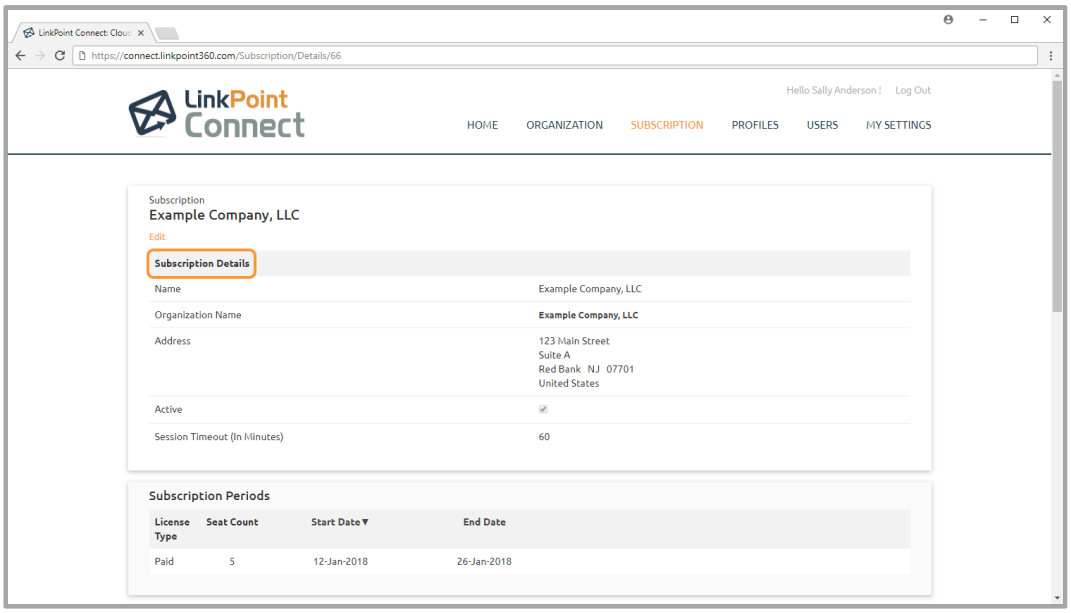
Reviewing Subscription Options

A Subscription is the second level of a Cloud Edition hierarchy, falling under an Organization. Subscriptions are groupings of licenses purchased by a LinkPoint360 customer. An Admin can choose to group all licenses under one subscription or request separate Subscriptions from LinkPoint360 in order to separate billing across divisions or teams within a company. Subscriptions are also used to manage licenses for users with different integrations. All users within a Subscription must have the same email and CRM configuration. Subscriptions inherit any default or locked settings established on the Organization level. Any settings configured for a Subscription will impact the Profiles and Users within the Subscription. In this section, you will become familiar with the available options on the Subscription level.

1. Log into Cloud Edition and select **Subscription** from the top navigation.

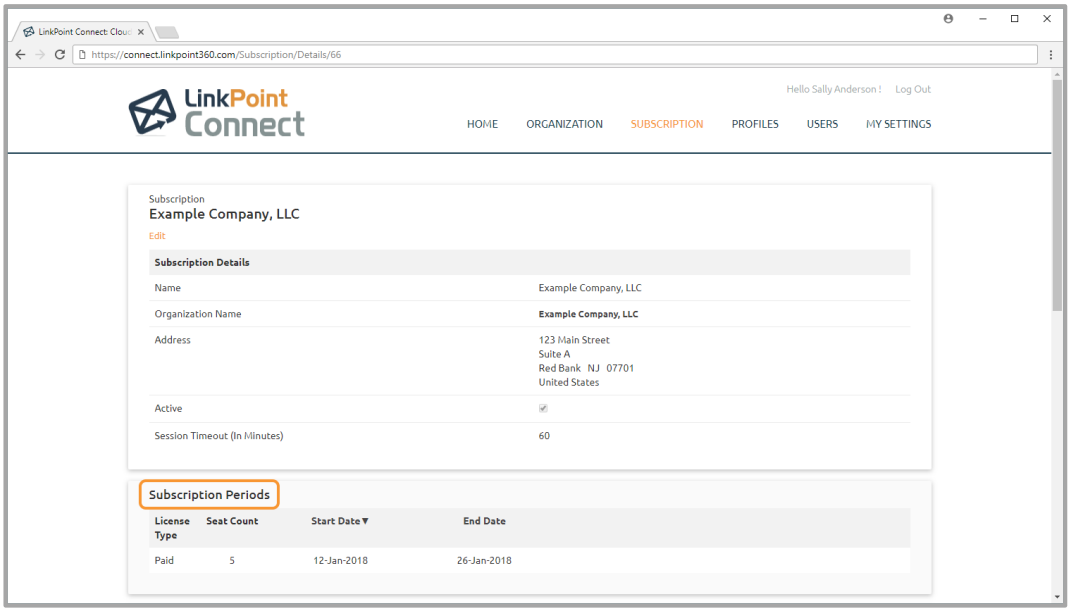


2 Review the **Subscription Details**. The information presented is for reference and generally used for billing.



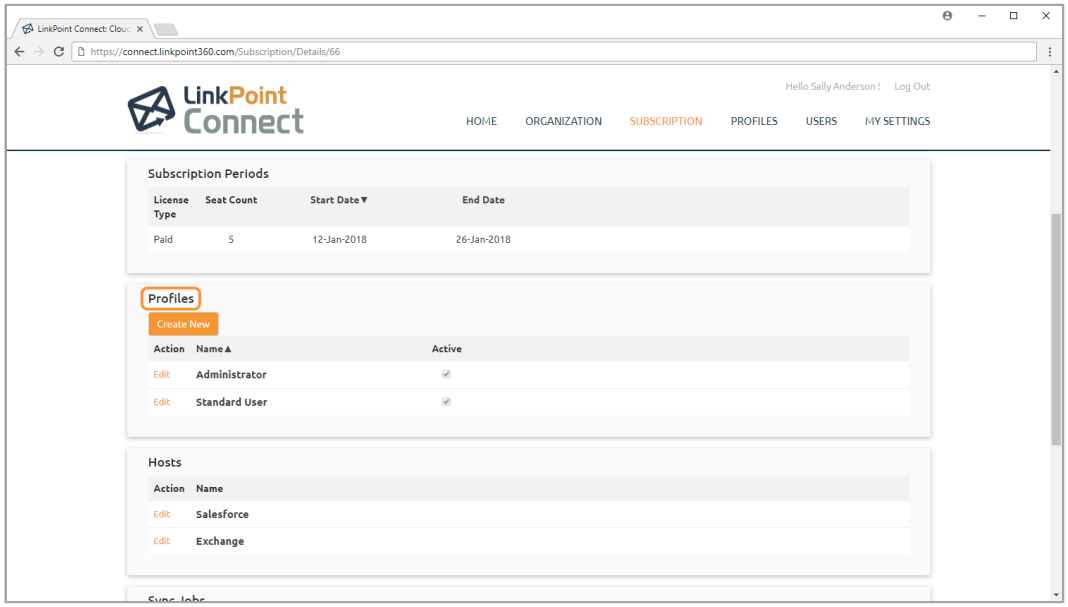
Additional Resources: Learn more about changing Subscription information in the **Editing Subscription Details** section of this User Guide.

3 Review the **Subscription Periods** to see the **License Type** currently in use for the Subscription as well as the **Seat Count**, **Start Date**, and **End Date** for the license.



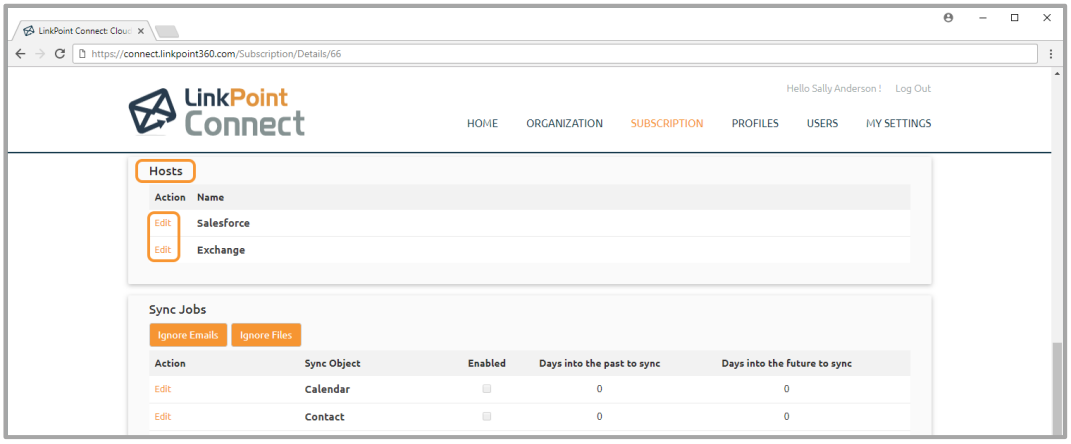
Tip: Users that have previously trialed Cloud Edition may see an *Evaluation* license listed as expired alongside a current paid license. The Subscription Period will also reflect whether your account falls out of good standing due to a missed renewal payment or cancellation. Contact your Account Executive with any questions regarding your current Subscription status.

4 Review the list of available **Profiles** for the Organization. By default, a new Subscription will have two Profiles: *Administrator* and *Standard User*.



Additional Resources: Learn more about adding Profiles in the **Creating a New Profile** section of this User Guide.

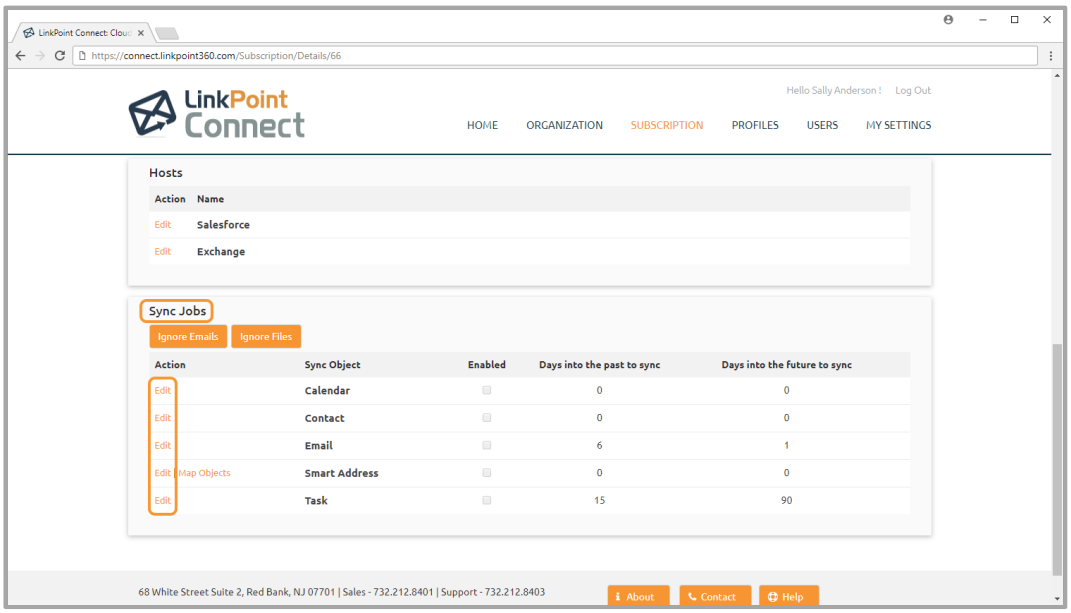
5 Review the list of available **Hosts**. Select the **Edit** link for a Host to predefine and lock down specific settings for each Sync Job.



Tip: The options for locking and predefining Hosts are more limited at the Subscription level than at the User level. Many Host settings rely on end user credentials to determine how information will move between Salesforce and Exchange.

Additional Resources: Learn more about the available Host settings in the **Connecting Hosts** sections of this User Guide.

6 Review the list of available **Sync Jobs**. Select the **Edit** link for a Sync Job to predefine and lock down specific settings for each Sync Job.



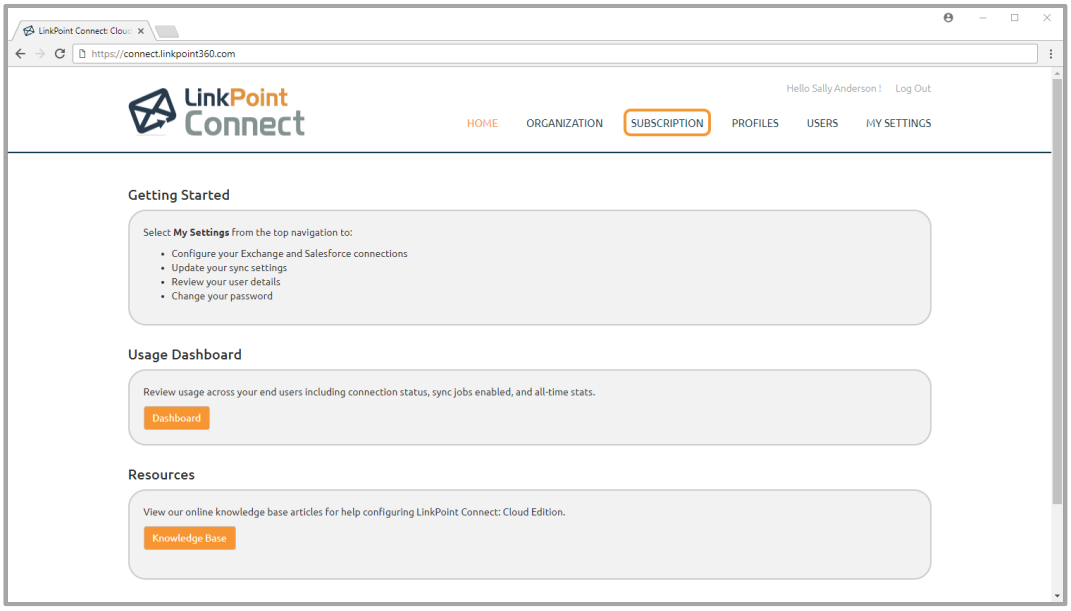
Tip: The options for locking and predefining Sync Job rules are more limited at the Subscription level than at the User level. Many Sync Job Settings rely on end user credentials to determine how information will move between Salesforce and Exchange.

Additional Resources: Learn more about predefining and locking Sync Job settings in the **Locking Sync Job Settings** section of the User Guide.

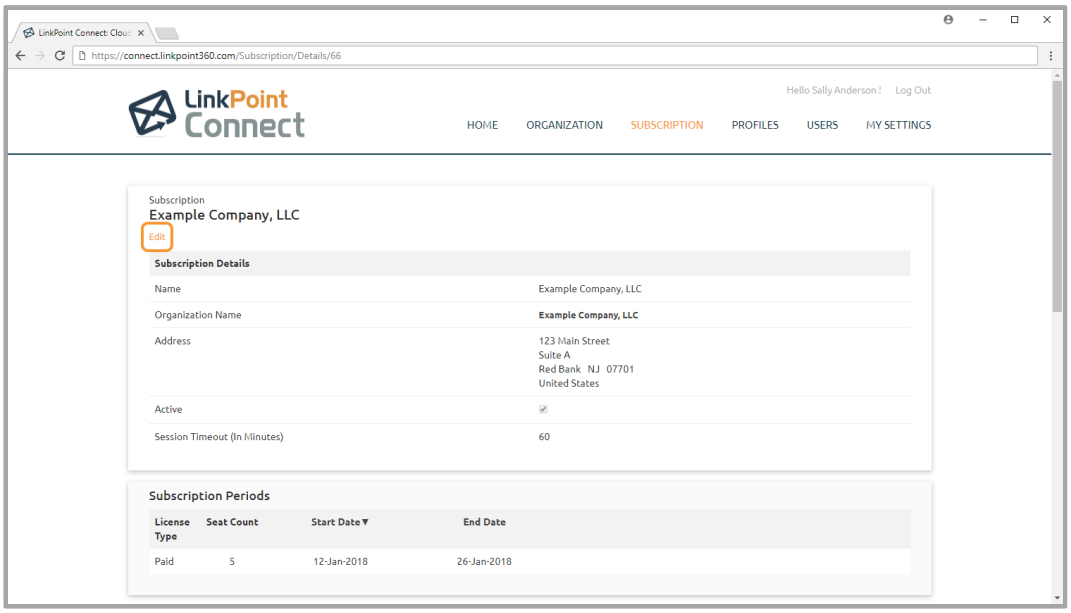
Editing a Subscription

A Subscription is the second level of a Cloud Edition hierarchy, falling under an Organization. Subscriptions are groupings of licenses purchased by a LinkPoint360 customer. An Admin can choose to group all licenses under one subscription or request separate Subscriptions from LinkPoint360 in order to separate billing across divisions or teams within a company. Subscriptions are also used to manage licenses for users with different integrations. All users within a Subscription must have the same email and CRM configuration. Subscriptions inherit any default or locked settings established on the Organization level. Any settings configured for a Subscription will impact the Profiles and Users within the Subscription. In this section, you will learn how to edit a Subscription.

