

## LinkPoint for Salesforce

Outlook Integration for Salesforce

Learning Series

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Configuring LinkPoint Connect

# How to configure LinkPoint Connect

LinkPoint Assist - LinkPoint for Salesforce

Ok Cancel Apply About

**Components**

- LinkPoint Assist
- Vue
- Record
- Sync

**Connectors**

- Salesforce

**Vue Plugins**

- Ring Central
- Vonage

User/License Web Proxy Updates Start Up & Support

License Information:

First Name: Fred

Last Name: Wilson

Email Address: fwilson@linkpoint360.com

Street Address: 157 Broad Street

City: Red Bank

State: NJ

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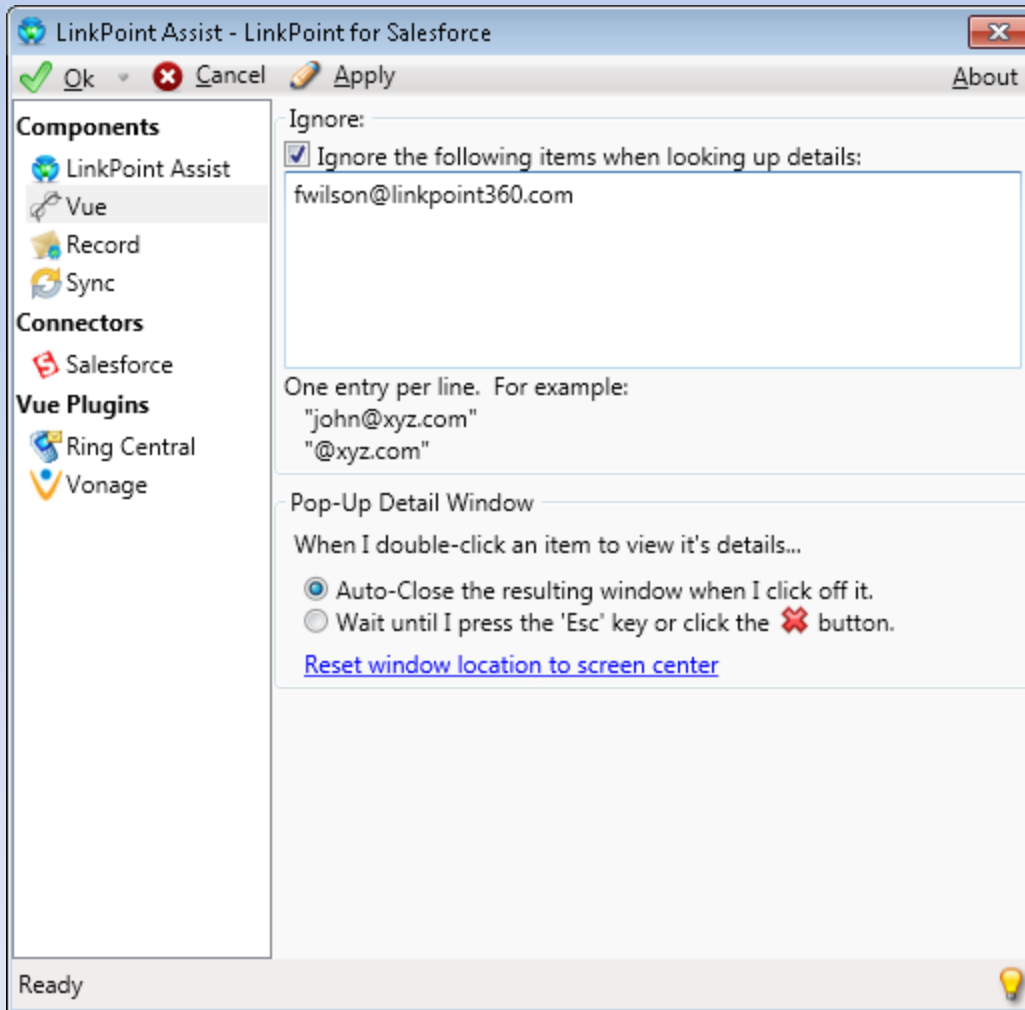
License Key: Evaluation

