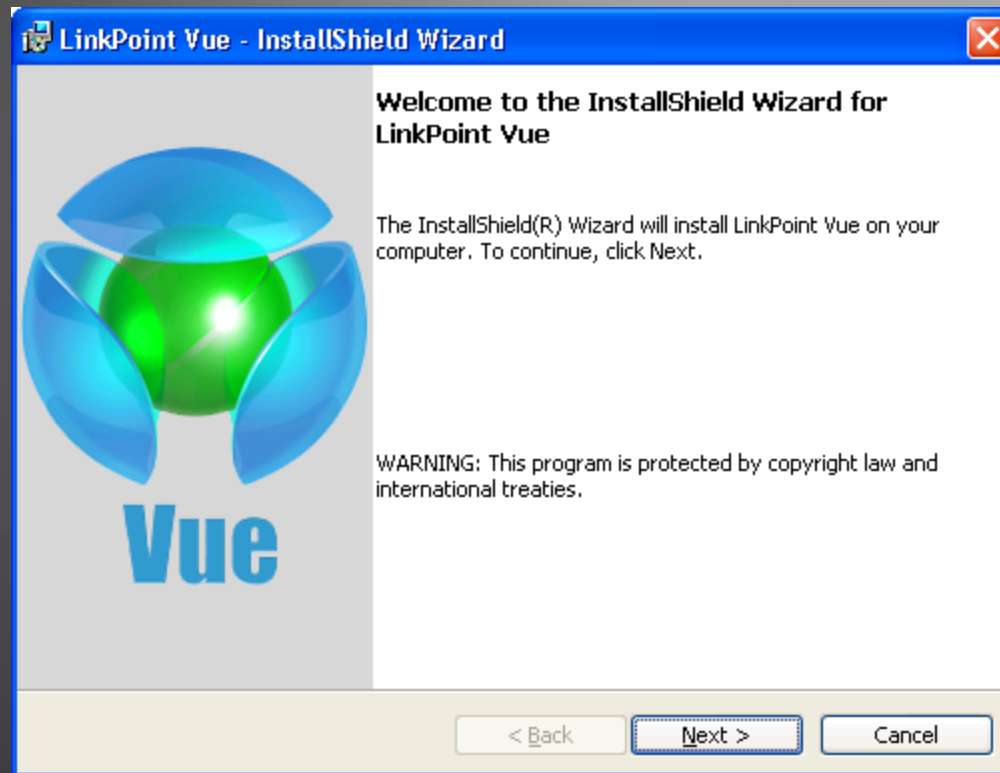


LinkPoint Vue

Installation and Configuration

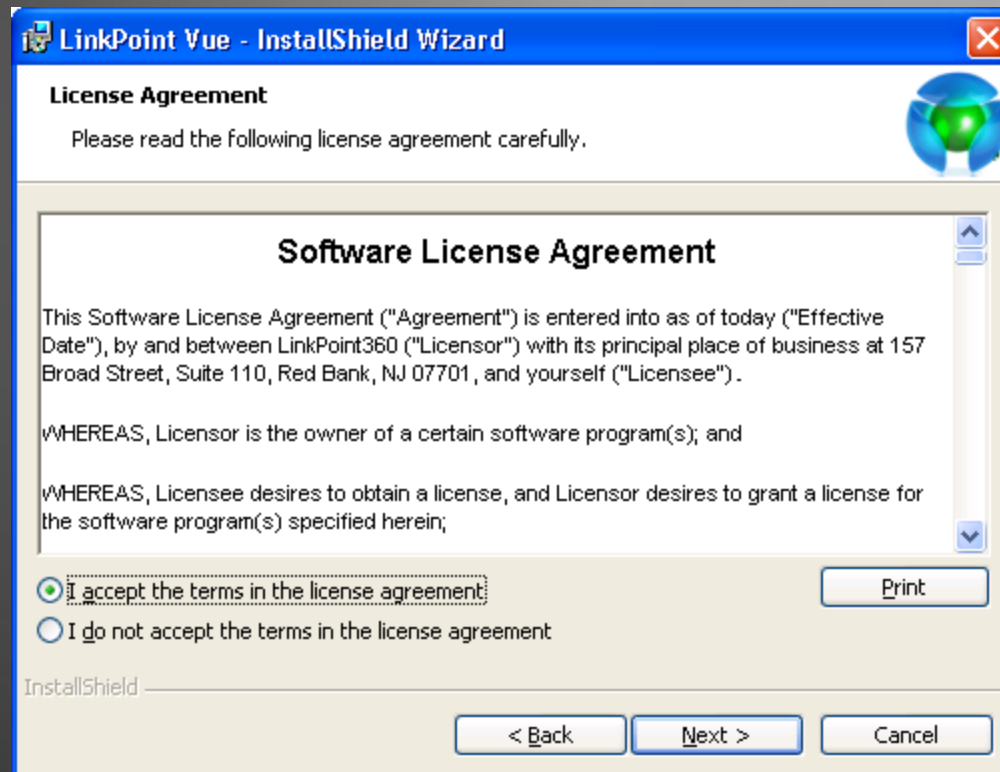