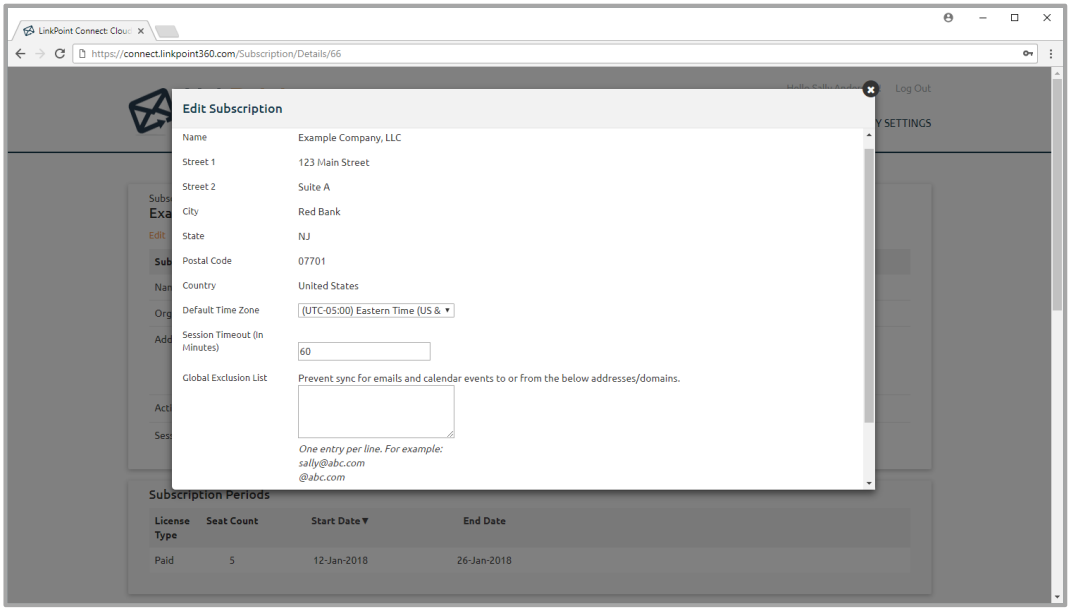
1 Log into Cloud Edition and select **Subscription** from the top navigation.



2 Select the **Edit** link under the Subscription name.



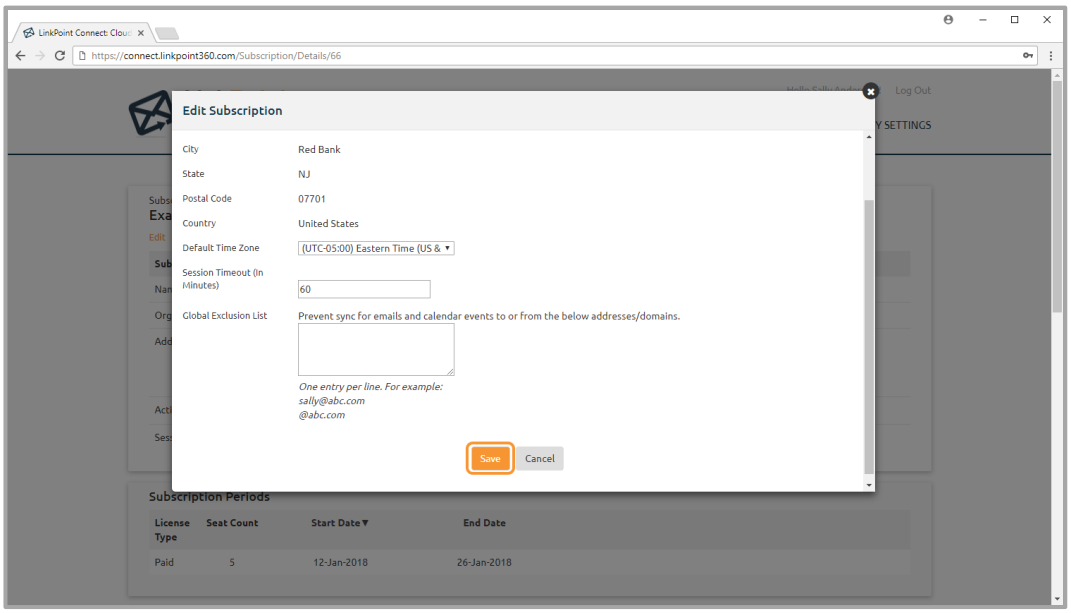
3 Review the available fields and make edits as needed. Note that the changes made here will apply as defaults for all users in the Subscription.



Warning: Making changes to the Global Exclusion List will affect all Profiles and Users for the Subscription and will influence sync behavior. Be sure to review the **Configuring the Global Exclusion List** section of this User Guide before proceeding.

Tip: Some options may not be available for editing. If you need to make changes to your Subscription and do not have access to a specific field, please contact your Account Executive.

4 Click **Save** to confirm the changes and then close the **Edit Subscription** window.

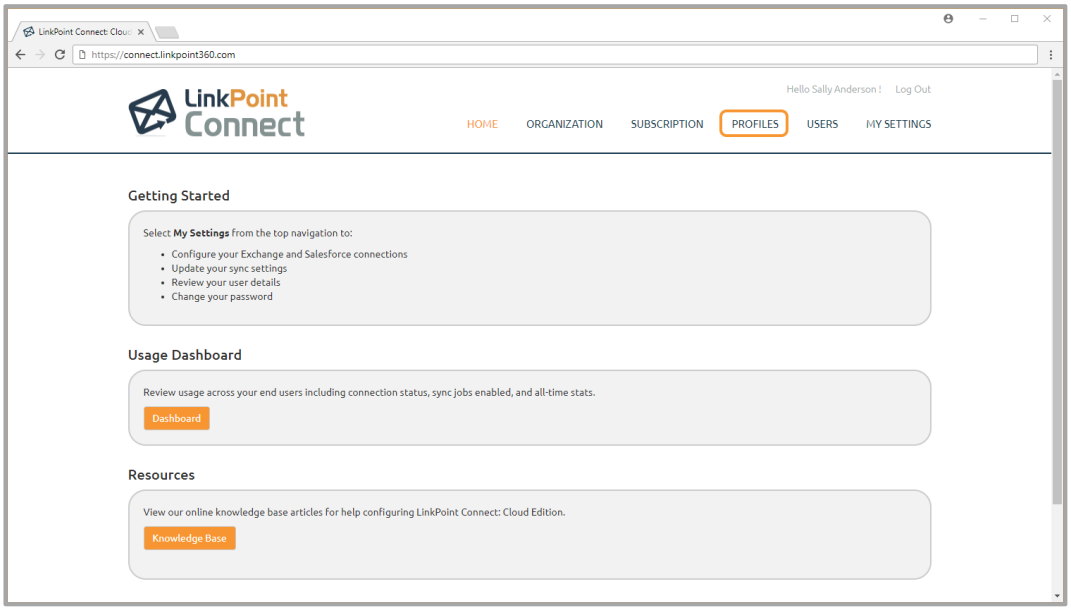


Configuring Profiles

Reviewing Profile Options

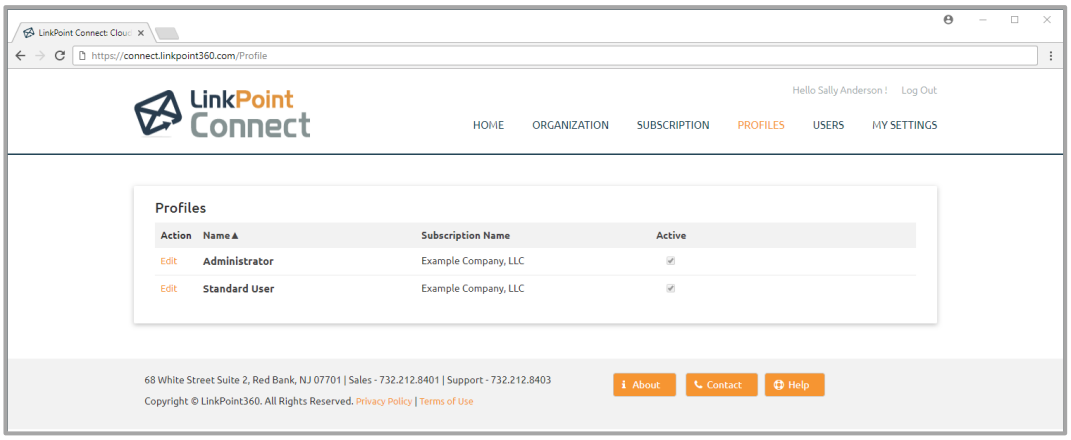
A Profile is the third level of a Cloud Edition hierarchy, falling under a Subscription. Profiles are groupings of Users who have access to Cloud Edition. An Admin can choose to group all Users under the existing default Profiles (Admin and Standard User) or to create new Profiles to organize Users based specific criteria. Examples include creating Profiles for groups of employees by department (i.e. Sales, Marketing), by division or team (i.e. EMEA Team, NA Team), or by existing workflow permissions (i.e. all users who can calendar sync, all users who are not allowed to calendar sync). Profiles can also be configured to mirror profiles already established within Salesforce. Profiles inherit any default or locked settings established on the Organization and/or Subscription levels. Any settings configured for a Profile will impact the Users added to it. In this section, you will become familiar with the available options on the Profile level.

1 Log into Cloud Edition and select **Profiles** from the top navigation.



Tip: You can also access the list of available Profiles from a Subscription.

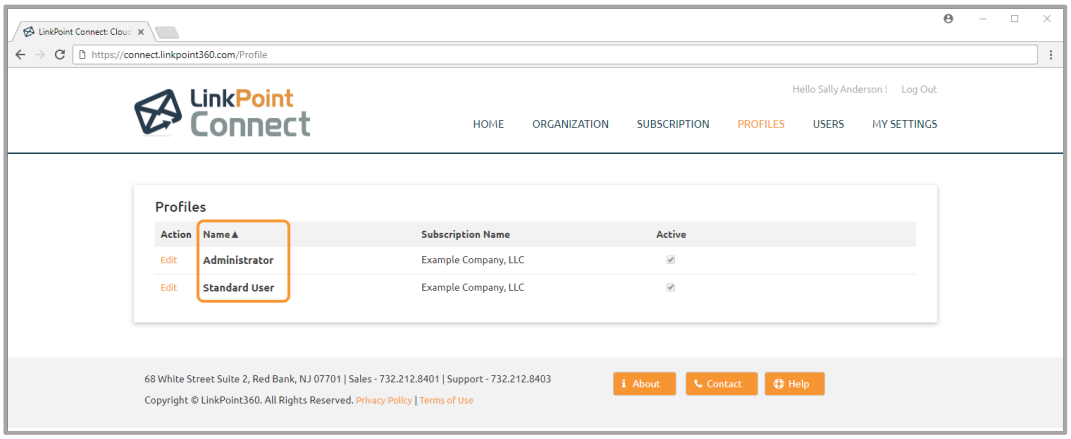
2 Review the available **Profiles**. Notes that the default Profiles include *Administrator* and *Standard User*.



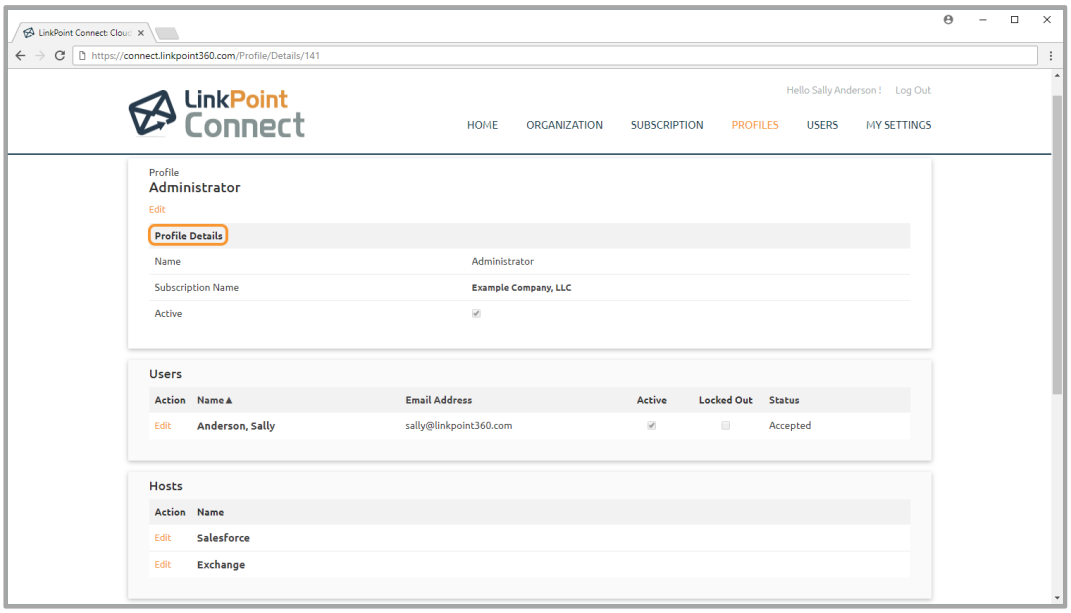
Tip: The Active column indicates which Profiles are active and which are inactive along with a listing of the Profile's Subscription for easier use and navigation. Users on Inactive Profiles are not able to run their sync.

Additional Resources: Learn more about updating Profile information in the **Editing Profile Details** section of this User Guide.

3 Select a **Profile Name** to view the full Profile.



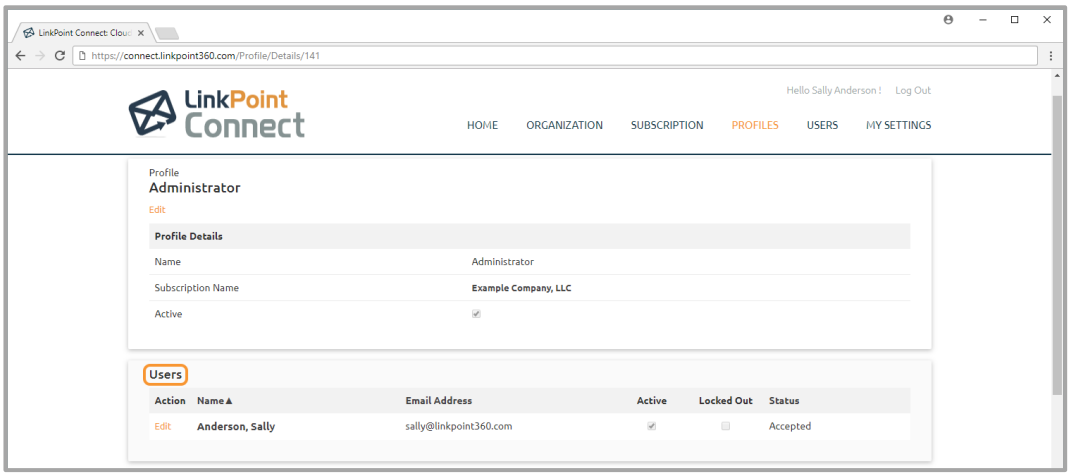
4 Review the **Profile Details**. The information presented is for reference and generally used to demonstrate where the Profile appears in the Cloud Edition hierarchy.



Additional Resources: Learn more about changing Profile information in the **Editing Profile Details** section of this User Guide.

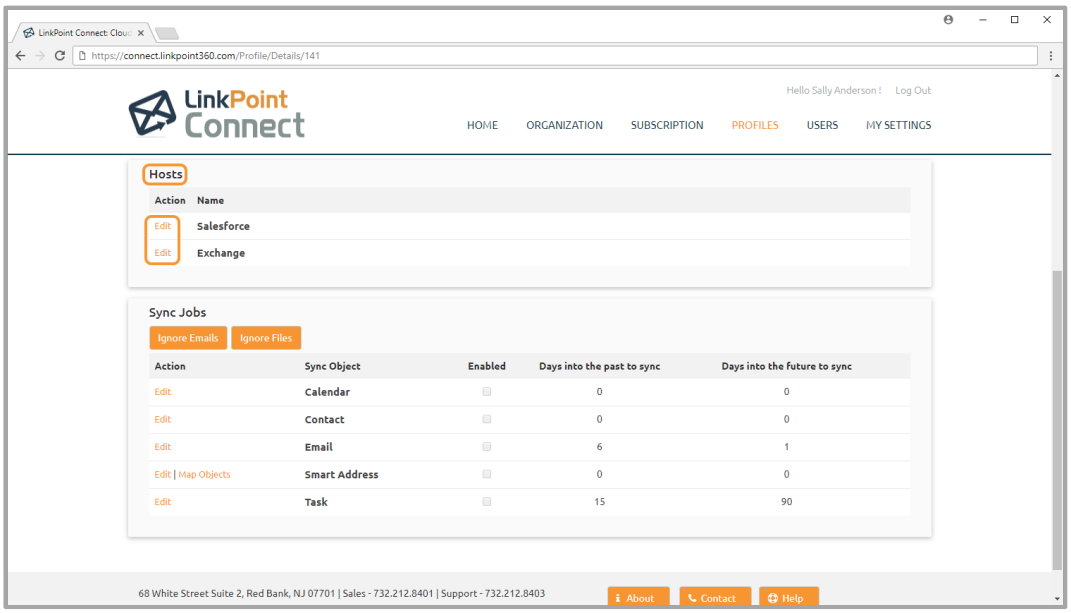
5 Review the **Users** list to see a list of each individual who has been assigned to the Profile, the User's **Email Address**, and three status indicators:

- **Active**: Indicates if the User is allotted one of the Subscription licenses.
- **Locked Out**: Indicates whether the User's access to Cloud Edition has been revoked.
- **Status**: Indicates that the User received the initial invitation to provision a Cloud Edition account and has set up a username and password. This status does not indicate whether the User has connected to Salesforce and/or Exchange.



Additional Resources: Learn more about editing user information in the **Editing User Details** section of this User Guide.