[Verify License](#)

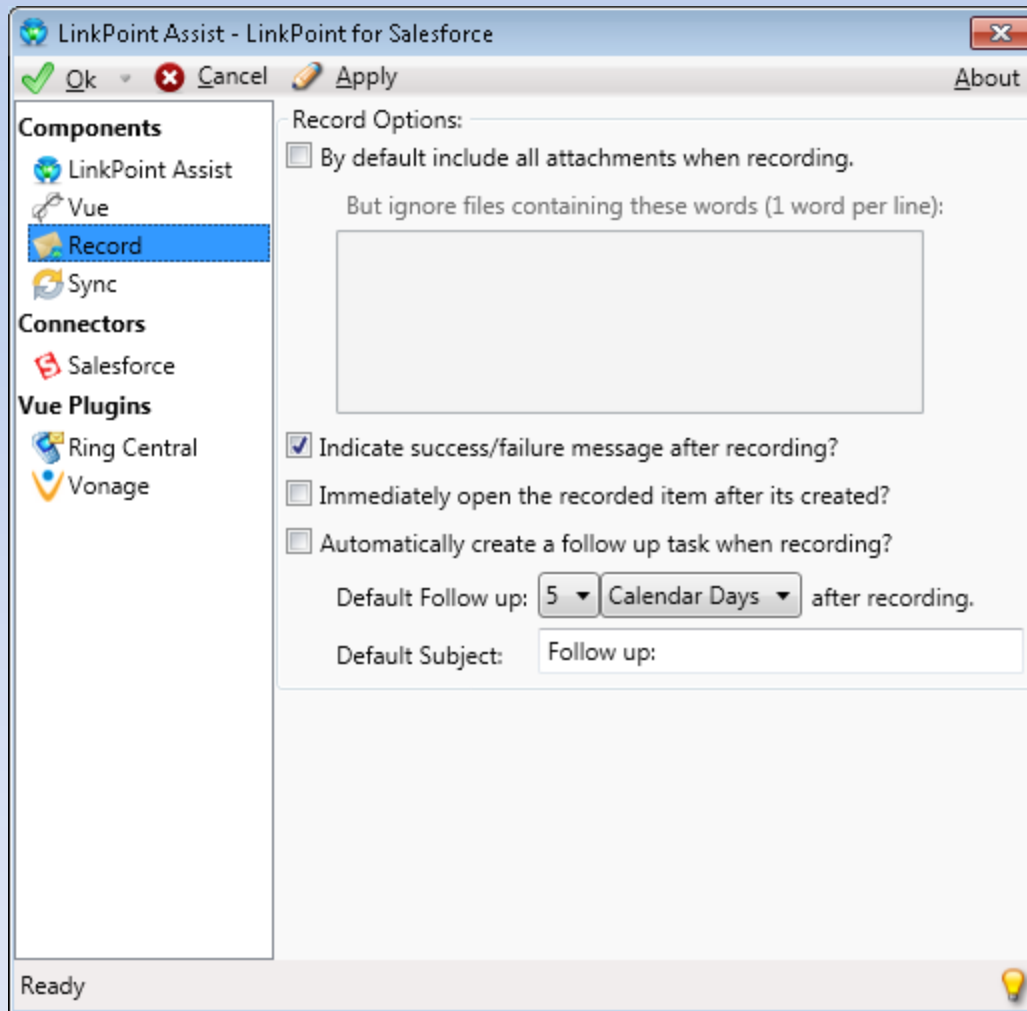
Licensed to: Beta Groups  
Perpetual license with annual  
Support & Maintenance through: 12/31/2010  
Installed Components:  
o Assist