Step 1



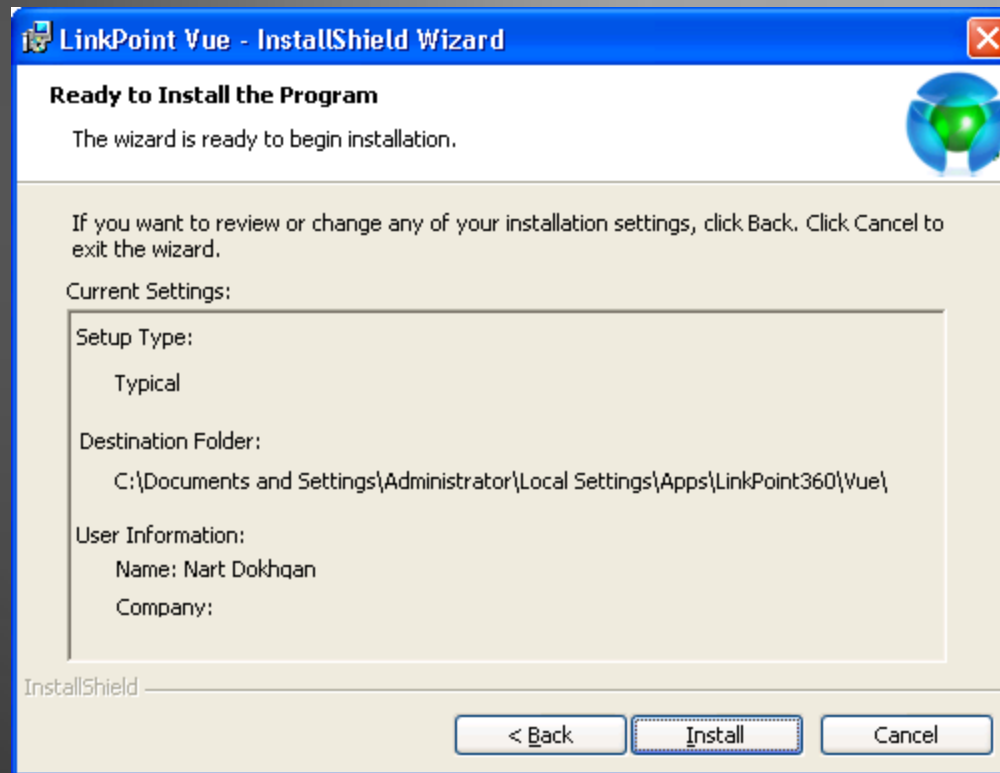
Start the LinkPoint Vue Setup and click "Next" to begin the installation.