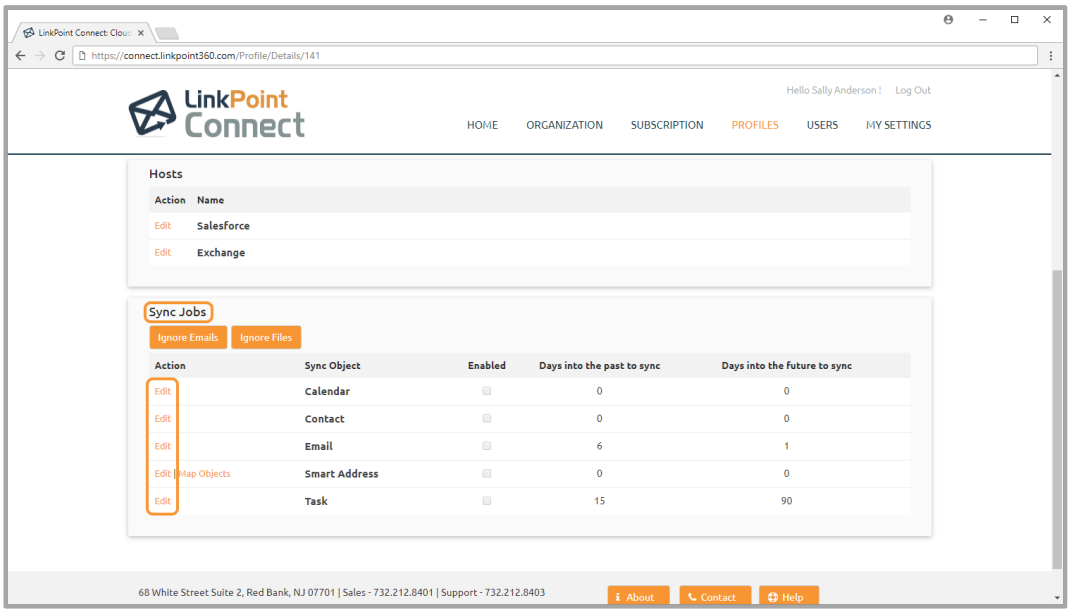
6 Review the list of available **Hosts**. Select the **Edit** link for a Host to predefine and lock down specific settings for each Sync Job.



Tip: The options for locking and predefining Hosts are more limited at the Profile level than at the User level. Many Host settings rely on end user credentials to determine how information will move between Salesforce and Exchange.

Additional Resources: Learn more about the available Host settings in the **Connecting Hosts** sections of this User Guide.

7 Review the list of available **Sync Jobs**. Select the **Edit** link for a Sync Job to predefine and lock down specific settings for each Sync Job.



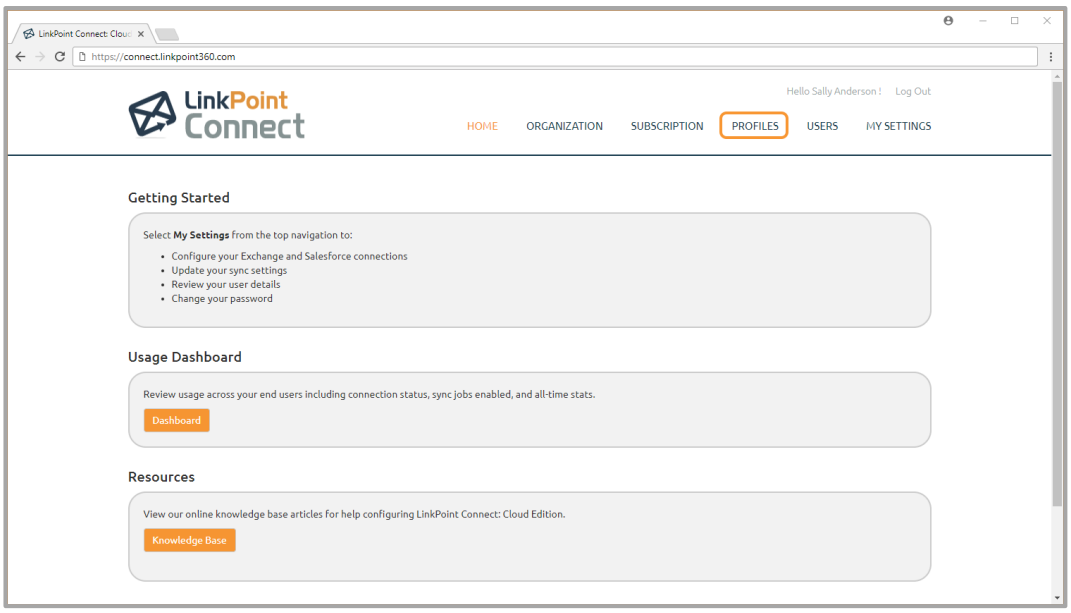
Tip: The options for locking and predefining Sync Job rules are more limited at the Profile level than at the User level. Many Sync Job Settings rely on end user credentials to determine how information will move between Salesforce and Exchange.

Additional Resources: Learn more about predefining and locking Sync Job settings in the **Locking Sync Job Settings** section of this User Guide.

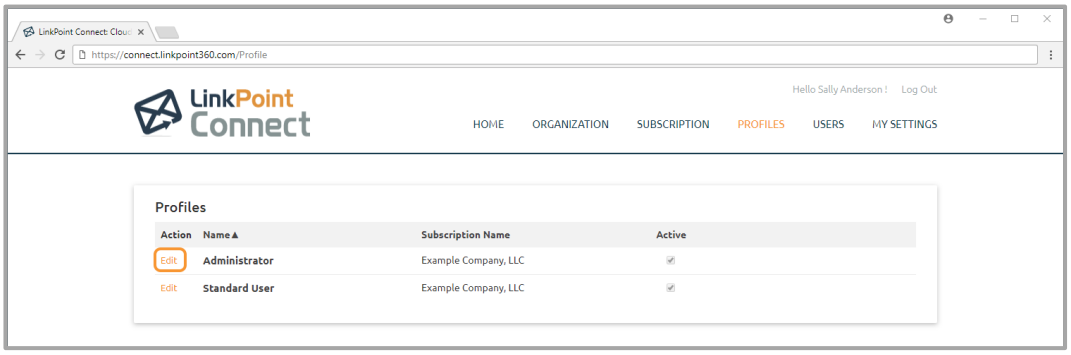
Editing a Profile

A Profile is the third level of a Cloud Edition hierarchy, falling under a Subscription. Profiles are groupings of Users who have access to Cloud Edition. An Admin can choose to group all Users under the existing default Profiles (Admin and Standard User) or to create new Profiles to organize Users based specific criteria. Examples include creating Profiles for groups of employees by department (i.e. Sales, Marketing), by division or team (i.e. EMEA Team, NA Team), or by existing workflow permissions (i.e. all users who can calendar sync, all users who are not allowed to calendar sync). Profiles can also be configured to mirror profiles already established within Salesforce. Profiles inherit any default or locked settings established on the Organization and/or Subscription levels. Any settings configured for a Profile will impact the Users added to it. In this section, you will learn how to edit an existing Profile.

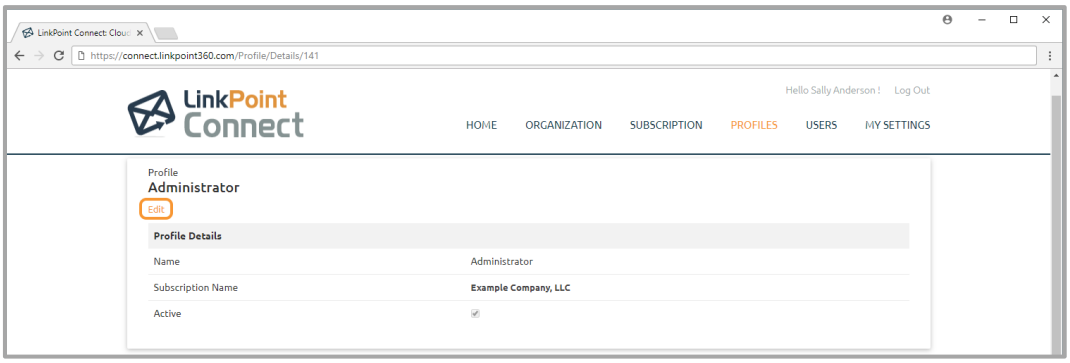
1 Log into Cloud Edition and select **Profiles** from the top navigation.



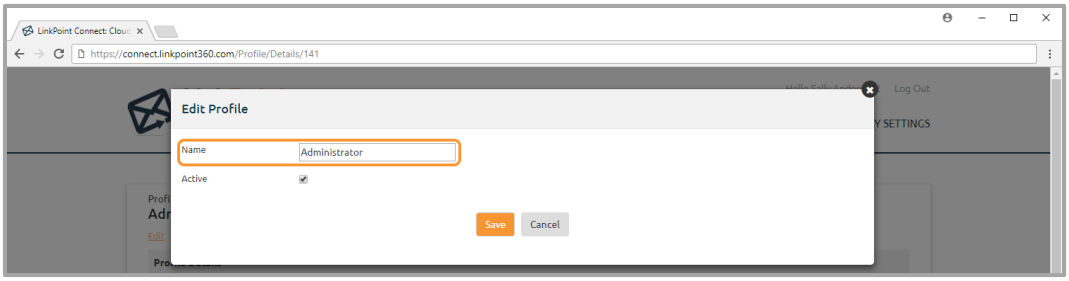
2 Select the **Edit** link to the left of a Profile Name.



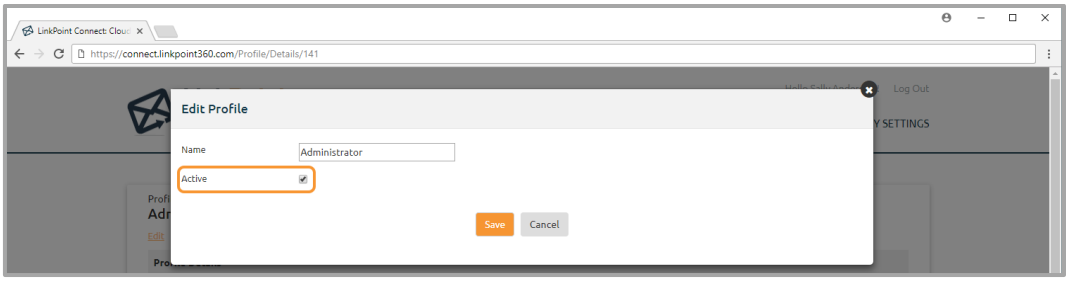
Tip: You can also edit a Profile by navigating to a specific Profile page and selecting the Edit link under the Profile name.



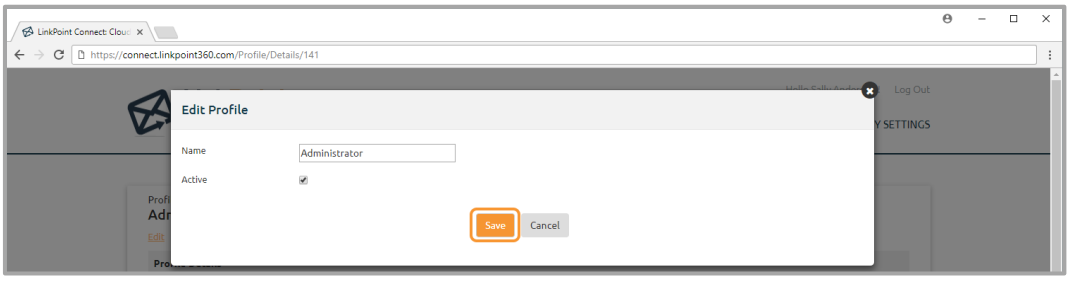
3 Update the name of the Profile as needed.



4 Deselect the **Active** checkbox to disable the Profile. This will deactivate all of the Users in the Profile, preventing them from syncing data or counting toward a Subscription License Seat Count. Select the **Active** checkbox to enable a Profile and allow those users to access Cloud Edition.



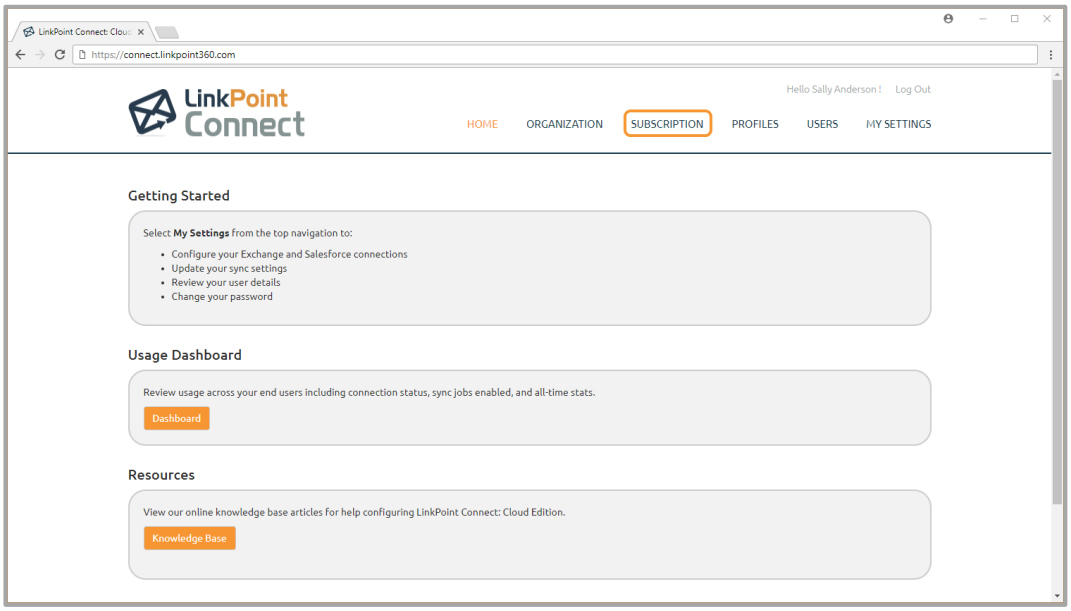
5 Click **Save** to confirm the changes and then close the **Edit Profile** window.



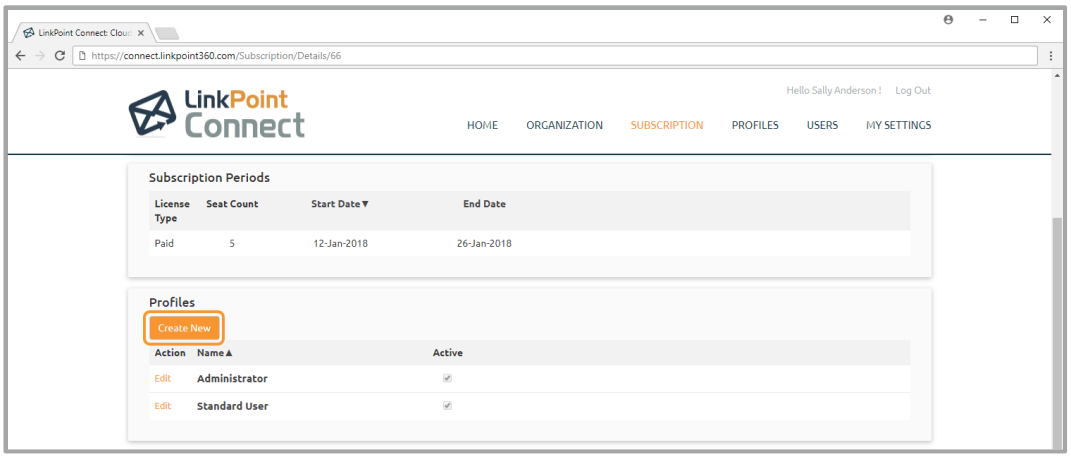
Creating a New Profile

Admins can create new Profiles for a Subscription to organize Users based on specific criteria. Examples include creating Profiles for groups of employees by department (i.e. Sales, Marketing), by division or team (i.e. EMEA Team, NA Team), or by existing workflow permissions (i.e. all users who can calendar sync, all users who are not allowed to calendar sync). Profiles can also be configured to mirror profiles already established within Salesforce. In this section, you will learn how to create a new Profile.

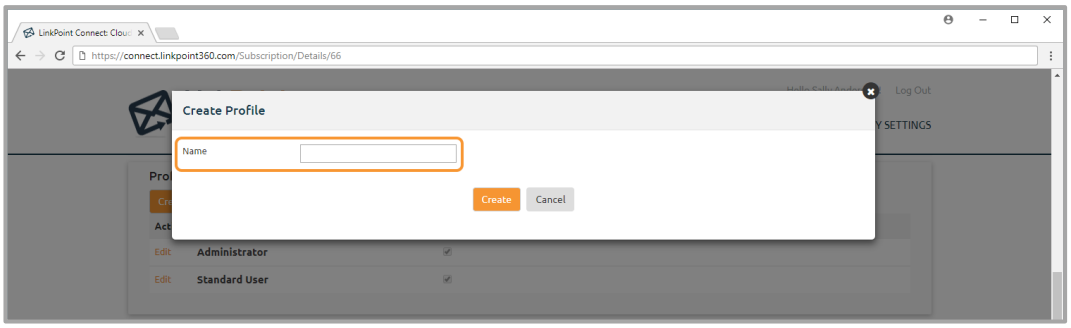
1 Log into Cloud Edition and select **Subscription** from the top navigation.



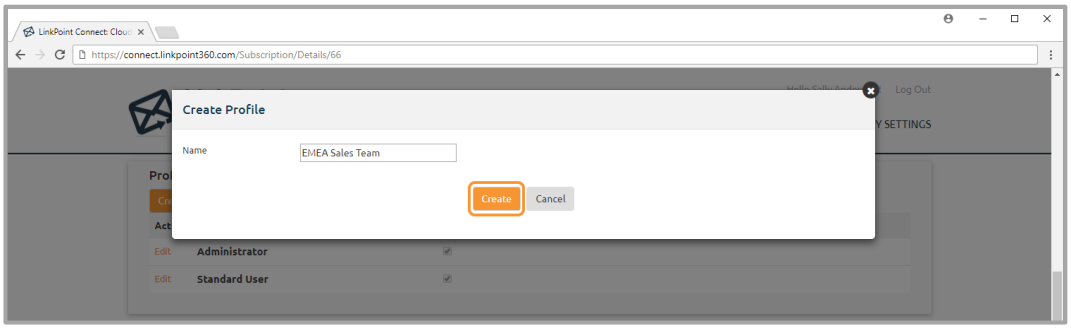
2 Locate the **Profiles** section for the Subscription and click the **Create New** button.



