Admin Setup Guide

Outlook Add-In Installation and User Setup Overview



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Overview

About This Guide

LinkPoint Blade works seamlessly with Microsoft Outlook on mobile phone, tablet, webmail, or desktop applications and across PC and Mac platforms. Users are able to record emails to Salesforce from Outlook as well as configure a variety of sync settings for emails, calendars, and contacts. Additional productivity features in the LinkPoint Blade Side Panel allow users to see Salesforce data in real time while interacting with records.

This guide will walk Admins through LinkPoint Blade account setup including the following steps:

- Installing the LinkPoint Blade Add-In for Outlook
- Connecting to Salesforce
- Confirming the Salesforce URL
- Establishing Sync Settings via Configuration Packs
 - Email Sync
 - Calendar Sync
 - Contact Sync
 - Cloning a Configuration Pack
- Inviting End Users to LinkPoint Blade

If you have additional questions or need assistance with your account configuration, please contact your Account Executive or support@linkpoint360.com.



Admin Setup Guide

Installing the LinkPoint Blade Add-In for Outlook

Tip: PC or Mac users should install LinkPoint Blade via the Outlook desktop application or webmail when getting started. Users looking to access the application from a mobile phone must have the official Outlook mail app installed and should install on PC or Mac first to gain automatic access to LinkPoint Blade on their phone. iPad users will have the best user experience by accessing LinkPoint Blade through Outlook Webmail.

Note that LinkPoint Blade is designed for Outlook compatibility and will not run on third-party mail applications.



2

Access the LinkPoint Blade Add-In by clicking this link for the <u>Microsoft AppSource store</u>.

Tip: Note that system administrators who do not plan on being end users of LinkPoint Blade will still need to install and create their account in order to manage the subscription.

Click the **Get It Now** button, and then click **Get Started**.



3

Click the button to **Open Blade Panel** in the Outlook toolbar. Then click **Get Started** in the LinkPoint Blade Side Panel.





Approve LinkPoint Blade from the Office 365 Admin Center

LinkPoint Blade through Outlook Webmail.

If users are unable to install Add-ins on their own and require admin permission, then the following steps would apply.

1	Log in to Office 365 Admin Center via https://portal.office.com/adminportal/
2	Either <u>install LinkPoint Blade from the Microsoft AppSource</u> , or if a user has attempted to install the Add-In, the LinkPoint Blade Application will already exist in the application list.
3	Grant admin consent for LinkPoint Blade.
4	Assign permissions to Users and/or Groups.
•	Tip: Users who install via desktop or webmail should have automatic access to LinkPoint Blade on their mobile devices through Outlook. Note that the application is designed for Outlook compatibility and will not run on third-party mail applications. Users must already have the Outlook app downloaded on their mobile device. iPad users may have the best user experience by accessing



Connecting to Salesforce

Tip: Before starting the connection process, **be sure you are logged into the correct Salesforce account**. This should be the Salesforce org you want to use to record emails, sync calendars and contacts, and – most importantly – invite users to populate your account.

1

LinkPoint Blade will launch the Preferences Pane. Select the **Salesforce Environment** that reflects your planned usage. Then click the **Connect to Salesforce** button. Note that choosing the Custom or Community option will require you to enter your Salesforce URL manually.

LinkPoint Blade	× ¤-	LinkPoint Blade	-== ×	LinkPoint Blade	-¤ ×
Preferences	8	Preferences	8	Preferences	8
General Preferences	~	General Preferences	~	General Preferences	Î
LinkPoint Support	~	LinkPoint Support	~	D LinkPoint Support Resources	~ I
Salesforce Connection	^	Salesforce Connection	^	Salesforce Connection	^
Environment: Standard	~	Environment: Standard	~	Community Community EndPoint:	~
Standard Sandbox/Test Community Custom		Connect to Salesforce		Sample: myportal.my.site.com/partnerportal	
Administration & Sync Settings	~	Administration & Sync Settings	~	Administration & Sync Settings	~

2

Log into Salesforce with the **Username** and **Password** of the account that includes the users you want to invite to LinkPoint Blade. Click **Allow** to grant LinkPoint Blade access to Salesforce.