Step 2



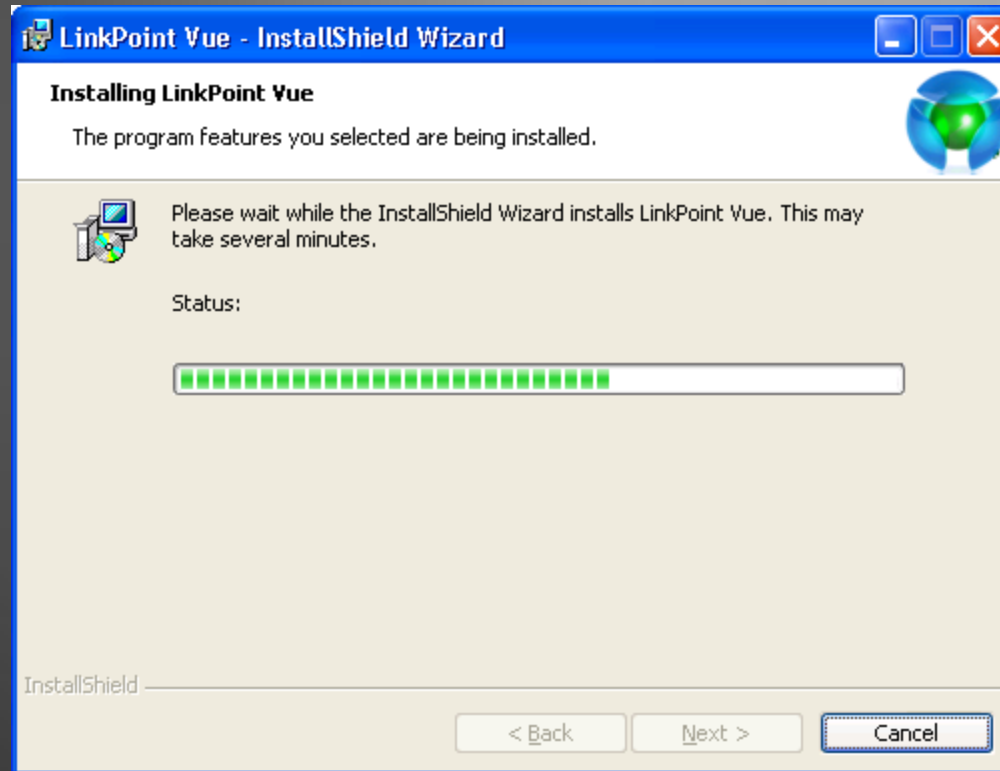
Click "I accept the terms in the license agreement", then click "Next".

Step 3



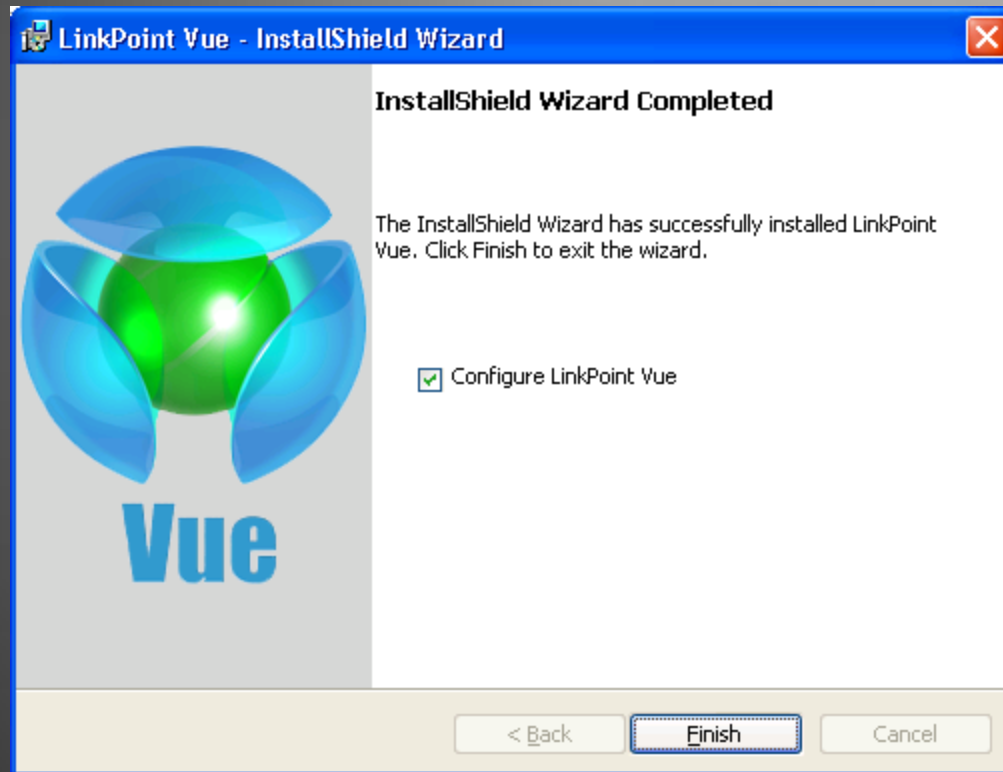
Click "Install" to begin the installation.