3 Enter a **Name** for the Profile in the corresponding field.



4 Click **Create** to save the changes and generate the new Profile.

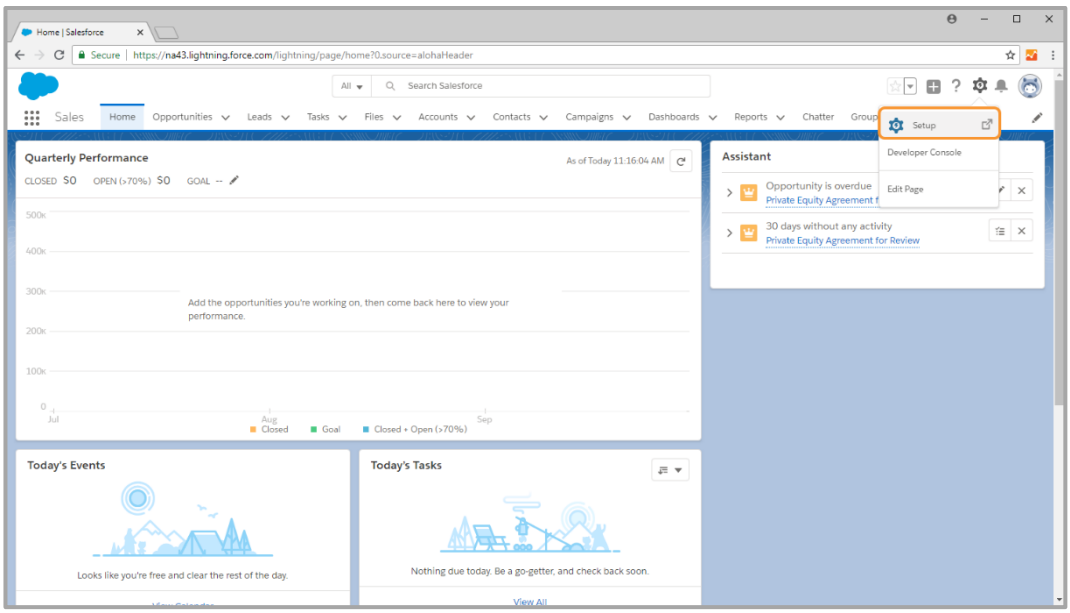


Tip: The new Profile can now be used when importing new users or to reassign an individual user.

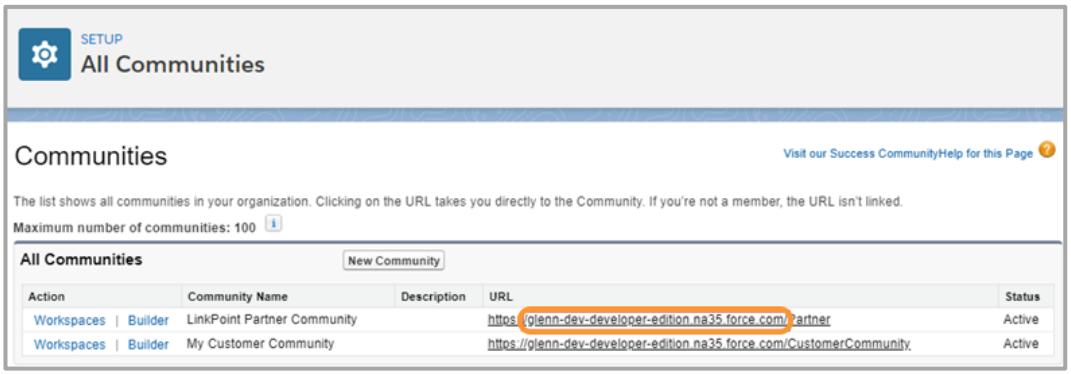
Configuring Profiles for Partner Community Users

Customers with Salesforce Partner Community Users will need to configure the Salesforce Host at the Profile level within Cloud Edition. In this section, you will learn how to configure Profile settings to support Partner Community integration.

1 Log into Salesforce, select **Setup**, and navigate to **All Communities.**

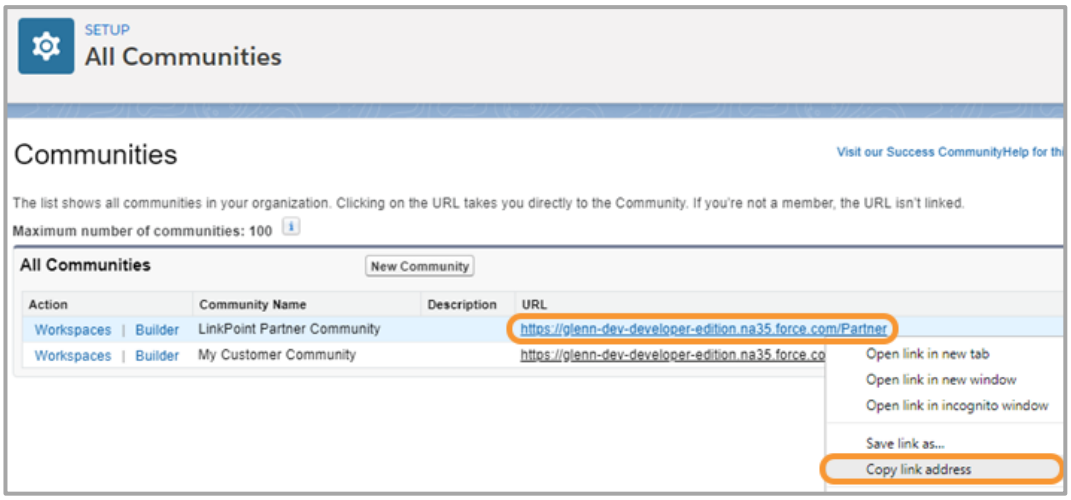


2 Locate the Partner Community URL and copy the URL to a text document for reference.



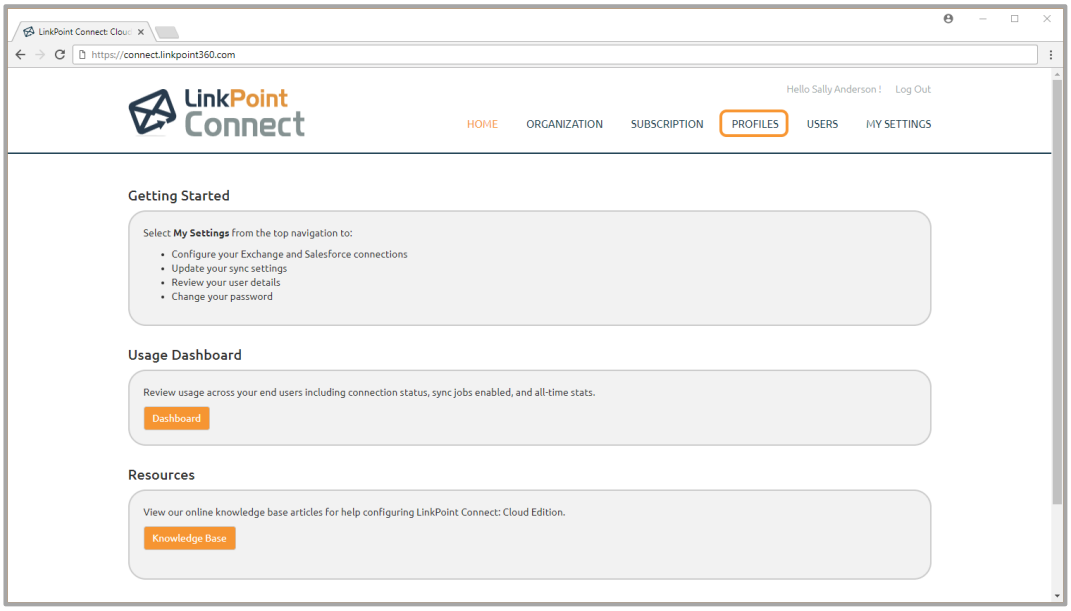
Example: In this example, the URL to note for later is *glenn-dev-developer-edition.na36.force.com/partner*

3 Locate the Partner Community ID. Right click the Partner Community URL and select Copy link Address from the menu. Copy the ID to a text document for reference.

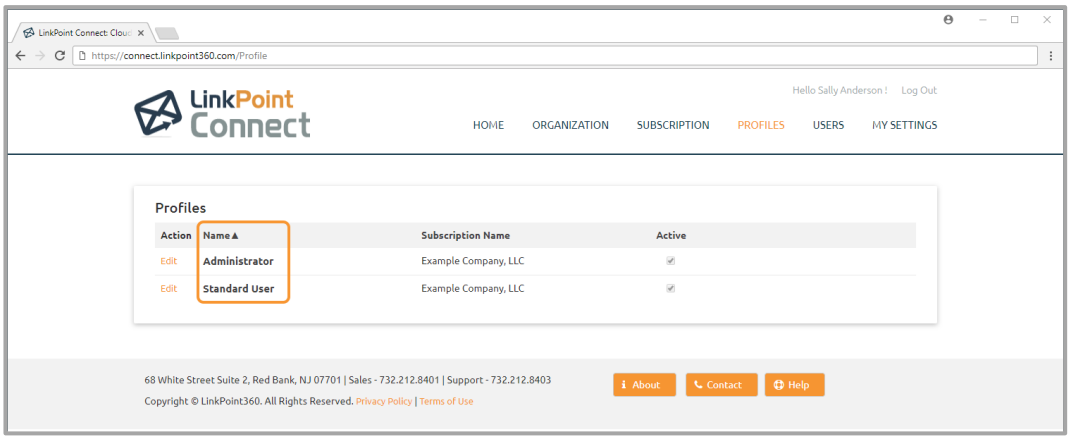


Example: In this example, the option to **Copy link address** provided the URL: *https://glenn-lp360-dev-ed.my.salesforce.com/servlet/networks/switch?networkId=0DB4100000000ou*. The Partner Community ID is the last section of the URL: *0DB4100000000ou*.

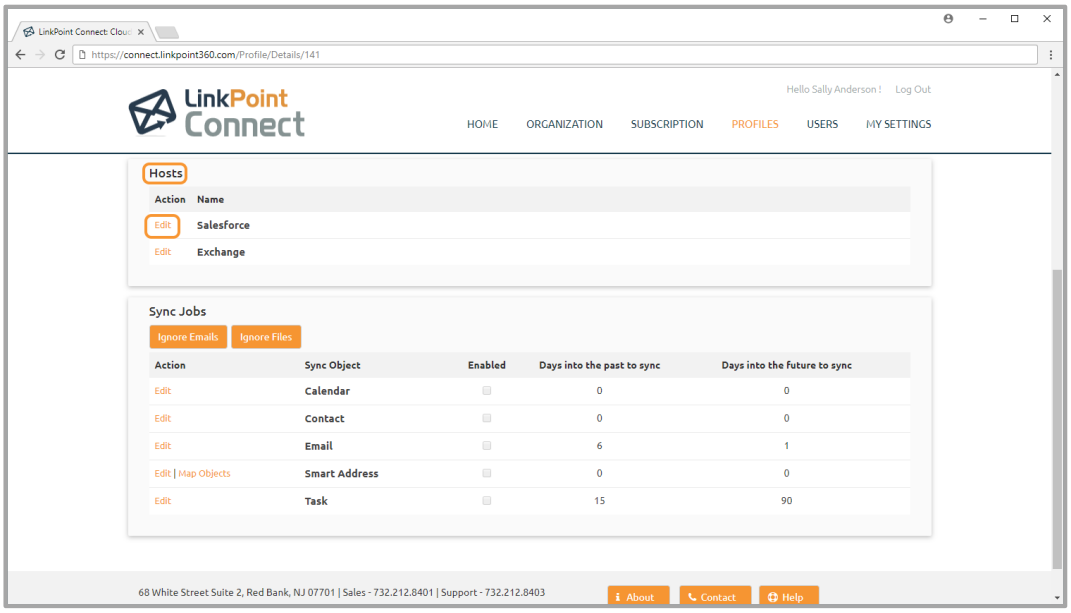
4 Log into Cloud Edition and select **Profiles** from the top navigation.



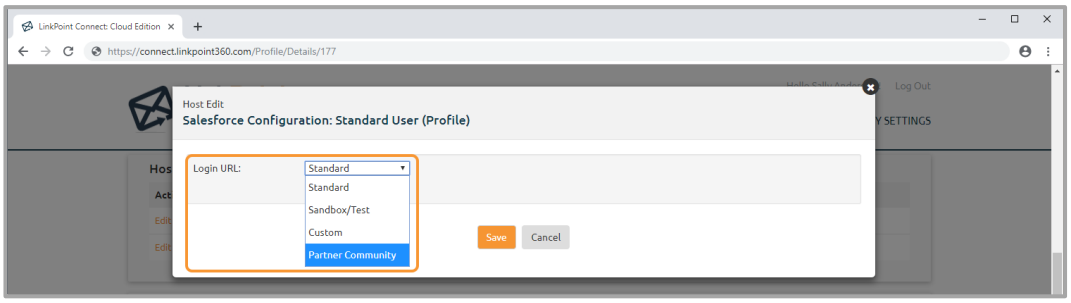
5 Select a **Profile Name** to view the full Profile.



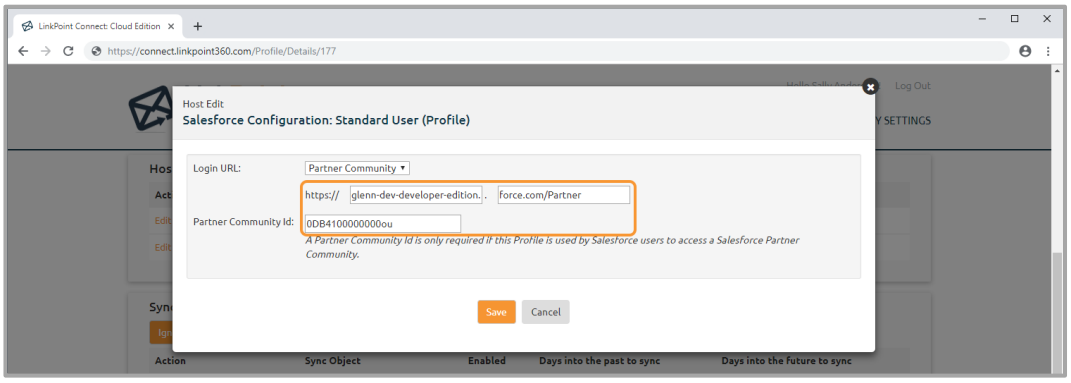
6 Select the **Edit** link for the Salesforce Host to view the Salesforce connection options.



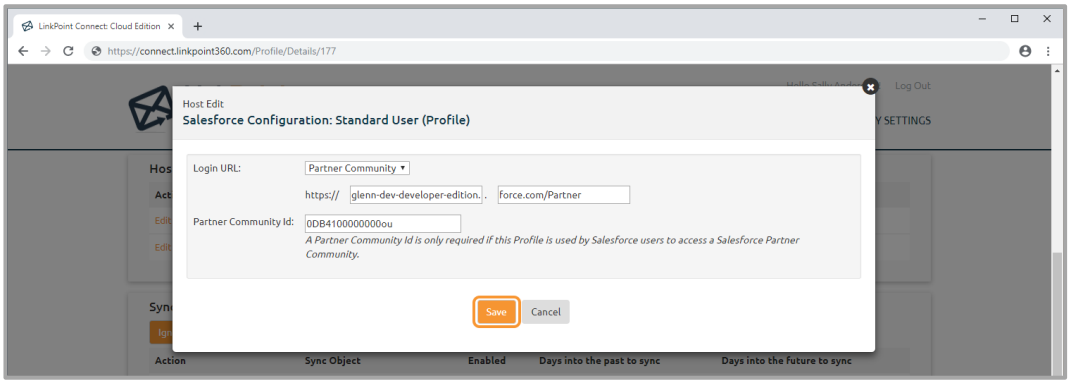
7 Select the **Login URL** drop-down list and select **Partner Community**.