		Allow Acce
		LinkPoint Blade is asking to:
calor	force	Access the identity URL service
Sales	Joice	 Manage user data via APIs
		 Manage user data via Web bro
		Access Connect REST API resource
	·	Access Visualforce applications
		Access unique user identifiers
		Access custom permissions
		Access Analytics REST API reso
semame		Access Analytics REST API Char
		Manage hub connections
		Manage Pardot services
		Access Lightning applications
		Access content resources
sword		Manage Data Cloud Ingestion
		Manage Data Cloud profile dat
		Perform ANSI SQL queries on I
		Access chatbot services
		Perform segmentation on Data
		Manage Data Cloud Identity Re
Log	; In	Access Headless Forgot Passwo
		Manage Data Cloud Calculated
		Access Headless Registration A
] Remember me		Access the Salesforce API Platfi
		Access Interaction API resource
		Access all Data Cloud API resor
rgot Your Password?	Use Custom Domain	Perform requests at any time
Bot rour russword.		Do you want to allow access for
agot rour russitora.		sallyanderson@1v784y.onmicroso
Not roal rasmola.		



Confirming the Salesforce URL

1

LinkPoint Blade will perform a discovery of your Salesforce account, making it easy for you to view, record, create, and sync information to Salesforce. When this is complete, click the [#] icon in the bottom right corner of the Side Panel to open the **Preferences Pane**.

2

Click to expand the **Administration & Sync** section, and click **Open Administration and Sync Settings** to launch the web browser.



3

Click **My Organization** in the left-hand menu. Then click the menu icon next to **Default Configuration**, and select **Edit** from the list.

\equiv LinkPoint Blade					Sally And Role: Organization Adm	Jerson nin Logout
My Organization						
My Profile Search Q	My Organization ABC Company					
	ABC Company License: Evaluation Edit				INVITE U	SERS
	03613 (1)					or the
	Name	Email Address	Configuration	Active License	Activated	
	Sally Anderson	sallyanderson@1v784y.onmicrosoft.com	Default Configuration	\checkmark	1	
	Configuration Pa Configuration packs allow To create a new pack, clo Default Comfiguran Edit Clone Access Control Perform Discovery	CKS (1) you to configure synchronization settings and apply t ne an existing item.	hem to users.			~

Tip: Access Control features offer a more in-depth way to configure settings for both auto sync and Side Panel options. These are recommended for advanced users. For more information, please contact your Account Executive or <u>support@linkpoint360.com</u>.

Tip: The Perform Discovery option on the Configuration Pack will force every user's instance of Salesforce to refresh the connection to ensure the most up-to-date data is in use.



Confirm the information in the **Salesforce Login Environment** and **Salesforce Login EndPoint** fields are correct based on the Salesforce org you want to use to sync data and import users. You can also rename the Configuration Pack at this time to reflect the group you plan on applying the settings for, such as Sales or Customer Service. Update the fields as needed, and click **Save** when complete.

Edit Configuration Pack Settings		×
Name	Default Configuration	
Description		
Salesforce Login Environment	Standard	•
Salesforce Login EndPoint	https://login.salesforce.com	
	SAVE	CANCEL



Establishing Email Sync Settings via Configuration Packs

Tip: Configuration Packs are a great way for administrators to group user sync settings based on similar needs. For example, you can create a Configuration Pack for one team that includes Contact Sync and a Configuration Pack for a second team that prevents Contact Sync altogether.

1

Click on **Default Configuration** or the custom name of your Configuration Pack to expand the table to view options for Email, Calendar, and Contact sync. While each of these comes provisioned with default settings, admins can change these settings as needed. Click **Email under the Sync Process** to launch the settings pane.

Configuration Packs (1) Configuration packs allow you to configure synchronization settings and apply them to users. To create a new pack, clone an existing item.						
=	Default Configuration [Default Config]				^	
	Sync Process	Schedule	Times	Permitted	Enabled*	
	Email	Mon, Tue, Wed, Thu, Fri	8:00 AM - 8:00 PM	✓	~	
	Calendar	Mon, Tue, Wed, Thu, Fri	8:00 AM - 8:00 PM	√	~	
	Contact					
	*- Denotes default value for new users.					

2

Review and update the available settings to reflect how you would like users to record or sync emails. **Fields** can be toggled on and off or updated from drop-down lists as needed. Note that the window scrolls to reveal a series of settings. Make any applicable changes, and click **Save** when complete.