Step 4



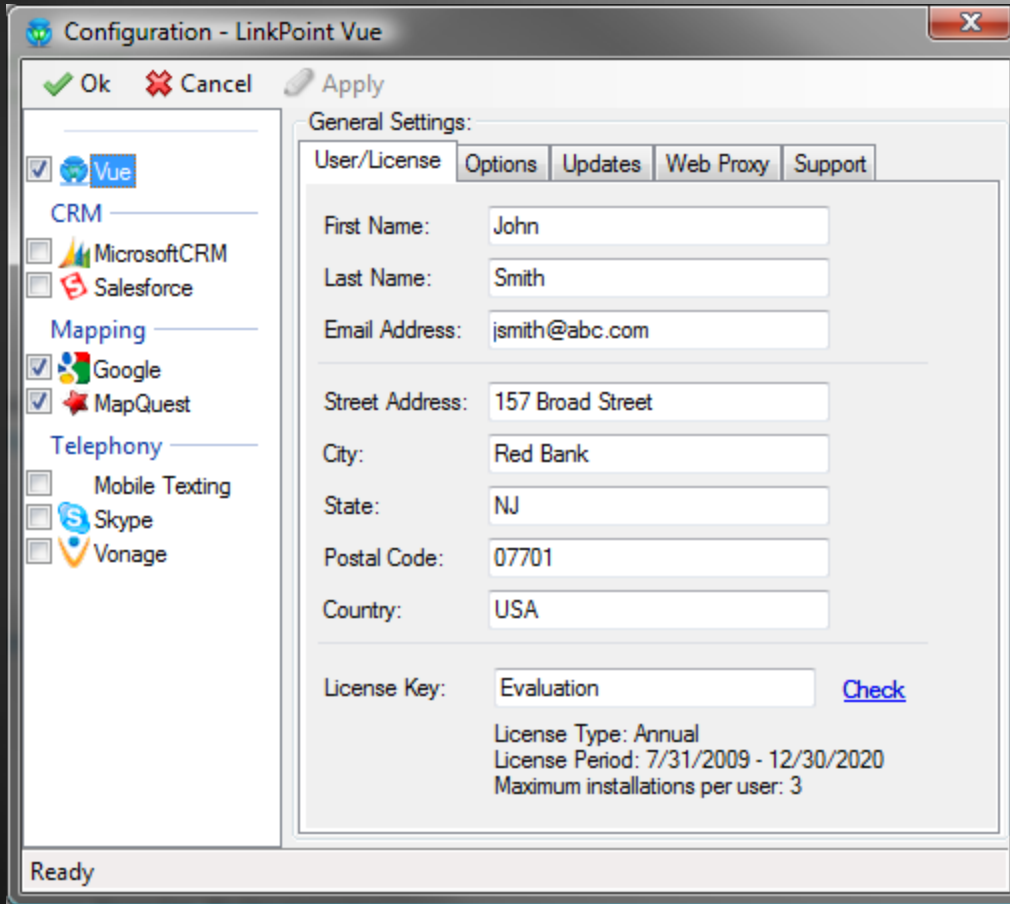
The LinkPoint Vue InstallShield Wizard is now installing the software. This may take several minutes.

Step 5



Check the “Configure LinkPoint Vue” box and click “Finish” to configure your settings.

Step 6: General Configuration



The screenshot shows the 'Configuration - LinkPoint Vue' window. The 'General Settings' tab is active, with sub-tabs for 'User/License', 'Options', 'Updates', 'Web Proxy', and 'Support'. The 'User/License' sub-tab is selected. The form contains the following fields and values:

Field	Value
First Name	John
Last Name	Smith
Email Address	jsmith@abc.com
Street Address	157 Broad Street
City	Red Bank
State	NJ
Postal Code	07701
Country	USA
License Key	Evaluation

Below the License Key field, the following license information is displayed:

- License Type: Annual
- License Period: 7/31/2009 - 12/30/2020
- Maximum installations per user: 3

The left sidebar shows the following categories and options:

- CRM**: Vue, MicrosoftCRM, Salesforce
- Mapping**: Google, MapQuest
- Telephony**: Mobile Texting, Skype, Vonage

Buttons at the top: Ok, Cancel, . The status bar at the bottom left says 'Ready'.