Ready

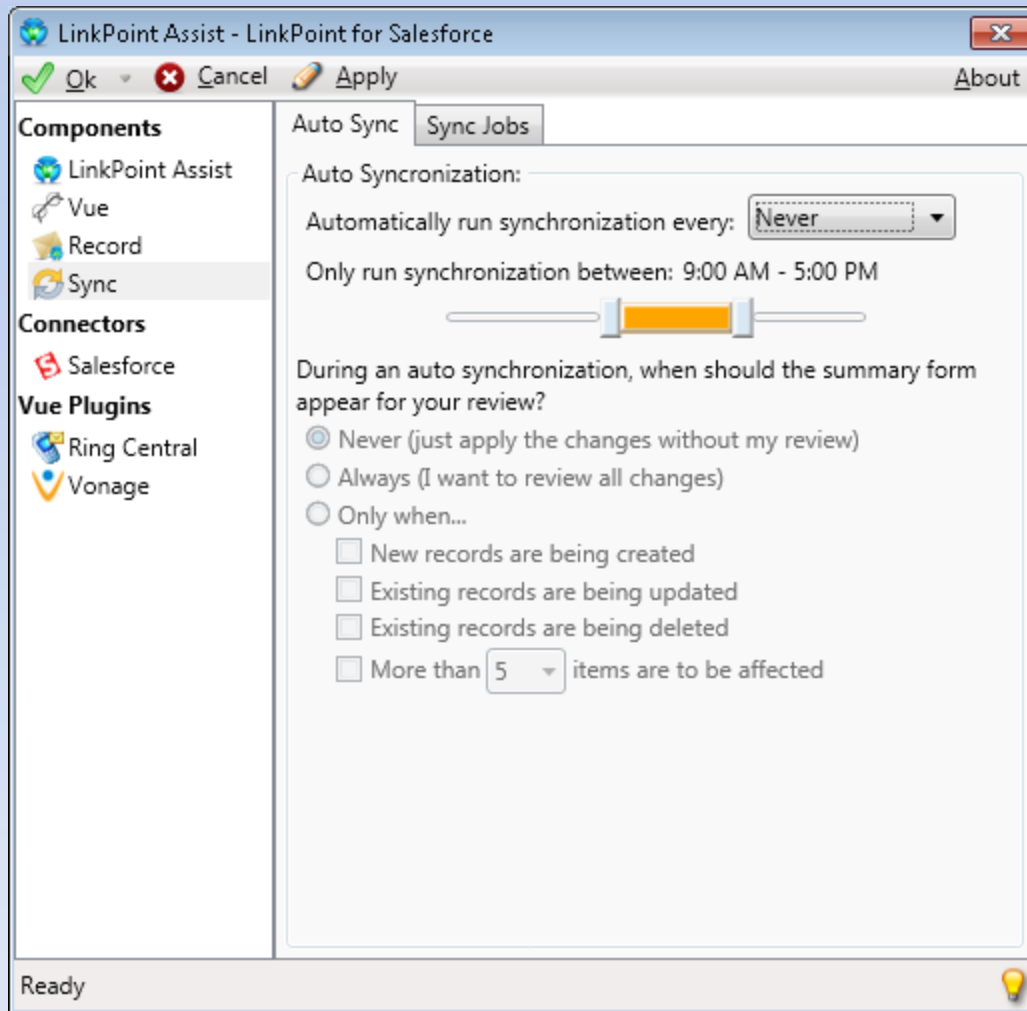
- Enter your First Name, Last Name and Email Address.
- If you would like to use the Mapping capabilities, enter in your address information.
- If you are evaluating LinkPoint Vue, leave "Evaluation" in the license key, otherwise enter the license key supplied by LinkPoint.
- Click Apply To Save