Email Synchronization Settings			×
Basic Settings			
Is Permitted Is this sync process permitted to be run			•
Is Enabled Should the sync process run in the background on a regular basis?			•
AutoRelate Suggestions If no relations are made, accept suggestions			
Sync Unrelated Items Sync items that have not been related			
Rebuild History			-
Consecutive Errors If this value exceeds 12, auto-sync will not be run.	0		^ ~
Date Range to Synchronize			
Past Days to Synchronize			5 Days 👻
Future Days to Synchronize			2 Days 👻
		SAVE	CANCEL



Basic Settings			
Is Permitted	Enables or disables email sync for all users in the Configuration Pack		
Is Enabled	Runs email sync automatically in the background		
AutoRelate Suggestions	Syncs emails to Salesforce automatically if no selection is made in the Side Panel		
Sync Unrelated Items	Sync emails that do not have Salesforce record related to them		
Rebuild History	Resets sync associations (not recommended for admin configuration)		
Consecutive Errors	Determines how many times the sync can fail before the system stops attempting to run the process		
	Date Range to Synchronize		
Past Days to Synchronize	Sets how far back in history to sync emails based on send/received dates		
	Schedule		
Synchronize Days	Determines which days the email sync should be enabled to run		
Start synchronizing at	Sets the start time for the email sync process to run		
Repeat every	Establishes how often the email sync should run at regular intervals		
Stop synchronization after	Sets the end time for the email sync process to cease based on hours enabled		
Salesforce Settings			
Allow Salesforce records to be	Indicates whether Salesforce records can be created or updated by end users via the Side Panel		
	Exchange Settings		
Sync Folder	Select the folder(s) to be synced by the system		



Establishing Calendar Sync Settings via Configuration Packs



Click on **Default Configuration** or the custom name of your Configuration Pack to expand the table to view options for Email, Calendar, and Contact sync. Click the **Calendar Sync Process** to launch the settings pane.

С	Configuration Packs (1) Configuration packs allow you to configure synchronization settings and apply them to users. To create a new pack, clone an existing term.					
=	Default Configuration [Default Config]					^
	Sync Process	Schedule	Times	Permitted	Enabled*	
	Email	Mon, Tue, Wed, Thu, Fri	8:00 AM - 8:00 PM	√	~	
	Calendar	Mon, Tue, Wed, Thu, Fri	8:00 AM - 8:00 PM	√	~	
	Contact					
	*- Denotes default value for new users.					

2

Review and update the available settings to reflect how you would like users to sync calendars. **Fields** can be toggled on and off or updated from drop-down lists as needed. Note that the window scrolls to reveal a series of settings. Make any applicable changes, and click **Save** when complete.

Calendar Synchronization Settings			×
Basic Settings			
Is Permitted Is this sync process permitted to be run			•
Is Enabled Should the sync process run in the background on a regular basis?			•
Synchronize 'Private' items Should items marked as 'Private' be synchronized?			
AutoRelate Suggestions If no relations are made, accept suggestions			
Sync Unrelated Items Sync items that have not been related			
Rebuild History			•
Consecutive Errors If this value exceeds 12, auto-sync will not be run.	0		\$
Date Range to Synchronize			
Past Days to Synchronize			30 Days 👻
		SAVE	CANCEL



Basic Settings			
Is Permitted	Enables or disables calendar sync for all users in the Configuration Pack		
Is Enabled	Runs calendar sync automatically in the background		
Synchronize 'Private' Items	Determines whether calendar items marked Private should be synced		
AutoRelate Suggestions	Syncs calendar items to Salesforce automatically if no selection is made in the Side Panel		
Sync Unrelated Items	Sync calendar items that do not have Salesforce record related to them		
Rebuild History	Resets sync associations (not recommended for admin configuration)		
Consecutive Errors	Determines how many times the sync can fail before the system stops attempting to run the process		
	Date Range to Synchronize		
Past Days to Synchronize	Sets how far back in history to calendar items emails based on scheduled dates		
Future Days to Synchronize	Sets how far into the calendar planning to sync items based on scheduled dates		
	Schedule		
Synchronize Days	Determines which days the calendar sync should be enabled to run		
Start synchronizing at	Sets the start time for the calendar sync process to run		
Repeat every	Establishes how often the calendar sync should run at regular intervals		
Stop synchronization after	Sets the end time for the calendar sync process to cease based on hours enabled		
	Salesforce Settings		
Allow Salesforce records to be	Indicates whether Salesforce records can be created, updated, or deleted during the calendar sync		
	Exchange Settings		
Allow Exchange records to be	Indicates whether Exchange records can be created, updated, or deleted during the calendar sync		
Update 'Rich Text' fields	Allows the calendar sync to update richly formatted fields		



Establishing Contact Sync Settings via Configuration Packs



Click on **Default Configuration** or the custom name of your Configuration Pack to expand the table to view options for Email, Calendar, and Contact sync. Click the **Contact Sync Process** to launch the settings pane.