8 Enter the **Login URL** and **Partner Community ID** information noted in Steps 2 and 3.



9 Click **Save** to confirm the changes and then close the **Edit Profile** window.

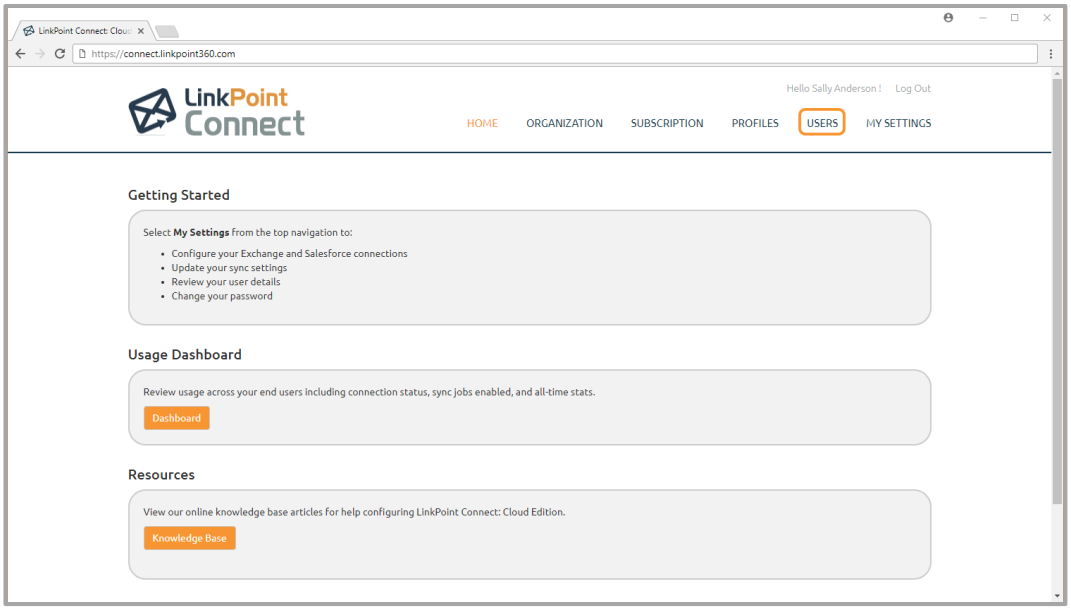


Configuring Users

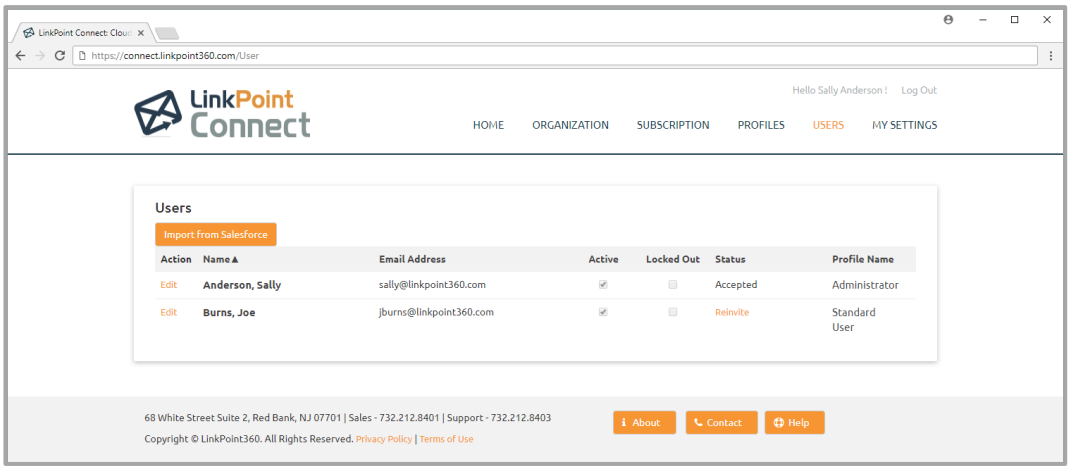
Viewing End User Details

A User is the final level of the Cloud Edition hierarchy, falling under a Profile. Users are individuals who have access to Cloud Edition and can connect their instance of Salesforce and Exchange using personal credentials. An Admin can choose which Users to import and provide access to the system. Users inherit any default or locked settings established on the Organization, Subscription, and/or Profile levels. On the User level, the Admin can act on behalf of a User, view all of the User details, and edit User details. In this section, you will learn how to view the complete User list and view individual User details as an Admin.

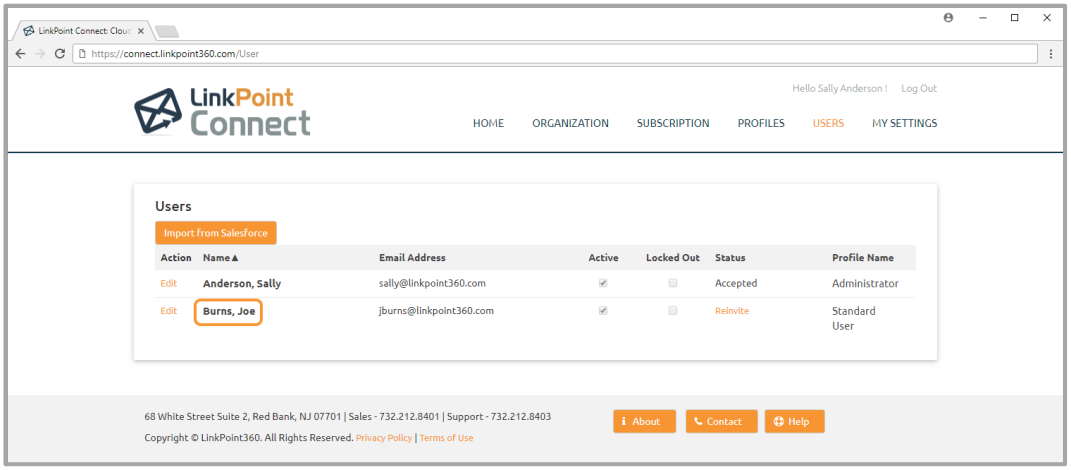
1. Log into Cloud Edition and select **Users** from the top navigation.



2 Review the list of **Users** to view basic information for each individual.



3 Click the **Name** of the User to view their complete User Settings page.



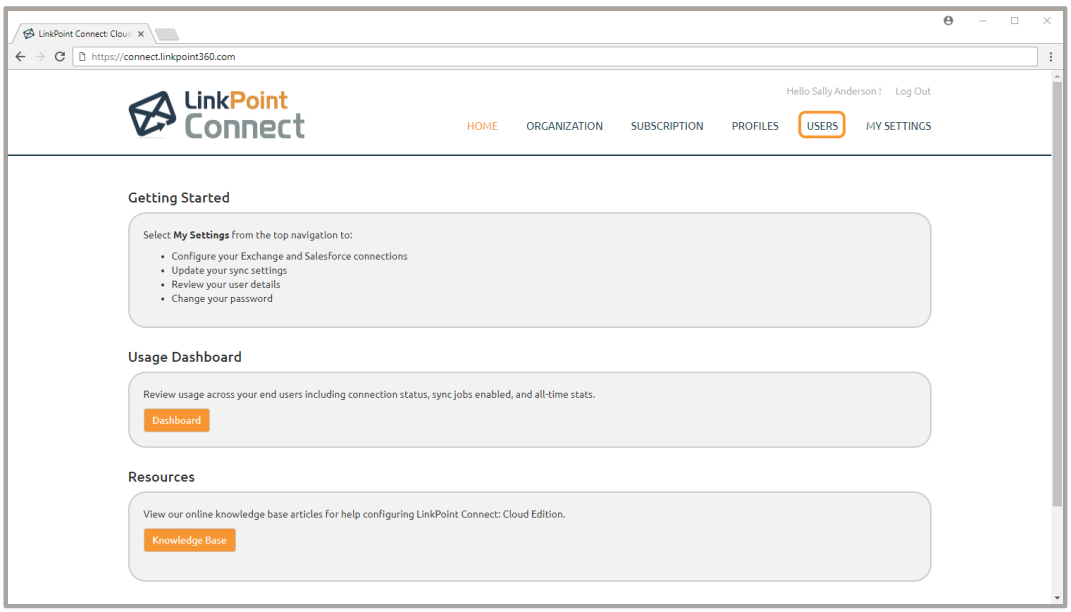
Additional Resources: Learn more about editing user information in the **Editing User Details** section of this User Guide. Learn more about how to add users your Cloud Edition account in the **Importing Users** section of this User Guide.

Importing Users

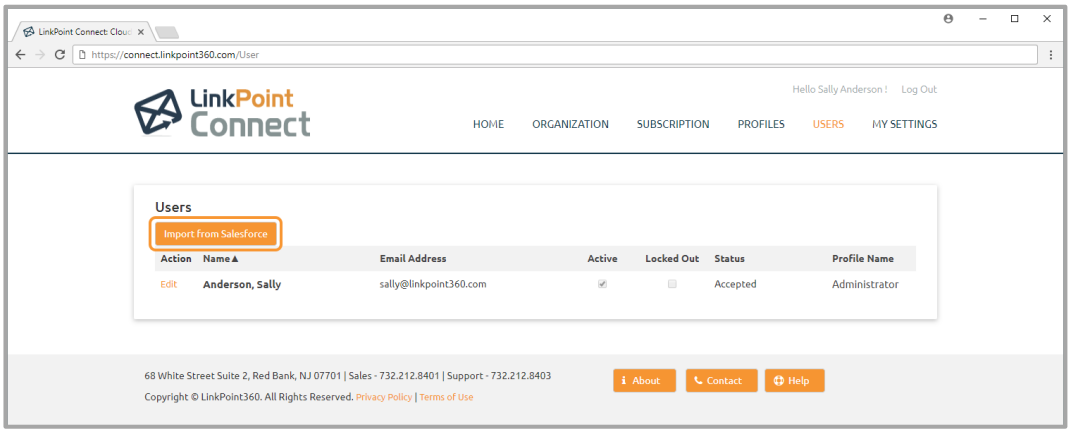
Admins can add Users to their Cloud Edition account using the import tools available for specific Profiles. Admins can choose to import new Users to the default Profiles, to custom created Profiles, or to Profiles that correspond with the Profiles that exist in their instance of Salesforce. In this section, you will learn how to import Users.

Tip: To import users from Salesforce, the Admin must be connected to Salesforce as a User. Connection to an Exchange Host is not required.

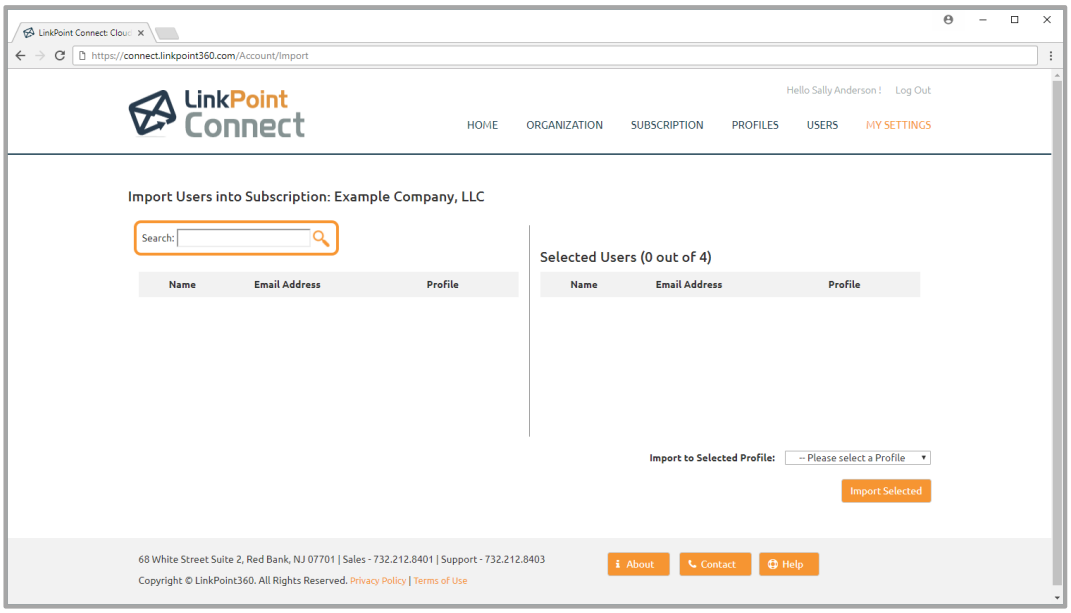
1. Log into Cloud Edition and select **Users** from the top navigation.



2. Click the **Import from Salesforce** button.

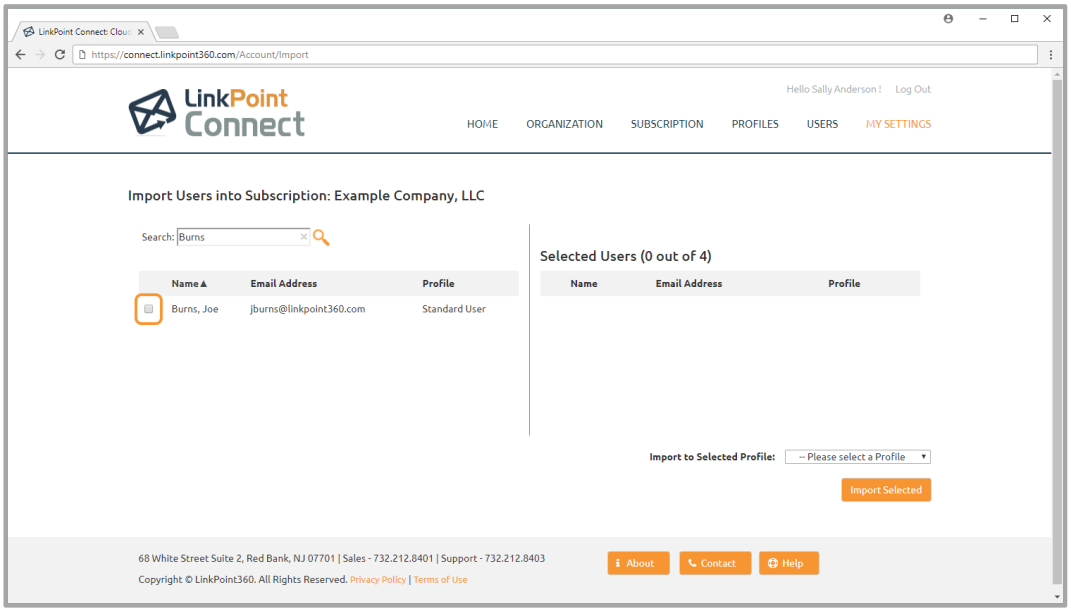


3 Enter a first name, last name, email address, or Salesforce profile name in the **Search** field, and click the search icon. This will return all results with matching Salesforce User records containing the word or phrase.



Tip: You can search for partial phrases, parts of Profile names, or specific Users. Cloud Edition will return results for all partial or complete matches.

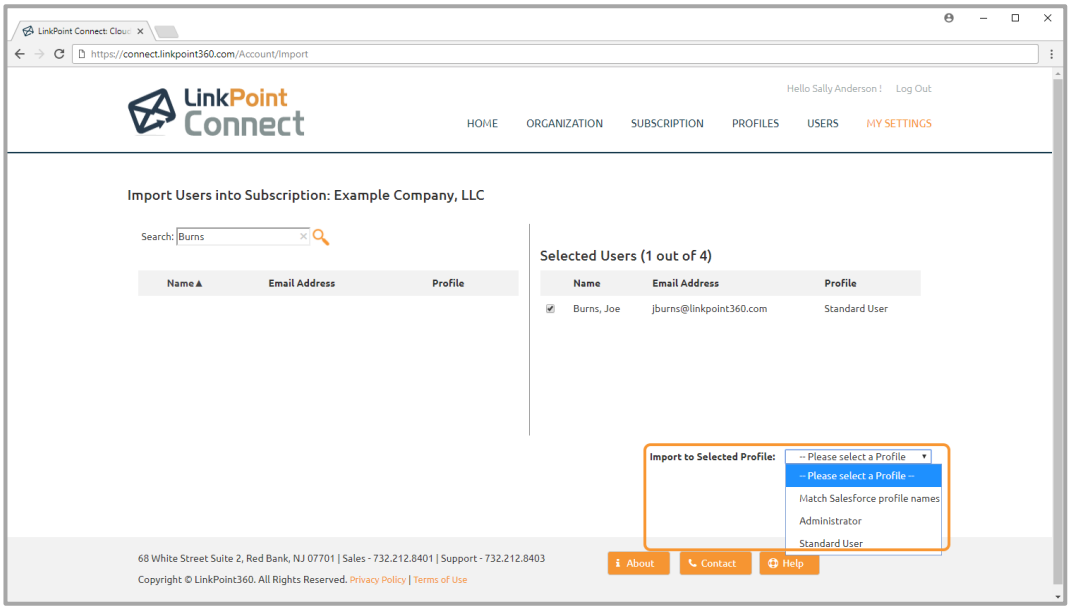
4 Review the list of Salesforce Users on the left side of the screen. Select the checkbox for each User to import. Continue to search for Users and add them to the **Selected Users** list on the right side of the screen as needed.



Tip: The count for the Selected Users list will indicate how many you have selected for import compared to how many licenses you have available with your current Subscription. If you want to import more users than you are allotted, contact your Account Executive to increase your Subscription or consider deactivating current Users who may no longer need system access. You can select up to 50 Users per import.

Tip: The maximum number of users that can be imported at once is 50 Users. If your subscription includes more than 50 licenses, you will need to import your Users in batches of 50 or less.