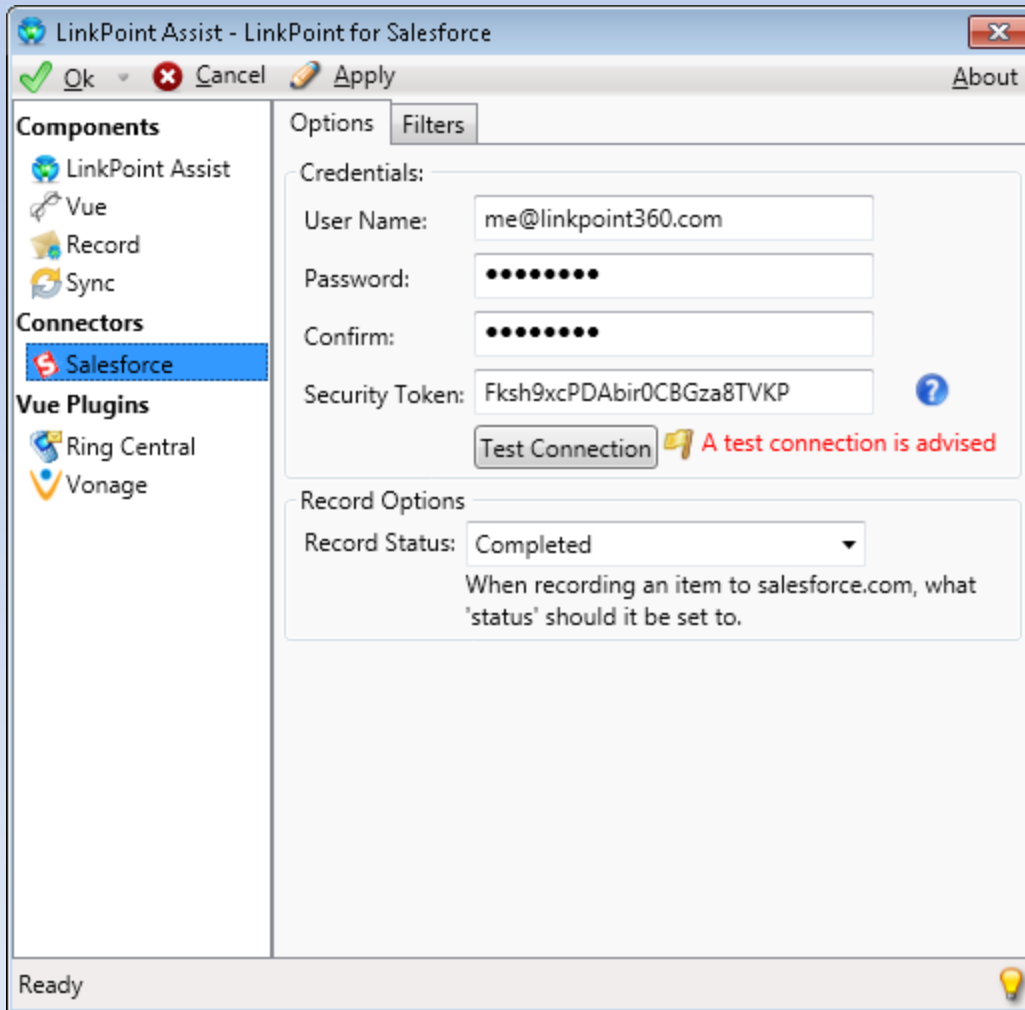
- Enter Email addresses you would like LinkPoint to ignore when displaying Contacts and Leads in the LinkPoint Panel.



- You can set the default of whether you would like to store attachments in Salesforce when saving Emails in Salesforce.
- You can also filter out select files. For example, you may have “.jpg” or “.pdf” which will not be stored in Salesforce by default.
- The Success/Failure message after recording is a balloon message in the system tray which appears for 1 second.
- LinkPoint can be configured to open the Email record in Salesforce immediately after saving it.
- LinkPoint can be configured to create a follow up task after saving an email by default.



- You can configure LinkPoint to auto synchronize at a set frequency.



- To configure LinkPoint Vue with Salesforce.com, enter in your User Name and Password.
- If your organization requires a Security Token, you can enter it here.
- Click “Test Connection” to confirm all your Salesforce credentials are correct.



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