C	Configuration Packs (1) Configuration packs allow you to configure synchronization settings and apply them to users. To create a new pack, clone an existing item.					
=	Default Configuration [Default Config]					^
	Sync Process	Schedule	Times	Permitted	Enabled*	
	Email	Mon, Tue, Wed, Thu, Fri	8:00 AM - 8:00 PM	√	\checkmark	
	Calendar	Mon, Tue, Wed, Thu, Fri	8:00 AM - 8:00 PM	\checkmark	~	
	Contact					
	*- Denotes default value for new users.					

2

Review and update the available settings to reflect how you would like users to sync contacts. **Fields** can be toggled on and off or updated from drop-down lists as needed. Note that the window scrolls to reveal a series of settings. Make any applicable changes, and click **Save** when complete.

Contact Synchronization Settings			×
Basic Settings			
Is Permitted Is this sync process permitted to be run			
Is Enabled Should the sync process run in the background on a regular basis?			
Synchronize 'Private' items Should items marked as 'Private' be synchronized?			
Rebuild History			•
Consecutive Errors If this value exceeds 12, auto-sync will not be run.	0		\$
Schedule			
		S	unday
		М	onday
		Tu	esday
Syncronize days Days to perform synchronization		Wedn	esday 🦲
		Thu	irsday 🦲
		SAVE	CANCEL



Basic Settings				
Is Permitted	Enables or disables contact sync for all users in the Configuration Pack			
Is Enabled	Runs contact sync automatically in the background			
Synchronize 'Private' Items	Determines whether contacts marked Private should be synced			
Rebuild History				
Consecutive Errors	Determines how many times the sync can fail before the system stops attempting to run the process			
	Schedule			
Synchronize Days	Determines which days the contact sync should be enabled to run			
Start synchronizing at	Sets the start time for the contact sync process to run			
Repeat every	Establishes how often the contact sync should run at regular intervals			
Stop synchronization after	Sets the end time for the contact sync process to cease based on hours enabled			
	Salesforce Settings			
Allow Salesforce records to be	Indicates whether Salesforce records can be created, updated, or deleted during the contact sync			
Exchange Settings				
Allow Exchange records to be	Indicates whether Exchange records can be created, updated, or deleted during the contact sync			
Update 'Rich Text' fields	Allows the contact sync to update richly formatted fields			



Cloning and Creating Additional Configuration Packs

Tip: With an initial Configuration Pack set up, you can quickly and easily create new Configuration Packs via cloning and adjust the settings for other user groups.

Click the menu icon next to **Default Configuration**, and select **Clone** from the list. ≡ LinkPoint Blade H My Org 103 My Profile ABC Company Q ABC Company License: Ev Users (1) Name Email Address Configuration Active License Activated Sally Anderson sallyanderson@1v784y.onmicrosoft.com Inside Sales Configuration Packs (1) Configuration packs allow you to con To create a new pack, clone an existi Edit Clone Schedule Times Enabled Access Control Mon, Tue, Wed, Thu, Fri 8:00 AM - 8:00 PM 1 1 Perform Disc Mon. Tue. Wed. Thu. Fri 8:00 AM - 8:00 PM Contact

2

Click **Yes** to confirm and clone the existing Configuration Pack.

Confirm × Clone Configuration Pack 'Inside Sales'? NO YES



Two Configuration Packs are now listed in the table. To make them easier to use, you can change the names. Click the menu icon next to **Default Configuration**, and select **Edit** from the list. Change the **Name** field, and click **Save**.