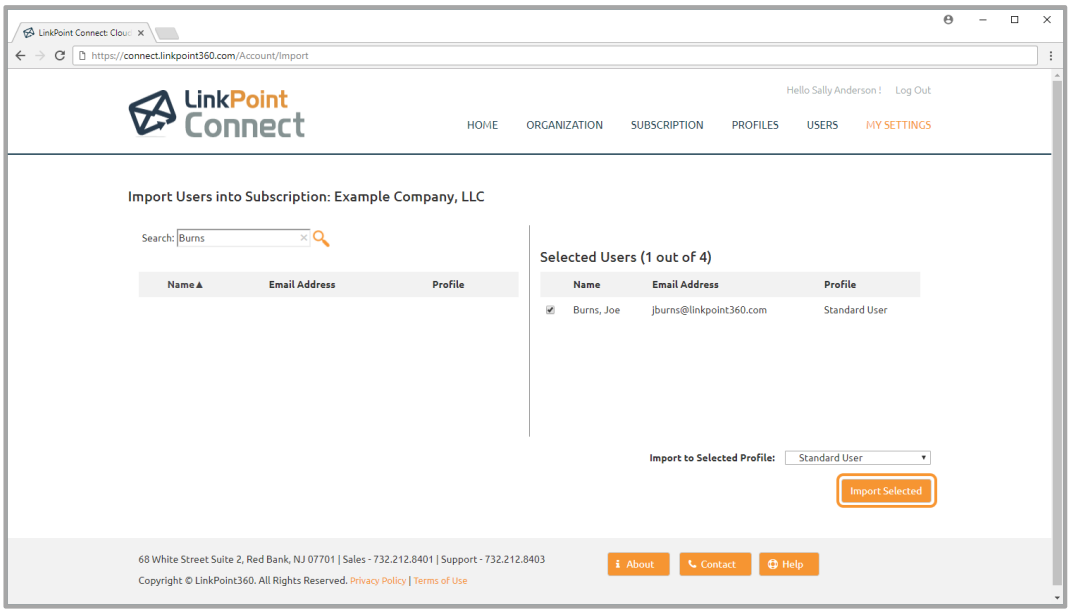
5 Review the options in the **Import to Selected Profile** drop-down list. You can add the Selected Users to one of the existing Cloud Edition Profiles in the list. Or, you can choose the option to **Match Salesforce profile** to import the Users and align them with Profiles that correspond to their Salesforce profile.



Tip: The import acts on Users in bulk. You can only select one Profile for each group of Selected Users. If you are working with multiple Profiles, add the Users to the Selected Users list in batches by Profile and conduct multiple imports to organize the users accordingly.

Tip: Note that you can only import a User once and that a user can only belong to a single Profile. Profiles cannot be edited by Admins or End Users. Contact your Account Executive if you need assistance making changes to user Profile assignment.

6 Click the **Import Selected** button to finalize the import. The message **Successfully Imported Users** will display when the import is complete.



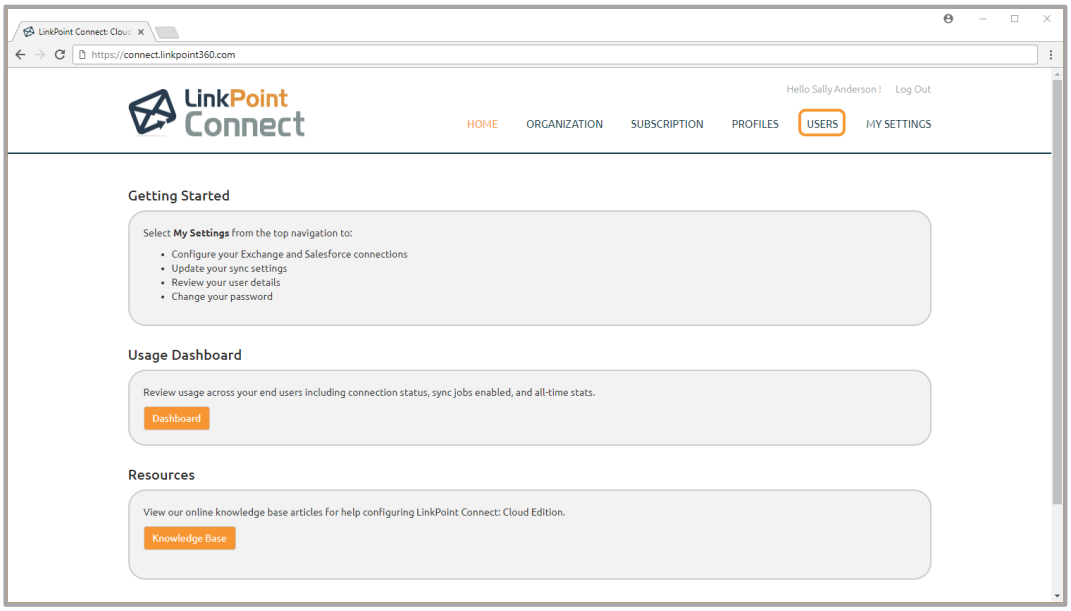
7 Each end user will receive an email from LinkPoint Connect: Cloud Edition prompting them to finish their individual set up process. The User will create a password and connect to the Salesforce and Exchange Hosts. Users who have access to changing Sync Job settings will be able to do so by accessing the My Settings page once the initial configuration is complete.

Tip: LinkPoint360 Support can assist with user management and invite additional users to a Cloud Edition Account per Admin request based on email address. This allows for users to be added from alternate Salesforce orgs and helps with change management if Admin(s) should leave an organization.

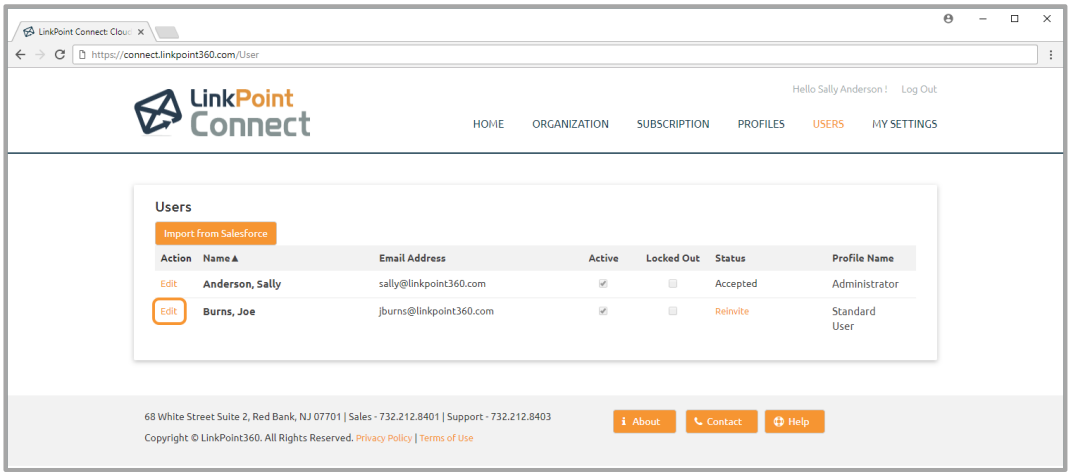
Editing End User Details

Admins can act on behalf of Users to edit their User Details or initiate a password reset. These options appear on the User pages. Note that individual Users will need to log in and enter their credentials to configure the Host information for Salesforce and Exchange. In this section, you will learn how to edit User details as an Admin on behalf of a User.

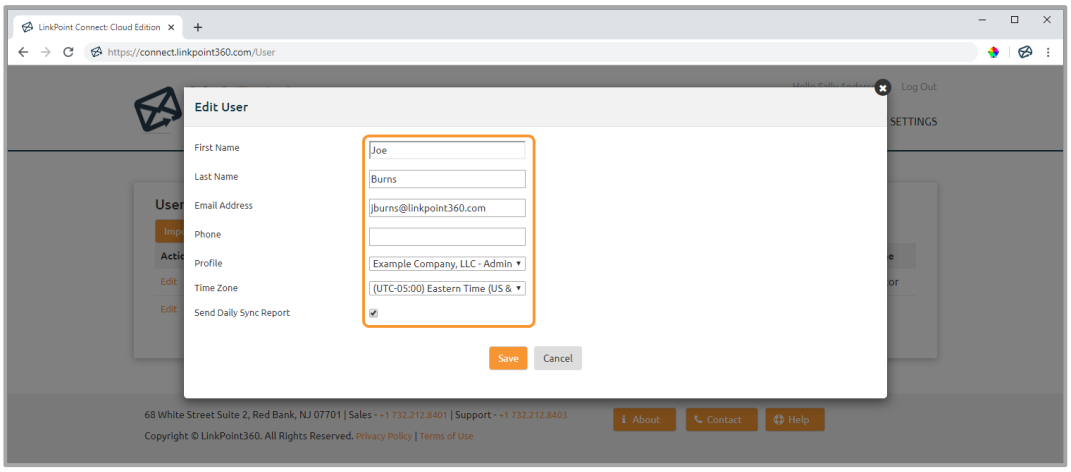
1 Log into Cloud Edition and select **Users** from the top navigation.



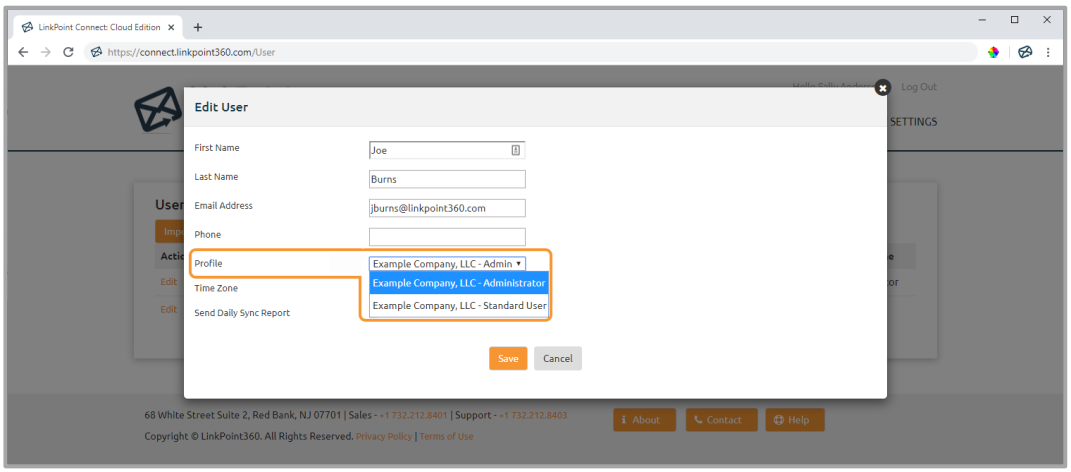
2 Review the list of Users and select the **Edit** link to the left of the User Name.



3 Review the existing field data and make any changes necessary.

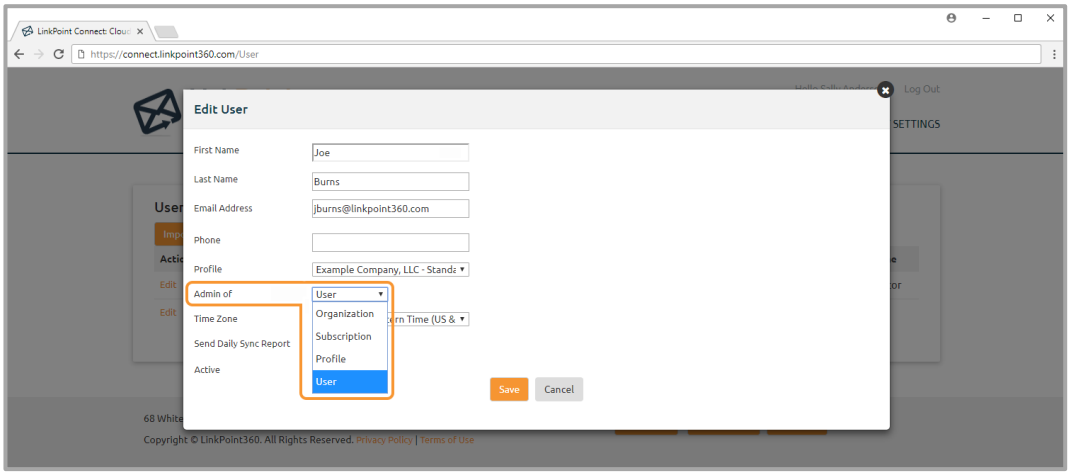


4 Select a **Profile** from the drop-down list to move the user to a different Profile.



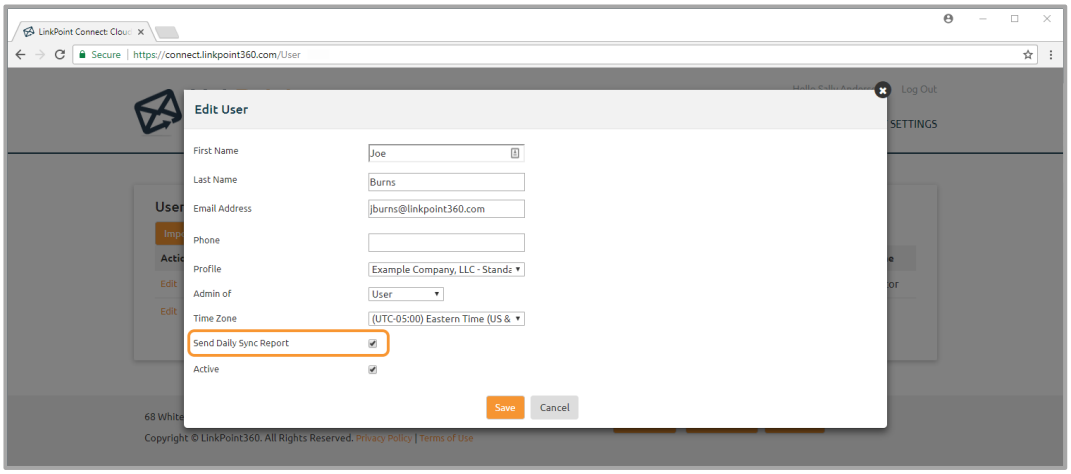
Warning: If you move an existing user who already has established sync settings to a new Profile that has *locked* sync settings, the new Profile settings will override anything the user had previously configured. This will change the expected sync behavior for the user and may impact how they will need to interact with the software (i.e. if they were using a Sync All mode and now their Profile enforces a mode that requires Designation, they will need to use Designations moving forward). Cloud Edition will also rebuild the user's Sync History to ensure that all of the sync rules in the new Profile are respected and reflected in eligible data. This erases existing Sync History information for the user, and only displays sync details for items synced with the new Profile criteria. Be sure to communicate any changes to the end user, as they are not notified when an Admin makes changes to their settings.

5 Change the **Admin of** selection to make a User an Administrator of a particular Organization, Subscription, or Profile. This will give the User access to change, set defaults, and lock settings for all Users within the level they are an Admin of.

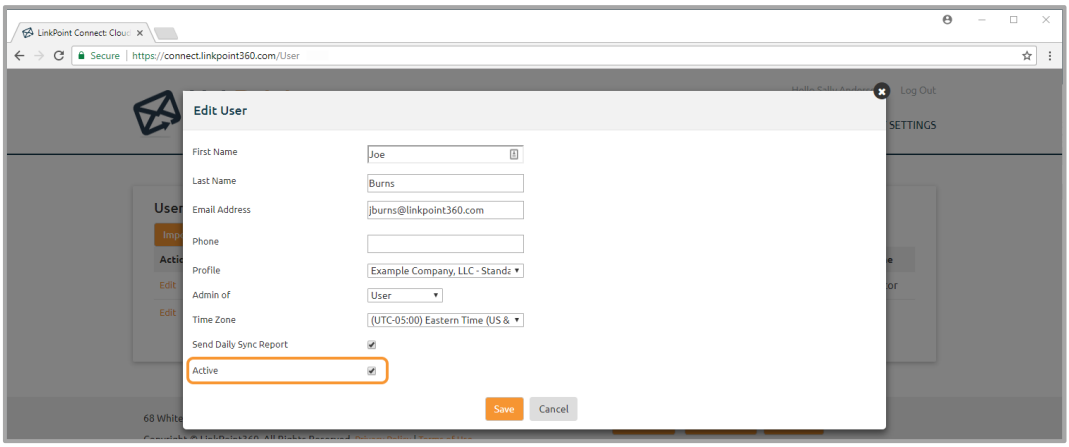


Tip: All imported Users are set as Standard Users with no administrator rights in the system. The only person with complete Admin access is the first person who created the Organization Account. An Admin can choose to make other Users an Admin of other levels in the hierarchy, but they can never be assigned to a level higher than the Administrator itself. This can be useful when assigning other Users as Admins of the Profile they are in, allowing managers or team leads to be responsible for how that Profile syncs data and to help troubleshoot for their colleagues.

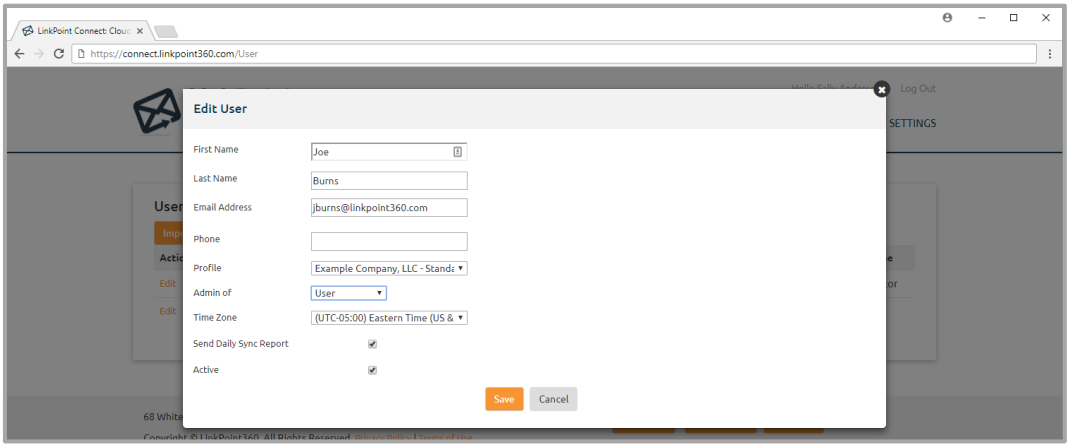
6 Select the **Send Daily Sync Report** option for the system to email the user a Sync Report including Sync History details. Deselect the option to disable the report.