On the pop-up screen, enter the following required information:

- First Name
- Last Name
- Email Address
- License Key*

Then check the Microsoft CRM box, click “Apply”, and go to the “Connection” tab.

If you wish to use the mapping and direction features, enter your address information.

*If you purchased LinkPoint Vue, enter the provided license key here, otherwise enter “Evaluation”.

Configuration Setting

Configuring your settings is the final step to this installation. To proceed, first determine your system's configuration setting and skip to the appropriate step.

- If you have **on-premise configuration**, please proceed to Step 7A
- For those with **CRM online configuration**, please proceed to Step 7B
- Those with **Service Provider (SPLA) configuration**, please proceed to Step 7C

Additional Features

The following features are also available via LinkPoint Vue:

- Google Maps
- MapQuest
- Mobile Texting
- Skype
- Vonage

To activate some or all of these features, make sure to check the box next to the desired option(s) and perform the instructions that follow.

Step 7A: On-Premise Configuration

Configuration - LinkPoint Vue

Ok Cancel Apply

Vue

CRM

MicrosoftCRM

Salesforce

Mapping

Google

MapQuest

Telephony

Mobile Texting

Skype

Vonage

Microsoft CRM:

Connection Options About

Authentication Mode: Active Directory

For Active Directory, the user name and password may not be needed. Suggestion: Try without any values first.

User Name: jsmith@linkpoint360.com

Password: *****

Confirm Password: *****

Use Https:

Server: MSCRM

Port Number: 80

Organization Name: LinkPoint360

Partner: crm.dynamics.com

Environment:

Test Connection

Ready

Select “Active Directory” and enter the following information:

- User Name
- Password
- Server
- Organization Name*

If you are using HTTPS, check the box.

Based on your installation, the port is usually 80 or 555.

*The Organization Name is also known as the Organization Unique Name. When entered, it cannot contain any spaces.

Step 7B : CRM Online Configuration

Configuration - LinkPoint Vue

Ok Cancel Apply

Microsoft CRM:

Connection Options About

Authentication Mode: Windows Live CRM

User Name: jsmith@linkpoint360.com

Password: *****

Confirm Password: *****

Use Https:

Server: dev.crm.dynamics.com

Port Number: 443

Organization Name: LinkPoint360

Partner: crm.Dynamics.com

Environment: Production

Test Connection

Ready

Navigation bar (left):
Vue
CRM
MicrosoftCRM
Salesforce
Mapping
Google
MapQuest
Telephony
Mobile Texting
Skype
Vonage

Select “Windows Live CRM” and enter the following information:

- User Name
- Password
- Server
- Organization Name*
- Partner
- Environment

*The Organization Name is also known as the Organization Unique Name and can be found by following these instructions:

On the left-hand side navigation bar: Settings | System Settings | Customizations | Download Web Service Description files

If “Settings” does not appear on your navigation bar, contact your local administrator.

Step 7C: SPLA Configuration

Configuration - LinkPoint Vue

Ok Cancel Apply Exit

Microsoft CRM:

Connection Options About

Authentication Mode: Service Provider (SPLA)

User Name: jsmith@linkpoint360.com

Password: *****

Confirm Password: *****

Use Https:

Server: dev.crm.dynamics.com

Port Number: 80

Organization Name: LinkPoint360

Partner: crm.dynamics.com

Environment: Production

Test Connection

Ready

Select “Service Provider (SPLA)” and enter the following information:

- User Name
- Password
- Server
- Organization Name*
- Partner
- Environment

If you are using HTTPS, check the box.

Based on your installation, the port is usually 80 or 555.

*The Organization Name is also known as the Organization Unique Name and can be found by following these instructions:

Open Microsoft CRM and on the left-hand side navigation bar: Settings | System Settings | Customizations | Download Web Service Description files

If “Settings” does not appear on your navigation bar, contact your local administrator.

Contact Information

For any questions, please contact us at:

Sales: +1 732.212.8402

Support: +1 732.212.8403

Email: info@linkpoint360.com

Website: www.linkpoint360.com