Edit	у			^
Clone	Schedule	Times	Permitted	Enabled*
Delete	Mon, Tue, Wed, Thu, Fri	8:00 AM - 8:00 PM	√	✓
Access Control	Mon, Tue, Wed, Thu, Fri	8:00 AM - 8:00 PM	\checkmark	\checkmark
Perform Discovery				
*- Denotes default value for	new users.			
Edit Confi	iguration Pack Settings			×
	-			
Name		Incida Calaa	0.584	
		Inslue sales	- Сору	
D				
Description				
Salesforce Login E	invironment	Standard		*
Salesforce Login E	ndPoint	https://login	salesforce.com	
		· · ·		
			SAVE	CANCEL

4

Update the sync settings for each Configuration Pack as needed. In our example, the Marketing Configuration Pack does not have Calendar Sync permitted or enabled while the Inside Sales Configuration Pack has Calendar Sync both permitted and enabled.

	onfiguration Packs (2) onfiguration packs allow you to confi create a new pack, clone an existing Inside Sales [Default Config]	gure synchronization settings and apply them to user: i item.	3.			^
	Sync Process	Schedule	Times	Permitted	Enabled*	
	Email	Mon, Tue, Wed, Thu, Fri	8:00 AM - 8:00 PM	1	~	
	Calendar	Mon, Tue, Wed, Thu, Fri	8:00 AM - 8:00 PM	√	~	
	Contact					
	*- Denotes default value for new users.					
=	Marketing					^
	Sync Process	Schedule	Times	Permitted	Enabled*	
	Email	Mon, Tue, Wed, Thu, Fri	8:00 AM - 8:00 PM	1	~	
	Calendar					
	Contact					
	*- Denotes default value for new users.					



Inviting End Users to LinkPoint Blade



1

Tip: It is recommended that Organization Admins:

- Confirm their Salesforce URL, and
- Establish their sync settings via Configuration Packs

BEFORE inviting users to LinkPoint Blade. Once a user is invited, they will receive an email invitation to download and set up their instance of LinkPoint Blade, and any preconfigured settings you have established will take immediate effect.

Locate the **User** table on the **My Organization** page. Click the **Invite Users** button.

Users (1)				INVITE USERS
Name	Email Address	Configuration	Active License	Activated
Sally Anderson	sallyanderson@1v784y.onmicrosoft.com	Default Configuration	√	\checkmark

Tip: You will want to invite users in groups based on the Configuration Pack settings you want to globally apply. This allows you to streamline the invite process to groups rather than sending one-to-one invites.

2

Select the **Configuration Pack** to apply to the upcoming group of invited users using the drop-down list. Then, click the **Next** button.

ĝ	Invite Users		×
		Which Configuration Should be Applied to New Users	
		Inside Sales	
		Inside Sales	
		Marketing	
			σ



Use the **Search Salesforce** field to select users to invite. Search by first name, last name, email address, or Salesforce Profile.

옥† Invite Users	Aveilable O	0+	0	×
Course Collectore	Available U	pen Seat	S: 9	
Analytics	Q		Candidates (0)	
Search Results (2)				
Integration User noreply@example.com Analytics Cloud Integration User				
Security User Inoreply@example.com Analytics Cloud Security User				
ВАСК				NEXT

4

Click the checkbox to the left of the user in the **Search Results** to add it to the **Candidates** column. Create a list of users to invite by searching and adding up to the amount of Available Open Seats included with your subscription. Then, click the **Next** button.

의 Invite Users		×
Available O	Ipen Seats: 8	
Search Salesforce Q	Candidates (1)	
Search Results (1)	noreply@example.com Analytics Cloud Integration User	
noreply@example.com Analytics Cloud Security User		
BACK	NEX	кт



Confirm whether to send the invite email to the selected users. Click **Finish** to complete the import process and invite the users.

<u>j</u> e	Invite Users			×
			Integration User	
		What's Next? The selected individuals will be provisioned in LinkPoint Blade	orreply@example.com	
		Would you like to also send them an email explaining the app and providing some useful tins and links?		
		Send Email?		
В	ACK		• • • • • • • • • • • • • • • • • • • •	FINISH

6

View the updated list of invited users on the **User** table under **My Organization**.

Users (2)				INVITE USERS
Name	Email Address	Configuration	Active License	Activated
Integration User	noreply@example.com	Marketing	√	
Sally Anderson	sallyanderson@1v784y.onmicrosoft.com	Inside Sales	√	√



Tip: End users will receive a invitation email prompting them to complete the LinkPoint Blade configuration.