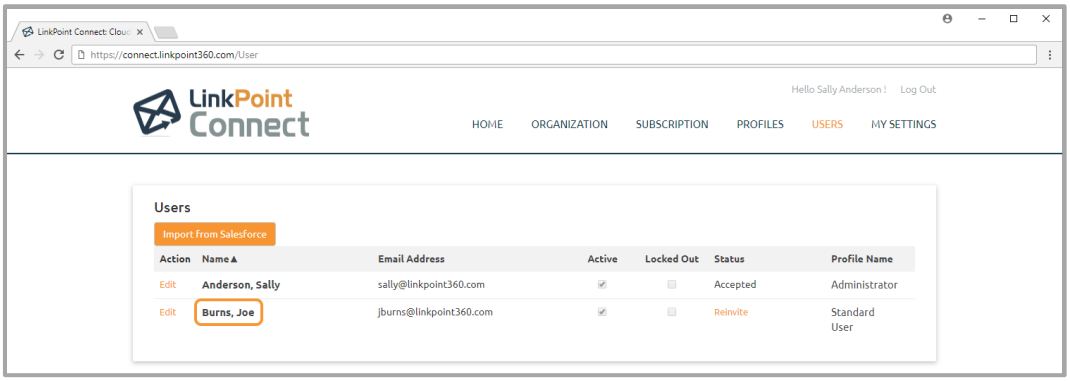
7 Deselect the **Active** checkbox to deactivate the User. This will disable any Sync Jobs for the User and lock the User out of Cloud Edition. Note that all Users are set as Active by default when imported.



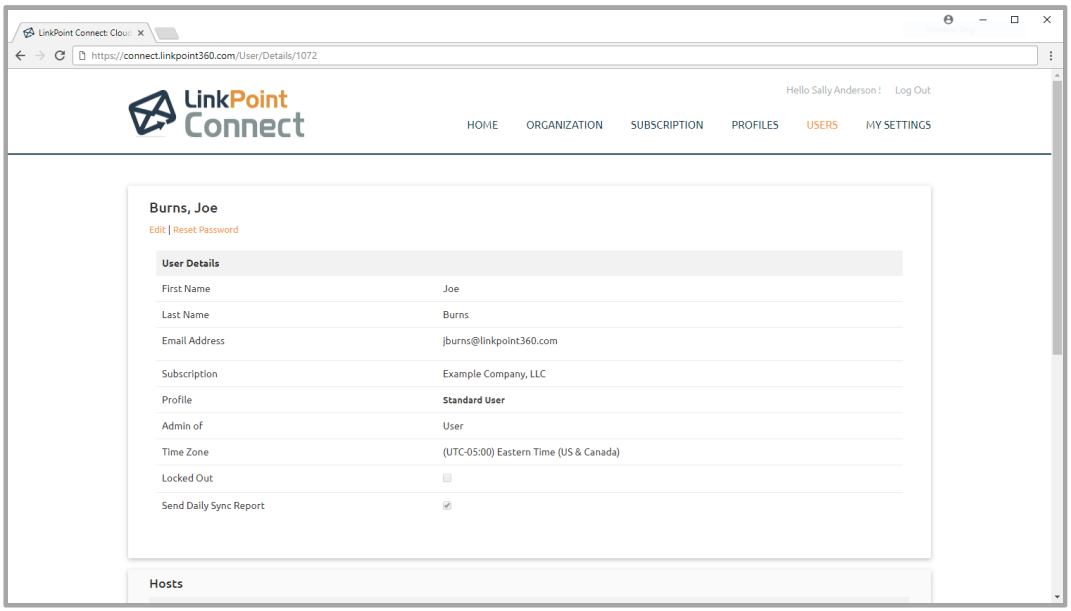
8 Click **Save** when finished.



9 Click a User **Name** to visit their full User Details Page.



10 Review the available User Details and Sync Jobs information and make any changes necessary.

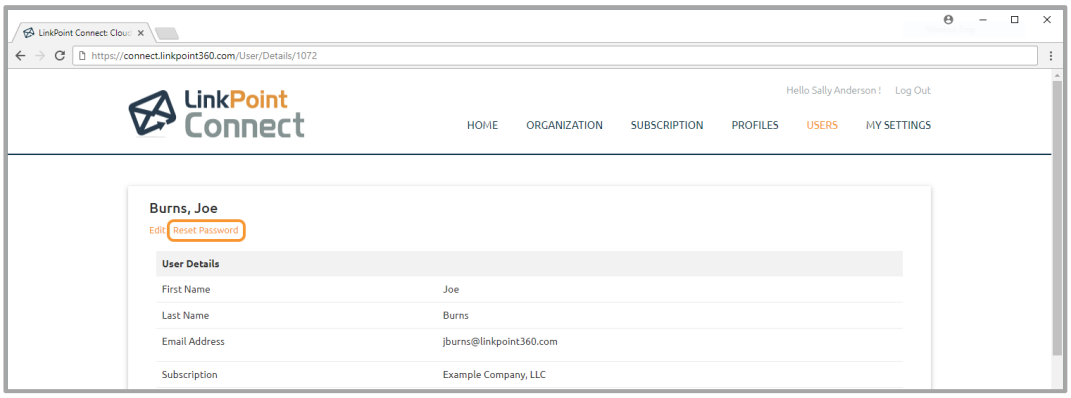


Warning: When an Admin edits a User's Details and/or Sync Jobs, the changes will immediately impact how that User's data syncs between Salesforce and Exchange. Be sure to confirm before saving your changes.

Tip: Admins are able to view most User information but are not able to connect to a Host on the User's behalf. The Admin can see if a User is connected to Salesforce or Exchange but cannot enter or edit the User's Salesforce or Exchange credentials.

Tip: Admins can review the Calendar Sync History and Email Sync History for any User to learn how the user is leveraging the software or to help a User adjust configuration settings to change sync results.

11 Select the **Reset Password** link under the User Name to initiate a password reset for the User. The User will receive an email from the Cloud Edition system prompting them to change their password to regain access.



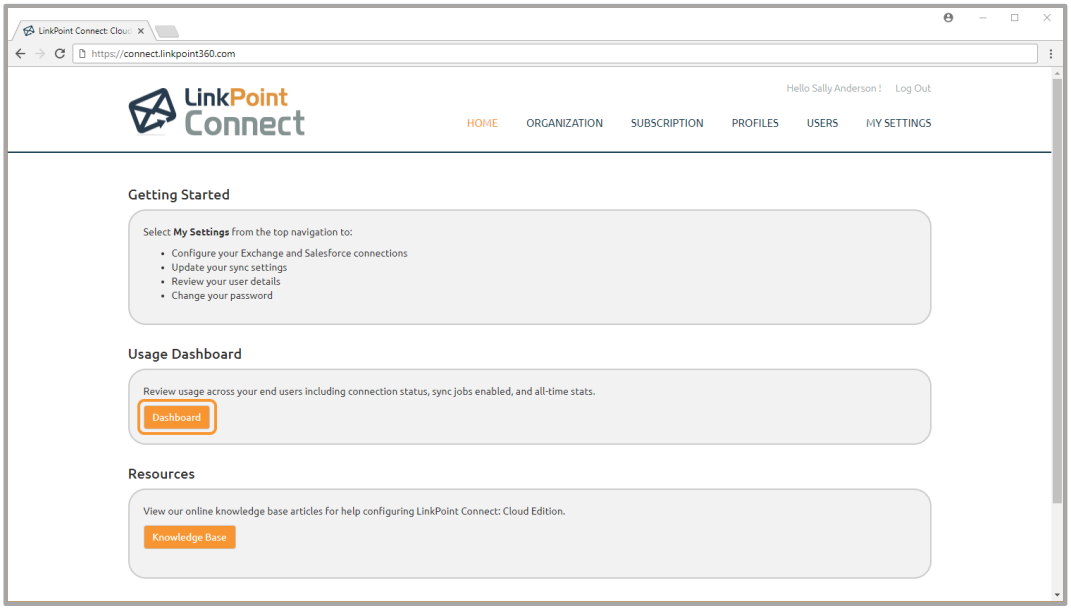
Tip: Admins can use this feature to help Users access Cloud Edition in the event of a forgotten password. The User can also visit the Log In screen and select the option to Change Password to regain access.

Reporting

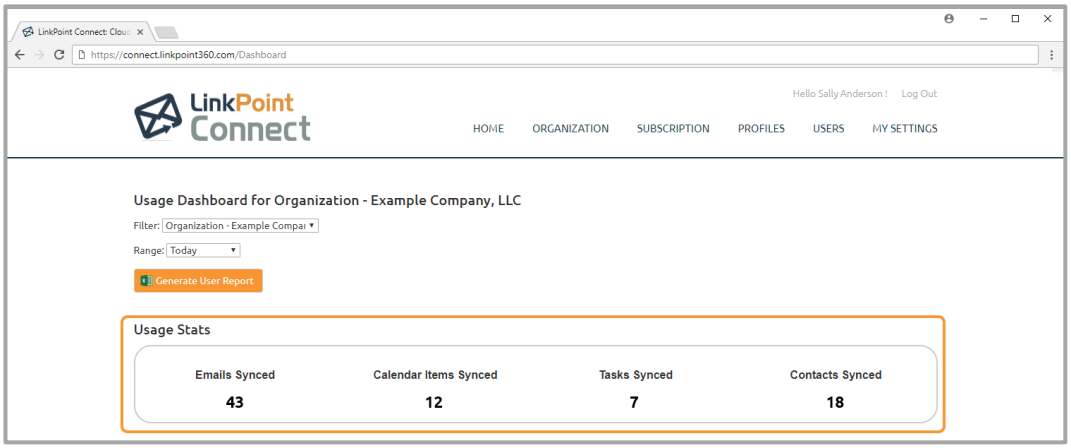
Working with the Usage Dashboard

Admins can review system usage and performance metrics on the Dashboard including Usage Stats, User Status, and User Sync Status. This information is helpful when managing larger user groups, monitoring system adoption, and determining overall ROI and engagement with Salesforce. In this section, you will learn how to access and review the Usage Dashboard.

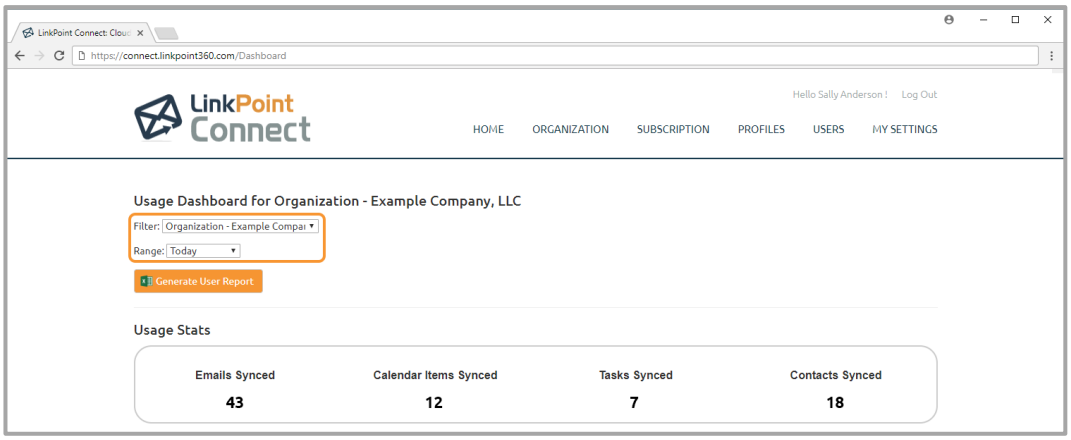
1 Log into Cloud Edition and select **Dashboard** from the Usage Dashboard portion of the home screen.



2 Review the **Usage Stats** section. These stats indicate the total number of Emails, Calendar Items, Tasks, and Contacts that have synced. The default view shows the stats for Today for the Organization.



3 Use the **Filter** and **Range** drop-down options to filter the Usage Stats based on different Subscriptions and Profiles and using different date ranges. The Usage Stats will update dynamically.

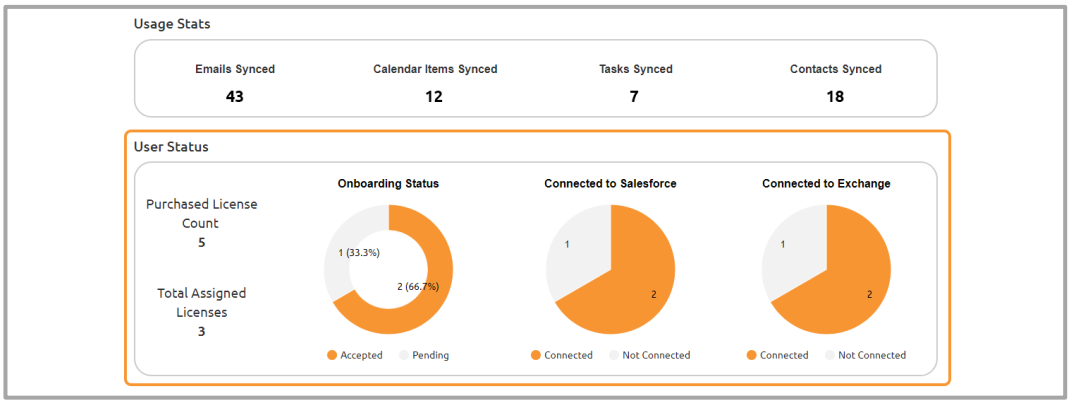


Tip: The **Filter** and **Range** options applied will also affect certain fields when using the option to **Generate User Report**.

Additional Resources: Learn more about downloading user metrics in the **Creating User Reports** section of this User Guide.

4 Review the **User Status** section. These stats demonstrate how the licenses included in the account are being utilized.

- **Purchased License Count:** The number of licenses purchased with your Cloud Edition subscription.
- **Total Assigned Licenses:** The number of licenses allocated to specific users.
- **Onboarding Status:** The breakdown of users who have accepted the email invitation to create their Cloud Edition accounts (Accepted) compared to those users who have not yet set up (Pending).
- **Connected to Salesforce:** The breakdown of users who have connected to their Salesforce account (Connected) compared to those who have yet to do so (Not Connected).
- **Connected to Exchange:** The breakdown of users who have connected to their Exchange account (Connected) compared to those who have yet to do so (Not Connected).



Tip: The User Status section helps Admins maximize their Cloud Edition purchase. Admins can determine if they can add more users or need to purchase additional licenses. The onboarding and connection details illustrate whether any users had difficulty with the set-up process and if the allocated licenses are being effectively used.

Tip: The User Status section of the Dashboard provides a high-level connection overview. The Onboarding Status, Connected to Salesforce, and Connected to Exchange details are included per user in the downloadable User Report for more in-depth review. This is helpful for identifying specific users who need configuration assistance.

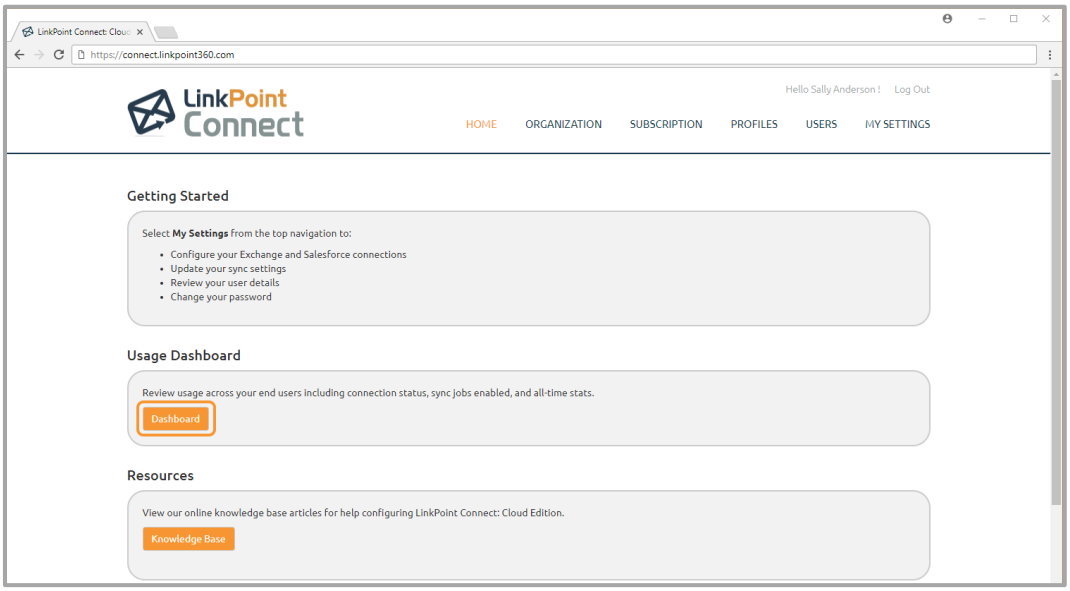
Additional Resources: Learn more about downloading user metrics in the **Creating User Reports** section of this User Guide.

5 Review the **User Sync Status** section. These stats demonstrate how each Sync Job is being utilized. The total number of individuals using each Sync Job is displayed, and disabled Sync Jobs are indicated.

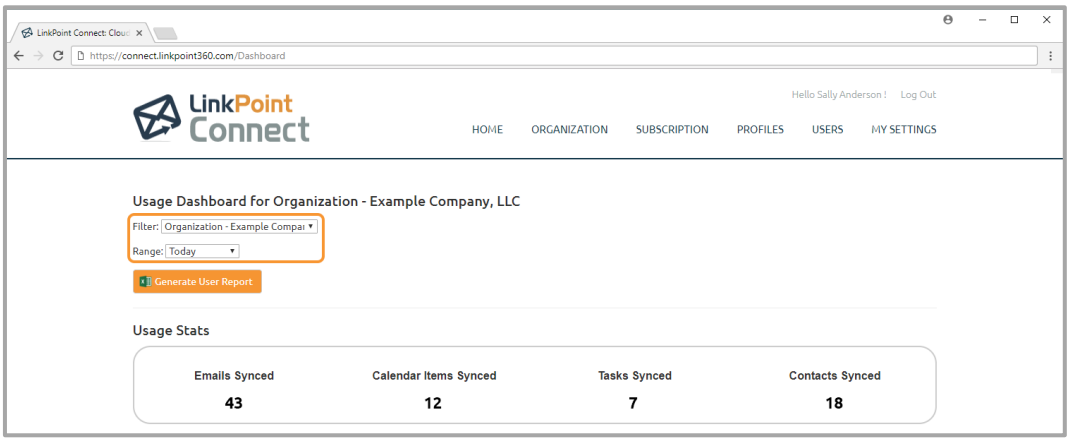
Creating User Reports

Admins can download a full User Report as an Excel file containing per-user details. This report is accessible on the Usage Dashboard and can be filtered to show specific metrics. User Reports help Admins identify users who need connection assistance or who have larger numbers of Unresolved Items that could benefit from coaching or guidance to create the right data in Salesforce. The report also includes totals that can be added up to realize the time and effort saved with an auto-sync solution. In this section, you will learn how to create a User Report.

1. Log into Cloud Edition and select **Dashboard** from the Usage Dashboard portion of the home screen.



2. Use the **Filter** and **Range** drop-down options to filter the User Report output based on different Subscriptions and Profiles and using different date ranges.

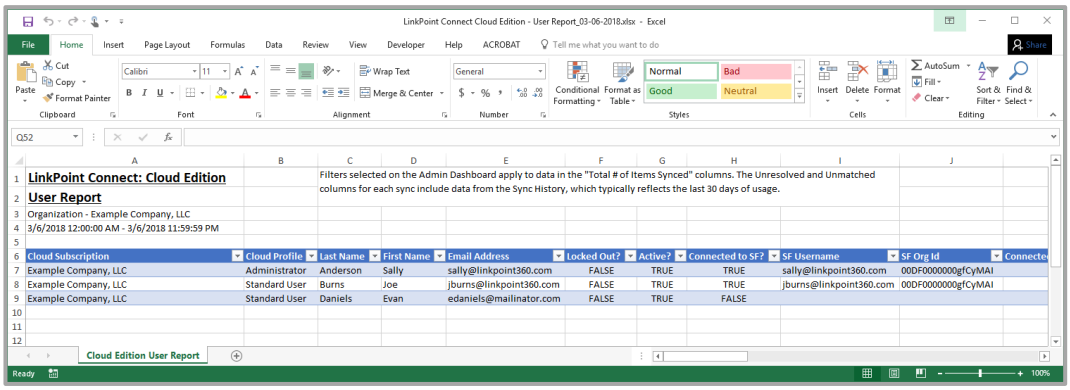


Tip: Filters selected on the Admin Dashboard apply to data in the *Total # of Items Synced* columns. The Unresolved and Unmatched columns for each sync include data from the Sync History, which typically reflects the last 30 days of usage.

3 Click the **Generate User Report** button to create the report as an Excel file.

4 Open the **User Report** and review the available data and column headers. Note that you can review connection details, sync statistics, and timestamps per user.

- Cloud Subscription
- Cloud Profile
- Last Name
- First Name
- Email Address
- Locked Out
- Active
- Connected to SF
- SF Username
- SF Org Id
- Connected to Exchange
- Exchange Username
- Email Sync Enabled
- Date/Time of Last Email Sync
- Total # of Unresolved Emails
- Total # of Emails Synced
- Total # Unmatched Leads/Contacts – Email
- Calendar Sync Enabled
- Date/Time of Last Calendar Sync
- Total # of Unresolved Calendar Items
- Total # of Calendar Items Synced
- Total # Unmatched Leads/Contacts – Calendar
- Contact Sync Enabled
- Date/Time of Last Contact Sync
- Total # of Unresolved Contacts
- Total # of Contact Synced
- Task Sync Enabled
- Date/Time of Last Task Sync
- Total # of Unresolved Tasks
- Total # of Tasks Synced
- Smart Address Enabled

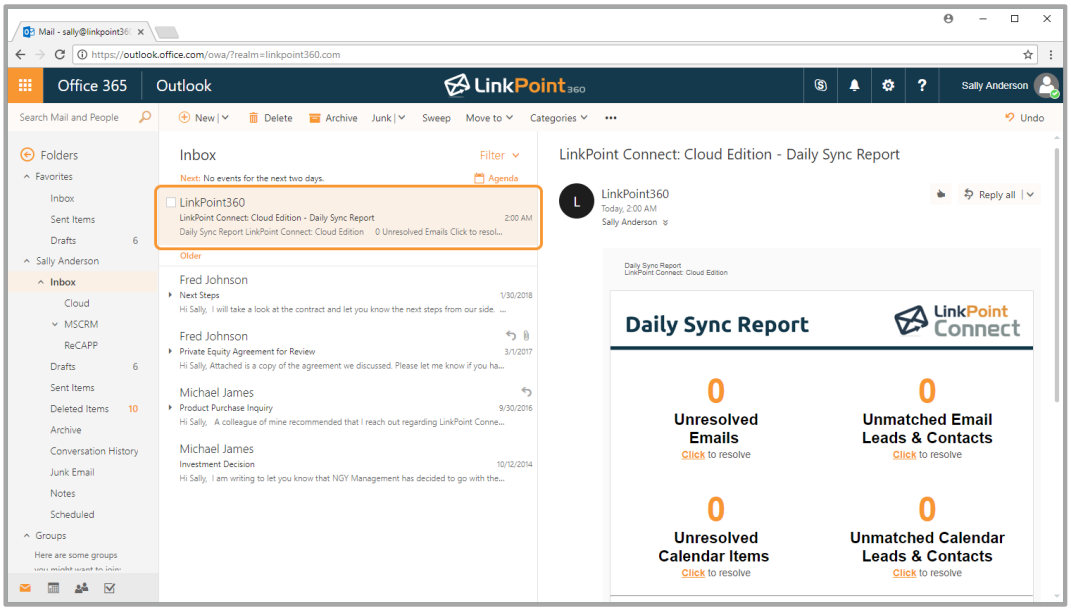


Viewing Daily Sync Reports

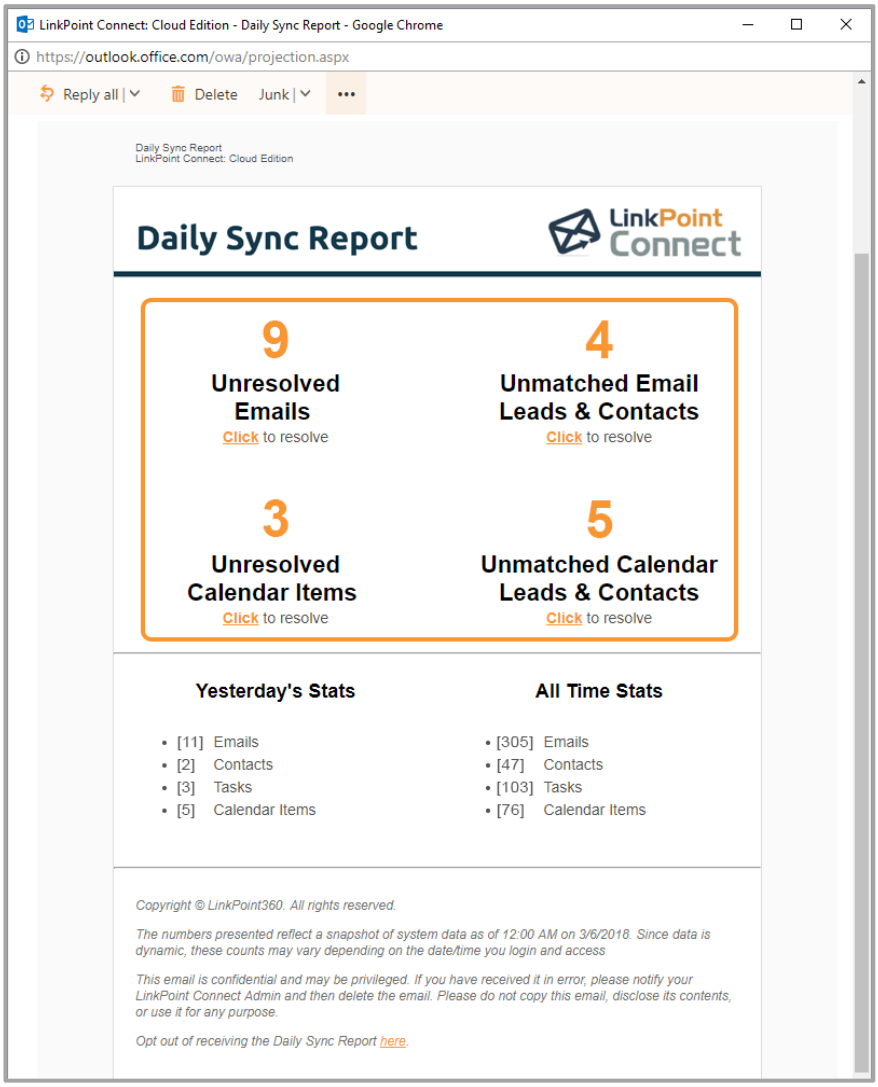
The Daily Sync Report is emailed to all active users with a summary of sync usage and outstanding items. This information is designed to encourage users to ensure that the correct Contacts and Leads are created in Salesforce to boost CRM adoption and ensure that communications can be correctly matched and recorded based on the sync rules in place. The notification also includes a summary of All Time Stats to demonstrate business value as well as Yesterday's Stats to show the change on a daily basis. In this section, you will learn how to review the Daily Sync Report.

Tip: The Daily Sync Report is enabled by default for all existing and new users. The report is emailed overnight to each end user.

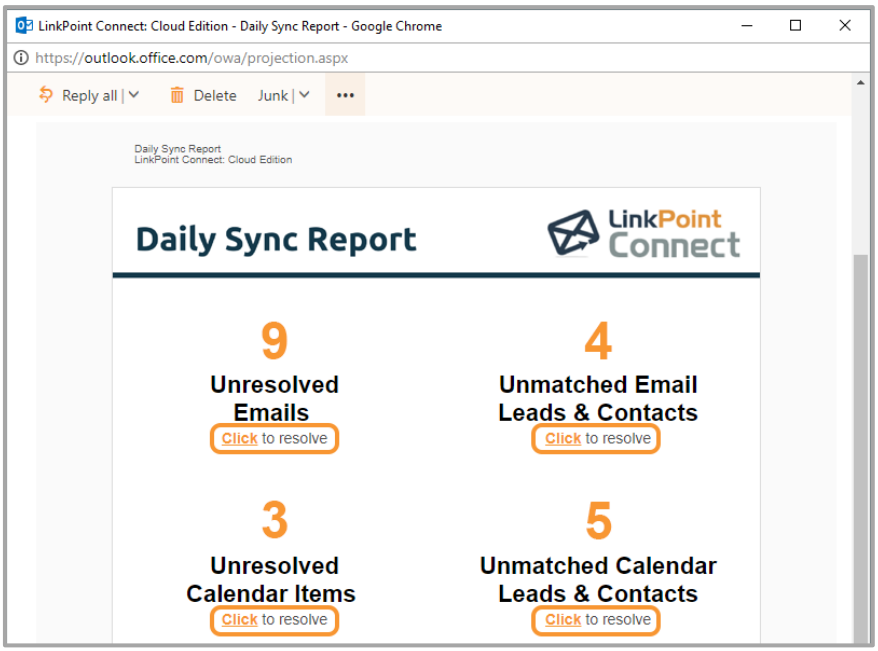
1. Locate the email with the Subject **LinkPoint Connect: Cloud Edition - Daily Sync Report** in your inbox.



2 Review the first section of the report. Note that it displays the number of Unresolved Emails and Calendar Items currently included in the Sync History along with the total number of Unmatched Leads and Contacts for both Sync Jobs.

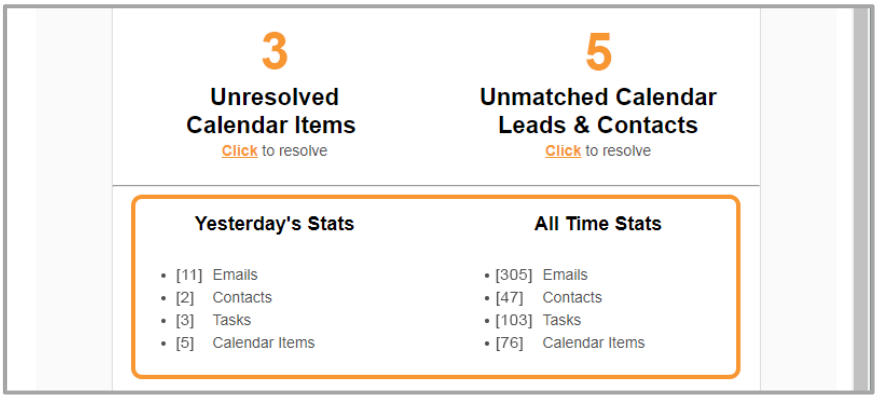


3 Click the **links** to launch the Sync History and resolve any issues preventing items from syncing. Items will be unresolved or unmatched when no matches are found in Salesforce during the sync.



Tip: This report is designed to help users see which Leads and Contacts need to be created in Salesforce in order for items to be able to sync. Items remain unresolved or unmatched until an action resolves the sync issue (i.e. adding a matching Contact in Salesforce, changing a sync setting to include the item in the next sync) or until the item exceeds 30 days of sync attempts.

4 Review the second section of the report. Note that it displays **Yesterday's Stats** as well as the **All Time Stats** for the user.



Tip: These metrics are designed to show end users how their Sync Jobs are being utilized and the amount of time and effort saved with auto-sync functionality.

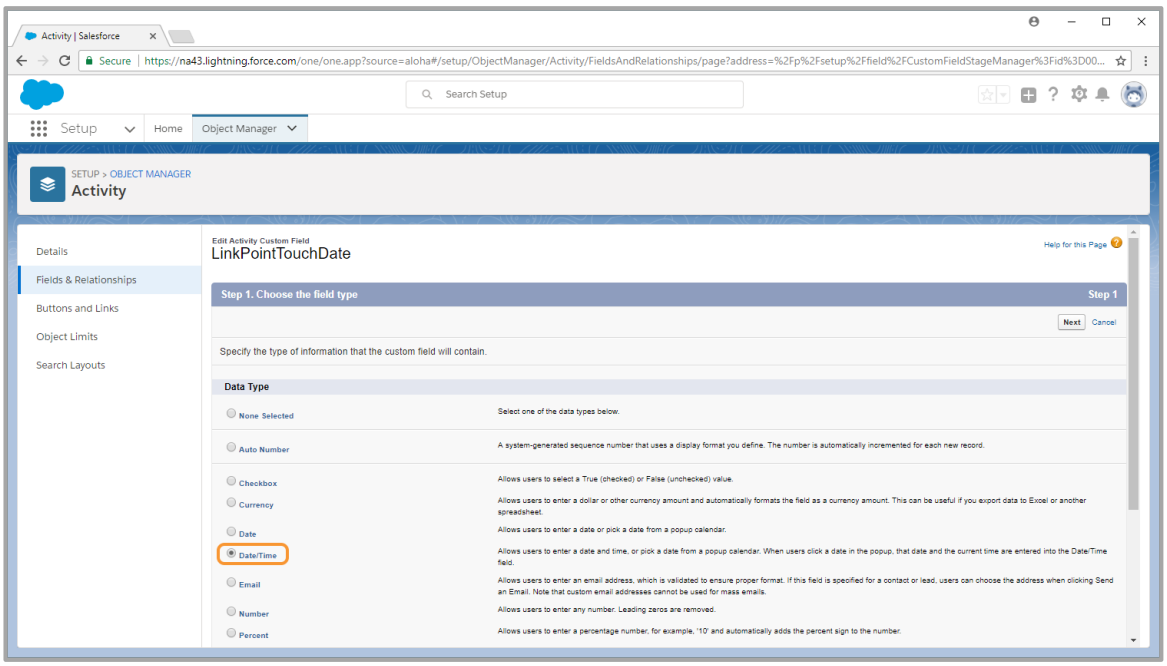
Additional Resources: Learn more about enabling and disabling the Daily Sync Report in the **Editing End User Details** section of this User Guide.

Viewing Usage Data in Salesforce

Companies that roll out Cloud Edition realize increased Salesforce adoption and overall productivity gains. User Reports and the Usage Dashboard provide Cloud Edition Admins with insight into system usage and ROI. Salesforce Admins can create additional reports in Salesforce to reflect Cloud Edition usage and impact on their business. In this section, you will learn how to view Cloud Edition usage date in Salesforce.

Warning: The following steps can only be followed by Salesforce users with Admin privileges to create and alter fields within Salesforce and across and organization. Contact your admin for more information.

1. Create a new Date\Time type field named **LinkPointTouchDate__c** within Salesforce. Add this field to all of the Objects for which you would like to capture metrics.



2. Add the **LinkPointTouchDate__c** field for all users for which the usage report will be run. If the field and objects are not applied to the correct users with the correct access, the data will not be collected.

3. Cloud Edition will date stamp each item recorded to Saleforce within this field to indicate the last date and time the item was created or updated by the system.

4. Create a **Report** in Salesforce that includes the **LinkPointTouchDate__c** field based on the users or objects you are collecting metrics for. This will demonstrate the impact of Cloud Edition across teams and data points.

Tip: You do not need to expose the LinkPointTouchDate__c field to end users to collect data or run reports. This will prevent data from being overwritten. The field is automatically detected by the Cloud Edition API.